

Assignment

Aim: Design and develop custom Application (Mini Project) using Salesforce Cloud.

Objective: To create a custom application on Salesforce Lightning platform.

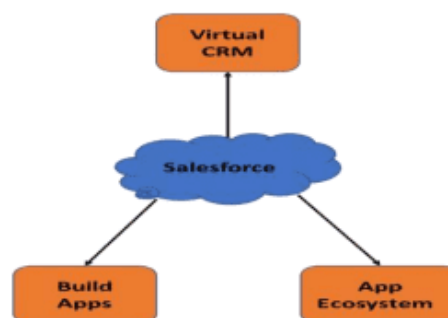
Theory:

1. Salesforce:

Salesforce is a cloud computing service as a software (SaaS) company that specializes in customer relationship management (CRM). Salesforce's services allow businesses to use cloud technology to better connect with customers, partners and potential customers. The software has become the number one for customer success and help businesses track customer activity, market to customers and many more services. Salesforce is a customer relationship management solution that brings companies and customers together. It is one integrated CRM platform that gives all your departments — including marketing, sales, commerce, and service — a single, shared view of every customer.

How Does Salesforce Work?

Salesforce is a CRM platform and also a centralized platform for managing customer accounts, sales leads, activities, customer support cases, and more. Users can access Salesforce through a web browser, mobile app, or desktop application. Salesforce allows users to customize and create custom objects, fields, processes, and reports and integrate them with other software products. Salesforce also provides marketing automation and Artificial Intelligence (AI) capabilities.



2. Salesforce Lightning Experience:

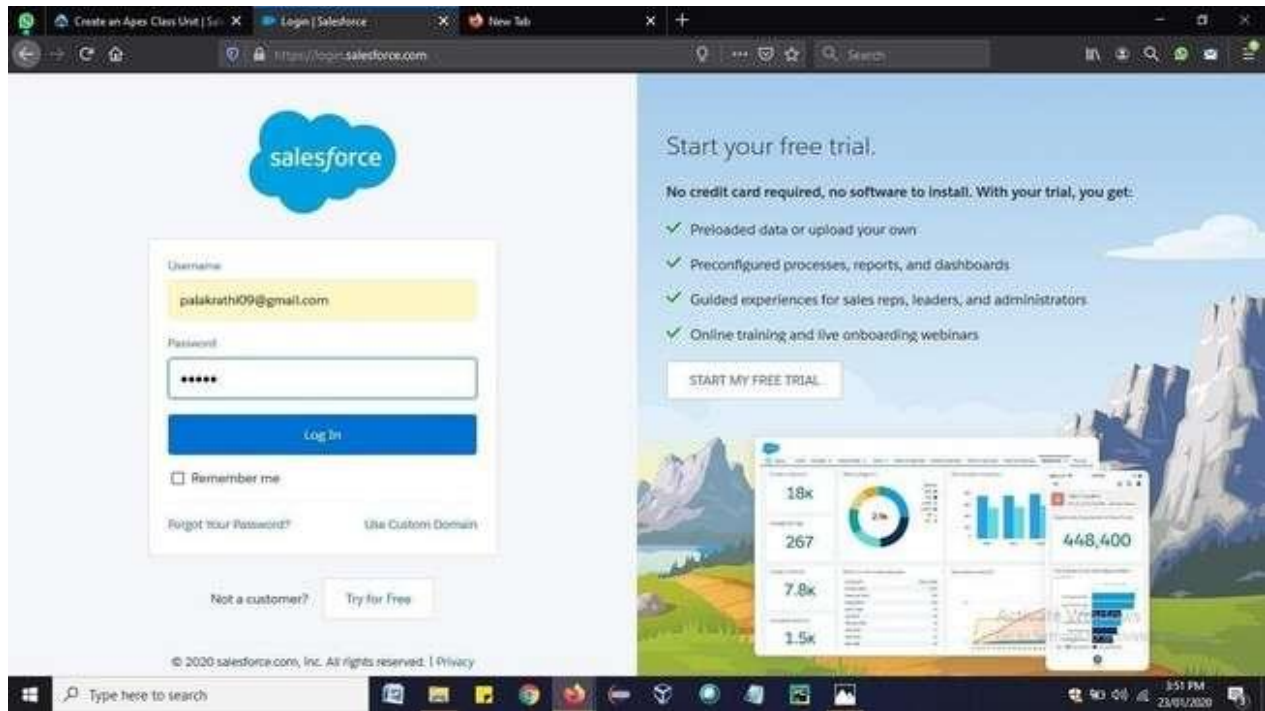
Salesforce Lightning Experience is simply referred to as “Lightning”. When working with lightning Salesforce we will learn about different Salesforce lightning topics like Lightning Login, Lightning App Builder, and Lightning for Outlook, Salesforce Lightning Components, Lightning Sync and many more. Some of them are applicable in Lightning Experience only, but some others will work in both Lightning Experience and older Classic user interfaces. Lightning Sync is used to sync your user contacts and events between your email servers with Salesforce.

Salesforce Lightning features

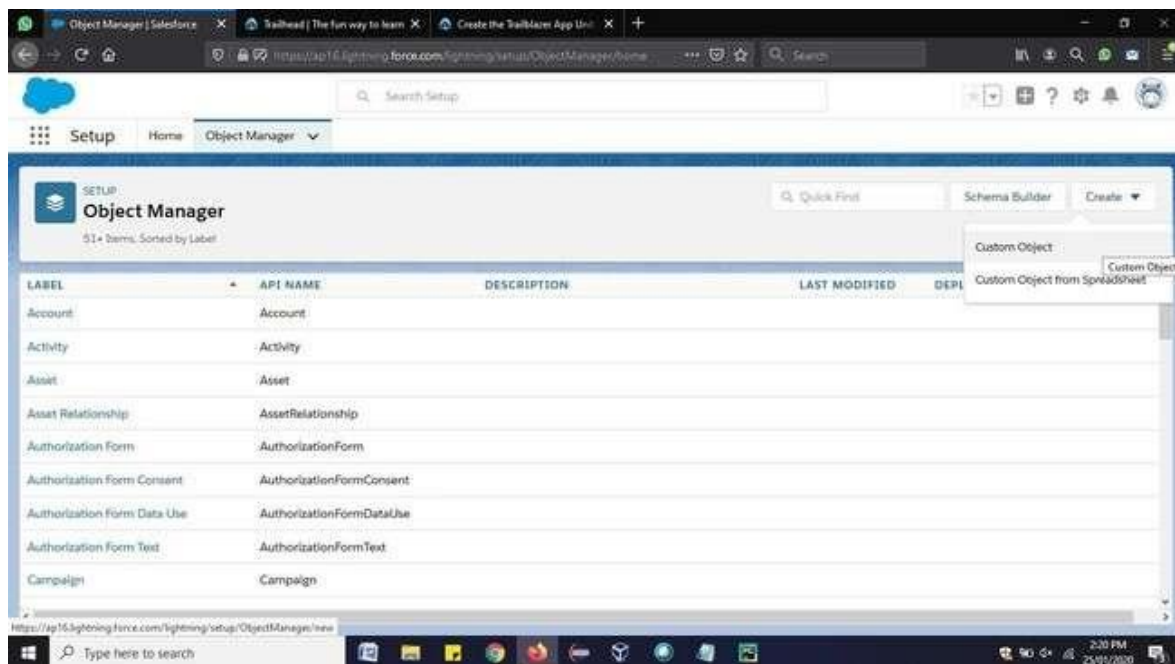
Here are some key Salesforce Lightning features:

- Experience Builder is a graphical user interface (GUI) optimized for speed. Administrators can build robust communities using Lightning templates and components following a visual no-code development approach.
- Lightning App Builder follows a no-code development approach providing drag-and-drop capabilities to facilitate app creation and customization.
- Lightning Component Framework includes tools and extensions that enable the development of reusable components and standalone apps and Salesforce Mobile App customizations.
- Design System offers style guides and user experience (UX) best practices for app development.
- Lightning Connect is an integration tool that makes it easier for Salesforce apps to consume data from any external source that conforms to the Open Data Protocol

Step 1: Log into Salesforce Developer account.



Step 2: Open Salesforce Lightning platform and click on Object Manager => Create => CustomObject.

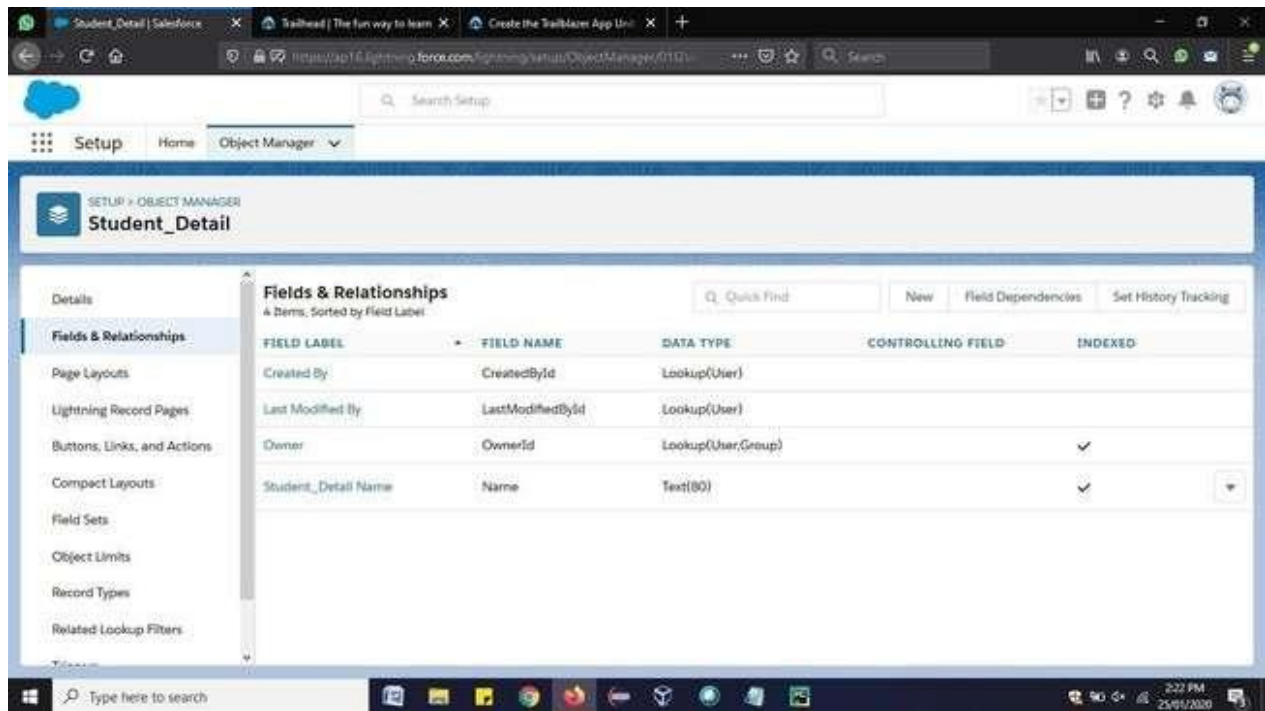


Step 3: Fill in the required fields and under Optional Features, select **Allow Reports** and **Allow Activities**. Click **Save**.

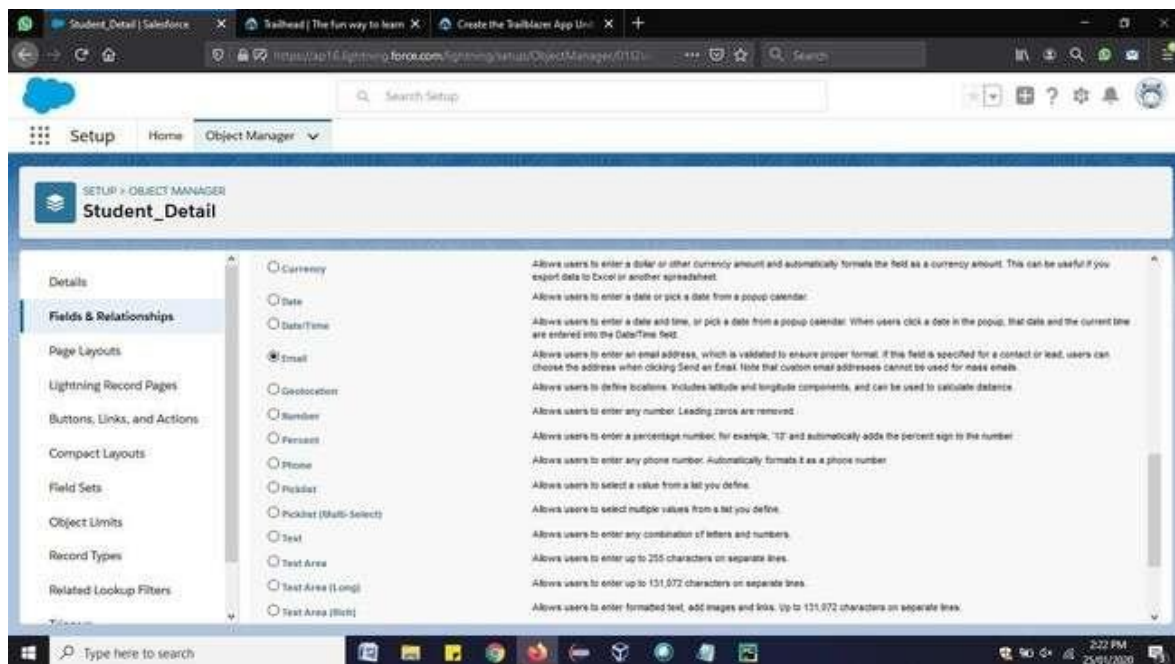
The screenshot shows the 'New Custom Object' setup page in Salesforce. The 'Custom Object Definition Edit' section is active. Under 'Custom Object Information', the 'Label' is 'Student_Detail' (Example: Account), 'Plural Label' is 'Student_Details' (Example: Accounts), and 'Object Name' is 'Student_Detail' (Example: Account). The 'Starts with vowel sound' checkbox is unchecked. A 'Description' field is present but empty. A yellow banner at the top states: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Set up roles](#) [Configure the default roles](#)'. Navigation buttons 'Save', 'Save & New', and 'Cancel' are at the top right of the section.

The screenshot shows the 'New Custom Object' setup page with the 'Enter Record Name Label and Format' section expanded. The 'Record Name' is 'Student_Detail Name' (Example: Account Name) and the 'Data Type' is 'Text'. Below this, the 'Optional Features' section is expanded, showing checkboxes for 'Allow Reports' (checked), 'Allow Activities' (checked), 'Track Field History' (unchecked), and 'Allow in Chatter Groups' (unchecked). The 'Object Classification' section is also visible, with checkboxes for 'Allow Sharing' (checked), 'Allow Bulk API Access' (checked), and 'Allow Streaming API Access' (checked). A 'Deployment Status' section is at the bottom. A 'What is this?' link is at the bottom right of the main content area.

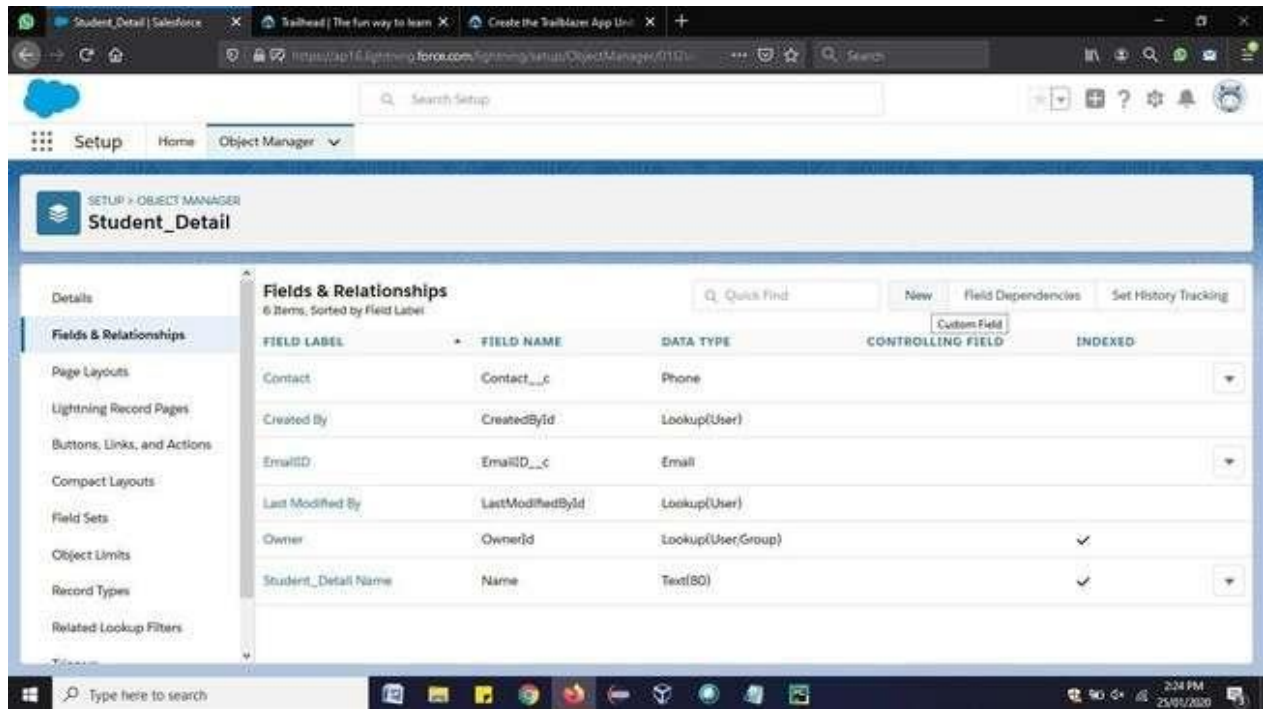
Step 4: Now, Click on Fields & Relations => New.



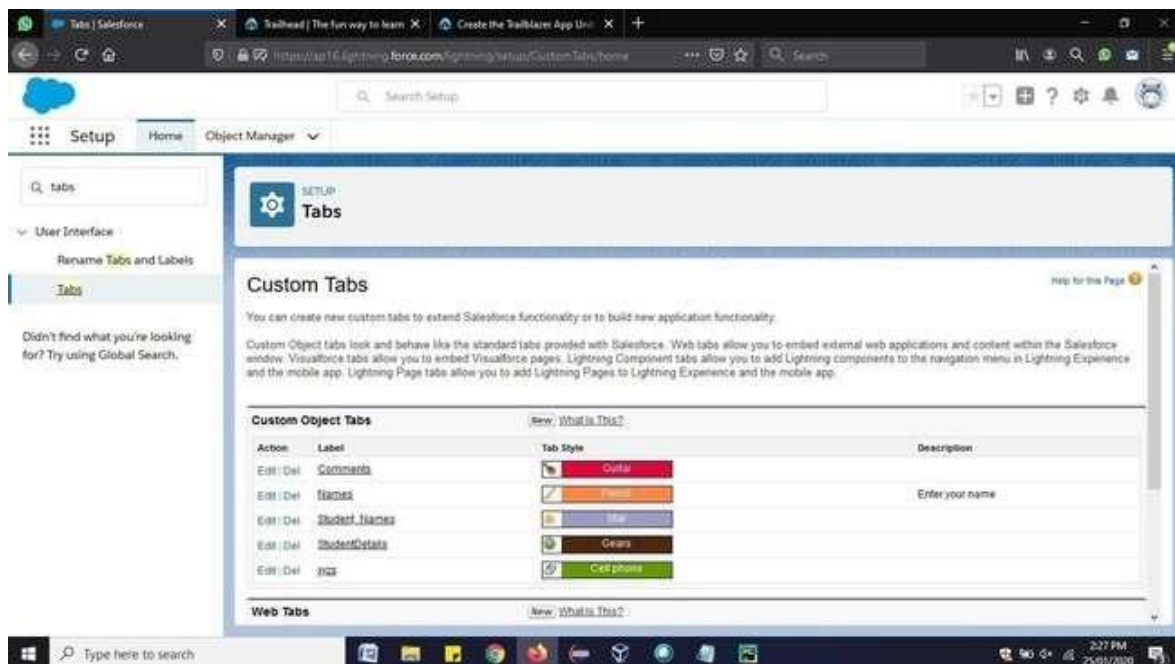
Step 5: Then select option -Email and click Next-> Next -> Save.



Step 6: Similarly. Repeat steps 4 and 5 to add more fields like Phone, Date of Birth. This is how the custom object will have the various fields.



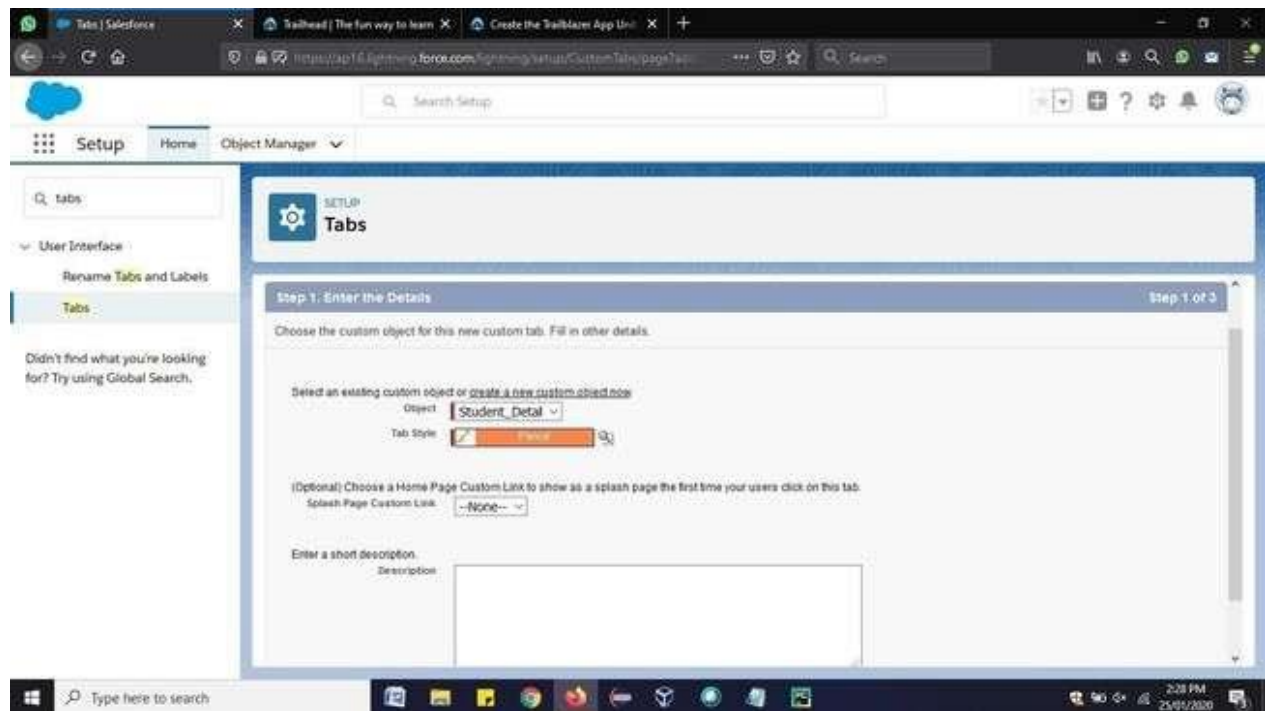
Step 7: Now go to Home => search for -Tabs. Click on New.



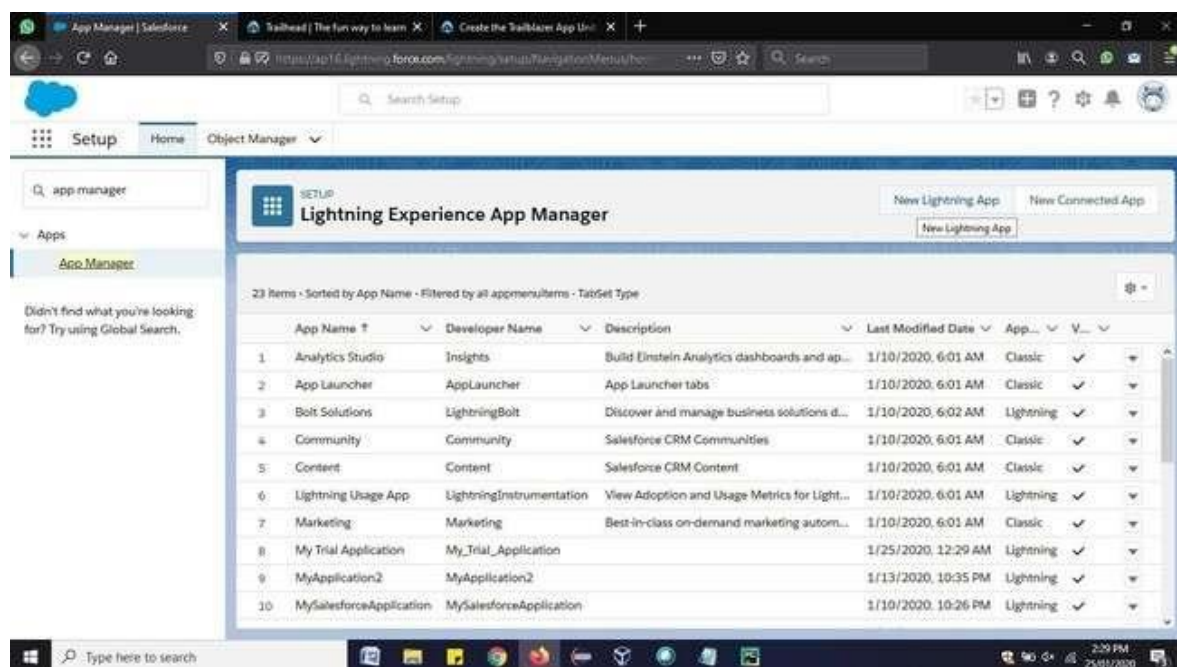
Step 8: Enter the Object name and select any icon for tab style. Leave all defaults as it is.

Click

Next, Next, and Save.



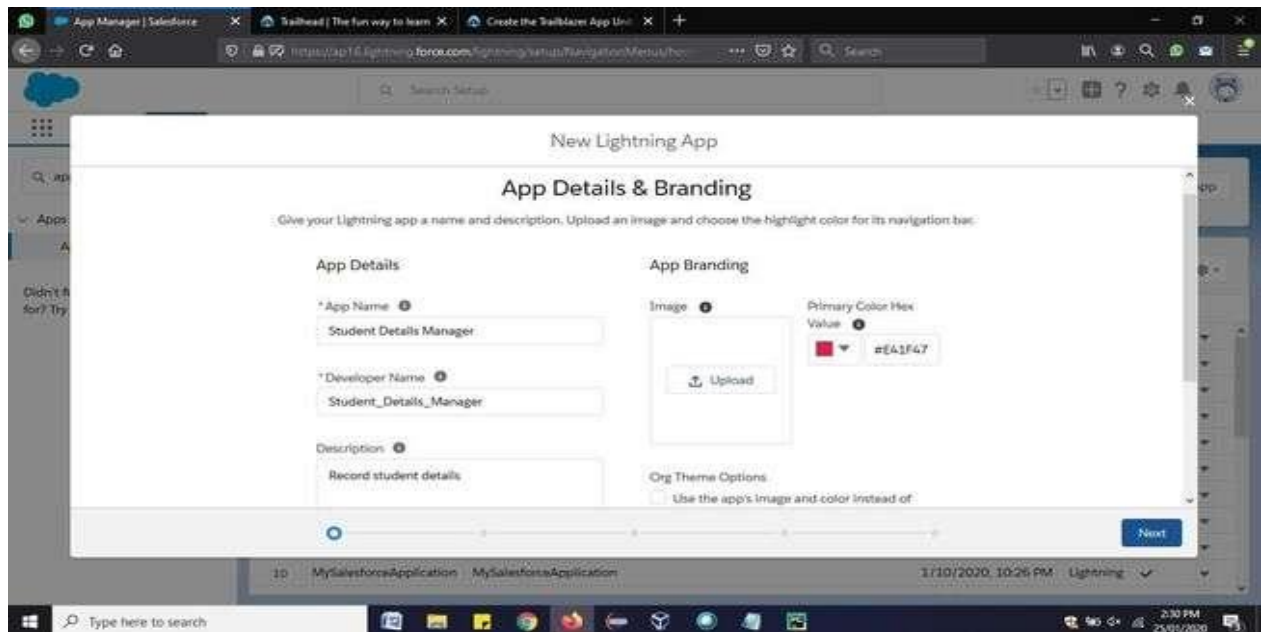
Step 9: In Setup, click **Home**. Enter -App Manager|| in Quick Find and select **App Manager**. Click **New Lightning App**.



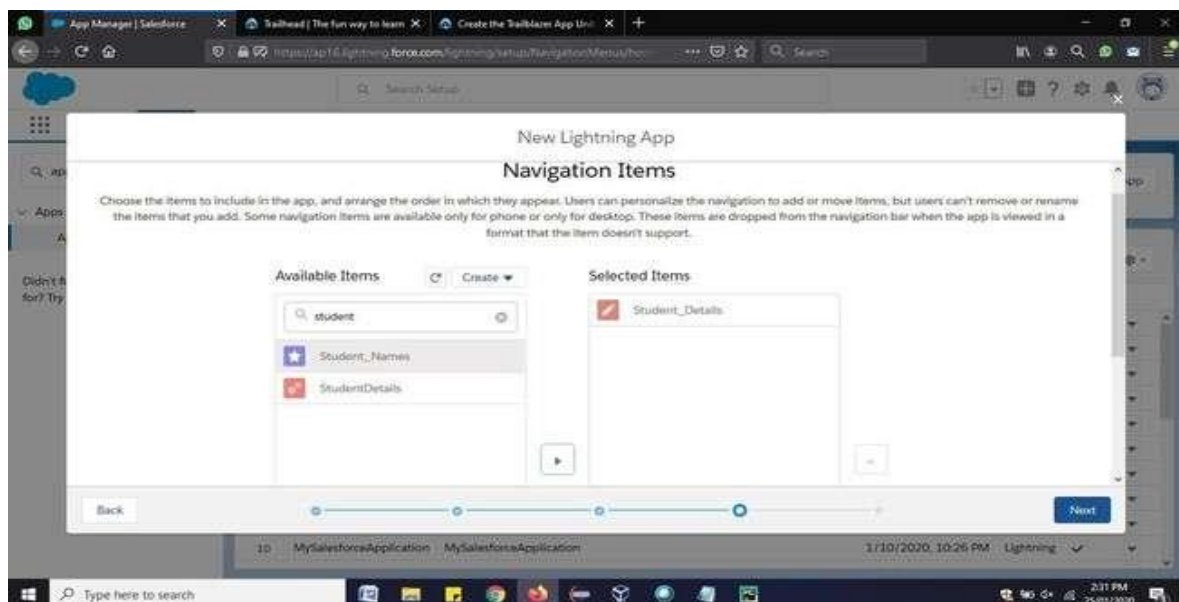
Step 10: Define the new Lightning app as follows:

App Name: Student Details Manager

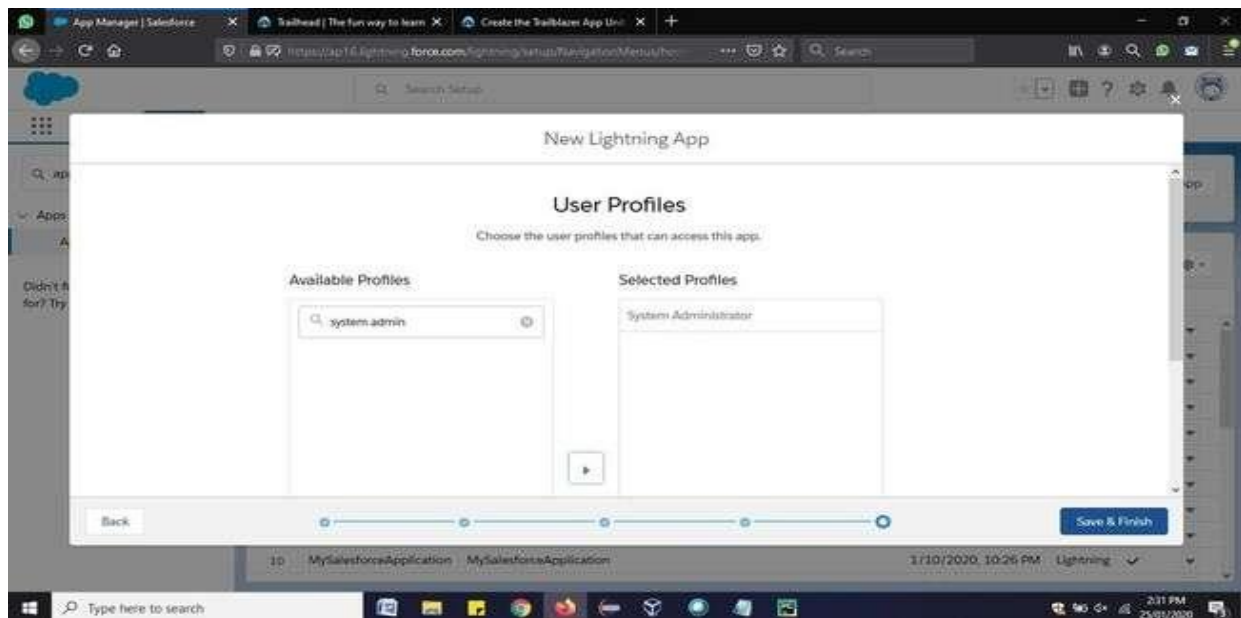
Developer Name: Student_Details_Manager. Click **Next**.



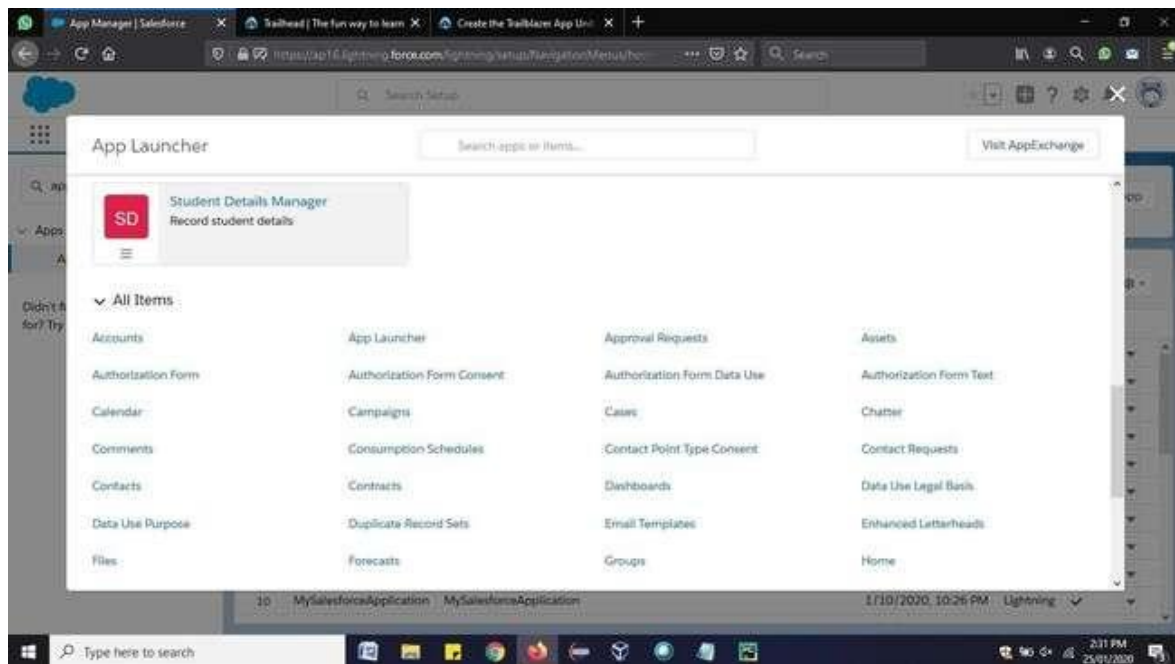
Step 11: On the App Options screen, leave the defaults as is and click **Next**. On the Utility Items screen, leave the defaults as is and click **Next**. On the Navigation Items screen, select **Student_Detail** and move them to the Selected Items box. Then click **Next**.

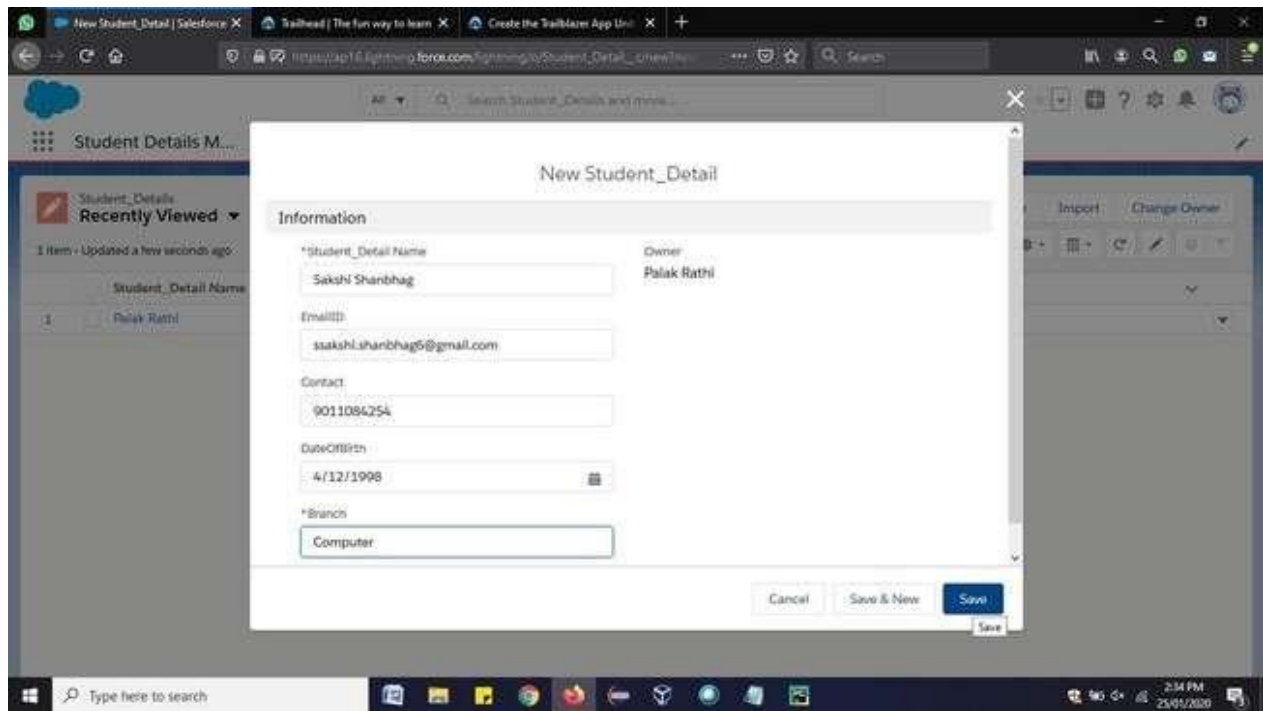


Step 12: On the Assign to User Profiles screen, select **System Administrator** and move it to Selected Profiles. Then click **Save & Finish**.

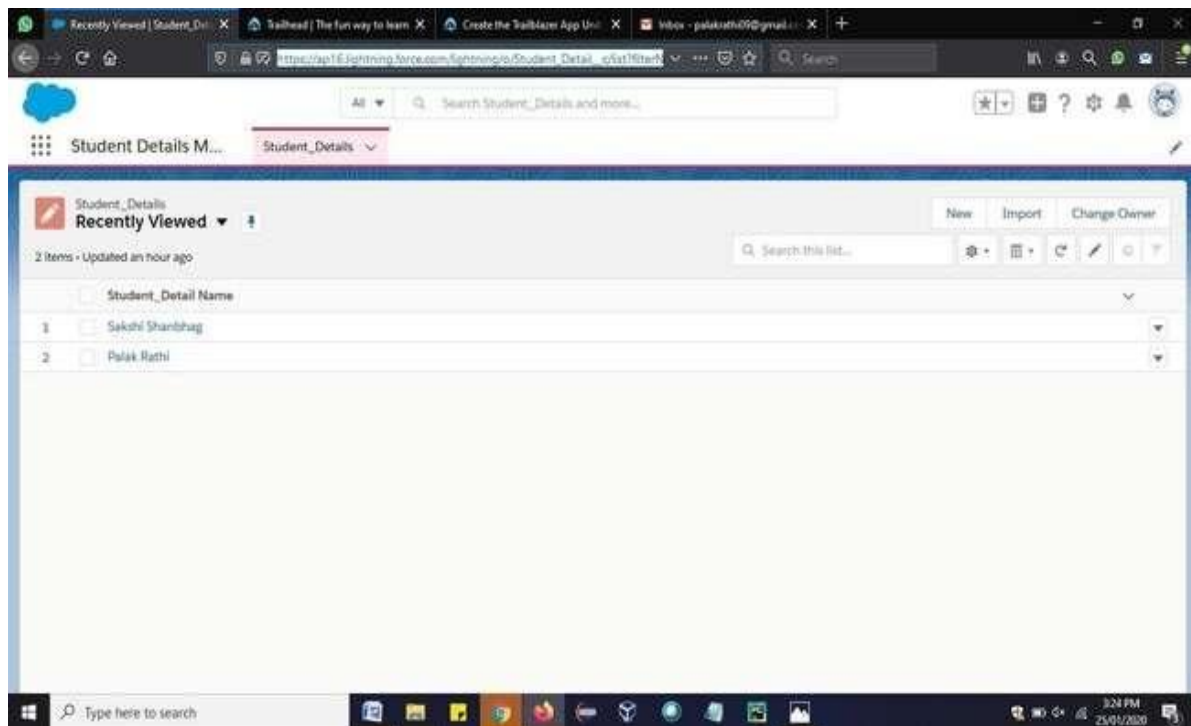


Step 13: Click on App launcher and Open the custom application created.

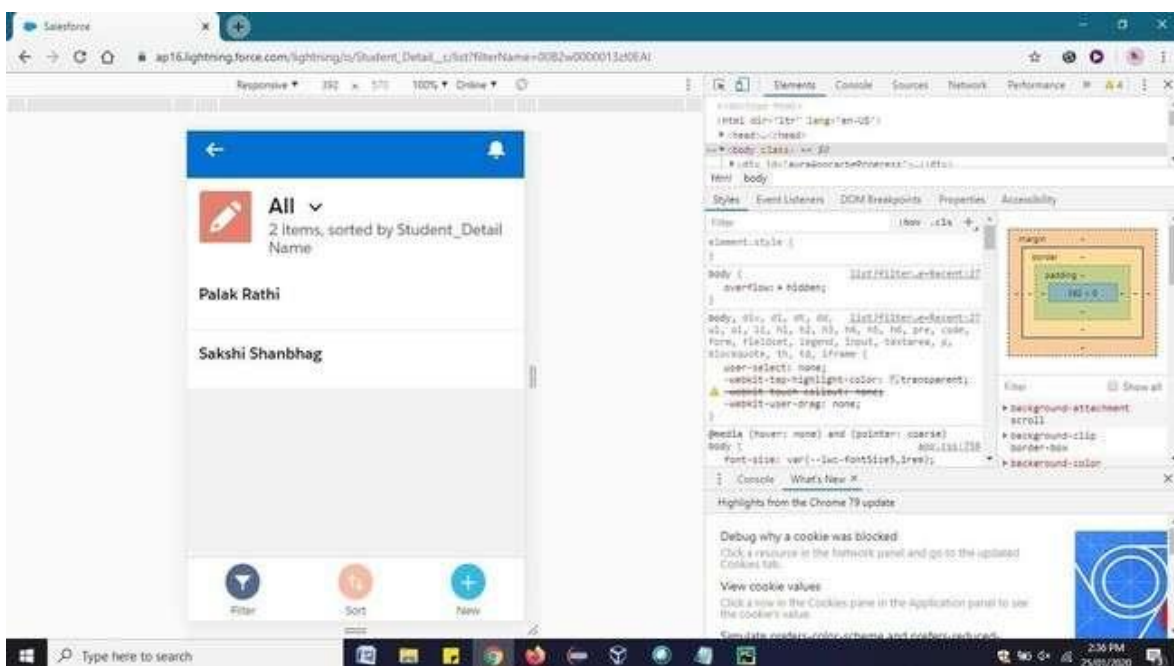
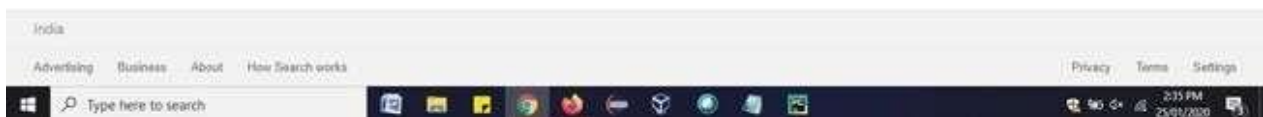




Step 14: Click on Student_Details => New => fill the specified details and copy the URL.



Google offered in: हिन्दी বাংলা తెలుగు मराठी தமிழ் ગુજરાતી ಕನ್ನಡ മലയാളം ਪੰਜਾਬੀ



NOTE: THIS IS JUST FOR THE REFERENCE THE SCREENSHOTS OF THE OUTPUTS SHOULD BE OF UR OWN APPLICATION(CREATE A NEW APPLICATION OF UR OWN LIKE BANKING APP, EMPLOYEE DETAILS SHOPPING MALL ETC)