

## Project Report on Retail Management Application Using Salesforce – (DEVELOPER)

**Milestone – 01:** Create Salesforce

**developers.salesforce.com/Signup**

Click on sign up.

On the sign-up form, enter the following details:

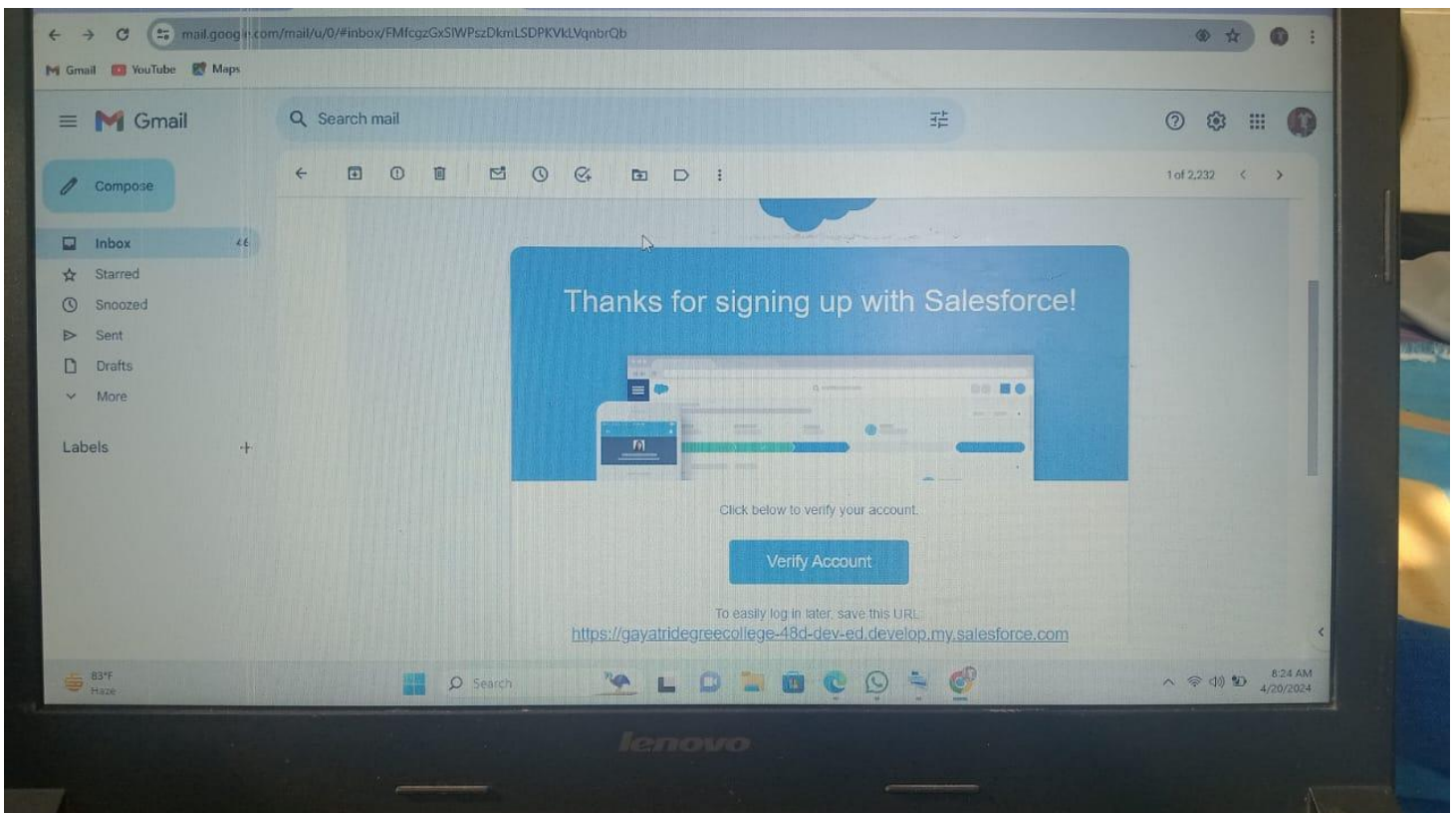
**First name & Last name – Shaik & Abubakar siddiq**

1. *Email* -shaikabubakarsiddiq658@gmail.com
2. *Role*: **Developer**
3. *Company*: **GAYATRI DEGREE COLLEGE - TIRUPATI**
4. *County*: **India**
5. *Postal Code*: **517501**
6. *Username*: shaikabubakarsiddiq658@gdcproject.com

### Account Activation

*Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account.*

*The email may take 5-10mins, as*

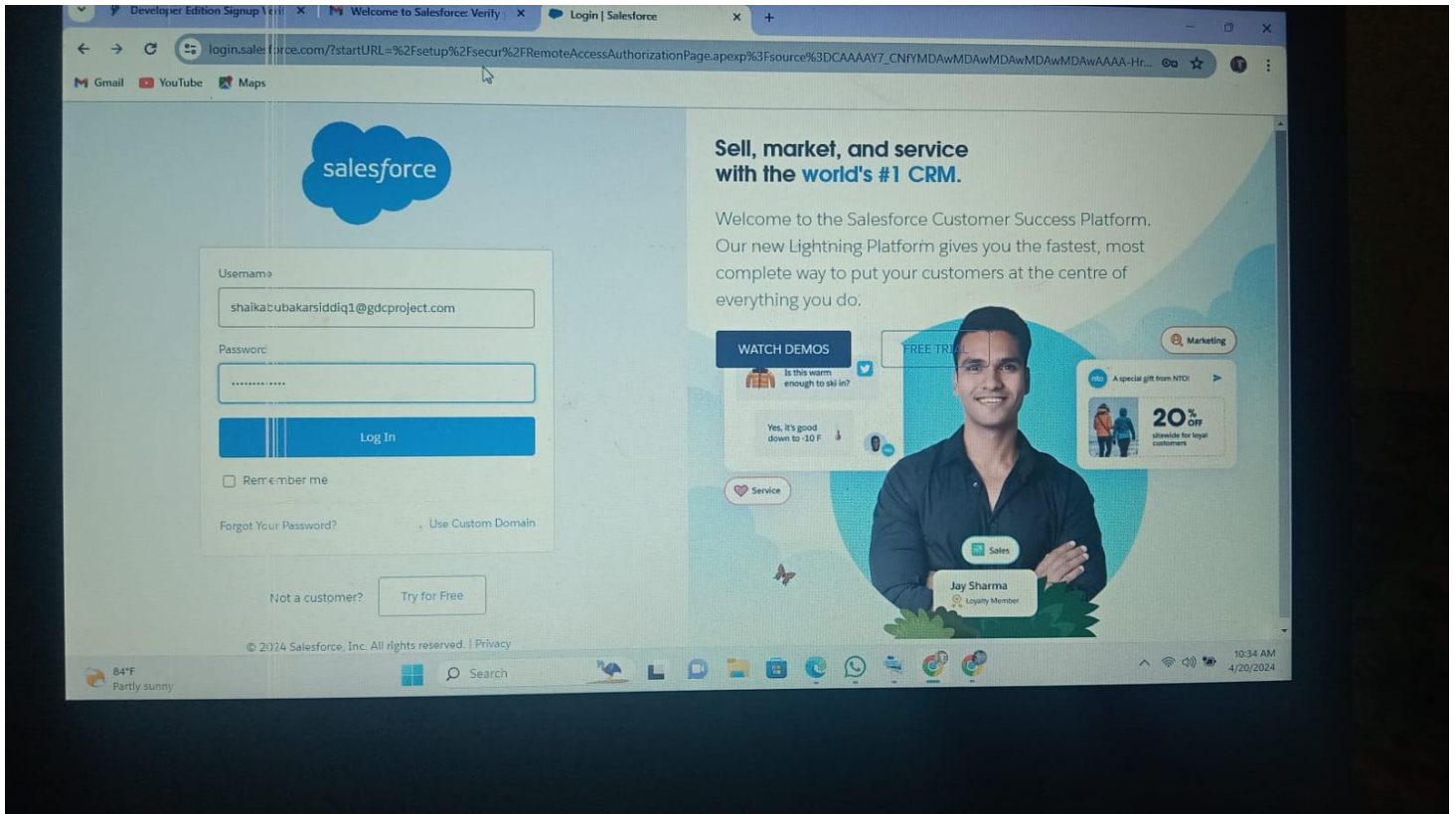


## Login to your Salesforce Org

1. Go to [salesforce.com](https://login.salesforce.com) and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.

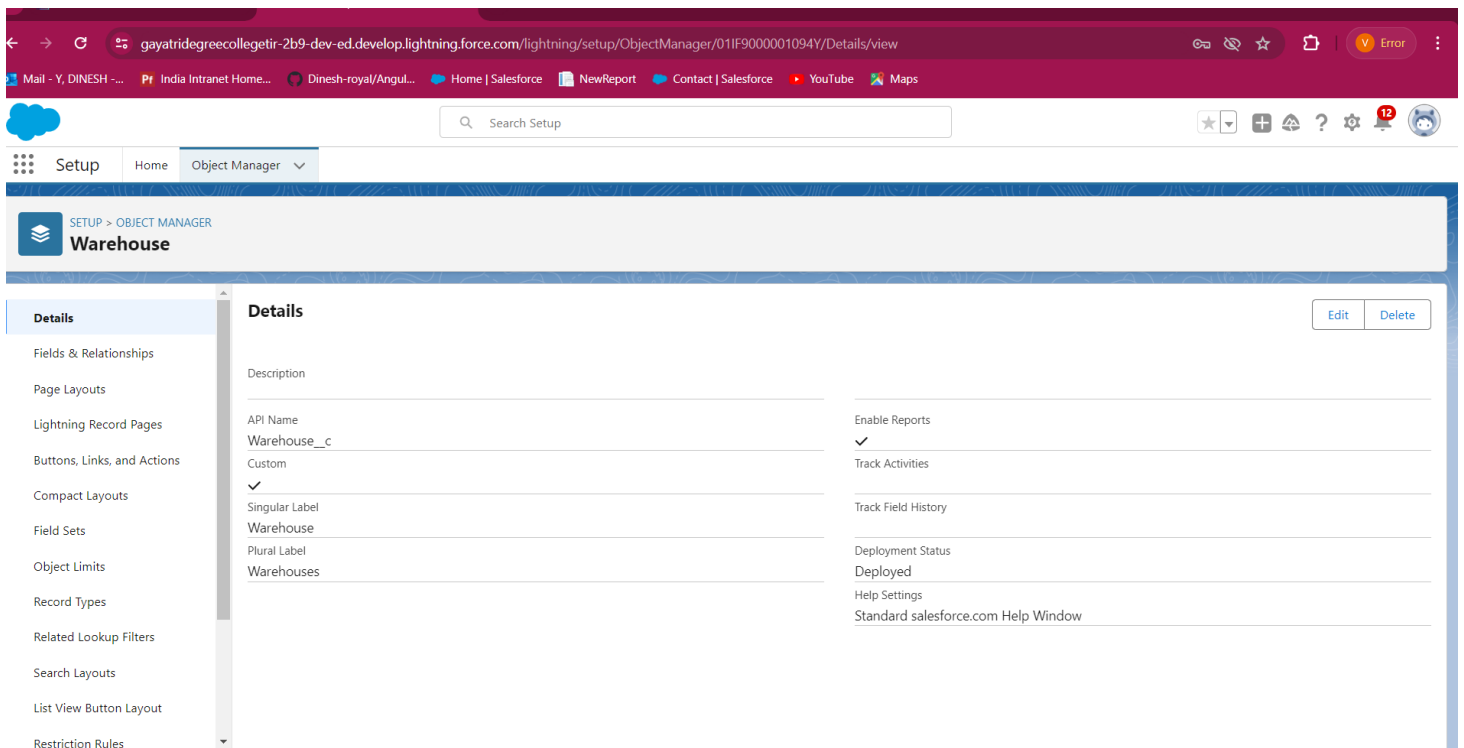
Salesforce Login:

<https://login.salesforce.com>



## Milestone - 02 : Creation Of Warehouse Object

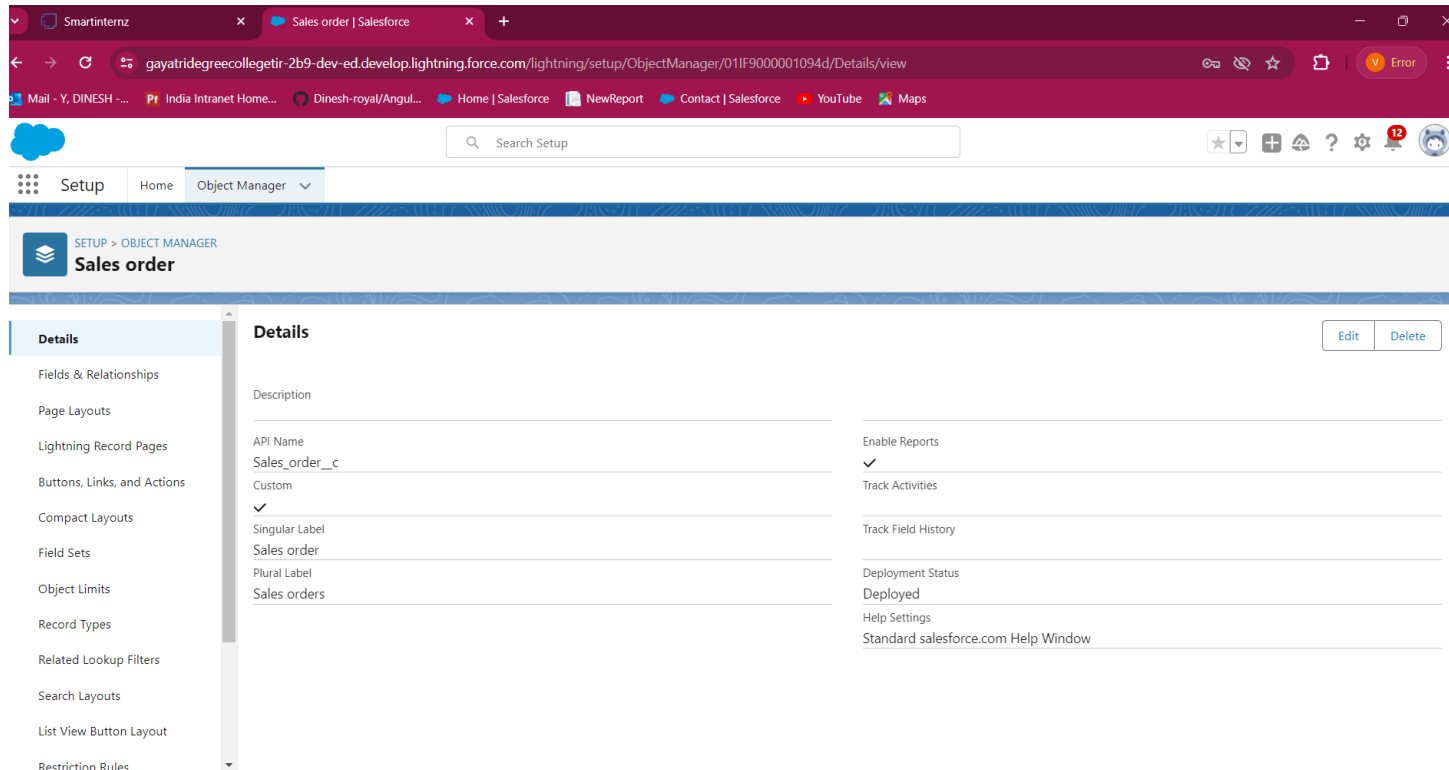
1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: **Warehouse**
6. Plural Label: **Warehouses**
7. Record Name: **Warehouse Name**
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save.



## Milestone – 03 : Creation Of Sales Order

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: **Sales order**
6. Plural Label: **Sales orders**
7. Record Name: **Sales order Number**
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox

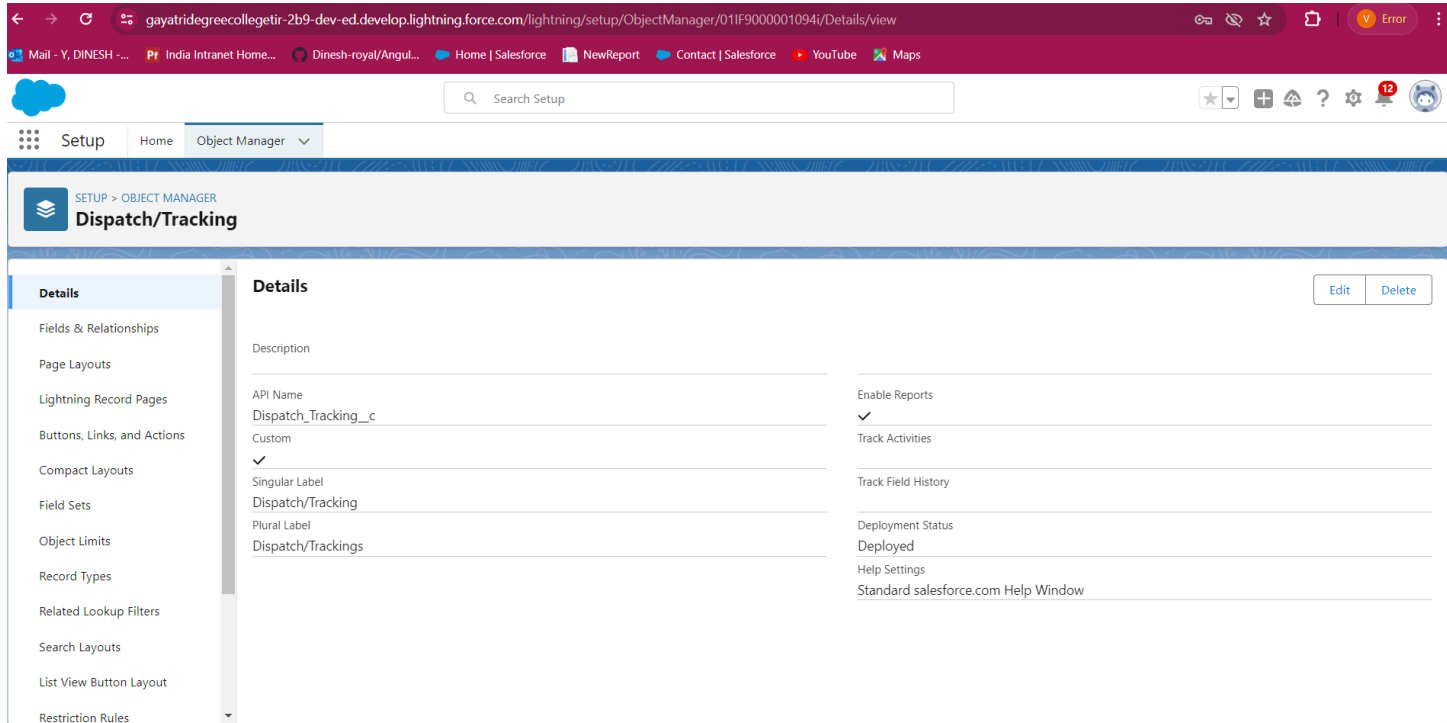
## 10. Click Save



### Milestone – 04 : Creation Of Dispatch/Tracking

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: **Dispatch/Tracking**
6. Plural Label: **Dispatch/Tracking**
7. Record Name: **Dispatch/Tracking**
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox

## 10. Click Save



## Milestone – 05 : What Is A Tab ?

### Create A Tab For Warehouse Object

Now create a custom tab. Click the Home tab.

1. Enter Tabs in Quick Find and select Tabs.
2. Under Custom Object Tabs, click New
3. For Object, select **Warehouse**.
4. For Tab Style, select any icon
5. Leave all defaults as is. Click Next, Next, and Save
6. In the same way create Tabs for all Custom Objects – Sales order, Dispatch /Tracking.

**Custom Tabs**

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

**Custom Object Tabs** [New](#) [What Is This?](#)

| Action                                     | Label              | Tab Style | Description |
|--|--------------------|-----------|-------------|
| <a href="#">Edit</a>   <a href="#">Del</a> | Dispatch/Trackings | Apple     |             |
| <a href="#">Edit</a>   <a href="#">Del</a> | Sales orders       | Heart     |             |
| <a href="#">Edit</a>   <a href="#">Del</a> | Warehouses         | Airplane  |             |

**Web Tabs** [New](#) [What Is This?](#)

No Web Tabs have been defined

**Visualforce Tabs** [New](#) [What Is This?](#)

No Visualforce Tabs have been defined

## Milestone – 06 : What Is An App

### Create The Sales App

1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.
3. Enter **Sales App** as the App Name, then click Next.
4. Under App Options, leave the default selections and click Next.
5. Under Utility Items, leave as is and click Next.
6. From Available Items, select Campaign, Leads, Accounts, Contacts, Opportunities, Products, Warehouse, Sales order, Dispatch/Tracking, Reports, and Dashboards and move them to Selected Items. Click Next.
7. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.

The screenshot shows the Salesforce Lightning Experience App Manager interface. The browser's address bar displays the URL: `https://gayatridegreecollegitir-2b9-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home`. The interface includes a top navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. A search bar is present in the top right. The left sidebar contains a search bar and a list of navigation options, including 'Salesforce Mobile App', 'Data', 'Mass Transfer Approval Requests', 'Apps', 'App Manager', 'AppExchange Marketplace', 'Connected Apps', 'External Client Apps', 'Settings', 'Lightning Bolt', 'Flow Category', 'Lightning Bolt Solutions', and 'Mobile Apps'. The main content area displays a table of installed apps, titled 'Lightning Experience App Manager'. The table has columns for 'App Name', 'Developer Name', 'Description', 'Last Modified Date', 'App Type', and 'Visibl...'. The table lists 12 apps, including 'All Tabs', 'Analytics Studio', 'App Launcher', 'Bolt Solutions', 'Commerce', 'Community', 'Content', 'Data Manager', 'Digital Experiences', 'Lightning Usage App', 'Marketing CRM Classic', and 'Platform'.

|    | App Name ↑            | Developer Name           | Description   | Last Modified Date  | App Type  | Visibl... |
|----|-----------------------|--------------------------|---|---------------------|-----------|-----------|
| 1  | All Tabs              | AllTabSet                |   | 08/04/2024, 2:29 pm | Classic   |           |
| 2  | Analytics Studio      | Insights                 | Build CRM Analytics dashboards and apps                             | 08/04/2024, 2:29 pm | Classic   | ✓         |
| 3  | App Launcher          | AppLauncher              | App Launcher tabs   | 08/04/2024, 2:29 pm | Classic   | ✓         |
| 4  | Bolt Solutions        | LightningBolt            | Discover and manage business solutions designed for your industry.  | 08/04/2024, 2:31 pm | Lightning | ✓         |
| 5  | Commerce              | Commerce                 | Manage your store's products, catalogs, and pricebooks.             | 08/04/2024, 2:29 pm | Lightning | ✓         |
| 6  | Community             | Community                | Salesforce CRM Communities  | 08/04/2024, 2:29 pm | Classic   | ✓         |
| 7  | Content               | Content                  | Salesforce CRM Content  | 08/04/2024, 2:29 pm | Classic   | ✓         |
| 8  | Data Manager          | DataManager              | Use Data Manager to view limits, monitor usage, and manage recipes. | 08/04/2024, 2:29 pm | Lightning | ✓         |
| 9  | Digital Experiences   | SalesforceCMS            | Manage content and media for all of your sites.                     | 08/04/2024, 2:29 pm | Lightning | ✓         |
| 10 | Lightning Usage App   | LightningInstrumentation | View Adoption and Usage Metrics for Lightning Experience            | 08/04/2024, 2:29 pm | Lightning | ✓         |
| 11 | Marketing CRM Classic | Marketing                | Track sales and marketing efforts with CRM objects.                 | 08/04/2024, 2:29 pm | Classic   | ✓         |
| 12 | Platform              | Platform                 | The fundamental Lightning Platform                                  | 08/04/2024, 2:29 pm | Classic   | ✓         |

## Milestone 07: Fields And Relationship

### Creation Of Fields For The Dispatch/Tracking Object

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select **Dispatch/Tracking**
4. Select **Fields & Relationships** from the left navigation
5. Click **New**
6. Select the **Text** as the Data Type, click **Next**.
7. For Field Label, enter **Tracking ID & length = 40**.
8. Click **Next**, **Next**, then **Save & New**.



SETUP > OBJECT MANAGER  
**Dispatch/Tracking**

Fields & Relationships  
5 Items, Sorted by Field Label

| FIELD LABEL      | FIELD NAME       | DATA TYPE                  | CONTROLLING FIELD | INDEXED |
|------------------|------------------|----------------------------|-------------------|---------|
| Created By       | CreatedById      | Lookup(User)               |                   |         |
| Label and Format | Name             | Auto Number                |                   | ✓       |
| Last Modified By | LastModifiedById | Lookup(User)               |                   |         |
| Sales order      | Sales_order__c   | Master-Detail(Sales order) |                   | ✓       |
| Tracking ID      | Tracking_ID__c   | Text(40)                   |                   |         |

## Milestone – 08 : Create A Pick-List Field On Sales Order

1. From Setup, click Object Manager and select Sales order.
2. Click Fields & Relationships, then New.
3. Select **Picklist** as the Data Type and click Next.
4. For Field Label enter **Status**
5. Select Enter values, with each value separated by a new line and enter these values:
6. **Open**
7. **Hold**
8. **Shipped**
9. **Returned**
10. Click Next, Next, then Save & New.



SETUP > OBJECT MANAGER  
**Sales order**

Details

**Fields & Relationships**  
10 Items, Sorted by Field Label

Quick Find: [ ] New Deleted Fields Field Dependencies Set History Tracking

| FIELD LABEL        | FIELD NAME         | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|--------------------|--------------------|--------------------|-------------------|---------|
| Contact            | Contact__c         | Lookup(Contact)    |                   | ✓       |
| Created By         | CreatedById        | Lookup(User)       |                   |         |
| Customer           | Customer__c        | Lookup(Account)    |                   | ✓       |
| Email              | Email__c           | Email              |                   |         |
| Last Modified By   | LastModifiedById   | Lookup(User)       |                   |         |
| Order confirmed    | Order_confirmed__c | Picklist           |                   |         |
| Order date         | Order_date__c      | Date               |                   |         |
| Owner              | OwnerId            | Lookup(User,Group) |                   | ✓       |
| Sales order Number | Name               | Auto Number        |                   | ✓       |

## Cross-Object Formula Field

A cross-object formula field is basically a formula field.

A cross-object formula can reference merge fields from a master (“parent”) object if an object is on the detail side of a master-detail relationship.

A cross-object formula works with Lookup relationships as well as in Master detail relationship. You can reference fields from objects that are up to 10 relationships away.

### Creation of cross object formula field-

1. Select your object from object selection has Contact.
2. And select the option fields and relationships.
3. At the top right side you can find a new select that option.
4. Now you have to select data type as **formula**.
5. And you will navigate to enter the details page where you give the field label.
6. And give the label name has Account Website
7. Select formula return type **Text**
8. In the formula field enter this formula Account. Website.
9. Click next you will navigate to field level security click on visible checkbox so that it is visible to all profiles.
10. Select the next option, select the page layout and save it.

SETUP > OBJECT MANAGER  
**Contact**

Details

**Fields & Relationships**  
37 Items, Sorted by Field Label

Quick Find

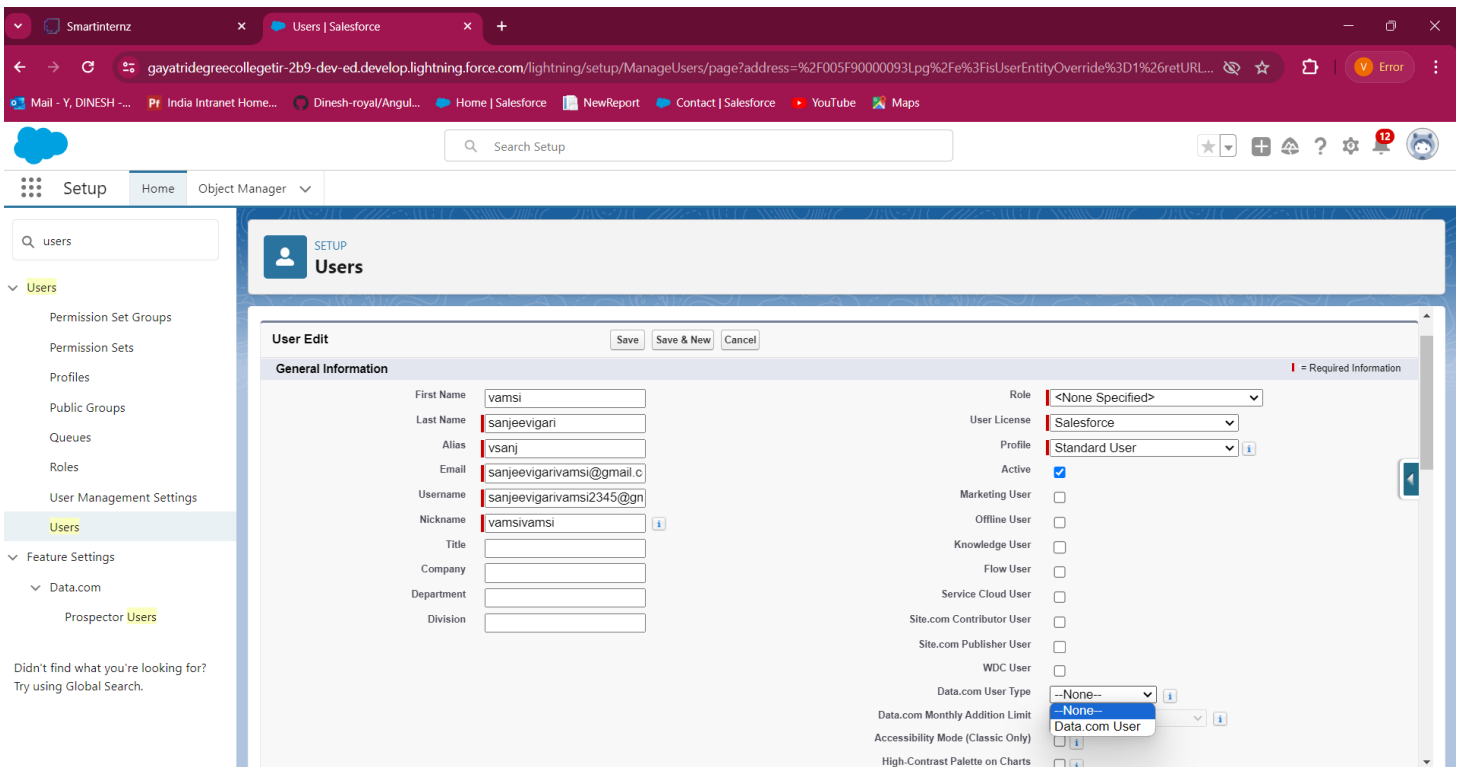
New Deleted Fields Field Dependencies Set History Tracking

|                 |                    |                       |
|-----------------|--------------------|-----------------------|
| Department      | Department         | Text(80)              |
| Description     | Description        | Long Text Area(32000) |
| Do Not Call     | DoNotCall          | Checkbox              |
| Email           | Email              | Email ✓               |
| Email Opt Out   | HasOptedOutOfEmail | Checkbox              |
| Fax             | Fax                | Fax                   |
| Fax Opt Out     | HasOptedOutOfFax   | Checkbox              |
| Gender Identity | GenderIdentity     | Picklist ▼            |
| Home Phone      | HomePhone          | Phone                 |
| Individual      | IndividualId       | Lookup(Individual) ✓  |
| Languages       | Languages__c       | Text(100) ▼           |

## Milestone – 09 : User

### Creating A User

1. From Setup, in the Quick Find box, enter Users.
2. Select Users.
3. Click New User.
4. Enter the First Name and Last Name manager and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
5. Select a User License as Salesforce
6. Select Standard User profile.
7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.



## Milestone – 10 : Validation Rules

### Creation Of Validation Rule

1. *Navigate to object manager and select Account object.*
2. *In details section scroll down and find validation rule in it*
3. *Click new, give the label name and in edit error conditional formula give the formula - LEFT(Phone, 1) <> "+" .*
4. *And in error message give the description has Phone number must begin with + (country code).*
5. *In error location select field.*
6. *Save*

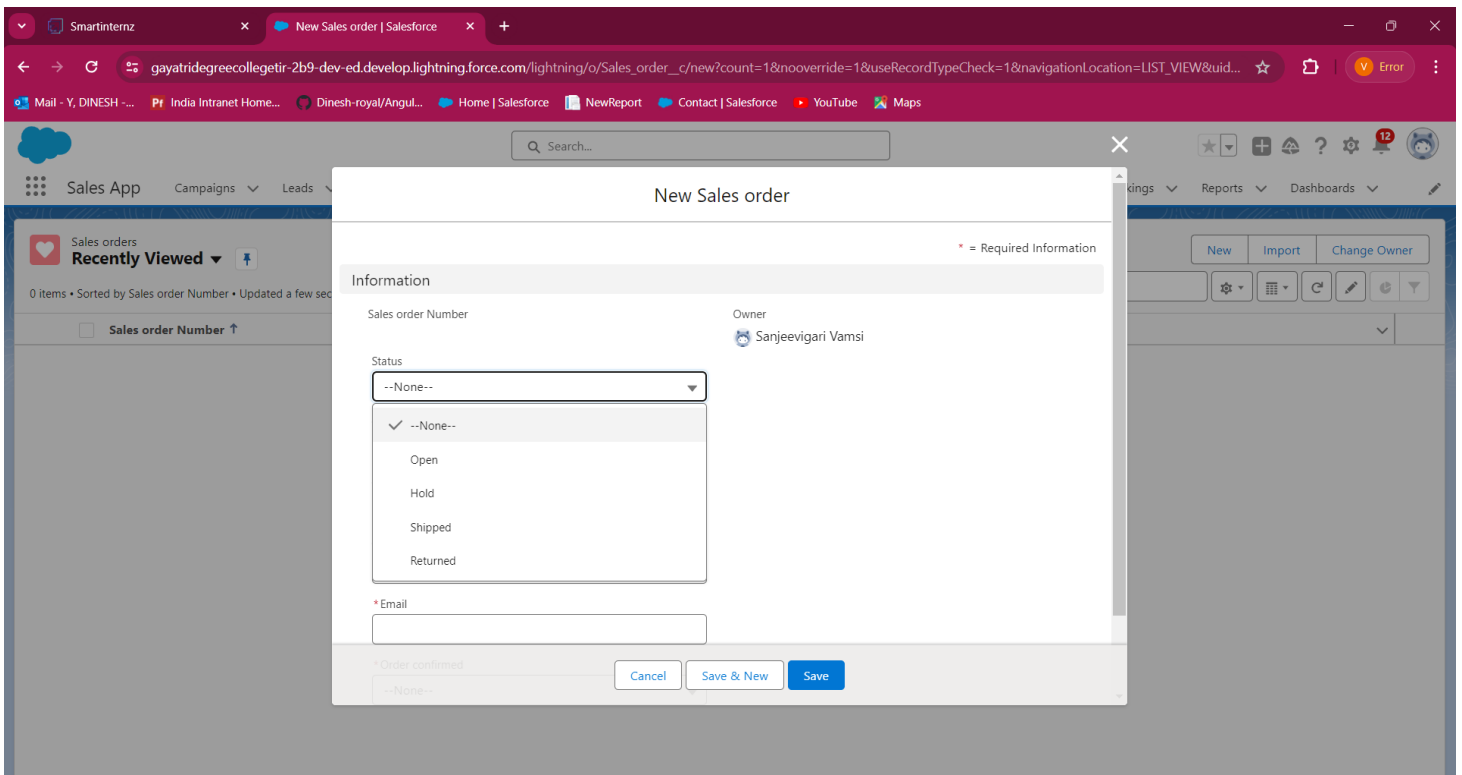
The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Validation Rules' and shows '1 Items, Sorted by Rule Name'. A table lists the validation rules:

| RULE NAME                            | ERROR LOCATION | ERROR MESSAGE                                  | ACTIVE | MODIFIED BY                             |
|--------------------------------------|----------------|--|--------|---|
| Phone_number_has_conditional_formula | Phone          | Phone number must begin with + (country code). | ✓      | Sanjeevigari Vamsi, 10/04/2024, 3:03 pm |

A 'New' button is located in the top right corner of the Validation Rules section.

## Milestone – 11 : Create Record (Sales Order)

1. Click on App Launcher on left side of screen.
2. Search Sales App & click on it.
3. Click on Sales Order tab.
4. Click new button
5. Fill all Sales Order record details.
6. Click on Save Button



## Milestone – 12 : REPORT

### Create Report

1. Click App Launcher and
2. Select Sales App
3. Click reports tab
4. Click New Report.
5. Click the report type as Sales order with customer Click Start report.
6. Customize your report, in group rows select - Customer Account Name
7. Click refresh
8. Click save and run

The screenshot shows the Salesforce Reports page. The top navigation bar includes the 'Sales App' and various tabs like Campaigns, Leads, Accounts, Home, Contacts, Opportunities, Products, Warehouses, Sales orders, Dispatch/Trackings, Reports, and Dashboards. The 'Reports' tab is active, displaying a list of recent reports.

| REPORTS       | Report Name                           | Description   | Folder          | Created By         | Created On         | Subscribed |
|---------------|---------------------------------------|---|-----------------|--------------------|--------------------|------------|
| Recent        | Sample Flow Report: Screen Flows      | Which flows run, what's the status of each interview, and how long do users take to complete the screens? | Public Reports  | Automated Process  | 8/4/2024, 2:29 pm  |            |
| Created by Me | New Sales orders with Customer Report |   | Private Reports | Sanjeevigari Vamsi | 11/4/2024, 5:44 am |            |

The left sidebar contains sections for 'REPORTS' (Recent, Created by Me, Private Reports, Public Reports, All Reports), 'FOLDERS' (All Folders, Created by Me, Shared with Me), and 'FAVORITES' (All Favorites). A 'Show hidden icons' button is visible at the bottom right of the sidebar.

## Milestone – 12 : Dashboards

### Create Dashboard

1. Click on Dashboards tab from the “Sales App” application,
2. Click on new dashboard
3. Give name- Sales App Dashboard
4. Click create
5. Give your dashboard a name and click on +component.
6. Select the New Sales orders with Customer Report which you created.
7. For the data visualization select any of the chart, table etc as your wish.
8. Click add
9. Click save

The screenshot shows the Salesforce Dashboards interface. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The main navigation menu on the left lists 'Sales App', 'Campaigns', 'Leads', 'Accounts', 'Home', 'Contacts', 'Opportunities', 'Products', 'Warehouses', 'Sales orders', 'Dispatch/Trackings', 'Reports', and 'Dashboards'. The 'Dashboards' section is active, displaying a 'Recent' list of two dashboards.

| DASHBOARDS | Dashboard Name       | Description   | Folder                          | Created By         | Created On         | Subscribed |
|------------|----------------------|---|---------------------------------|--------------------|--------------------|------------|
| Recent     | Enablement Dashboard | View data on how Enablement helps drive your business outcomes. This is your main dashboard for all Enablement analytics. Don't delete it. If you want to make changes to this dashboard, duplicate it. | Enablement Dashboard Spring '24 | Automated Process  | 8/4/2024, 2:29 pm  |            |
|            | Sales App Dashboard  |   | Private Dashboards              | Sanjeevigari Vamsi | 11/4/2024, 5:47 am |            |

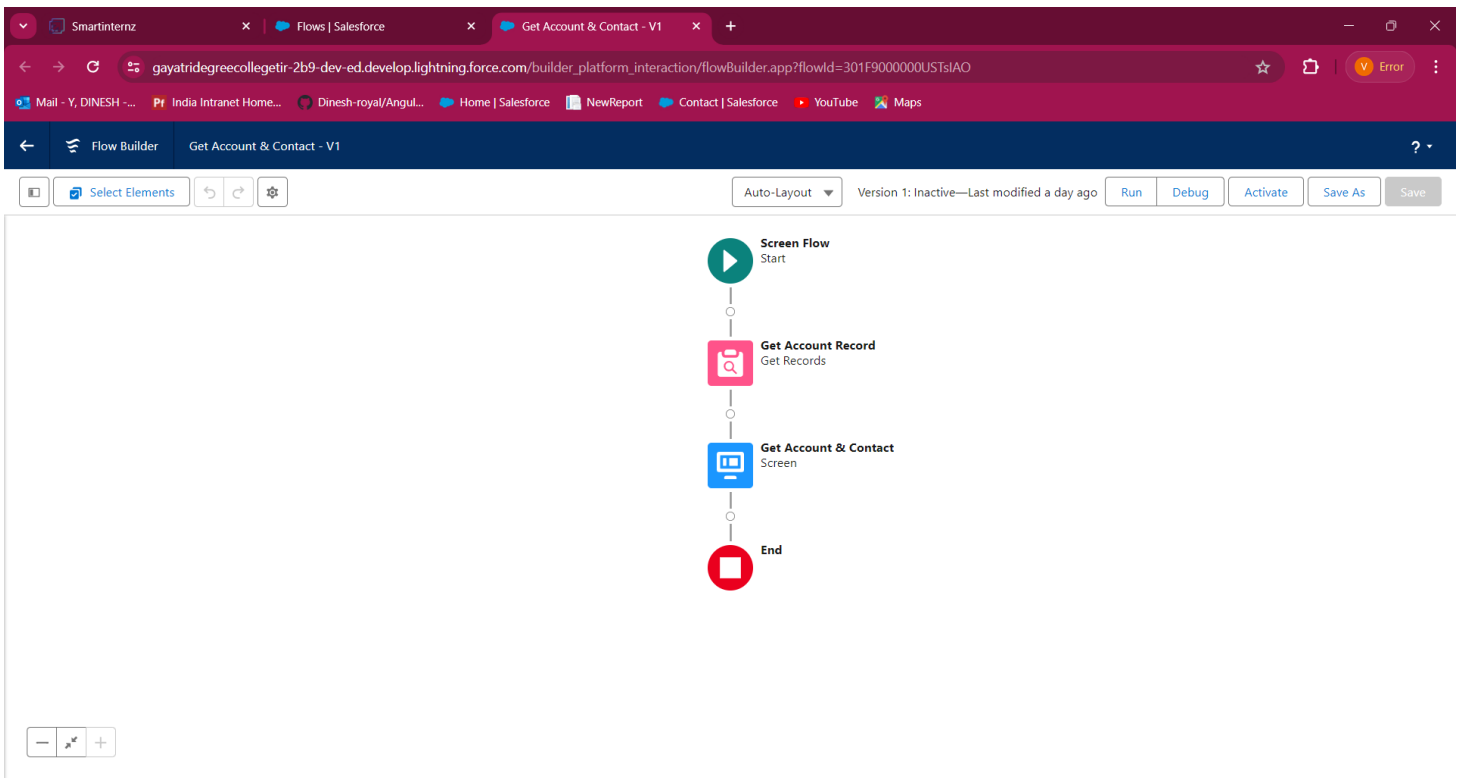
## Milestone – 13 : *Flows*

### Create Flow

*Left side corner of the page you can find a toggle click on that and select a new resource*

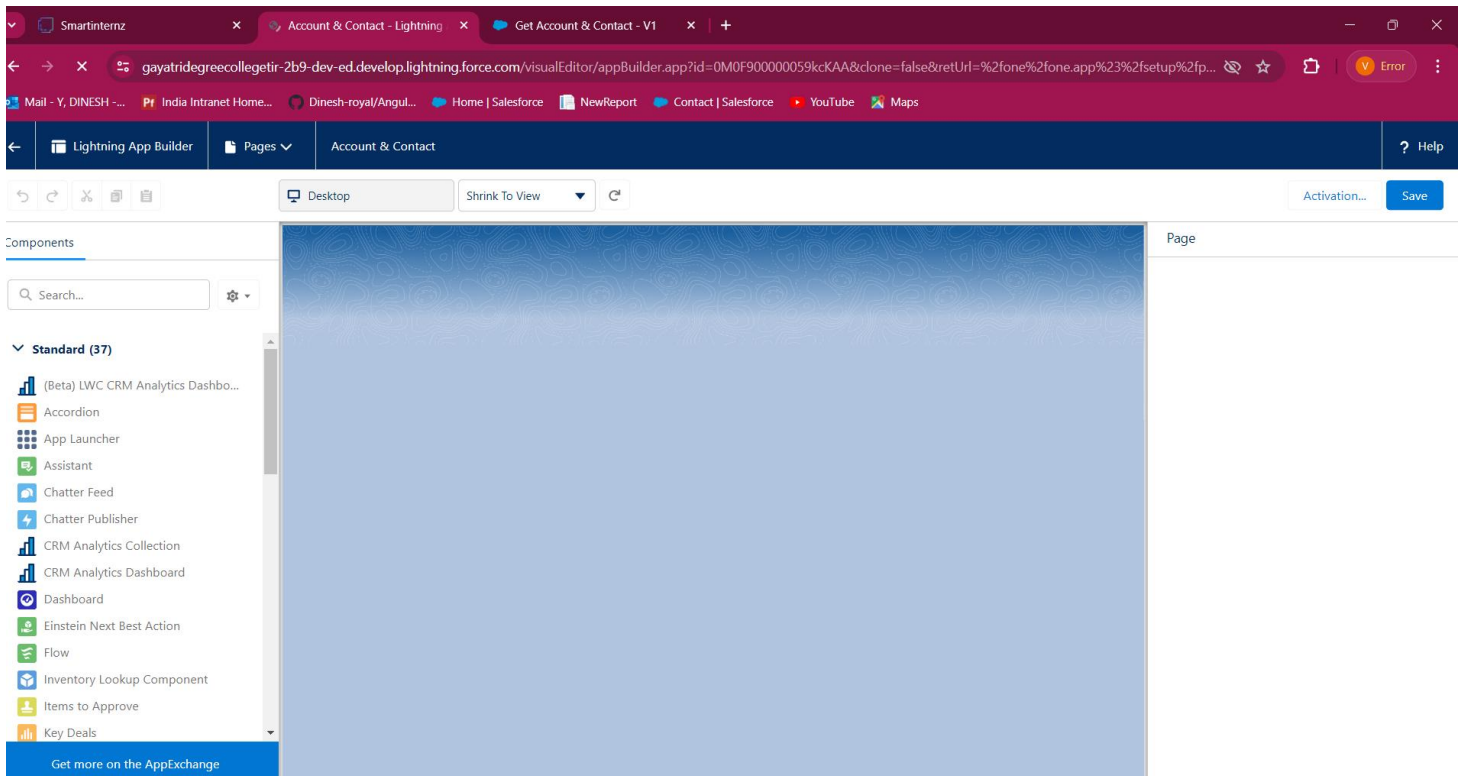
- 2. and select resource type has variable*
- 3. Give api name as Recordid*
- 4. and select data type as Text*
- 5. At bottom for Availability outside the flow check the box as Available for Input*
- 6. Click on done*





## To Create Lightning Home Page

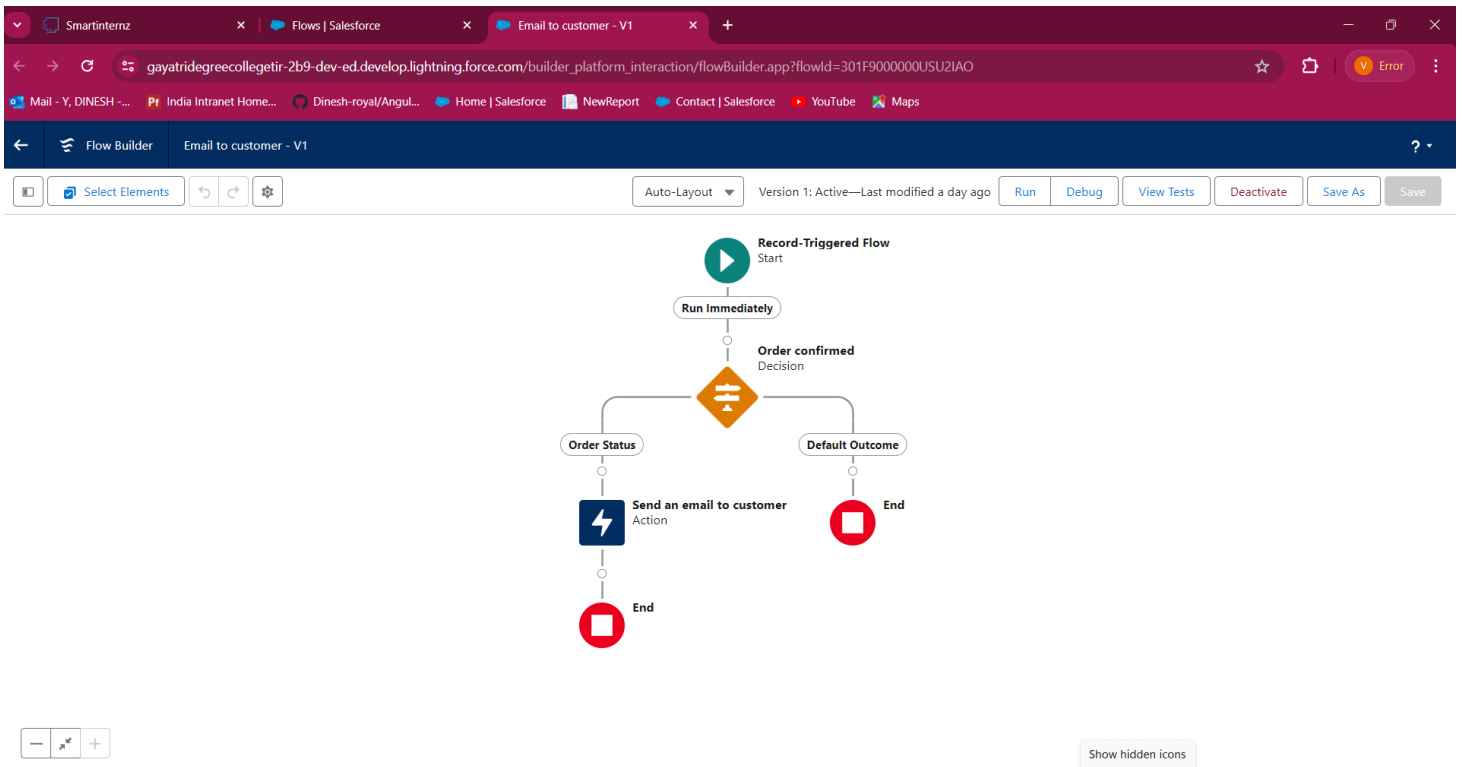
1. Click on setup gear.
2. Now search for lightning App builder.
3. And select New option
4. In create a new lightning page select Home page.
5. Select Next
6. Give the label name - Account & Contact
7. Choose a standard home page.
8. Now in the component section select flow and drag down it to Corner of the page.
9. At the right side select the flow Get Account & Contact
10. at the right side top of the page click on Save.
11. You will get the populate notification and click on activate.
12. you will get an activation pop up select App and profile.
13. Select Sales app in lightning app selection.
14. In profiles select System administrator, Standard user, Standard platform user.
15. Save it.



## To Create Record Trigger Flow

To create record triggered flow

1. Click on setup and search for flows
2. Than click on new flow
3. Select Record Trigger flow as your flow
4. In Object search for Sales order
5. In Configure Trigger select A record is created
6. In set entry conditions All conditions are Met
7. In fields search for Order confirmed
8. Operator - Equals
9. In values select - Yes
10. In optimize the flow for Select Action and related Record
11. In Outcome Details Label as Order Status
12. In condition requirement All Conditions are Met
13. In resource select \$Record than field as Order confirmed
14. Operator - Equals
15. Value as Yes
16. Click on done



## Milestone – 14 : Triggers

### Trigger On Account To Prevent Duplicate Name

Handler

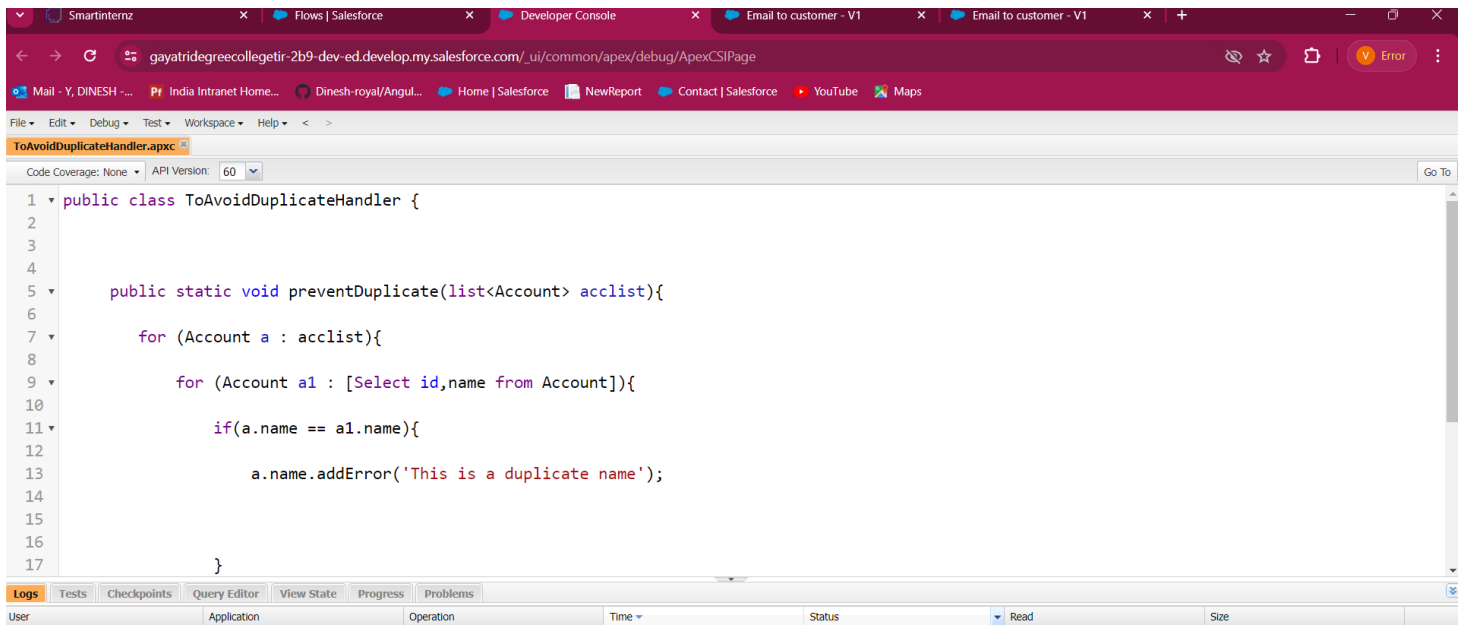
1. Click on Setup and select developer console
2. Click on file and then New
3. Select Apex Class give the name as Toavoidduplicateshandler

```

public class ToAvoidDuplicateHandler {

    public static void preventDuplicate(list<Account> acclist){
        for (Account a : acclist){
            for (Account a1 : [Select id,name from Account]){
                if(a.name == a1.name){
                    a.name.addError('This is a duplicate name');
                }
            }
        }
    }
}
  
```

}



## Trigger

1. Click on Setup and select developer console
2. Click on file and then New
3. Select Apex trigger give the name as Toavoidduplicates
4. Subject as Account.

*trigger toavoidduplicates on Account (before insert) {*

```
if(trigger.isBefore){  
    ToAvoidDuplicateHandler.preventDuplicate(trigger.new);  
}
```

}

Smartinternz

Flows | Salesforce

Developer Console

Email to customer - V1

Email to customer - V1

gayatridegreecollegedir-2b9-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage

Mail - Y, DINESH ...India Intranet Home...Dinesh-royal/Angul...Home | SalesforceNewReportContact | SalesforceYouTubeMaps

FileEditDebugTestWorkspaceHelp

toavoidduplicates.apxt

Code Coverage: NoneAPI Version: 60Go To

1trigger toavoidduplicates on Account (before insert) {  
2  
3  
4  
5if(trigger.isBefore){  
6  
7ToAvoidDuplicateHandler.preventDuplicate(trigger.new);  
8  
9}  
10  
11  
12  
13}

LogsTestsCheckpointsQuery EditorView StateProgressProblems

| User | Application | Operation | Time | Status | Read | Size |  |
|------|-------------|-----------|------|--------|------|------|--|
|------|-------------|-----------|------|--------|------|------|--|