

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:

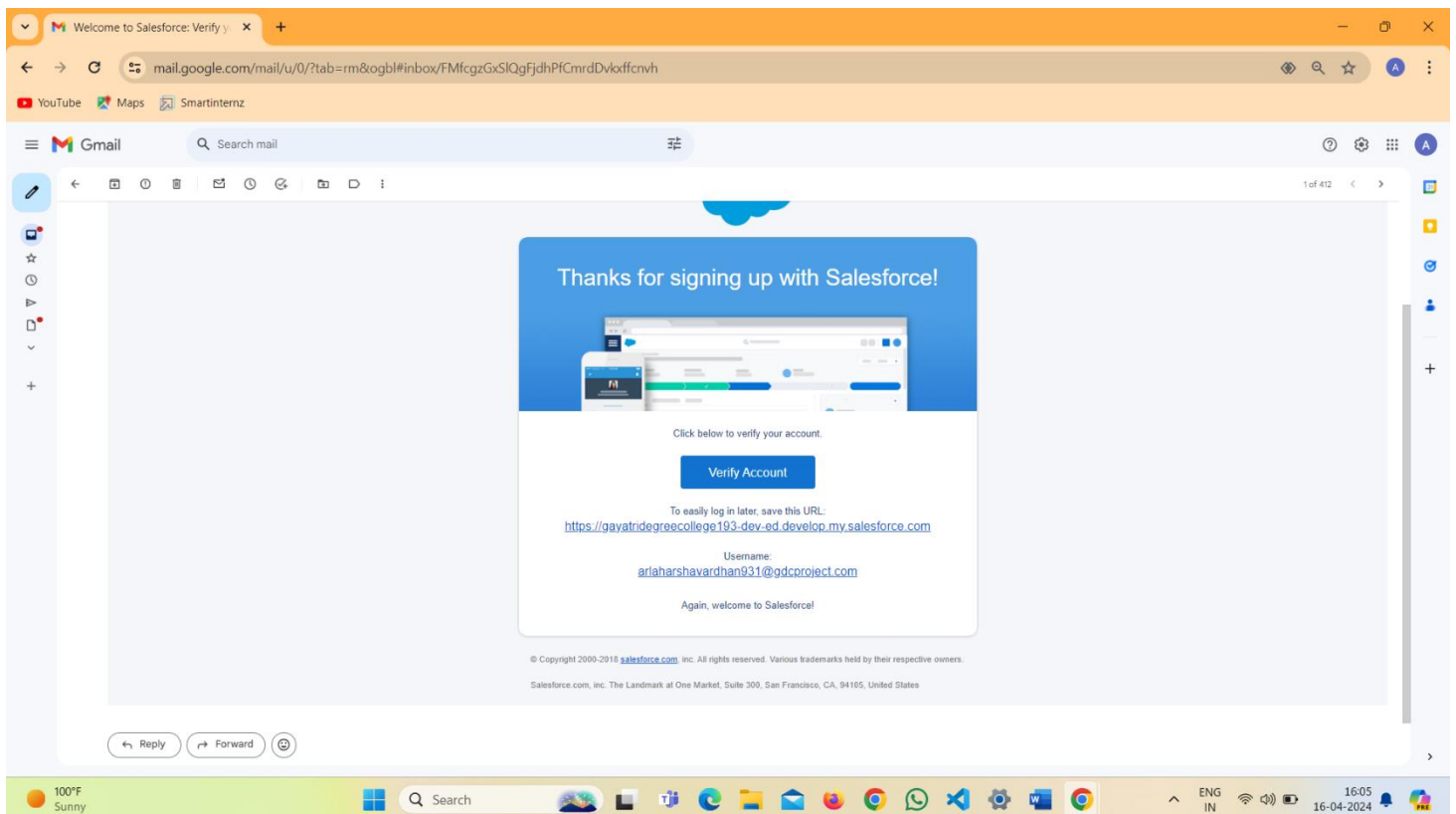
First name & Last name – Arla & HarshaVardhan

1. *Email* – **arlaharshavardhan93@gmail.com**
2. *Role*: **Developer**
3. *Company*: **GAYATRI DEGREE COLLEGE - TIRUPATI**
4. *County*: **India**
5. *Postal Code*: **517501**
6. *Username*: **arlaharshavardhan93@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

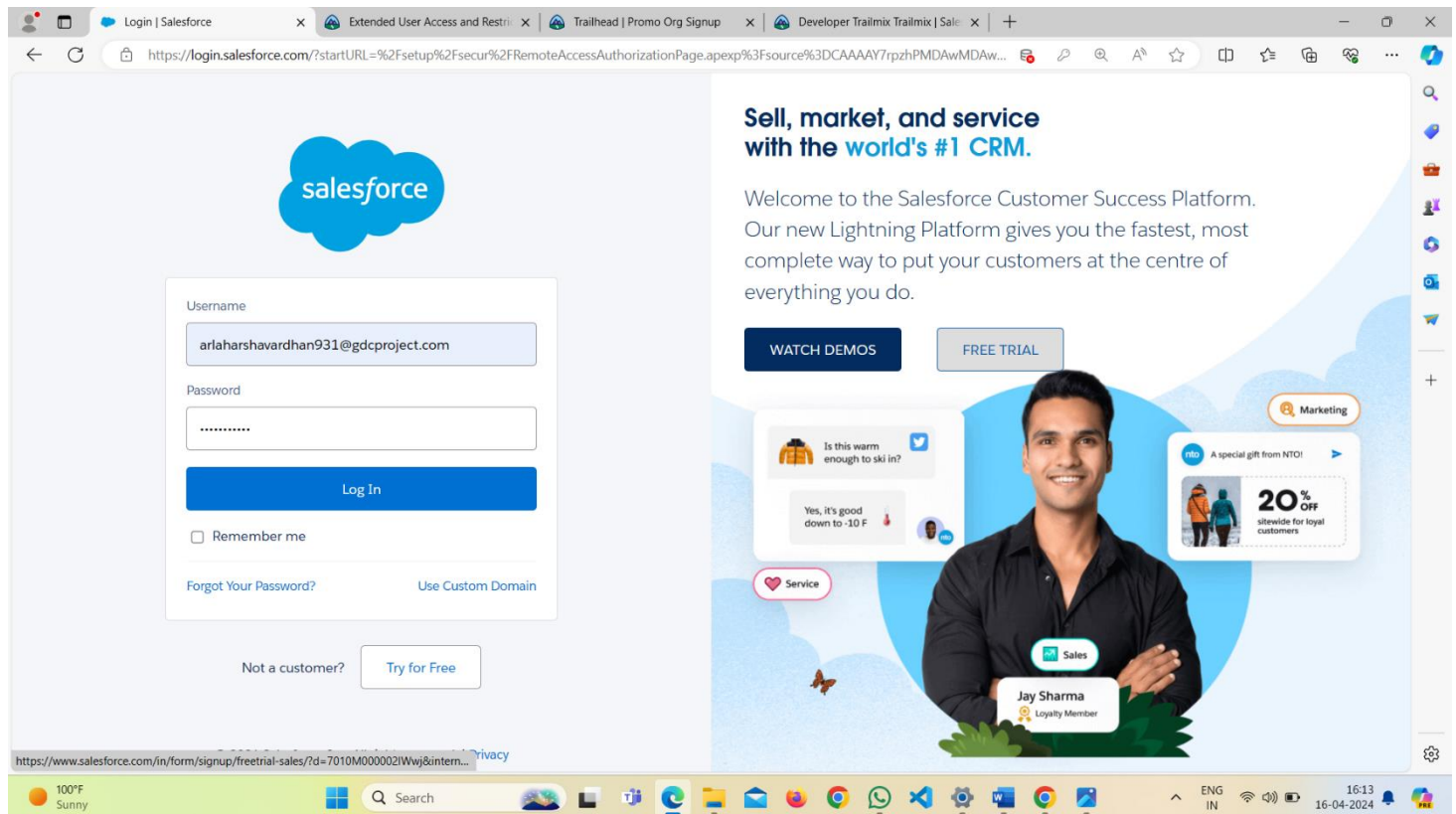


Login to your Salesforce Org

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.

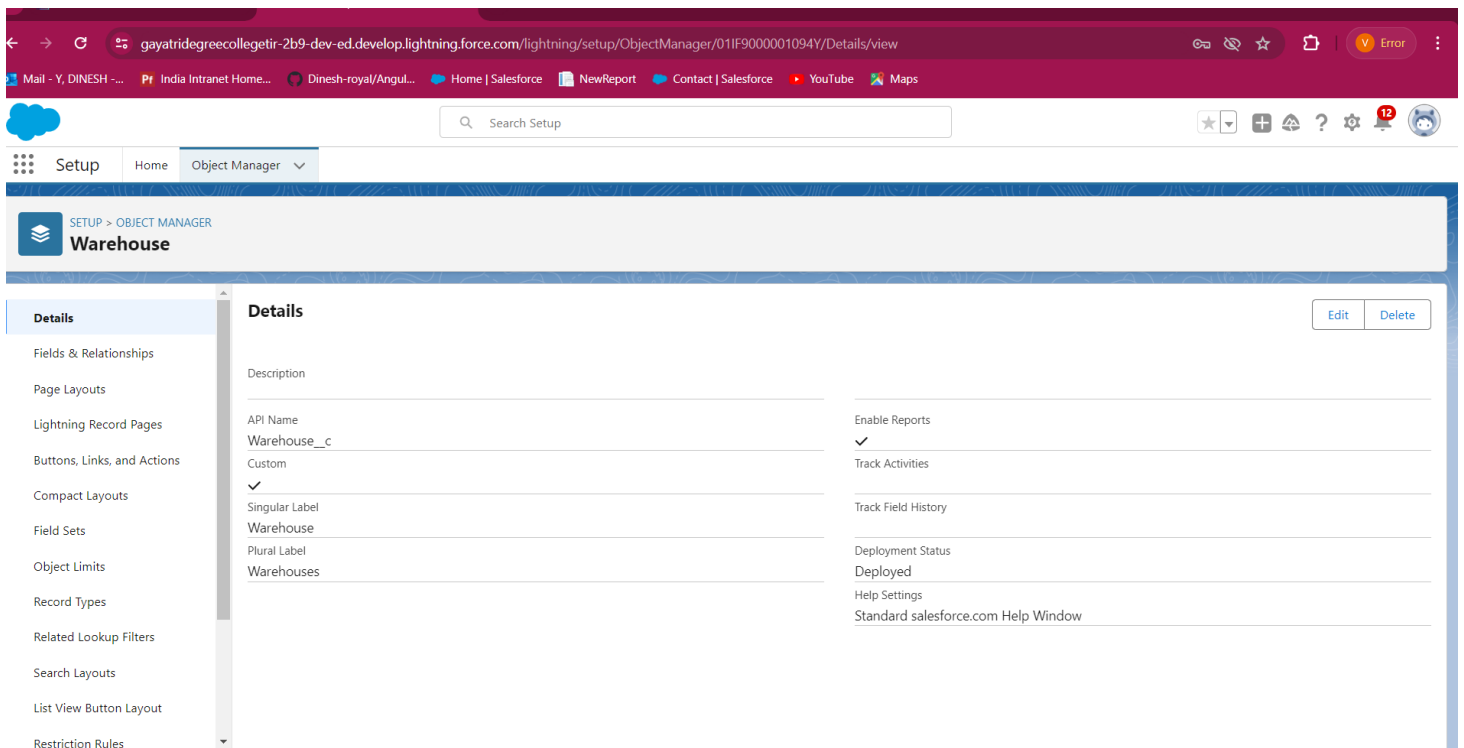
Salesforce Login:

<https://login.salesforce.com>



Milestone - 02 : Creation Of Warehouse Object

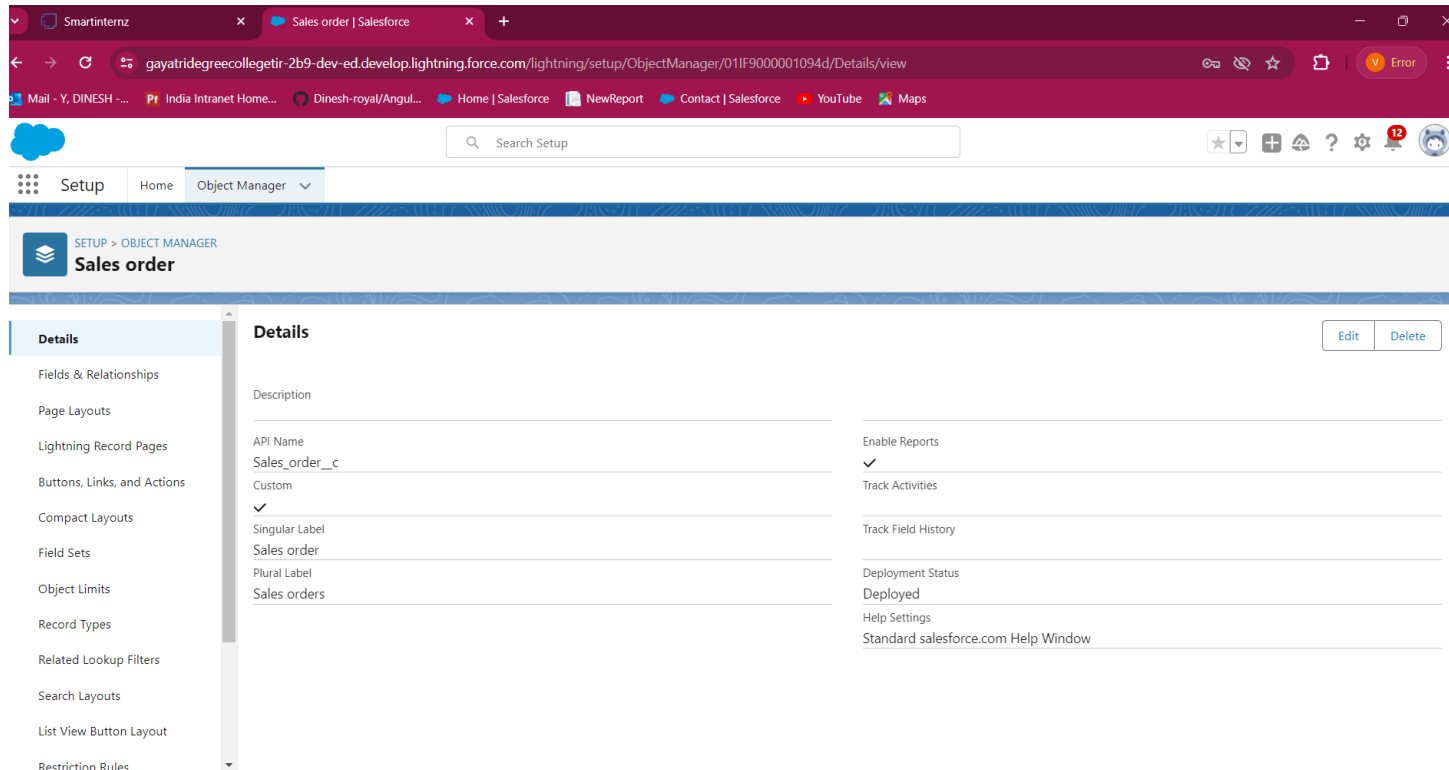
1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as 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

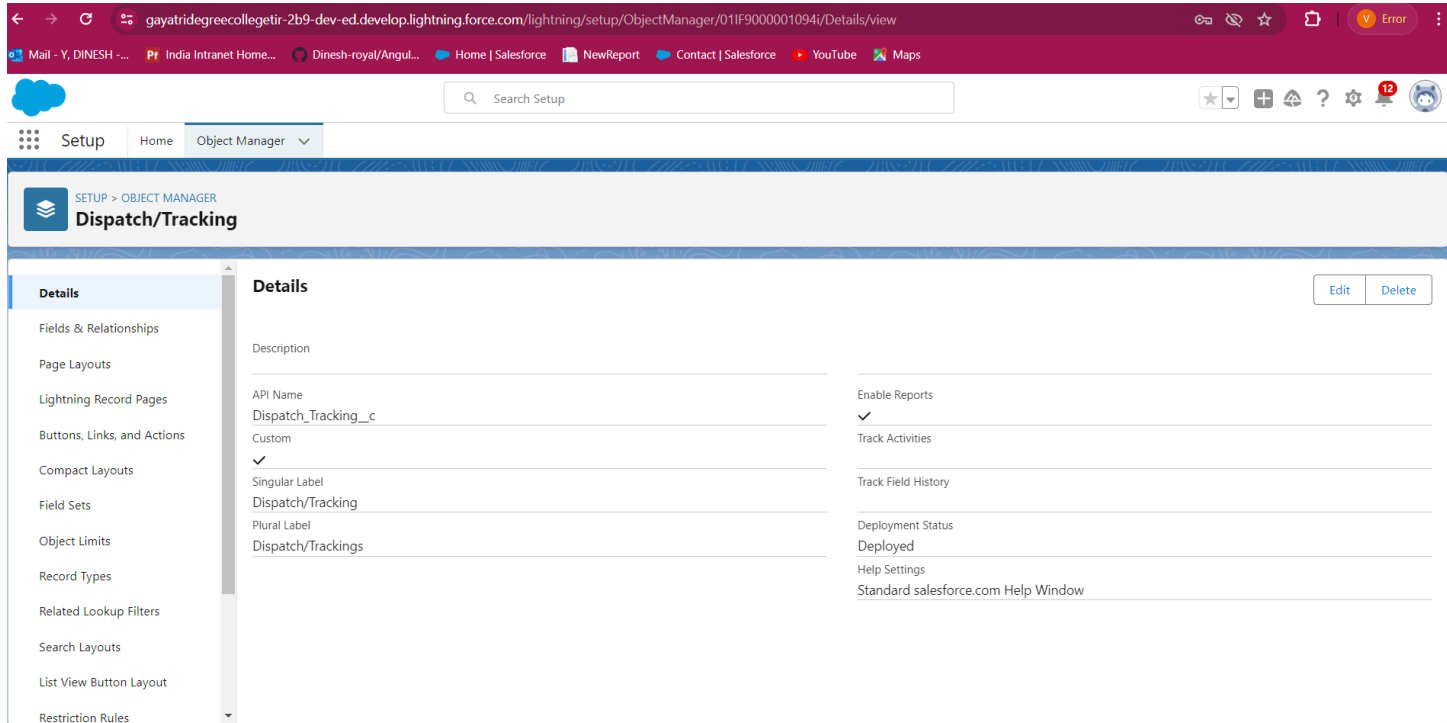
10. Click Save



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.

Action	Label	Tab Style	Description
Edit Del	Dispatch/Trackings	Apple	
Edit Del	Sales orders	Heart	
Edit Del	Warehouses	Airplane	

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

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.

23 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	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	✓	
			Create and manage queues for your business.	08/04/2024, 2:29 pm	Lightning	✓	

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

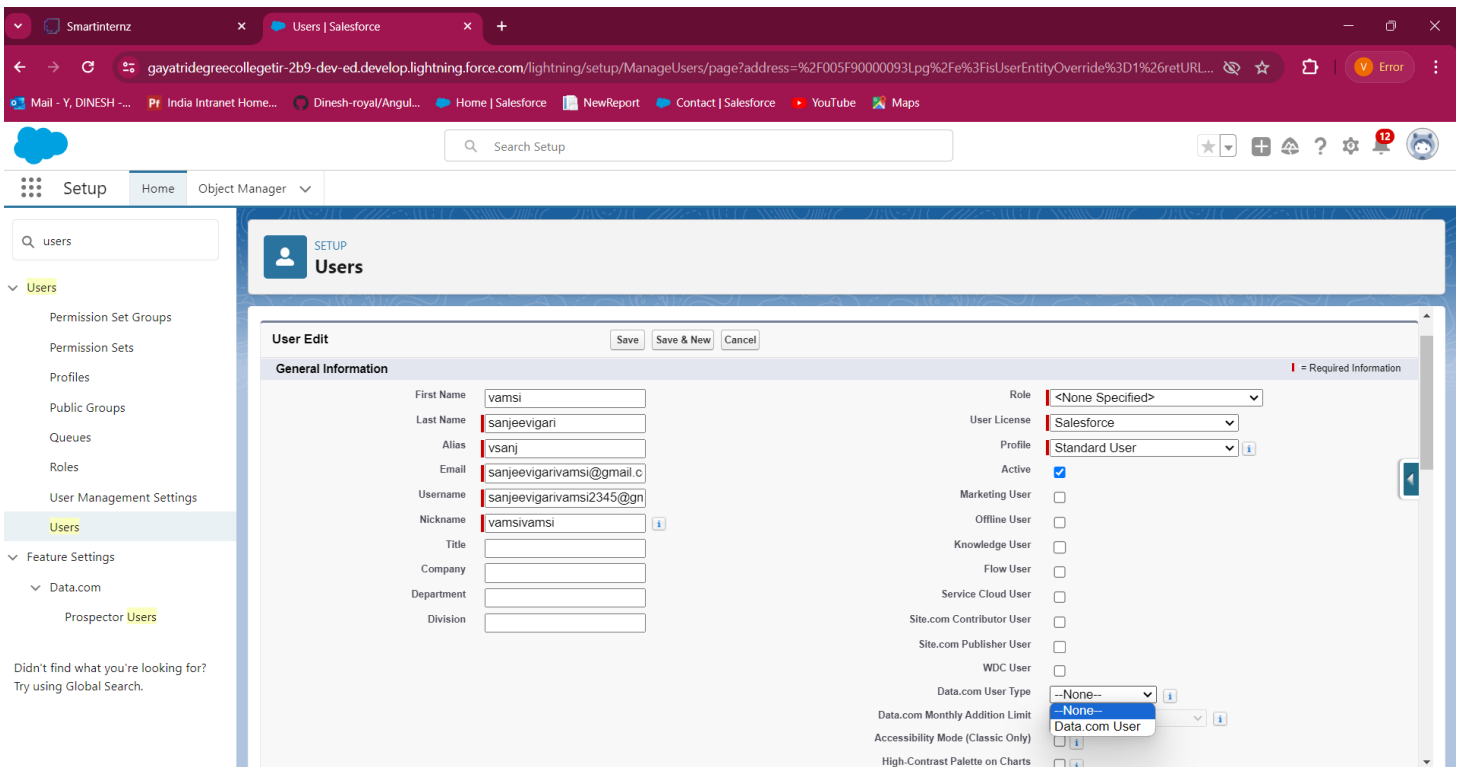
New Deleted Fields Field Dependencies Set History Tracking

Field Label	Field Name	Data Type	Required
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*

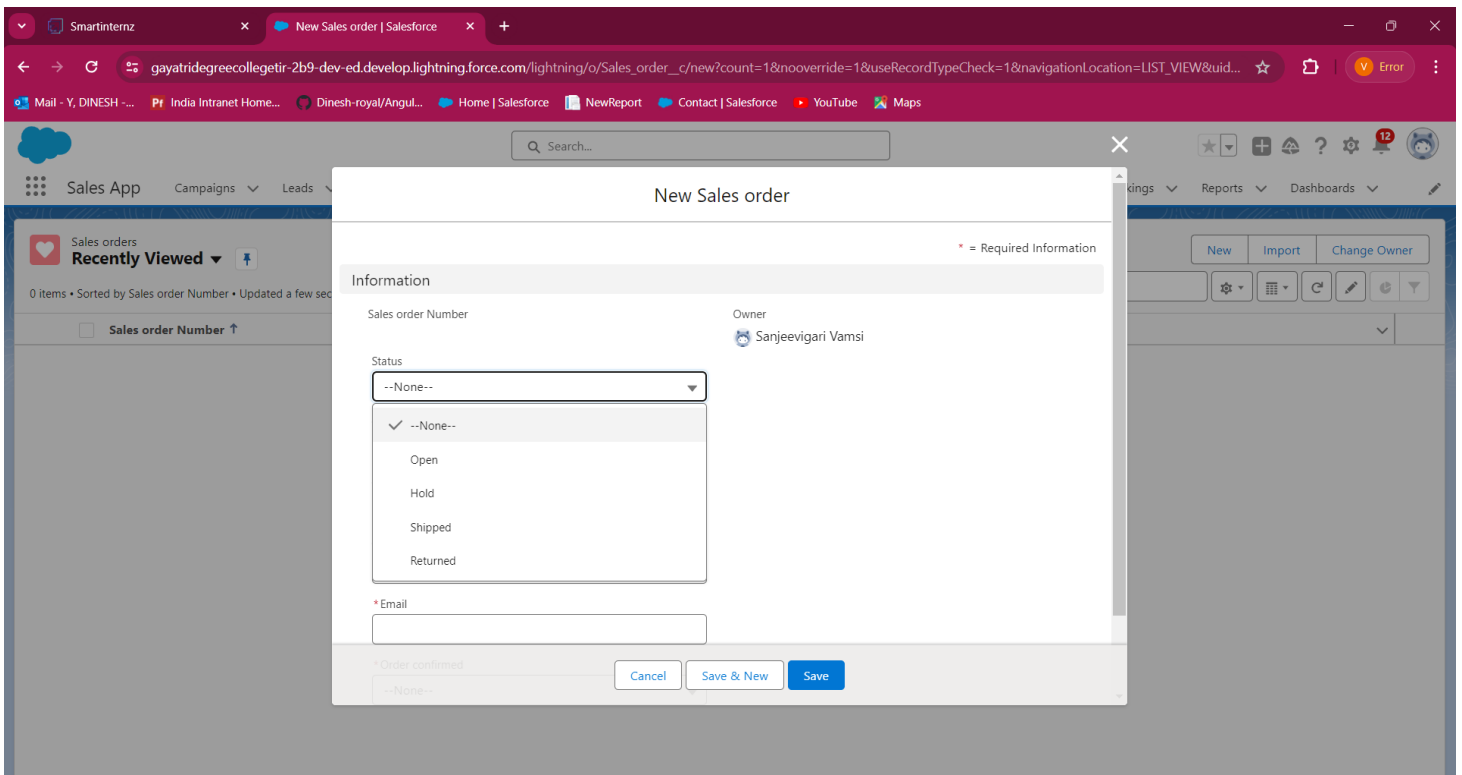
The screenshot shows the Salesforce Setup interface. The browser address bar displays the URL: `gayatridegreecollegitir-2b9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/ValidationRules/view`. The page title is "Account" under the "Object Manager" section. The left sidebar lists various setup categories: 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 left sidebar contains navigation options: Reports, Recent (2 items), FOLDERS (All Folders, Created by Me, Shared with Me), and FAVORITES (All Favorites). The main content area displays a table 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	

At the bottom right of the table area, there is a button labeled "Show hidden icons".

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.

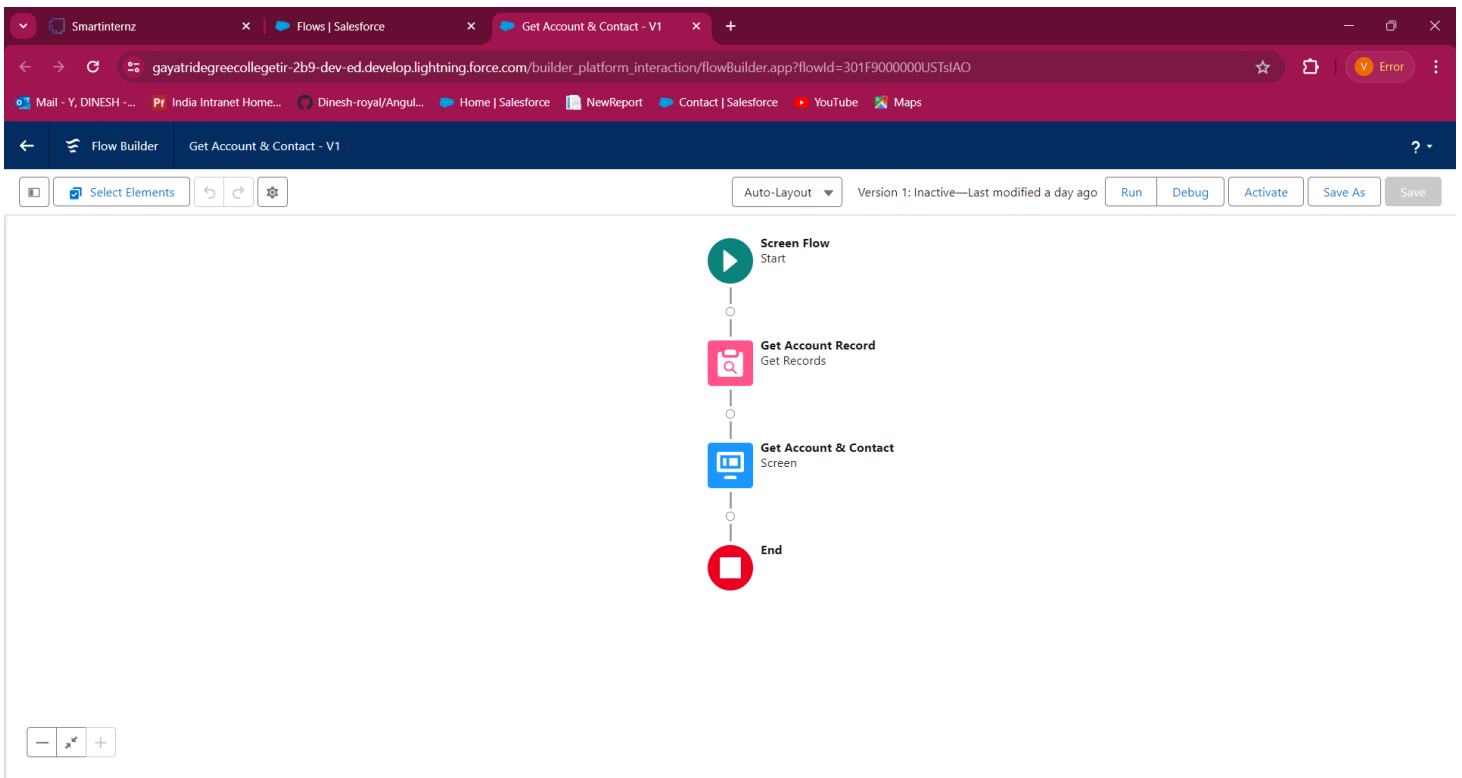
DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Enablement Dashboard	View data on how Enablement helps drive your business outcomes. This is your main dashboard for all Enablement analytics. Don't delete it. If you want to make changes to this dashboard, duplicate 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

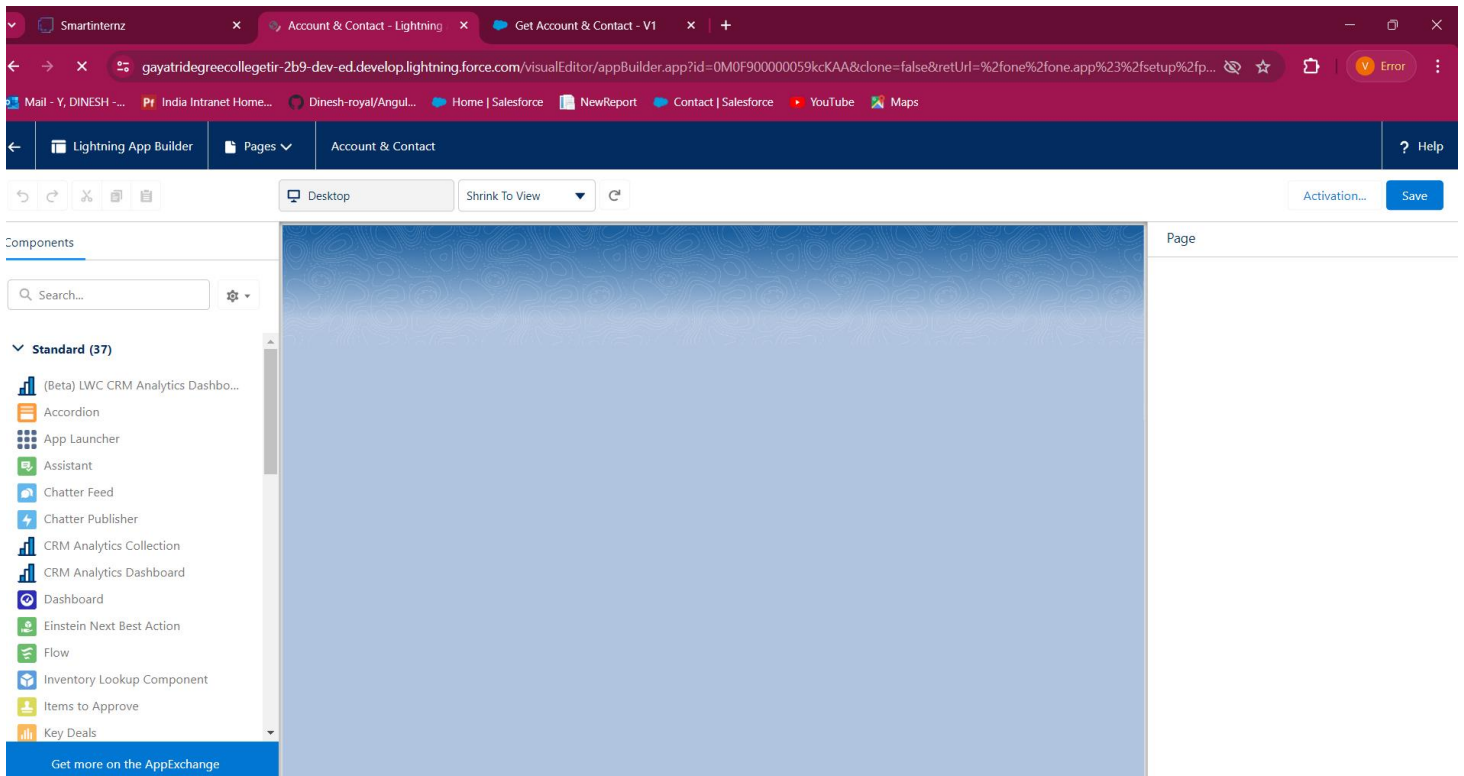
Left side corner of the page you can find a toggle click on that and select a new resource

- 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

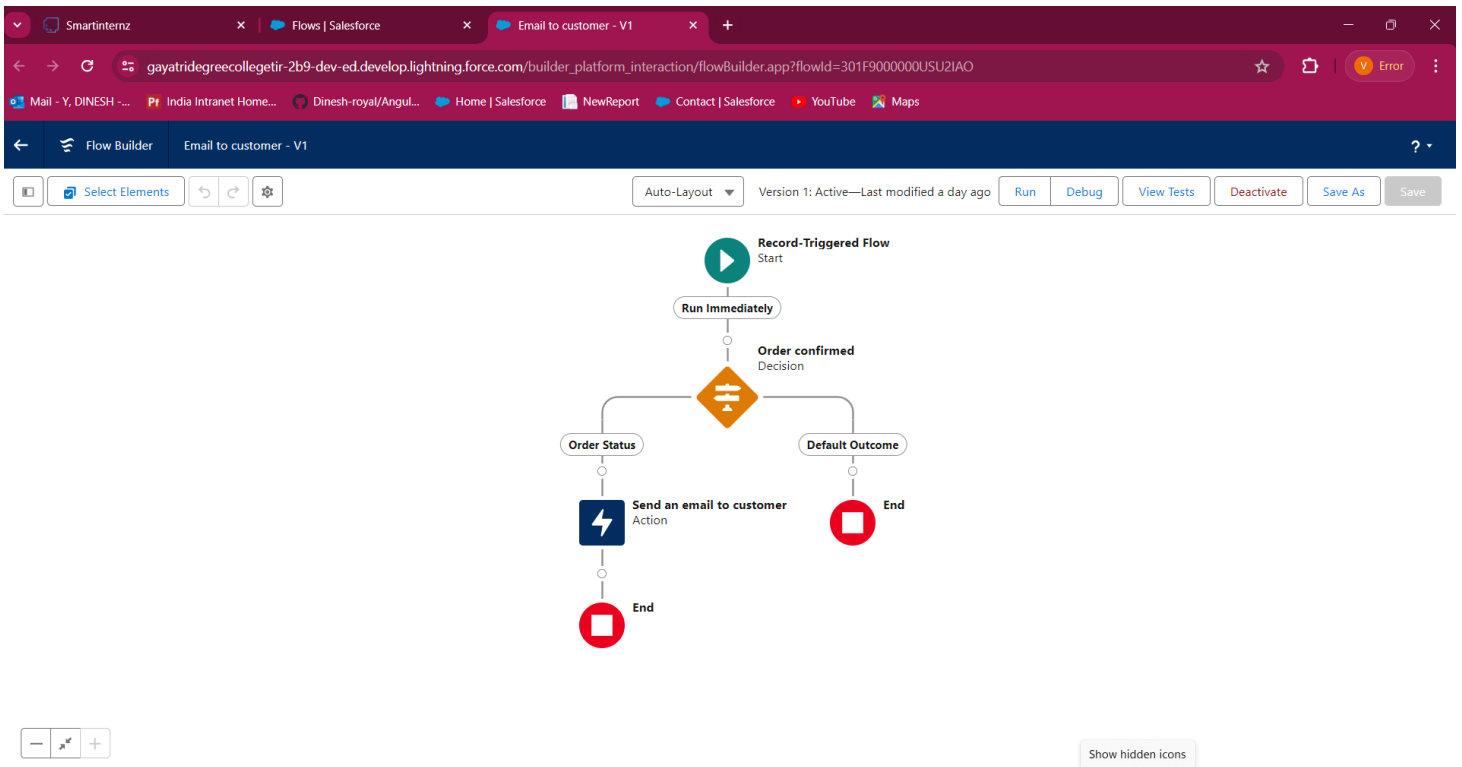
1. Click on setup gear.
2. Now search for lightning App builder.
3. And select New option
4. In create a new lightning page select Home page.
5. Select Next
6. Give the label name - Account & Contact
7. Choose a standard home page.
8. Now in the component section select flow and drag down it to Corner 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

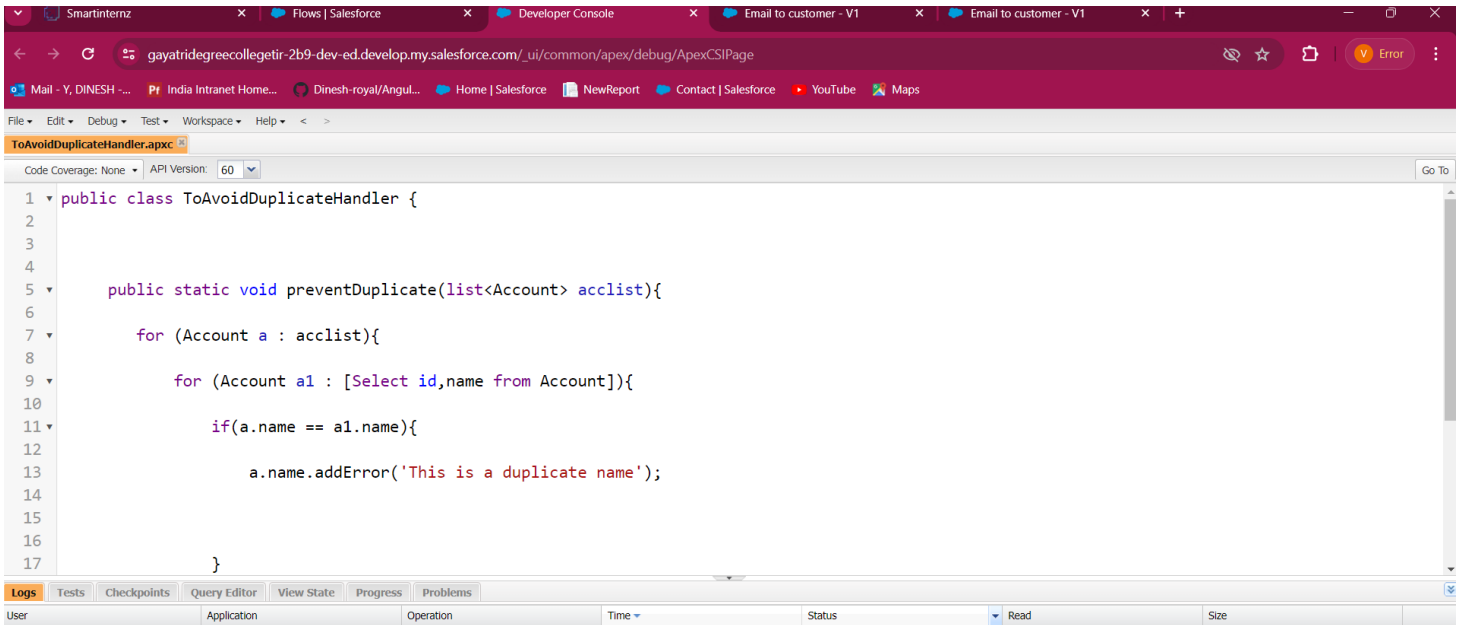
1. Click on Setup and select developer console
2. Click on file and then New
3. Select Apex Class give the name as Toavoidduplicateshandler

```

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
------	-------------	-----------	------	--------	------	------