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:

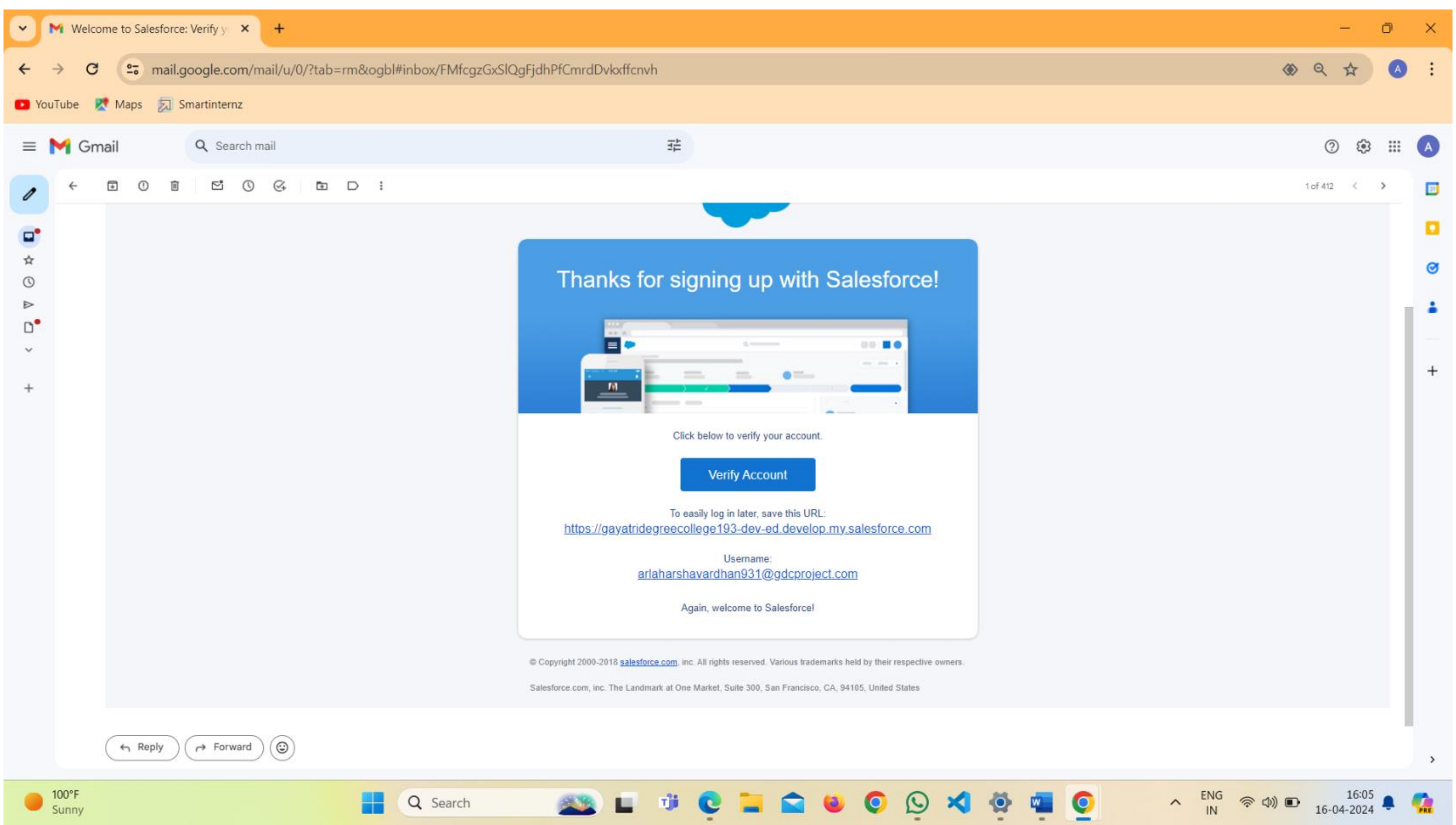
First name & Last name – Arla & HarshaVardhan

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

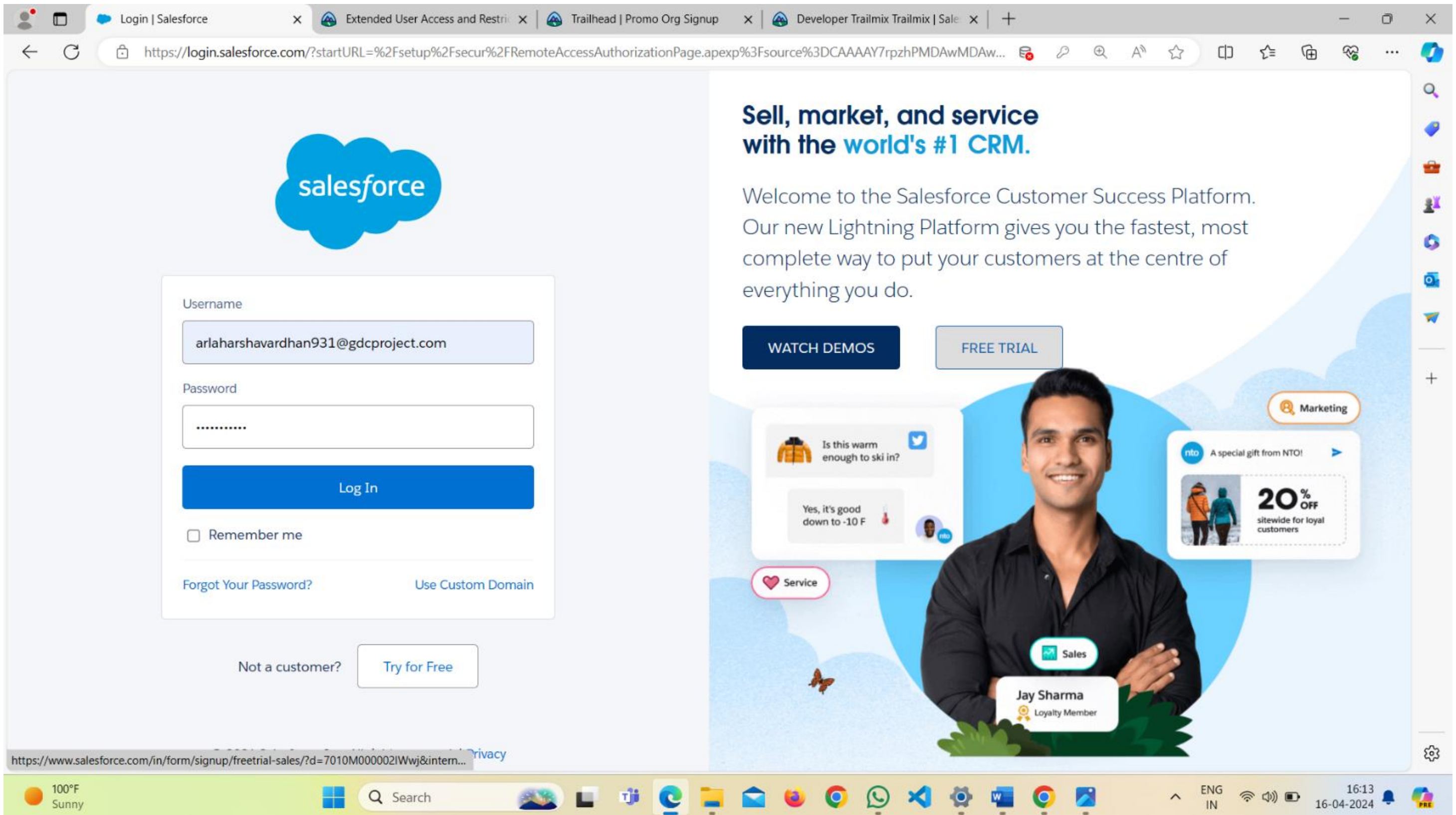


Login to your Salesforce Org

1. *Go to salesforce.com 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.*

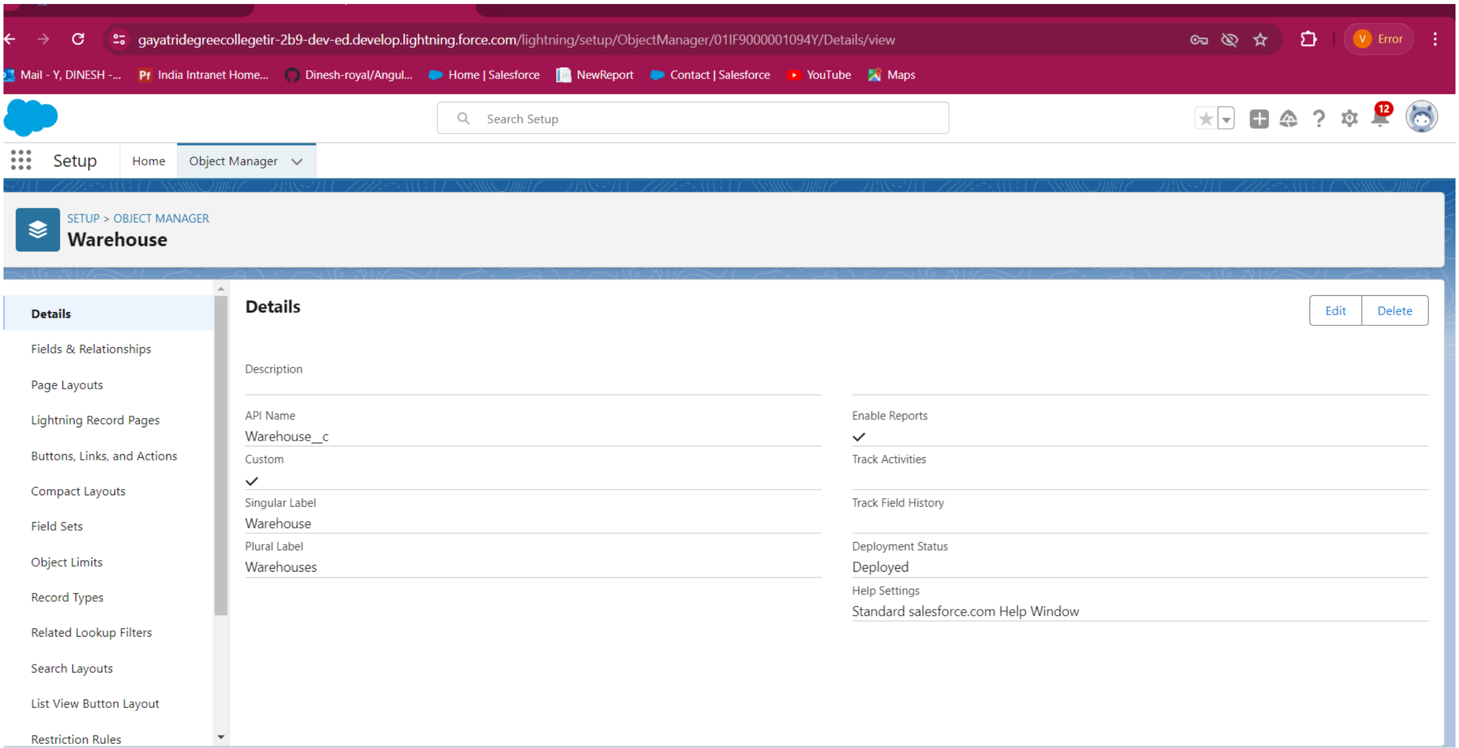
Salesforce Login:

https://login.salesforce.com



Milestone - 02 : Creation Of Warehouse Object

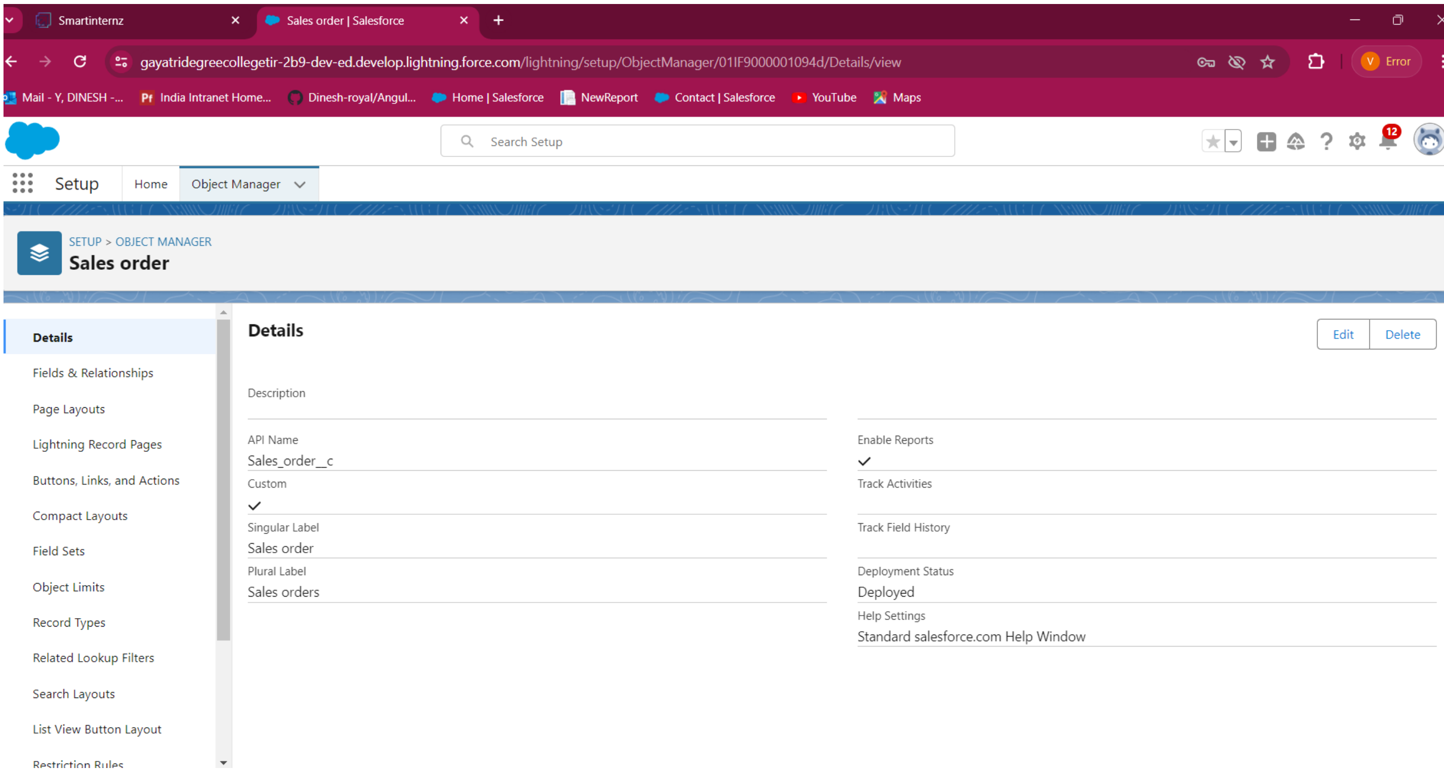
1. *Click on the gear icon and then select Setup.*
2. *Click on the object manager tab just beside the home tab.*
3. *After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.*
4. *On the Custom Object Definition page, create the object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

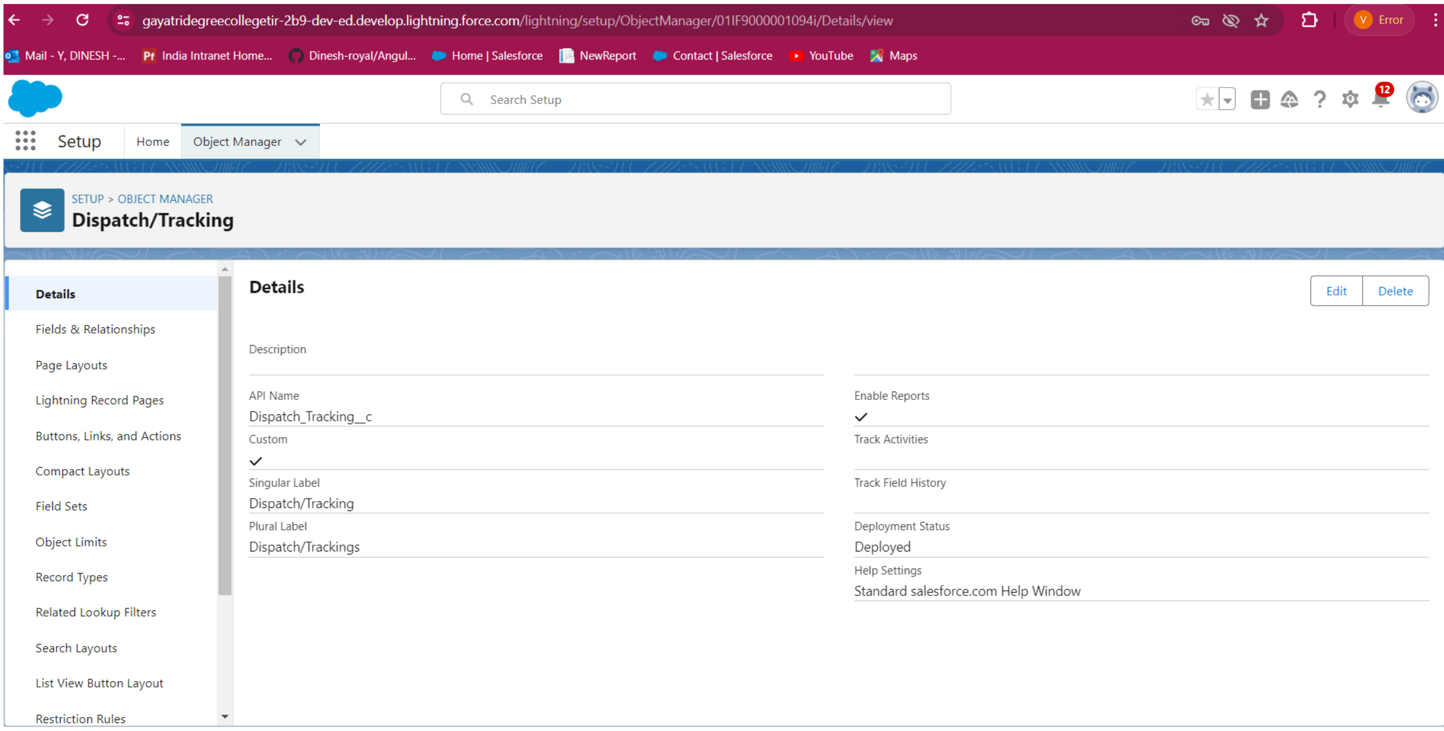
10. *Click Save*



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*

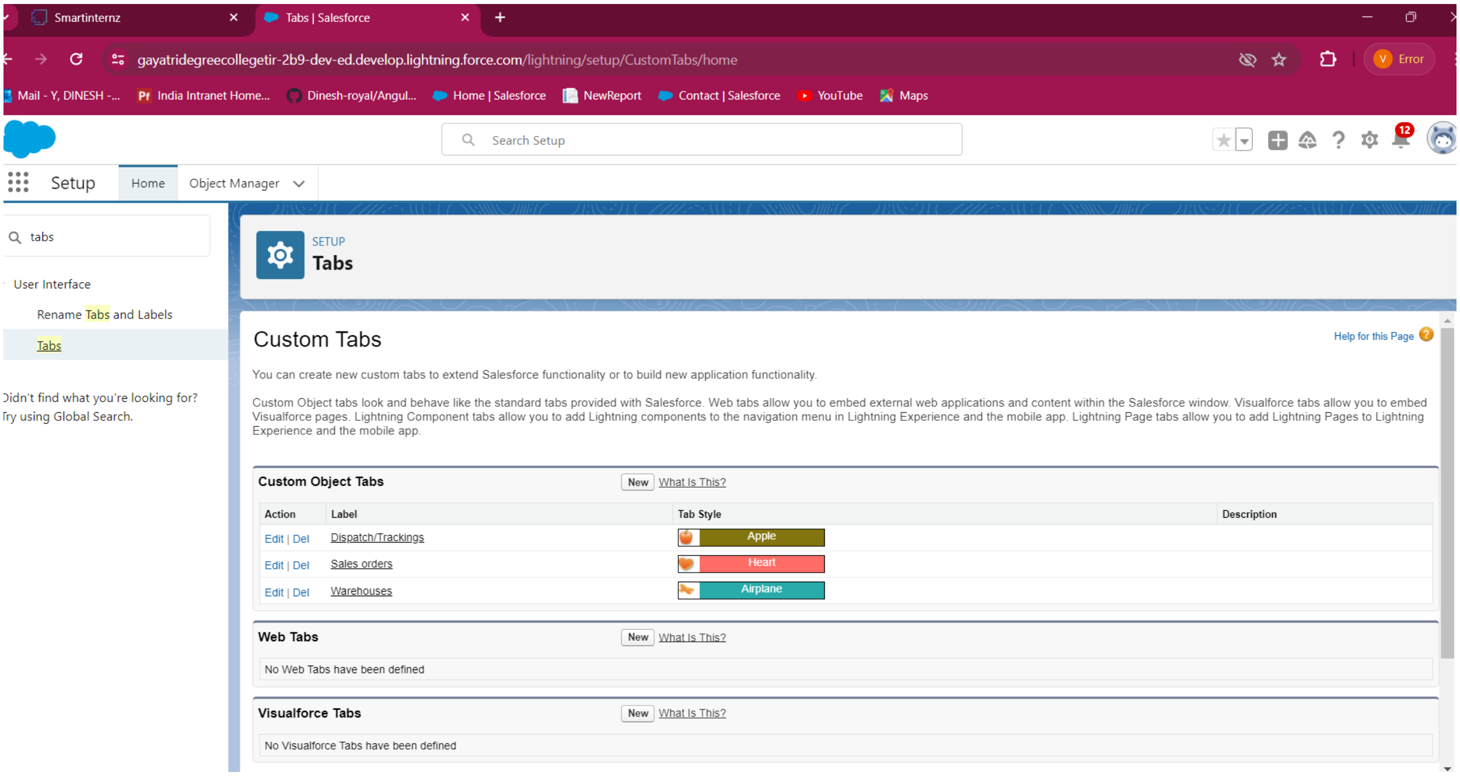


Milestone – 05 : What Is A Tab ?

Create A Tab For Warehouse Object

Now create a custom tab. Click the Home tab.

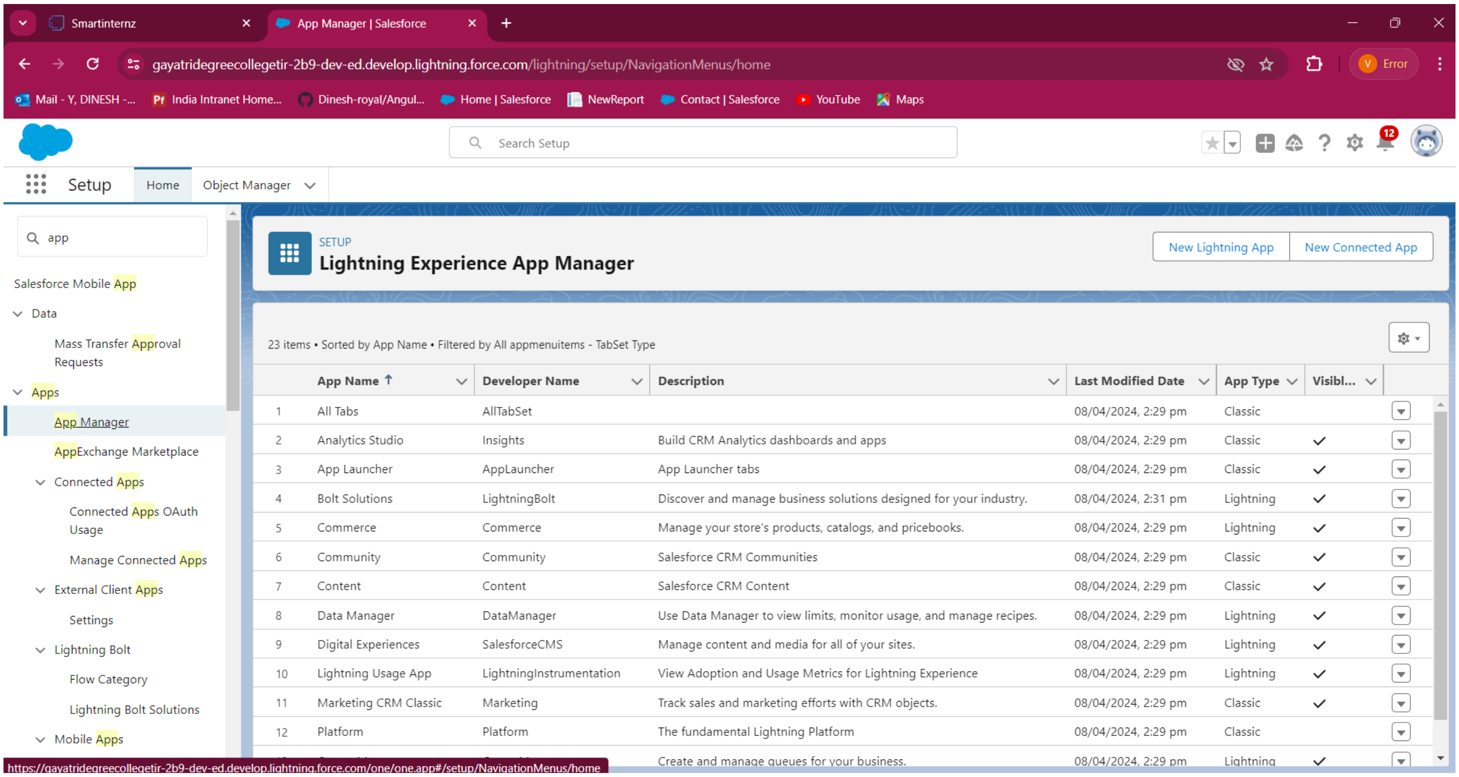
1. *Enter Tabs in Quick Find and select Tabs.*
2. *Under Custom Object Tabs, click New*
3. *For Object, select **Warehouse.***
4. *For Tab Style, select any icon*
5. *Leave all defaults as is. Click Next, Next, and Save*
6. *In the same way create Tabs for all Custom Objects –* **Sales order, Dispatch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



Milestone – 06 : What Is An App

Create The Sales App

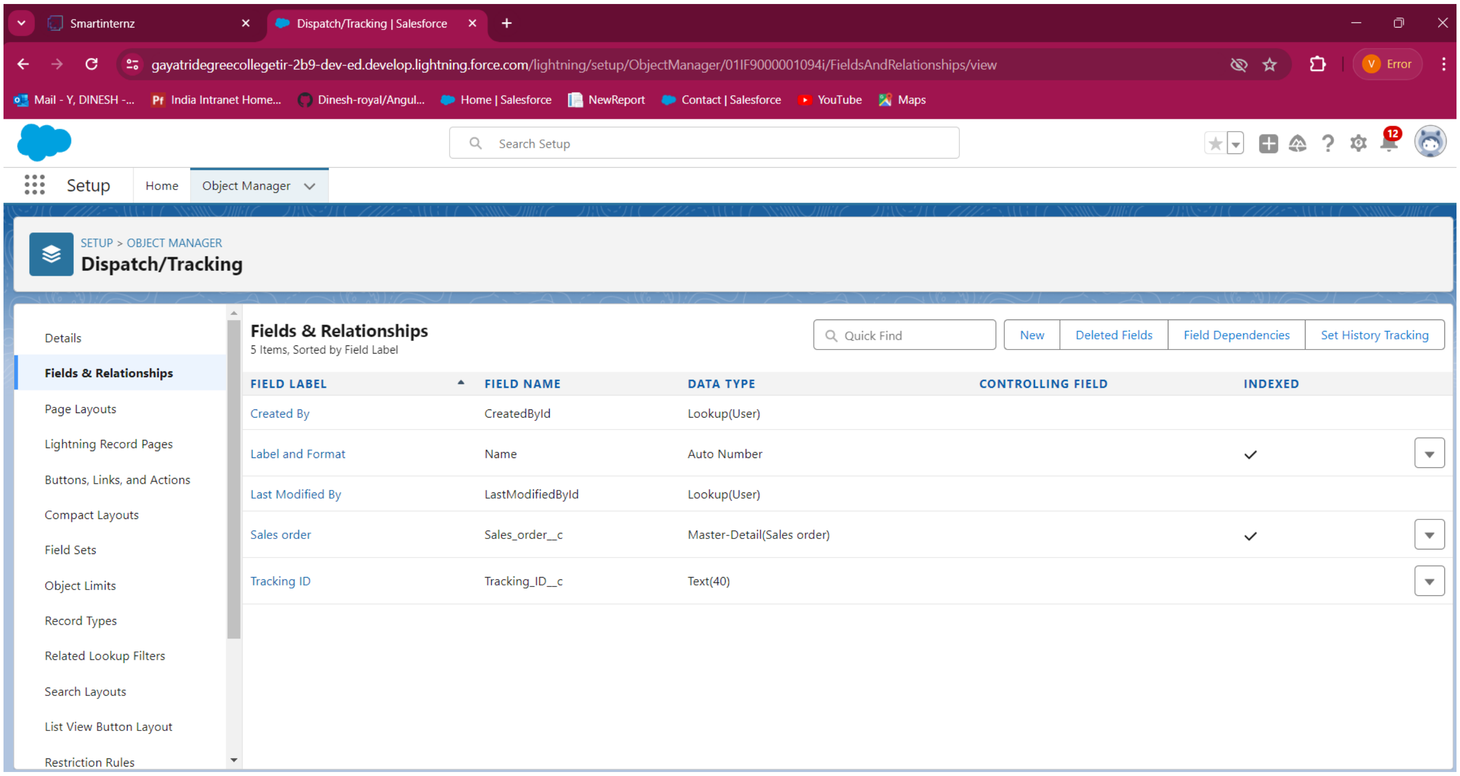
1. *From Setup, enter App Manager in the Quick Find and select App Manager.*
2. *Click New Lightning App.*
3. *Enter **Sales App** as the App Name, then click Next.*
4. *Under App Options, leave the default selections and click Next.*
5. *Under Utility Items, leave as is and click Next.*
6. *From Available 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.*



Milestone 07: **Fields And Relationship**

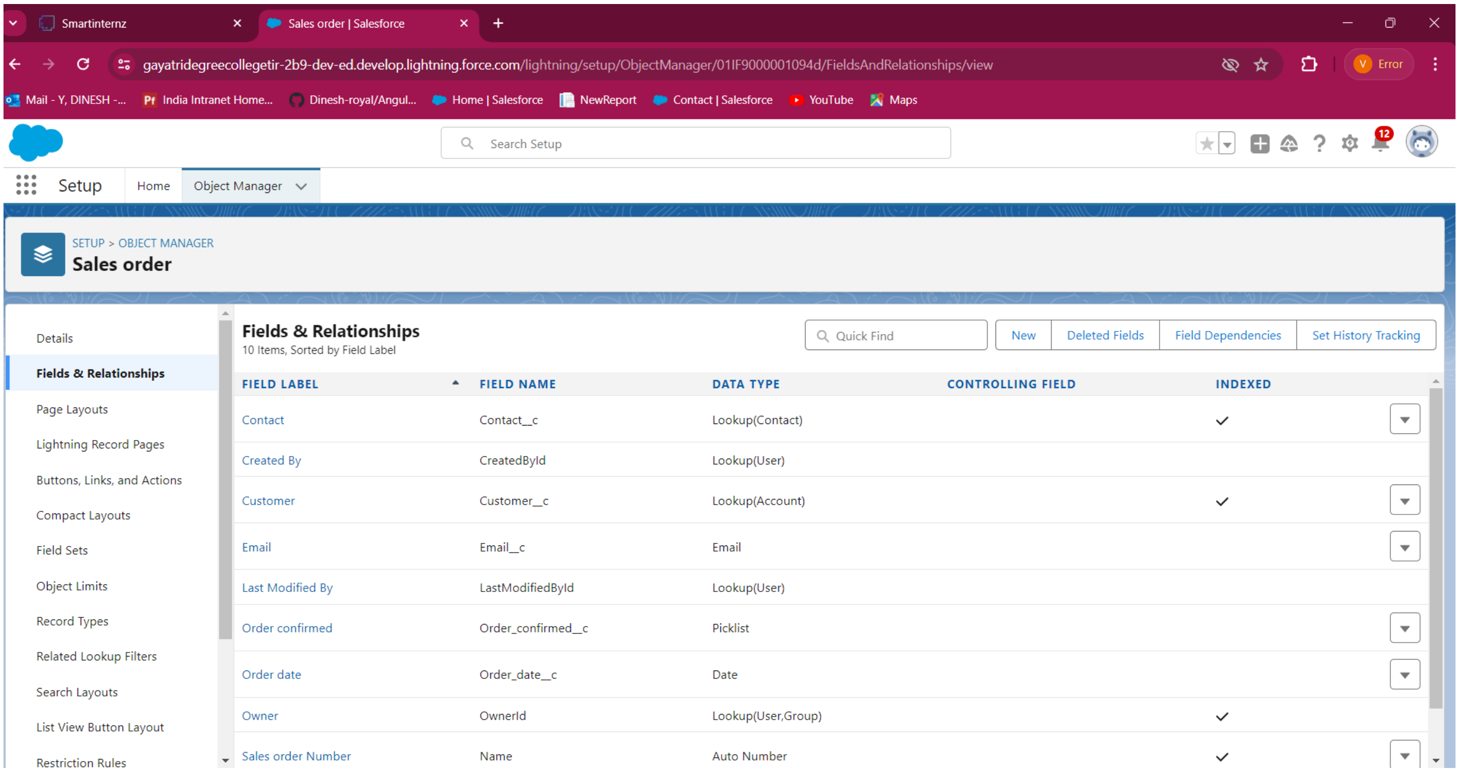
Creation Of Fields For The Dispatch/Tracking Object

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.*



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.*

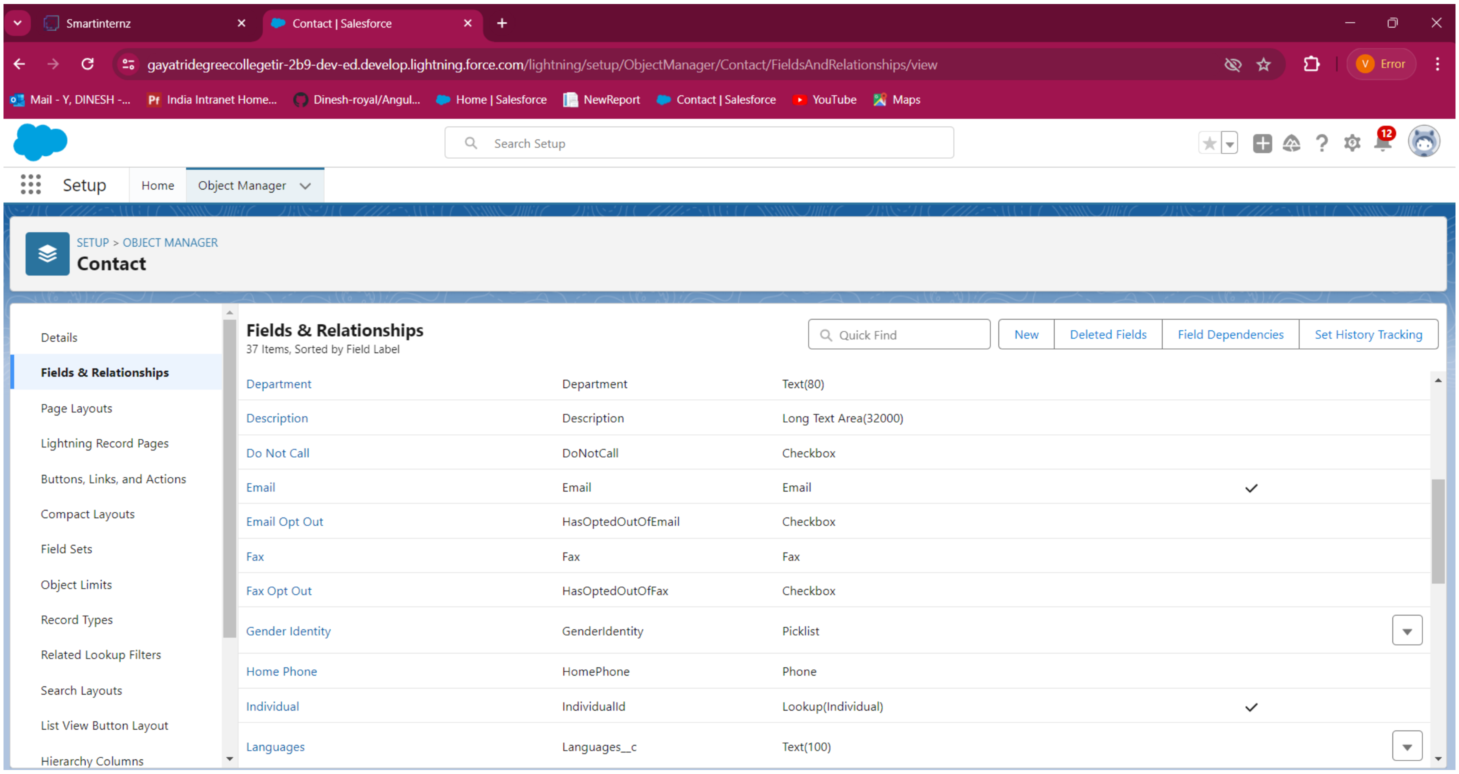


Cross-Object Formula Field

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-

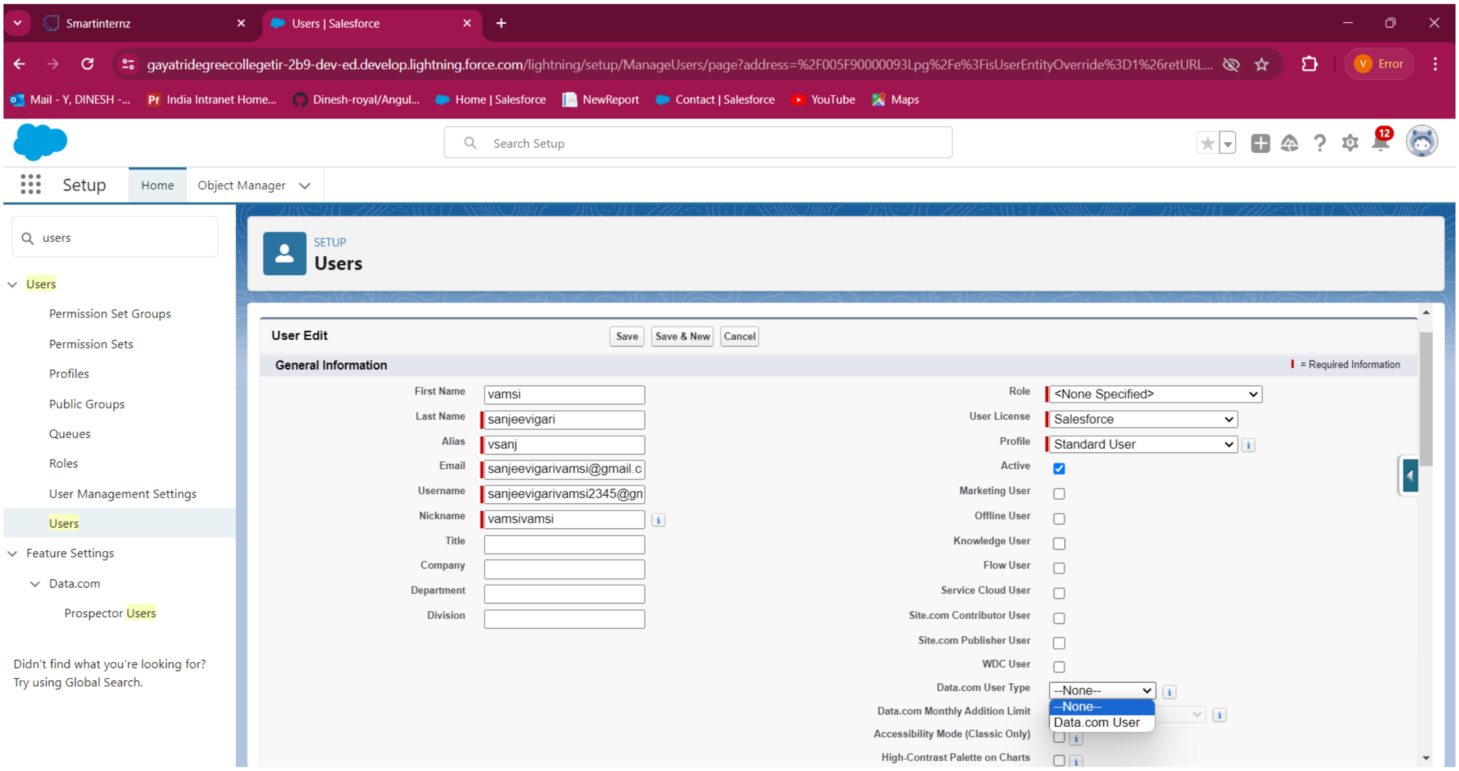
1. *Select your object from object selection has Contact.*
2. *And select the option fields and relationships.*
3. *At the top right side you can find a new select that option.*
4. *Now you have to select data type as **formula.***
5. *And you will navigate to enter the details page where you give the 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.*



Milestone – 09 : User

Creating A User

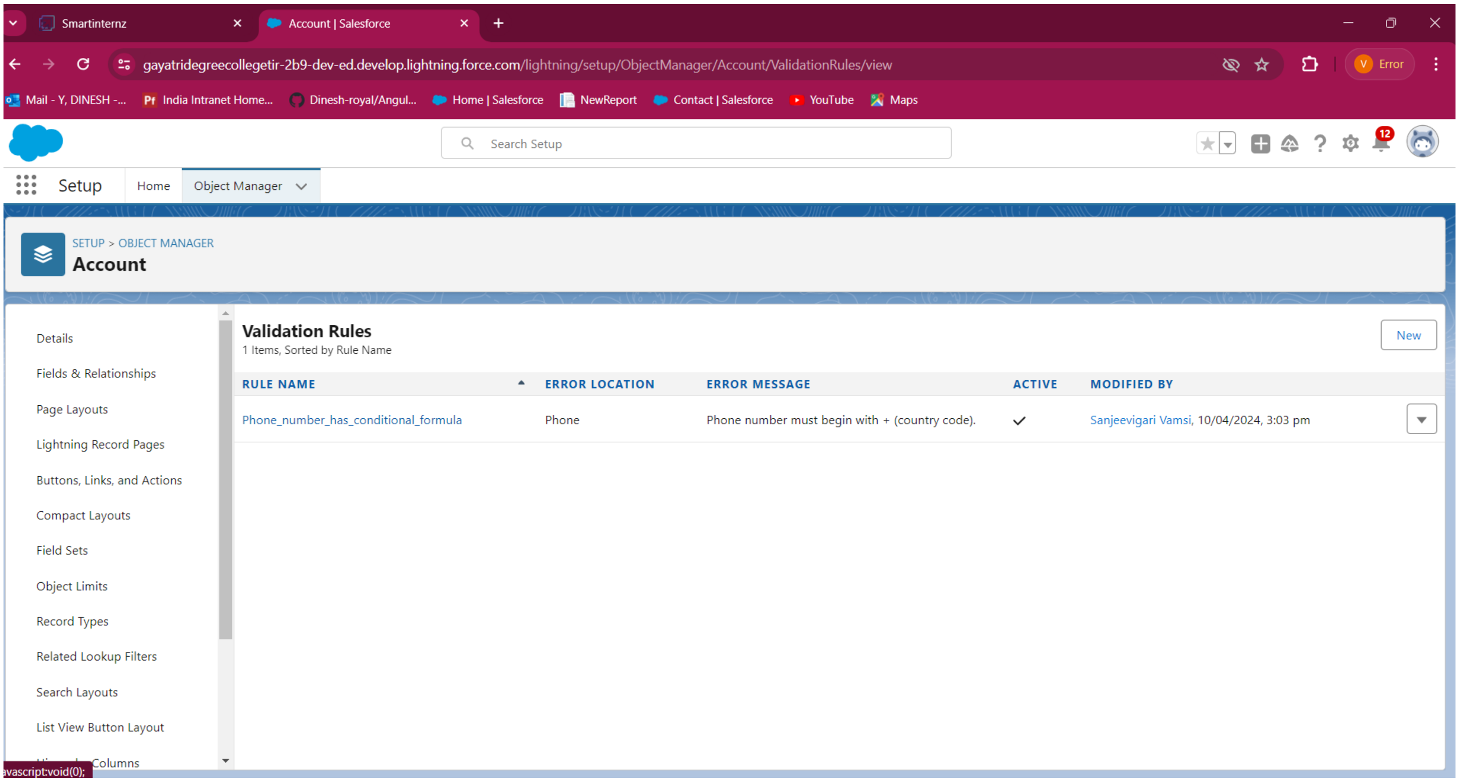
1. *From Setup, in the Quick Find box, enter Users.*
2. *Select Users.*
3. *Click New User.*
4. *Enter the First Name and Last Name manager and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.*
5. *Select a User License 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**

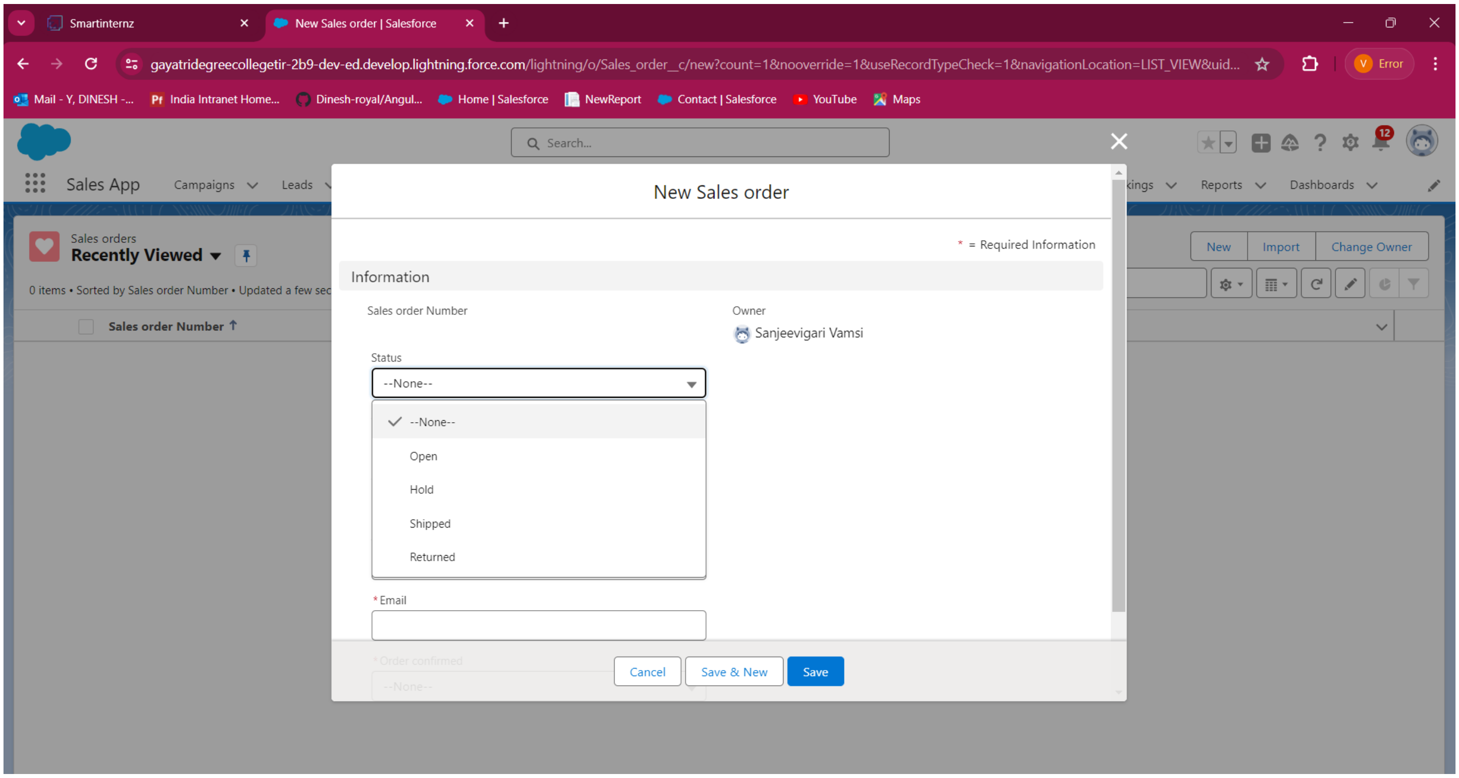
Creation Of Validation Rule

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*



Milestone – 11 : Create Record (Sales Order)

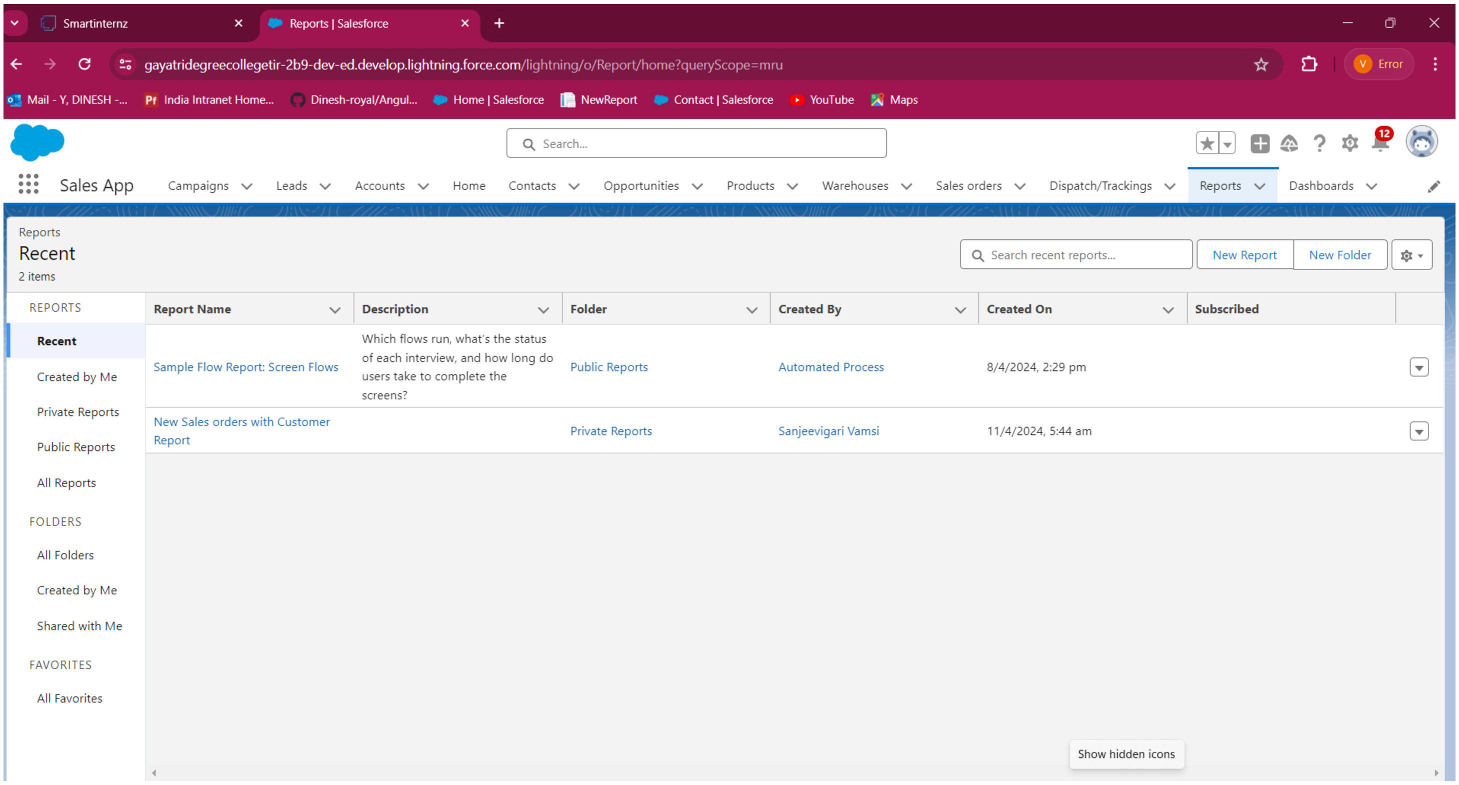
1. *Click on App Launcher on left side of screen.*
2. *Search Sales App & click on it.*
3. *Click on Sales Order tab.*
4. *Click new button*
5. *Fill all Sales Order record details.*
6. *Click on Save Button*



Milestone – 12 : REPORT

Create Report

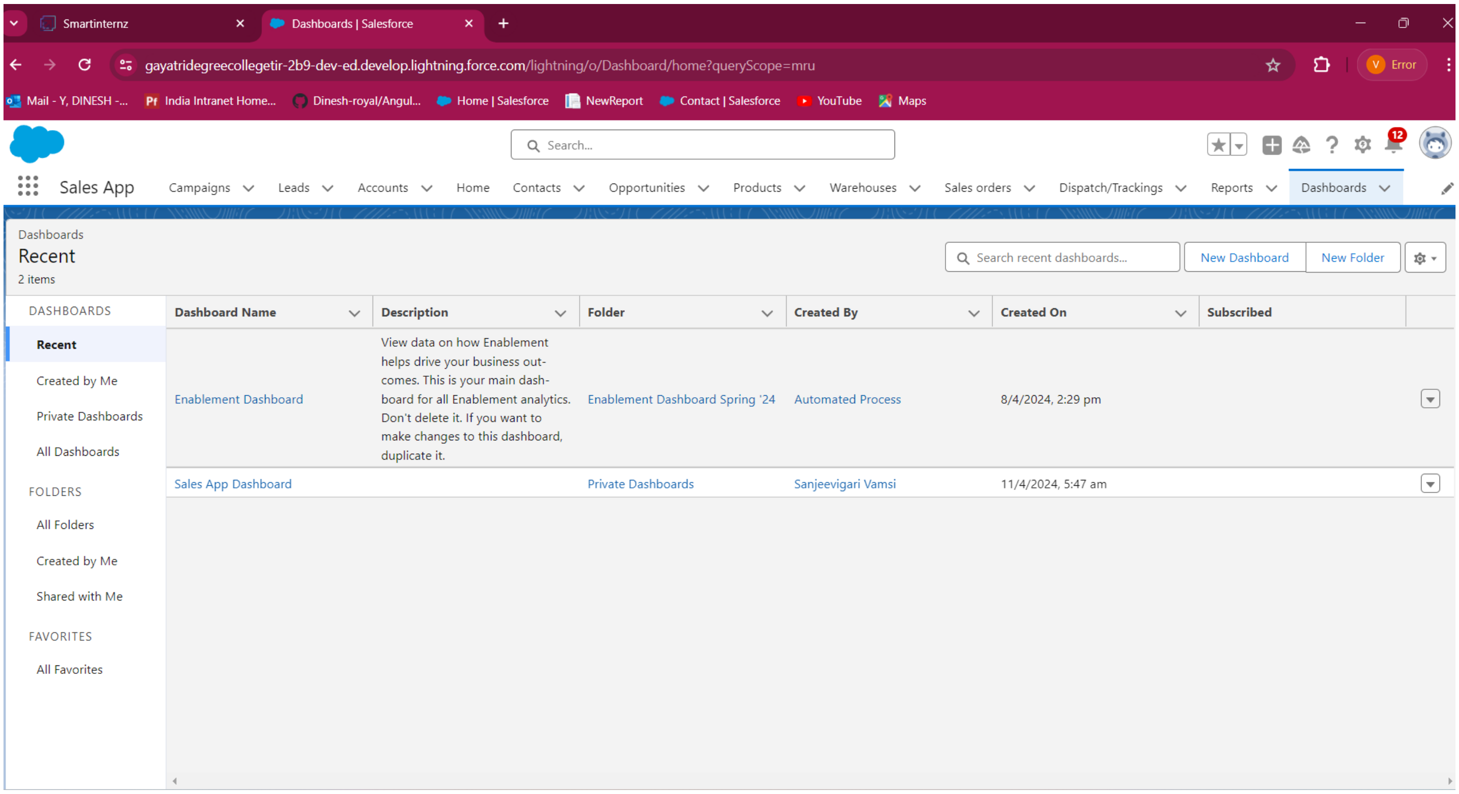
1. *Click App Launcher and*
2. *Select Sales App*
3. *Click reports tab*
4. *Click New Report.*
5. *Click the report type as Sales order with customer Click Start report.*
6. *Customize your report, in group rows select - Customer Account Name*
7. *Click refresh*
8. *Click save and run*



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*

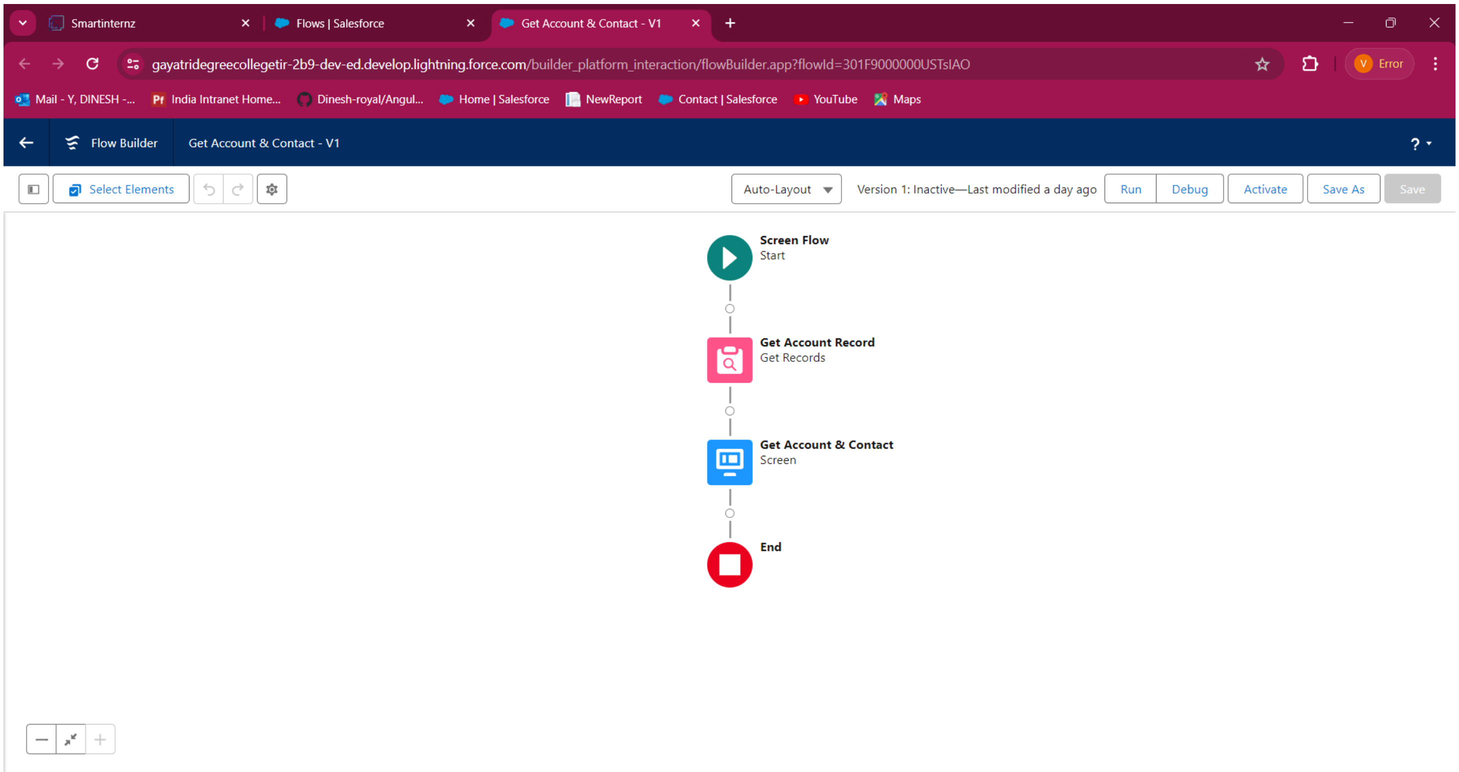


Milestone – 13 : *Flows*

Create Flow

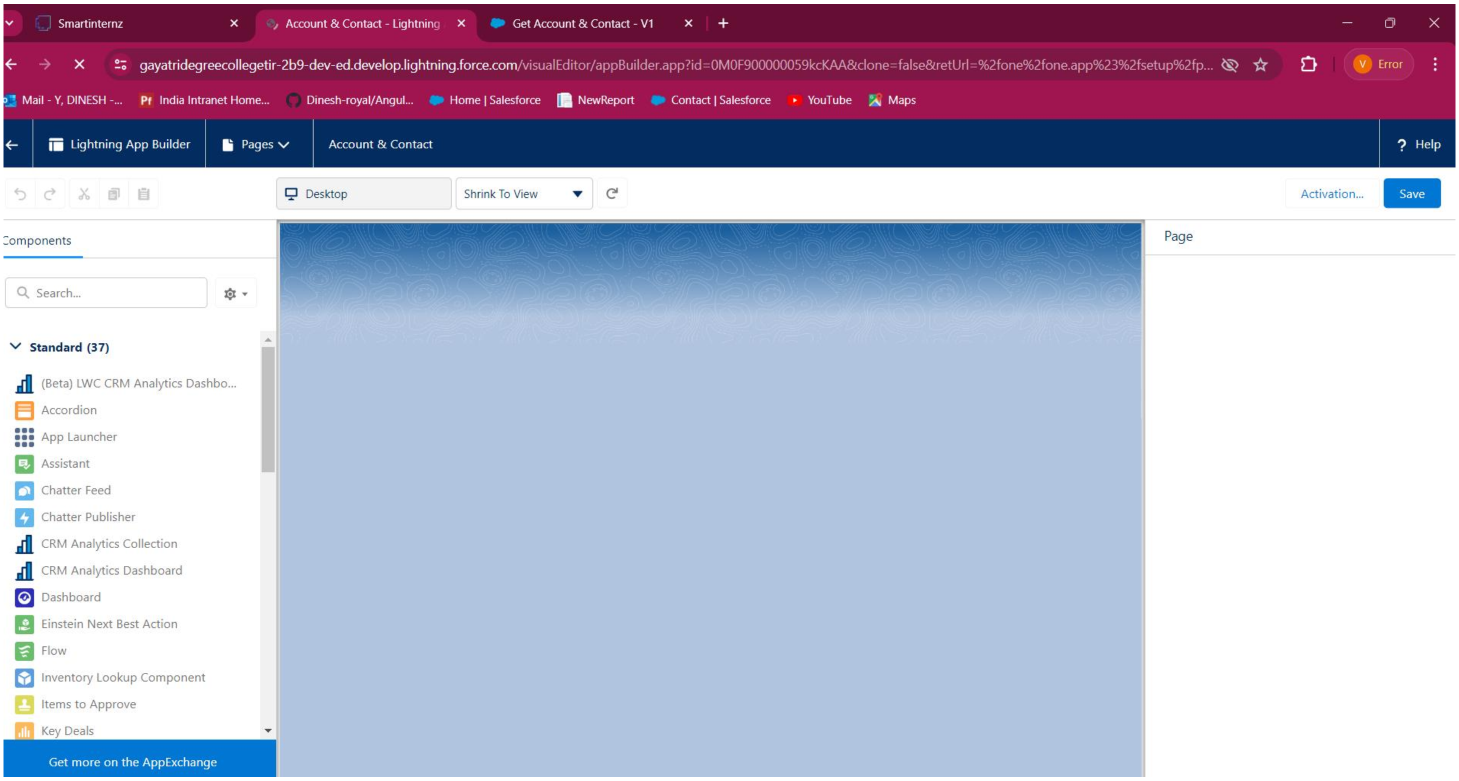
Left side corner of the page you can find a toggle click on that and select a new resource

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

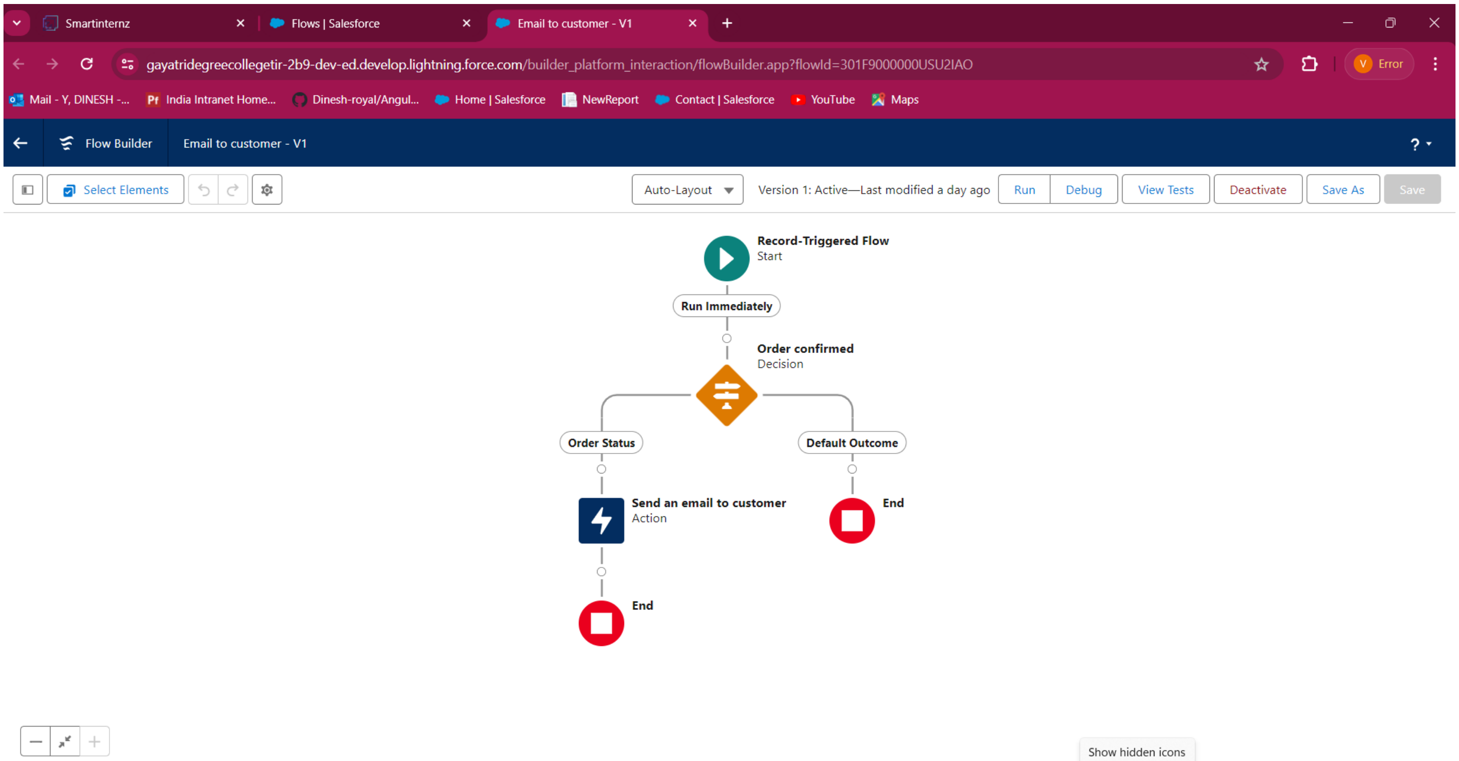
1. *Click on setup gear.*
2. *Now search for lightning App builder.*
3. *And select New option*
4. *In create a new lightning page select Home page.*
5. *Select Next*
6. *Give the label name - Account & Contact*
7. *Choose a standard home page.*
8. *Now in the component section select flow and drag down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

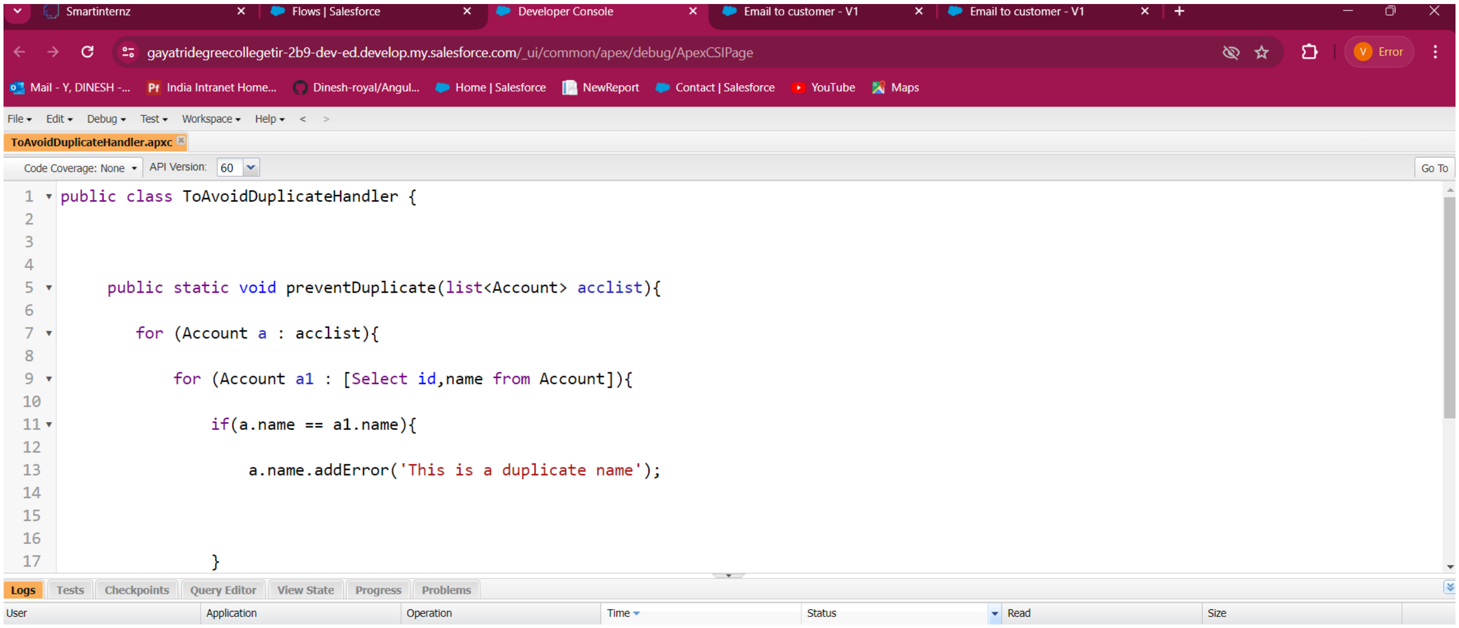
```
public class ToAvoidDuplicateHandler {

 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');

           }
       }
   }

}
```

}



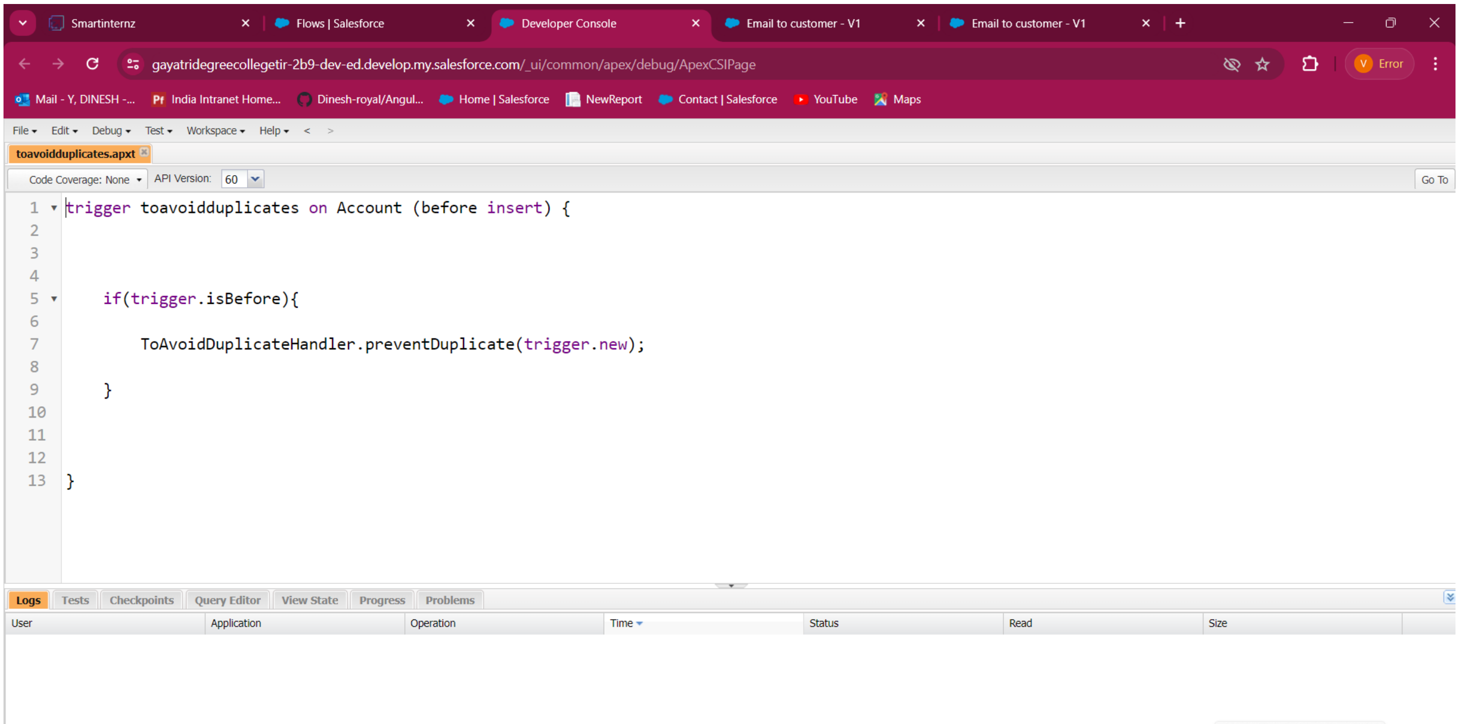
Trigger

1. *Click on Setup and select developer console*
2. *Click on file and than New*
3. *Select Apex trigger give the name as Toavoidduplicates*
4. *Sobject 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
gayatridegreecollegetir-2b9-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
Error
Mail - Y, DINESH -...
India Intranet Home...
Dinesh-royal/Angul...
Home | Salesforce
NewReport
Contact | Salesforce
YouTube
Maps
File Edit Debug Test Workspace Help
toavoidduplicates.apxt
Code Coverage: None
API Version: 60
Go To
trigger toavoidduplicates on Account (before insert) {
if(trigger.isBefore){
ToAvoidDuplicateHandler.preventDuplicate(trigger.new);
}
}
Logs Tests Checkpoints Query Editor View State Progress Problems
User Application Operation Time Status Read Size