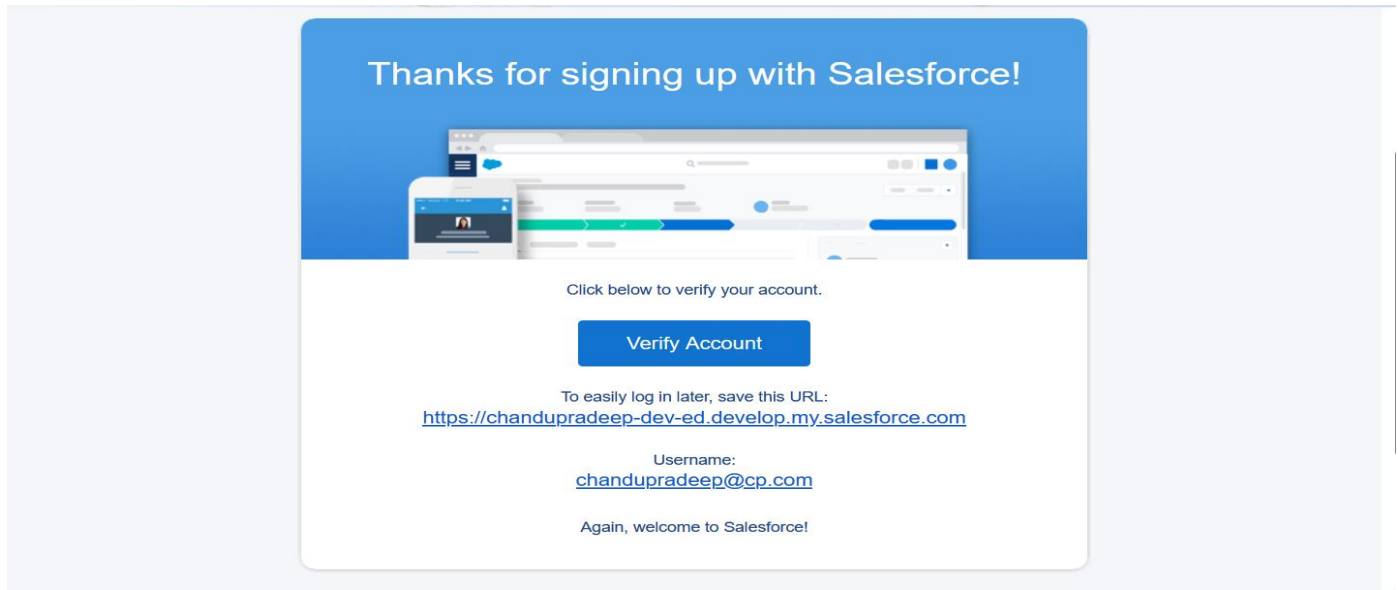


# Retail Management Application Using Salesforce

## 1. Creating Developer Account



Developer Account is Created and Activated

## 2. Creating Custom Objects – Warehouse, Sales Order, Dispatch/Tracking

### Warehouse Object

**Custom Object Definition Edit** [Save] [Save & New] [Cancel]

**Custom Object Information** ⓘ = Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label:  Example: Account

Plural Label:  Example: Accounts

Starts with vowel sound: ☒

The Object Name is used when referencing the object via the API.

Object Name:  Example: Account

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name:  Example: Account Name

Data Type:

**Optional Features**

☒ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing ⓘ

**Object Classification**

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

**Deployment Status** ⓘ What is this?

☐ In Development

☒ Deployed

**Search Status**

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

☒ Allow Search

### Sales Order Object

**Custom Object Definition Edit** [Save] [Save & New] [Cancel]

**Custom Object Information** ⓘ = Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label:  Example: Account

Plural Label:  Example: Accounts

Starts with vowel sound: ☒

The Object Name is used when referencing the object via the API.

Object Name:  Example: Account

# Retail Management Application Using Salesforce

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name  Example: Account Name

Data Type

Display Format  Example: A-0000 [What is this?](#)

Starting Number

**Optional Features**

☒ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing [s](#)

**Object Classification**

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

**Deployment Status**

☐ In Development

☒ Deployed [What is this?](#)

**Search Status**

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

☒ Allow Search

## Dispatch/Tracking Object

**Custom Object Definition Edit** Save Save & New Cancel

**Custom Object Information** ! = Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label  Example: Account

Plural Label  Example: Accounts

Starts with vowel sound ☒

The Object Name is used when referencing the object via the API.

Object Name  Example: Account

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name  Example: Account Name

Data Type

**Optional Features**

☒ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing [s](#)

**Object Classification**

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

**Deployment Status**

☐ In Development

☒ Deployed [What is this?](#)

**Search Status**

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

☒ Allow Search

## 3. Creating Custom Tab for Warehouse, Sales Order, Dispatch/Tracking Object

### New Custom Object Tab

[Help for this Page](#)

**Step 1. Enter the Details** Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#)

Object

Tab Style

### New Custom Object Tab

[Help for this Page](#)

**Step 1. Enter the Details** Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#)

Object

Tab Style

### New Custom Object Tab

[Help for this Page](#)

**Step 1. Enter the Details** Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#)

Object

Tab Style

# Retail Management Application Using Salesforce

## 4. Creating Custom App Named: "Sales App"

### New Lightning App

#### App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

##### App Details

This name appears in the navigation bar so your users can see the name of the app they're currently using.

\*App Name ⓘ

Sales App

\*Developer Name ⓘ

Chandu\_Pradeep

Description ⓘ

For their personal, family, or household use, a product owner has requested to create two applications, one is a sales app for sales reps to use

##### App Branding

Image ⓘ



Clear

Primary Color Hex Value ⓘ

#0070D2

Org Theme Options

☒ Use the app's image and color instead of the org's custom theme

##### App Launcher Preview



##### Sales App

Retailing encompasses the business activities involved...

### New Lightning App

#### Available Items

Create ▼

dash

#### Selected Items

Campaigns

Leads

Accounts

Contacts

Opportunities

Products

Warehouses

Sales orders

Dispatch/Trackings

Reports

Dashboards

### New Lightning App

#### User Profiles

Choose the user profiles that can access this app.

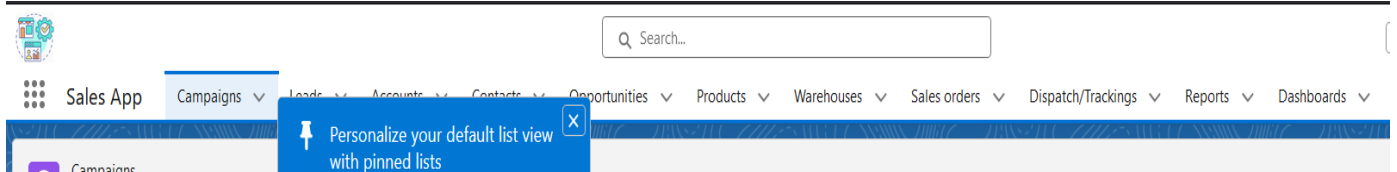
##### Available Profiles

syste

Salesforce API Only System Integrations

##### Selected Profiles

System Administrator



# Retail Management Application Using Salesforce

## 5. Creating Custom Object Fields and Relationship

### Warehouse Object

Address – Data Type as Address it is Enable user Interface.

Step 2. Enter the details Step 2 of 4

Field Label

Field Name

Description

### Location – Data Type as Geolocation

Warehouse Help for this Page

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label

Enter the name of the location, such as Main Office. Be descriptive and specific, and remember that one record may have multiple locations, such as West Coast Sales Office and East Coast Sales Office.

Latitude and Longitude Display Notation ☐ Degrees, Minutes, Seconds ☒ Decimal

Decimal Places

Number of digits to the right of the decimal point

Field Name

### Sales Order Object

#### Status Fields

SETUP > OBJECT MANAGER **Sales order**

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 List View Button Layout Restriction Rules

Sales order Help for this Page

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label

Values ☐ Use global picklist value set ☒ Enter values, with each value separated by a new line

Open  
Hold  
Shipped  
Returned

☐ Display values alphabetically, not in the order entered

☐ Use first value as default value

☒ Restrict picklist to the values defined in the value set

Field Name

#### Look up Relationship Between Sales Order and Account

Sales order Help for this Page

New Relationship

Step 3. Enter the label and name for the lookup field Step 3 of 6

Field Label

Field Name

Description

Help Text

Child Relationship Name

Required ☒ Always require a value in this field in order to save a record

# Retail Management Application Using Salesforce

## Look up Relationship Between Sales Order and Contact

Sales order

New Relationship

Help for this Page

Step 3. Enter the label and name for the lookup field

Step 3 of 6

Field Label

Contact

Field Name

Contact

Description

Help Text

Child Relationship Name

Sales\_orders

Lookup Filter

Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

Hide Filter Settings

Filter Criteria

Insert Suggested Criteria

Field

Contact: Account ID

Operator

equals

Value / Field

Field

Sales order: Customer

Clear

AND

Begin typing to search for a field...

--None--

Value

Clear

Add Filter Logic...

Filter Type

☒ Required. The user-entered value must match filter criteria.  
If it doesn't, display this error message on save:  
Value does not exist or does not match filter criteria.  
[Reset to default message](#)

☐ Optional. The user can remove the filter or enter values that don't match criteria.

Lookup Window Text

Add this informational message to the lookup window.

Active

☒ Enable this filter.

## Order Date Field

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: `Reminder Date = CloseDate - 7` [More Examples...](#)

Simple Formula

Advanced Formula

Insert Field

Insert Operator

Order date (Date) =  
TODAY ()

Functions

-- All Functions

SUBSTITUTE

TAN

SETUP > OBJECT MANAGER					
Sales order					
Details	Fields & Relationships				
	8 Items, Sorted by Field Label				
	<div>Quick Find</div> <div>NewDeleted FieldsField DependenciesSet History Tracking</div>				
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Contact	Contact_c	Lookup(Contact)		✓
Lightning Record Pages	Created By	CreatedById	Lookup(User)		
Buttons, Links, and Actions	Customer	Customer_c	Lookup(Account)		✓
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)		
Field Sets	Order date	Order_date_c	Formula (Date)		
Object Limits	Owner	OwnerId	Lookup(User,Group)		✓
Record Types	Sales order Number	Name	Auto Number		✓
Related Lookup Filters	Status	Status_c	Picklist		
Search Layouts					
List View Button Layout					

# Retail Management Application Using Salesforce

## Dispatch / Tracking Object

### Tracking ID - Data Type - Text

Step 2. Enter the details Step 2 of 4

Field Label  ⓘ

Please enter the maximum length for a text field below.

Length

Field Name  ⓘ

[Previous](#) [Next](#) [Cancel](#)

### Dispatched – Data Type - Checkbox

Step 2. Enter the details Step 2 of 4

Field Label  ⓘ

Default Value ☐ Checked ☒ Unchecked

Field Name  ⓘ

[Previous](#) [Next](#) [Cancel](#)

### Expected date of delivery – Data Type - Date

Dispatch/Tracking  
New Custom Field

[Help for this Page](#) ⓘ

Step 2. Enter the details Step 2 of 4

Field Label  ⓘ

Field Name  ⓘ

Description

[Previous](#) [Next](#) [Cancel](#)

## Master Details Relation Between Sales Order and Dispatch

Dispatch/Tracking  
New Relationship [Help for this Page](#) ⓘ

Step 3. Enter the label and name for the lookup field Step 3 of 6

Field Label  ⓘ

Field Name  ⓘ

Description

Help Text  ⓘ

Child Relationship Name  ⓘ

[Previous](#) [Next](#) [Cancel](#)

Dispatch/Tracking					
<div>Details</div> <div>Fields &amp; Relationships</div> <div>Page Layouts</div> <div>Lightning Record Pages</div> <div>Buttons, Links, and Actions</div> <div>Compact Layouts</div> <div>Field Sets</div> <div>Object Limits</div> <div>Record Types</div> <div>Related Lookup Filters</div> <div>Search Layouts</div>	Fields & Relationships		7 Items, Sorted by Field Label		
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
	Created By	CreatedById	Lookup(User)		
	Dispatch/Tracking Name	Name	Text(80)		✓
	Dispatched	Dispatched__c	Checkbox		
	Expected date of delivery	Expected_date_of_delivery__c	Date		
	Last Modified By	LastModifiedById	Lookup(User)		
	Sales order	Sales_order__c	Master-Detail(Sales order)		✓
	Tracking ID	Tracking_ID__c	Text(40) (External ID) (Unique Case Sensitive)		✓

# Retail Management Application Using Salesforce

## Contact Object

### Account Website Fields

SETUP > OBJECT MANAGER  
**Contact**

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

List View Button Layout

Hierarchy Columns

Scoping Rules

Step 2. Choose output type

Step 2 of 5

PreviousNextCancel

Field LabelAccount WebsiteField NameAccount\_Website

Auto add to custom report type☒ Add this field to existing custom report types that contain this entity

Formula Return Type

☐ None Selected

Select one of the data types below.

☐ Checkbox

Calculate a boolean value.  
Example: `TODAY() > CloseDate`

☐ Currency

Calculate a dollar or other currency amount and automatically format the field as a currency amount.  
Example: `(Gross Margin = Amount - Cost_C)`

☐ Date

Calculate a date, for example, by adding or subtracting days to other dates.  
Example: `(Reminder Date = CloseDate - 7)`

☐ Date/Time

Calculate a date/time, for example, by adding a number of hours or days to another date/time.  
Example: `(Next = NOW() + 1)`

☐ Number

Calculate a numeric value.  
Example: `(Fahrenheit = 1.8 * Celsius_c + 32)`

☐ Percent

Calculate a percent and automatically add the percent sign to the number.  
Example: `(Discount = (Amount - Discounted_Amount_c) / Amount)`

☒ Text

Create a text string, for example, by concatenating other text fields.  
Example: `(Full Name = LastName & ", " & FirstName)`

☐ Time

Calculate a time, for example, by adding a number of hours to another time.

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

**Example:** Full Name = LastName & ", " & FirstName [More Examples...](#)

Simple Formula Advanced Formula

Insert Field

Insert Operator ▼

Account Website (Text) =

Account.Website

Func

-- A

ABS

ACC

AND

Contact

### New Custom Field

Help for this Page

Step 4. Establish field-level security

Step 4 of 5

PreviousNextCancel

Field LabelAccount Website

Data TypeFormula

Field NameAccount\_Website

Description

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	<input checked="" type="checkbox"/> Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## 6. Create User

SETUP  
**Users**

New User

Help for this Page

User Edit

SaveSave & NewCancel

General Information

= Required Information

First NamePradeep

Last NameChandu

Aliaschandu

Emailideepsatya222@gmail.com

Usernamepradeepsatya222@gmail.

NicknameUser169755889997313019

Role<None Specified>

User LicenseSalesforce

ProfileStandard User

Active☒

Marketing User☐

Offline User☐

# Retail Management Application Using Salesforce

## 7. Validation Rule

### Account Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

**Validation Rule Edit** Save Save & New Cancel

Rule Name

Active ☒

Description

**Error Condition Formula** ! = Required Information

**Example:**  [More Examples...](#)  
Display an error if Discount is more than 30%  
If this formula expression is **true**, display the text defined in the Error Message area

**Functions**  
  
ABS  
ACOS  
ADDMONTHS

**Error Message**

**Example:**

This message will appear when Error Condition formula is **true**

Error Message

This error message can either appear at the top of the page or below a specific field on the page

Error Location ☐ Top of Page ☒ Field

Save Save & New Cancel

## 8. User Adoption

### Create Record (Sales Order)

**New Sales order**

New Import

Settings List View

\* = Required Information

**Information**

Sales order Number

Owner Chandu Pradeep

\* Status

\* Customer

Pc

\* Contact

Pradeep Chandu

Cancel Save & New Save

### View Record (Sales Order)

Sales order  
**SO-0001**

**Related** **Details**

Sales order Number  
SO-0001

Owner  
 Chandu Pradeep

Status  
Open

Customer  
Pc

Contact  
Pradeep Chandu

Order date  
17/10/2023



# Retail Management Application Using Salesforce

## Delete Record (Sales Order)

×

Delete Sales order

Are you sure you want to delete this Sales order?

Cancel

Delete

## Create Record (Warehouse)

\* Warehouse Name

Address

Address (Country/Territory)

India

Address (Street)

Address (City)

Address (ZIP/Postal Code)

Address (State/Province)

Location

Latitude

Longitude

Owner

Chandu Pradeep

Reports

Dashboards

New

Import

## View Record (Warehouse)

Warehouse

Tanuku

New Contact

Edit

Related

Details

Warehouse Name

Tanuku

Address

Location

Created By

Chandu Pradeep, 17/10/2023, 9:54 pm

Owner

Chandu Pradeep

Last Modified By

Chandu Pradeep, 17/10/2023, 9:54 pm

## Delete Record (Warehouse)

×

Delete Warehouse

Are you sure you want to delete this Warehouse?

Cancel

Delete

Page 9 of 20

# Retail Management Application Using Salesforce

## Create Record (Dispatch / Tracking)

### New Dispatch/Tracking

\* = Required Information

#### Information

\* Dispatch/Tracking Name

DTDC

\* Tracking ID

1234

\* Expected date of delivery

25/10/2023

\* Sales order

SO-0001

Cancel

Save & New

Save

## View Record (Warehouse)

Dispatch/Tracking  
**DTDC**

✓ Dispatch/Tracking "DTDC" was created.

Related

Details

Dispatch/Tracking Name

DTDC

Tracking ID

1234

Expected date of delivery

25/10/2023

Sales order

[SO-0001](#)

## Delete Record (Warehouse)

### Delete Dispatch/Tracking

Are you sure you want to delete this Dispatch/Tracking?

Cancel

Delete

## 9. Reports

### Name: New Sales orders with Customer Report

### Create Report

**Category**  
Recently Used  
**All**  
Accounts & Contacts  
Opportunities  
Customer Support Reports

Select a Report Type

sales

Report Type Name	Category
Sales orders	Standard
Sales orders with Customer	Standard
Sales orders with Contact	Standard
Sales orders with Dispatch/Trackings	Standard

**Details**

**Sales orders with Customer**  
Standard Report Type  

Start Report

Details

Fields (65)

# Retail Management Application Using Salesforce

Save Report

Report Name

New Sales orders with Customer Report

Report Unique Name

New\_Sales\_orders\_with\_Customer\_Report\_acp

Report Description

Folder

Public Reports

Select Folder

## View Report: New Sales orders with Customer Report

REPORT

New Sales orders with Customer Report

Sales orders with Customer

Update Preview Automate

Outline

Filters

Previewing a limited number of records. Run the report to see everything.

Update Preview

Customer: Account Name

Order date

Sales order: Sales order Number

Contact

Pc (1)

18/10/2023 (1)

SO-0001

Pradeep Chandu

Subtotal

Subtotal

Total (1)

## 10. Dashboard

### Name: Sales App Dashboard

New Dashboard

Name

Sales App Dashboard

Description

Folder

Public

Select Folder

Cancel

Create

Add Component

Report

New Sales orders with Customer Repo

Use chart settings from report

Display As

123

Y-Axis

Customer: Account Name

X-Axis

Record Count

Stack By

Preview

New Sales orders with Customer Report

Record Count

Order date

0

0.2

0.4

0.6

0.8

1

18/10/2023

Customer: Account Name

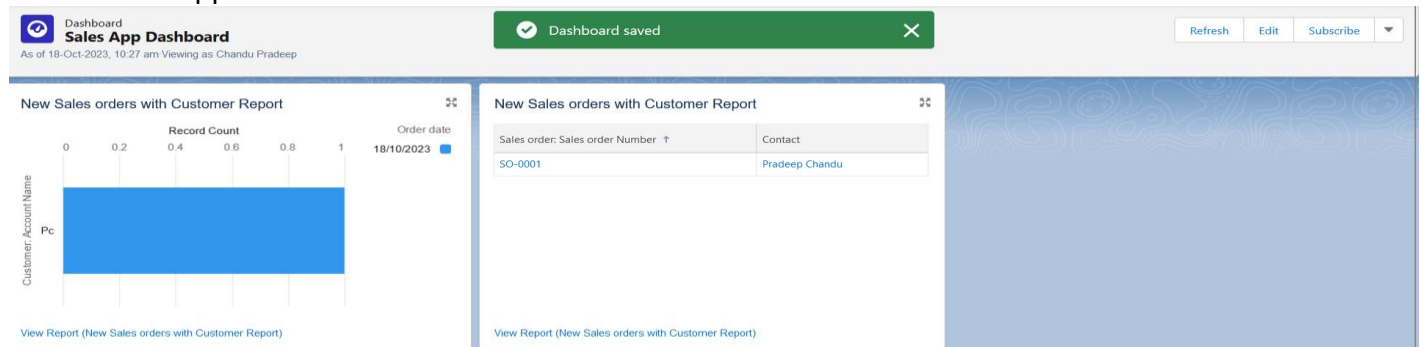
Pc

View Report (New Sales orders with Customer Report)

# Retail Management Application Using Salesforce

## 11. View Dashboard

Name: Sales App Dashboard



## 12. Flow

Create a Resource Name: recordId

New Resource

\* Resource Type  
Variable

\* API Name  
recordId

Description

\* Data Type  
Text

Allow multiple values (collection)

Default Value  
Enter value or search resources...

Availability Outside the Flow

Available for input

Available for output

Create Get Record Element Named: Get Account Record

New Get Records

\* Label  
Get Account Record

\* API Name  
Get\_Account\_Record

Description  
Get Account Record

Get Records of This Object

\* Object  
Account

Filter Account Records

Condition Requirements  
All Conditions Are Met (AND)

Field  
Id

Operator  
Equals

Value  
recordId

+ Add Condition

Sort Account Records

Sort Order  
Ascending

Sort By  
Name

# Retail Management Application Using Salesforce

## How Many Records to Store

- ☒ Only the first record  
☐ All records

## How to Store Record Data

- ☒ Automatically store all fields  
☐ Choose fields and let Salesforce do the rest  
☐ Choose fields and assign variables (advanced)

Screen Name: Get Account & Contact

## Name

Name

First Name

Last Name

First Name

Last Name

Name

Disabled

{!\$GlobalConstant.False}

Fields To Display

firstName,lastName

First Name

## Email

Last Name

Email

\*Email

you@example.com

\*Phone

Email

\*API Name

Email

\*Label

## Phone

\*Phone

Address

Phone

\*API Name

Phone

## Address

\*Email

you@example.com

\*Phone

Address

Street

City

Zip/Postal Code

State/Province

Country

Pause

Previous

Finish

Address

City Value

{!Get\_Account\_Record.BillingCity}

Country Options

Enter value or search resources...

Country Value

{!Get\_Account\_Record.BillingCountry}

Label

Address

Postal Code Value

{!Get\_Account\_Record.BillingPostalCode}

State/Province Options

Enter value or search resources...

State/Province Value

{!Get\_Account\_Record.BillingState}

Street Value

{!Get\_Account\_Record.BillingStreet}

Saved Name: Get Account & Contact

# Retail Management Application Using Salesforce

## 13. Create a Home page For Sales App

Create a new Lightning page

App Page

Home Page

Customize the Lightning Experience Home page.

Create a new Lightning page

\* Label

Account & Contact

STANDARD (4)

Header and Three Regions

Home Template One Region

Home Template One Region

Standard Home Page

Desktop

Shrink To View

Activation...

Save

Components

Search...

Standard (32)

Accordion

App Launcher

Assistant

Chatter Feed

Chatter Publisher

Dashboard

Sales App Dashboard

As of 18-Oct-2023, 10:27 am Viewing as Chandu Pradeep

Open

Refresh

Subscribe

New Sales orders with Customer ...

New Sales orders with Customer ...

Flow Component: Get Account & Contact

This is a placeholder. Flows don't run in the canvas.

Page > Dashboard

\*Dashboard

Sales App Dashboard (Public)

Max Height

☒ Hide on Error

Set Component Visibility

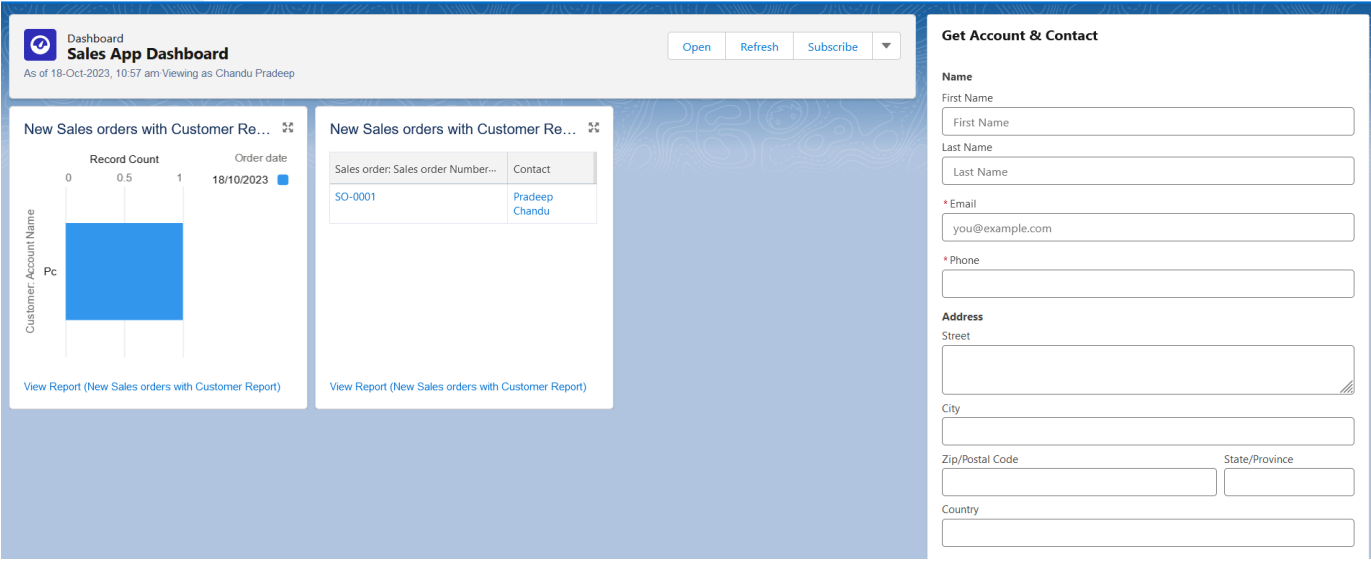
## Assigned it to Sales App

<input type="checkbox"/> Sales	Manage your sales process with accounts, leads, opportunities, and more
<input checked="" type="checkbox"/> Sales App	Retailing encompasses the business activities involved in selling goods ...
<input type="checkbox"/> Sales Console	(Lightning Experience) Lets sales reps work with multiple records on on...

Review Assignments (3)			
App	Profile	Current Page	New Page
Sales App	Standard Platform User	Account & Contact	Account & Contact
Sales App	Standard User	Account & Contact	Account & Contact
Sales App	System Administrator	Account & Contact	Account & Contact

# Retail Management Application Using Salesforce

## Home Page Preview



## 14. Edit Email Field in Sales Order

Sales order Custom Field

Email

Back to Sales order

Validation Rules (0)

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Email	Object Name	Sales order
Field Name	Email	Data Type	Email
API Name	Email__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Chandu Pradeep	Modified By	Chandu Pradeep
	18/10/2023, 11:01 am		18/10/2023, 11:01 am

General Options

Required	<input checked="" type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
Default Value	

## Create Order Confirmed Picklist Field

SETUP > OBJECT MANAGER

Sales order

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

List View Button Layout

Field Label

Order confirmed

Values

Use global picklist value set

Enter values, with each value separated by a new line

Yes

No

Display values alphabetically, not in the order entered

Use first value as default value

Restrict picklist to the values defined in the value set

Field Name

Order\_confirmed

Description

Help Text

Required

Always require a value in this field in order to save a record

# Retail Management Application Using Salesforce

## 15. Create a Record Trigger Flow

Start

Record-Triggered Flow

Object: **Sales order**

Trigger: **A record is created or updated**

Conditions: **3**

Optimize for: **Actions and Related Records**

+ Add Scheduled Paths (Optional)

+ Open Flow Trigger Explorer for Sales order

run immediately

End

Custom Condition Logic Is Met

\* Condition Logic ⓘ  
1 OR (2 AND 3)

1

Field

Order\_confirmed\_\_c

Operator

Equals

Value

Yes

2

Field

Order\_confirmed\_\_c

Operator

Is Changed

Value

True

3

Field

Order\_confirmed\_\_c

Operator

Equals

Value

Yes

+ Add Condition

When to Run the Flow for Updated Records ⓘ  
☒ Every time a record is updated and meets the condition requirements  
☐ Only when a record is updated to meet the condition requirements  

ⓘ Because you selected the Is Changed operator in a condition, you can't change when to run the flow for updated records. To select an option for when to run the flow, remove all Is Changed operators from the conditions.

\* Optimize the Flow for:  

Fast Field Updates  
Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

Actions and Related Records  
Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

## Added a Decision Element

New Decision

\* Label  
Order confirmed

\* API Name  
Order\_confirmed

Description

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER ⓘ +

OUTCOME DETAILS

Order Status

\* Label  
Order Status

\* Outcome API Name  
Order\_Status

Condition Requirements to Execute Outcome  
All Conditions Are Met (AND)

Resource

Operator

Value

\$Record > Order confirmed

Equals

Yes

+ Add Condition

## Added an Action to Send Email

New Action

Filter By  
Category

Send Email

Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.

\* Label  
email to customer

\* API Name  
email\_to\_customer

Description  
email to customer

Set Input Values for the Selected Action

A<sub>a</sub> Body ⓘ  
{!EmailBody}

Include

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# Retail Management Application Using Salesforce

New Action

A<sub>a</sub>

Recipient Address List

ⓘ

{!\$Record.Email\_\_c}

Include

A<sub>a</sub>

Recipient ID

Don't Include

A<sub>a</sub>

Related Record ID

Don't Include

Ⓞ

Rich-Text-Formatted Body

Don't Include

A<sub>a</sub>

Sender Email Address

Don't Include

A<sub>a</sub>

Sender Type

Don't Include

A<sub>a</sub>

Subject

ⓘ

Order confirmation

Include

\* API Name

EmailBody

Description

\* Body ⓘ

Resource Picker

Insert a resource...

Q

View as Rich Text ▾

Hi {!\$Record.Customer\_\_r.Name}

Your Order Id : {!\$Record.Name} is Confirmed.

Thankyou

Save the flow

\* Flow Label

Email to customer

\* Flow API Name

Email\_to\_customer

Description

Show Advanced

Cancel

Save

Order confirmation

Inbox x

Chandu Pradeep via

to me ▾

Hi Pc

Your Order Id : SO-0001 is Confirmed.

Thankyou

# Retail Management Application Using Salesforce

## 16. Apex Trigger Class

### Trigger: AvoidduplicatesinAccount

```
AvoidduplicatesinAccount.apxt | AvoidduplicatesinAccountHandler.apxc | AvoidduplicatesinAccountTest.apxc
Code Coverage: All Tests 100% | API Version: 59
1 trigger AvoidduplicatesinAccount on Account (before insert,before Update) {
2     if(Trigger.isBefore){
3         if(Trigger.isInsert){
4             AvoidduplicatesinAccountHandler.ChecktheAccountNamebeforeinsert(Trigger.New);
5         }
6         if(Trigger.isUpdate){
7             AvoidduplicatesinAccountHandler.ChecktheAccountNamebeforeupdate(Trigger.New,Trigger.oldMap);
8         }
9     }
10 }
```

### Apex Class: AvoidduplicatesinAccountHandler

```
AvoidduplicatesinAccount.apxt | AvoidduplicatesinAccountHandler.apxc | AvoidduplicatesinAccountTest.apxc
Code Coverage: All Tests 85% | API Version: 59
1 public class AvoidduplicatesinAccountHandler {
2     public static void ChecktheAccountNamebeforeinsert(List<Account> newaccount){
3         Set<String> accname = new Set<String>();
4         for(Account acc : newaccount){
5             accname.add(acc.Name);
6         }
7         if(!accname.isEmpty()){
8             Set<String> checkAccountNames = new Set<String>();
9             List<Account> checkaccount = [Select Name From Account Where Name In :accname];
10            for(Account ca : checkaccount){
11                checkAccountNames.add(ca.Name);
12            }
13            if(!checkaccount.isEmpty()){
14                for(Account ac : newaccount){
15                    if(checkAccountNames.contains(ac.Name)){
16                        ac.addError(ac.Name+' is Already Exist Can't Create Duplicates.');
```

```
AvoidduplicatesinAccount.apxt | AvoidduplicatesinAccountHandler.apxc | AvoidduplicatesinAccountTest.apxc
Code Coverage: All Tests 85% | API Version: 59
21    }
22    public static void ChecktheAccountNamebeforeupdate(List<Account> newaccount,Map<Id,Account> oldaccmap){
23        Set<String> accname = new Set<String>();
24        for(Account acc : newaccount){
25            if(oldaccmap!=null){
26                if(acc.Name!=oldaccmap.get(acc.Id).Name){
27                    accname.add(acc.Name);
28                }
29            }
30        }
31        if(!accname.isEmpty()){
32            Set<String> checkAccountNames = new Set<String>();
33            List<Account> checkaccount = [Select Name From Account Where Name In :accname];
34            for(Account ca : checkaccount){
35                checkAccountNames.add(ca.Name);
36            }
37            if(!checkaccount.isEmpty()){
38                for(Account ac : newaccount){
39                    if(checkAccountNames.contains(ac.Name)){
40                        ac.addError(ac.Name+' is Already Exist Can't Create Duplicates.');
```

# Retail Management Application Using Salesforce

## Test Class: AvoidduplicatesinAccountTest

```

AvoidduplicatesinAccount.apxt | AvoidduplicatesinAccountHandler.apxc | AvoidduplicatesinAccountTest.apxc
Code Coverage: None | API Version: 59

1  @isTest
2  public class AvoidduplicatesinAccountTest {
3      @testSetup
4      private static void AccountSetup(){
5          List<Account> listofnewaccount = new List<Account>();
6          for(Integer i=0;i<10;i++){
7              Account newacc = new Account();
8              newacc.Name='NewAccount'+i;
9              newacc.Phone='+91 123456789'+i;
10             listofnewaccount.add(newacc);
11         }
12         if(!listofnewaccount.isEmpty()){
13             system.debug('hi1');
14             system.debug(listofnewaccount);
15             insert listofnewaccount;
16         }
17     }

    @isTest
    private static void checkbeforeinsert(){
        List<Account> listofnewaccount = new List<Account>();
        for(Integer i=0;i<10;i++){
            Account newacc = new Account();
            newacc.Name='NewAccount';
            newacc.Phone='+91 123456789'+i;
            listofnewaccount.add(newacc);
        }
        if(!listofnewaccount.isEmpty()){
            system.debug('hi2');
            system.debug(listofnewaccount);
            try{
                insert listofnewaccount;
            }
            catch(Exception e){
                system.debug('something Went Wrong');
            }
        }
    }

    @isTest
    private static void checkbeforeupdate(){
        List<Account> getaccount = [Select Id,Name,Phone From Account Where Name like '%NewAccount%'];
        if(!getaccount.isEmpty()){
            for(Account acc : getaccount){
                acc.Name='NewAccount1';
            }
            try{
                Update getaccount;
            }
            catch(Exception e){
                system.debug('something Went Wrong');
            }
        }
    }
}
}
}
```

Tests						Overall Code Coverage		
Status	Test Run	Enqueued Time	Duration	Failures	Total	Class	Percent	Lines
✓	TestRun @ 3:21:43 pm			0	2	Overall	78%	
✓	TestRun @ 3:23:07 pm			0	2	AvoidduplicatesinAccount	100%	5/5
✓	TestRun @ 3:25:14 pm			0	2	AvoidduplicatesinAccountHandler	85%	24/28
						propClass	100%	4/4
						propTrigger	0%	0/5

# Retail Management Application Using Salesforce


## Test Results:

NEW ACCOUNT

\* = Required Information

Account Information

Account Owner

 Chandu Pradeep

\* Account Name

Pc

Parent Account

Search Accounts...

Account Number

Account Site

Type

--None--

Industry

Rating

--None--

Phone

Fax

Website

Ticker Symbol

Ownership

--None--

Employees

int Owner Alias

We hit a snag.

Review the errors on this page.

Pc is Already Exist Can't Create Duplicates.