

PROJECT REPORT ON
RETAIL MANAGEMENT APPLICATION USING
SALESFORCE (DEVELOPER) - (LONG -TERM)

Introduction:

Retailing encompasses the business activities involved in selling goods and services to consumers for their personal, family, or household etc. A CRM product owner has requested to create two applications, one is a sales app for sales reps to use this application and store customers data, and the second application is a service app for service reps/agents to provide support to customers in dealing cases. To generate business on top of the customer.

Milestone-01 : Introduction & Creation Salesforce Org

⑨ Creating a developer org in salesforce

- Go to [developers.salesforce.com/Signup](https://developers.salesforce.com/signup) ○ Click on sign up.
- On the sign up form, enter the following details :
- First name & Last name : ARUNACHALAMGARI DIVIJA
- Email : divijadivi3333@gmail.com
- Role : Developer
- Company : Gayatri degree college Tirupathi
- County : India
- Postal Code : 517501
- Username : divijadivi33337@gdcproject.com
- Click on sign up after filling this

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First Name*

divija

Last Name*

Arunachalamgari

Email*

divijadivi3333@gmail.com

Role*

Developer

Company*

Gayatri degree college Tirupathi

Country/Region*

India

State/Province*

Andhra Pradesh

Postal Code*

517501

Username*

divijadivi33337@gdcproject.com

Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)

☒ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement.

salesforce

Thanks for signing up with Salesforce!

Click below to verify your account.

Verify Account

To easily log in later, save this URL:

<https://gayatridegreecollegetir-2fb-dev-ed.develop.my.salesforce.com>

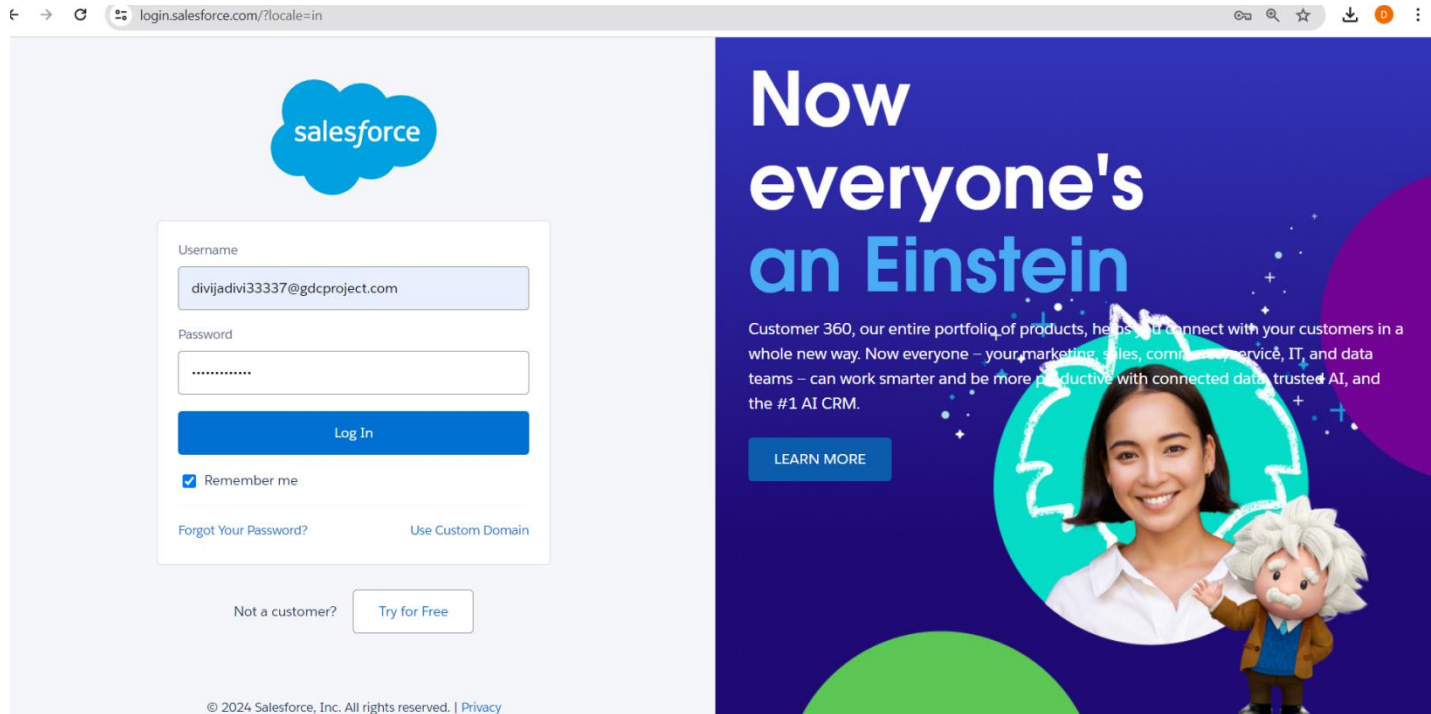
Username:

[divijadivi33337@gdcproject.com](#)

○ Login to your Salesforce Org

○ *Salesforce Login:*

<https://login.salesforce.com>



Milestone-02 : 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

○ In the same way create 2 more objects as Sales order, Dispatch/Tracking.

○ **Creation of object : 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

○ **Creation of Object : Dispatch/Tracking**

1. Click on the gear icon and then select Setup.

2. Click on the object manager tab just beside the home tab.

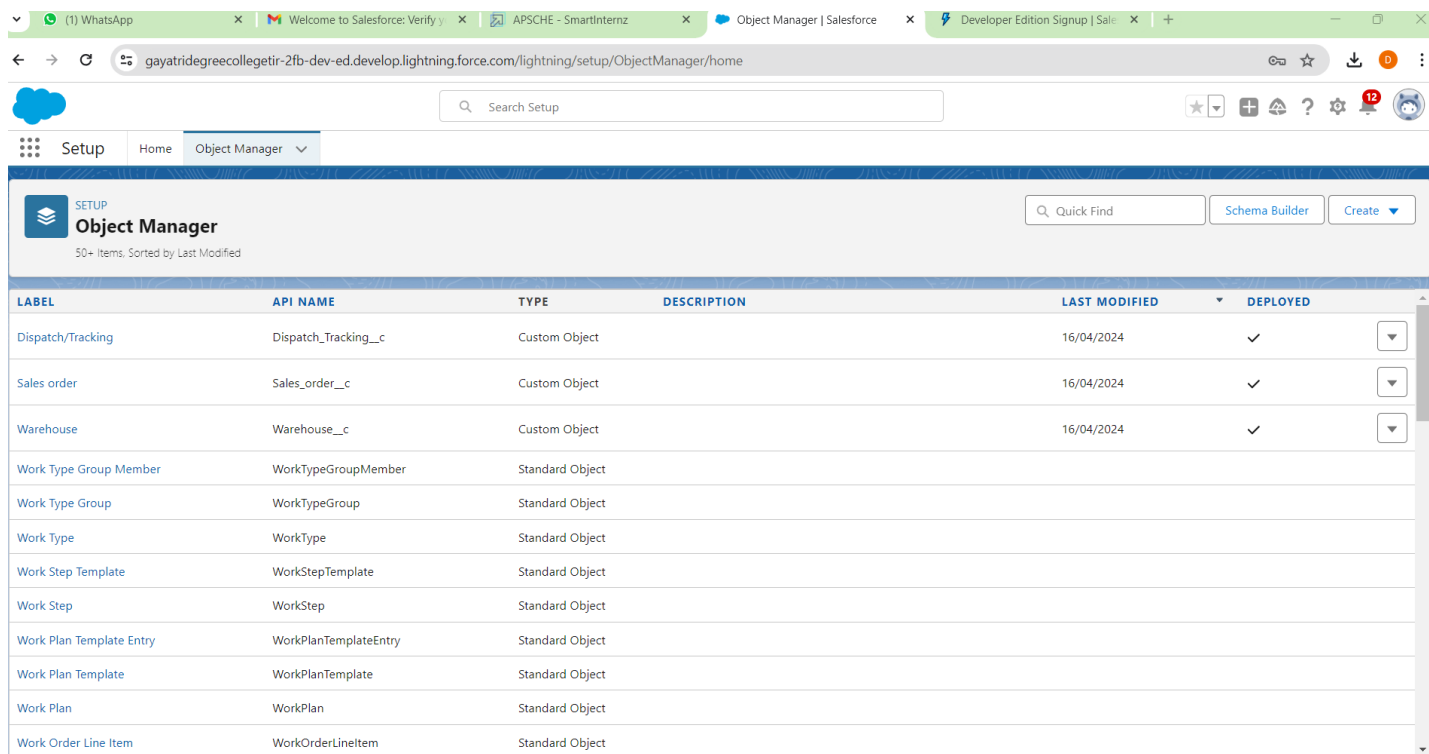
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

4. On the Custom Object Definition page, create the object as follows:

5. Label: Warehouse

6. Plural Label: Dispatch/Trackings
7. Record Name: Tracking Name
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save.

OBJECTS CREATED:



The screenshot shows the Salesforce Object Manager interface. The browser address bar indicates the URL: `gayatridegreecollegetir-2fb-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page title is "Object Manager" with a subtitle "50+ Items, Sorted by Last Modified". A search bar labeled "Quick Find" is present. Below the header is a table listing objects.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Dispatch/Tracking	Dispatch_Tracking__c	Custom Object		16/04/2024	✓
Sales order	Sales_order__c	Custom Object		16/04/2024	✓
Warehouse	Warehouse__c	Custom Object		16/04/2024	✓
Work Type Group Member	WorkTypeGroupMember	Standard Object			
Work Type Group	WorkTypeGroup	Standard Object			
Work Type	WorkType	Standard Object			
Work Step Template	WorkStepTemplate	Standard Object			
Work Step	WorkStep	Standard Object			
Work Plan Template Entry	WorkPlanTemplateEntry	Standard Object			
Work Plan Template	WorkPlanTemplate	Standard Object			
Work Plan	WorkPlan	Standard Object			
Work Order Line Item	WorkOrderLineItem	Standard Object			

Milestone-03 : What Is A Tab?

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

Create A Tab For Warehouse Object

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

A Tab For Sales order Object,Dispatch/Tracking,Warehouse

The screenshot shows the Salesforce Setup interface for Custom Tabs. The left sidebar has a search bar with 'tabs' entered and a list of navigation items including 'User Interface' and 'Tabs'. The main content area is titled 'Custom Tabs' and includes a description: '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.'

Below the description, there are three sections:

- Custom Object Tabs:** Includes a 'New' button and a 'What Is This?' link. Below is a table with columns: Action, Label, Tab Style, and Description.

Action	Label	Tab Style	Description
Edit Del	Dispatch/Tracking	Cell phone	
Edit Del	Sales orders	Camera	
Edit Del	Warehouses	Laptop	
- Web Tabs:** Includes a 'New' button and a 'What Is This?' link. Below is a message: 'No Web Tabs have been defined'.
- Visualforce Tabs:** Includes a 'New' button and a 'What Is This?' link. Below is a message: 'No Visualforce Tabs have been defined'.

Milestone-04 : 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 App Builder interface. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', and 'Sales App'. The left sidebar lists 'App Settings' with sub-items: 'App Details & Branding' (selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'.

The main content area is titled 'App Details & Branding' and includes the instruction: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.'

App Details

- * App Name: Sales App
- * Developer Name: Sales_App
- Description: Enter a description...

App Branding

- Image: Upload button
- 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

The preview shows a blue square icon with 'SA' and a grey button labeled 'Sales App'.

Milestone- 05 : 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.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options like 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, and Sharing Rules. The main content area is titled 'Dispatch/Tracking' and shows a table of fields and relationships. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are Created By, Dispatch/Tracking Name, Dispatched, Expected date of delivery, Last Modified By, Sales order, and Tracking ID.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Dispatch/Tracking Name	Name	Text(80)		✓
Dispatched	Dispatched__c	Text(40)		
Expected date of delivery	Expected_date_of_delivery__c	Text(40)		
Last Modified By	LastModifiedById	Lookup(User)		
Sales order	Sales_order__c	Master-Detail(Sales order)		✓
Tracking ID	Tracking_ID__c	Text(40)		

✚ Create A Master-Detail Relationship On Dispatch/Delivery Object

1. Select Master-Detail Relationship as the Data Type and click Next.
2. For Related to, enter Sales order.
3. Click Next.
4. For Field Label, enter Sales order.
5. Click Next, Next, Next and Save.

✚ 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.

The screenshot shows the Salesforce Setup interface. The browser address bar displays the URL: `gayatriegreecollegetir-2fb-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01f900000107uv/FieldsAndRelationships/view`. The page title is "Sales order". The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), 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, and Sharing Rules. The main content area is titled "Fields & Relationships" and shows a list of 10 items, sorted by Field Label. The list includes fields like Contact, Created By, Customer, Email id, Last Modified By, Order confirmed, Order date, Owner, Sales order Name, and Status. The Status field is highlighted in blue and is a Picklist type.

Field Label	Field Name	Data Type	Required	Field Type
Contact	Contact__c	Lookup(Contact)	✓	Lookup
Created By	CreatedById	Lookup(User)		Lookup
Customer	Customer__c	Lookup(Account)	✓	Lookup
Email id	Email_id__c	Email		Email
Last Modified By	LastModifiedById	Lookup(User)		Lookup
Order confirmed	Order_confirmed__c	Picklist		Picklist
Order date	Order_date__c	Date		Date
Owner	OwnerId	Lookup(User,Group)	✓	Lookup
Sales order Name	Name	Auto Number	✓	Auto Number
Status	Status__c	Picklist		Picklist

✚ Create A Lookup Relationship On Sales Order Object With Account Object

1. Follow steps 1 to 5 of field creation then follow below steps.

2. Select look up Relationship as the Data Type and click Next.
3. For Related to, enter Account.
4. Click Next.
5. For Field Label, enter Customer.
6. Click Next, Next, Next and Save.

The screenshot shows the Salesforce Setup interface. The breadcrumb trail is "Setup > OBJECT MANAGER". The main heading is "Sales order". On the left sidebar, "Fields & Relationships" is selected. The main content area is titled "Fields & Relationships" with a sub-header "10 Items, Sorted by Field Label". There is a "Quick Find" search bar and tabs for "New", "Deleted Fields", "Field Dependencies", and "Set History Tracking". The table below lists the fields and their relationships:

Field Label	Field Name	Data Type	Relationship	Filter
Contact	Contact__c	Lookup(Contact)	✓	▼
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(Account)	✓	▼
Email Id	Email_id__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 Name	Name	Auto Number	✓	▼
Status	Status__c	Picklist		▼

✚ Create A Lookup Relationship On Sales Order Object With Contact Object

With Use Of Lookup Filter.

1. Select look up Relationship as the Data Type and click Next.
2. For Related to, enter Contact.
3. Click Next.
4. For Field Label, enter Contact.
5. Click lookup filter.
6. Provide filter as given below & also refer picture (Screenshot of Step 6)
7. Contact: Account ID equals Sales Order: Customer

8. Click Next, Next, Next and Save.

✚ **Create Order Date Field On Sales Order**

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 Sales Order
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Date as the Data Type, click Next.
7. For Field Label, enter Order date.
8. Click Next, Next, then Save & New.

✚ **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. At the top right side you can find a new select that option.
6. Now you have to select data type as formula.
7. At the top right side you can find a new select that option.
8. Now you have to select data type as formula.

SETUP > OBJECT MANAGER

Contact

Fields & Relationships
35+ Items, Sorted by Field Label

Quick Find:

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	Accountid	Lookup(Account)		✓
Account Website	Account_Website__c	Formula (Text)		
Assistant	AssistantName	Text(40)		
Asst. Phone	AssistantPhone	Phone		
Birthdate	Birthdate	Date		
Clean Status	CleanStatus	Picklist		✓
Contact Owner	OwnerId	Lookup(User)		✓
Created By	CreatedById	Lookup(User)		
Data.com Key	Jigsaw	Text(20)		
Department	Department	Text(80)		
Description	Description	Long Text Area(32000)		

Milestone-06 : 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.

← → ↺ gayatridegreecollegeitir-2fb-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005F90000093Hkq%3Fnoredirect%3D1%26isUserEntityOverride%3D1

Setup Home Object Manager

Search Setup

use

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

Process Automation

Paused And Failed Flow

Divija Arunachalamgari

Permission Set Assignments (0) | Permission Set Assignments Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (0) | OAuth Apps (0) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0) | User Provisioning Accounts (0)

User Detail

Edit Sharing Reset Password Freeze

Name	Divija Arunachalamgari	Role	Salesforce
Alias	darun	User License	Salesforce
Email	divijadiv333@gmail.com [Verify]	Profile	Standard User
Username	divijadiv333@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17124960545219160176	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	1
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> 1
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> 1
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> 1
App Registration: One-Time Password Authenticator		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> 1

Milestone-07 : 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

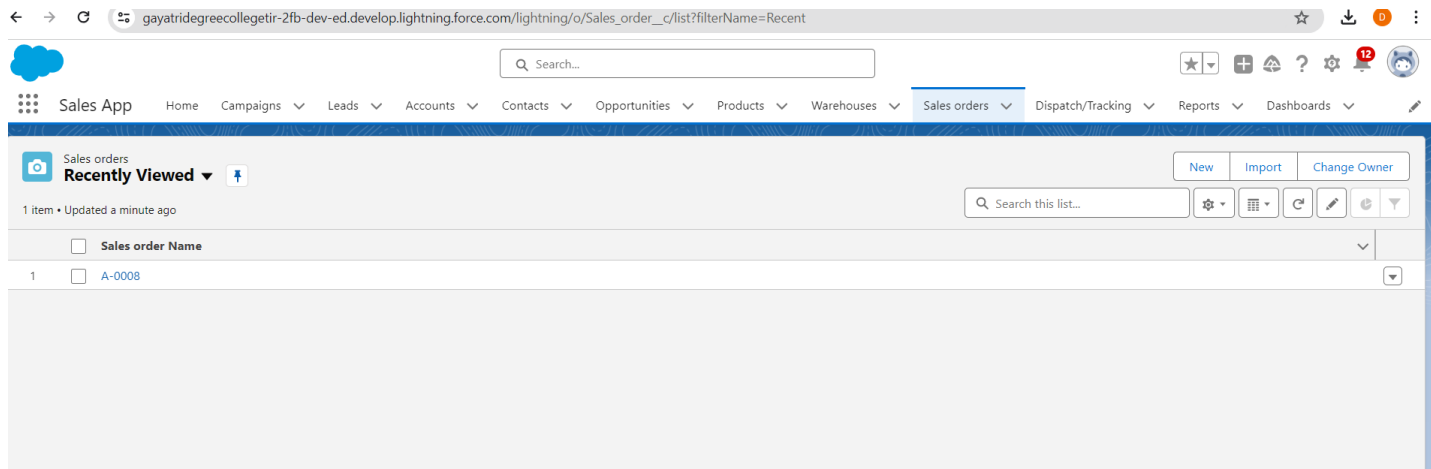
The screenshot displays the Salesforce Setup interface, specifically the 'Object Manager' section for 'Account'. The 'Validation Rules' tab is selected, showing a list of validation rules. The table contains one rule: 'phone_number_has_international_format' for the 'Account.TextName' field. The rule is active and was modified by Divija Arunachalamgari on 17/04/2024 at 11:18 am.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
phone_number_has_international_format	Account.TextName	Phone number must begin with + (country code)	✓	Divija Arunachalamgari, 17/04/2024, 11:18 am

Milestone-08 : User Adoption

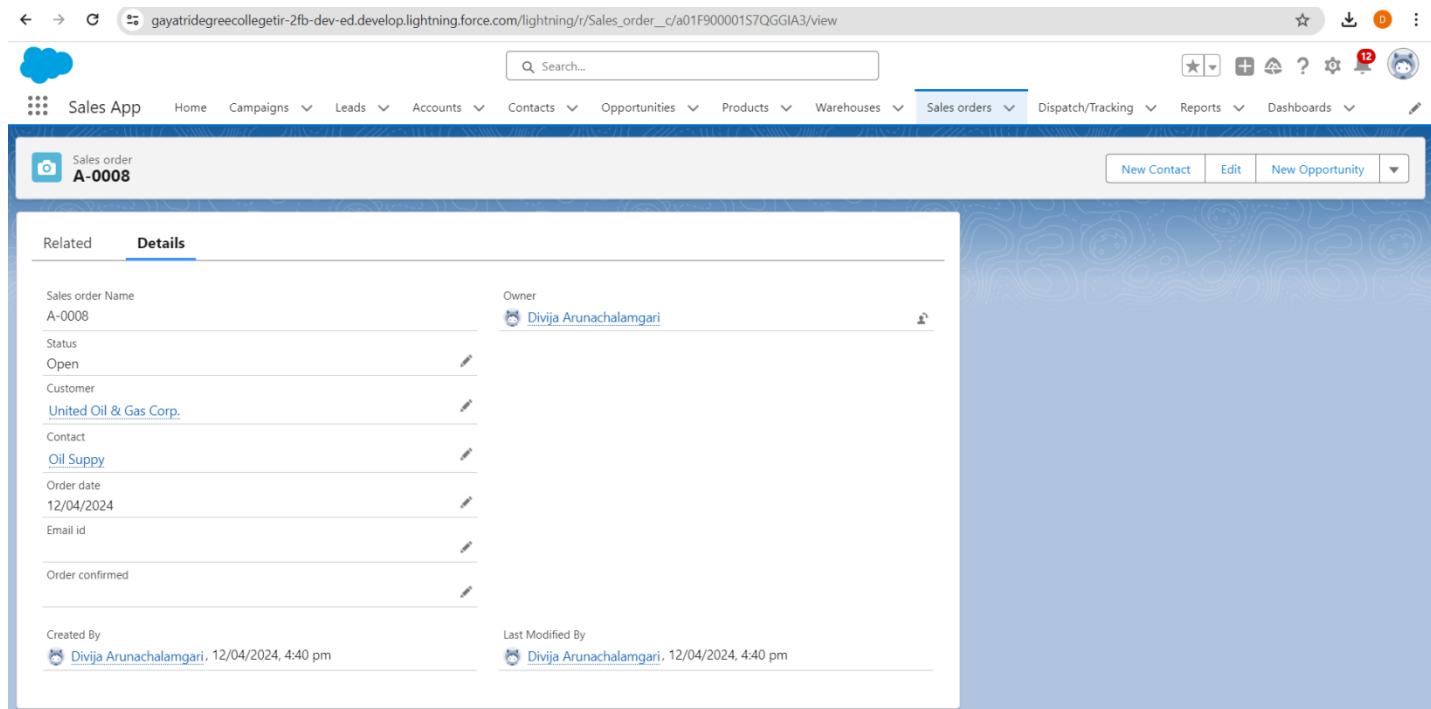
•Create Record (Sales Order)

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



•View 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 on any record name. you can see the details of the Sales Order



•Delete 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 on Arrow at right hand side on that Particular record.
5. Click delete and delete again.

Milestone-09 : Reports

•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
9. Give report name – New Sales orders with Customer Report
10. Click Save

The screenshot shows the Salesforce Lightning interface for a report. The browser address bar indicates the URL: `gayatridgecollegetir-2fb-dev-ed.develop.lightning.force.com/lightning/r/Report/00OF9000006ls9dMAA/view?queryScope=userFolders`. The page title is "Report: Sales orders with Customer" and the report name is "New Sales orders with Customer Report". The report is displayed in a table format with the following data:

Customer: Account Name	Sales order: Sales order Name
United Oil & Gas Corp. (1)	A-0008
Subtotal	
Total (1)	

The interface includes a search bar, navigation tabs (Sales App, Home, Campaigns, Leads, Accounts, Contacts, Opportunities, Products, Warehouses, Sales orders, Dispatch/Tracking, Reports, Dashboards), and a sidebar with various report controls like "Enable Field Editing", "Add Chart", and "Edit".

•View Report

1. Click on App Launcher on left side of screen.
2. Search “Sales App” & click on it.
3. Click on Reports Tab.
4. Click on New Sales orders with Customer Report and see records.

Milestone-10 : 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

gayatridgecollegetir-2fb-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru

Sales App Home Campaigns Leads Accounts Contacts Opportunities Products Warehouses Sales orders Dispatch/Tracking Reports Dashboards

Dashboards Recent 1 item

Search recent dashboards... New Dashboard New Folder

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Sales App Dashboard		Private Dashboards	Divija Arunachalamgari	12/4/2024, 4:43 pm	

Created by Me Private Dashboards All Dashboards

FOLDERS All Folders Created by Me Shared with Me

FAVORITES All Favorites

✚ View Dashboard

1. Click on App Launcher on left side of screen.
2. Search Sales App & click on it.
3. Click on Dashboard Tab.
4. Click on Sales App Dashboard and see graph view of records

gayatridgecollegetir-2fb-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01ZF9000000bapgMAA/view?queryScope=userFolders

Sales App Home Campaigns Leads Accounts Contacts Opportunities Products Warehouses Sales orders Dispatch/Tracking Reports Dashboards

Dashboard Sales App Dashboard Last refreshed 4 days ago. Refresh this dashboard to see the latest data. As of 12-Apr-2024, 4:51 pm Viewing as Divija Arunachalamgari

Refresh Edit Subscribe

New Sales orders with Customer Report

Record Count

1 0.5 0

United Oil & Gas Corp.

Customer: Account Name

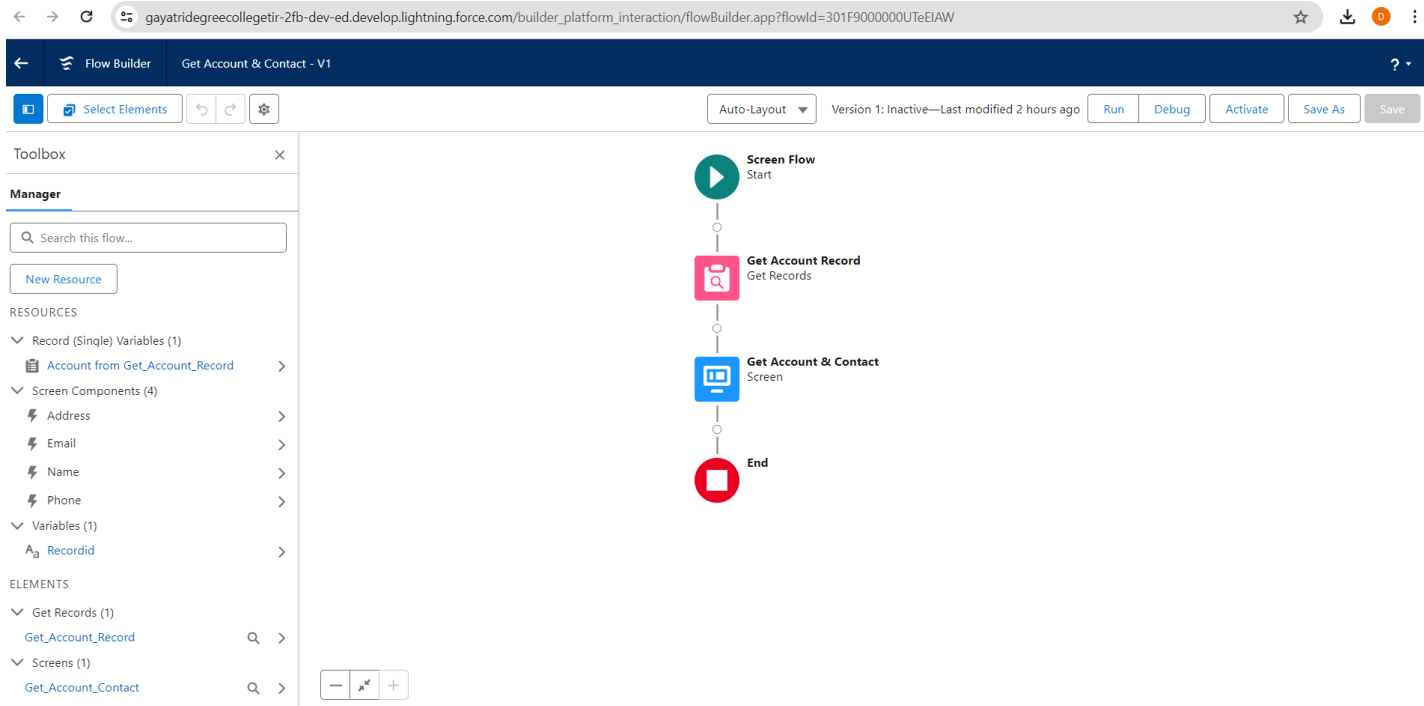
View Report (New Sales orders with Customer Report)

Milestone-11 : Flows

✚ Create Flow

1. Click on setup gear
 2. In quick find search for Flows
 3. Choose new flow option at right side of the page
 4. Now select screen flow as a new flow
 5. Left side corner of the page you can find a toggle click on that and select a new resource
 6. and select resource type has variable
 7. Give api name as Recordid
 8. and select data type as Text
 9. At bottom for Availability outside the flow check the box as Available for Input
 10. Click on done
1. Now below the start button click on add element and choose Get Records
 - a. Now give the label name as Get Account Record
 - b. For Get record of object choose object as - Account
 - c. For Filter account records condition requirements are - All conditions are met
 - d. Field- Account id Operator- equals Value- Recordid (variable which we had created)
 - e. For how many records to share - Only the first record
 - f. How to store record data- Automatically stores all fields.
 - g. Click on done.
 - h. Now again add the element below the Get account record and select Screen as your element
 - i. Give the label name as Get Account & Contacts
 - j. Left side in the component section search for Name and drag it to the screen

- k. Give the api name as Name
- l. Now drag Email from component section and move it to the screen
- m. Give the Api name- Email
- n. Required - `!$GlobalConstant.True`
- o. Now drag the Phone from component to screen below the email
- p. Give the Api name as - Phone
- q. Required- `!$GlobalConstant.True`
- r. Now Drag Address from component section to screen
- s. Give the Api name as - Address
 - i. City Value- `!Get_Account_Record.ShippingCity`
 - ii. Country Value- `!Get_Account_Record.BillingCountry`
 - iii. Postal code- `!Get_Account_Record.ShippingPostalCode`
 - iv.State/province value- `!Get_Account_Record.ShippingState`
 - v. Street Value- `!Get_Account_Record.ShippingStreet`
 - vi. Click on done and save it. Give the label name as Get Account & Contact

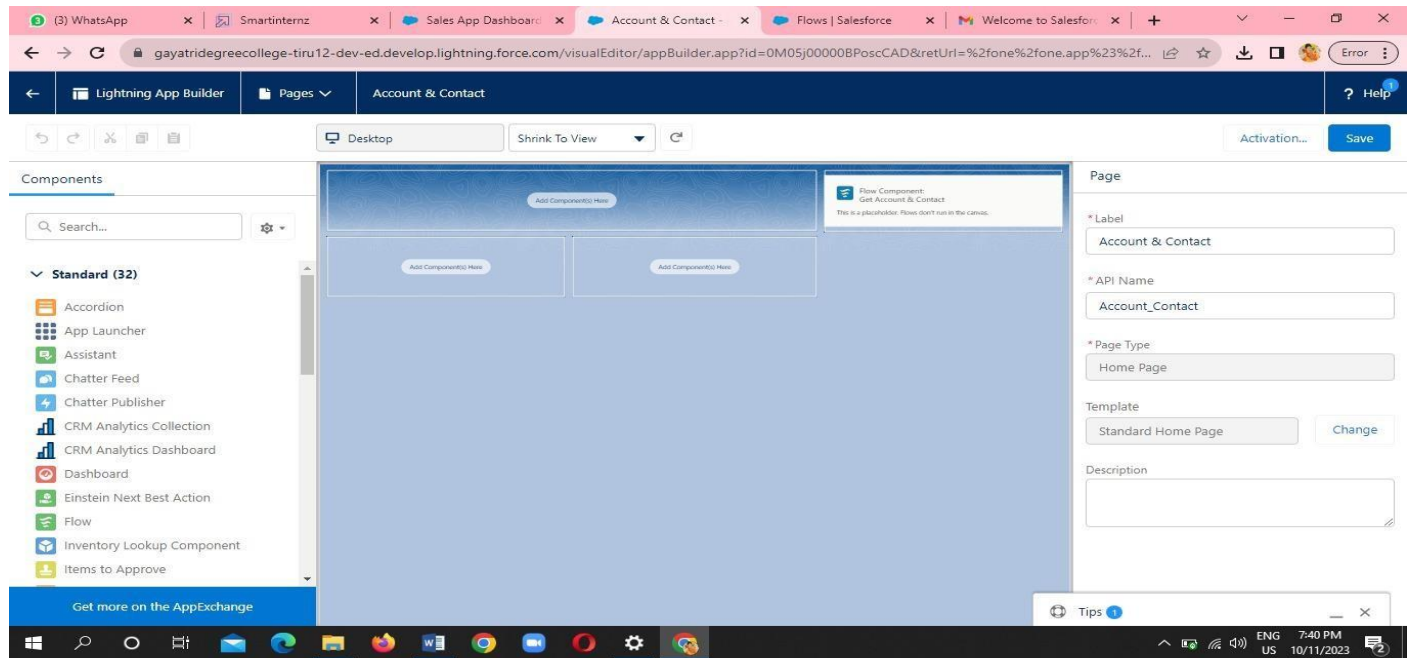


✚ To Create Lightning Home Page

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 Send An Email Alert To The Customer Once Order Is Confirmed

- Navigate to setup click on object manager
- Select sales order as object
- click on fields and relationships
- Select Email id field and click on edit
- Than in general options select Required Field
- Save it

← → ↻ gayatridegreecollegeitir-2fb-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011F900000107uv/FieldsAndRelationships/page?address=%2F00NF9000008NDAQ%2Fe%3FretURL... ☆ ⬇ 0 ⋮

Setup Home Object Manager

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

Scoping Rules

Custom Field Definition Edit [Change Field Type](#) [Save](#) [Cancel](#)

Field Information ! = Required Information

Field Label Data Type Email

Field Name

Description

Help Text

Data Owner

Field Usage

Data Sensitivity Level

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen:

General Options

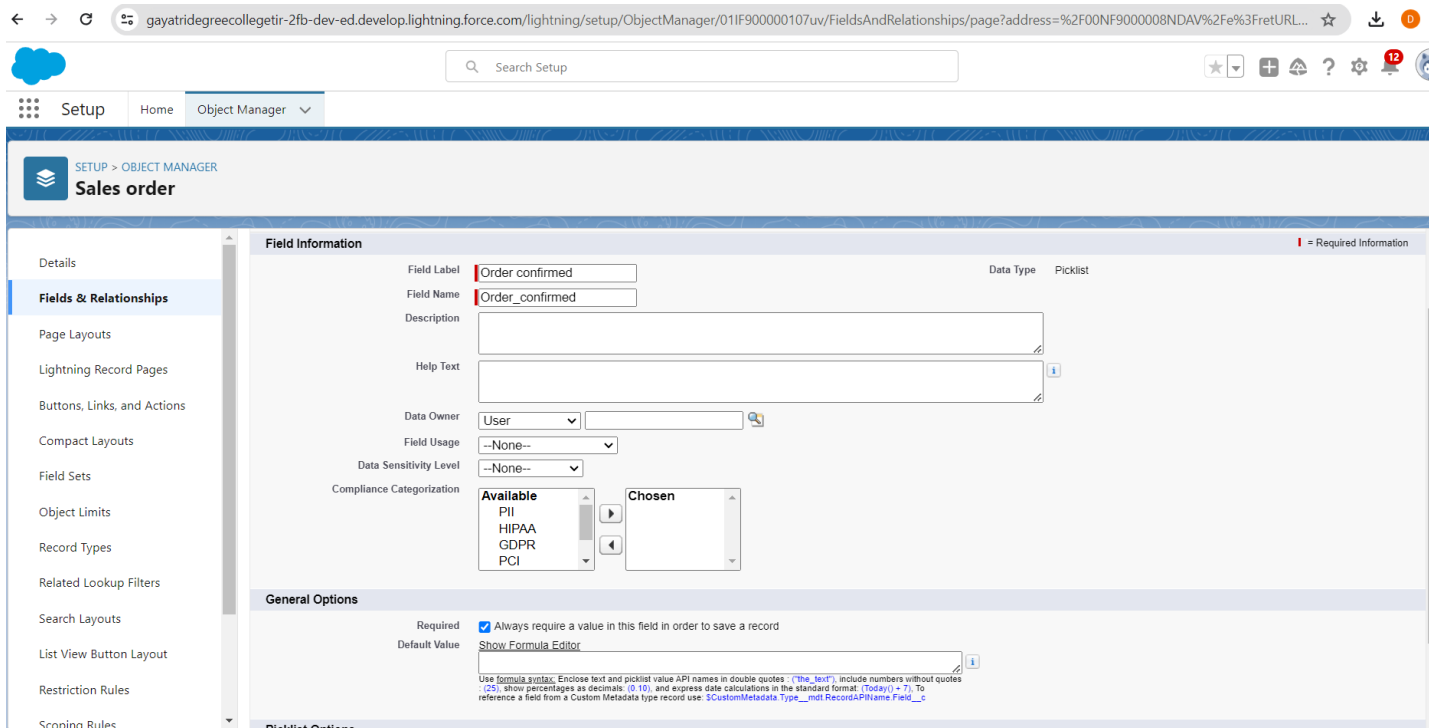
Required ☒ Always require a value in this field in order to save a record

Unique ☐ Do not allow duplicate values

External ID ☐ Set this field as the unique record identifier from an external system

Default Value [Show Formula Editor](#)

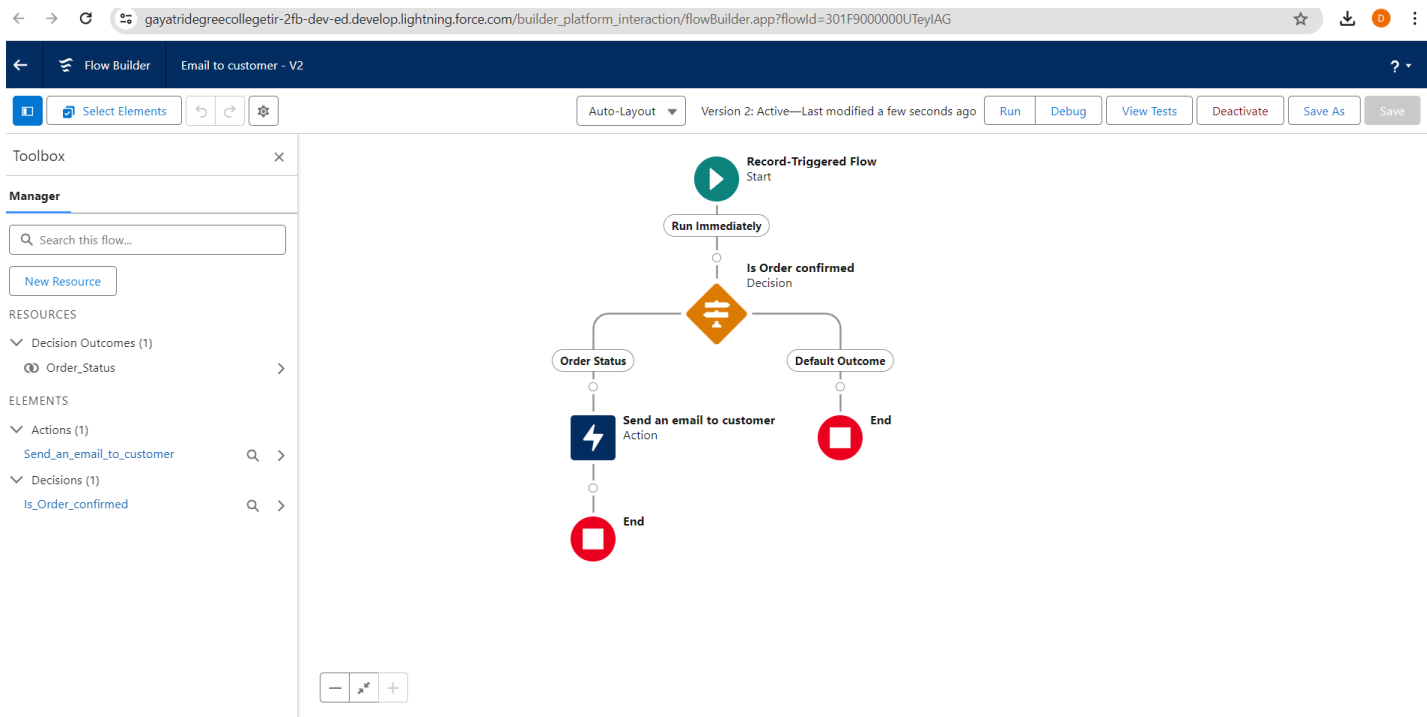
- g. Now Create a new field Order confirmed
- h. On the same object sales order create a Picklist field.
- i. Give the label name as Order confirmed.
- j. And in Values give 1) Yes
- 2) No
- k. Make it as Required field.



✚ To Create Record Trigger 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 Records
11. Now click on add element and in Logic section select Decision element
12. Give the element name as Is Order confirmed
13. In Outcome Details Label as Order Status
14. In condition requirement All Conditions are Met

15. In resource select \$Record than field as Order confirmed
16. Operator - Equals
17. Value as Yes
18. Click on done
19. Now Below the Order status Click on add element and select Action as your element.
20. Now in action select Send email
21. Give the label as Send an email to customer
22. Now in body select \$Record and than select Id
23. Now in body select \$Record and than select Id
24. Move your cursor to front before \$record and give the text as Hi Your order with than comes \$record is confirmed
25. In recipients email address list - select Record and than Email id as your field
26. In subject give it as - Order confirmed.
27. Click on done.
28. Save the flow as Email to customer
29. And activate the flow.



Milestone-12 : Triggers

✚ Trigger On Account To Prevent Duplicate Name

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

CODE:

```

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');
            }
        }
    }
}

```

The screenshot shows the Salesforce Developer Console interface. The top bar indicates the browser is Google Chrome and the URL is `gayatridegreecollegitir-2fb-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage`. The menu bar includes File, Edit, Debug, Test, Workspace, and Help. The active tab is `ToAvoidDuplicateHandler.apxc`. Below the tab, there are options for Code Coverage (None) and API Version (60). The main editor displays the following Apex code:

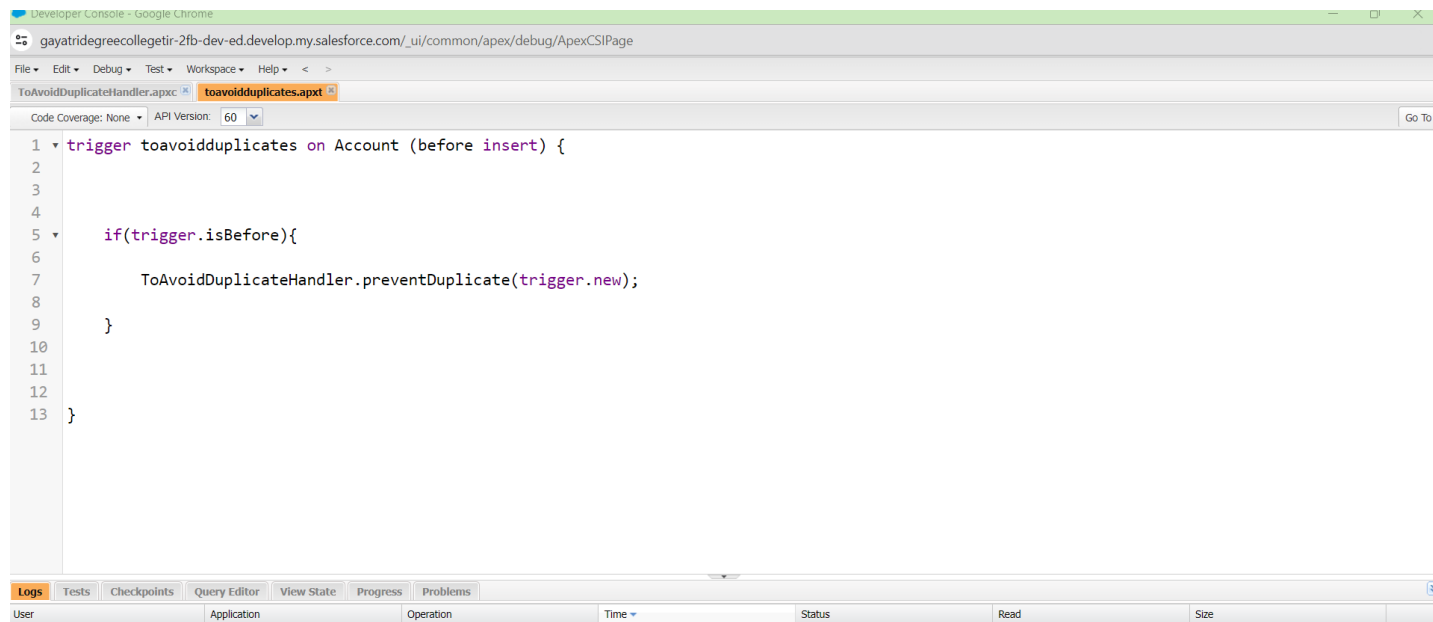
```
1 public class ToAvoidDuplicateHandler {
2
3
4
5     public static void preventDuplicate(list<Account> acclist){
6
7         for (Account a : acclist){
8
9             for (Account a1 : [Select id,name from Account]){
10
11                 if(a.name == a1.name){
12
13                     a.name.addError('This is a duplicate name');
14
15                 }
16
17             }
18
19         }
20 }
```

At the bottom, there are tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The Logs tab is active, showing a table with columns: User, Application, Operation, Time, Status, Read, and Size.

Filter Click here to filter the log list

✚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. Subject as Account.



☐ Filter [Click here to filter the log list](#)

CODE:

```
trigger toavoidduplicates on Account (before insert) {  
    if(trigger.isBefore){  
        ToAvoidDuplicateHandler.preventDuplicate(trigger.new);  
    }  
}
```

THE END