

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 : PALLAM PRAVALIKA
- Email : pravpravalika2020@gmail.com
- Role : Developer
- Company : Gayatri degree college Tirupathi
- County : India
- Postal Code : 517501
- Username : pravpravalika20207@gdcproject.com
- Click on sign up after filling this

← → ↻ 🔍 developer.salesforce.com/signup

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

First Name*
Pravalika

Last Name*
Pallam

Email*
pravpravalika2020@gmail.com

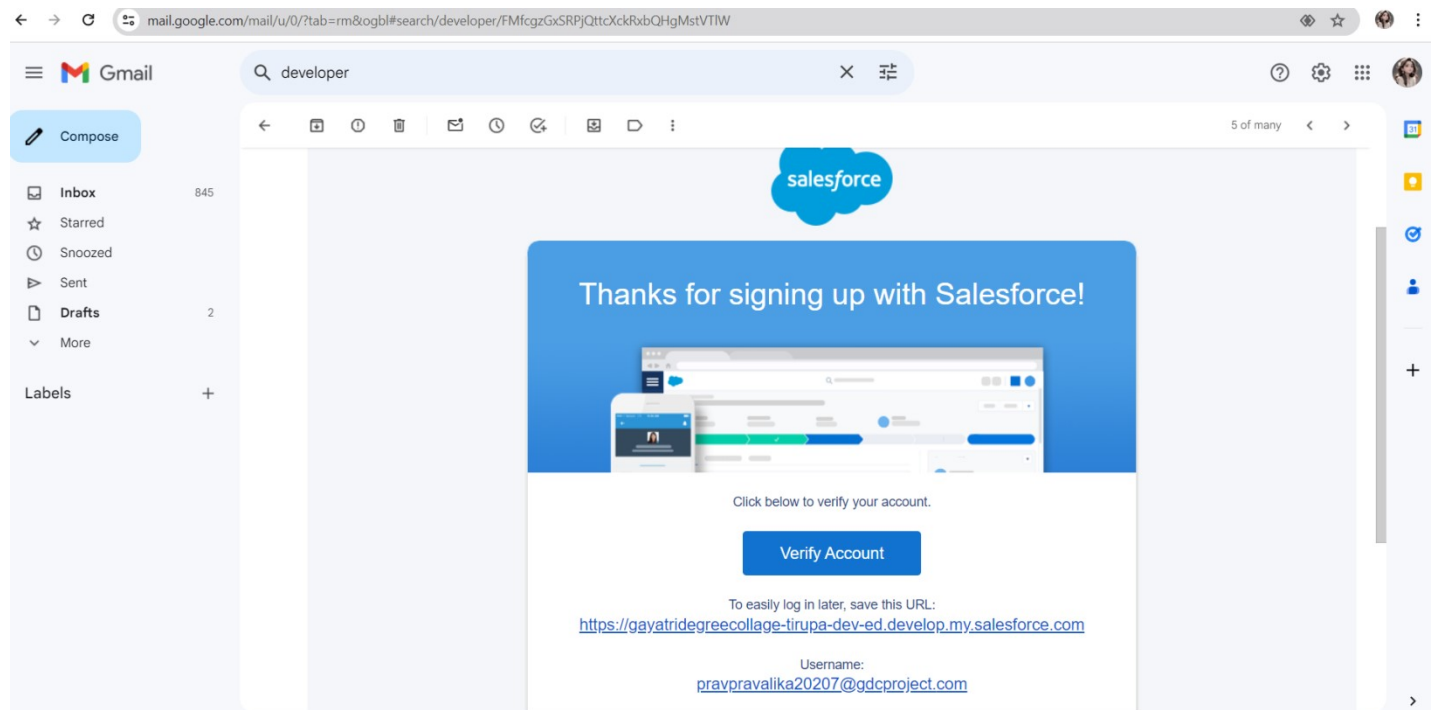
Role*
Developer

Company*
Gayatri degree college Tirupathi

Country/Region*
India

State/Province*
Andhra Pradesh

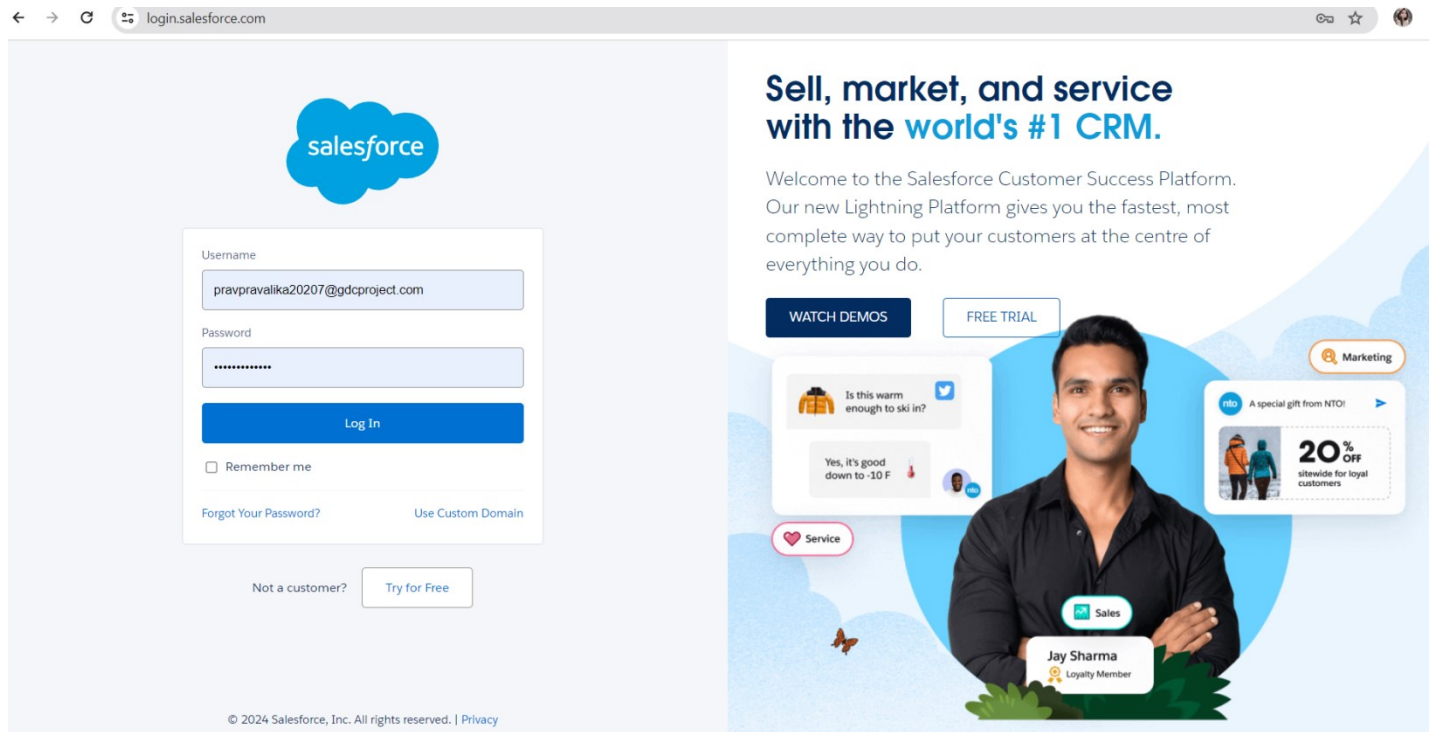
Postal Code*
517501



○ 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**

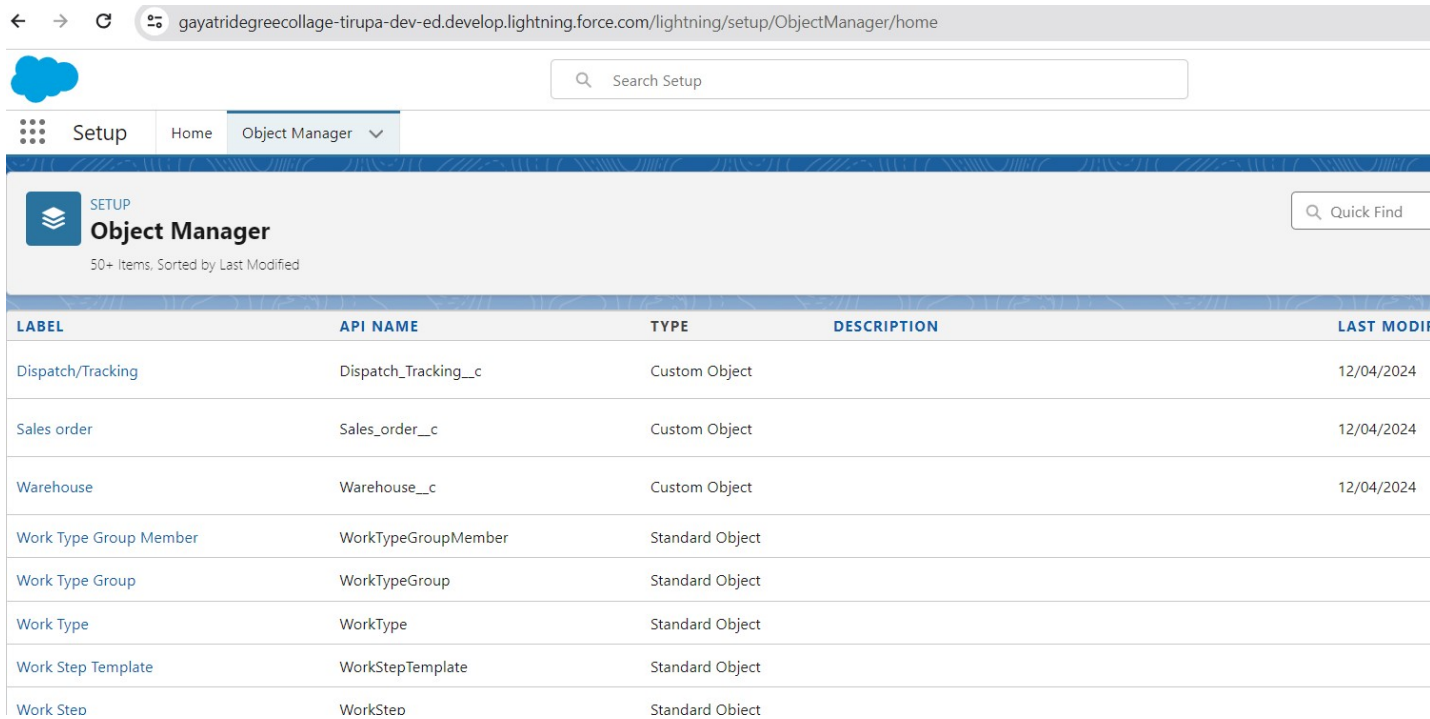
1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as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



LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIF
Dispatch/Tracking	Dispatch_Tracking__c	Custom Object		12/04/2024
Sales order	Sales_order__c	Custom Object		12/04/2024
Warehouse	Warehouse__c	Custom Object		12/04/2024
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		

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. The browser address bar displays the URL: `gayatridegreecollage-tirupa-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home`. The left sidebar contains a search bar with the text "tabs" and a list of items under "User Interface", including "Rename Tabs and Labels" and "Tabs". The main content area is titled "Custom Tabs" and includes a sub-header "SETUP Tabs". Below this, there is a descriptive text block and two sections: "Custom Object Tabs" and "Web Tabs". The "Custom Object Tabs" section contains a table with three rows of tabs: "Dispatch/Tracking" (Bottle style), "Sales orders" (Cup style), and "Warehouses" (Car style). Each row has "Edit" and "Delete" links. The "Web Tabs" section is currently empty.

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 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 Experience and the mobile app.

Action	Label	Tab Style
Edit Del	Dispatch/Tracking	Bottle
Edit Del	Sales orders	Cup
Edit Del	Warehouses	Car

Web Tabs

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 'App Details & Branding' configuration page in the Lightning App Builder. 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 divided into two columns: 'App Details' and 'App Branding'.

App Details:

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

App Branding:

- Image:** A placeholder box with an 'Upload' button.
- Primary Color Hex Value:** #0070D2
- Org Theme Options:** A checkbox labeled 'Use the app's image and color instead of the org's custom theme' is currently unchecked.
- App Launcher Preview:** A preview showing a blue square with 'SA' and a grey rectangle with '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.

← → ↺ gayatridegreecollage-tirupa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IIR000001Rc6B/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Dispatch/Tracking

Details

Fields & Relationships
7 Items, Sorted by Field Label

Quick Find New Deleted Fields

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
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)	

Related Lookup Filters

✚ 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.

← → ↻ gayatridgeecollage-tirupa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IIR000001Rc66/FieldsAndRelationships/view

 Search Setup

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

Fields & Relationships
10 Items, Sorted by Field Label

Quick Find New Deleted Fields

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

✚ 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.

✚ **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.

← → ↻ gayatridgeecollage-tirupa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IIR000001Rc66/FieldsAndRelationships/view

 Search Setup

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

Fields & Relationships
10 Items, Sorted by Field Label


Quick Find New Deleted Fields

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

✚ 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.

← → ↺ gayatridegreecollage-tirupa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Contact/FieldsAndRelationships/view

 Search Setup

Setup Home Object Manager ▾

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

Fields & Relationships
35+ Items, Sorted by Field Label

Quick Find New Deleted Fields

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
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)	

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.

← → ↻ 🌐 gayatridegrecollage-tirupa-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005IR00000EfzUy%3FnoRedirect%3D1%26isUserEntityOver

🌩️ Setup Home Object Manager ▾

🔍 user

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**

Feature Settings

- ▼ Data.com
- Prospector Users
- ▼ Service

SETUP Users

User Pravalika Pallam

[Permission Set Assignments \(1\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Personal Groups \(0\)](#) | [Pa](#)

[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 His](#)

User Detail Edit Sharing Change Password


Name	Pravalika Pallam	Role	
Alias	PPall	User License	Salesforce
Email	pravpravalika2020@gmail.com [Verified]	Profile	System Administrator
Username	pravpravalika20207@gdcproject.com	Active	✓
Nickname	pravpravalika20207 ⓘ	Marketing User	✓
Title		Offline User	✓
Company	Gayatri degree collage -tirupati	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	✓
Address	IN	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>

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

← → ↺ 🌐 gayatridegrecollage-tirupa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/ValidationRules/view

 Search Setup

Setup Home Object Manager ▾

 SETUP > OBJECT MANAGER
Account

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters

Validation Rules
1 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED
phone_number_has_international_format	Account.TextName	Phone number must begin with + (country code)	✓	Pravalika Pai

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

The screenshot shows the Salesforce Sales App interface. The top navigation bar includes 'Sales App', 'Home', 'Campaigns', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Products', 'Warehouses', 'Sales orders', and 'Dispatch/Tracking'. The 'Sales orders' tab is selected. Below the navigation bar, there's a 'Sales orders' header with a 'Recently Viewed' filter. A search bar is present with the text 'Search this list...'. Below the search bar, a table lists one item: 'Sales order Name' with the value 'C-0001'.

	Sales order Name
1	C-0001

•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

The screenshot shows the Salesforce Sales App interface with the 'Details' view for Sales order C-0001. The top navigation bar is the same as the previous screenshot. The 'Sales orders' tab is selected. Below the navigation bar, there's a 'Sales order' header with the value 'C-0001'. A search bar is present with the text 'Search...'. Below the search bar, there's a 'Details' section with a table of fields and their values. The fields are: Sales order Name (C-0001), Status (Open), Customer (United Oil & Gas Corp.), Contact (oil supply), Order date (13/04/2024), Email id, Order confirmed, Created By (Pravalika Pallam, 13/04/2024, 7:48 pm), and Last Modified By (Pravalika Pallam, 13/04/2024, 7:48 pm).

Related	Details
Sales order Name	C-0001
Status	Open
Customer	United Oil & Gas Corp.
Contact	oil supply
Order date	13/04/2024
Email id	
Order confirmed	
Created By	Pravalika Pallam , 13/04/2024, 7:48 pm
Last Modified By	Pravalika Pallam , 13/04/2024, 7:48 pm

•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

← → ↺ gayatridegreecollage-tirupa-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

 **Sales App** Home Campaigns ▾ Leads ▾ Accounts ▾ Contacts ▾ Opportunities ▾ Products ▾ Warehouses ▾ Sales orders ▾ Dispatch/Tracking ▾

Reports
Recent
1 item

Q Search...


Q Search recent reports...



REPORTS	Report Name ▾	Description ↑ ▾	Folder ▾	Created By ▾	Created On
Recent	New Sales orders with Customer Report		Private Reports	Pravalika Pallam	13/4/2024, 7:53 pm
Created by Me					
Private Reports					
Public Reports					
All Reports					
FOLDERS					
All Folders					
Created by Me					

•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.

← → ↺ gayatridegreecollage-tirupa-dev-ed.develop.lightning.force.com/lightning/r/Report/00OIR0000085FYP2A2/view?queryScope=userFolders

 **Sales App** Home Campaigns ▾ Leads ▾ Accounts ▾ Contacts ▾ Opportunities ▾ Products ▾ Warehouses ▾ Sales orders ▾ Dispatch/Tracking ▾

 Report: Sales orders with Customer
New Sales orders with Customer Report [Enable Field Editing](#) 

Total Records
1


<input type="checkbox"/> Customer: Account Name ↑ ▾	Sales order: Sales order Name ▾
<input type="checkbox"/> United Oil & Gas Corp. (1)	C-0001
Subtotal	
Total (1)	

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

← → ↺ gayatridegreecollage-tirupa-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 ▾

Dashboards
Recent
1 item

Q Search...


Q Search recent dashboards...


DASHBOARDS	Dashboard Name ▾	Description ▾	Folder ▾	Created By ▾	Created On
Recent	Sales App Dashboard		Private Dashboards	Pravalika Pallam	13/4/2024, 7:54 pm
Created by Me					
Private Dashboards					
All Dashboards					
FOLDERS					
All Folders					
Created by Me					
Shared with Me					

✚ 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

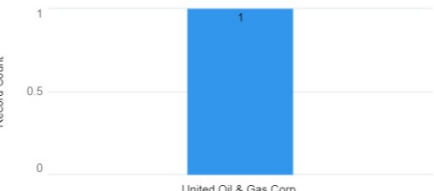
← → ↺ gayatridegreecollage-tirupa-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01ZIR000001laFV2A0/view?queryScope=userFolders ☆

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

 **Sales App Dashboard**
As of 18-Apr-2024, 3:14 pm Viewing as Pravalika Pallam

Refresh Edit Subscribe

New Sales orders with Customer Report



Record Count

United Oil & Gas Corp.

Customer: Account Name

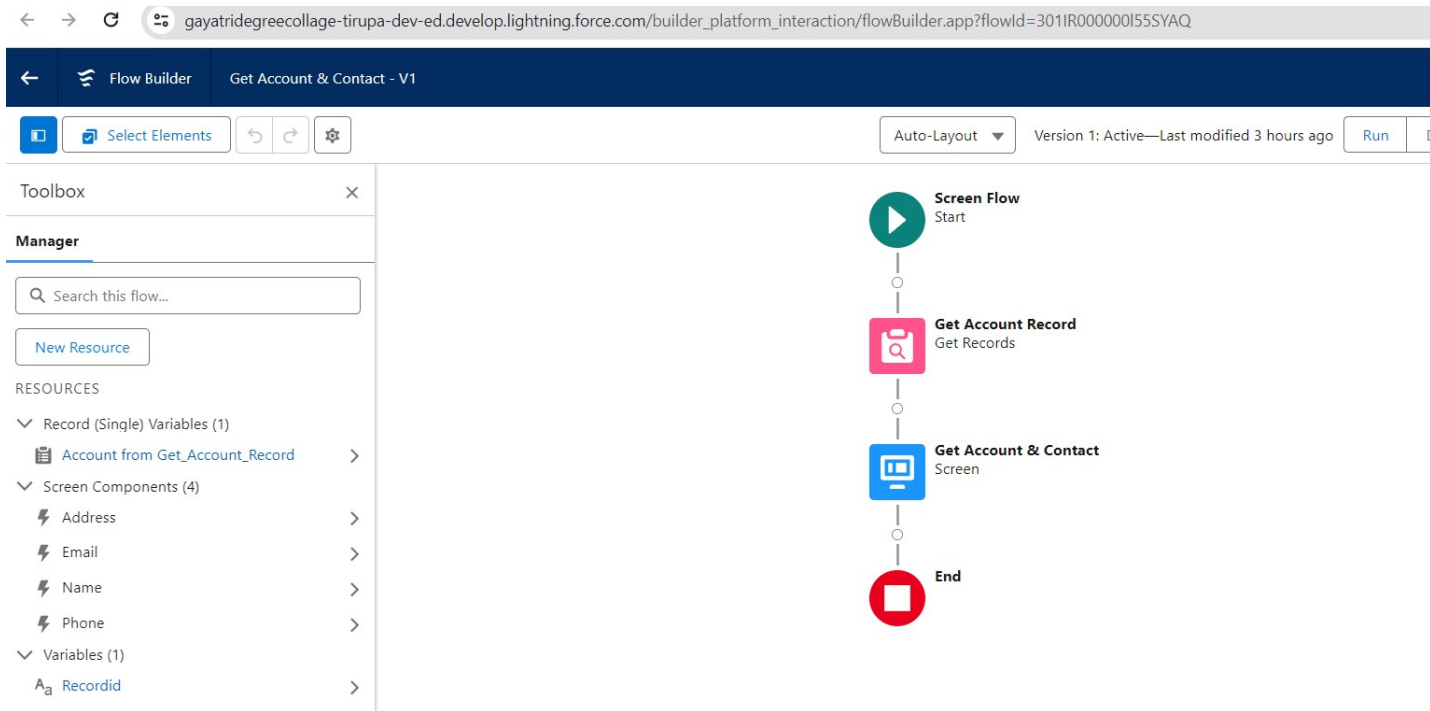
View Report (New Sales orders with Customer Report)

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

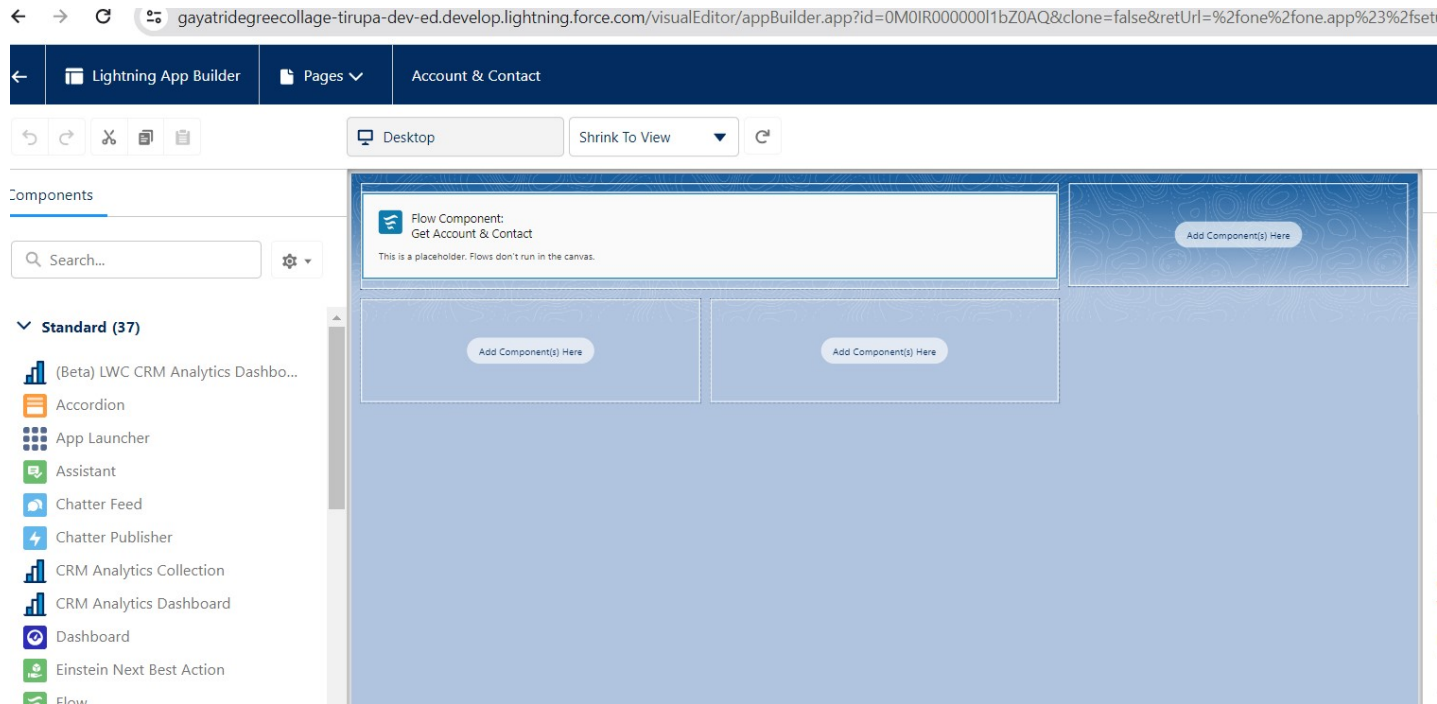


✚ To Create Lightning Home Page

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

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

← → ↺ gayatridegreecollage-tirupa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011IR000001Rc66/FieldsAndRelationships/page?address=%2F00NIR000001Rc66

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

Edit Sales order Custom Field
Email id

Custom Field Definition Edit Change Field Type Save Cancel

Field Information

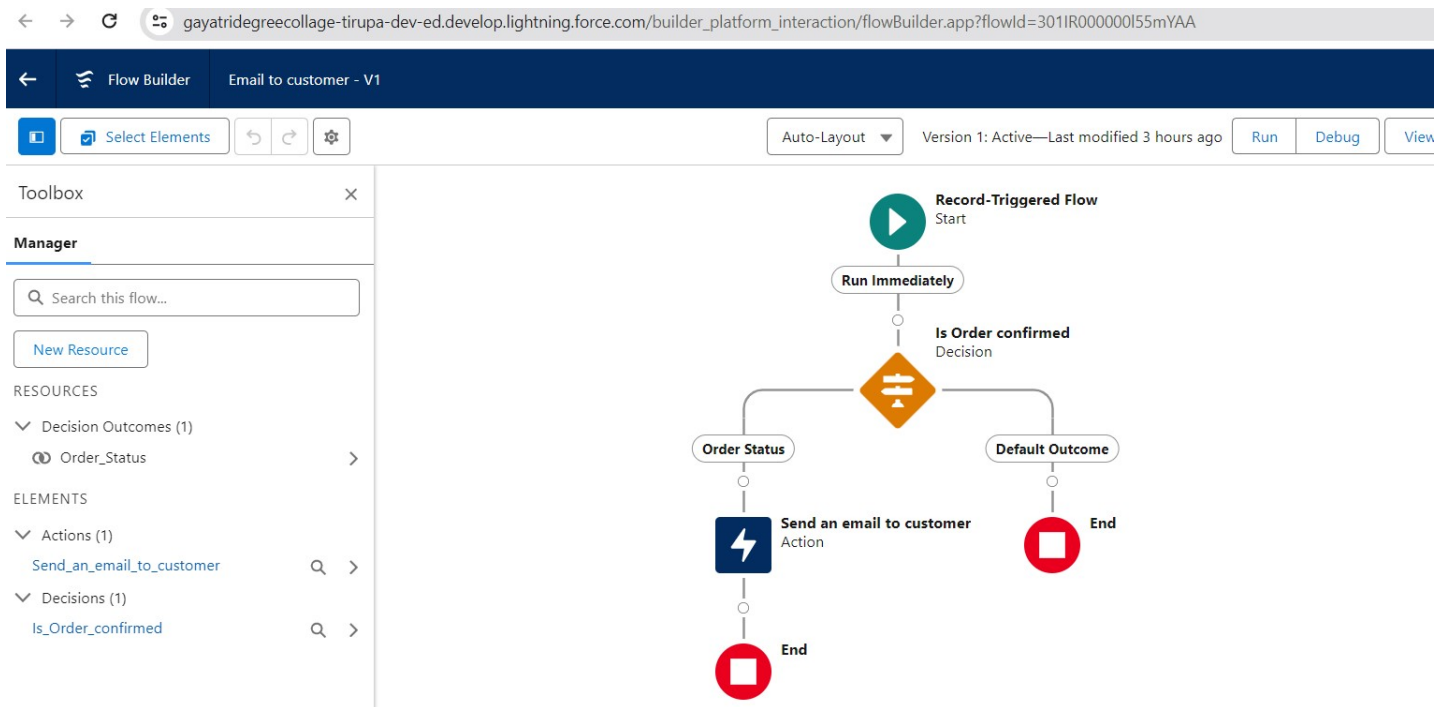
Field Label	Email id	Data Type	Email
Field Name	Email_id		
Description			
Help Text			
Data Owner	User		
Field Usage	--None--		
Data Sensitivity Level	--None--		
Compliance Categorization			

k. Make it as Required field.

✚ To Create Record Trigger Flow

1. Click on setup and search for flows.
2. Then 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');
            }
        }
    }
}

```

gayatridegrecollage-tirupa-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File Edit Debug Test Workspace Help < >

ToAvoidDuplicateHandler.apxc

Code Coverage: None API Version: 60

```
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     }
```

⚙️ 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.

gayatridegrecollage-tirupa-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File Edit Debug Test Workspace Help < >

ToAvoidDuplicateHandler.apxc

toavoidduplicates.apxt

Code Coverage: None API Version: 60

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

CODE:

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

THE END