

**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 : PEDDINTIGARI MOUNIKA
- Email : [mounikapeddintigari@gmail.com](mailto:mounikapeddintigari@gmail.com)
- Role : Developer
- Company : Gayatri degree college Tirupathi
- County : India
- Postal Code : 517501
- Username : [mounikapeddintigari5@gdcproject.com](mailto:mounikapeddintigari5@gdcproject.com)
- Click on sign up after filling this

WhatsApp | Home | Salesforce | Developer Edition Signup | Salesforce | Welcome to Salesforce: Verify

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\*  
mounika

Email\*  
mounikapeddIntlgar@gmail.com

Role\*  
Developer

Company\*  
gayatri degree college tirupati

Country/Region\*  
India

State/Province\*  
Andhra Pradesh

Postal Code\*  
517501

Username\*  
mounikapeddIntlgar15@gcdproject.com

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mail.google.com/mail/u/0/?tab=rm&ogbl#inbox/FMfcgzGxSRPjQtcfDtTbSTGssDfhQd

Compose

Inbox 4

Starred

Snoozed

Sent

Drafts 1

More

Labels +

## Thanks for signing up with Salesforce

Click below to verify your account.

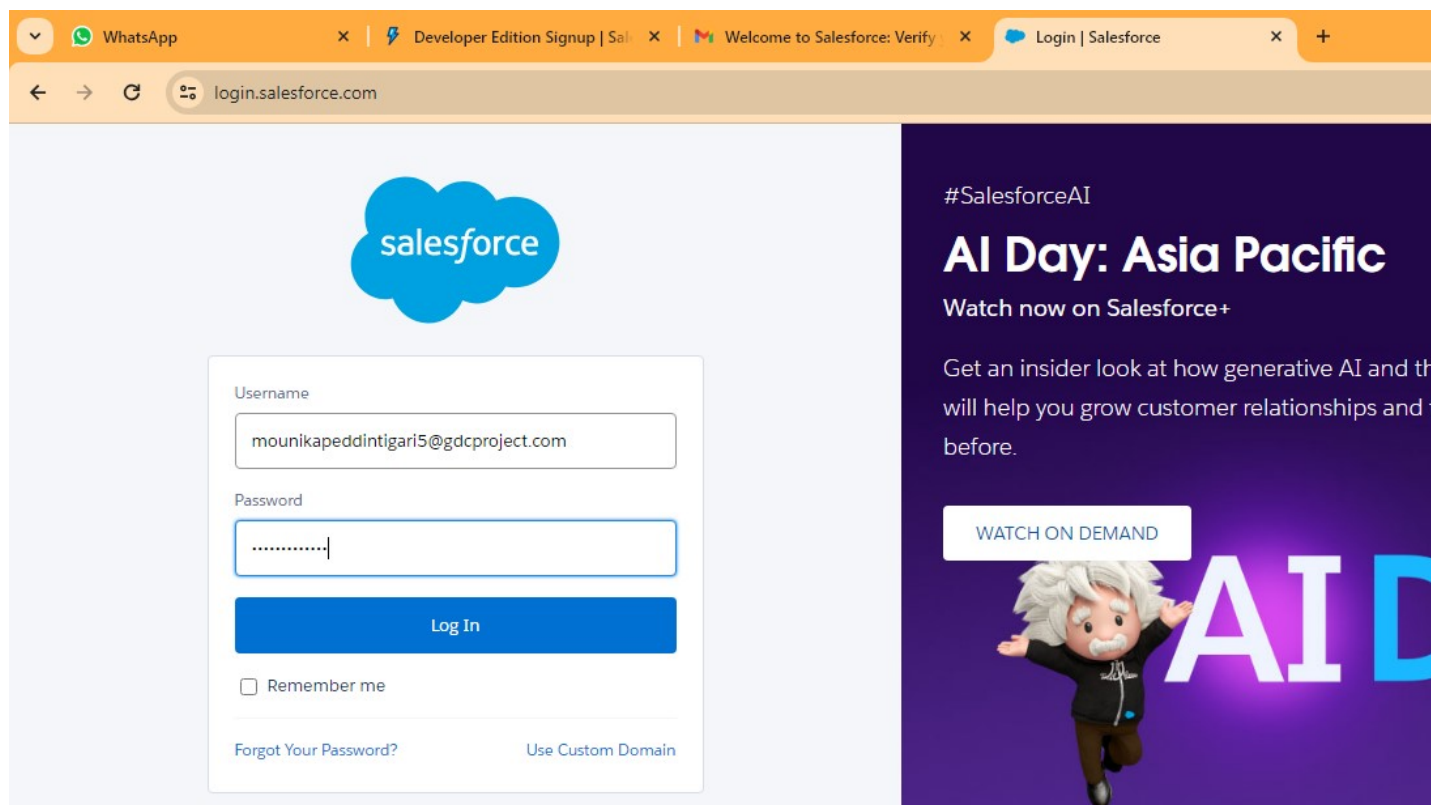
[Verify Account](#)

To easily log in later, save this URL:

<https://gayatridegreecollege-tiru-a-dev-ed.develop.my.salesforce.com>

Username:

- 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**

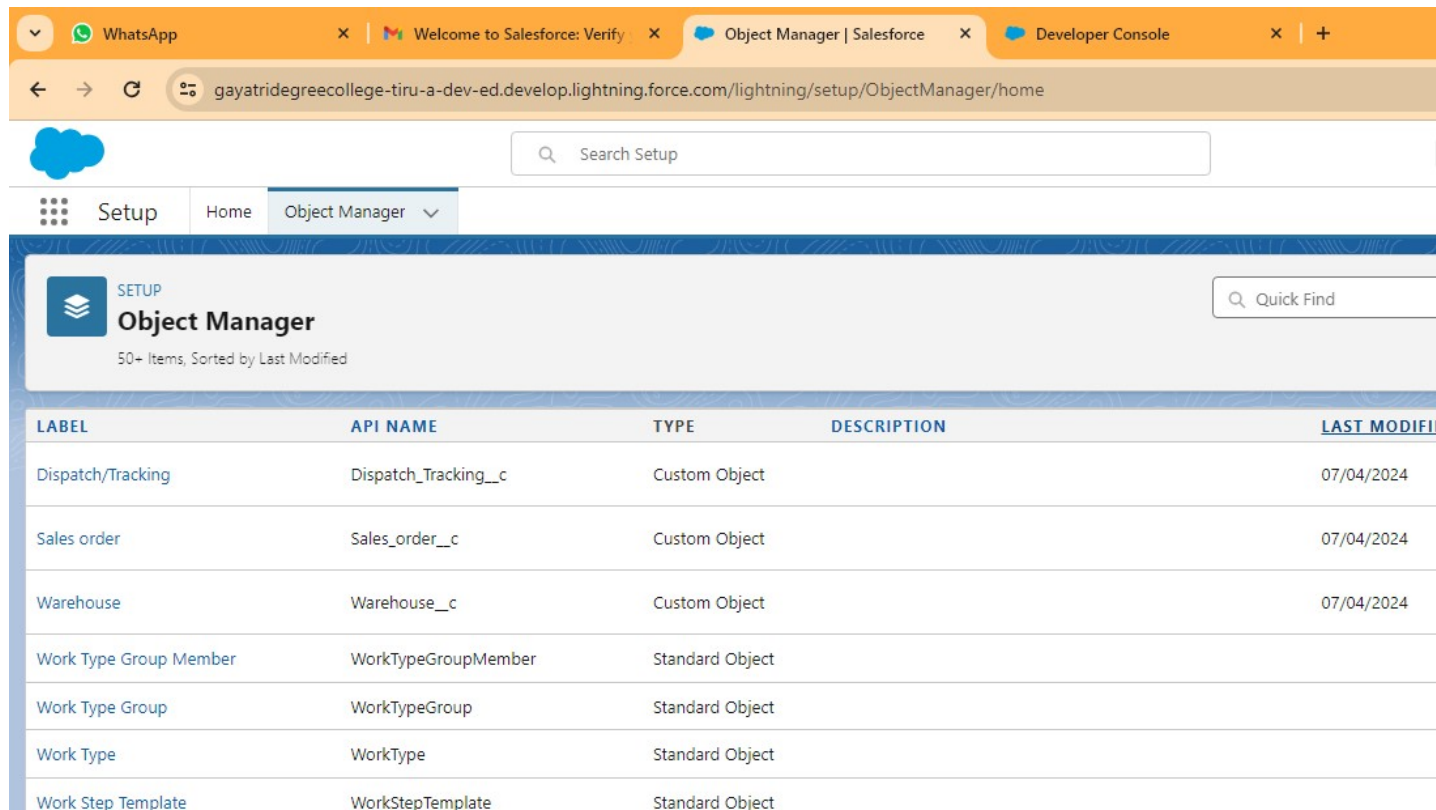
1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as 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 tabs include WhatsApp, Welcome to Salesforce: Verify, Object Manager | Salesforce, and Developer Console. The URL is gayatridegreecollege-tiru-a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home. The page has a search bar labeled 'Search Setup' and a navigation menu with 'Setup', 'Home', and 'Object Manager'. The main content area shows the 'Object Manager' header with a 'Quick Find' search bar and a list of 50+ items sorted by last modified. The table below lists the objects.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Dispatch/Tracking	Dispatch_Tracking__c	Custom Object		07/04/2024
Sales order	Sales_order__c	Custom Object		07/04/2024
Warehouse	Warehouse__c	Custom Object		07/04/2024
Work Type Group Member	WorkTypeGroupMember	Standard Object		
Work Type Group	WorkTypeGroup	Standard Object		
Work Type	WorkType	Standard Object		
Work Step Template	WorkStepTemplate	Standard Object		

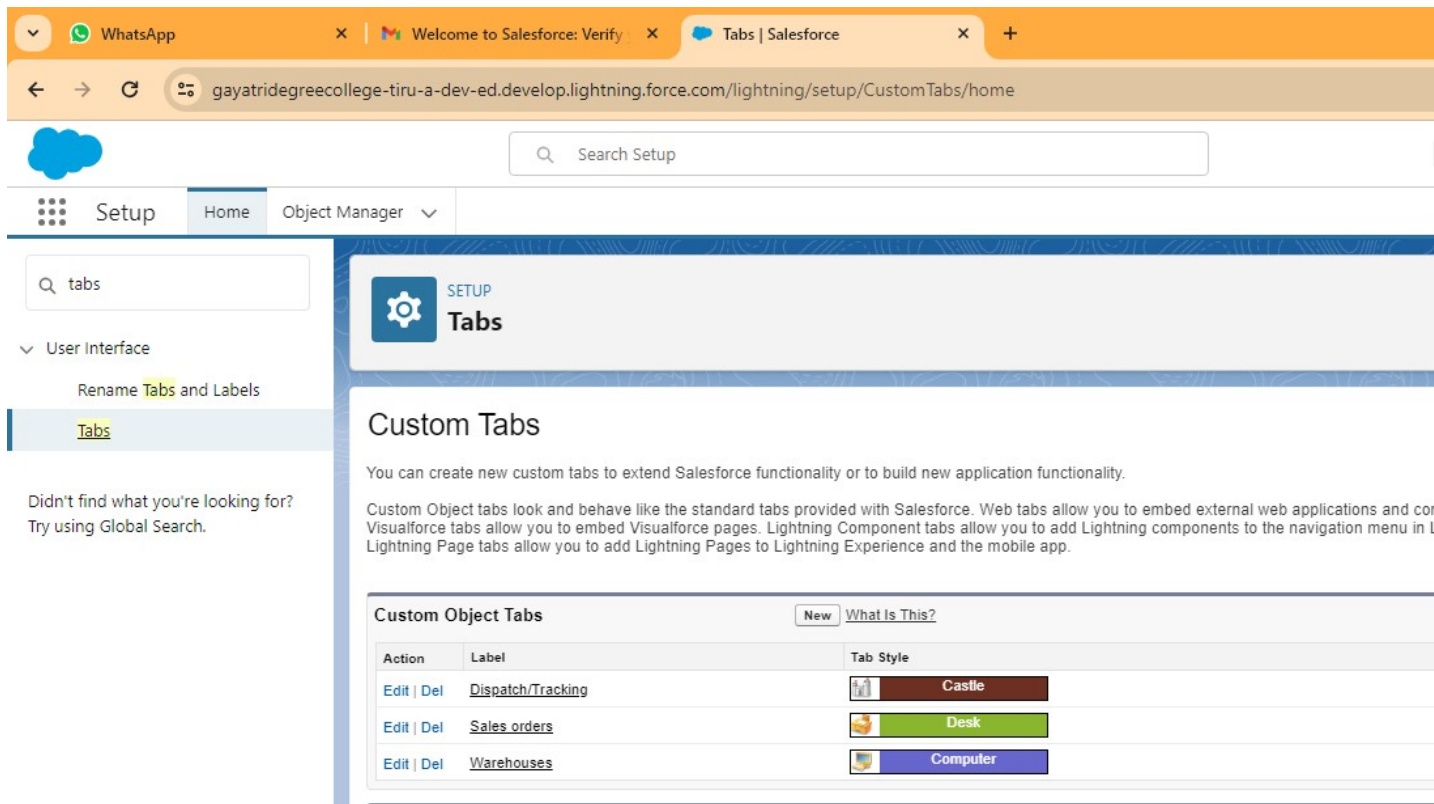
### Milestone-03 : What Is A Tab?

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 left sidebar has a search bar with 'tabs' entered, and the 'User Interface' section is expanded, showing 'Rename Tabs and Labels' 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 cor Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in L Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.'

Below the description is a table titled 'Custom Object Tabs' with columns for Action, Label, and Tab Style. The table lists three tabs: 'Dispatch/Tracking' (Castle style), 'Sales orders' (Desk style), and 'Warehouses' (Computer style).

Action	Label	Tab Style
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Dispatch/Tracking</a>	 Castle
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Sales orders</a>	 Desk
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Warehouses</a>	 Computer

## Milestone-04 : What Is An App

### ✚ Create The Sales App

1. From Setup, enter App Manager in the Quick Find and select App Manager.



## ✚ 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 browser tabs include WhatsApp, Welcome to Salesforce, Dispatch/Tracking | S, Recently Viewed | Di, Email to customer - \, and Developer Console. The address bar shows the URL: gayatridegreecollege-tiru-a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IIR0000017BF9/FieldsAndRelationships/view. The Setup navigation bar includes Setup, Home, and Object Manager. The main content area is titled 'Dispatch/Tracking' under 'SETUP > OBJECT MANAGER'. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main table, 'Fields & Relationships', lists 7 items sorted by Field Label. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, and CONTROLLING FIE. The visible rows are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIE
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)	



## **†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:  
values:
6. Open
7. Hold
8. Shipped
9. Returned
10. Click Next, Next, then Save & New.

WhatsApp x | Welcome to Salesforce x | Sales order | Salesforce x | Recently Viewed | Salesforce x | Email to customer - Salesforce x | Developer Console

gayatridegreecollege-tiru-a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011IR00000178Eu/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Sales order**

Details

**Fields & Relationships**  
10 Items, Sorted by Field Label

Quick Find New Deleted Field

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
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)	

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

## ✚ 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 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, and List View Button Layout. The main content area is titled 'Sales order' and shows the 'Fields & Relationships' section with 10 items, sorted by Field Label. A table lists the fields with their labels, names, data types, and controlling fields.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
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)	

## ✚ 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.

The screenshot shows the Salesforce Setup interface. The breadcrumb trail is 'SETUP > OBJECT MANAGER'. The main heading is 'Contact'. The left sidebar shows the 'Fields & Relationships' section selected. The main content area displays a table of fields for the 'Contact' object, sorted by Field Label. The table has four columns: FIELD LABEL, FIELD NAME, DATA TYPE, and CONTROLLING FIELD. There are 35+ items in total.

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	

## 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.

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for? Try using Global Search.

User Mounika Peddintigari

Permission Set Assignments | Permission Set Assignments: Activation Required | Permission Set Group Assignments | Permission Set License Assignments | Personal Group | Public Group Membership | Managers in the Role Hierarchy | OAuth Apps | Third-Party Account Links | Installed Mobile Apps | Authentication Settings for External Systems | Login History | User

User Detail

Edit Sharing Reset Password Freeze

Name	Mounika Peddintigari	Role	Salesforce
Alias	mpedd	User License	Standard User
Email	mounikapeddintigari@gmail.com (Verify)	Profile	Standard User
Username	mounikapeddintigari247@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17130158035097783485	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	<a href="#">View</a>
Delegated Approver		Data.com User Type	<a href="#">i</a>

Mananar

Accessibility Mode (Classic Only)

## 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

Browser tabs: WhatsApp, Welcome to Salesforce, Account | Salesforce, Recently Viewed | Salesforce, Email to customer - Salesforce, Developer Console

URL: [gayatridegreecollege-tiru-a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/ValidationRules/view](https://gayatridegreecollege-tiru-a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/ValidationRules/view)

Search Setup

Setup | Home | Object Manager

SETUP > OBJECT MANAGER

**Account**

**Validation Rules**  
1 Items, Sorted by Rule Name

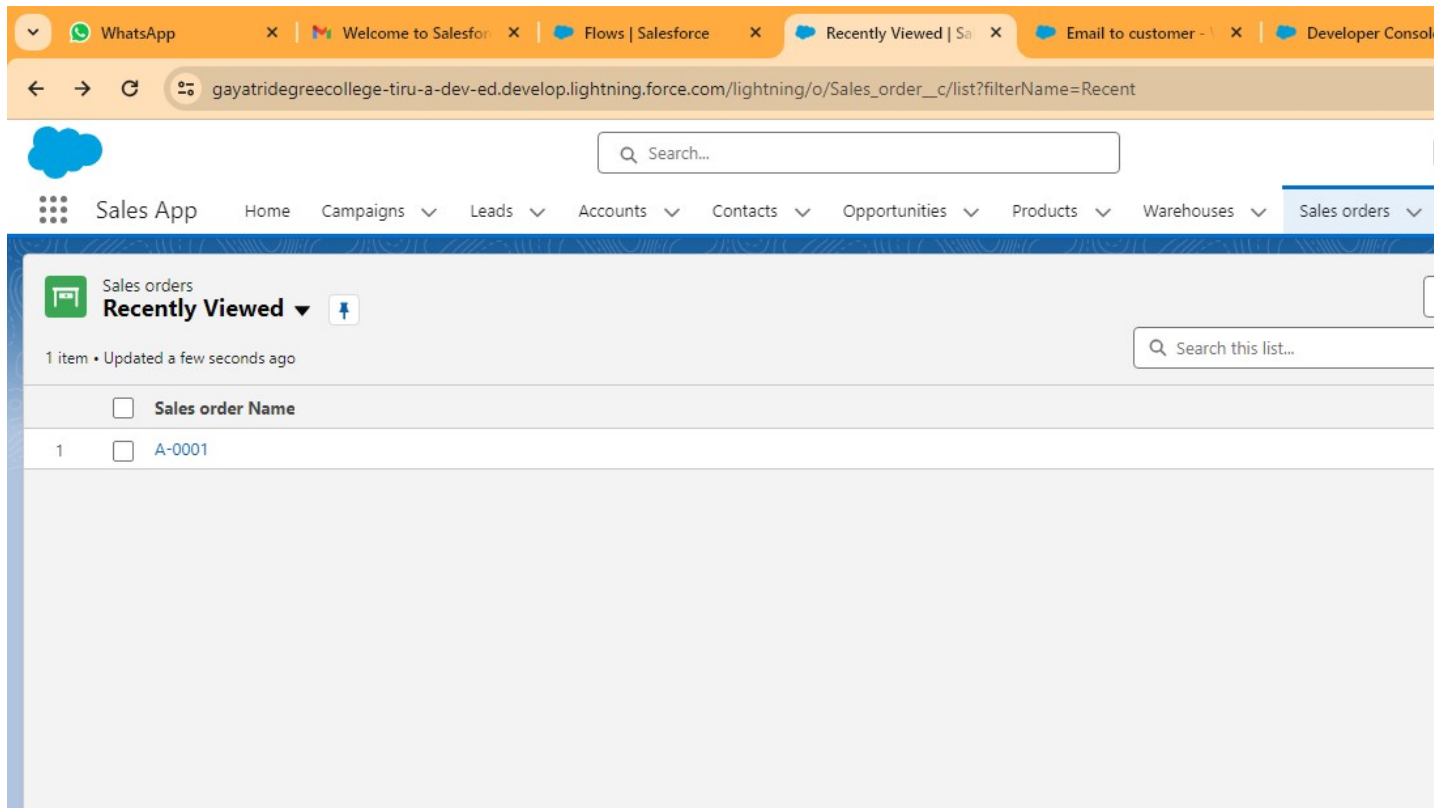
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Phone_number_has_international_format	Account.TextName	Phone number must begin with + (country code).	✓	mounika p

Left sidebar menu: Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Hierarchy Columns, Scoping Rules, Triggers

## 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



Sales order  
**A-0001**

Related **Details**

Sales order Name	A-0001	Owner	mounika peddintigari
Status	Open		
Customer	United Oil & Gas Corp.		
Contact	oil supply		
Order date	13/04/2024		
Email id			

Order confirmed

#### •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. The browser tabs at the top include WhatsApp, Welcome to Salesforce, Flows | Salesforce, New Sales orders with Customer Report, Email to customer, and Developer Console. The address bar shows the URL: `gayatridegreecollege-tiru-a-dev-ed.develop.lightning.force.com/lightning/r/Report/00OIR000007Qz4Q2AS/view?queryScope=userFolders`. The Salesforce navigation bar includes the Sales App icon and links to Home, Campaigns, Leads, Accounts, Contacts, Opportunities, Products, and Warehouses. The report header shows 'Report: Sales orders with Customer' and 'New Sales orders with Customer Report'. There is an 'Enable Field Editing' button and a search icon. Below the header, it indicates 'Total Records: 1'. A table displays the report data:

Customer: Account Name ↑	Sales order: Sales order Name ↓
United Oil & Gas Corp. (1)	A-0001
<b>Subtotal</b>	
<b>Total (1)</b>	

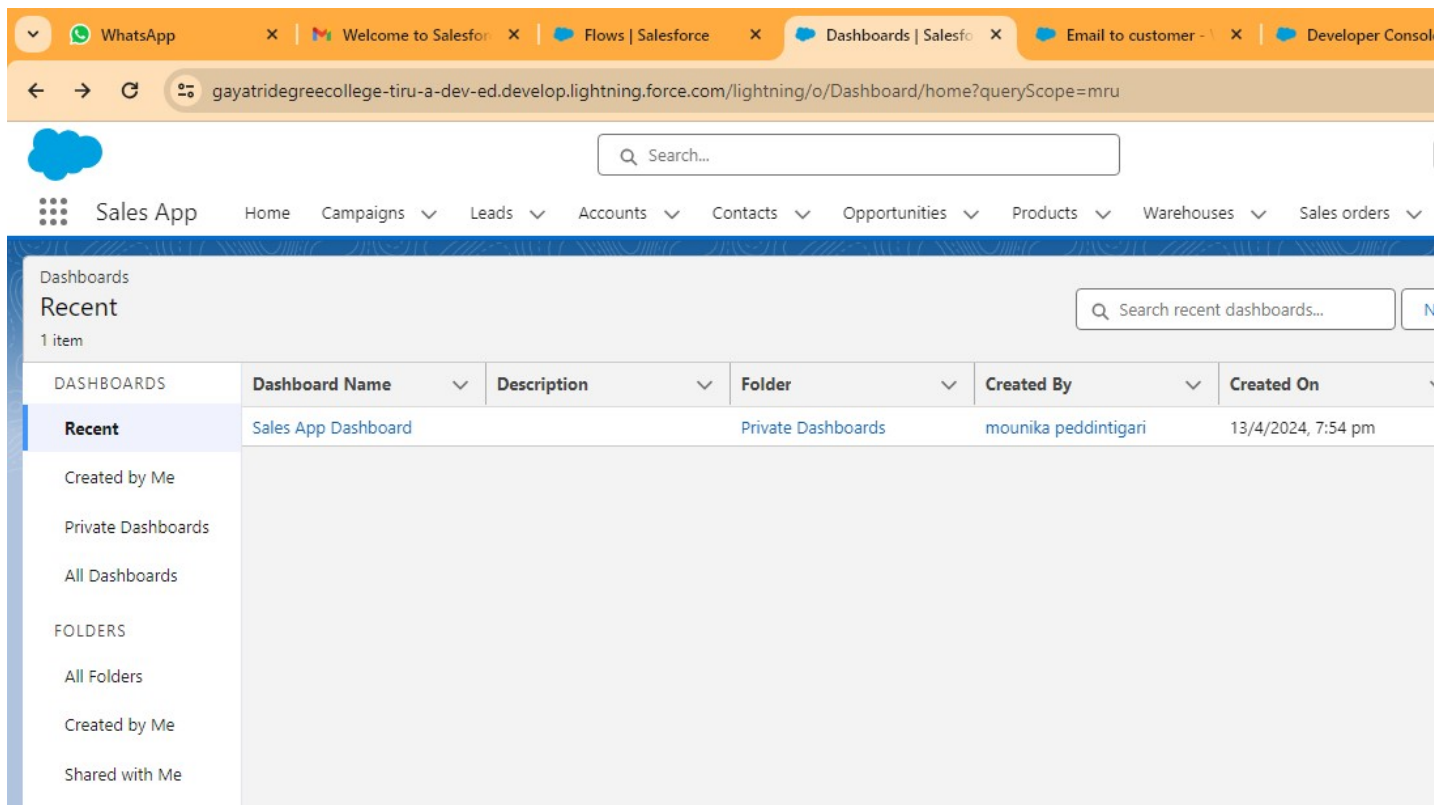
#### •View Report

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



The screenshot shows the Salesforce user interface. At the top, there's a navigation bar with tabs for 'WhatsApp', 'Welcome to Salesforce', 'Flows | Salesforce', 'Dashboards | Salesforce', 'Email to customer', and 'Developer Console'. Below this is a search bar and a navigation menu with options like 'Home', 'Campaigns', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Products', 'Warehouses', and 'Sales orders'. The main content area is titled 'Dashboards' and 'Recent', showing a table with one item.

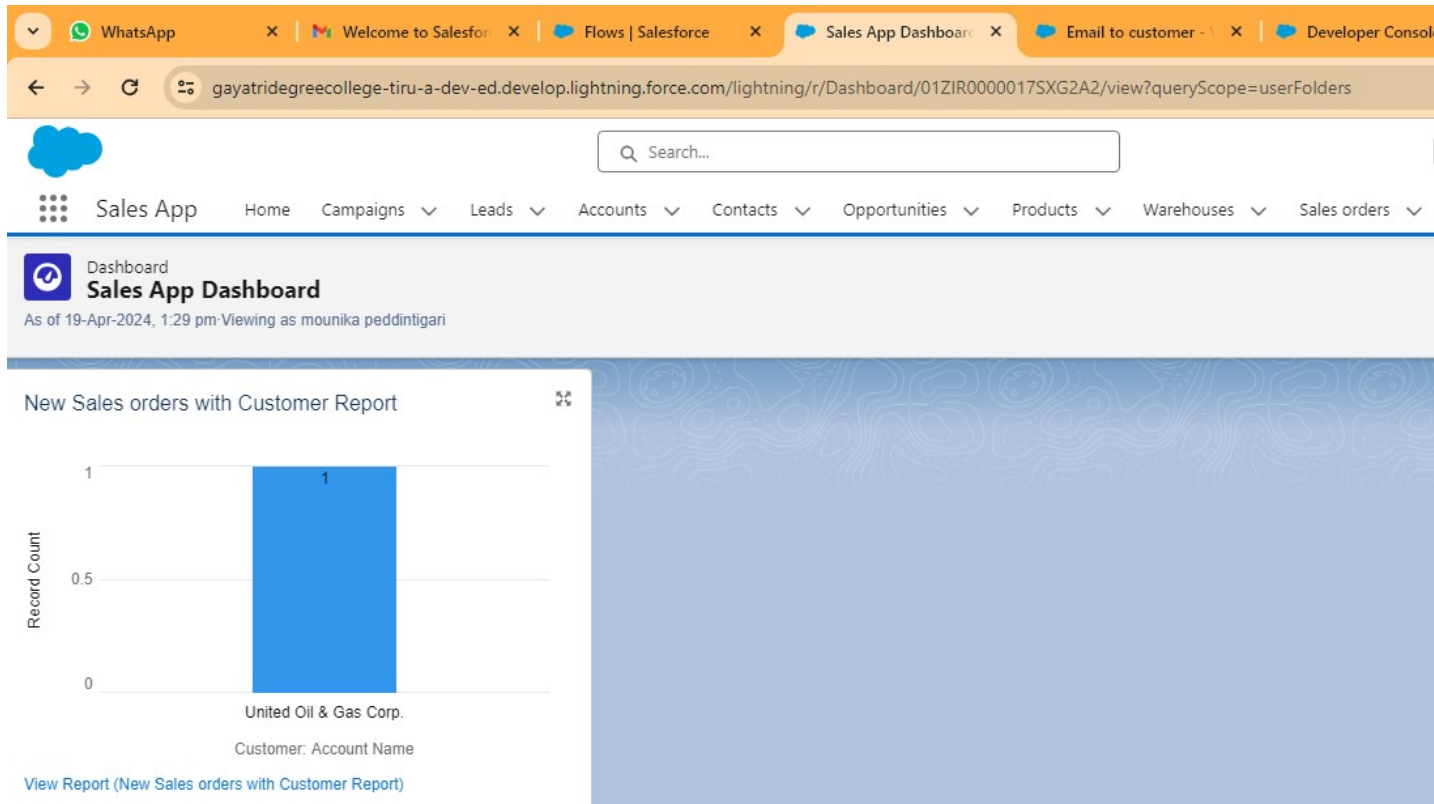
DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On
Recent	Sales App Dashboard		Private Dashboards	mounika peddintigari	13/4/2024, 7:54 pm

### ✚ 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



## 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`

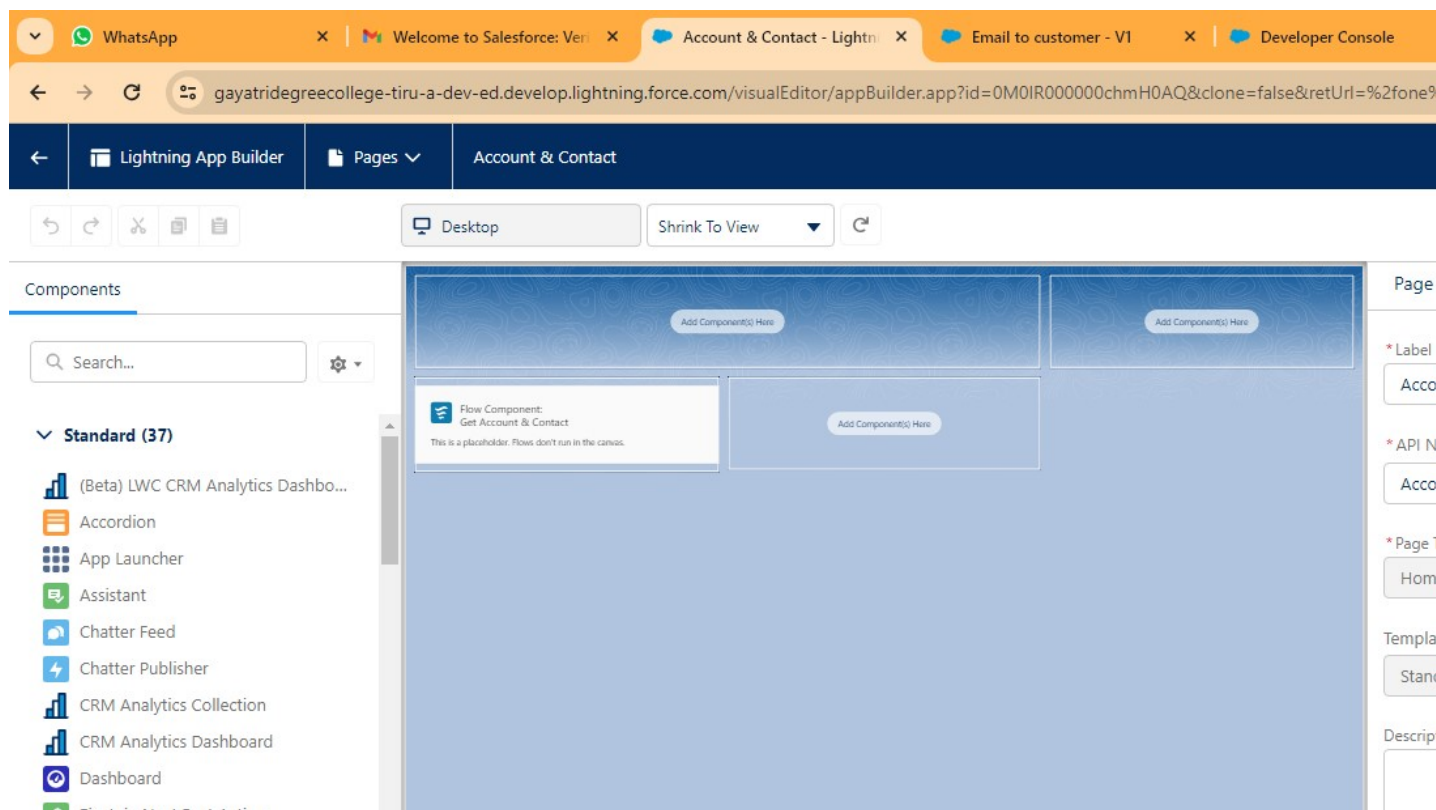
- iii. Postal code- `{!Get_Account_Record.ShippingPostalCode}`
- iv.State/province value- `{!Get_Account_Record.ShippingState}`
- v. Street Value- `{!Get_Account_Record.ShippingStreet}`
- vi. Click on done and save it. Give the label name as Get Account & Contact

The screenshot displays the Salesforce Flow Builder interface. The top navigation bar shows the 'Flow Builder' tab and the flow name 'Get Account & Contact - V1'. The left sidebar contains a 'Toolbox' with a 'Manager' tab and a search bar. Below the search bar, there are sections for 'RESOURCES' including 'Record (Single) Variables (1)' with 'Account from Get\_Account\_Record', 'Screen Components (4)' with 'Address', 'Email', 'Name', and 'Phone', and 'Variables (1)'. The main canvas shows a flow diagram with four steps: 'Screen Flow Start', 'Get Account Record Get Records', 'Get Account & Contact Screen', and 'End'.

### ✚ 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

The screenshot shows the Salesforce Setup interface for the 'Sales order' object. 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, and List View Button Layout. The main content area is titled 'Edit Sales order Custom Field Email id'. Below this is the 'Custom Field Definition Edit' section with buttons for 'Change Field Type', 'Save', and 'Cancel'. The 'Field Information' section includes fields for 'Field Label' (Email id), 'Field Name' (Email\_id), 'Description', and 'Help Text'. Below these are dropdowns for 'Data Owner' (User), 'Field Usage' (--None--), and 'Data Sensitivity Level' (--None--). At the bottom, there is a 'Compliance Categorization' section with 'Available' and 'Chosen' lists. The 'Available' list contains PII, HIPAA, GDPR, and PCI. The 'Chosen' list is currently empty.

g. Now Create a new field Order confirmed

h. On the same object sales order create a Picklist field.

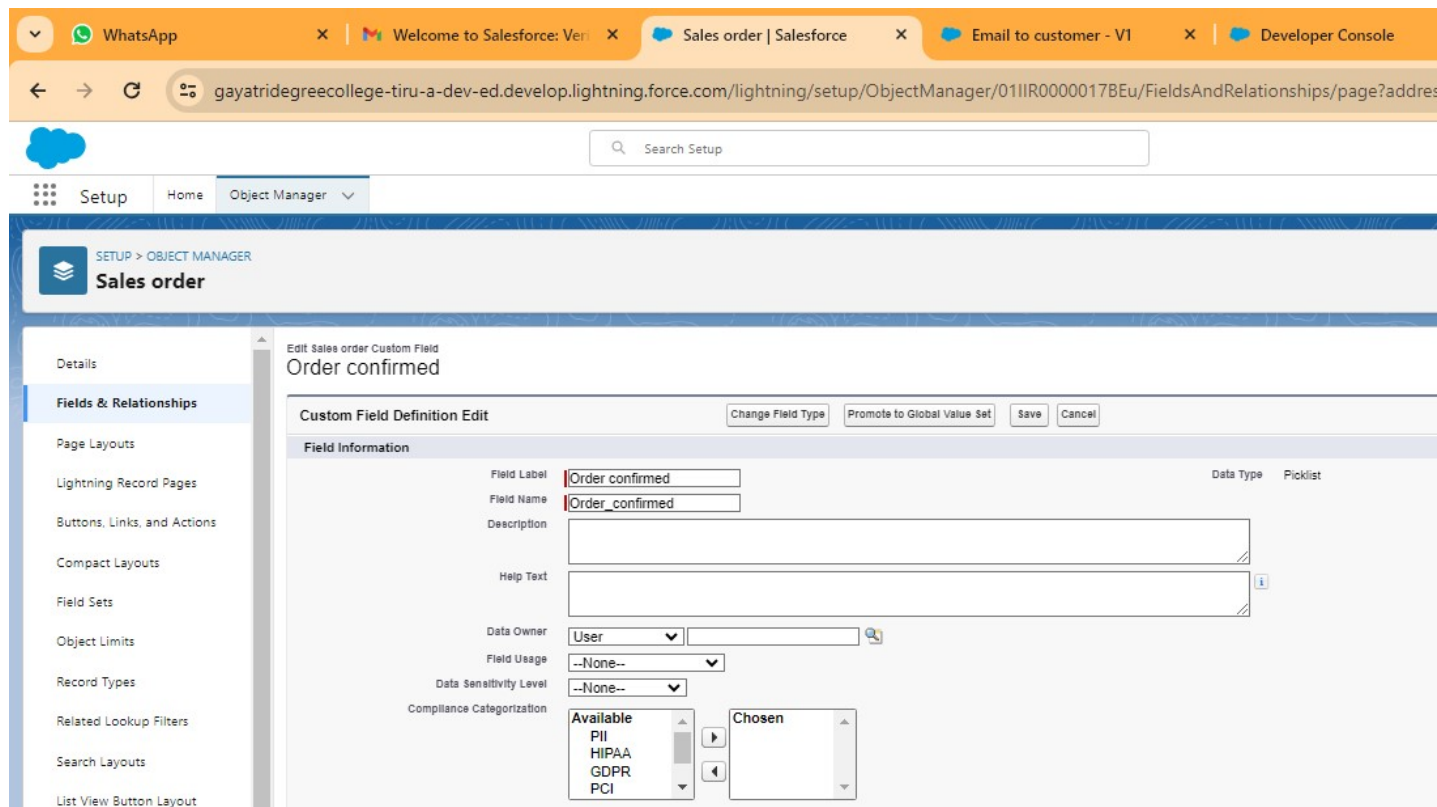
i. Give the label name as Order confirmed.

j. And in Values give 1) Yes

2) No

k. Make it as Required field.

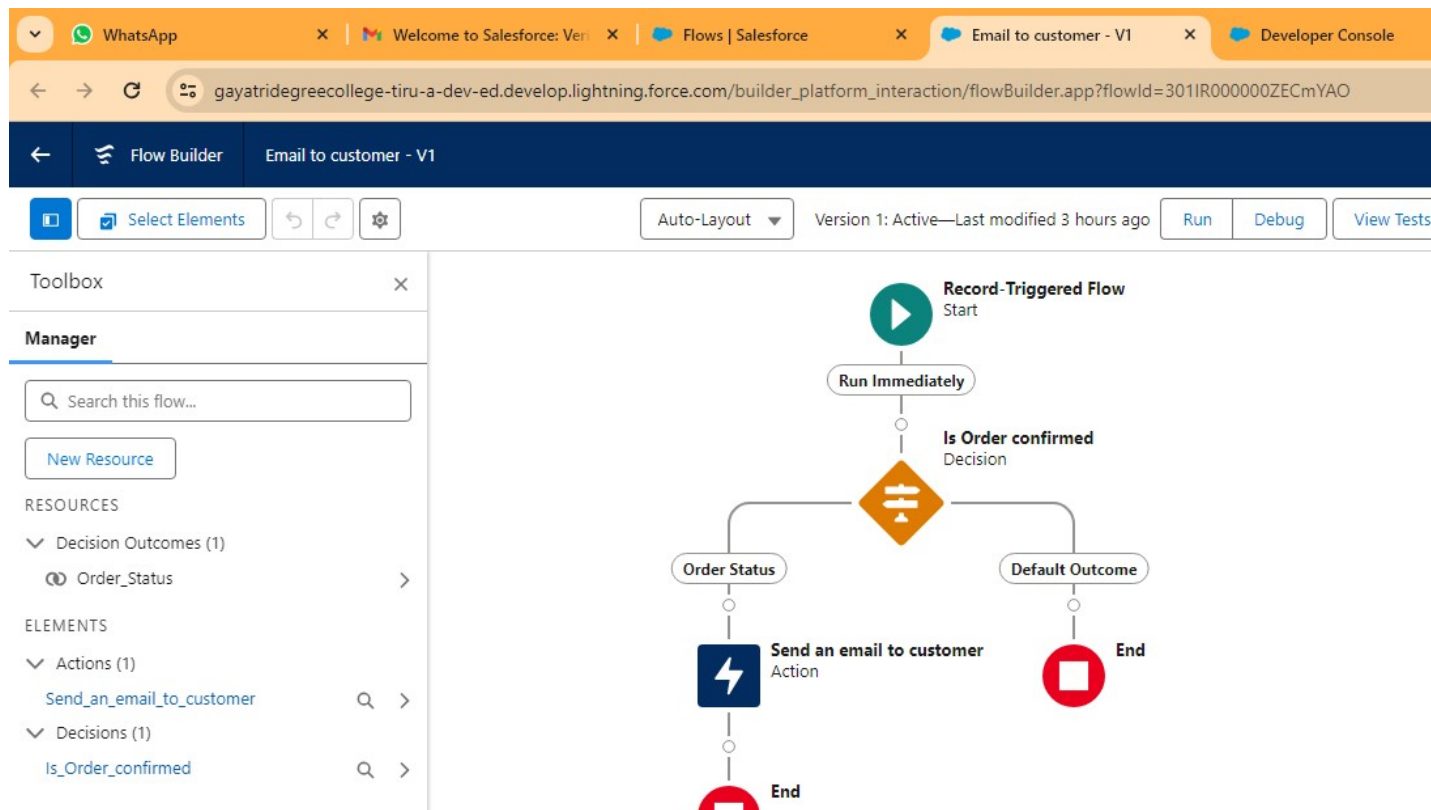




## ✚ To Create Record Trigger Flow

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

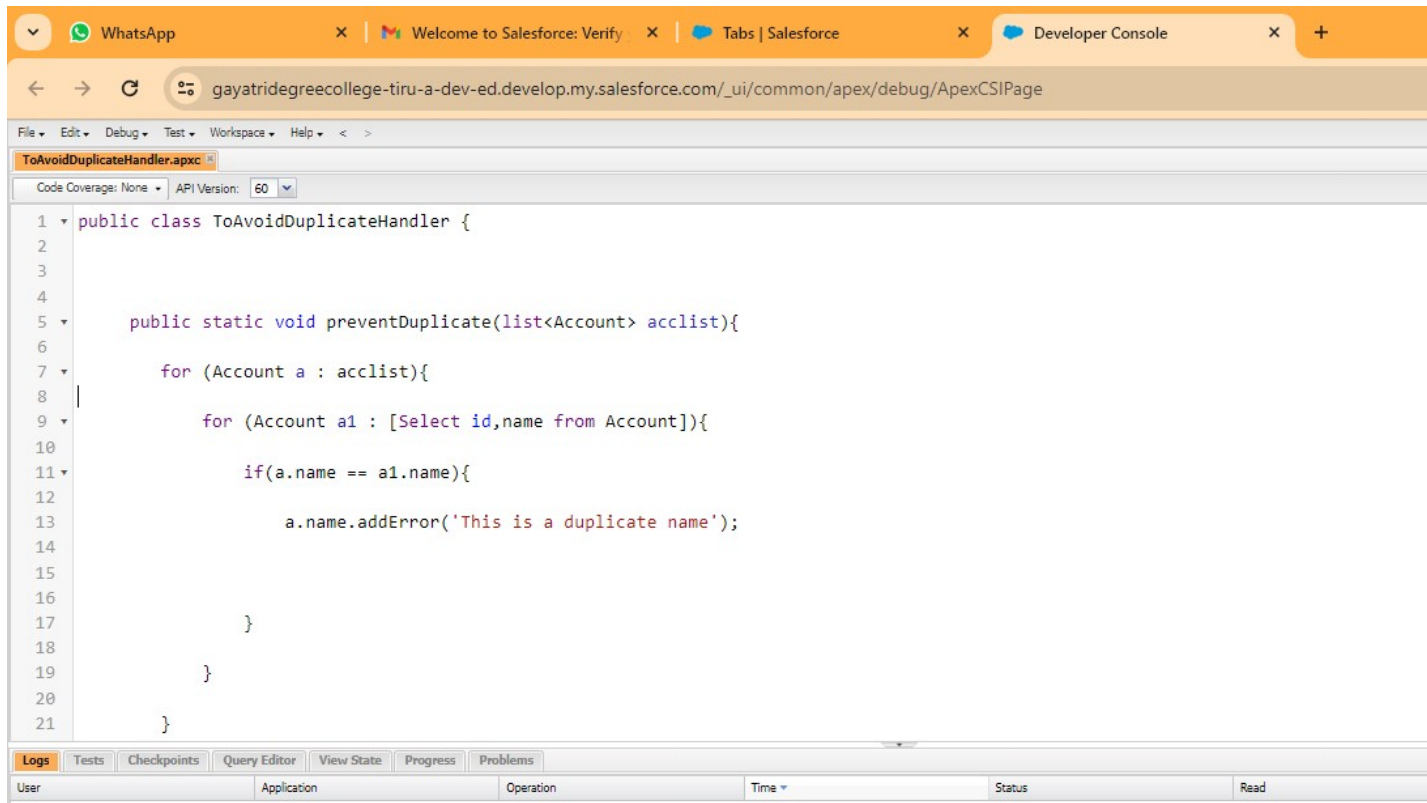
### ✚ Trigger On Account To Prevent Duplicate Name

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

CODE:

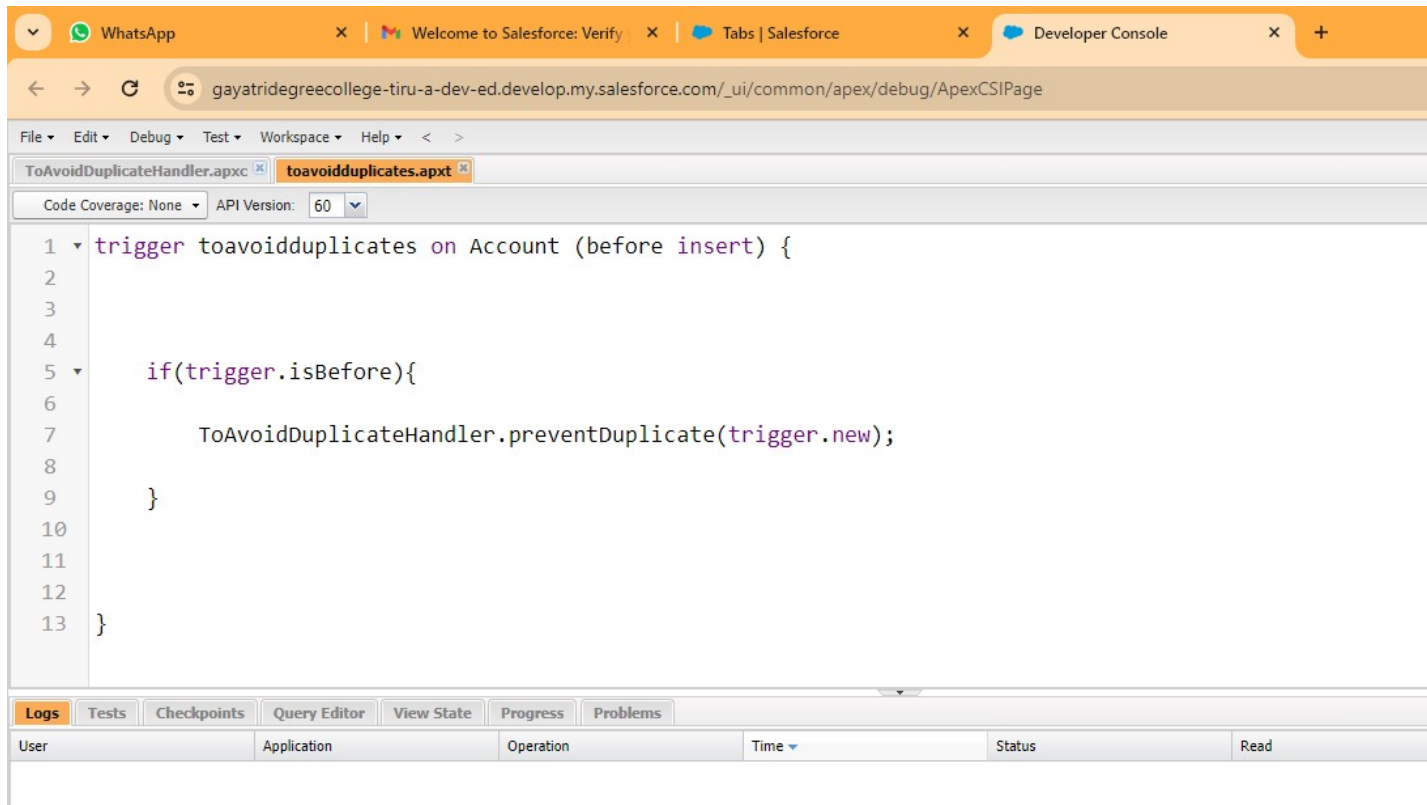
```
public static void preventDuplicate(list<Account>acclist){
    for (Account a : acclist){
        for (Account a1 : [Select id,name from Account]){
            if(a.name == a1.name){
                a.name.addError('This is a duplicate name');
            }
        }
    }
}
```

}



### ✚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.



CODE:

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

**THE END**