

NAAN MUDHALVAN

PROJECT REPORT

on

[SALESFORCE]

**Retail Management Application Using
Salesforce**

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Developer (Short 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 customers.

Project Goals:

- Improve customer satisfaction and loyalty by providing a seamless shopping experience.
- Increase sales revenue and conversion rates.
- Ensure that employees are proficient in using the system, leading to high user adoption rates.

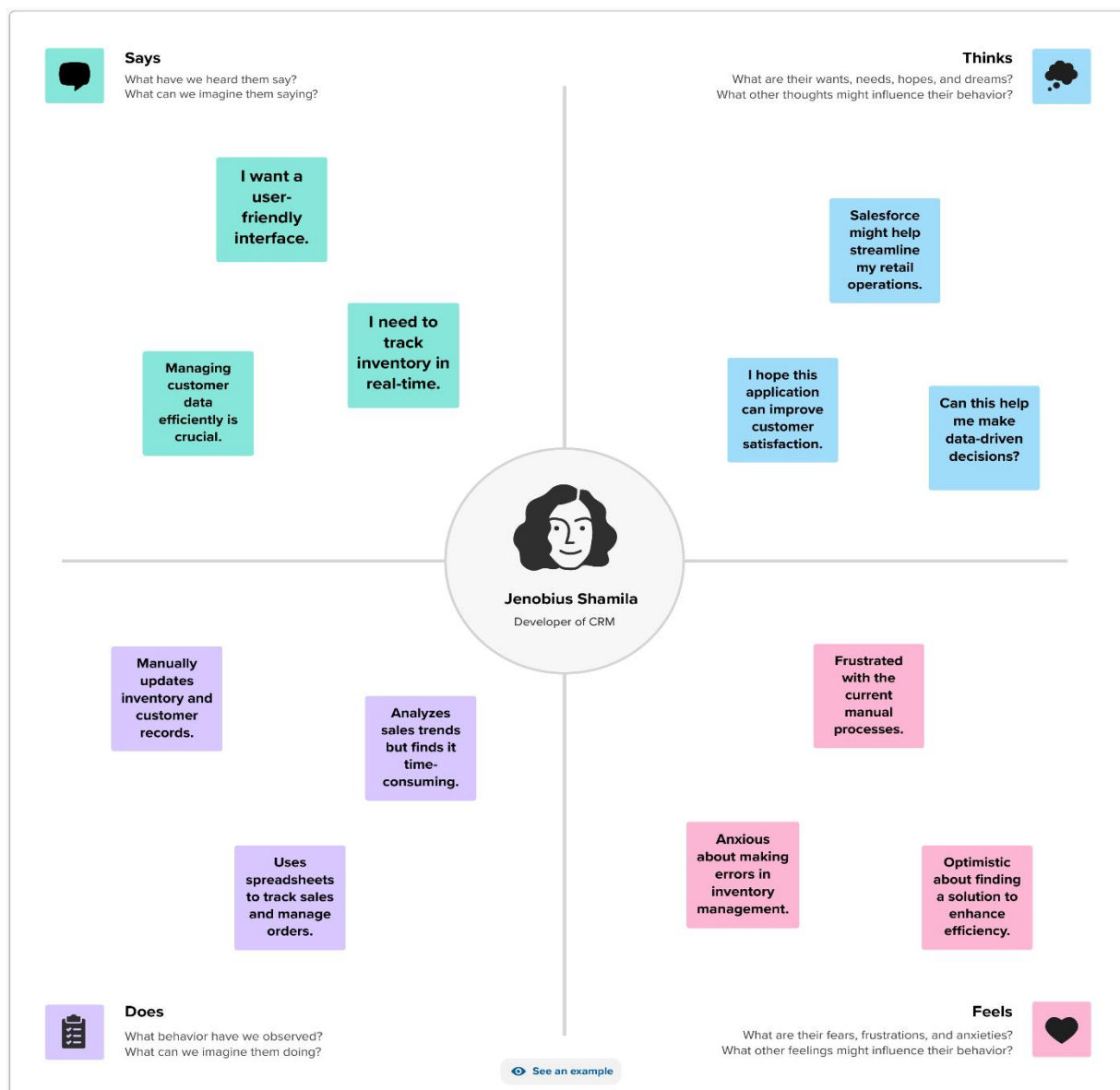
Scope:

- Develop customer management, inventory tracking, and sales processing modules within the Salesforce platform.
- Enable integration with online stores and various sales channels for unified inventory and sales management.
- Implement real-time sales reports, customer behavior analytics, and inventory turnover analysis tools for data-driven decision-making.

Problem Definition & Design Thinking:

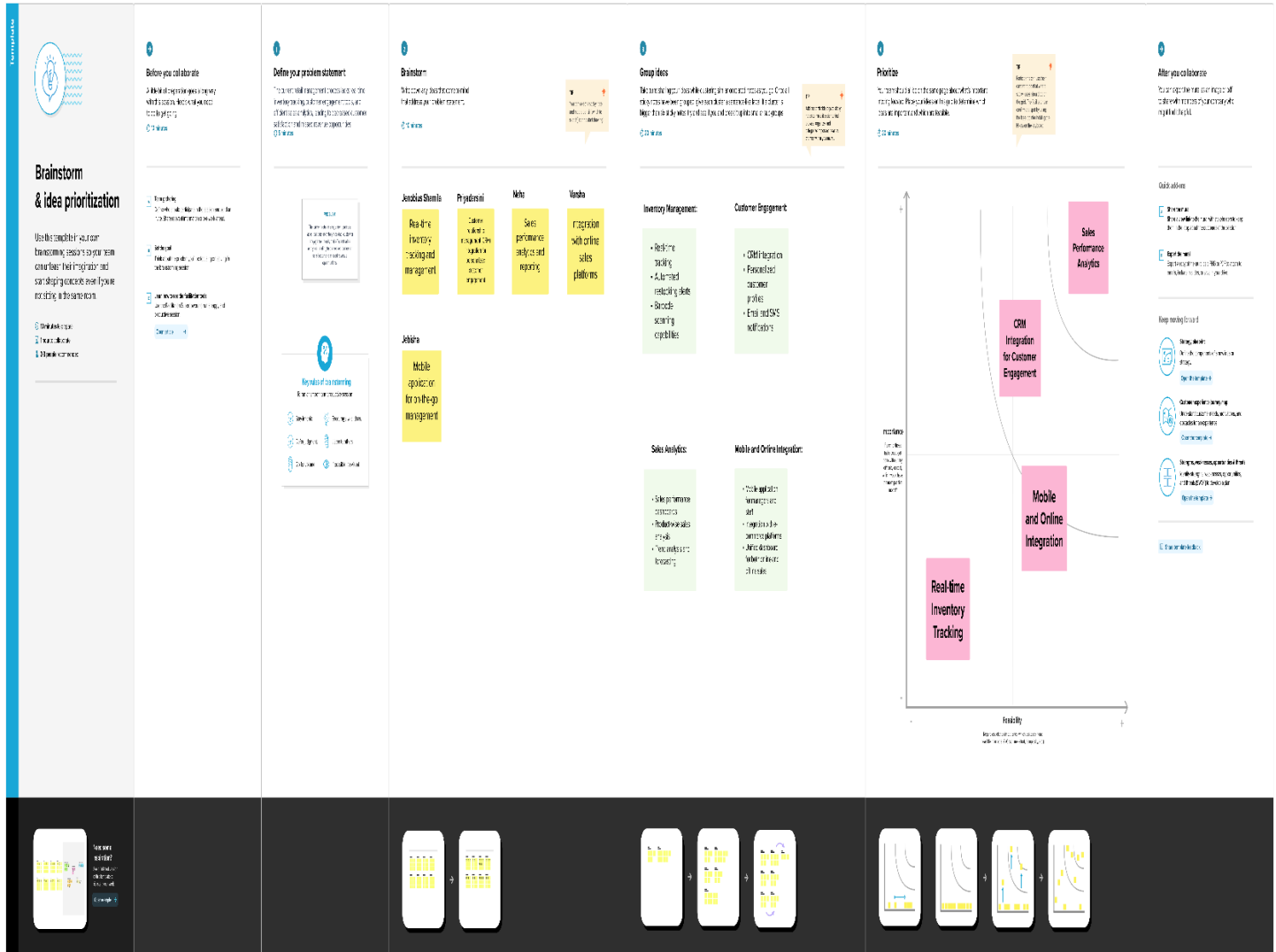
Empathy Map:

An empathy map is a tool used to gain a deeper understanding of users or customers by exploring their thoughts, feelings, actions, and experiences related to a particular situation or context.



Ideation & Brainstorming:

Generating creative solutions to address the identified challenges, using brainstorming and collaboration.



Milestone- 01 [Creation of developer account]

- 1.Go to developer.salesforce.com/signup
- 2.Click on sign up.
- 3.On the sign up form, enter the following details:
 - a) First name: **Jenobius Shamila**
 - b) Last name: **J**
 - c) Email: **jenobiusjsj@gmail.com**
 - d) Role: **Developer**
 - e) Company: **Ponjesly College of Engineering**
 - f) County: **India**
 - g) Postal Code: **629180**
 - h) Username: **jenobiusjsj@salesforce.com**

Developer Edition Signup | Salesforce

developer.salesforce.com/signup

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- Build apps fast with drag-and-drop tools
- Customize your data model with clicks
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- Integrate with anything using powerful APIs
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Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
Your first name

Last Name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

Country/Region*
Country/Region

Postal Code*
Your postal code

Username*
jane@company.sandbox

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.

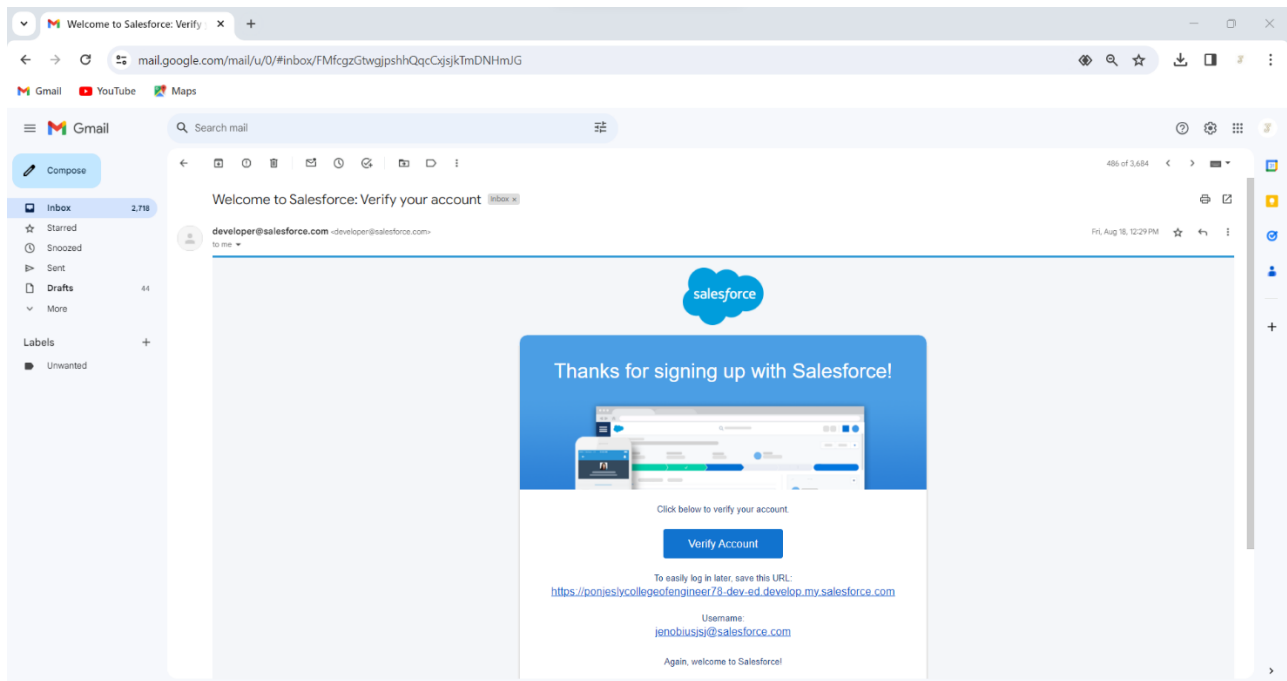
☐ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement.

Sign me up

Account Activation

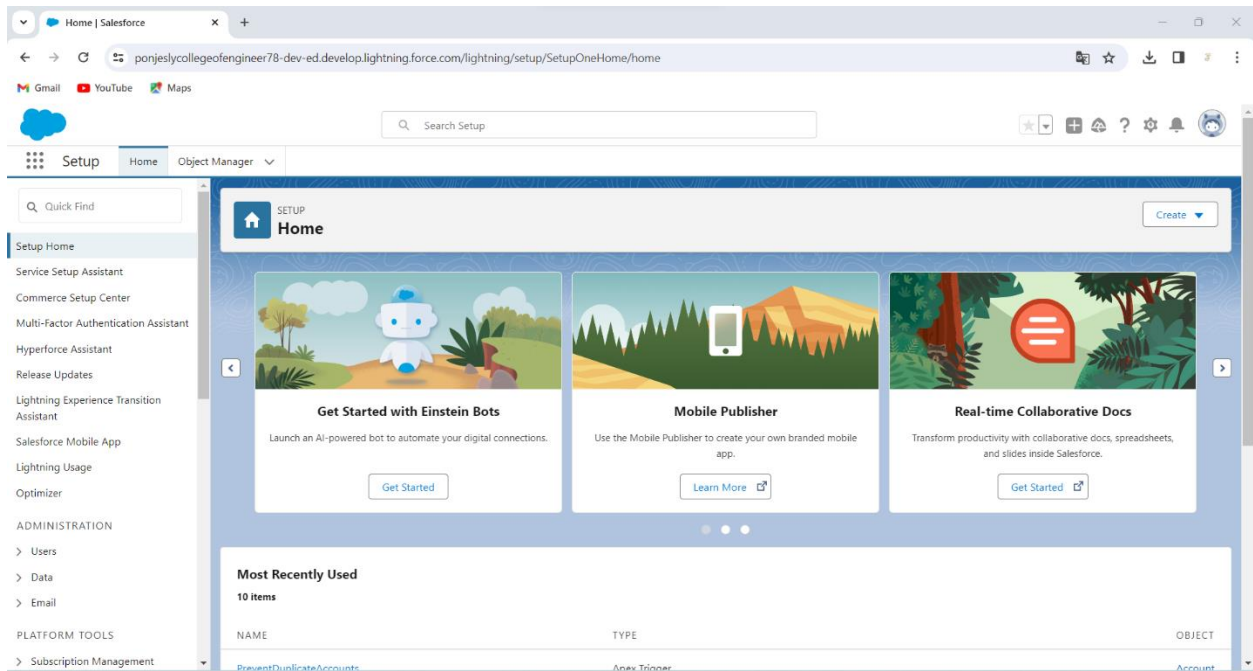
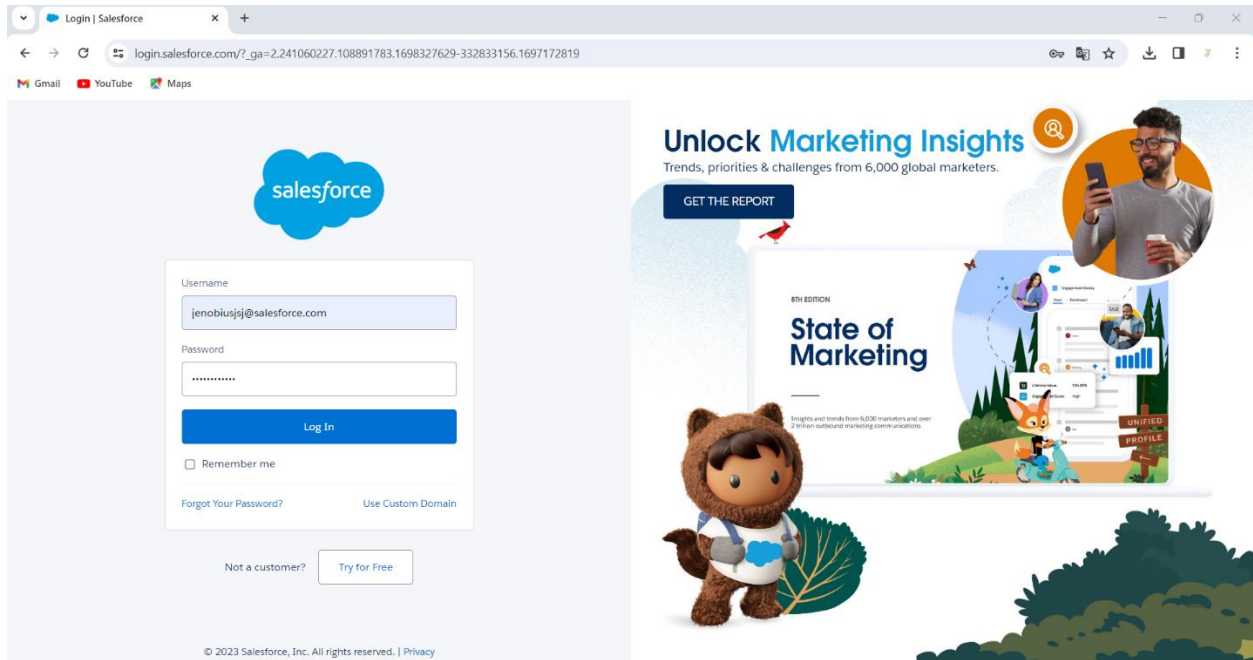
Go to the inbox of the email that you used while signing up.

Click on the verify account to activate your account.



Login to Your Salesforce Account

1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



Milestone- 02 [Object Creation]

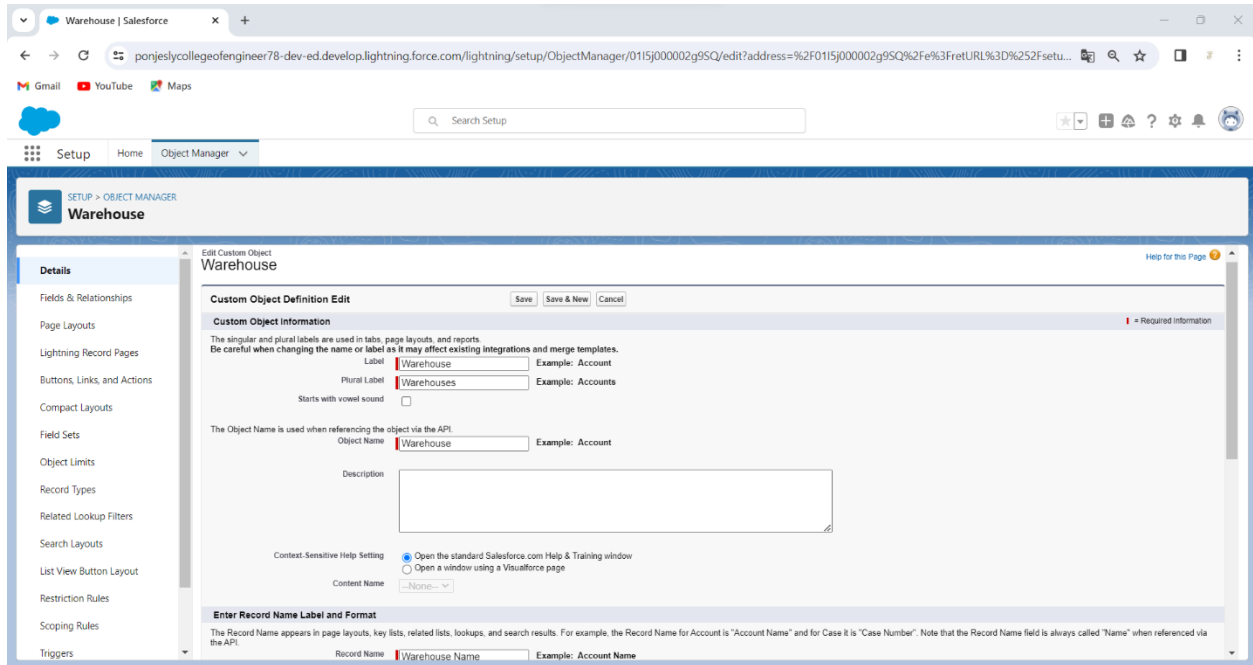
Creation of Warehouse Object:

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: **Warehouse**
6. Plural Label: **Warehouses**
7. Record Name: Warehouse Name
8. **Check the Allow Reports**
9. **Check the Allow Search**
10. Click Save.

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

Note – While making **Sales order** Object select data type “**Auto Number**” & Record Name- “Sales order Number” in “Enter Record Name Label and Format” Section.

Object Name - Warehouse



The screenshot shows the Salesforce Setup interface for the 'Warehouse' custom object. The left sidebar contains a 'Details' menu with options like 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, and Triggers. The main content area is titled 'Edit Custom Object Warehouse' and includes a 'Custom Object Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. Below this is the 'Custom Object Information' section, which contains fields for 'Label' (Warehouse), 'Plural Label' (Warehouses), and 'Object Name' (Warehouse). It also includes a 'Description' field and a 'Context Sensitive Help Setting' dropdown. At the bottom, the 'Enter Record Name Label and Format' section is visible, showing the 'Record Name' field set to 'Warehouse Name'.

Warehouse | Salesforce

ponjeslycollegeofengineer78-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002g9SQ/edit?address=%2F0115j000002g9SQ%2F%3FretURL%3D%252Fsetu...

Setup Home Object Manager

Warehouse

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

Triggers

Edit Custom Object Warehouse

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label Warehouse Example: Account

Plural Label Warehouses Example: Accounts

Starts with vowel sound ☐

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

Object Name Warehouse Example: Account

Description

Context Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

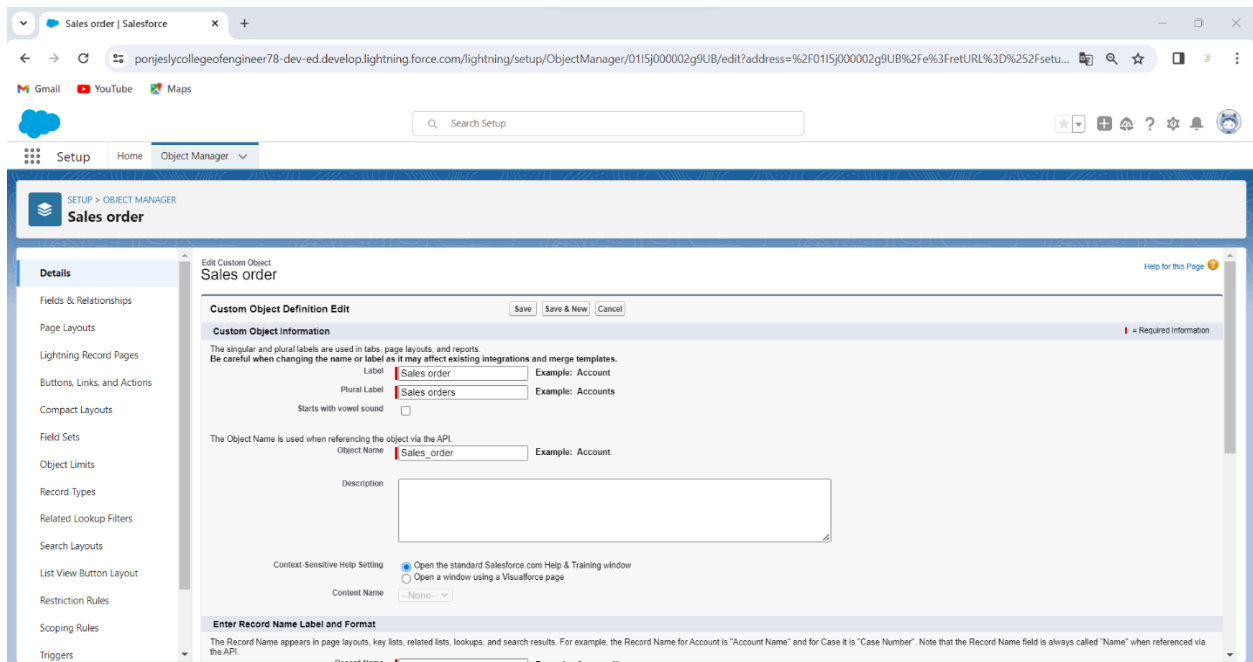
Context Name --None--

Enter Record Name Label and Format

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

Record Name Warehouse Name Example: Account Name

Object Name – Sales Order



The screenshot shows the Salesforce Setup interface for the 'Sales order' custom object. The left sidebar contains a 'Details' menu with options like 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, and Triggers. The main content area is titled 'Edit Custom Object Sales order' and includes a 'Custom Object Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. Below this is the 'Custom Object Information' section, which contains fields for 'Label' (Sales order), 'Plural Label' (Sales orders), and 'Object Name' (Sales_order). It also includes a 'Description' field and a 'Context Sensitive Help Setting' dropdown. At the bottom, the 'Enter Record Name Label and Format' section is visible, showing the 'Record Name' field set to 'Sales_order'.

Sales order | Salesforce

ponjeslycollegeofengineer78-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002g9UB/edit?address=%2F0115j000002g9UB%2F%3FretURL%3D%252Fsetu...

Setup Home 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

Triggers

Edit Custom Object Sales order

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label Sales order Example: Account

Plural Label Sales orders Example: Accounts

Starts with vowel sound ☐

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

Object Name Sales_order Example: Account

Description

Context Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Context Name --None--

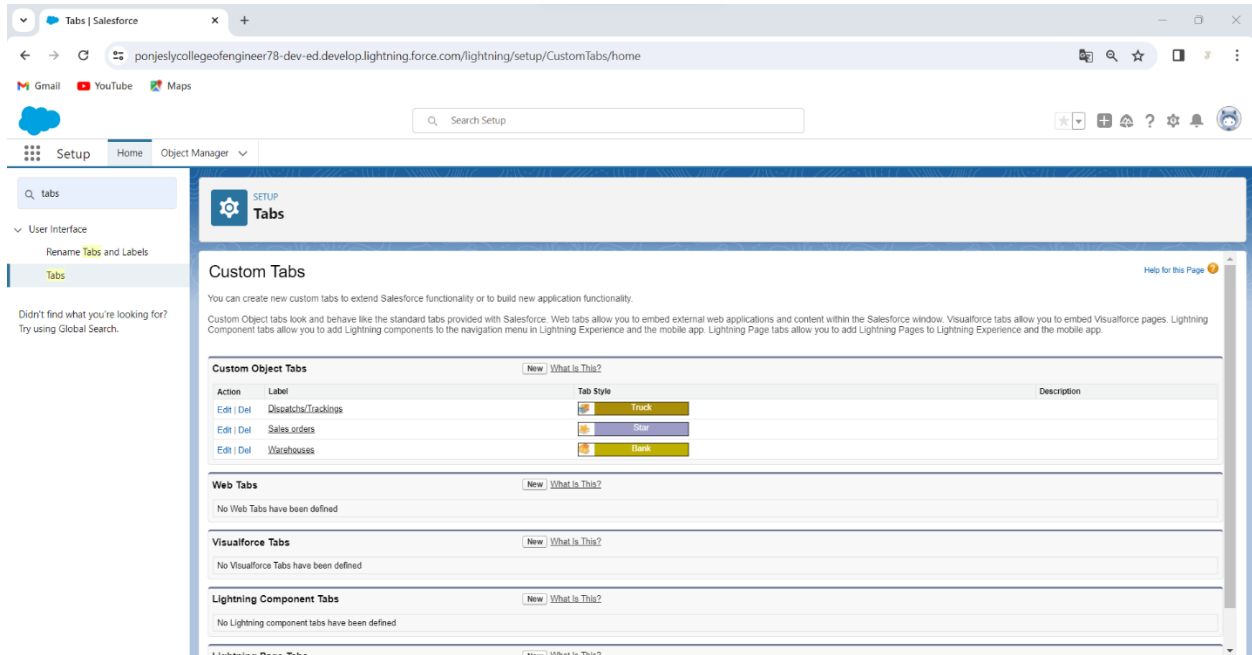
Enter Record Name Label and Format

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

Record Name Sales_order Example: Account Name

Milestone- 03 [Tabs Creation]

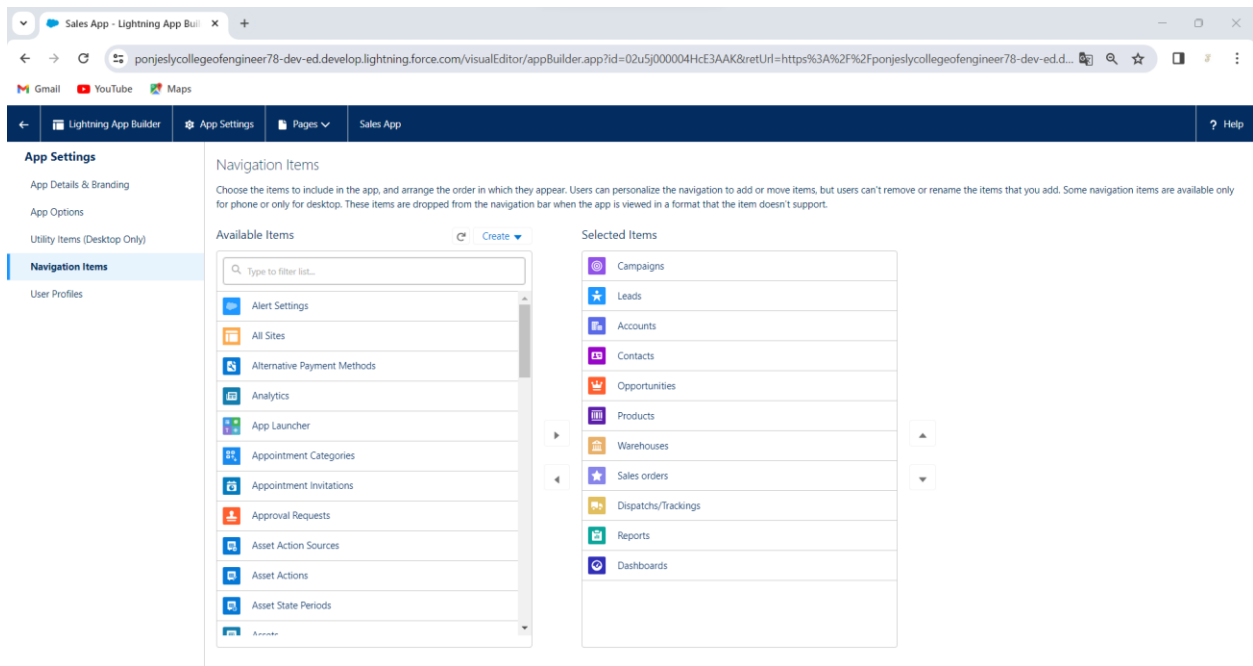
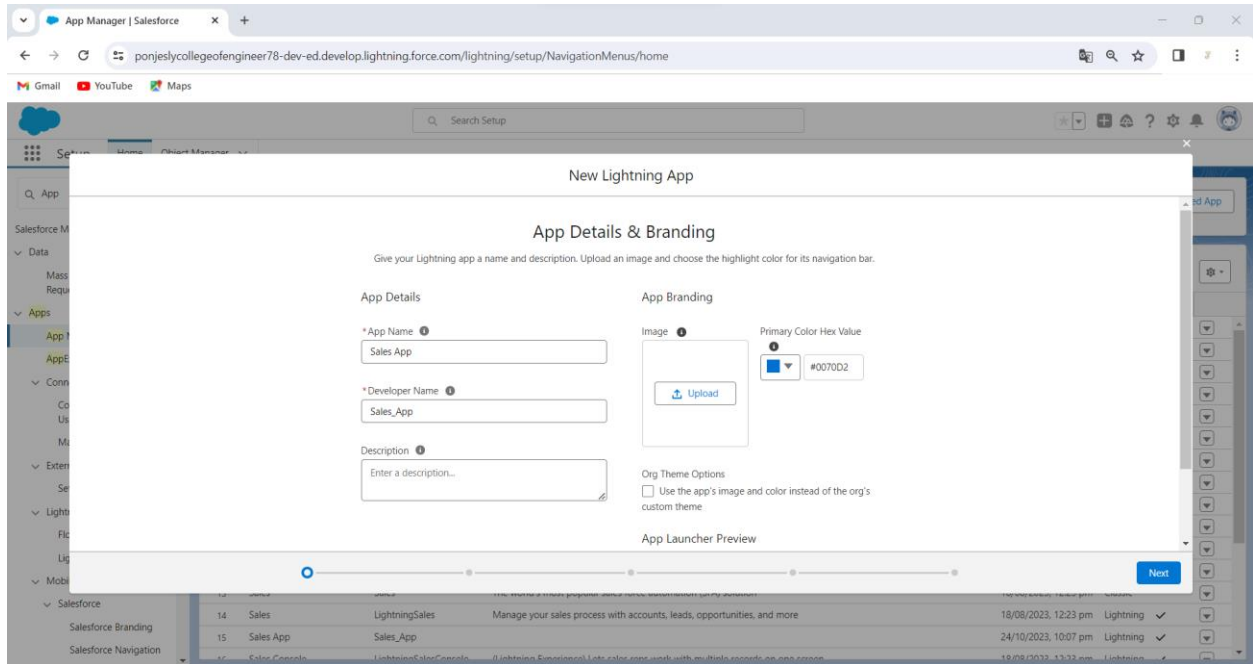
1. Enter Tabs in Quick Find and select Tabs.
2. Under Custom Object Tabs, click New.
3. For Object, select Warehouse.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save
6. In the same way create Tabs for all Custom Objects – Sales order, Dispatch /Tracking.



Milestone- 04 [Lightning 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.

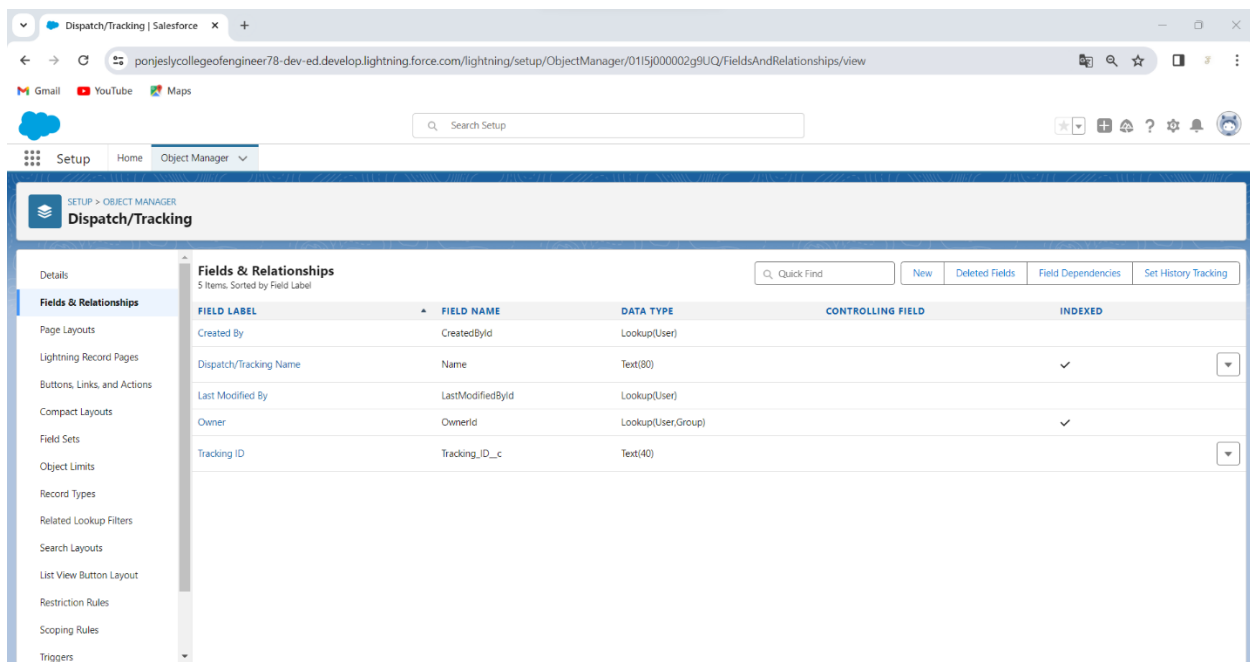
Note – Similarly create **Service App**.



Milestone- 05 [Fields & Relationships]

Creation Of Fields For The Dispatch/Tracking Object

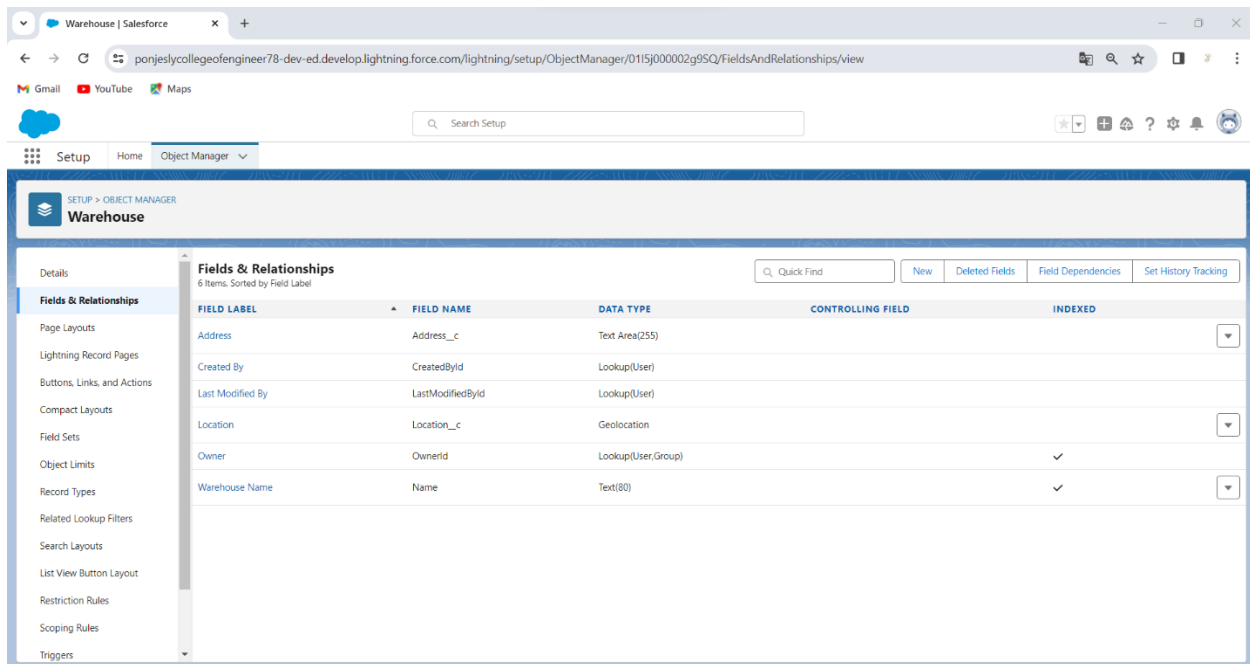
1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select **Dispatch/Tracking**
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Text as the Data Type, click Next.
7. For Field Label, enter Tracking ID & length = 40.
8. Click Next, Next, then Save & New.



The screenshot shows the Salesforce Setup interface for the Dispatch/Tracking object. The left sidebar contains a navigation menu with the following items: 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, Scoping Rules, and Triggers. The main content area is titled 'Fields & Relationships' and displays a table of fields for the Dispatch/Tracking object. The table has five columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (CreatedById, Lookup(User)), Dispatch/Tracking Name (Name, Text(80)), Last Modified By (LastModifiedById, Lookup(User)), Owner (OwnerId, Lookup(User,Group)), and Tracking ID (Tracking_ID__c, Text(40)). The Tracking ID field is highlighted with a blue background.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Dispatch/Tracking Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Tracking ID	Tracking_ID__c	Text(40)		

Creation of fields for **Warehouse** object- Address, Location select datatype according table.



The screenshot shows the Salesforce Setup interface for the 'Warehouse' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are Address, Created By, Last Modified By, Location, Owner, and Warehouse Name.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Geolocation		
Owner	OwnerId	Lookup(User,Group)		✓
Warehouse Name	Name	Text(80)		✓

Creation fields for **Dispatch/Delivery** object- Dispatched, Expected date of delivery select datatype according table.

Master-Detail Relationship On Dispatch/Delivery

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.

The screenshot shows the Salesforce Setup interface for the 'Dispatch/Delivery' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The 'Sales order' field is highlighted, showing a Master-Detail relationship with 'Sales order' as the related object.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Dispatch/Tracking Name	Name	Text(80)		✓
Dispatched	Dispatched__c	Checkbox		
Expected Date of Delivery	Expected_Date_of_Delivery__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Sales order	Sales_order__c	Master-Detail(Sales order)		✓

Let's 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

Lookup Relationship

Let's create a **Lookup relationship** on **Sales Order** object with **Account** object Follow steps 1 to 5 of field creation then follow below steps.

1. Select look up Relationship as the Data Type and click Next.
2. For Related to, enter **Account**.

3. Click Next.
4. For Field Label, enter **Customer**.
5. Click Next, Next, Next and Save.

Lookup Relationship On Sales Order

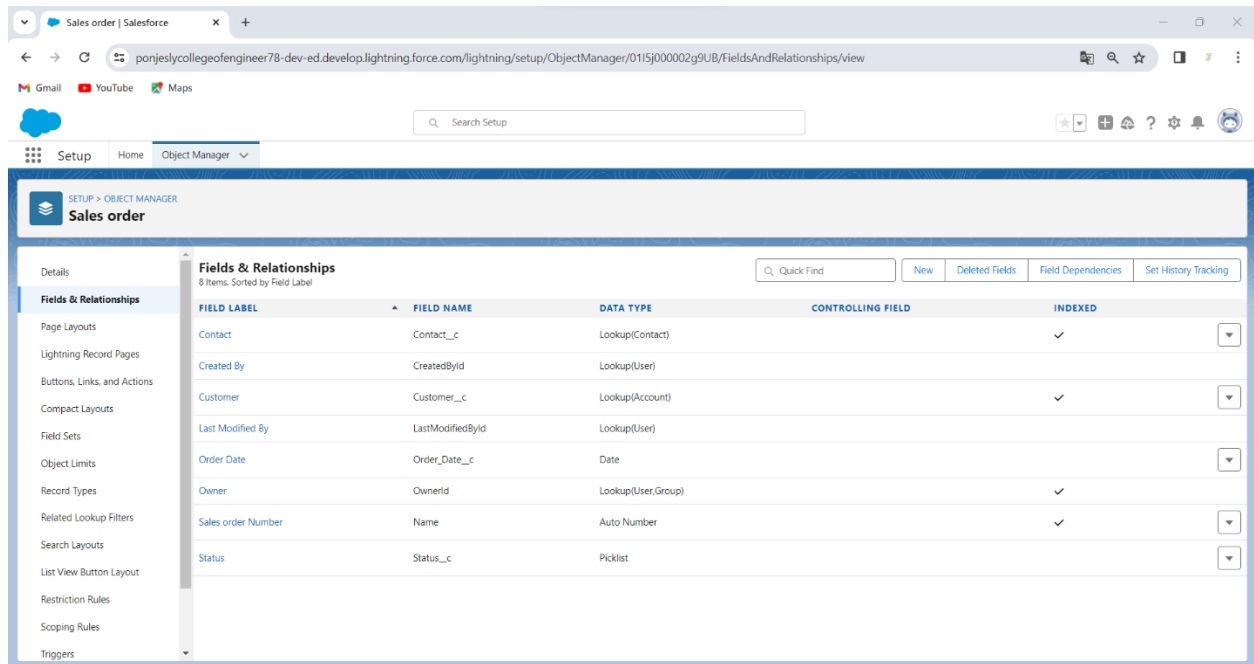
Let's create a **Lookup relationship** on **Sales Order** object with **Contact** object with use of Lookup Filter.

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

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) Contact: Account ID equals Sales Order: Customer
7. Click Next, Next, Next and Save.

Create Order Date Field

Create Order date field on Sales Order



Cross-Object Formula Field

Creation of cross object formula field

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

6. And give the label name has Account Website
7. Select formula return type **Text**
8. In the formula field enter this formula Account. Website.
9. Click next you will navigate to field level security click on visible checkbox so that it is visible to all profiles.
10. Select the next option, select the page layout and save it.

The screenshot shows the Salesforce Setup interface for a custom field named 'Account Website' on the 'Contact' object. The page is titled 'Contact Custom Field Account Website' and includes a 'Back to Contact Fields' link. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area is divided into 'Field Information' and 'Formula Options' sections. The 'Field Information' section contains fields for Field Label, Field Name, API Name, Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By, and Modified By. The 'Formula Options' section contains fields for Data Type and Formula. The 'Field Information' section is currently expanded, showing the following values: Field Label: Account Website, Field Name: Account_Website, API Name: Account_Website__c, Description: To locate product in Warehouse, Data Owner: (blank), Field Usage: (blank), Data Sensitivity Level: (blank), Compliance Categorization: (blank), Created By: Janobius Shamila J., 25/10/2023, 8:53 pm, and Modified By: Janobius Shamila J., 25/10/2023, 8:53 pm. The 'Formula Options' section is currently collapsed.

Setup > OBJECT MANAGER
Contact

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Hierarchy Columns
Scoping Rules
Triggers

Contact Custom Field
Account Website
Back to Contact Fields

Custom Field Definition Detail

Field Information

Field Label	Account Website	Object Name	Contact
Field Name	Account_Website		
API Name	Account_Website__c		
Description	To locate product in Warehouse		
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Janobius Shamila J., 25/10/2023, 8:53 pm	Modified By	Janobius Shamila J., 25/10/2023, 8:53 pm

Formula Options

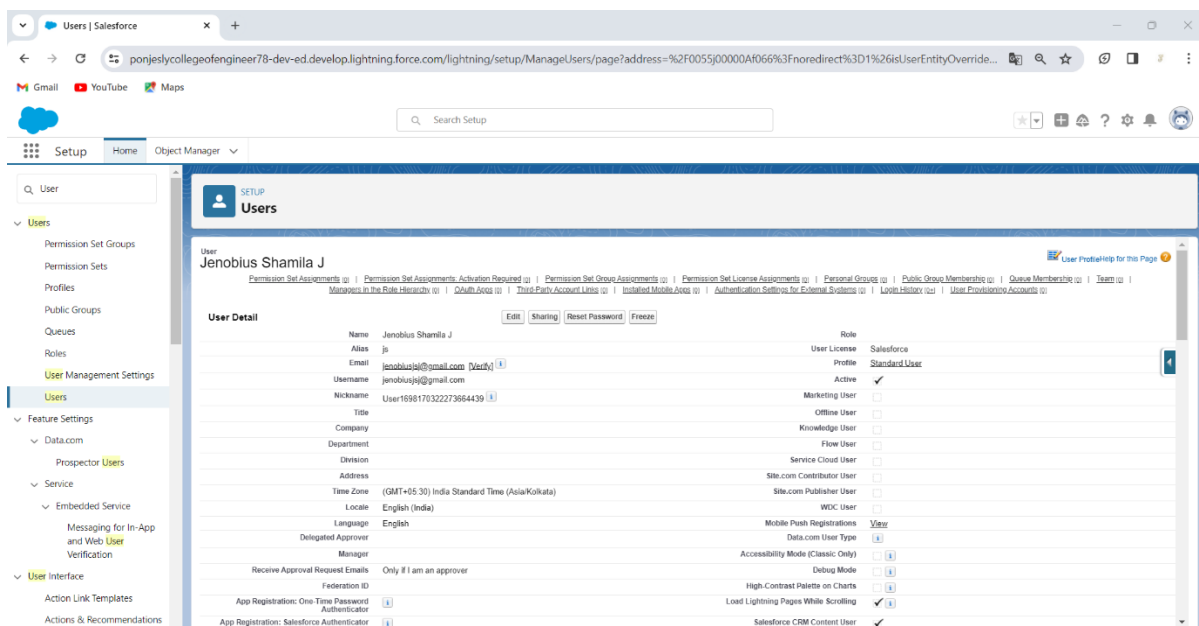
Data Type	Formula
-----------	---------

Account.Website

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 platform** 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.



The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar contains a navigation menu with options like 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Feature Settings', 'Data.com', 'Prospector Users', 'Service', 'Embedded Service', 'Messaging for In-App and Web User Verification', 'User Interface', 'Action Link Templates', and 'Actions & Recommendations'. The main content area is titled 'Users' and shows the details for a user named 'Jenobius Shamila J'. The 'User Detail' section includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, Federation ID, App Registration: One Time Password Authenticator, and App Registration: Salesforce Authenticator. The 'Role' section shows the 'User License' as 'Salesforce' and the 'Profile' as 'Standard User'. The 'Marketing User' checkbox is checked, and the 'Mobile Push Registrations' checkbox is also checked. The 'Accessibility Mode (Classic Only)' is set to 'Classic', and the 'Debug Mode' is set to 'Off'. The 'High Contrast Palette on Charts' is set to 'Off', and the 'Load Lightning Pages While Scrolling' is set to 'On'. The 'Salesforce CRM Content User' checkbox is checked.

Milestone- 07[Validation Rule]

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.

The screenshot shows the Salesforce Setup interface. The breadcrumb trail is: SETUP > OBJECT MANAGER > Account. The left sidebar contains a list of setup categories: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Hierarchy Columns, Scoping Rules, and Triggers. The main content area is titled 'Validation Rules' and shows '1 Items, Sorted by Rule Name'. A table lists the existing validation rule:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Account	Account.TextName	Phone number must begin with + (country code)	✓	Jenobius Shamila J, 24/10/2023, 11:36 pm

A 'New' button is located in the top right corner of the table.

Milestone- 08[User Adoption]

Create Record (Sales Order)

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

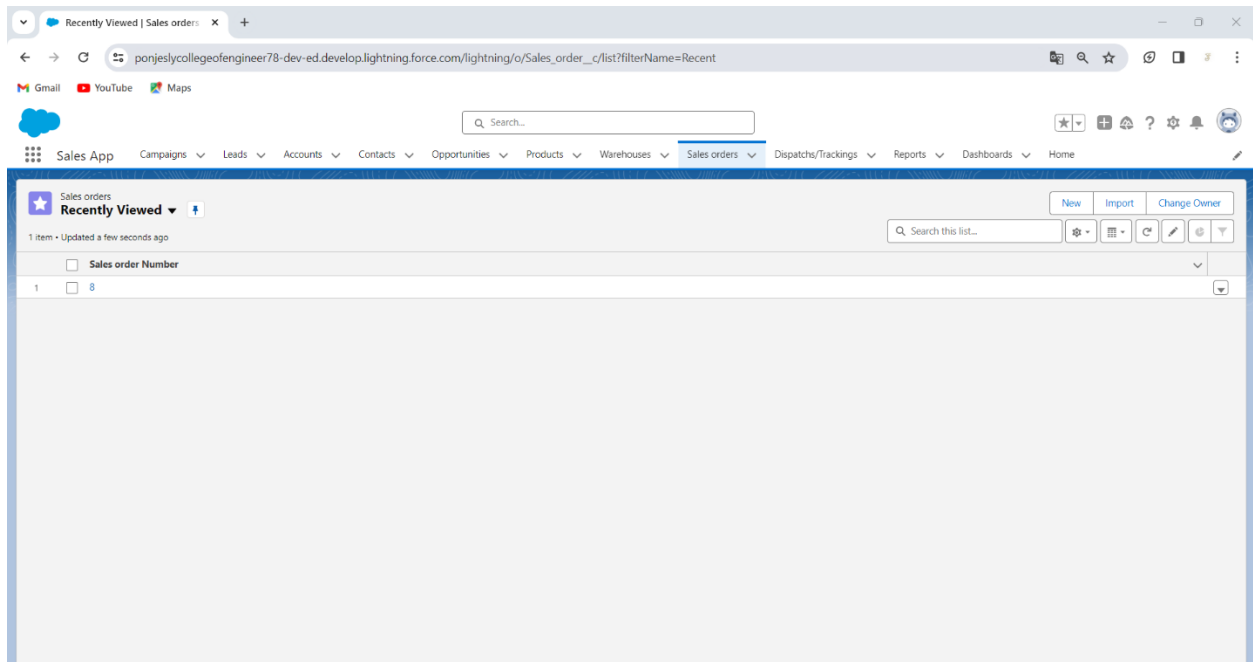
The screenshot shows the Salesforce 'New Sales order' form. The form is titled 'New Sales order' and is located in the 'Sales orders' section. The form contains the following fields:

- Sales order Number**: A text field.
- Status**: A dropdown menu with 'Open' selected.
- Customer**: A dropdown menu with 'United Oil & Gas Corp.' selected.
- Contact**: A dropdown menu with 'Oil Supply' selected.
- Order Date**: A date field with '29/10/2023' entered.
- Owner**: A dropdown menu with 'Jenobius Shamila J' selected.

At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

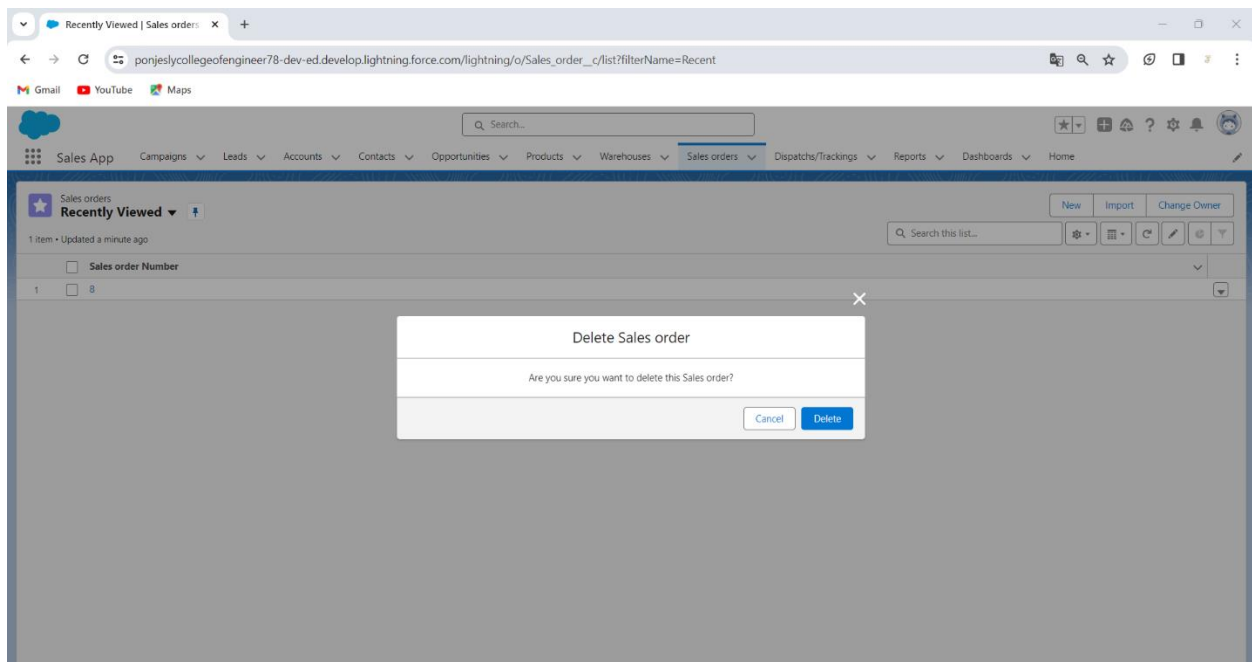
View Record (Sales Order)

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

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.

The screenshot shows a web browser window with the Salesforce Lightning interface. The browser's address bar displays the URL: `ponjeslycollegeofengineer78-dev-ed.develop.lightning.force.com/lightning/r/Report/0005j00000A0mDpEAJ/view?queryScope=userFolders`. The Salesforce navigation bar at the top includes the 'Sales App' icon and a menu with items: Campaigns, Leads, Accounts, Contacts, Opportunities, Products, Warehouses, Sales orders, Dispatches/Trackings, Reports (which is currently selected), Dashboards, and Home. A search bar is located to the right of the navigation bar.

The main content area displays the 'Report: Sales orders with Customer' titled 'New Sales orders with Customer Report'. In the top right corner of this section, there are buttons for 'Enable Field Editing', a search icon, 'Add Chart', and 'Edit'. Below the title, it indicates 'Total Records: 1'. A table is shown with two columns: 'Customer: Account Name' and 'Sales order: Sales order Number'. The table contains one data row for 'United Oil & Gas Corp. (1)' with a value of '8'. Below the data row, there are rows for 'Subtotal' and 'Total (1)'. At the bottom of the interface, there is a row of toggle switches for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total', all of which are currently turned on.

Customer: Account Name	Sales order: Sales order Number
United Oil & Gas Corp. (1)	8
Subtotal	
Total (1)	

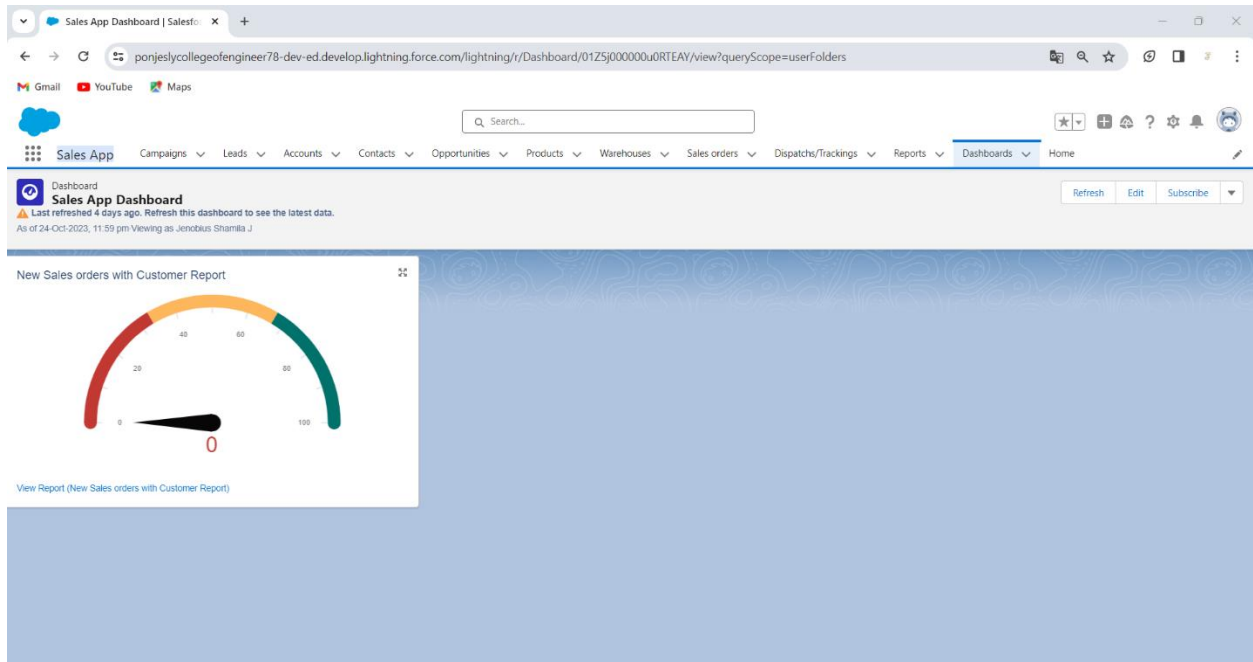
Milestone- 10[Dashboards]

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

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[Flow]

Create A 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
-
1. Left side corner of the page you can find a toggle click on that and select a new resource.
 2. and select resource type has variable
 3. Give api name as Recordid
 4. and select data type as Text
 5. At bottom for Availability outside the flow check the box as Available for Input
 6. Click on done
 7. Now below the start button click on add element and choose Get Records
 8. Now give the label name as Get Account Record
 9. For Get record of object choose object as – Account
 10. For Filter account records condition requirements are - All conditions are met Field-

Account id Operator- equals Value- Recordid
(variable which we had created)

11. For how many records to share - Only the first record
12. How to store record data- Automatically stores all fields.
13. Click on done.
14. Now again add the element below the Get account record and select Screen as your element
15. Give the label name as Get Account & Contact
16. Left side in the component section search for Name and drag it to the screen
17. Give the api name as Name
18. Now drag Email from component section and move it to the screen
19. Give the Api name- Email
Required - { !\$GlobalConstant.True }
20. Now drag the Phone from component to screen below the email
21. Give the Api name as - Phone
Required- { !\$GlobalConstant.True }
22. Now Drag Address from component section to screen
23. Give the Api name as - Address
City Value- { !Get_Account_Record.ShippingCity }

Country Value-

{!Get_Account_Record.BillingCountry}

Postal code-

{!Get_Account_Record.ShippingPostalCode}

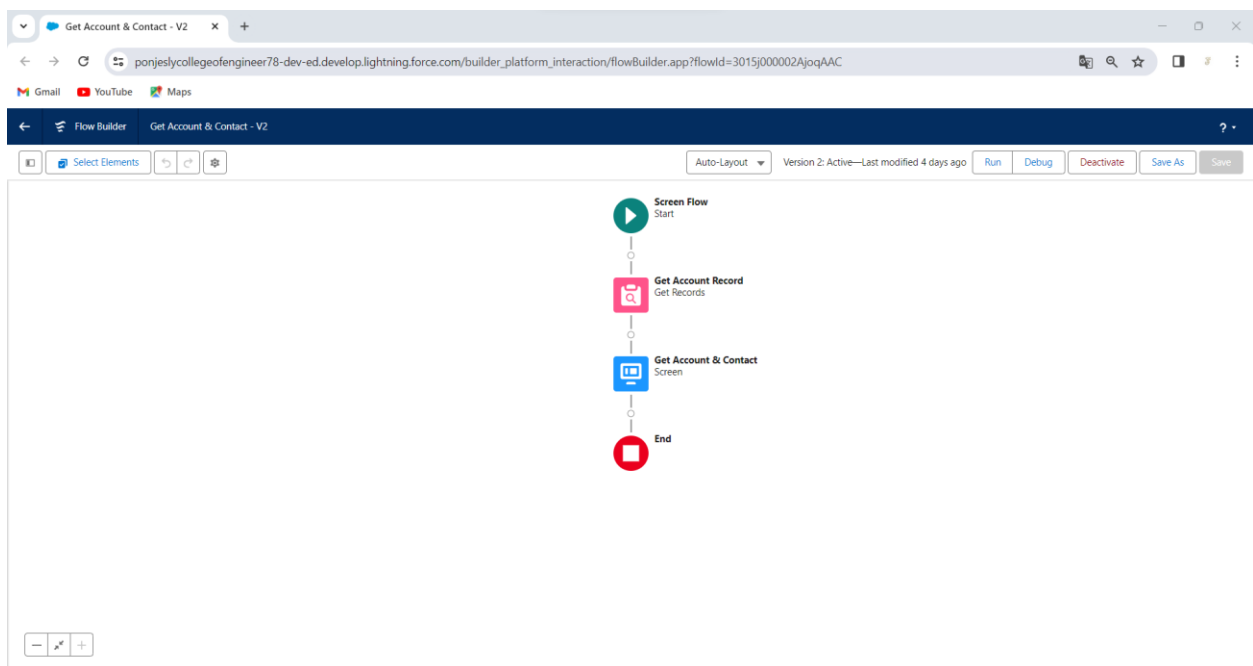
State/province value-

{!Get_Account_Record.ShippingState}

Street Value-

{!Get_Account_Record.ShippingStreet}

24. Click on done and save it. Give the label name as Get Account & Contact.



Milestone- 12[Apex Trigger]

Create An Apex Trigger

1. Click on setup gear
2. Below the setup gear you can find developer console click on that.
3. Click on file and select new and select **Apex trigger**.

Copy this code

```
trigger PreventDuplicateAccounts on Account (before
insert) {

    Set<String> accountNames = new Set<String>();

    for (Account acc : Trigger.new) {
        if (accountNames.contains(acc.Name)) {
            acc.addError('A duplicate account with this name already
exists.');
```

- ```
 } else {
 accountNames.add(acc.Name);
 }
 }
}
```
4. Save it.



**Demo Video Link:**

<https://drive.google.com/file/d/1DCPJ0HkqBYBlggVGZ5hhpvwVrJrIqRbL/view?usp=sharing>

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