A CRM APPLICATION TO ENGINEERING WORKS

Milestone 1-Salesforce developer account creation:

Task 1-Creating Developer Account:
Creating a developer org in salesforce.
Go to https://developer.salesforce.com/signup

On the sign up form, enter the following details :
First name & Last name
Email
Role : Developer
Company : College or Company Name
County : India
Postal Code : pin code
Username : should be a combination of your name and company
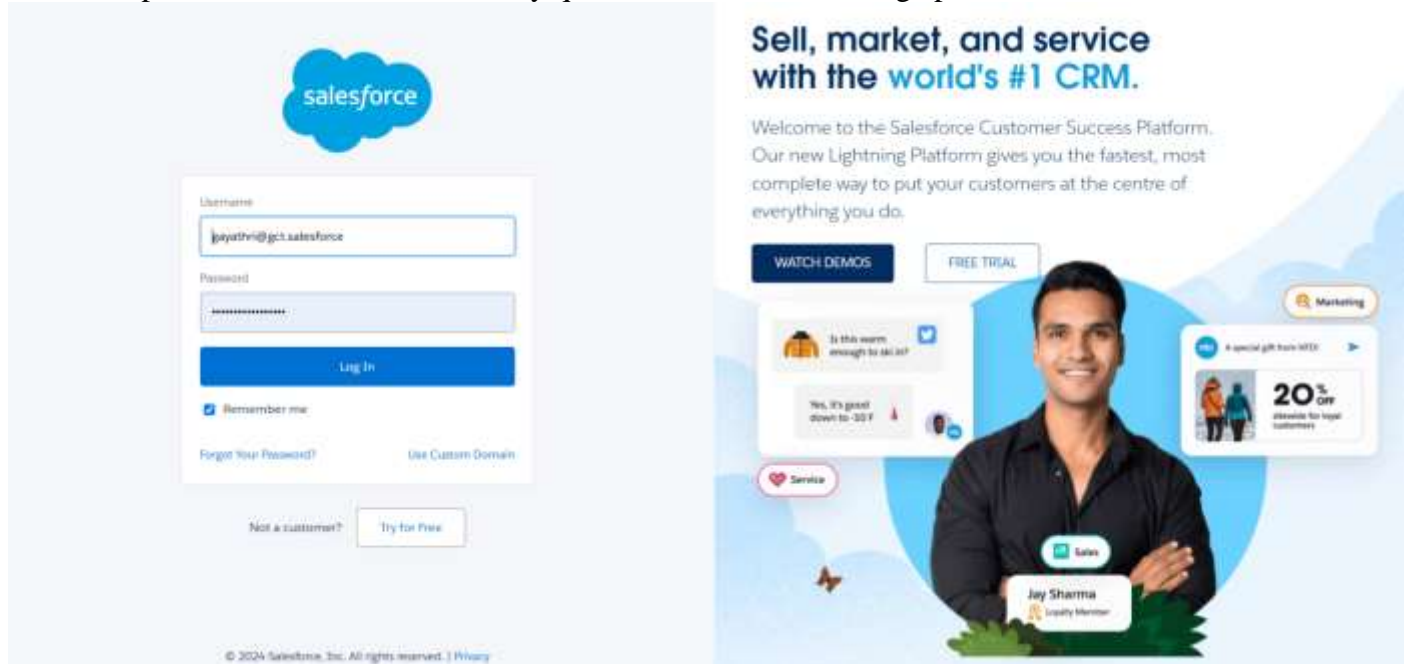
Task-2: Account Activation:

    Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.
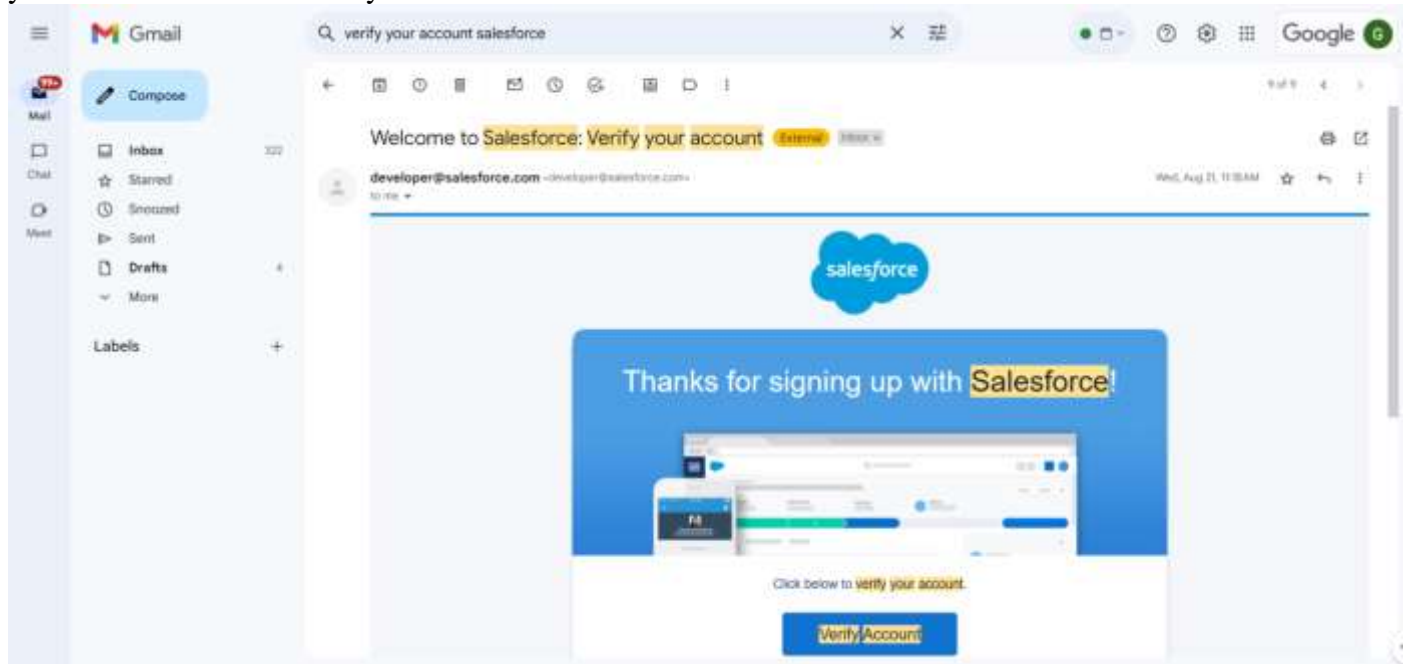
1. Click on Verify Account:
2. Give a password and answer a security question and click on change password.
3. Give a password and answer a security question and click on change password.

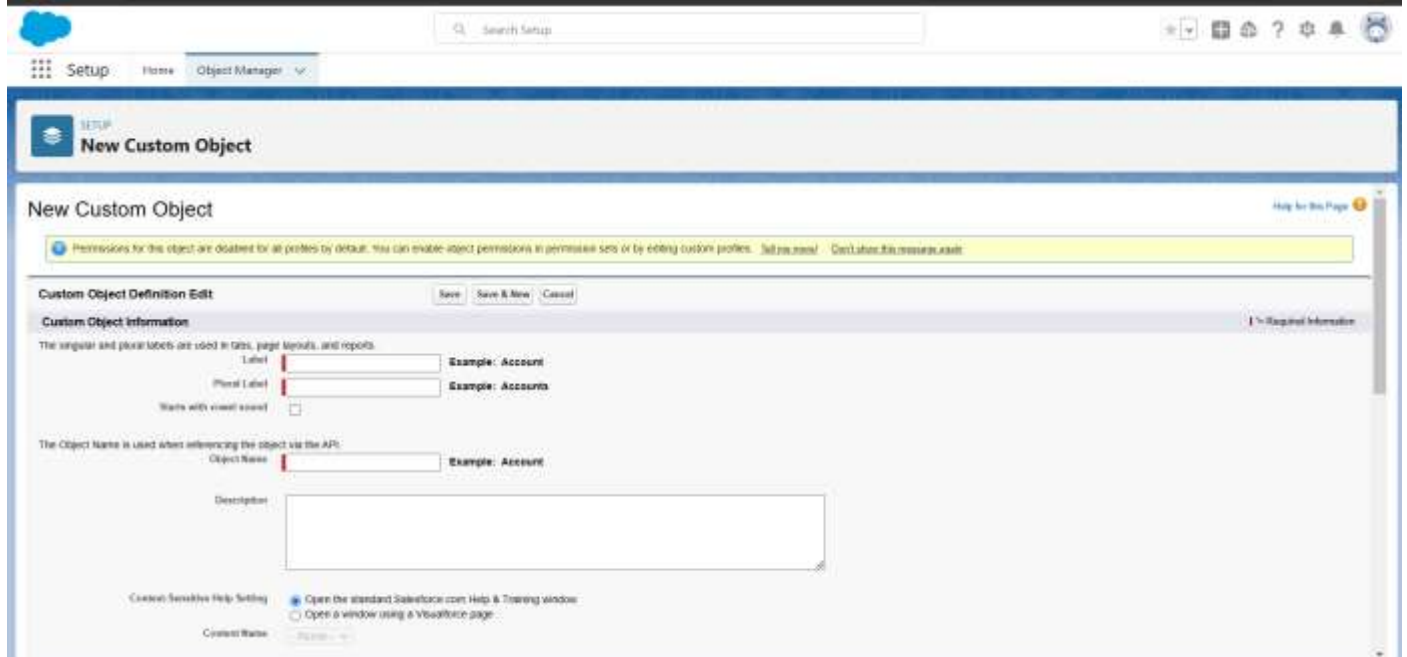4. Then you will redirect to your salesforce setup page.
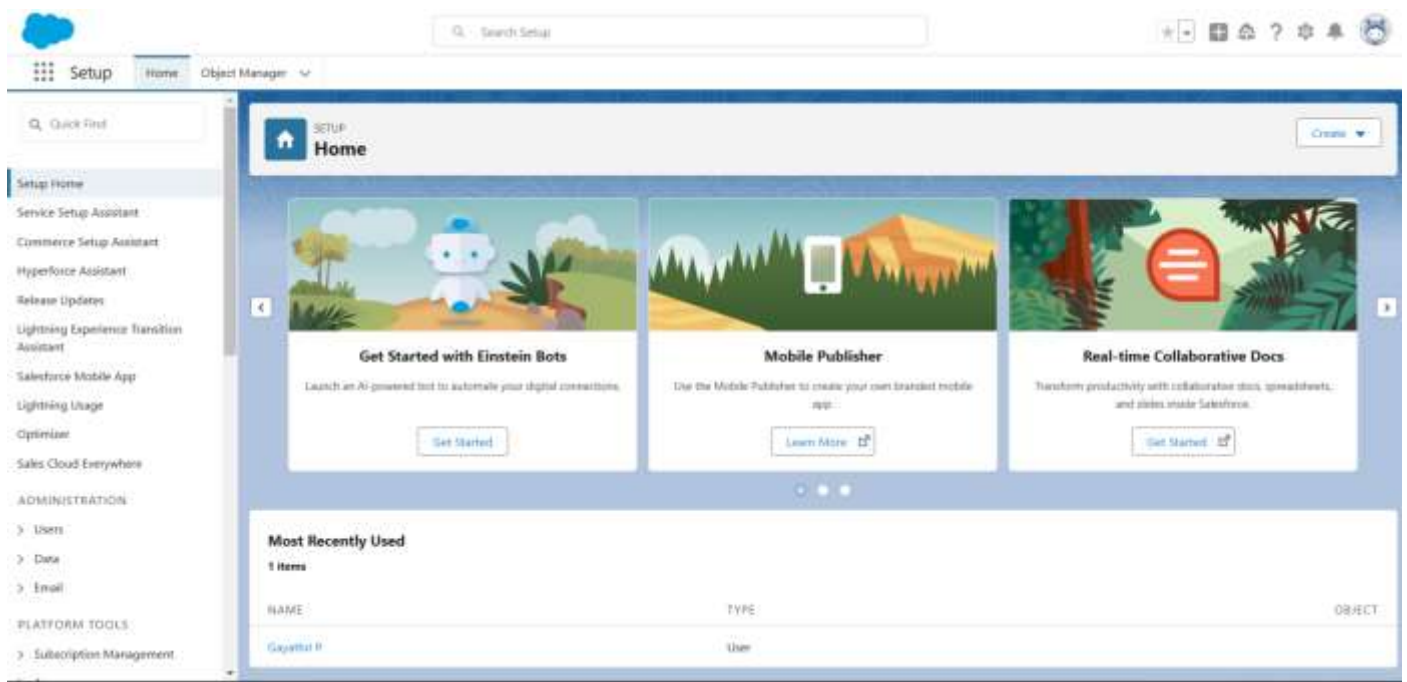
Milestone 2- Object :
Task1: Create Fabrication Object
To create an object:
From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

Enter the label name>> Fabrication
Plural label name >> Fabrications

Enter Record Name Label and Format
Record Name >> Fabrication Name
Data Type >> Text
Click on Allow reports and Track Field History,Allow Activities
Allow search >> Save.

Task 2-To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

Enter the label name >> Shed-Work
Plural label name >> Shed Works

Enter Record Name Label and Format
Record Name >> Shed Work Name
Data Type >> Text
Click on Allow reports and Track Field History,Allow Activities
Allow search >> Save.

Task-3:Create Pipe Lining Object
To create an object:
From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

Enter the label name >> Pipe Lining
Plural label name >> Pipe Linings

Enter Record Name Label and Format
Record Name >> Pipe Lining Name
Data Type >> Text
Click on Allow reports and Track Field History,Allow Activities
Allow search >> Save.

Task-4:create Worker Object
To create an object:
From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

Enter the label name >> Worker
Plural label name >> Workers

Enter Record Name Label and Format
Record Name >> Worker Name
Data Type >> Text
Click on Allow reports and Track Field History,Allow Activities
Allow search >> Save.

Milestone 3- Tabs:

What is Tab : A tab is like a user interface that is used to build records for objects and to view the records in the objects.

Creating a Custom Tab

To create a Tab:(Fabrication)

Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)

Select Object(Fabrication) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .

Make sure that the Append tab to users' existing personal customizations is checked.

Click save.

Task-2: Creating Remaining Tabs
Now create the Tabs for the remaining Objects, they are "Shed-Work, Pipe lining, Worker".

Follow the same steps as mentioned in Activity -1

Milestone 4 : The Lightning App
Task-1:
Create a Lightning App
To create a lightning app page:
Go to setup page >> search "app manager" in quick find >> select "app manager" >> click on New lightning App.

2. Fill the app name in app details and branding as follow
App Name : Engineering Works
Developer Name : This will auto populated
Image : optional (if you want to give any image you can otherwise not mandatory) Primary color hex value : keep this default.

3.Then click Next >> (App option page)Set Navigation Style as Standard Navigation >> Next.
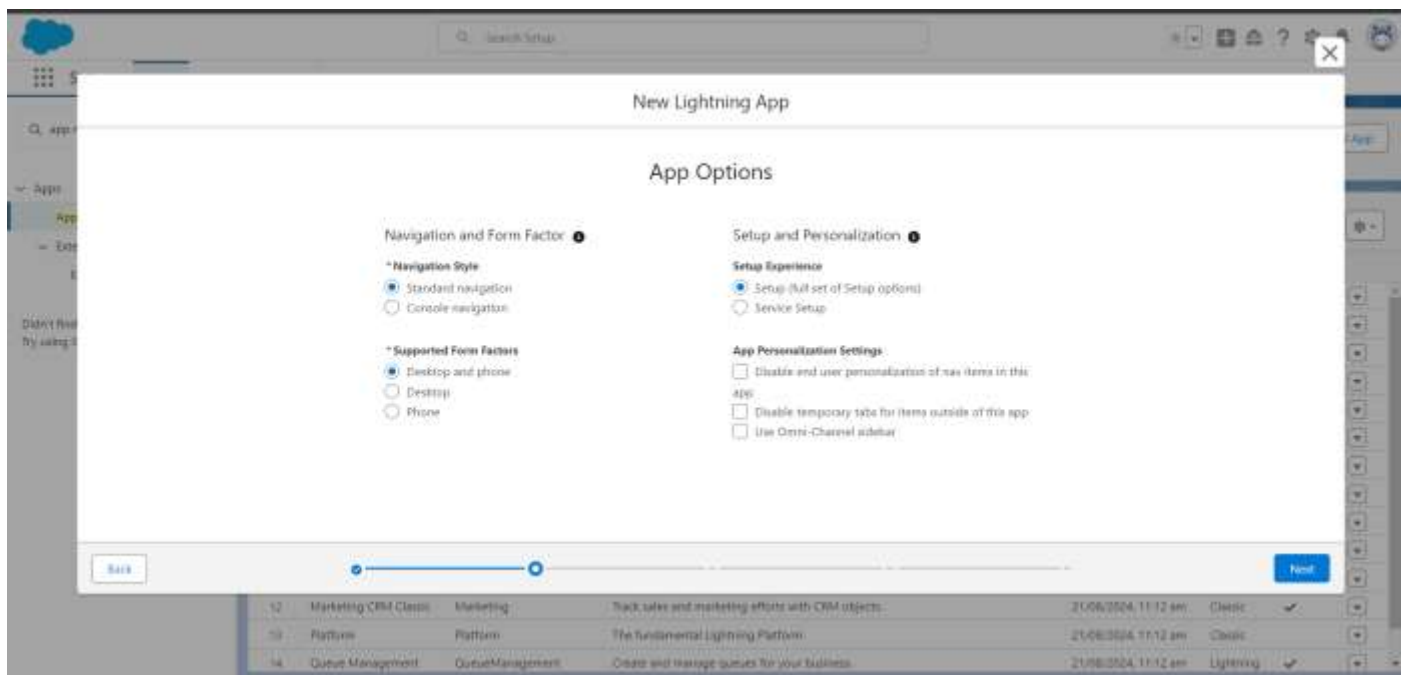
5. (Utility Items) keep it as default >> Next.

5. To Add Navigation Items:

Search for the item in the (Fabrications, Shed Works, Pipe Linings, Workers) from the search bar and move it using the arrow button >> Next >> Next.
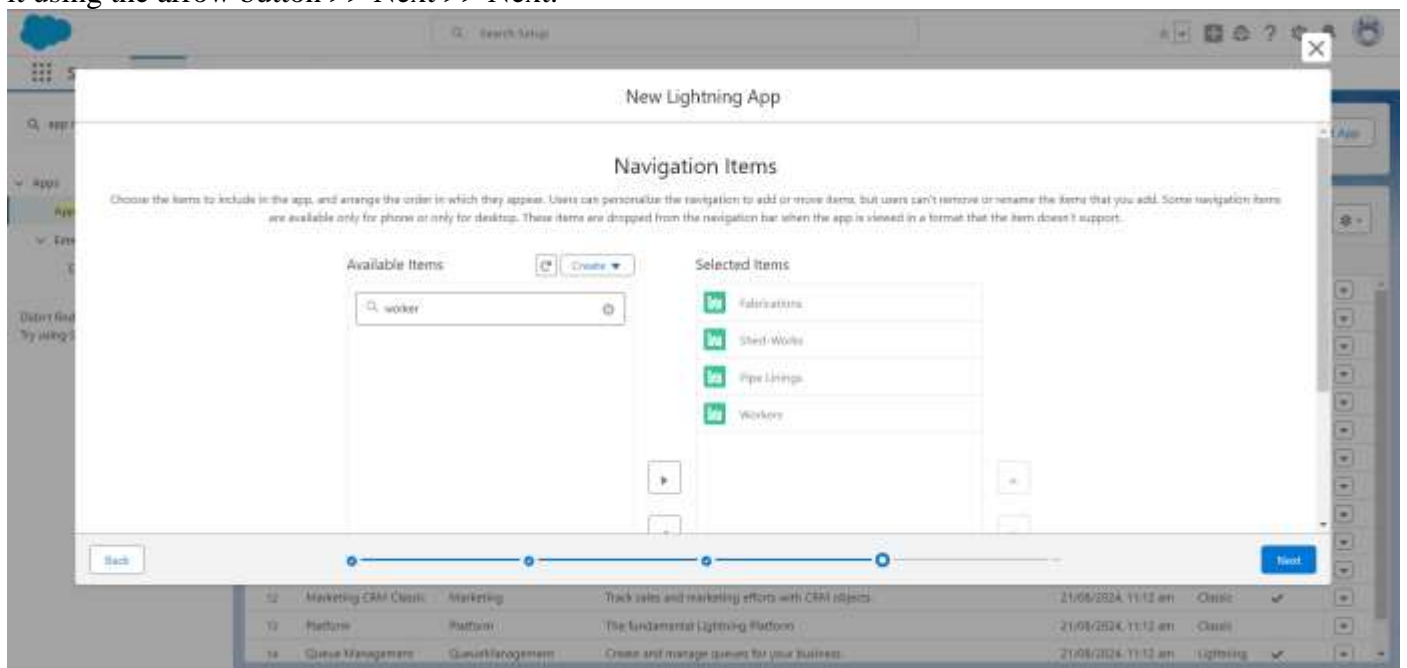
6. To Add User Profiles:

Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.
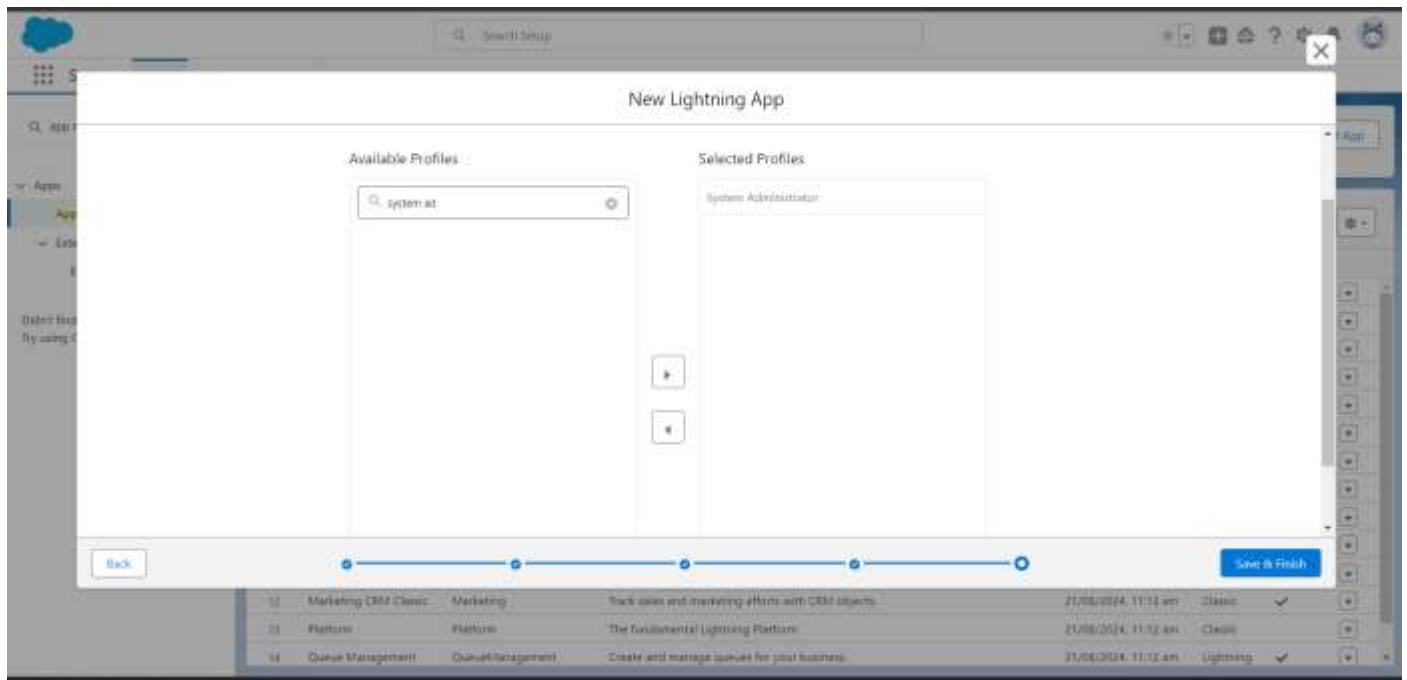
Milestone 5 : Fields
Task-1:Creation of fields for the Fabrication object
To create fields in an object:

Go to setup >> click on Object Manager >> type object name(Fabrication) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data Type as a "Text"

Click on next

5. Fill the Above as following:

Field Label: Name of the Owner

Field Name : Name_of_the_Owner

Length : 125

Required :check box

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Fabrication) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New
Select Data type as a "Text" and Click on Next

Fill the Above as following:

Field Label : Name of Company

Field Name : Name_of_Company

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Fabrication) in search bar >> click on the object.
Now click on "Fields & Relationships" >> New
Select Data type as a "Number" and Click on Next

Fill the Above as following:

Field Label: Length

Field Name : Length

Length : 16

Decimal Value : 2

Required :check box

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Fabrication) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Number" and Click on Next

Fill the Above as following:

Field Label: Breadth

Field Name : Breadth

Length : 16

Decimal Value : 2

Required :check box

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Fabrication) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Number" and Click on Next

Fill the Above as following:

Field Label: Width

Field Name : Width

Length : 16

Decimal Value : 2

Required :check box

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Fabrication) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Formula" and Click on Next

Fill the Above as following:

Field Label: Area

Field Name : Area

Formula Return Type : Select Number

Enter Formula : Length__c * Breadth__c * Width__c (Insert this fields using "Insert Field" Option)

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Fabrication) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Number" and Click on Next

Fill the Above as following:

Field Label: Cost per Meter

Field Name : Cost_per_meter

Set the Default value to '2'

Click on Next >> Select the read only checkbox

Click on Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Fabrication) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Number" and Click on Next

Fill the Above as following:

Field Label: Quantity

Field Name : Quantity

Length : 16

Decimal Value : 2

Required :check box

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Fabrication) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Formula" and Click on Next

Fill the Above as following:

Field Label: Amount

Field Name : Amount

Formula Return Type : Select Currency

Enter Formula : Area__c * Cost_per_meter__c * Quantity_c(Insert this fields using "Insert Field" Option)

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Fabrication) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Picklist" and Click on Next

Fill the Above as following:

Field Label: Material Type

Field Name : Material_Type

Values : Select Enter values, with each value separated by a new line

Enter this values in box :

Iron

Aluminum

Metal

Wood

Steel

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Fabrication) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Currency" and Click on Next

Fill the Above as following:

Field Label: Final Price

Field Name : Final_Price

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Fabrication) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Email" and Click on Next

Fill the Above as following:

Field Label: Email

Field Name : Email

Click on Next >> Next >> Save.

Task-2:Creation of fields for the Shed-Work object

1. Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

2. Now click on "Fields & Relationships" >> New

3. Select Data type as a "Text" and Click on Next

4. Fill the Above as following:

Field Label : Name of the Company

Field Name : gets auto generated

Click on required check box

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Text" and Click on Next

Fill the Above as following:

Field Label : Name of the Owner

Field Name : Name_of_Owner

Click on required check box

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Number" and Click on Next

Fill the Above as following:

Field Label: Height

Field Name : Height

Length : 16

Decimal Value : 2

Required :check box

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Number" and Click on Next

Fill the Above as following:

Field Label: Breadth

Field Name : Breadth

Length : 16

Decimal Value : 2

Required :check box

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Number" and Click on Next
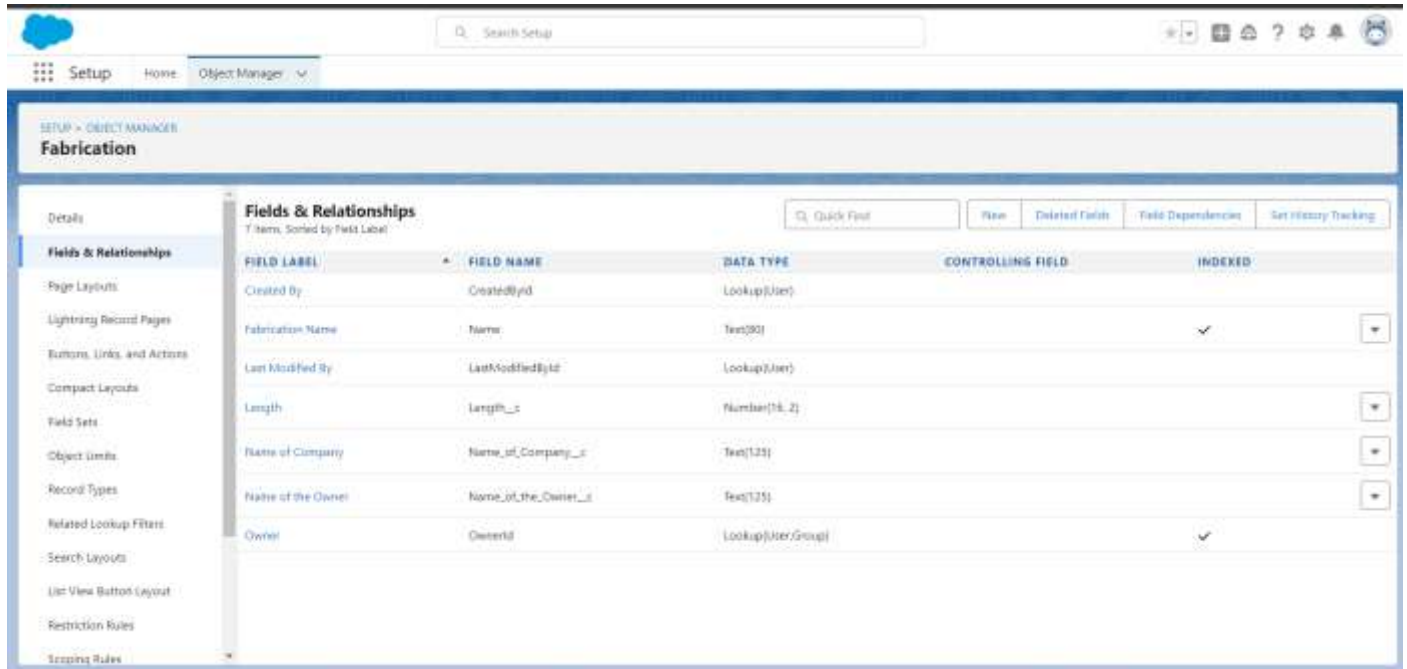
Fill the Above as following:

Field Label: Width

Field Name : Width

Length : 16

Decimal Value : 2

Required :check box

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >>click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Formula" and Click on Next

Fill the Above as following:

Field Label: Area

Field Name : Area

Formula Return Type : Select Number

Enter Formula : Height__c * Breadth__c * Width__c (Insert this fields using "Insert Field" Option)

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

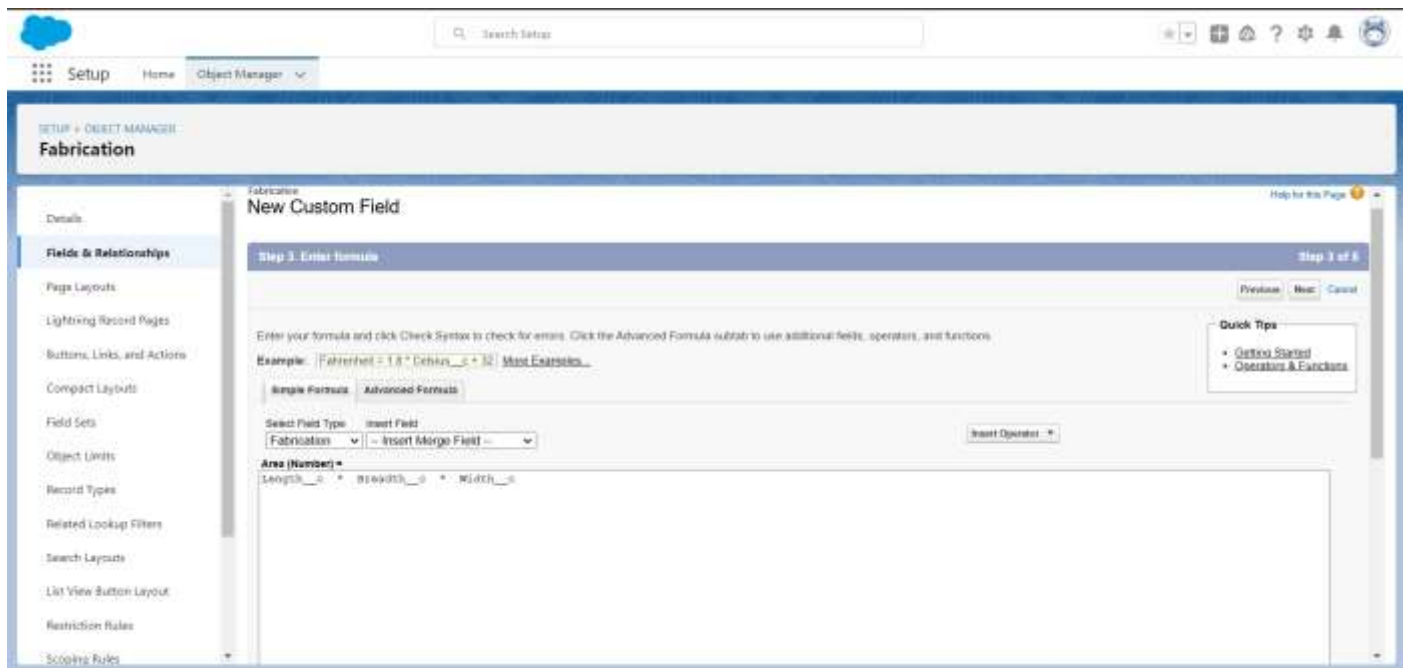Select Data type as a "Formula" and Click on Next

Fill the Above as following:
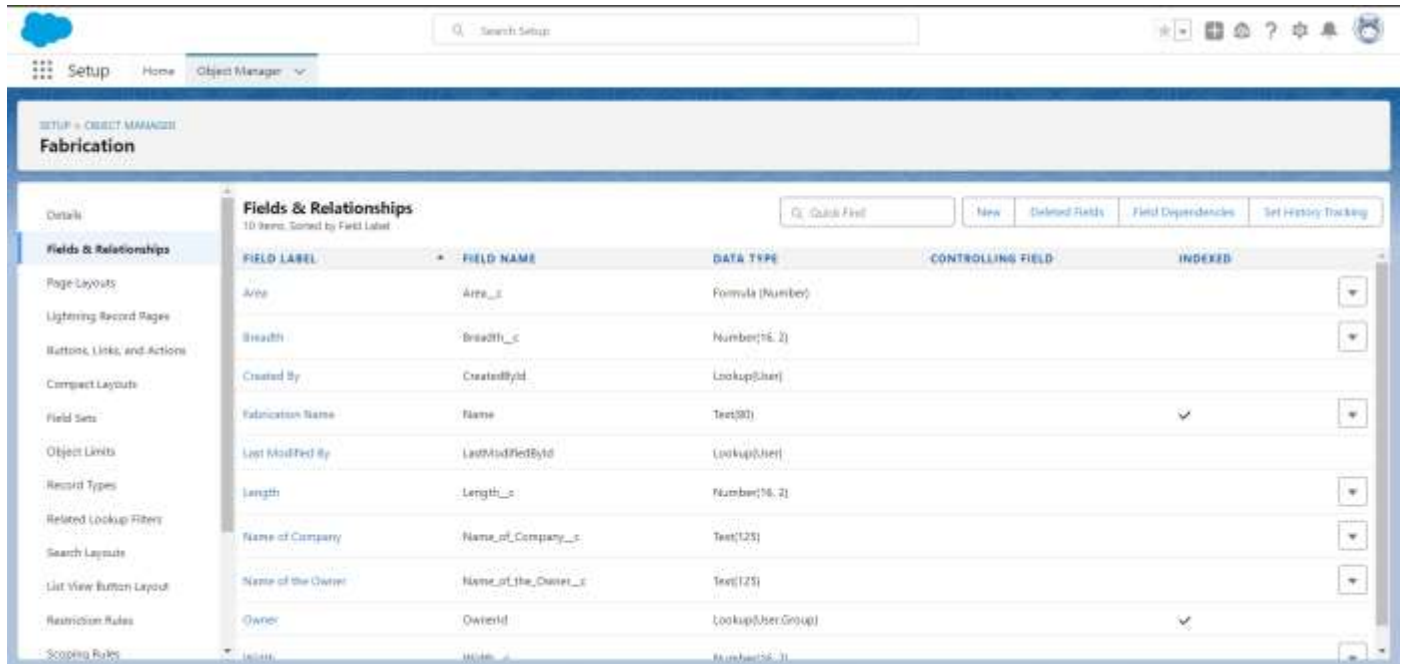
Field Label: Area Sheet

Field Name : Area_Sheet

Formula Return Type : Select Number

Enter Formula : Height__c * Breadth__c (Insert this fields using "Insert Field" Option)

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Number" and Click on Next

Fill the Above as following:

Field Label: Cost per Meter

Field Name : Cost_per_meter

Set the Default value to '2'

Click on Next >> Select the read only checkbox

Click on Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Number" and Click on Next

Fill the Above as following:

Field Label: Quantity

Field Name : Quantity

Length : 16

Decimal Value : 2

Required :check box

Click on Next >> Next >> Save and new

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Number" and Click on Next

Fill the Above as following:

Field Label: Cost per meter sheet

Field Name : Cost_per_meter_sheet

Set the Default value to '2'

Click on Next >> Select the read only checkbox

Click on Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Formula" and Click on Next

Fill the Above as following:

Field Label: Amount

Field Name : Amount

Formula Return Type : Select Currency

Enter Formula : Area__c * Cost_per_meter__c * Quantity_c(Insert this fields using "Insert Field" Option)

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Formula" and Click on Next

Fill the Above as following:

Field Label: Amount Sheet

Field Name : Amount_Sheet

Formula Return Type : Select Currency

Enter Formula : Cost_per_meter_sheet__c * Area_Sheet__c * Quantity_c(Insert this fields using "Insert Field" Option)

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Picklist" and Click on Next

Fill the Above as following:

Field Label: Material Type

Field Name : Material_Type

Values : Select Enter values, with each value separated by a new line

Enter this values in box :

Iron

Metal

Steel

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Picklist" and Click on Next
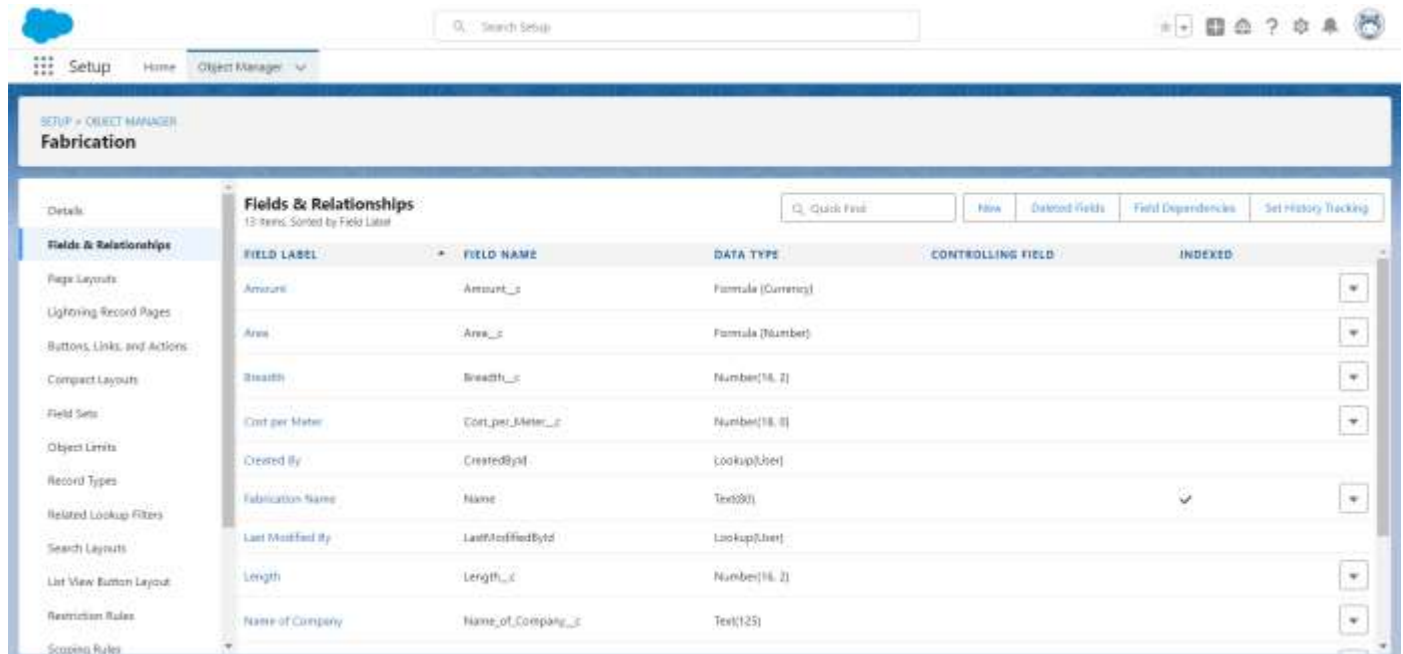
Fill the Above as following:

Field Label: Material Type Sheet

Field Name : Material_Type_Sheet

Values : Select Enter values, with each value separated by a new line

Enter this values in box :

Plastic

Metal

Rubber

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Currency" and Click on Next

Fill the Above as following:

Field Label: Final Price

Field Name : Final_Price

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Email" and Click on Next

Fill the Above as following:

Field Label: Email

Field Name : Email

Click on Next >> Next >> Save.

Creation of fields for the Pipe Lining object

1. Go to setup >> click on Object Manager >> type object name(Pipe Lining) in search bar >> click on the object.

2. Now click on "Fields & Relationships" >> New

3. Select Data type as a "Text" and Click on Next

4. Fill the Above as following:

Field Label : Name of the Company

Field Name : gets auto generated

Click on required check box

Click on Next >> Next >> Save and new.

To create another fields in an object:

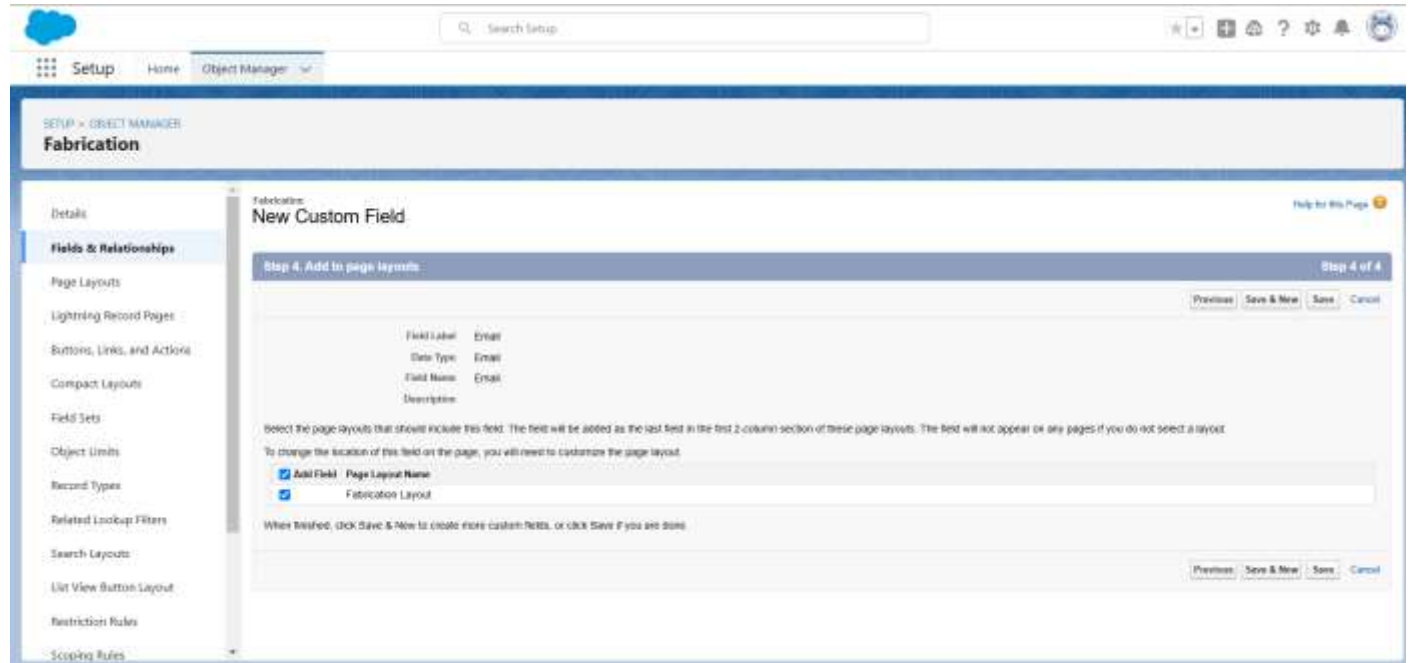Go to setup >> click on Object Manager >> type object name(Pipe Lining) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New
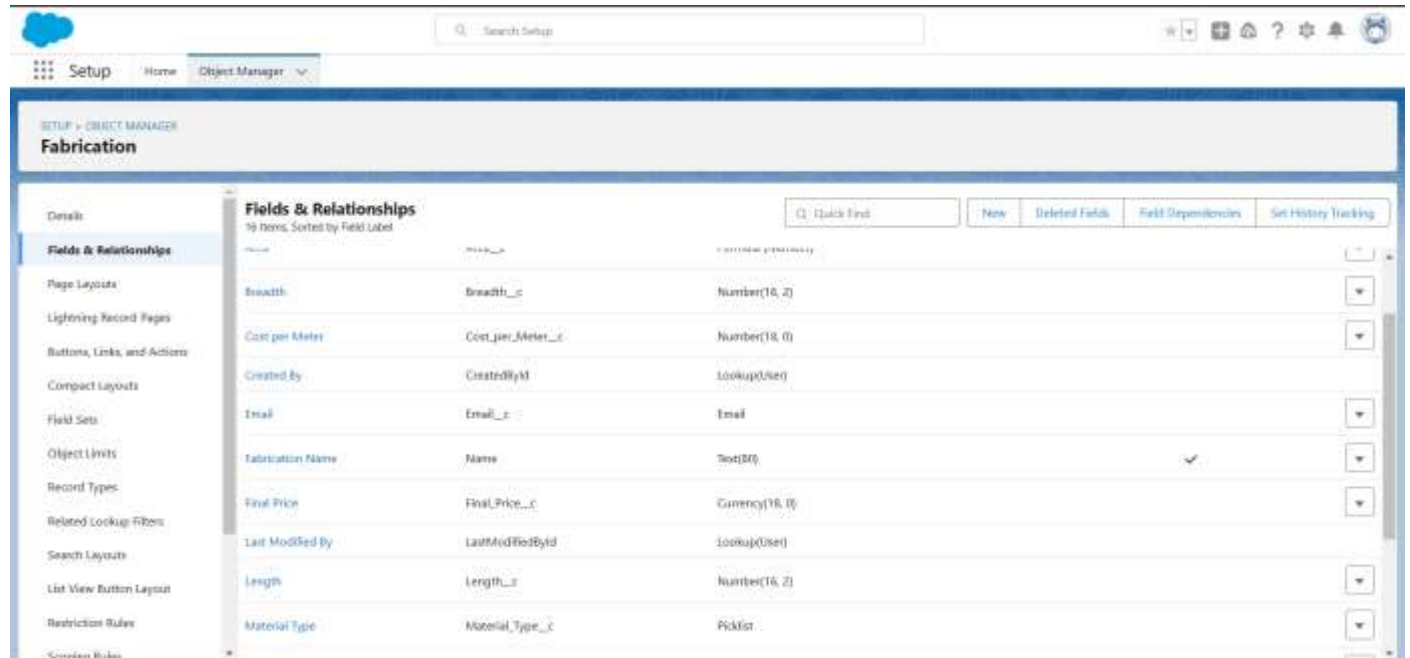
Select Data type as a "Text" and Click on Next

Fill the Above as following:

Field Label : Name of the Owner

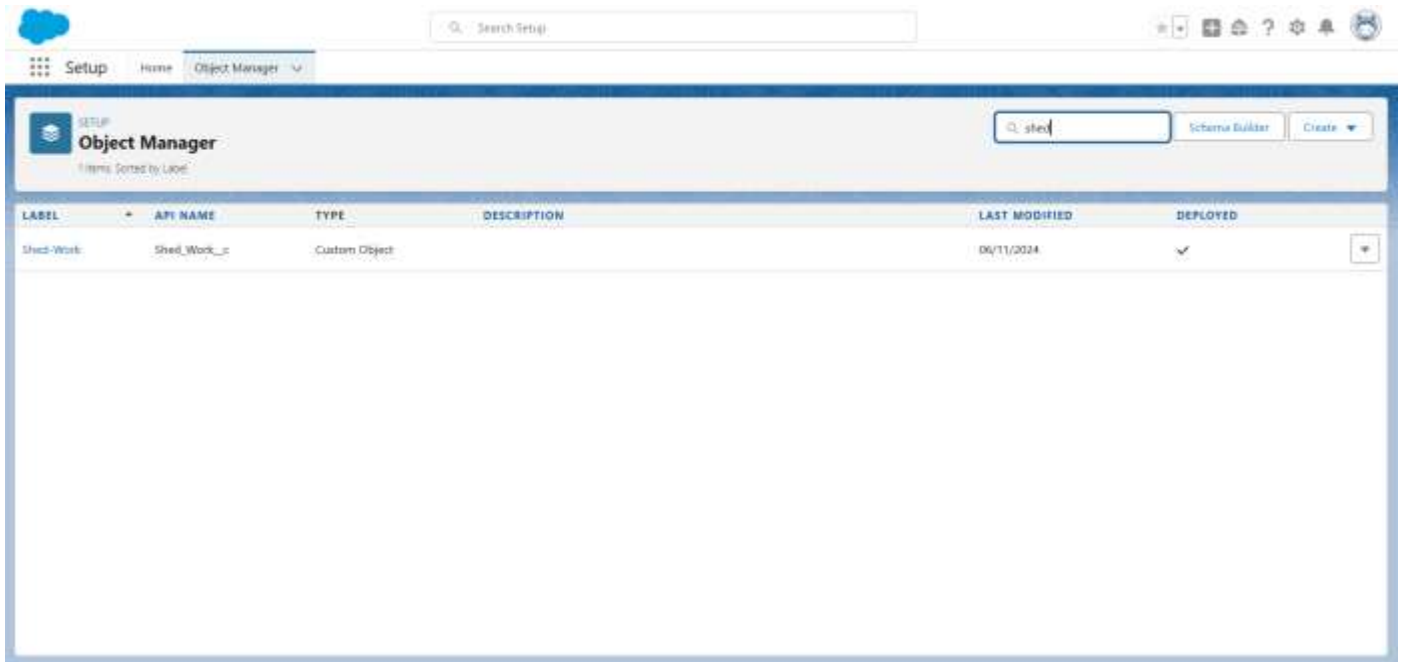Field Name : Name_of_Owner

Click on required check box

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Pipe Lining) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Number" and Click on Next

Fill the Above as following:

Field Label: Height

Field Name : Height

Length : 16

Decimal Value : 2

Required :check box

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Pipe Lining) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Number" and Click on Next

Fill the Above as following:

Field Label: Width

Field Name : Width

Length : 16

Decimal Value : 2

Required :check box

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Pipe Lining) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Number" and Click on Next

Fill the Above as following:

Field Label: Diameter

Field Name : Diameter

Length : 16

Decimal Value : 2

Required :check box

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Pipe Lining) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Formula" and Click on Next

Fill the Above as following:

Field Label: Area

Field Name : Area

Formula Return Type : Select Number

Enter Formula : PI() * Height__c * Diameter__c (Insert this fields using "Insert Field" Option)

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Pipe Lining) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Number" and Click on Next

Fill the Above as following:

Field Label: Cost per Meter

Field Name : Cost_per_meter

Set the Default value to '2'

Click on Next >> Select the read only checkbox

Click on Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Pipe Lining) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Number" and Click on Next

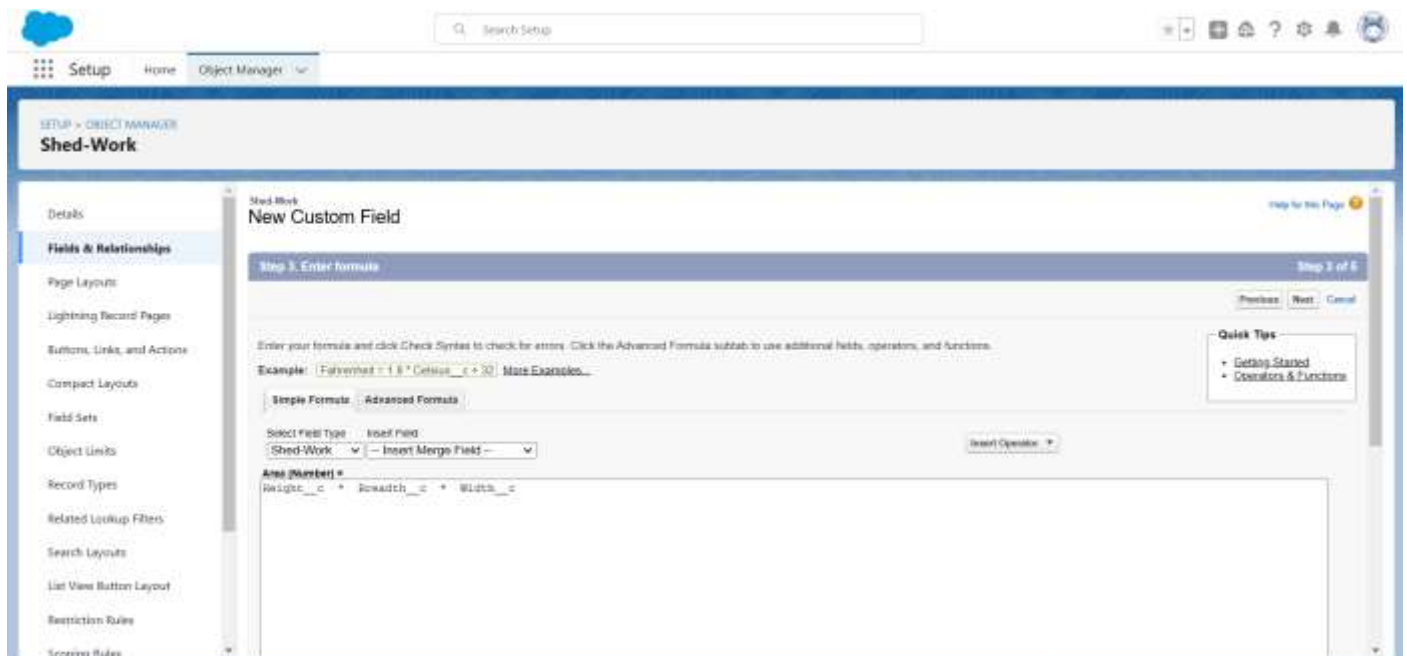Fill the Above as following:

Field Label: Quantity

Field Name : Quantity

Length : 16

Decimal Value : 2

Required :check box

Click on Next >> Next >> Save and new

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Pipe Lining) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Formula" and Click on Next

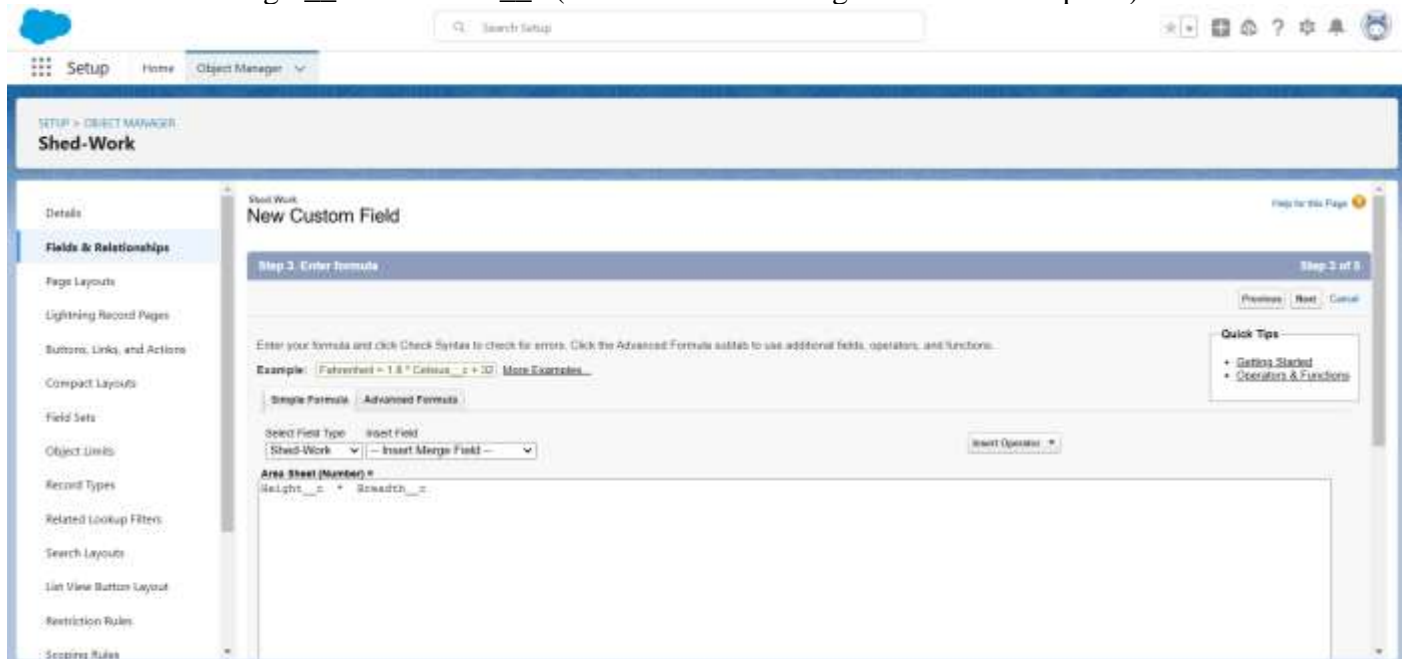Fill the Above as following:

Field Label: Amount

Field Name : Amount

Formula Return Type : Select Currency

Enter Formula : Area__c * Cost_per_meter__c * Quantity_c(Insert this fields using "Insert Field" Option)

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Pipe Lining) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Picklist" and Click on Next
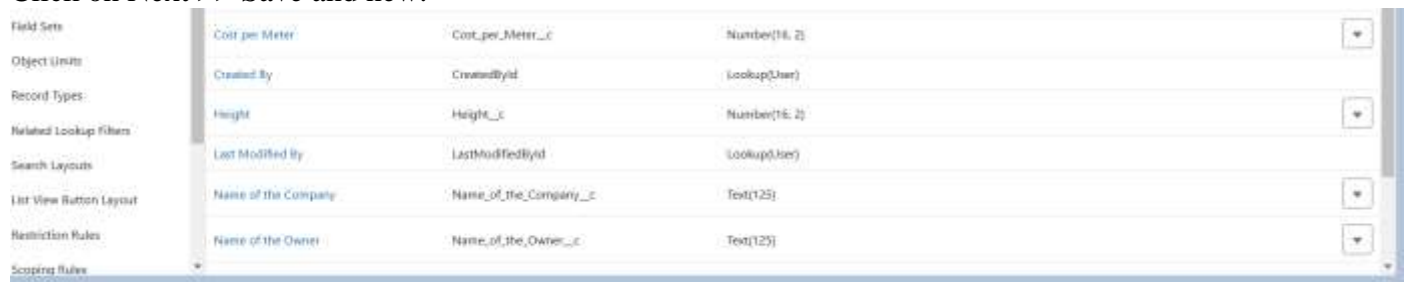
Fill the Above as following:

Field Label: Material Type

Field Name : Material_Type

Values : Select Enter values, with each value separated by a new line

Enter this values in box :

Iron

Metal

Aluminum

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Pipe Lining) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Currency" and Click on Next

Fill the Above as following:

Field Label: Final Price

Field Name : Final_Price

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Pipe Lining) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New
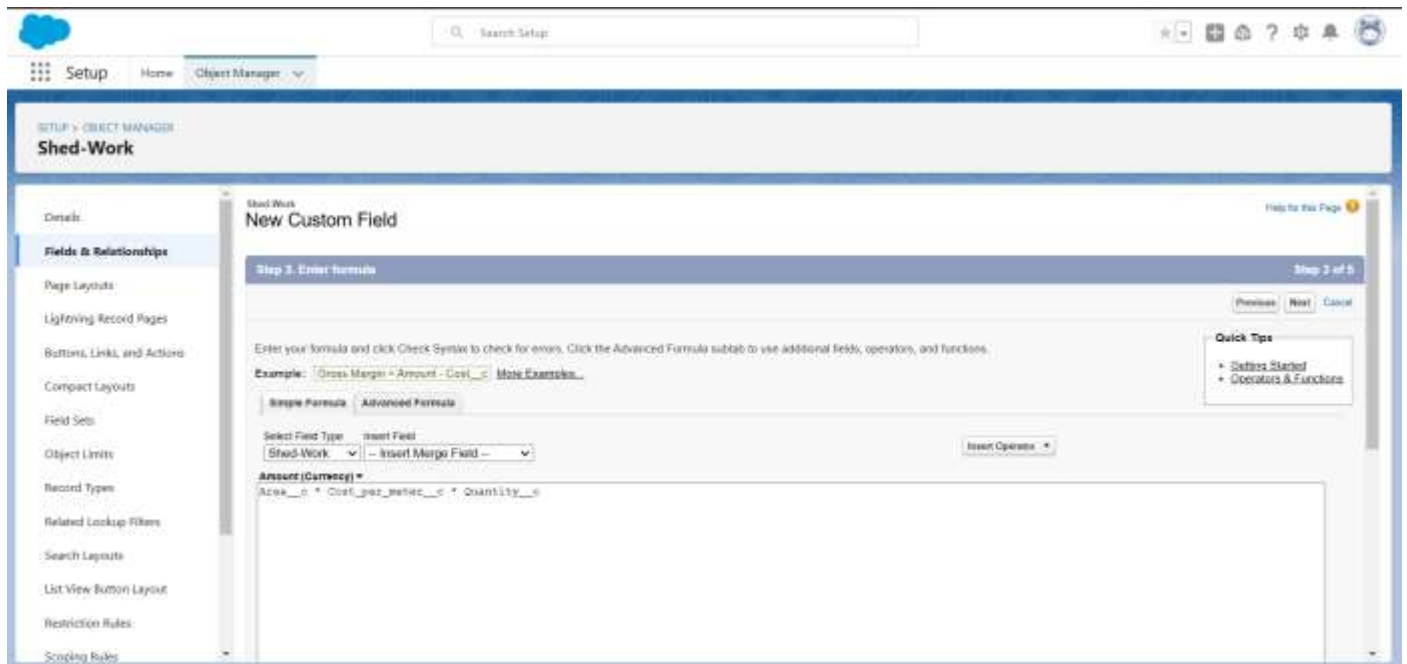
Select Data type as a "Email" and Click on Next

Fill the Above as following:

Field Label: Email

Field Name : Email

Click on Next >> Next >> Save

Task-4:reation of fields for the Worker object

Go to setup >> click on Object Manager >> type object name(Worker) in search bar >> click on the object.
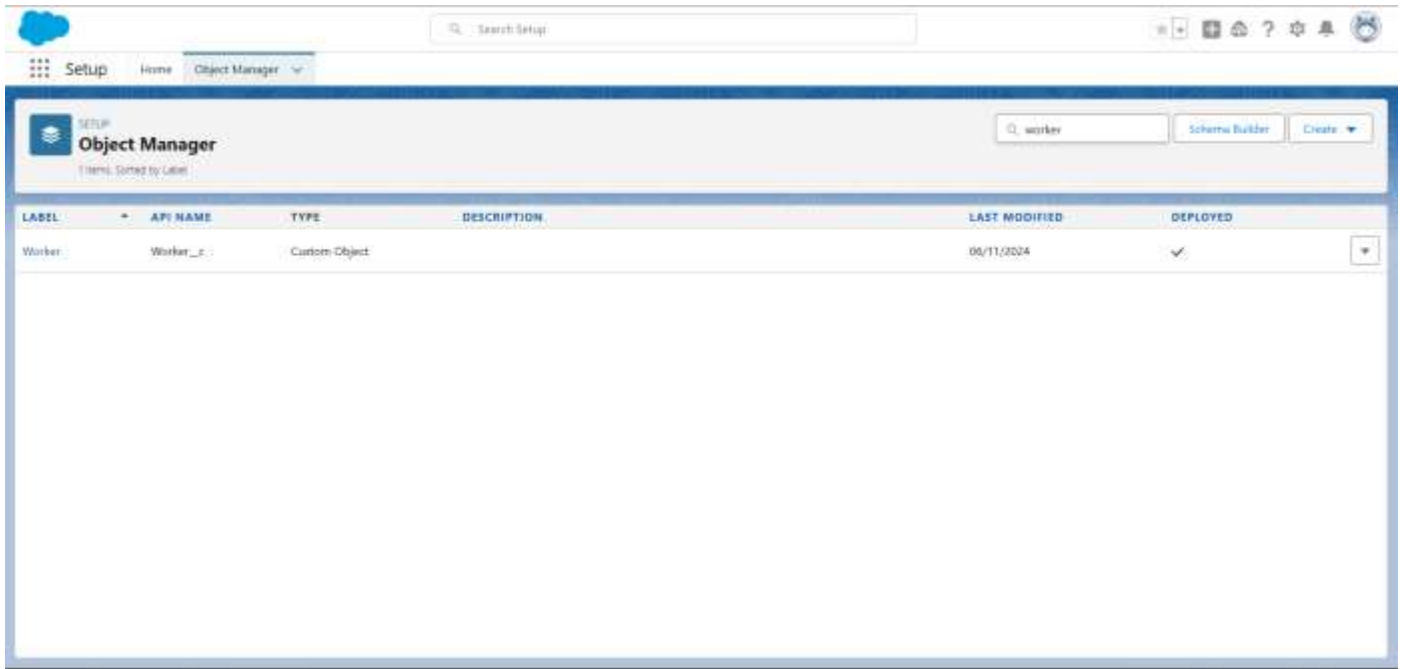
2. Now click on "Fields & Relationships" >> New
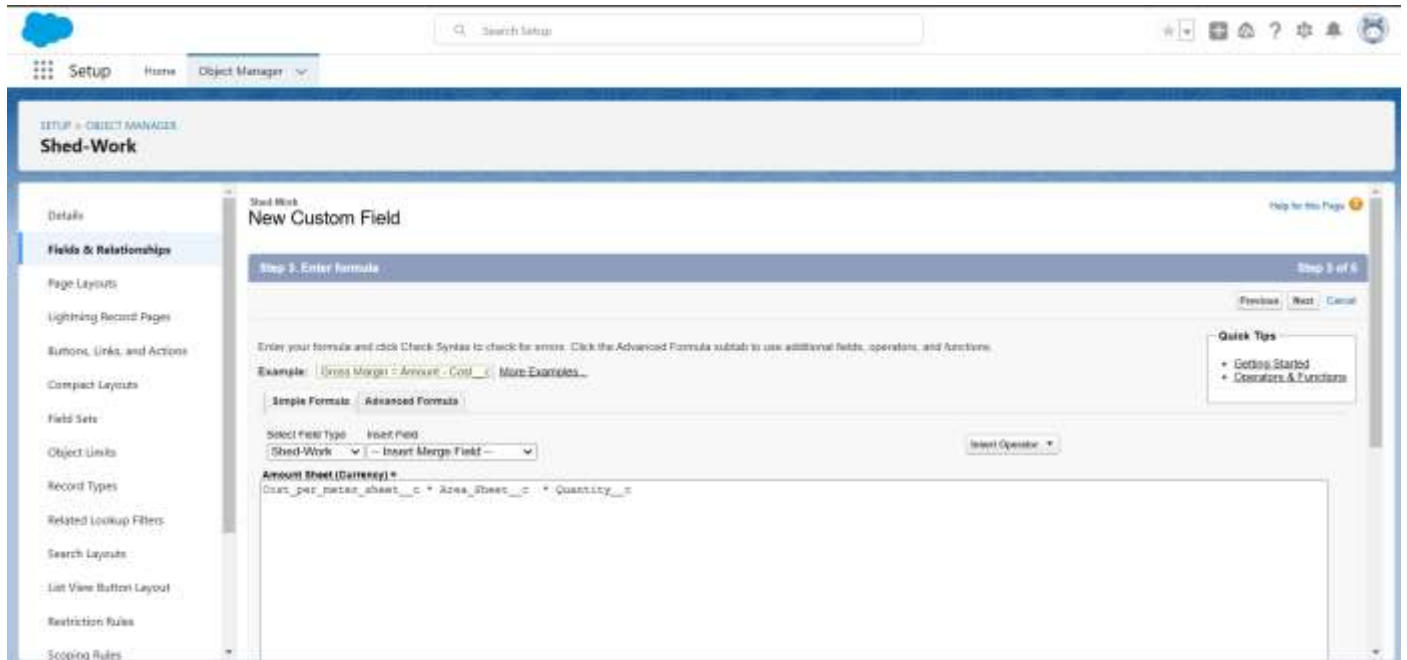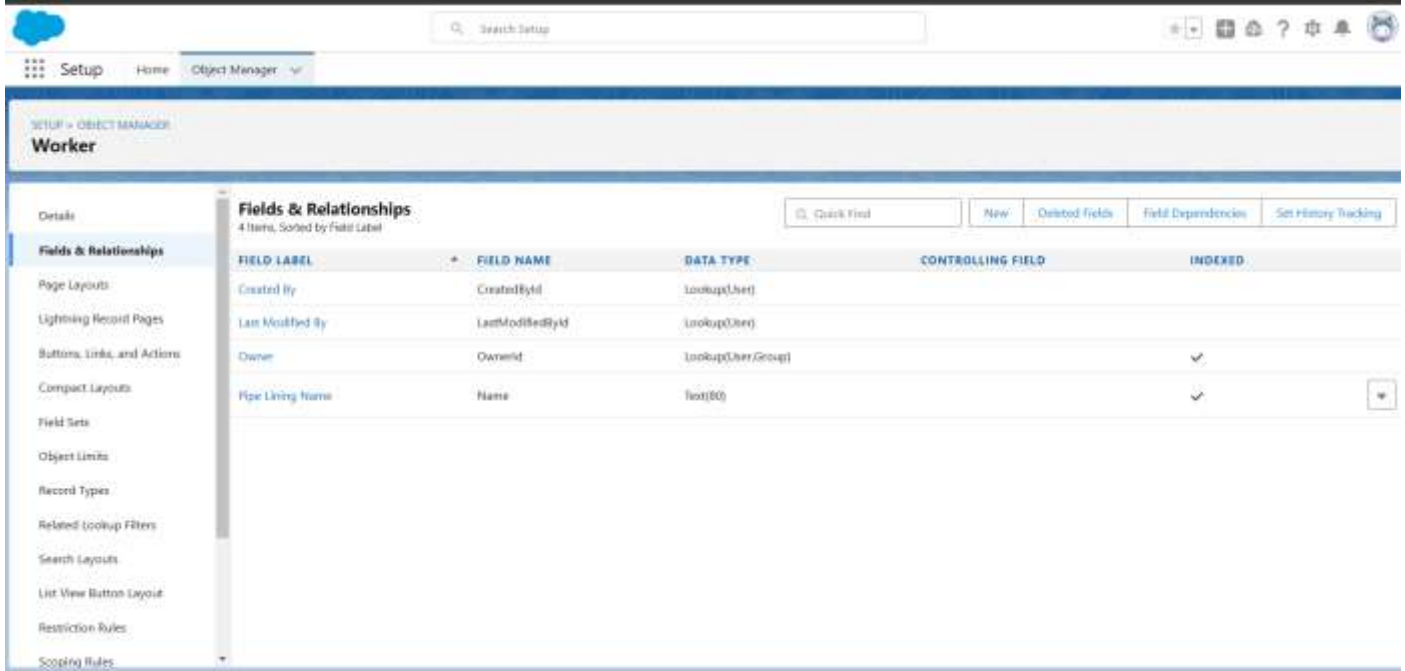

3. Select Data type as a "Text" and Click on Next

4. Fill the Above as following:

Field Label : Worker Name

Field Name : gets auto generated

Length : 125

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Worker) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Number" and Click on Next

Fill the Above as following:

Field Label: Phone Number

Field Name : Phone_Number

Length : 10

Required :check box

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Worker) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Picklist" and Click on Next

Fill the Above as following:

Field Label: Designation

Field Name : Designation

Values : Select Enter values, with each value separated by a new line

Enter this values in box :

Accountant

Welder

Driller

Pitter

Manager

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Worker) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a "Currency" and Click on Next

Fill the Above as following:

Field Label: Salary

Field Name : Salary

Length : 10

Required :check box

Click on Next >> Next >> Save and new.

Creation of Lookup fields
Creation of Lookup Field on Worker Object :

Go to setup>> click on Object Manager >> type object name(Worker) in the search bar >> click on the object.
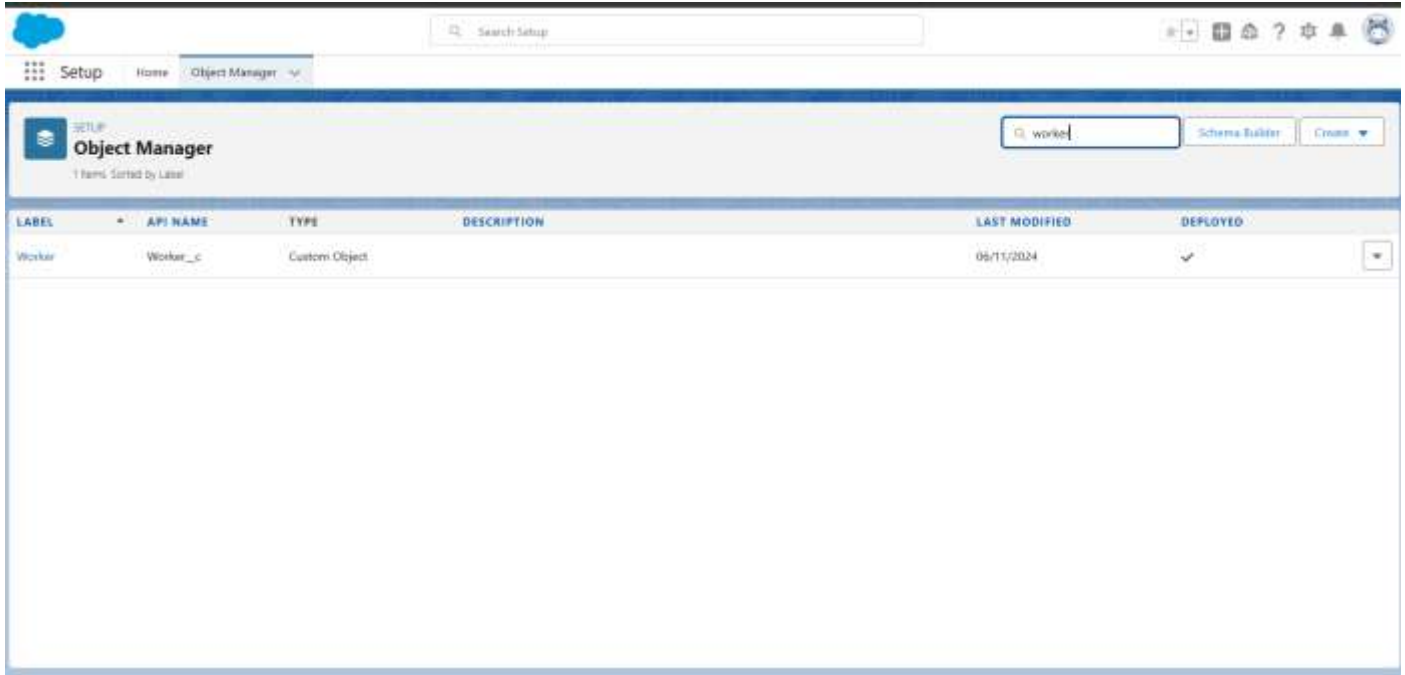
Now click on "Fields & Relationships" >> New

Select lookup relationship

Select the related object "Fabrication" and click next.

Field Name : Fabrication

Field label : Auto generated
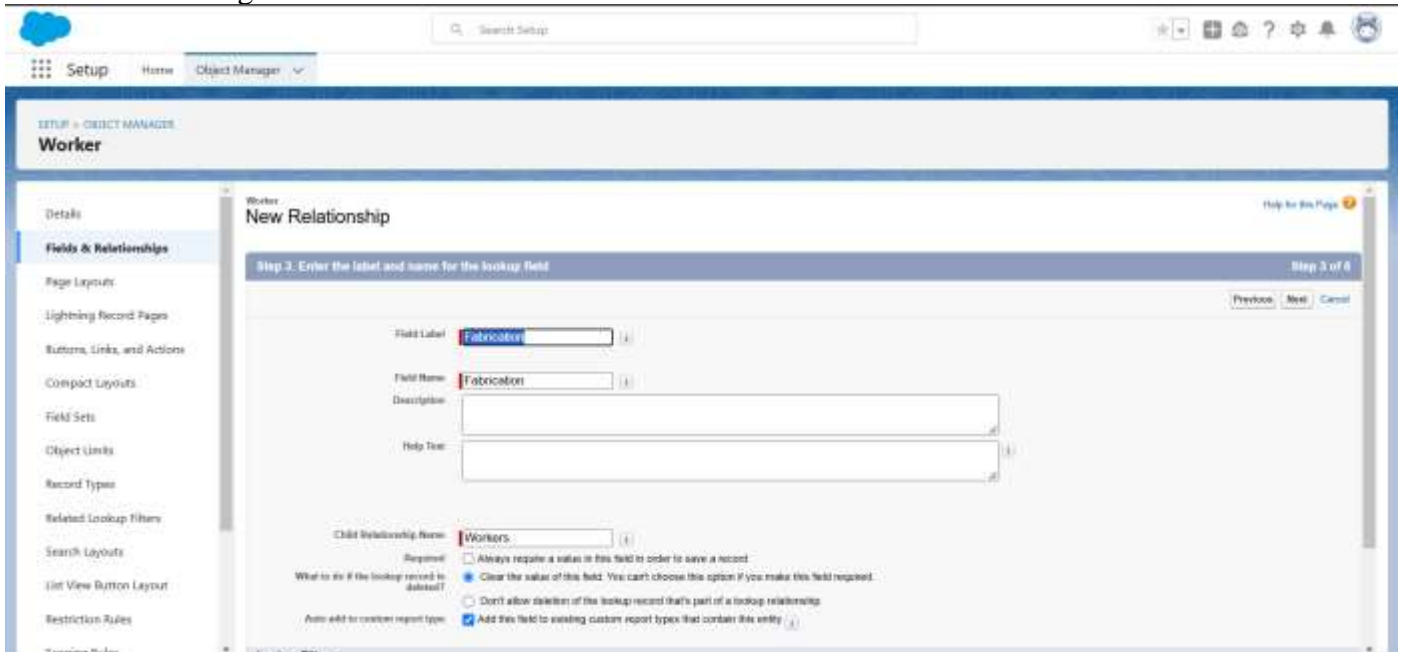
Next >> Next >> Save.

Creation of Lookup Field on Worker Object :

Go to setup >> click on Object Manager >> type object name(Worker) in the search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select lookup relationship

Select the related object "Shed-Work" and click next.

Field Name : Shed-Work

Field label : Auto generated

Next >> Next >> Save.

Creation of Lookup Field on Worker Object :

Go to setup >> click on Object Manager >> type object name(Worker) in the search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select lookup relationship

Select the related object "Pipe Lining" and click next.

Field Name : Pipe Lining

Field label : Auto generated

Next >> Next >> Save.

Milestone 6: Creation of Page Layouts
Here we have to create Four Page Layouts (For Drilling, For Welding, For Cutting, For Folding)
Task-1:
To create a Page Layout in Fabrication Object for Drilling
Go to the setup page >> click on object manager >> From drop down click edit for Fabrication object.

Click on the Page Layouts >> click New.

Enter details as

Page Layout Name : Drilling Page Layout

Click on Save

Drag and Arrange the field as shown below

Click Save.

Go to the setup page >> click on object manager >> From drop down click edit for Fabrication object.

Click on the Page Layouts >> click New.

Enter details as

Page Layout Name : Welding Page Layout

Click on Save

Drag and Arrange the field as shown below

Click Save.

Task-3: To create a Page Layout in Fabrication Object for Cutting
Go to the setup page >> click on object manager >> From drop down click edit for Fabrication object.

Click on the Page Layouts >> click New.

Enter details as

Page Layout Name : Cutting Page Layout

Click on Save

Drag and Arrange the field as shown below

Click Save.
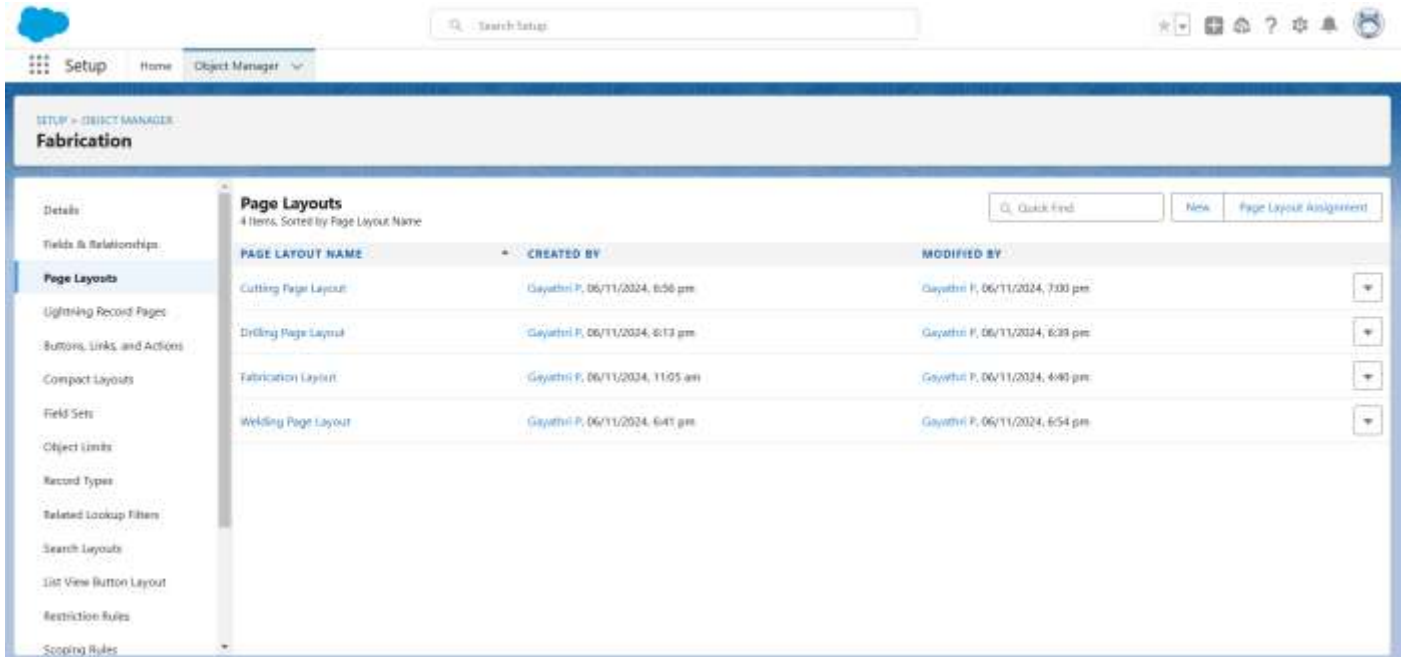
To create a Page Layout in Fabrication Object for Folding
Go to the setup page >> click on object manager >> From drop down click edit for Fabrication object.

Click on the Page Layouts >> click New.

Enter details as

Page Layout Name : Folding Page Layout

Click on Save

Drag and Arrange the field as shown below

Click Save
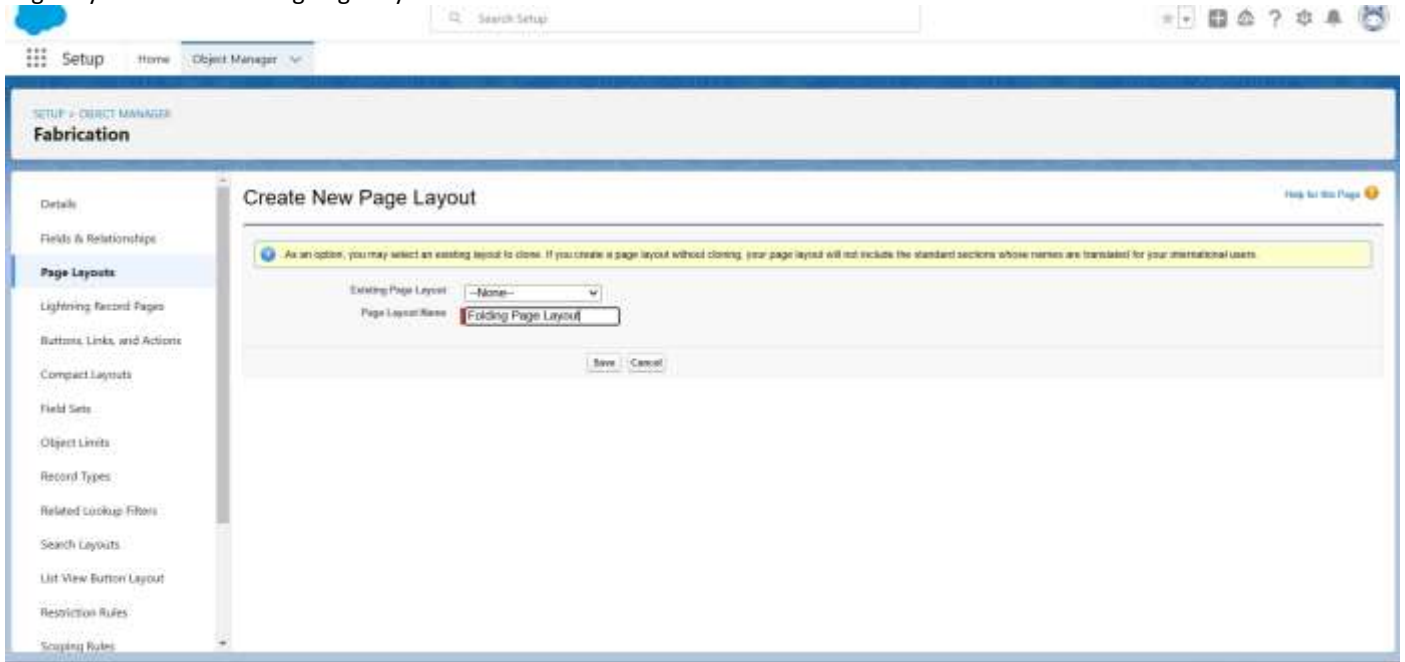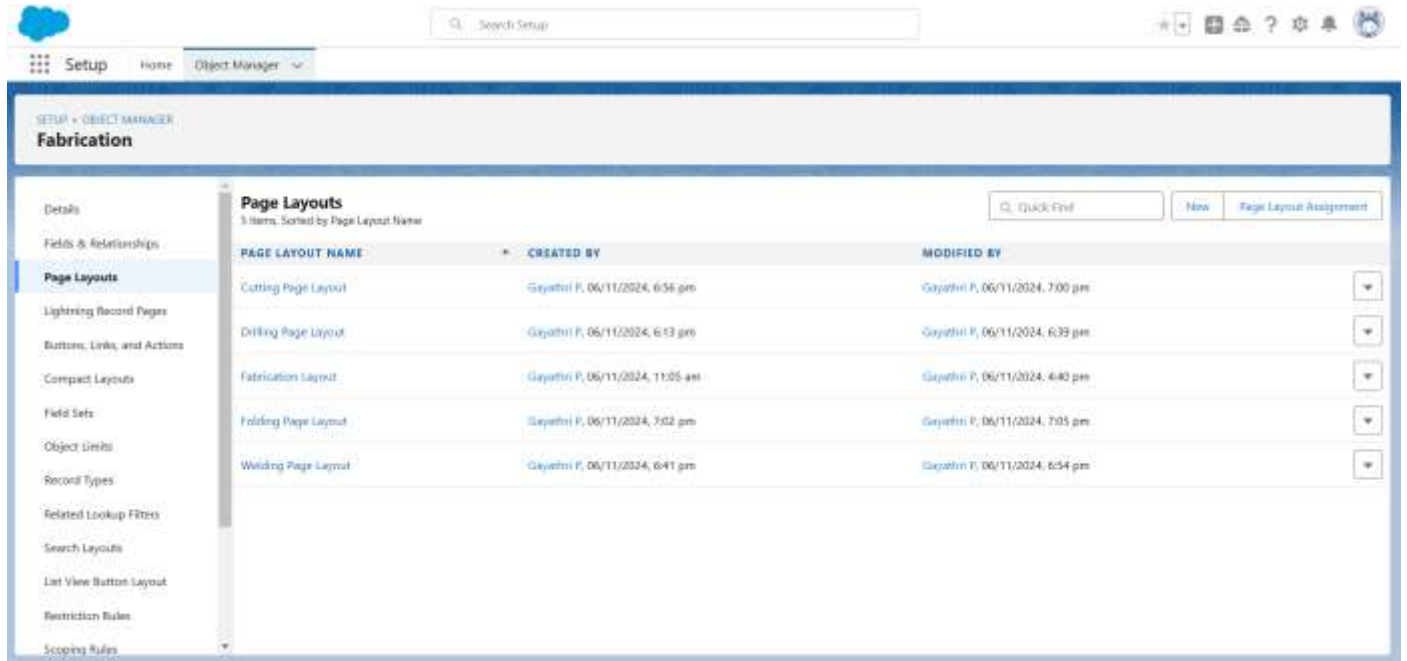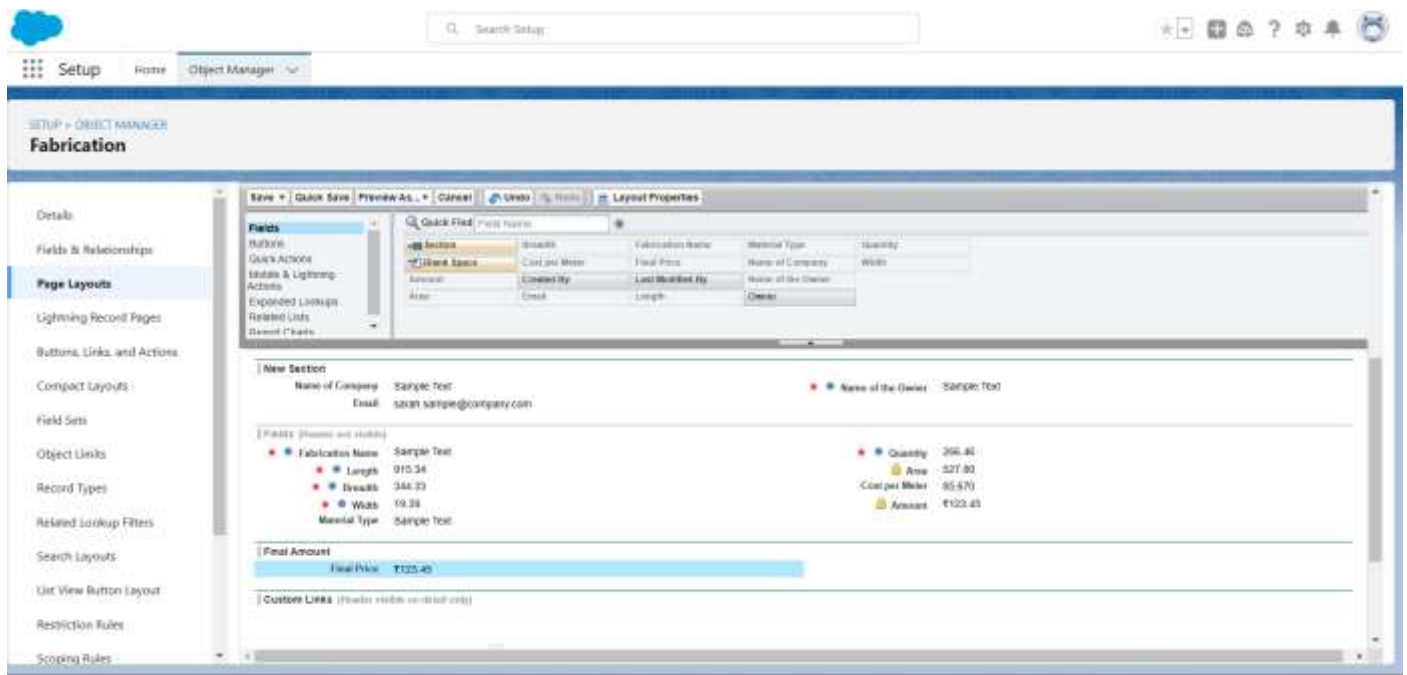
Milestone 7: Creation of Record Types
For the Fabrication Object we have to create 4 Record Types (Drilling, Welding, Cutting, Folding)
To create a Record Types in Fabrication Object
Go to the setup page >> click on object manager >> From drop down click edit for Fabrication object.

Click on the Record Types >> click New.

Enter the details : For Record Types

Existing Record Types : Master

Record Type Label : Drilling

Record Type Name : Drilling

Active : Tick checkbox

Click on Next

In Assign Page Layout

Apply one layout to all profiles : Select Drilling Page Layout

Click on Save

Similarly, Create the Record Types on Welding Page Layout, Cutting Page Layout and Folding Page Layout

Setup   Home   Object Manager ∨

SETUP • OBJECT MANAGER
Fabrication

Details	New Record Type
Fields & Relationships	**Fabrication**
Page Layouts	
Lightning Record Pages	**Step 1. Enter the details**
Buttons, Links, and Actions	Enter a name and description for the new record type. The new record type will include all the picklist values from the existing record type selected below. After saving the new record type, you will be able to customize the picklist values.
Compact Layouts	**Record Type**
Field Sets	
Object Limits	
Record Types	
Related Lookup Filters	
Search Layouts	
List View Button Layout	
Restriction Rules	
Scoping Rules	

Record Type
Existing Record Type -- Master -- ∨
Record Type Label Cutting
Record Type Name Cutting
Description
Active ☑

Select Make Available to give users assigned to this profile the ability to create and clone records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select Make Default. Users assigned to this record type can still view and edit records associated with record types not available for their profiles.

Profile Name	Record Types Currently Available	☐ Make Available	Make Default
Analytics Cloud Integration User	Drilling (Default)	☐	○
Analytics Cloud Security User	Drilling (Default)	☐	○

Setup   Home   Object Manager ∨

SETUP • OBJECT MANAGER
Fabrication

Details	New Record Type
Fields & Relationships	**Fabrication**
Page Layouts	**Step 1. Enter the details**
Lightning Record Pages	Enter a name and description for the new record type. The new record type will include all the picklist values from the existing record type selected below. After saving the new record type, you will be able to customize the picklist values.
Buttons, Links, and Actions	**Record Type**
Compact Layouts	
Field Sets	
Object Limits	
Record Types	
Related Lookup Filters	
Search Layouts	
List View Button Layout	
Restriction Rules	
Scoping Rules	

Record Type
Existing Record Type -- Master -- ∨
Record Type Label Folding
Record Type Name Folding
Description
Active ☑

Select Make Available to give users assigned to this profile the ability to create and clone records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select Make Default. Users assigned to this record type can still view and edit records associated with record types not available for their profiles.

Profile Name	Record Types Currently Available	☐ Make Available	Make Default
Analytics Cloud Integration User	Drilling (Default)	☐	○
Analytics Cloud Security User	Drilling (Default)	☐	○

Milestone 8: Validation rule:

Task1:
To create a validation rule to an Fabrication Object
Go to the setup page >> click on object manager >> From drop down click edit for Fabrication object.

Click on the validation rule >> click New.
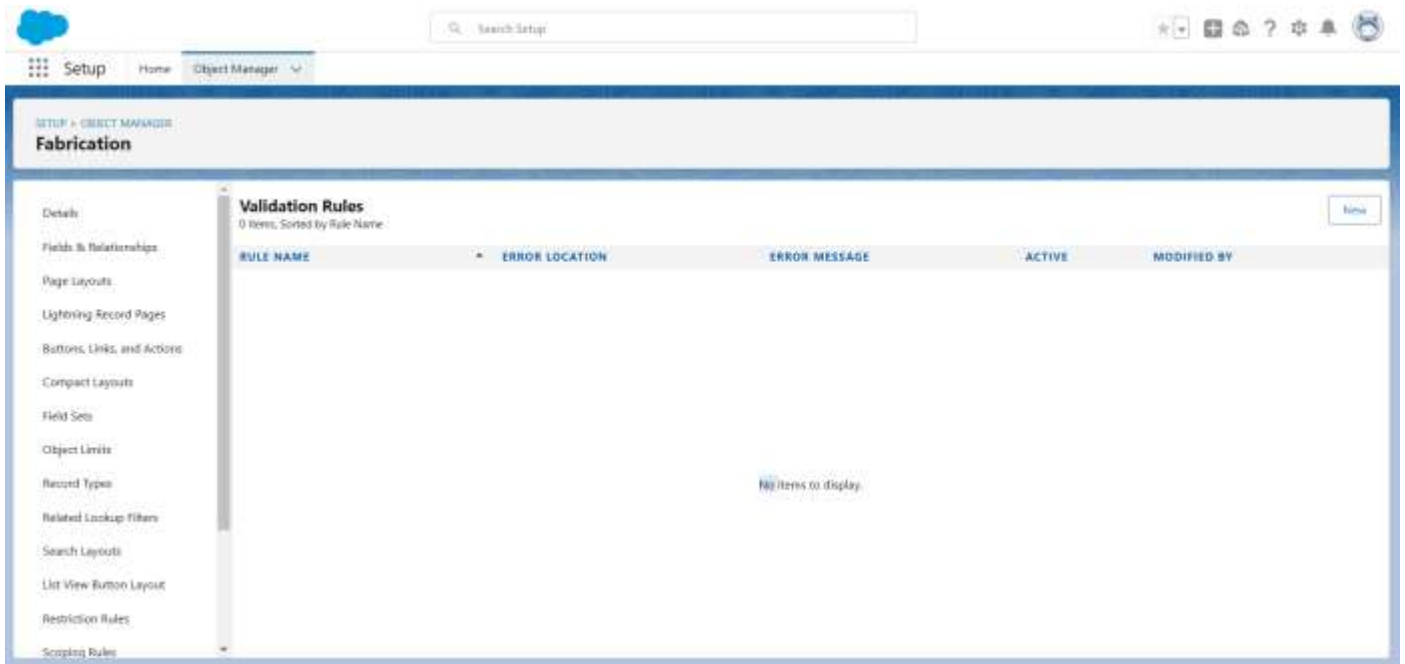
3. Enter the Rule name as "Rule_for_fabrication".

4. Insert the Error Condition Formula as :
OR(Length__c == 0, Breadth__c == 0, Width__c ==0, Quantity == 0)
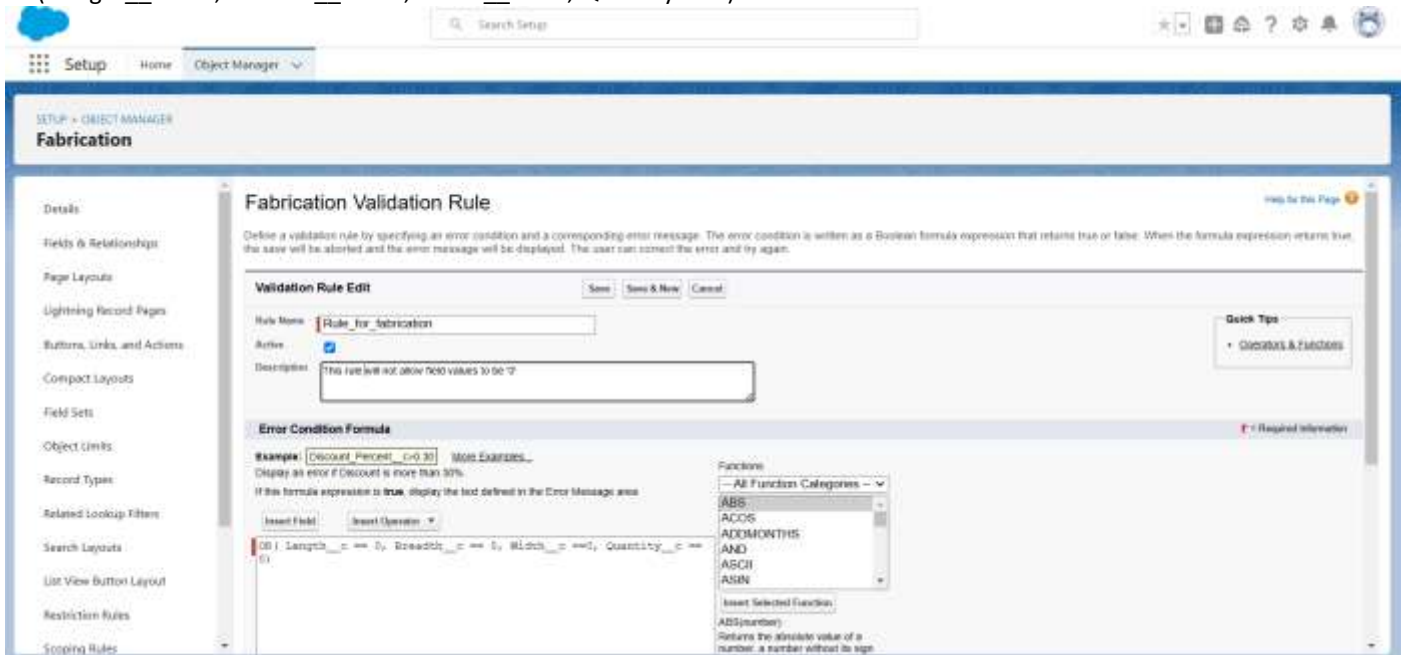
4. Enter the Error Message as "Length, Breadth, Width and Quantity Values should not be zero", select the Error location as Top of Page and click Save.

Create the Validation Rule for Shed-Work and Pipe Lining Object Similarly by following the Activity 1 Steps.

SETUP
Object Manager
1 Items, Sorted by Label

Q pipe   Schema Builder   Create ▼

LABEL ▲	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED	
Pipe Lining	Pipe_Lining_c	Custom Object		06/11/2024	✓	▼

SETUP > OBJECT MANAGER
Pipe Lining

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

Validation Rules
0 Items, Sorted by Rule Name

New

RULE NAME ▲	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY

No items to display.

SETUP > OBJECT MANAGER
Pipe Lining

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

Pipe Lining Validation Rule

Help for this Page

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

Validation Rule Edit   Save   Save & New   Cancel

Rule Name   Rule_for_Pipe_Lining
Active   ☑
Description

Quick Tips
• Operators & Functions

Error Condition Formula

† = Required Information

Example: Discount_Percent__c > 0.30   More Examples...
Display an error if Discount is more than 30%
If this formula expression is **true**, display the text defined in the Error Message area

Insert Field   Insert Operator ▼

OR(Diameter__c == 0, Height__c == 0, Width__c ==0, Quantity__c == 0)

Functions
-- All Function Categories -- ∨

CASESAFEID
CEILING
CHR
CONTAINS
COS
CURRENCYRATE

Insert Selected Function

ABS(number)
Returns the absolute value of a number, a number without its sign

Milestone 9 : Email Templates
Upload Logo into Salesforce
Go to the setup page >> In quick find box search for Salesforce Branding >> Click on Edit.
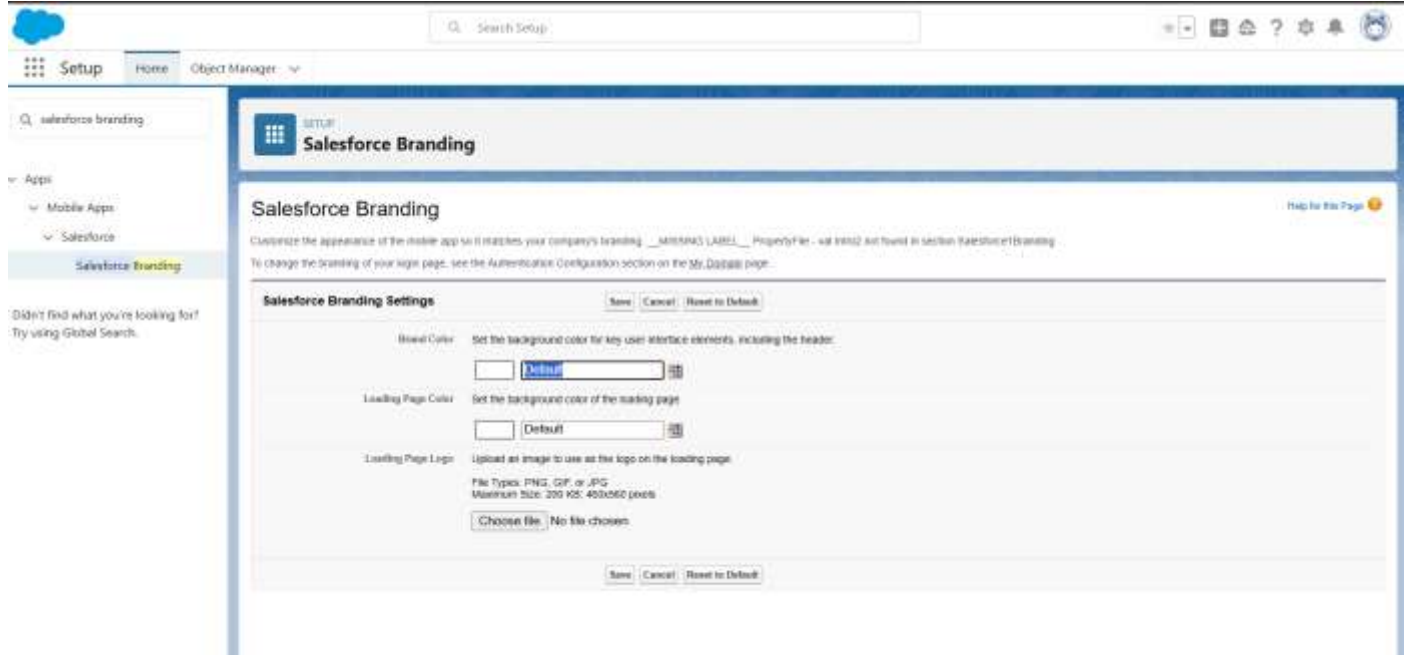
In Loading Page Logo >> Choose File >> Select the image and click open >> Click on Save.
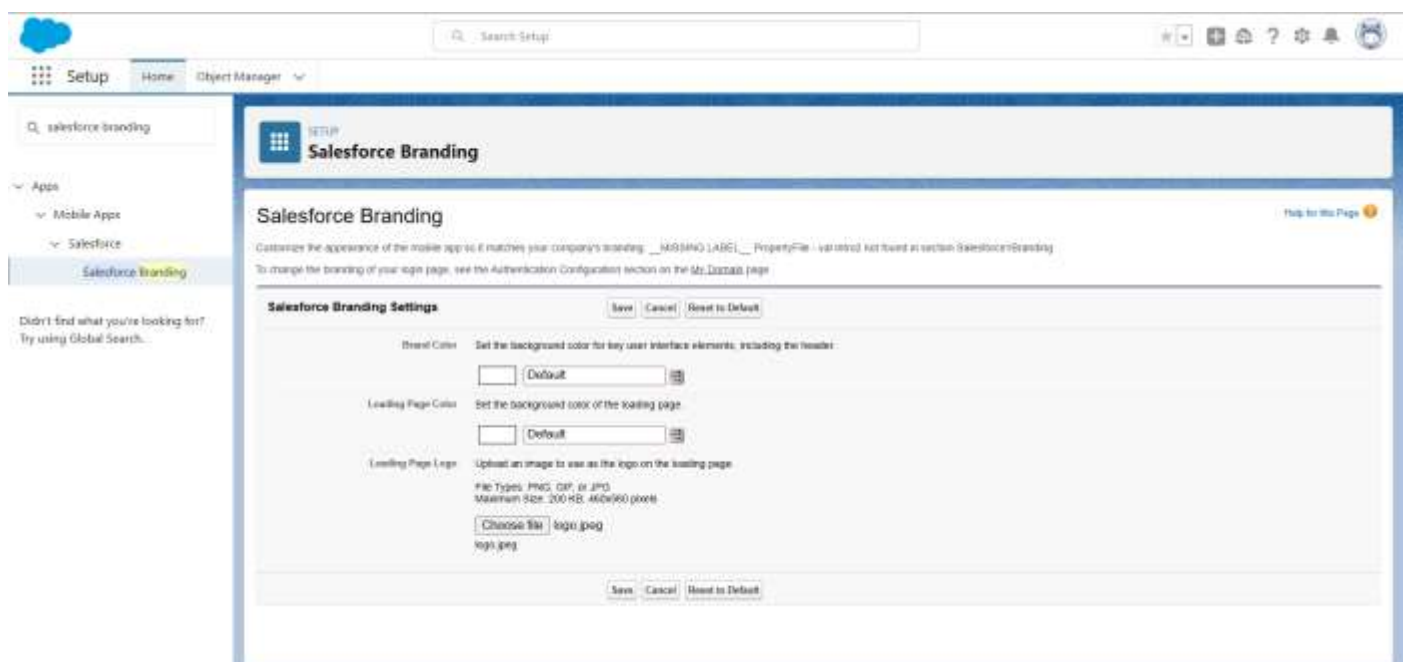
Creation of Letterhead for Email purpose.
Go to the setup page >> In quick find box search for Classic Letterheads >> Click on New Letterhead.

Check Available for use box.

Letterhead Label : Letterhead for Email Purpose

Letterhead Unique Name : Auto-populated
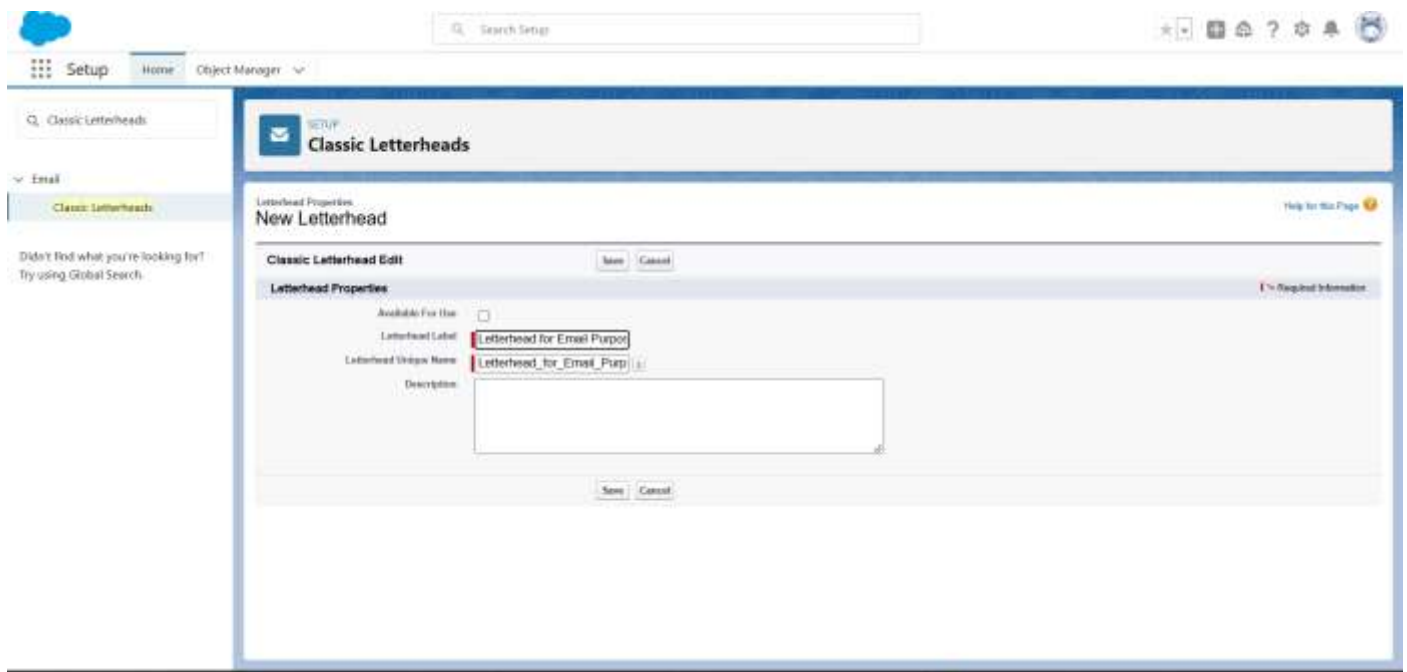
Click on Save >> Now click on Letterhead for Email Purpose then Edit Letterhead.
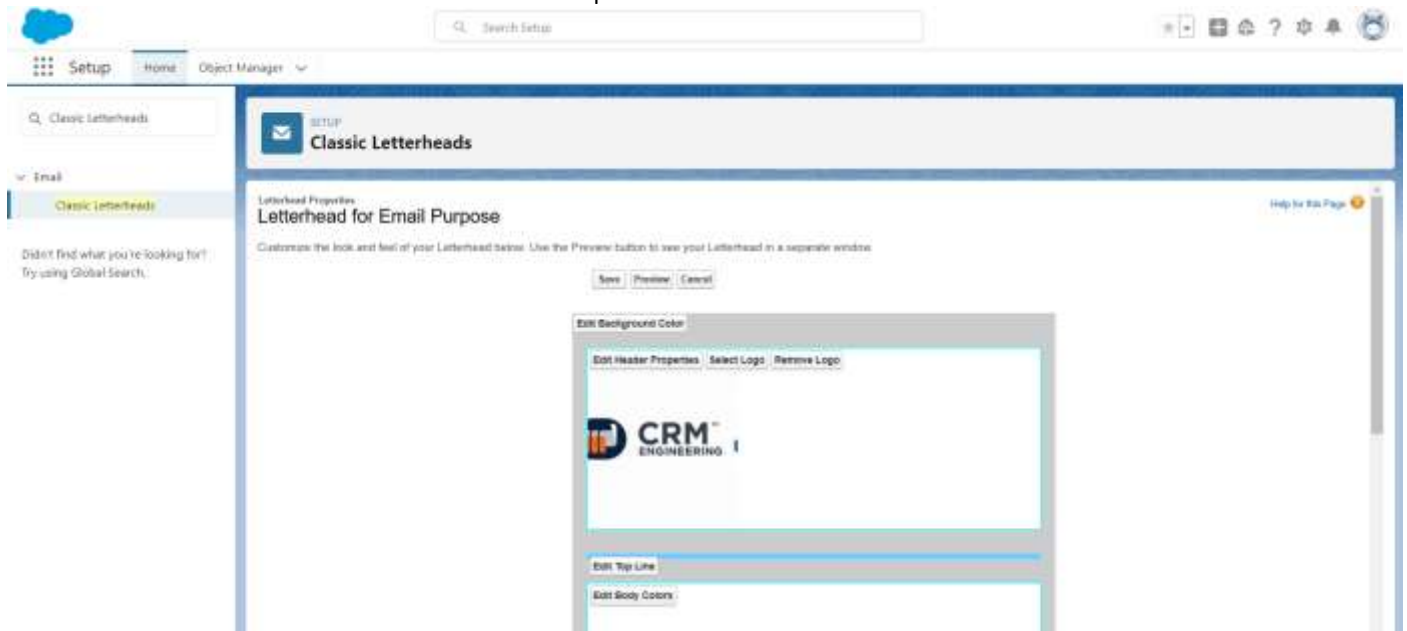
Click on select logo >> Now select the logo and click save.

Task-3:
Create Email Template.
To create Email Template:

1. Go to setup in quick find box enter email template >> click on classic Email Template.

2. Click on >> New Email Template====>HTML (using Classic Letterhead)

   Folder : Unfiled public Classic Email templates
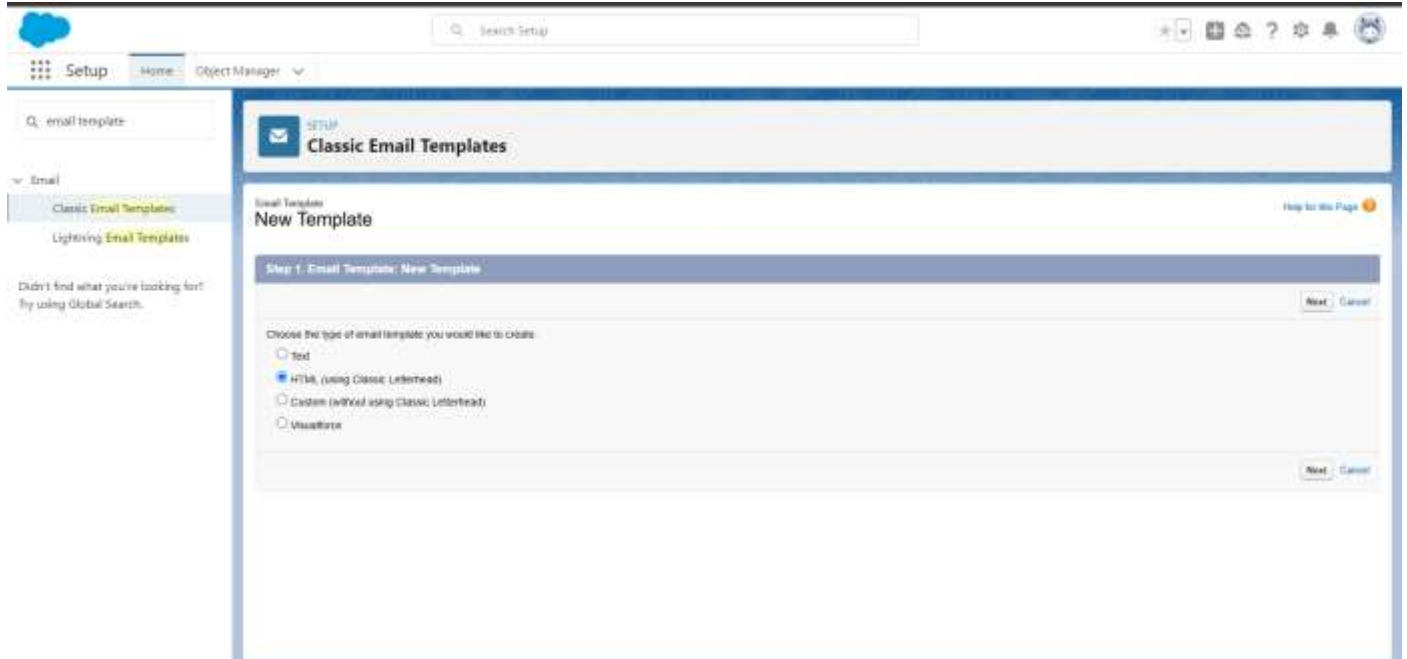
Click on available for use

3. Email Template Name is "Bill Template"

4. Template Unique Name : Auto populated

5. Subject : "Fabrication Template"
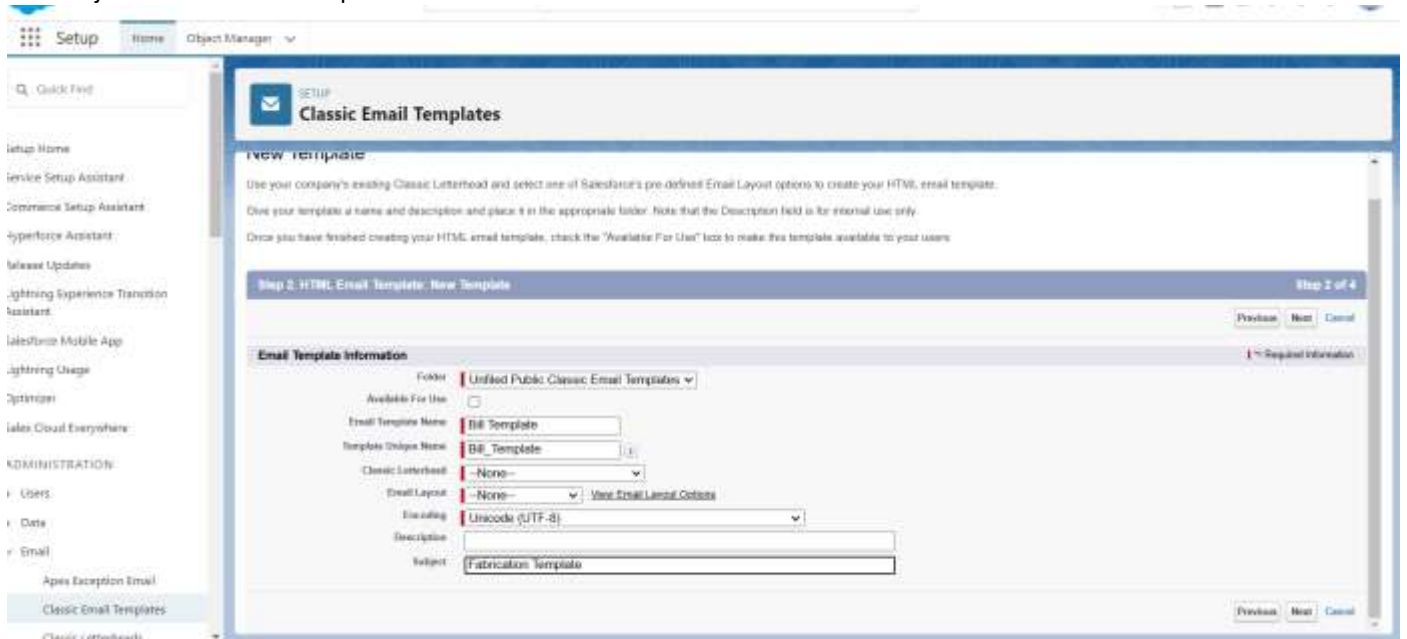
6. Email body :

Hello
{!Fabrication__c.Name_of_the_Owner__c}{!Shed_Work__c.Name_of_the_Owner__c}{!Pipe_Lining__c.Name_of_Owner__c} ,

I hope everything is going well in {!Fabrication__c.Name_of_Company__c}
{!Shed_Work__c.Name_of_Company__c}{!Pipe_Lining__c.Name_of_Company__c} Company. I have been attached the required items for the work to be done. Please verify them.

length = {!Fabrication__c.Length__c}{!Shed_Work__c.Height__c}{!Pipe_Lining__c.Height__c}, breadth = {!Fabrication__c.Length__c}{!Shed_Work__c.Breadth__c}, width = {!Fabrication__c.Width__c}{!Shed_Work__c.Width__c}{!Pipe_Lining__c.Width__c}, area =

{!Fabrication__c.Area__c}{!Shed_Work__c.Area__c}{!Pipe_Lining__c.Area__c}, The Final Price = {!Fabrication__c.price__c}{!Shed_Work__c.Price__c}{!Pipe_Lining__c.Price__c}.

Thanks & Regards,

Engineering Works.

{!Fabrication__c.Area__c}{!Shed_Work__c.Area__c}{!Pipe_Lining__c.Area__c}, The Final Price = {!Fabrication__c.price__c}{!Shed_Work__c.Price__c}{!Pipe_Lining__c.Price__c}.

7. Save

Task-4:

Create Email Alert.

Go to setup in quick find box enter email Alert >> New Email Alert

Description : Email Alert for Fabrication Object

Unique Name : Auto-Populated

Object : Fabrication

Email Template : select the template that is for fabrication Object

Recipients : User: Integration User, User : System Administrator, user : Security User
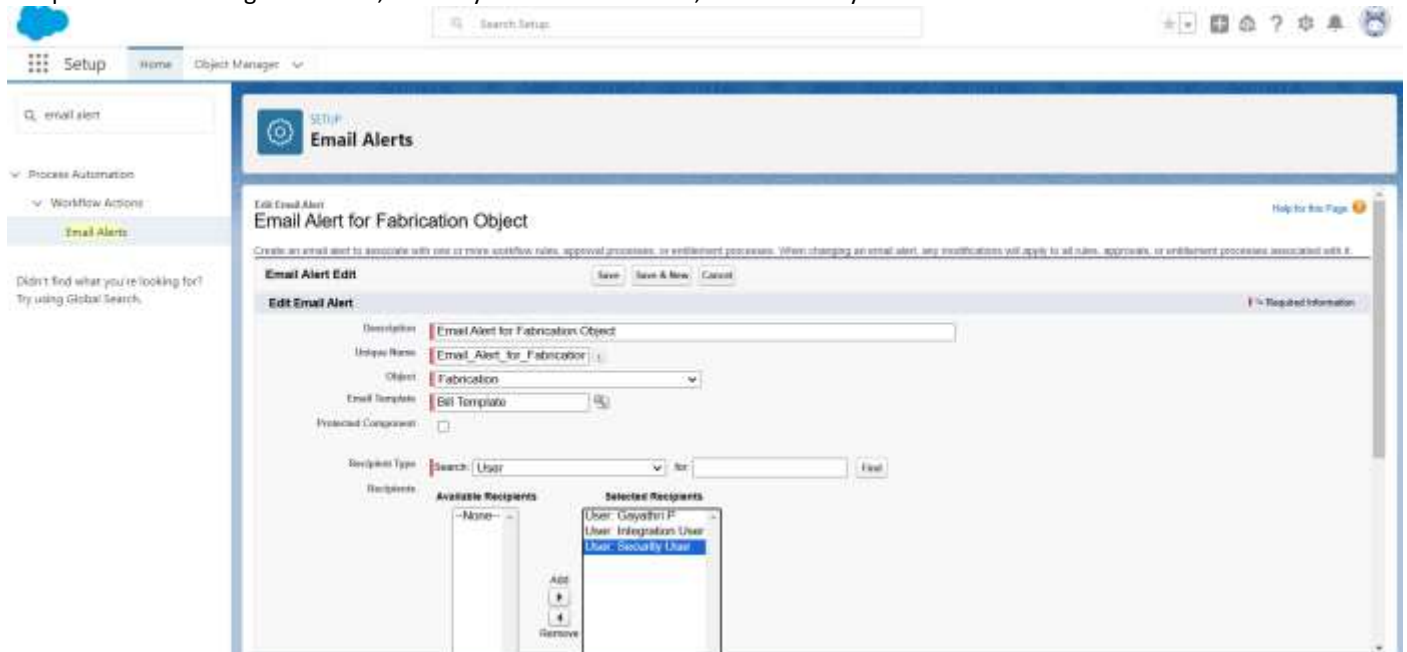
Click Save

Similarly create for Pipe-Lining and Shed-Work objects

Q. email alert

SETUP
Email Alerts

Process Automation
  Workflow Actions
    Email Alerts

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

Edit Email Alert
Email Alert for Pipe Lining Object

Help for this Page

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

Email Alert Edit | Save | Save & New | Cancel

Edit Email Alert

I = Required Information

Description | Email Alert for Pipe Lining Object
Unique Name | Email_Alert_for_Fabrication i
Object | Pipe Lining ∨
Email Template | Pipe Lining Template 🔍
Protected Component | ☐

Recipient Type | Search: User ∨ for: [   ] Find
Recipients | **Available Recipients** | **Selected Recipients**
--None-- | User: Gayathri P
| User: Integration User
| User: Security User

Add ▶
◀ Remove

Q. email alert

SETUP
Email Alerts

Process Automation
  Workflow Actions
    Email Alerts

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

Edit Email Alert
Email Alert for Shed Work Object

Help for this Page

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

Email Alert Edit | Save | Save & New | Cancel

Edit Email Alert

I = Required Information

Description | Email Alert for Shed Work Object
Unique Name | Email_Alert_for_Fabrication i
Object | Shed-Work ∨
Email Template | Shed work Template 🔍
Protected Component | ☐

Recipient Type | Search: User ∨ for: [   ] Find
Recipients | **Available Recipients** | **Selected Recipients**
--None-- | User: Gayathri P
| User: Integration User
| User: Security User

Add ▶
◀ Remove

Q. email alert

SETUP
Email Alerts

Process Automation
  Workflow Actions
    Email Alerts

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

All Email Alerts

Help for this Page

Email alerts are used to send emails from a flow or other automation.

View: All Email Alerts ∨ Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New Email Alert

Action	Description ↑	Email Template Name	Object	Last Modified Date
Edit | Del	Email Alert for Fabrication Object	Bill Template	Fabrication	06/11/2024
Edit | Del	Email Alert for Pipe Lining Object	Pipe Lining Template	Pipe Lining	06/11/2024
Edit | Del	Email Alert for Shed Work Object	Shed work Template	Shed-Work	06/11/2024

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Milestone 10 : FLOWS
Task-1:
Create Flow to calculate Final Price on Fabrication Object based on Material Type
Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.
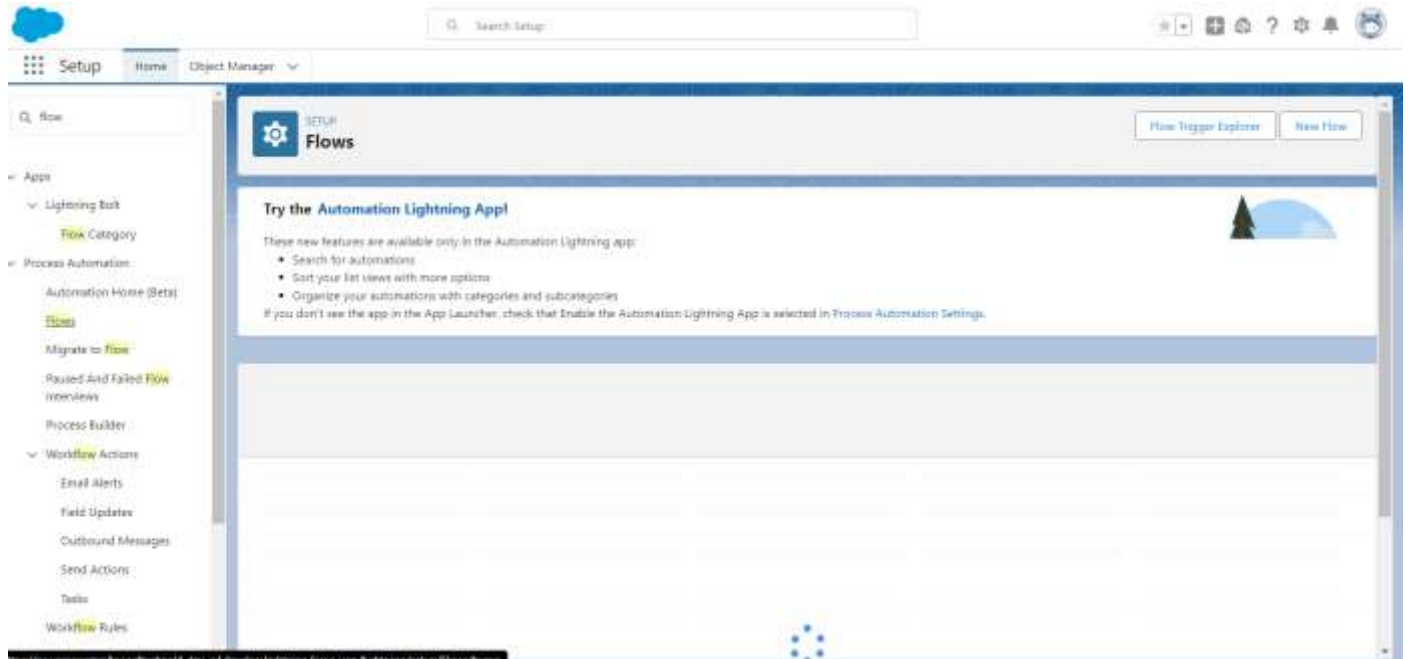
Select the record Triggered flow.Click on create.

Under Object select "Fabrication". Click on A record is created or updated.

Set Entry Conditions : None

Select Actions and Related Records

Under record trigger flow click on "+" icon and select Send Email Alert.

In New Action Select Fabrication Template.

Label : Mail

API Name : Mail

Record ID : {!$Record.Id}

Click Done.

Under record trigger flow click on "+" icon and select Decision

For New Decision :

Label : Material

Api Name : Material

For Outcome Details :

Label : Iron Material

Outcome API Name : Iron_Material

Condition Requirements to Execute Outcome : Condition Requirements to Execute Outcome

Resource : {!$Record.Material_Type__c}

Operator : Equals

Value : Iron

In the Outcome Order click '+' Icon and create another four outcomes for Aluminum, Metal, Wood, Steel(for each outcome keep the respective value)

For Aluminum >> Value : Aluminum

For Metal >> Value : Metal

For Wood >> Value : Wood

For Steel >> Value : Steel
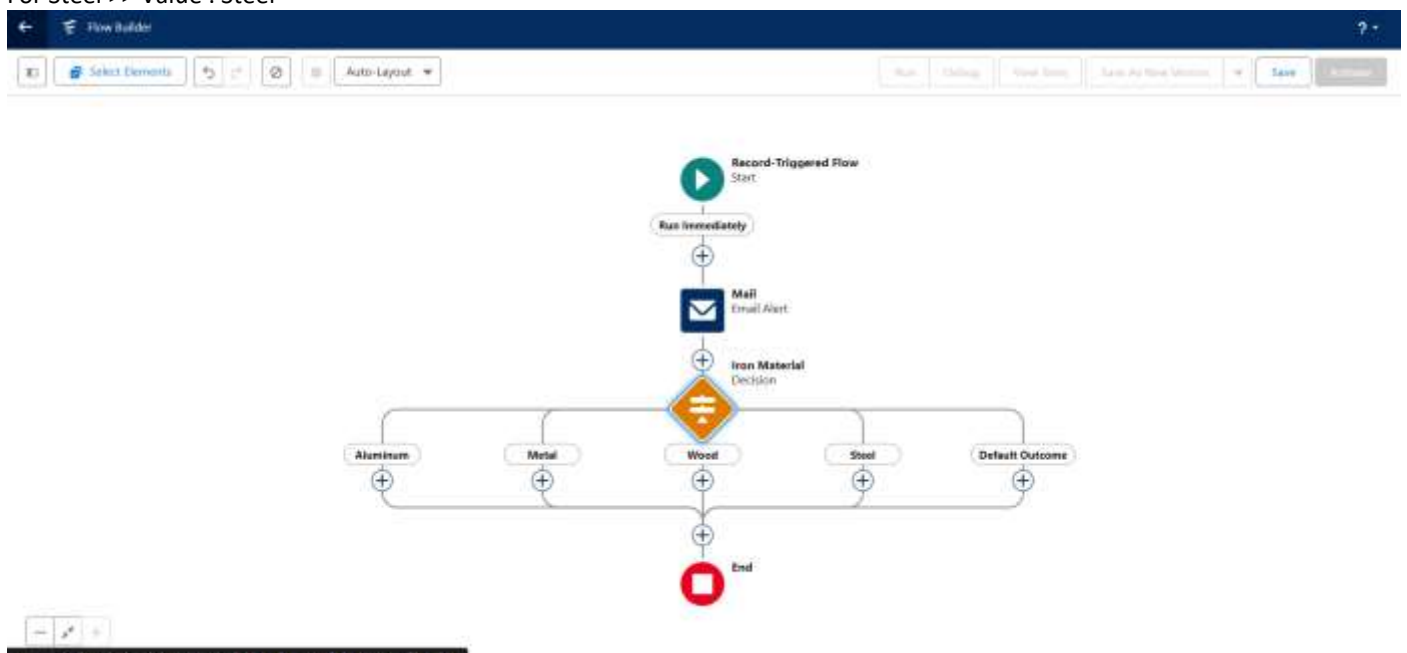
The Outcome Details will be seen like below :

Under Iron Material click on "+" icon and select Update Related Record.

Label : For Iron

API Name : For_Iron

How to Find Records to Update and Set Their Value : Select Use the fabrication record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

In Resource Type : Select Formula

API Name : IronCost

Data Type : Number

Decimal Places : 2

Formula : {!$Record.Amount__c} * 2
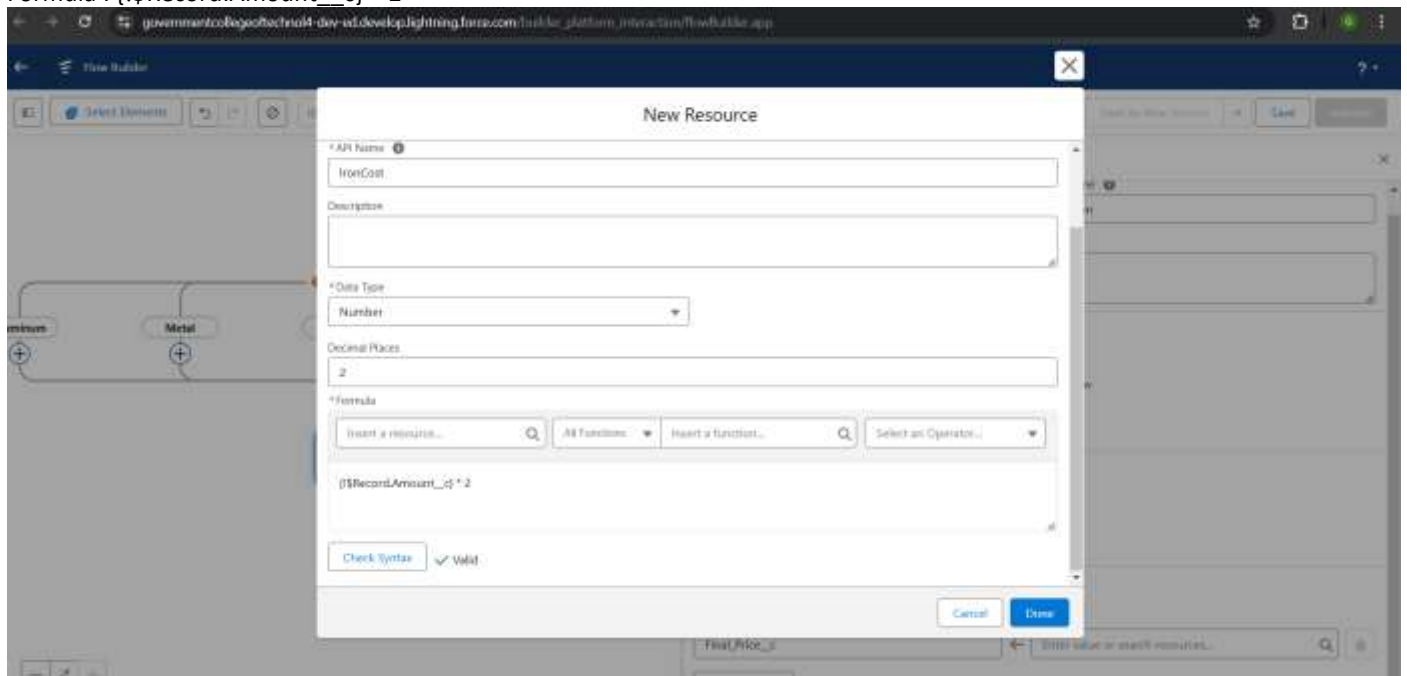
Click Done

After clicking Done, it would look like
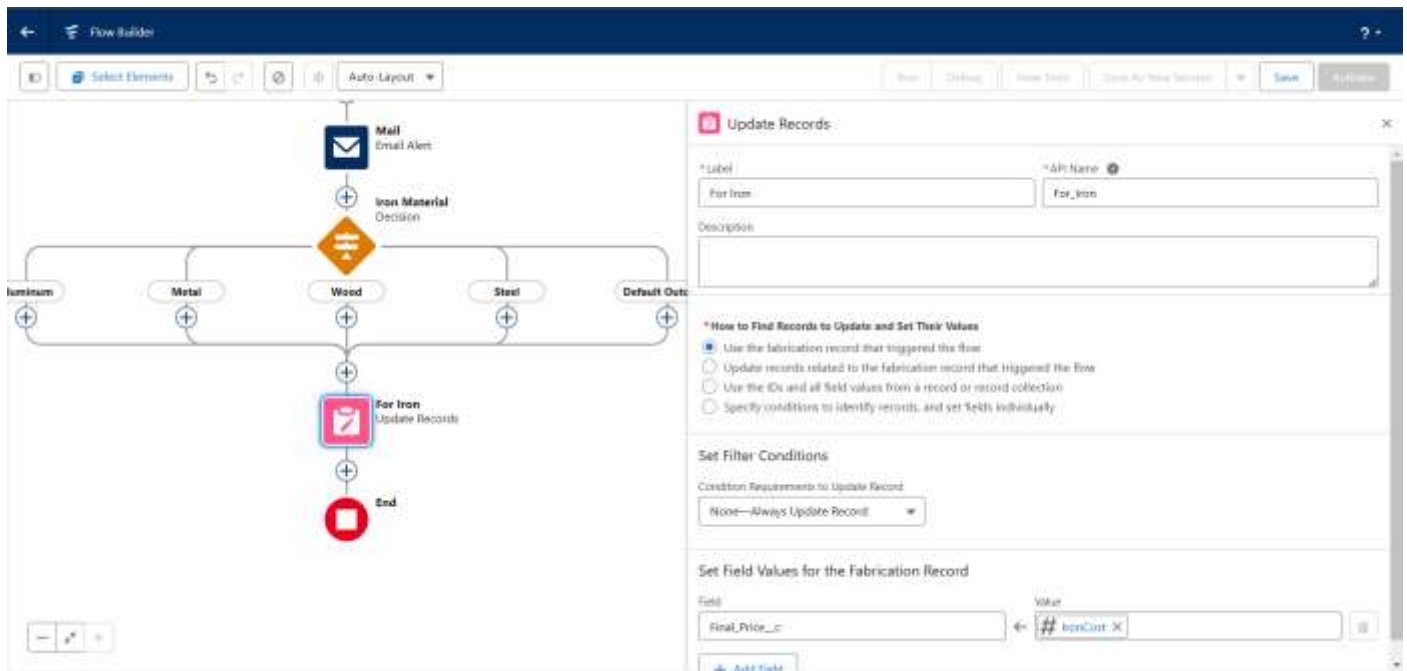
Under Aluminum Material click on "+" icon and select Update Related Record.

Label : For Aluminum

API Name : For_Aluminum

How to Find Records to Update and Set Their Value : Select Use the fabrication record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

In Resource Type : Select Formula

API Name : AluminumCost

Data Type : Number

Decimal Places : 2

Formula : {!$Record.Amount__c} * 1.8

Click Done

Under Metal Material click on "+" icon and select Update Related Record.

Label : For Metal

API Name : For_Metal

How to Find Records to Update and Set Their Value : Select Use the fabrication record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

In Resource Type : Select Formula

API Name : MetalCost

Data Type : Number

Decimal Places : 2

Formula : {!$Record.Amount__c} * 1.6

Click Done

Under WoodMaterial click on "+" icon and select Update Related Record.

Label : For Wood

API Name : For_Wood

How to Find Records to Update and Set Their Value : Select Use the fabrication record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

In Resource Type : Select Formula

API Name : WoodCost

Data Type : Number

Decimal Places : 2

Formula : {!$Record.Amount__c} * 1.4

Click Done

Under Steel Material click on "+" icon and select Update Related Record.

Label : For Steel

API Name : For_Steel

How to Find Records to Update and Set Their Value : Select Use the fabrication record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

In Resource Type : Select Formula

API Name : SteelCost

Data Type : Number

Decimal Places : 2

Formula : {!$Record.Amount__c} * 1.2

Click Done
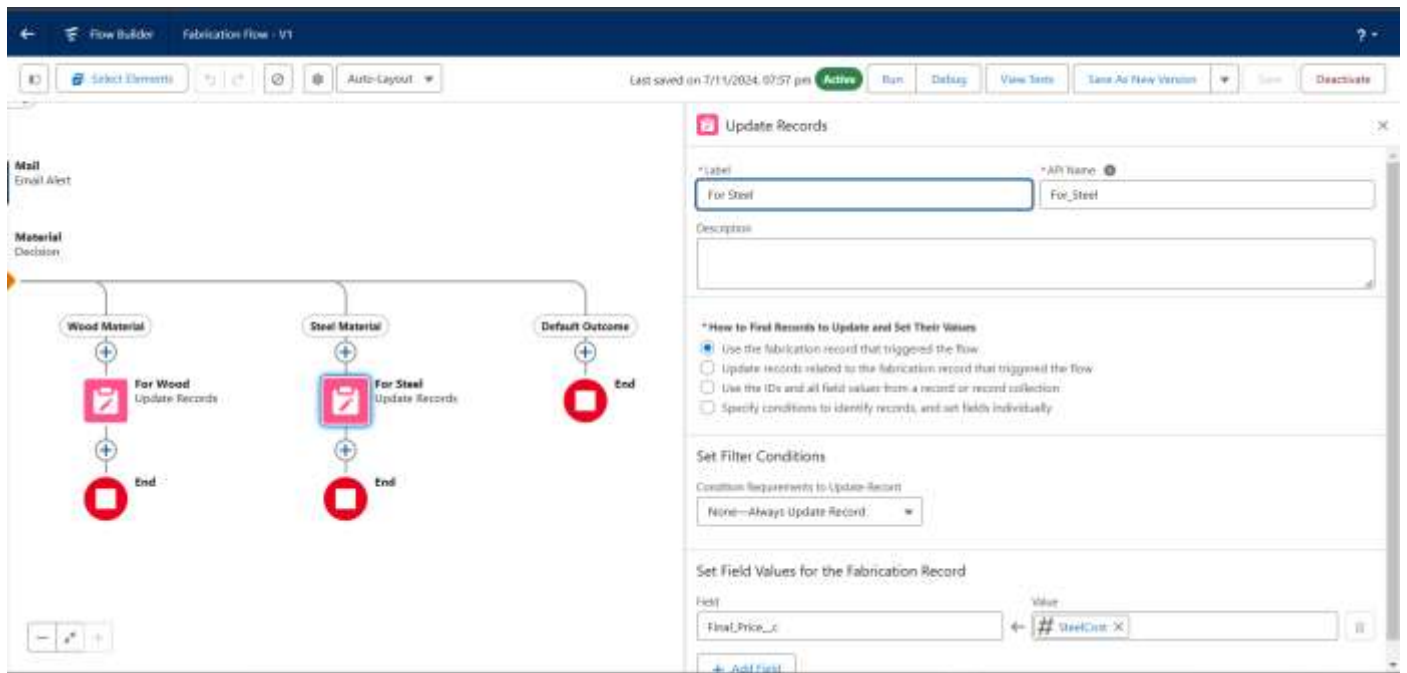
Click on Save

Flow Label : Fabrication Flow

Flow API Name : Fabrication_Flow

Click Save and then active

The Flow will like this :
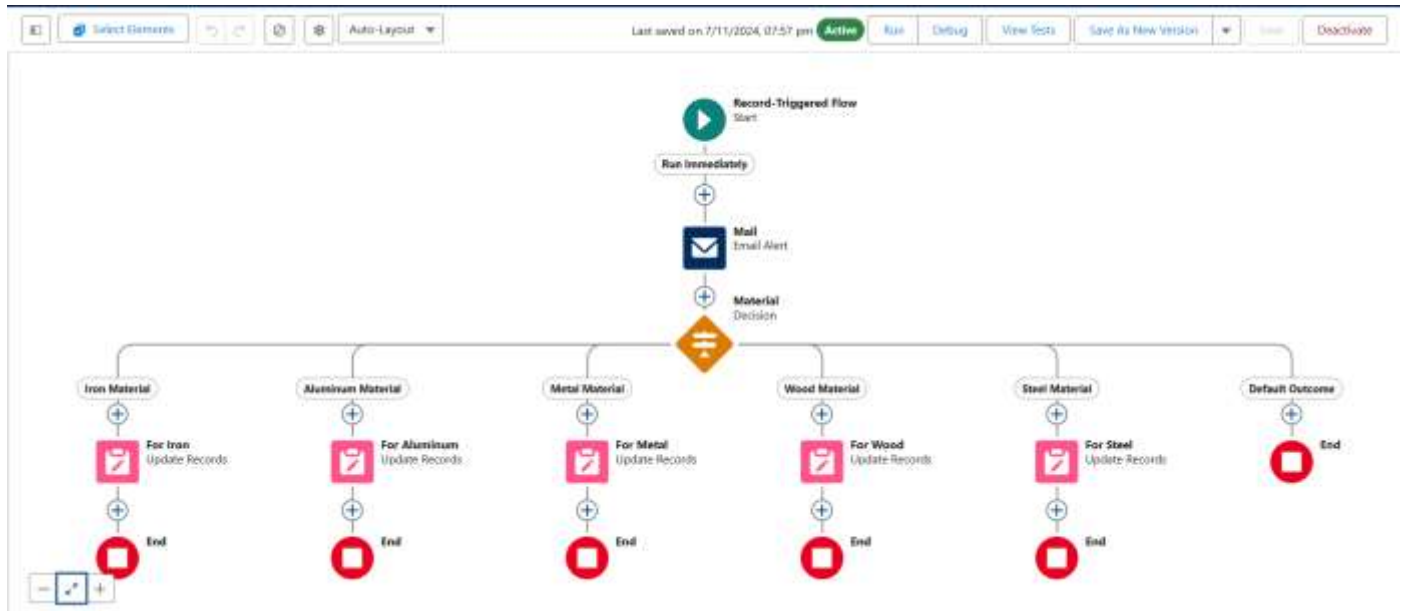
Create Flow to calculate Final Price on Shed Work Object based on Material Type
Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.

Select the record Triggered flow.Click on create.

Under Object select "Shed Work". Click on A record is created or updated.
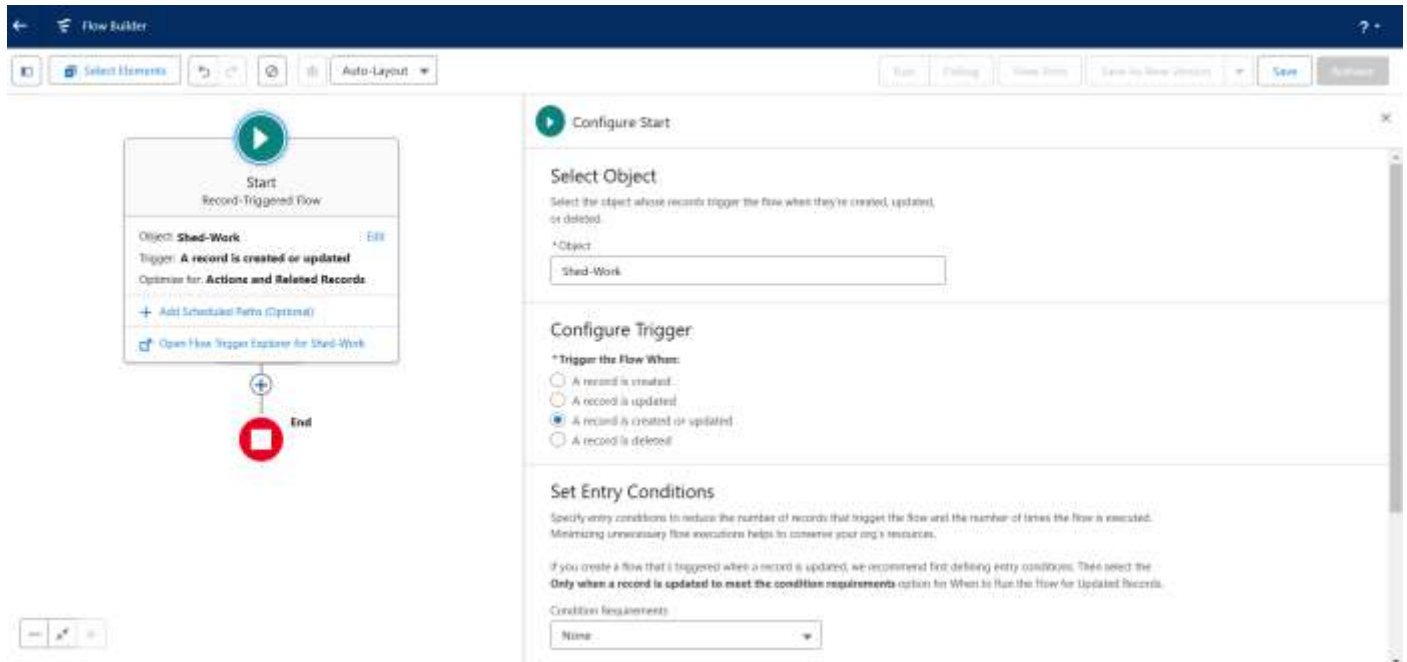
Set Entry Conditions : None

Select Actions and Related Records

Under record trigger flow click on "+" icon and select Send Email Alert.

In New Action Select Fabrication Template.

Label : Mail

API Name : Mail

Record ID : {!$Record.Id}

Click Done.

Under record trigger flow click on "+" icon and select Decision

For New Decision :

Label : Material

Api Name : Material

For Outcome Details :

Label : Iron Material

Outcome API Name : Iron_Material

Condition Requirements to Execute Outcome : Condition Requirements to Execute Outcome

Resource : {!$Record.Material_Type__c}

Operator : Equals

Value : Iron

In the Outcome Order click '+' Icon and create another four outcomes for Metal1, Steel(for each outcome keep the respective value)

For Metal1 >> Value : Metal

For Steel >> Value : Steel
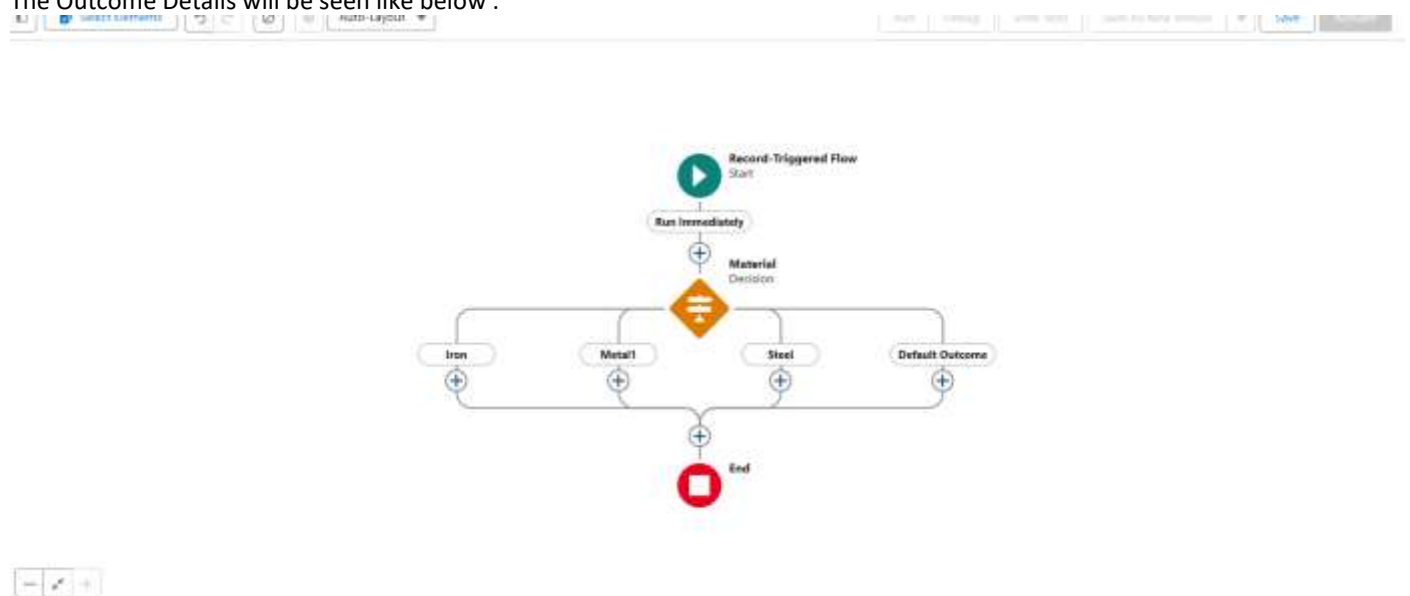
The Outcome Details will be seen like below :

Under Iron Material click on "+" icon and select Update Related Record.

Label : For Iron

API Name : For_Iron

How to Find Records to Update and Set Their Value : Select Use the Shed-Work record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

In Resource Type : Select Formula

API Name : IronCost

Data Type : Number

Decimal Places : 2

Formula : {!$Record.Amount__c} * 2

Click Done

After clicking Done, it would look like

Under Metal1 Material click on "+" icon and select Update Related Record.

Label : For Metal1

API Name : For_Metal1

How to Find Records to Update and Set Their Value : Select Use the fabrication record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

In Resource Type : Select Formula

API Name : Metal1_Cost

Data Type : Number

Decimal Places : 2

Formula : {!$Record.Amount__c} * 1.8

Click Done

Under Steel Material click on "+" icon and select Update Related Record.

Label : For Steel

API Name : For_Steel

How to Find Records to Update and Set Their Value : Select Use the fabrication record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

In Resource Type : Select Formula

API Name : SteelCost

Data Type : Number

Decimal Places : 2

Formula : {!$Record.Amount__c} * 1.5

Click Done
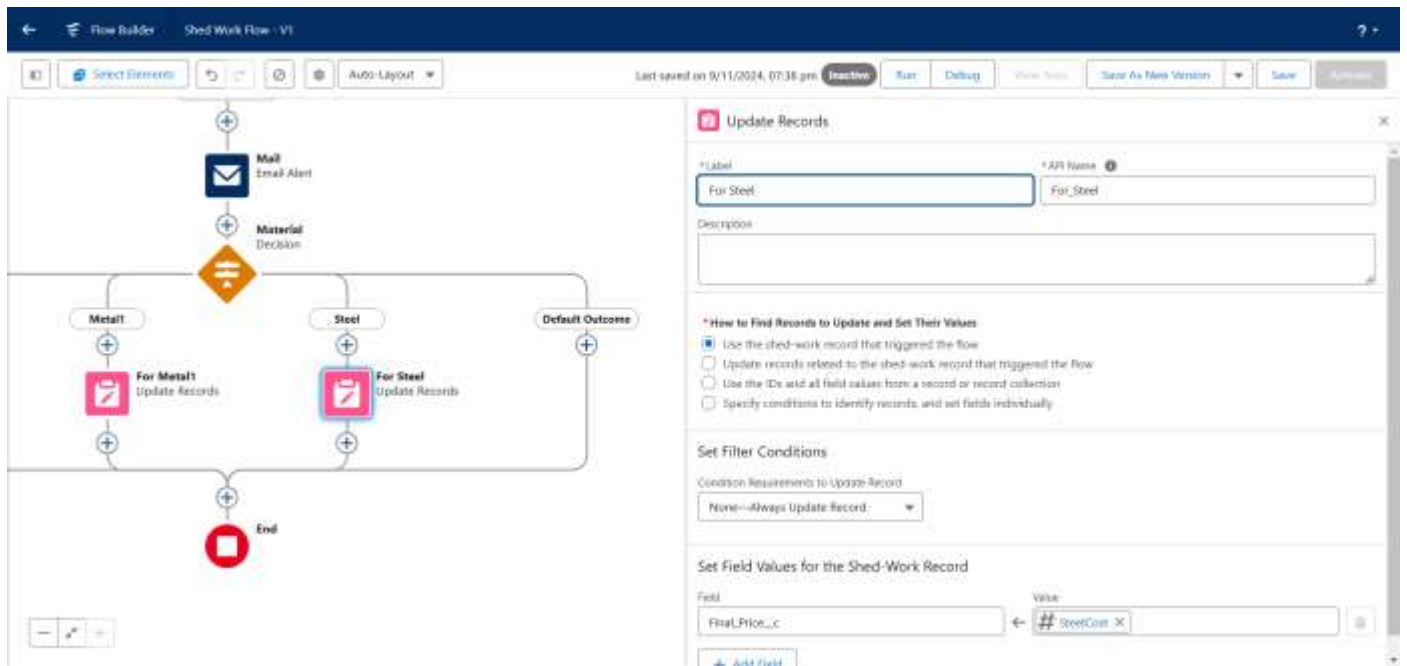
The flow for rods has been completed in shed-work. Now, lets write the flow for sheet of the shed based on material type

Click the '+' Icon which is between decision and Email alert then select select Decision

For New Decision :

Label : Sheet Material

Api Name : Sheet_Material

For Outcome Details :

Label : Metal2 Material

Outcome API Name : Metal2_Material

Condition Requirements to Execute Outcome : Condition Requirements to Execute Outcome

Resource : {!$Record.Material_Type__c}

Operator : Equals

Value : Metals

In the Outcome Order click '+' Icon and create another four outcomes for Rubber, Plastic(for each outcome keep the respective value)

For Rubber >> Value : Rubber

For Plastic >> Value : Plastic

The Outcome Details will be seen like below :

Under Iron Material click on "+" icon and select Update Related Record.

Label : For Metal2

API Name : For_Metal2

How to Find Records to Update and Set Their Value : Select Use the Shed Work record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

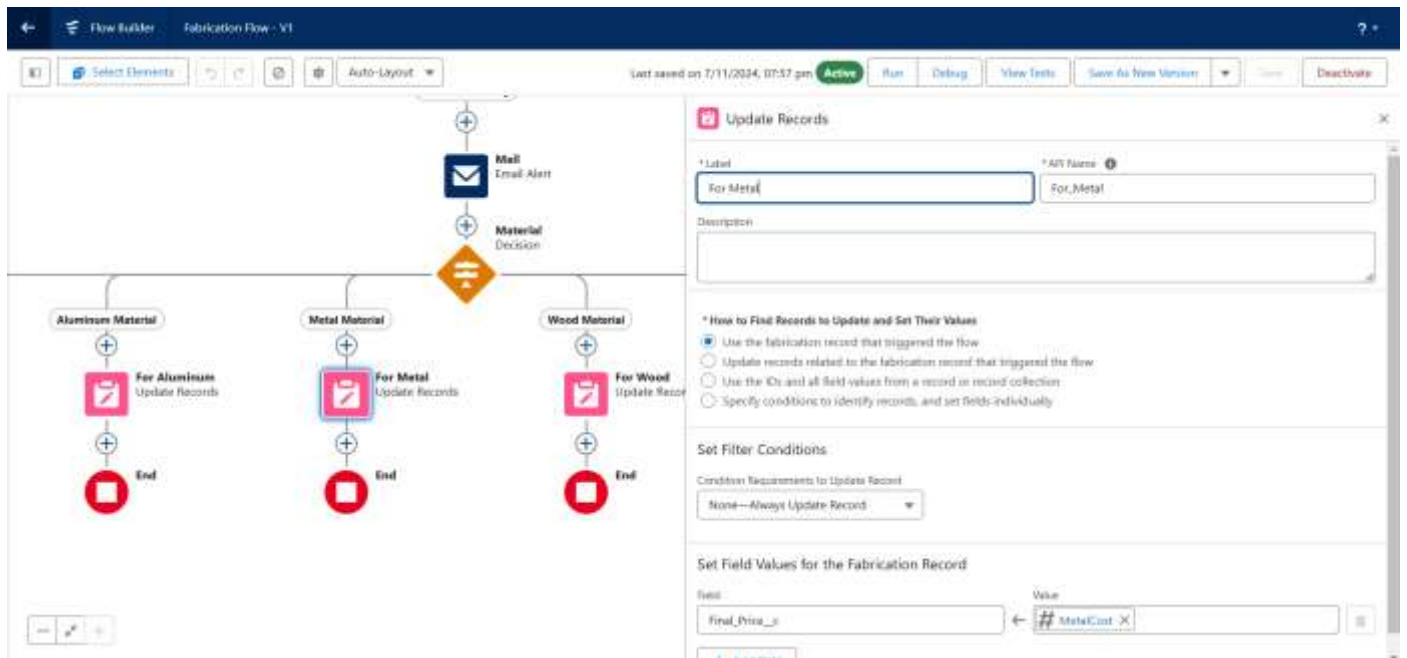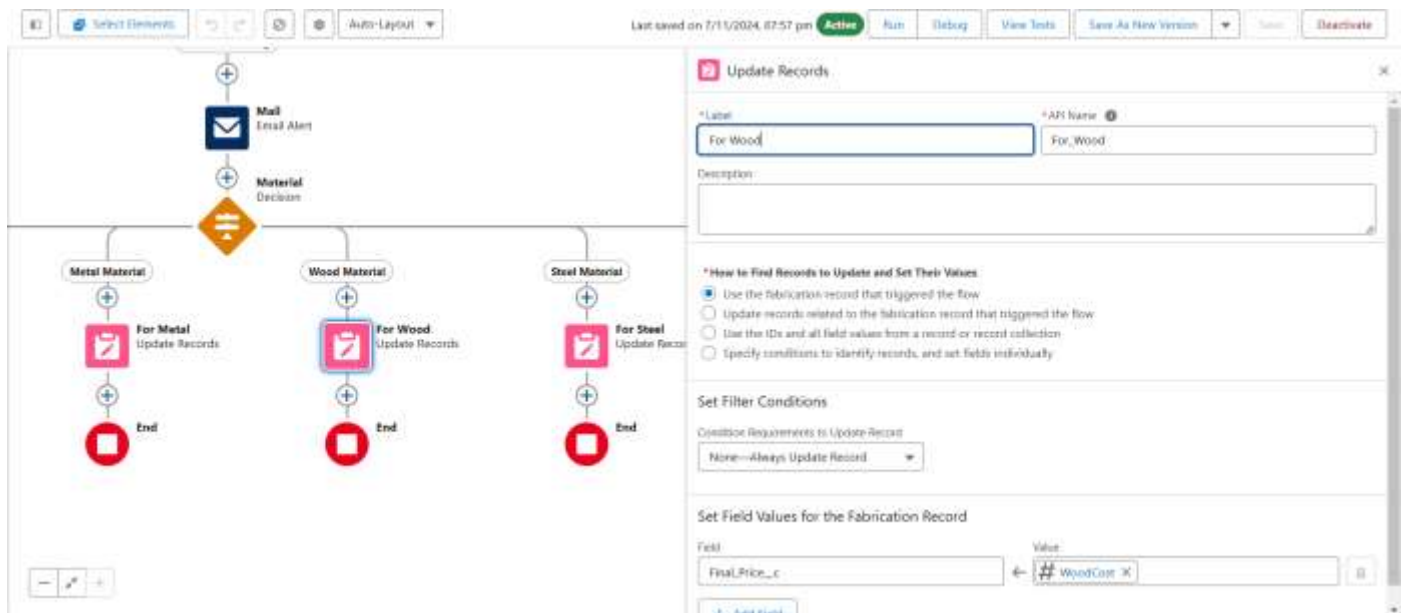In Resource Type : Select Formula

API Name : Metal2Cost

Data Type : Number

Decimal Places : 2

Formula : {!$Record.Amount__c} * 1.8

Click Done

Click Done

Under Rubber Material click on "+" icon and select Update Related Record.

Label : For Rubber

API Name : For_Rubber

How to Find Records to Update and Set Their Value : Select Use the Shed Work record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

In Resource Type : Select Formula

API Name : Rubber_Cost

Data Type : Number

Decimal Places : 2

Formula : {!$Record.Amount__c} * 1.8

Click Done

Under Plastic Material click on "+" icon and select Update Related Record.

Label : For Plastic

API Name : For_Plastic

How to Find Records to Update and Set Their Value : Select Use the Shed Work record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource
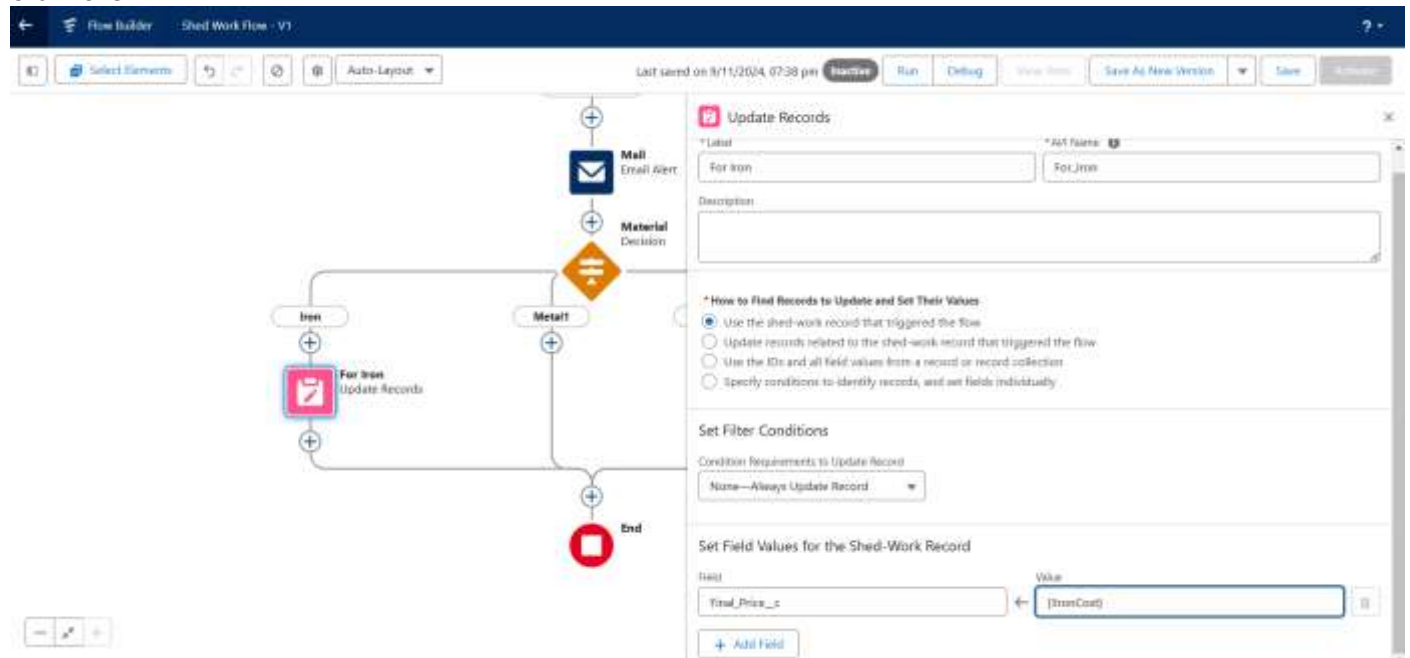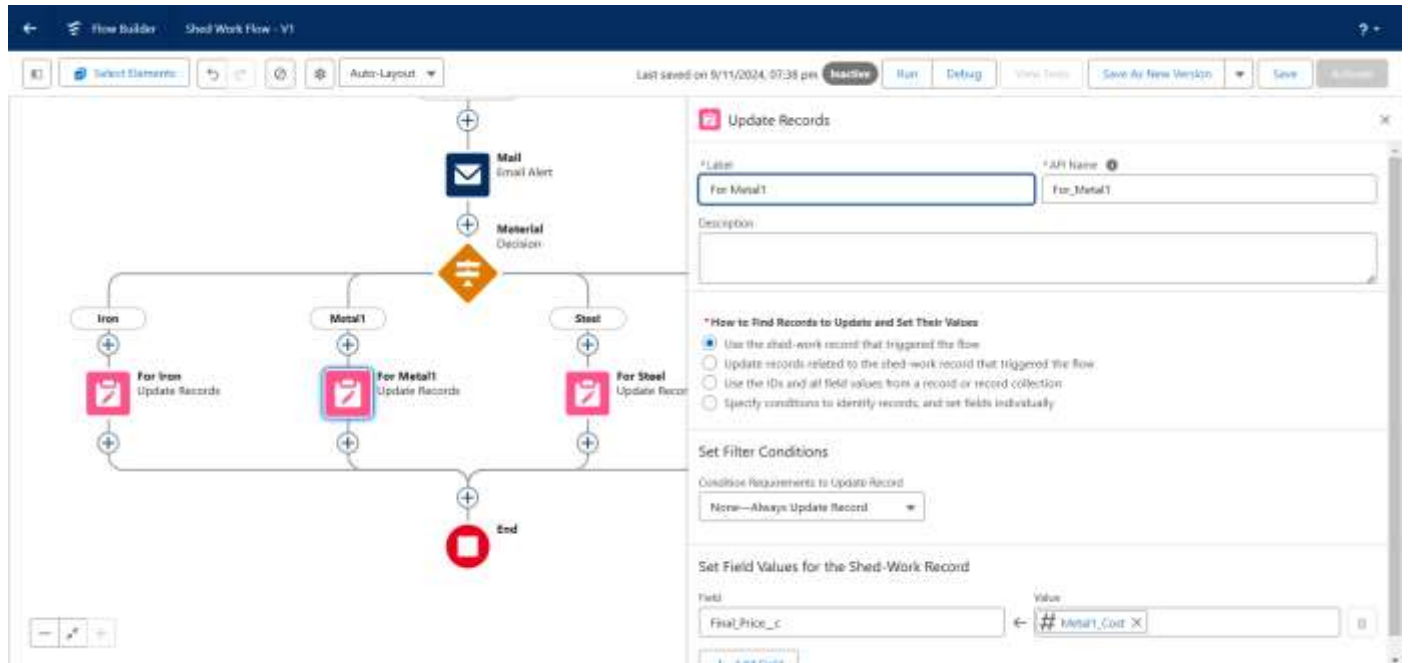
In Resource Type : Select Formula

API Name : PlasticCost

Data Type : Number

Decimal Places : 2

Formula : {!$Record.Amount__c} * 1.5

Click Done
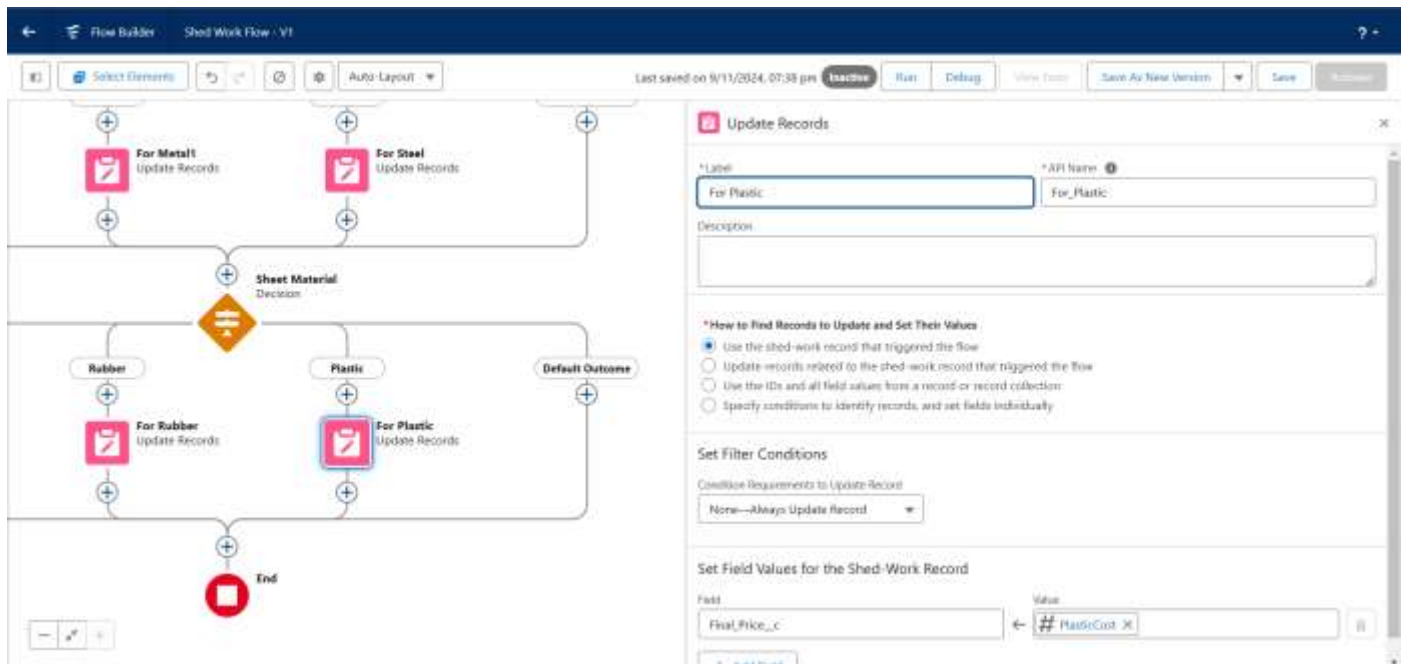
Click on Save

Flow Label : Shed Work Flow

Flow API Name : Shed_Work_Flow

Click Save and then Actiavte
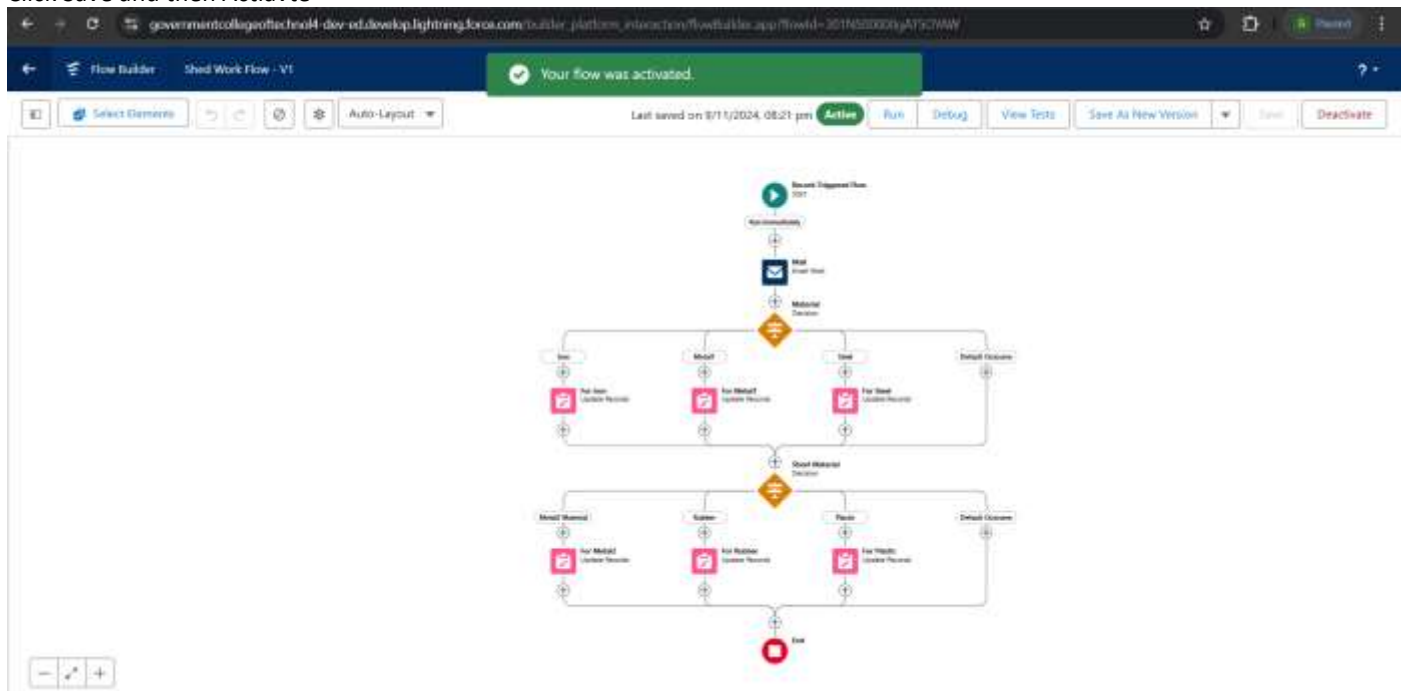
The Shed Work Flow would look like this:

Create Flow to calculate Final Price on Pipe Lining Object based on Material Type
Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.

Select the record Triggered flow.Click on create.

Under Object select "Pipe Lining". Click on A record is created or updated.

Set Entry Conditions : None

Select Actions and Related Records

Under record trigger flow click on "+" icon and select Send Email Alert.

In New Action Select Pipe Lining Template.

Label : Mail

API Name : Mail

Record ID : {!$Record.Id}

Click Done.

Under record trigger flow click on "+" icon and select Decision

For New Decision :

Label : Material

Api Name : Material

For Outcome Details :

Label : Iron Material

Outcome API Name : Iron_Material

Condition Requirements to Execute Outcome : Condition Requirements to Execute Outcome

Resource : {!$Record.Material_Type__c}

Operator : Equals

Value : Iron

In the Outcome Order click '+' Icon and create another four outcomes for Aluminum, Metal(for each outcome keep the respective value)

For Aluminum >> Value : Aluminum

For Metal >> Value : Metal

The Outcome Details will be seen like below :

Under Iron click on "+" icon and select Update Related Record.

Label : For Iron

API Name : For_Iron

How to Find Records to Update and Set Their Value : Select Use the Pipe Lining record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource
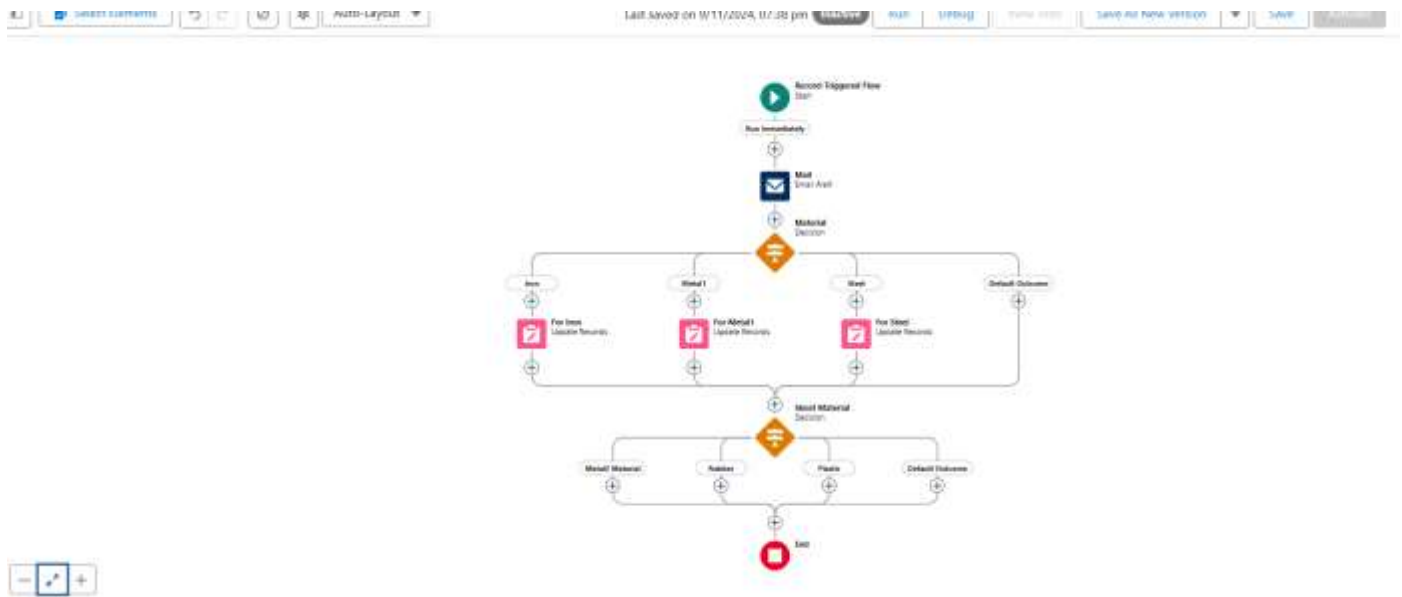
In Resource Type : Select Formula

API Name : IronCost
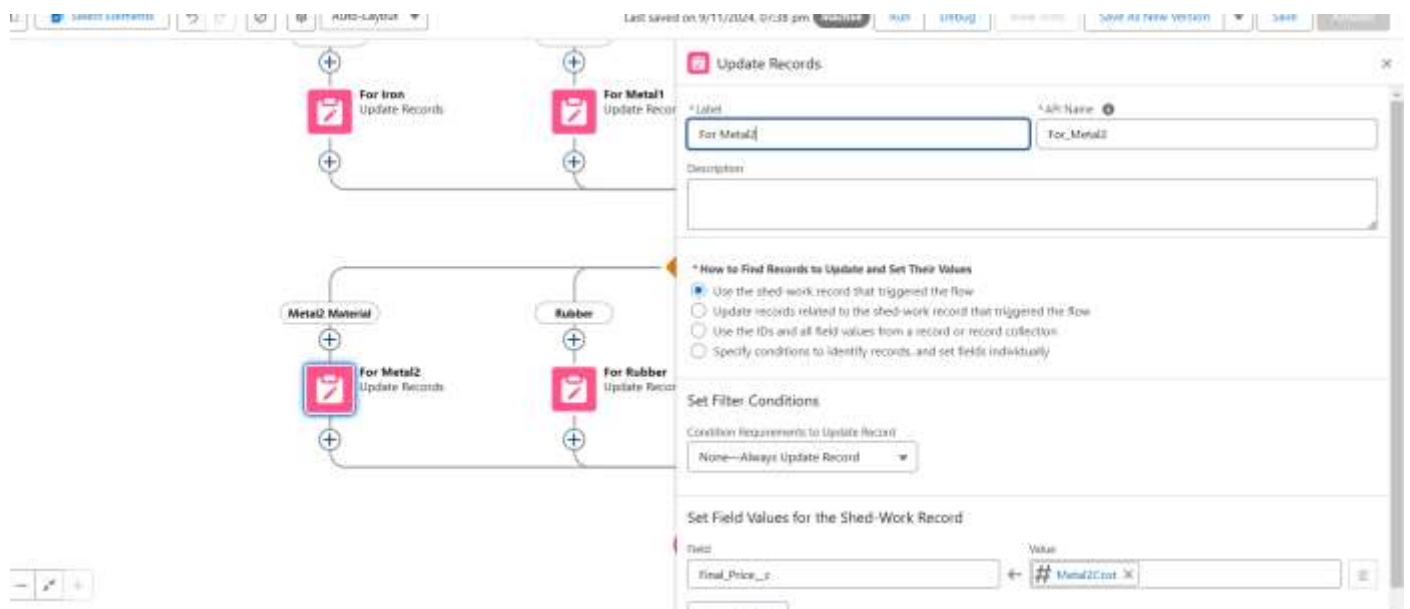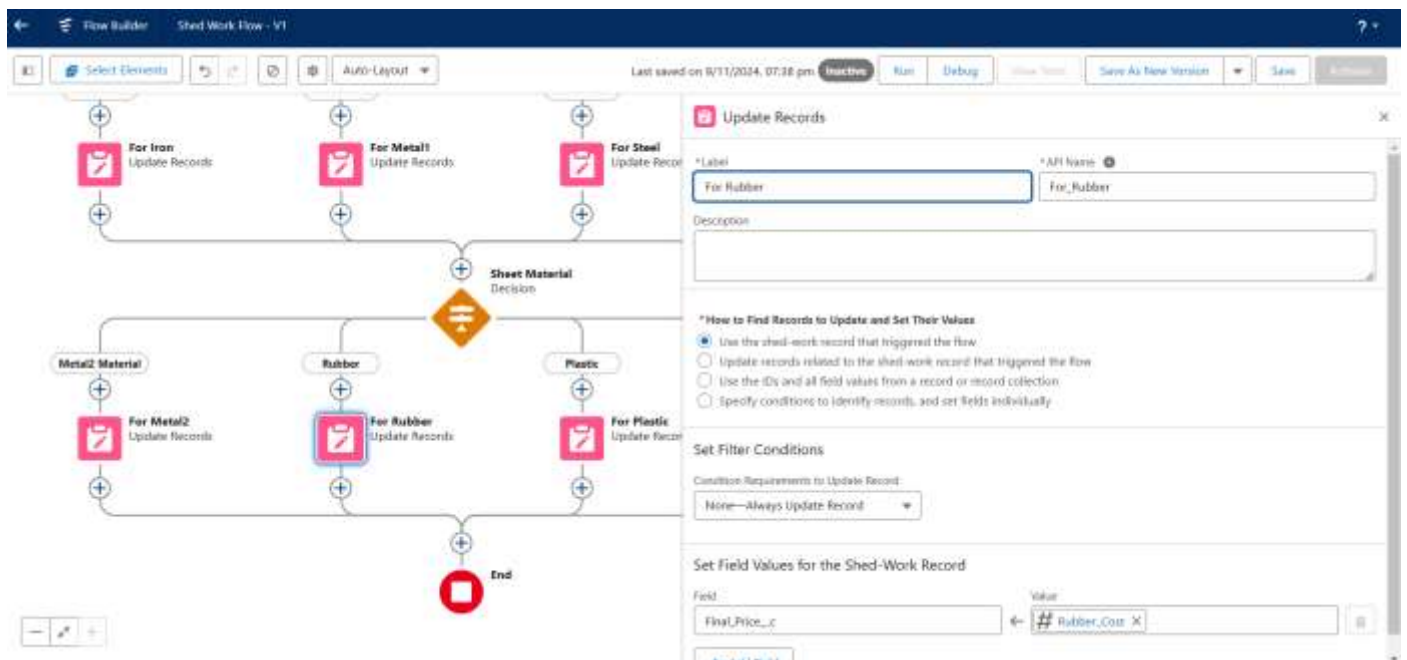
Data Type : Number

Decimal Places : 2

Formula : {!$Record.Amount__c} * 2

Click Done

Click Done

Under Aluminum click on "+" icon and select Update Related Record.

Label : For Aluminum

API Name : For_Aluminum

How to Find Records to Update and Set Their Value : Select Use the Pipe Lining record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

In Resource Type : Select Formula

API Name : Aluminum_Cost

Data Type : Number

Decimal Places : 2

Formula : {!$Record.Amount__c} * 1.8

Click Done

Under Steel Material click on "+" icon and select Update Related Record.

Label : For Metal

API Name : For_Metal

How to Find Records to Update and Set Their Value : Select Use the Pipe Lining record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

In Resource Type : Select Formula

API Name : MetalCost

Data Type : Number

Decimal Places : 2

Formula : {!$Record.Amount__c} * 1.5

Click Done

Click on Save

Flow Label : Pipe Lining Flow

Flow API Name : Pipe_Lining_Flow

Click Save

The Flow will like this :