

Create App

Step-by-Step Guide to Design & Develop a Custom App on Salesforce Lightning Platform

◆ Step 1: Sign Up for Salesforce Trailhead

1. Go to <https://trailhead.salesforce.com>.
 2. Create a free Trailhead account (or log in).
 3. Connect a **Trailhead Playground** (a free Salesforce org for learning).
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◆ Step 2: Launch Your Trailhead Playground

1. Navigate to any Trailhead module (e.g., “Build a Custom Object”).
 2. Click **Launch** next to your Playground (a Salesforce org opens in a new tab).
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◆ Step 3: Define the App Idea

Before building, decide:

- What does your app do? (e.g., Track internships, Manage student projects, Book appointments)
- Who are the users? (e.g., Admins, Customers, Employees)
- What data will be stored?

 **Example App:** *Student Project Tracker*

◆ Step 4: Create a Custom App

1. In Setup (gear icon > **Setup**), type **App Manager** in Quick Find.
 2. Click **App Manager > New Lightning App**.
 3. Fill in:
 - App Name: Student Project Tracker
 - App Label, Description, Branding
 4. Choose **Standard Navigation**.
 5. Assign to user profiles (e.g., System Administrator).
 6. Add tabs (custom objects, dashboards, etc.).
 7. Save and finish.
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◆ Step 5: Create Custom Objects

1. Go to **Object Manager > Create > Custom Object**.
2. Example: Project
 - Label: Project
 - Plural Label: Projects
 - Record Name: Project Name
 - Enable Reports and Activities
3. Save the object.

✚ Repeat for other entities like:

- Student
 - Supervisor
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◆ Step 6: Add Custom Fields to Objects

1. In **Object Manager > Project > Fields & Relationships > New**.
2. Add fields like:
 - Start Date (Date)
 - End Date (Date)
 - Status (Picklist: Pending, In Progress, Completed)
 - Student (Lookup to Student Object)

Do the same for other objects.

◆ Step 7: Create Relationships

- Use **Lookup** or **Master-Detail** fields to relate objects.
 - Example: One Student can have many Projects.
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◆ Step 8: Customize Page Layouts and Tabs

1. In Object Manager > Project > **Page Layouts**:
 - Drag and drop fields, sections as needed.
2. Add the object tab:
 - Setup > Tabs > New Custom Object Tab
 - Choose your object and an icon.

- Add it to your app via App Manager.
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◆ Step 9: Add Business Logic (Optional)

Use Apex/Automation:

- **Validation Rules:** Ensure dates are valid.
 - **Flows:** Automate field updates or record creation.
 - **Apex Classes/Triggers:** Add custom server-side logic.
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◆ Step 10: Build List Views and Reports

- Use **List Views** for filtered data (e.g., All Completed Projects).
 - Create **Reports and Dashboards:**
 - Setup > Reports > New Report
 - Choose Object, add filters, and summarize data.
 - Save and add to dashboard.
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◆ Step 11: Test Your App

- Create sample records.
 - Check relationships, field validations, workflows.
 - Test as a different user profile (if assigned).
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◆ Step 12: Deploy and Share

- App is already live in Playground.
 - If using a Developer Org, you can:
 - Create a **change set** to move it to another org.
 - Share access with users via profiles and permission sets.
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Tools You'll Use

- **App Builder:** Drag-and-drop UI for app and page layout design.
- **Object Manager:** To create and configure objects and fields.
- **Lightning App Builder:** To customize page layouts visually.
- **Flow Builder:** For no-code automation.

- **Apex Code:** For custom logic if needed.
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Recommended Trailhead Modules:

1. [Platform App Builder Basics](#)
2. [Build a Data Model for a Recruiting App](#)
3. [Automate Your Business Processes with Lightning Flow](#)
4. [Apex Basics & Database](#)