

Name- Aditi Bose

Registered Email Id on SmartInternz and Trailhead- aditibose224@gmail.com

Trailhead Link: <https://www.salesforce.com/trailblazer/aditibose>

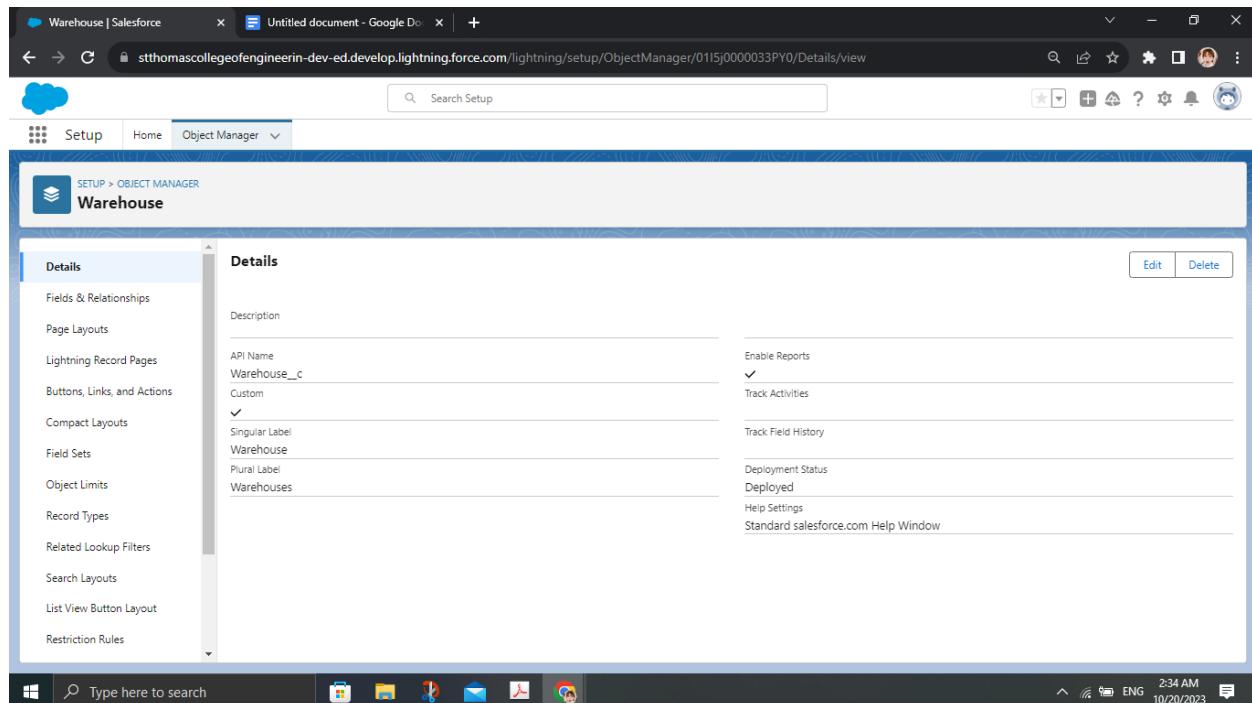
Retail Management Application Using Salesforce - DEV)- Guided Project Steps and Screenshots

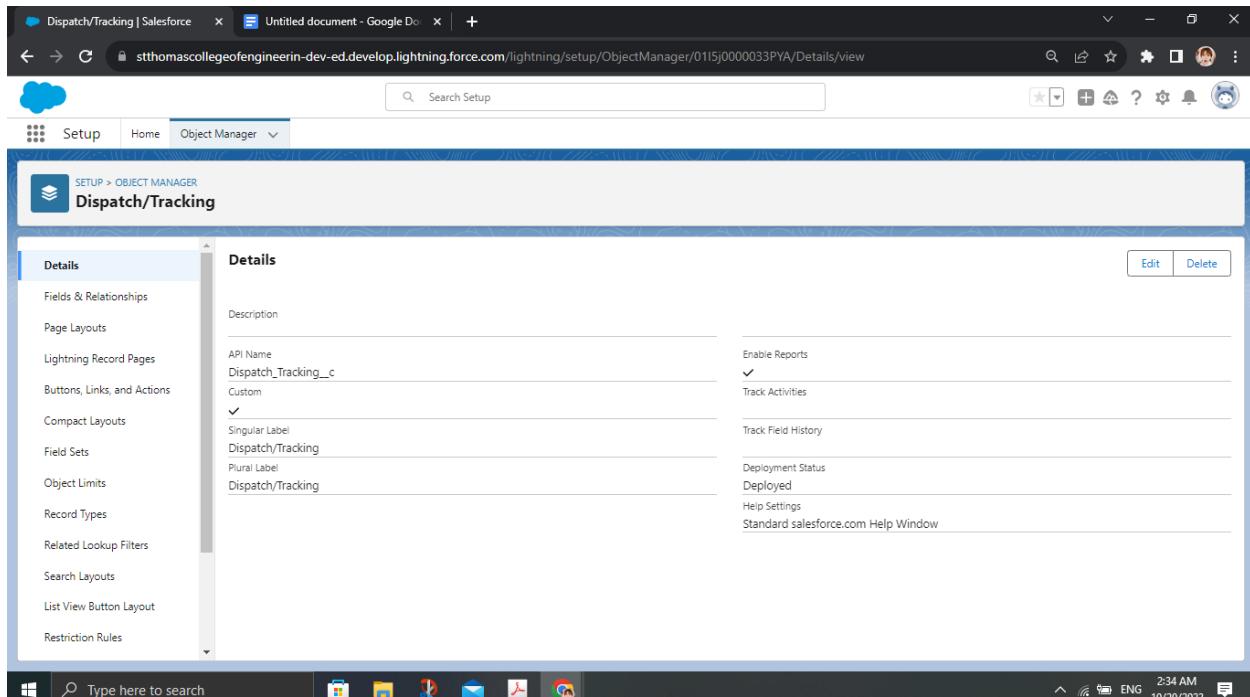
Creating Developer Org

Link to Developer org created:

<https://stthomascollegeofengineerin-dev-ed.develop.lightning.force.com/lightning/setup/SetupOnHome/home>

Creation Of Warehouse Object (creating 2 more objects as Sales order, Dispatch/Tracking)

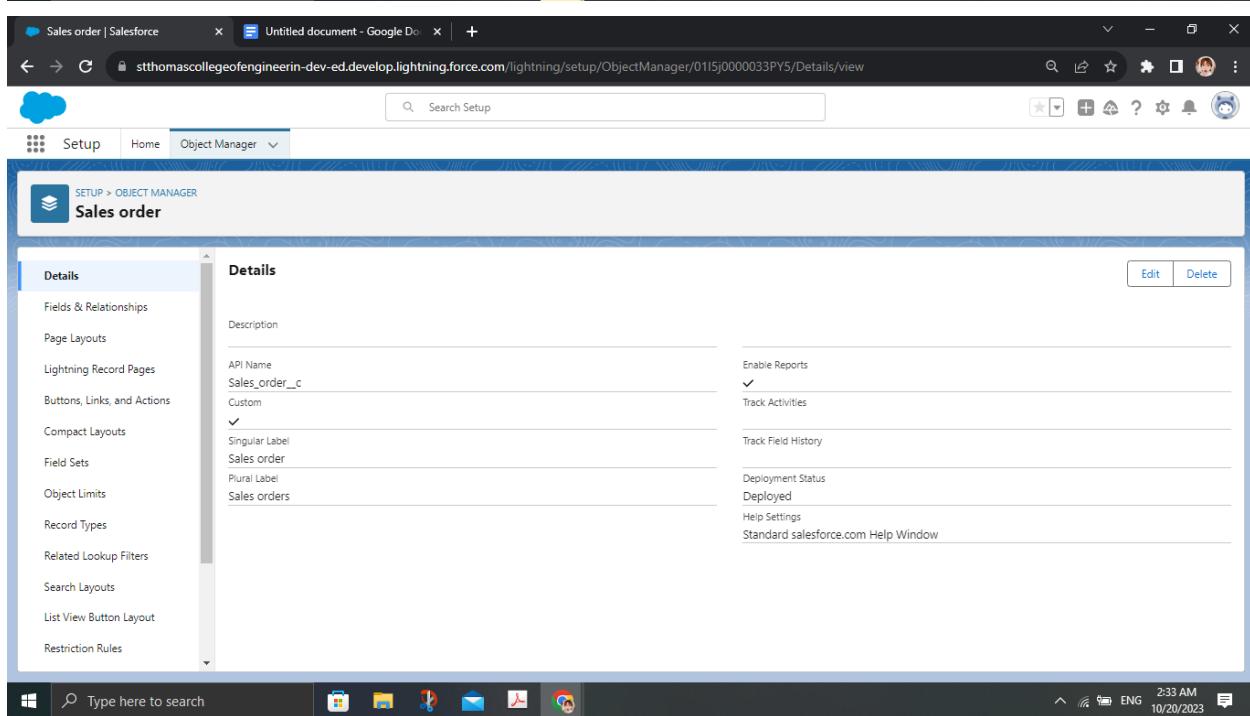




The screenshot shows the Salesforce Object Manager interface for the 'Dispatch/Tracking' object. The left sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main 'Details' tab displays the following information:

- Description: (empty)
- API Name: Dispatch_Tracking_c
- Custom: ✓
- Singular Label: Dispatch/Tracking
- Plural Label: Dispatch/Tracking

On the right, there are sections for Reports, Activities, Field History, Deployment Status, and Help Settings.



The screenshot shows the Salesforce Object Manager interface for the 'Sales order' object. The left sidebar lists the same configuration options as the previous screenshot. The main 'Details' tab displays the following information:

- Description: (empty)
- API Name: Sales_order_c
- Custom: ✓
- Singular Label: Sales order
- Plural Label: Sales orders

On the right, there are sections for Reports, Activities, Field History, Deployment Status, and Help Settings.

Create A Tab For Warehouse Object (Create Tabs for all Custom Objects – Sales order, Dispatch /Tracking.)

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Action	Label	Tab Style	Description
Edit Del	Activities	Hammer	
Edit Del	Departments	Building Block	
Edit Del	Dispatch/Tracking	Caduceus	
Edit Del	Employees	Chalkboard	
Edit Del	Projects	Factory	
Edit Del	Sales Orders	Hands	
Edit Del	Warehouses	Building Block	

Web Tabs

No Web Tabs have been defined.

Create The Sales App

Lightning Experience App Manager

24 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name ↑	Developer Name	Description	Last Modified ...	Type	Status
11 Organization Management	Organization_Management	The fundamental Lightning Platform	28/08/2023, 2:10 am	Lightning	✓
12 Platform	Platform	The fundamental Lightning Platform	24/08/2023, 1:27 am	Classic	✗
13 Queue Management	QueueManagement	Create and manage queues for your business.	24/08/2023, 1:27 am	Lightning	✓
14 Sales	Sales	The world's most popular sales force automation (SFA) solution	24/08/2023, 1:27 am	Classic	✗
15 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and m...	24/08/2023, 1:27 am	Lightning	✓
16 Sales App	Sales_App	Manage your sales process with accounts, leads, opportunities, and m...	18/10/2023, 4:28 pm	Lightning	✓
17 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on...	24/08/2023, 1:27 am	Lightning	✓
18 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	24/08/2023, 1:27 am	Classic	✓
19 Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	24/08/2023, 1:29 am	Lightning	✓
20 SalesforceDX Namespace Registry	DEVHUB_fndbmjcusjmqwzv2j...	The Developer Hub lets you view, create and manage scratch orgs and ...	17/10/2023, 5:50 pm	Connected	✗
21 Service	Service	Manage customer service with accounts, contacts, cases, and more	24/08/2023, 1:27 am	Classic	✓
22 Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records...	24/08/2023, 1:27 am	Lightning	✓
23 Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.co...	24/08/2023, 1:27 am	Classic	✗

Creation Of Fields For The Dispatch/Tracking (and Warehouse) Object

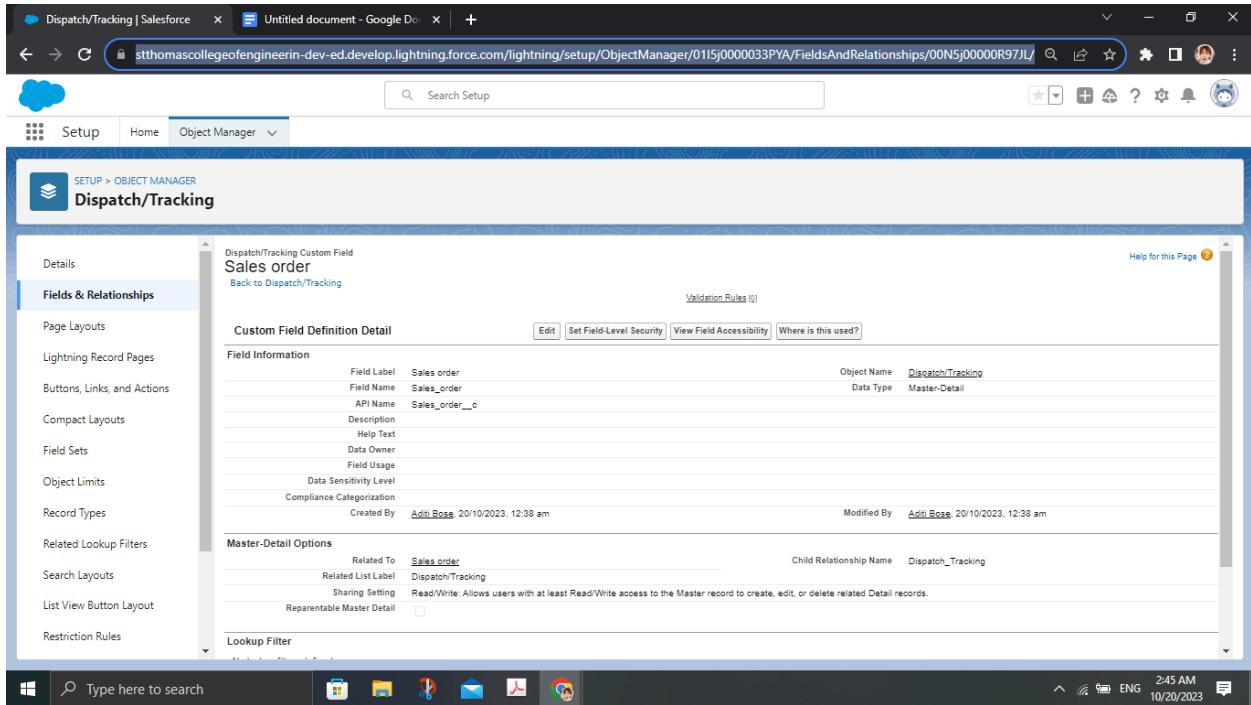
The screenshot shows the Salesforce Setup interface for the Dispatch/Tracking object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, Buttons, etc. The main area displays the 'Fields & Relationships' section for the Dispatch/Tracking object. The table shows the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Dispatch/Tracking	Name	Text(80)		✓
Dispatched	Dispatched__c	Date		
Last Modified By	LastModifiedBy	Lookup(User)		
Sales order	Sales_order__c	Master-Detail(Sales order)		✓
Tracking ID	Tracking_ID__c	Text(40)		

The screenshot shows the Salesforce Setup interface for the Warehouse object. The left sidebar lists various setup options. The main area displays the 'Fields & Relationships' section for the Warehouse object. The table shows the following fields:

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

Create A Master-Detail Relationship On Dispatch/Delivery Object



Create A Pick-List Field On Sales Order

The screenshot shows the Salesforce Object Manager interface for the Sales Order object. A new custom field named 'Order confirmed' is being created under the 'Fields & Relationships' tab. The field is defined as a Picklist type, with the API name set to 'Order_confirmed__c'. The 'Required' checkbox is checked. Under 'Picklist Options', the 'Restrict picklist to the values defined in the value set' checkbox is checked, and a 'Controlling Field' dropdown is set to 'New'. The field information table includes details like Field Label, Field Name, API Name, Description, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The field was created by 'Aditi_Bose' on 20/10/2023 at 2:14 am and modified by the same user at the same time.

The screenshot shows the configuration of the 'Order confirmed' picklist field. It highlights the 'Values' section where two items are listed: 'Yes' and 'No'. Both items have their 'Default' and 'Chart Colors' fields set to 'Assigned dynamically'. The 'Modified By' field for both items shows 'Aditi_Bose' on 20/10/2023 at 2:14 am. Other sections visible include 'Controlling Field' (set to 'New'), 'Field Dependencies' (empty), and 'Validation Rules' (empty).

Create A Lookup Relationship On Sales Order Object With Account Object

The screenshot shows the Salesforce Object Manager interface. A custom field named 'Customer' has been created on the 'Sales Order' object. The field is defined as a lookup type, related to the 'Account' object. It is labeled 'Customer' and has the API name 'Customer__c'. The field is required and is categorized under 'Sales orders'. There are no validation rules defined for this field.

Custom Field Definition Detail

Field Information	Value	Object Name	Data Type
Field Label	Customer	Sales_order	
Field Name	Customer		Lookup
API Name	Customer__c		
Description	Help Text		
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Aditi_Bose	20/10/2023, 12:42 am	
Modified By	Aditi_Bose	20/10/2023, 12:42 am	

Lookup Options

Related To	Account	Child Relationship Name	Sales_orders
Related List Label	Sales orders		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

Validation Rules

No validation rules defined.

Create A Lookup Relationship On Sales Order Object With Contact Object With Use Of Lookup Filter.

The screenshot shows the Salesforce Object Manager interface for creating a custom field named 'Contact' on the 'Sales Order' object.

Custom Field Definition Detail:

- Field Information:**
 - Field Label: Contact
 - Field Name: Contact
 - API Name: Contact_c
 - Description: Help Text
 - Data Owner: Field Usage
 - Data Sensitivity Level: Compliance Categorization
 - Created By: Aditi Bose (20/10/2023, 12:45 am)
 - Modified By: Aditi Bose (20/10/2023, 12:45 am)
 - Object Name: Sales_order
 - Data Type: Lookup
- Lookup Options:**
 - Related To: Contact
 - Related List Label: Sales orders
 - Required:
 - What to do if the lookup record is deleted?: Clear the value of this field.
 - Child Relationship Name: Sales_orders
- Lookup Filter:**
 - Filter Criteria: Contact: Account Name ID EQUALS Sales order: Customer ID
 - Filter Type: Required. The user-entered value must match filter criteria.
 - Error Message: Value does not exist or does not match filter criteria.
 - Lookup Window Text: Active:
- Validation Rules:** No validation rules defined.

Create Order Date Field On Sales Order

The screenshot shows the Salesforce Object Manager interface for the 'Sales order' object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main panel displays the 'Order date' custom field definition. The 'Field Information' section shows the field label 'Order date', field name 'Order_date', API name 'Order_date__c', and data type 'Date'. The 'General Options' section indicates it is required. The 'Validation Rules' section shows a note: 'No validation rules defined.' The top right corner has a 'Help for this Page' link.

Cross-Object Formula Field

The screenshot shows the Salesforce Object Manager interface for the 'Contact' object. The left sidebar lists various configuration options. The main panel shows the creation of a new formula field named 'Account_Website'. The 'Formula Options' section includes fields for 'Field Name' (set to 'Account_Website'), 'Description', 'Help Text', 'Data Owner' (set to 'User'), 'Field Usage' (set to '--None--'), 'Data Sensitivity Level' (set to '--None--'), and 'Compliance Categorization' (with 'PII', 'HIPAA', 'GDPR', and 'PCI' listed under 'Available' and 'Chosen'). The 'Formula Options' section also includes a 'Simple Formula' tab where the formula 'Account Website (Text) = Account.Website' is entered. A 'Quick Tips' sidebar provides links to 'Getting Started' and 'Calculators & Functions'.

The screenshot shows the Salesforce Setup interface for creating a custom field. The object being modified is 'Contact'. The custom field being created is named 'Account Website'.

Custom Field Definition Detail

Field Information	Value
Field Label	Account Website
Field Name	Account__Website
API Name	Account_Website__c
Description	Help Text
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Aditi_Bose, 20/10/2023, 12:55 am
Modified By	Aditi_Bose, 20/10/2023, 12:55 am

Formula Options

Value
Account.Website

Object Manager

- 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
- Hierarchy Columns

Giving a help text while creating Location filed on Warehouse Object.

Help Text- To locate product in Warehouse.

The screenshot shows the Salesforce Setup interface for creating a custom field. The object being modified is 'Warehouse'. The custom field being created is named 'Location'.

Custom Field Definition Detail

Field Information	Value
Field Label	Location
Field Name	Location
API Name	Location__c
Description	To locate product in Warehouse.
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Aditi_Bose, 20/10/2023, 12:58 am
Modified By	Aditi_Bose, 20/10/2023, 12:58 am

General Options

Value
Required <input type="checkbox"/>
Default Value

Validation Rules

Value
New
No validation rules defined.

Object Manager

- 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

Creating A User

Users | Salesforce Untitled document - Google Doc | +

stthomascollegeofengineering-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005j00000ARrV%3Fnoredirect%3D1%...

Search Setup

Setup Home Object Manager

Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION Users Permission Set Groups Permission Sets Profiles Public Groups Queues Roles User Management Settings Users Data Email

User Detail

Name: Ad Bose Alias: abose Email: adibose223@gmail.com [Verify] Username: adibose@ed.com Nickname: User16977437081874388909 Title: Company: Department: Division: Address: Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata) Locale: English (India) Language: English Delegated Approver: Manager: Receive Approval Request Emails: Only if I am an approver

Role: Active User License: Salesforce Profile: Standard User Marketing User Offline User Knowledge User Flow User Service Cloud User Site.com Contributor User Site.com Publisher User WDC User Mobile Push Registrations: View Data.com User Type: Accessibility Mode (Classic Only): Debug Mode:

User Profile Help for this Page

2:57 AM 10/20/2023

Users | Salesforce Untitled document - Google Doc | +

stthomascollegeofengineering-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005j00000ARrV%3Fnoredirect%3D1%...

Search Setup

Setup Home Object Manager

Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION Users Permission Set Groups Permission Sets Profiles Public Groups Queues Roles User Management Settings Users Data Email

Language: English Delegated Approver: Manager: Receive Approval Request Emails: Only if I am an approver Federation ID: App Registration: One-Time Password Authenticator: App Registration: Salesforce Authenticator: Security Key (U2F or WebAuthn): Lightning Login: Temporary Verification Code (Expires in 1 to 24 Hours): [Generate]

Mobile Push Registrations: View Data.com User Type: Accessibility Mode (Classic Only): Debug Mode: High-Contrast Palette on Charts: Load Lightning Pages While Scrolling: ✓ (View) Salesforce CRM Content User: Receive Salesforce CRM Content Email Alerts: ✓ Receive Salesforce CRM Content Alerts as Daily Digest: ✓ Make Setup My Default Landing Page: Allow Forecasting: Call Center: Phone: Extension: Fax: Mobile: Email Encoding: Unicode (UTF-8) Employee Number: Used Data Space: 0 B (View) Used File Space: 0 B (View) Last Login: Last Password Change or Reset: 20/10/2023, 1:01 am Failed Login Attempts: 1

2:57 AM 10/20/2023

Users | Salesforce Untitled document - Google Doc

stthomascollegeofengineerin-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005j00000ARv5%3Fnoredirect%3D1%...

Search Setup

Setup Home Object Manager

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

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

Users

- Data
- Email

Type here to search

2:58 AM ENG 10/20/2023

Used Data Space 0 B [View] Used File Space 0 B [View]

Last Login 20/10/2023, 1:01 am Failed Login Attempts 0

Created By Aditi_Bose 20/10/2023, 1:01 am Modified By Aditi_Bose 20/10/2023, 1:01 am

Individual

PERMISSION SET ASSIGNMENTS

No records to display

PERMISSION SET ASSIGNMENTS: ACTIVATION REQUIRED

No records to display

PERMISSION SET GROUP ASSIGNMENTS

No records to display

PERMISSION SET LICENSE ASSIGNMENTS

No records to display

Permission Set Assignments Help ?

Permission Set Assignments: Activation Required Help ?

Permission Set Group Assignments Help ?

Permission Set License Assignments Help ?

2:58 AM ENG 10/20/2023

Users | Salesforce Untitled document - Google Doc

stthomascollegeofengineerin-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home

Search Setup

Setup Home Object Manager

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

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

Users

- Data
- Email

Type here to search

2:58 AM ENG 10/20/2023

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app [Let's Go](#)

View: All Users [Edit](#) [Create New View](#)

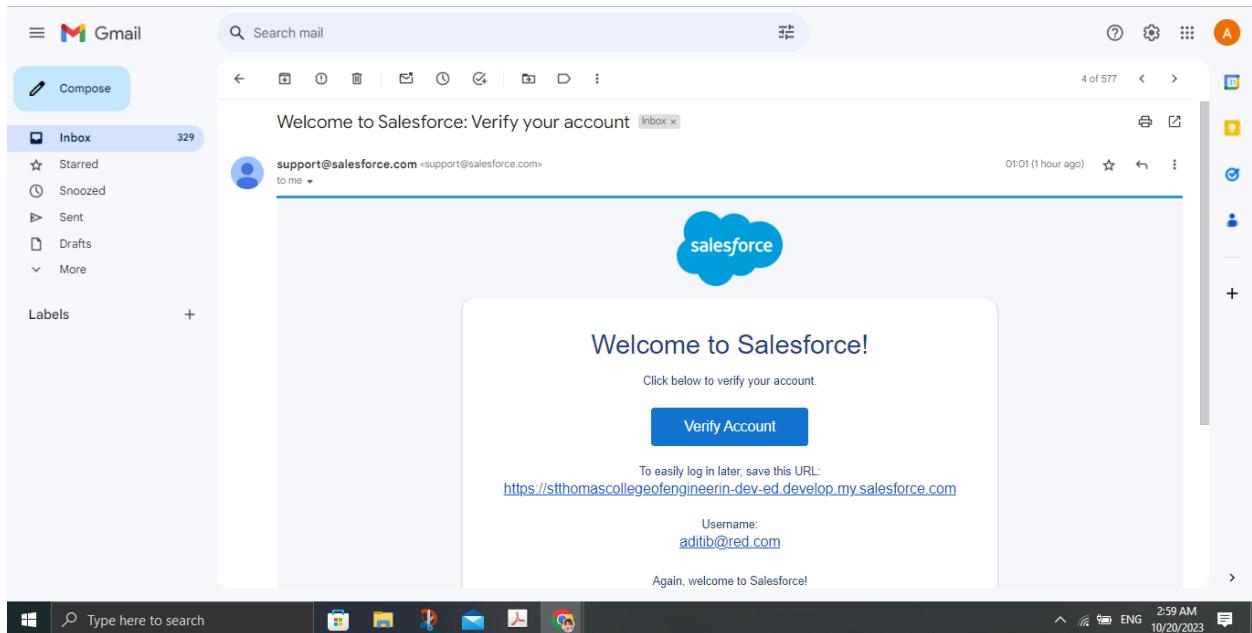
Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Aditi_Bose	abose	adlib@red.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard User
<input type="checkbox"/>	Aditi_Bose	ABose	adlibose24@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.0050000000000000@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	User_Integration	Integ	integration@00d5000000000000@ear.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00d5000000000000@ear.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

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 User Reset Password(s) Add Multiple Users

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]

2:58 AM ENG 10/20/2023



Create Record (Sales Order)

A screenshot of the Salesforce Lightning interface. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Sales orders', and 'More'. The main content area shows a 'Recently Viewed' list under 'Sales orders' with 2 items: 'S-0001' and 'S-0002'. A toolbar above the list includes 'New', 'Import', and 'Change Owner' buttons. A search bar and filter icons are also present. The status bar at the bottom shows a search bar, taskbar icons, and system information like '1:25 AM 10/20/2023'.

View Record (Sales Order)

The image displays two side-by-side screenshots of the Salesforce Lightning interface, showing the details of two different sales orders.

Sales Order S-0001 Details:

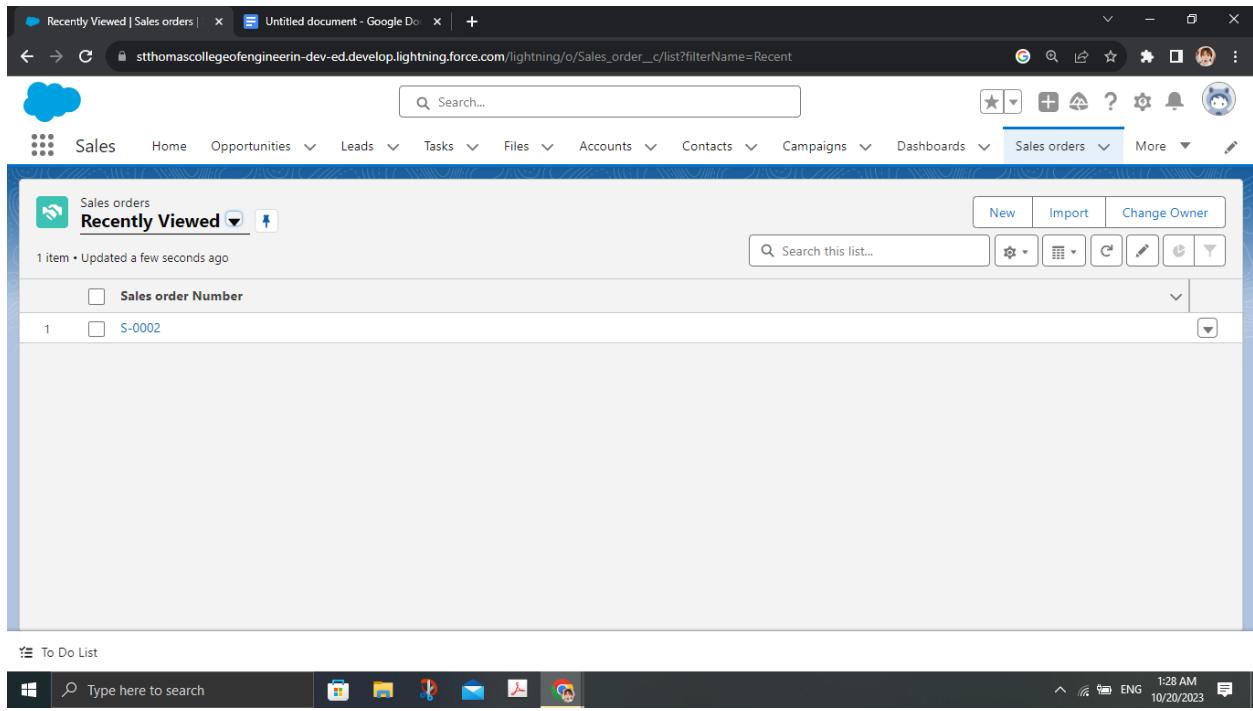
- Sales order Number:** S-0001
- Status:** Open
- Customer:** United Oil & Gas Corp.
- Contact:** [Empty]
- Order date:** [Empty]
- Created By:** Aditi Bose, 20/10/2023, 1:19 am
- Last Modified By:** Aditi Bose, 20/10/2023, 1:19 am

Sales Order S-0002 Details:

- Sales order Number:** S-0002
- Status:** Hold
- Customer:** Burlington Textiles Corp of America
- Contact:** [Empty]
- Order date:** [Empty]
- Created By:** Aditi Bose, 20/10/2023, 1:20 am
- Last Modified By:** Aditi Bose, 20/10/2023, 1:20 am

Both screenshots show a standard Salesforce header with navigation links like Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Sales orders, and More. The bottom of each screenshot shows a Windows taskbar with a search bar and various pinned application icons.

Delete Record (Sales Order)



Create Report

The screenshot shows the Salesforce Report Builder interface. The top navigation bar includes tabs for 'Report Builder | Salesforce' and 'Untitled document - Google Doc'. The main header has a blue cloud icon, a search bar, and various navigation links like Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, and More. A 'REPORT' dropdown is open, showing 'New Sales orders with Customer Report' and 'Sales orders with Customer'. The central workspace displays a table with one row: 'Sales order: Sales order Number' (S-0002) and 'Customer: Account Name' (Burlington Textiles Corp). The left sidebar shows sections for 'Groups' (with 'Add group...' button) and 'Columns' (with 'Add column...' button). At the bottom, there are checkboxes for Row Counts, Detail Rows, Subtotals, and Grand Total. A status bar at the bottom right shows '10:30 AM 10/20/2023'.

View Report

The screenshot shows the Salesforce report preview interface. The top navigation bar and header are identical to the Report Builder screen. The main workspace displays the 'New Sales orders with Customer Report' titled 'Report: Sales orders with Customer'. It shows a single record: 'Customer: Account Name' (Burlington Textiles Corp of America) and 'Sales order: Sales order Number' (S-0002). Below this, there are sections for 'Subtotal' and 'Total (1)'. At the bottom, there are checkboxes for Row Counts, Detail Rows, Subtotals, and Grand Total. A status bar at the bottom right shows '10:34 AM 10/20/2023'.

Create Dashboard

Sales App Dashboard

New Sales orders with Customer Report

Record Count

Burlington Textiles ... 1

Customer Account Name

View Report (New Sales orders with Customer Report)

Dashboard saved

To Do List

View Dashboard

Dashboards | Salesforce

Recent

1 item

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Sales App Dashboard	Private Dashboards	Aditi Bose	20/10/2023, 1:41 am		

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

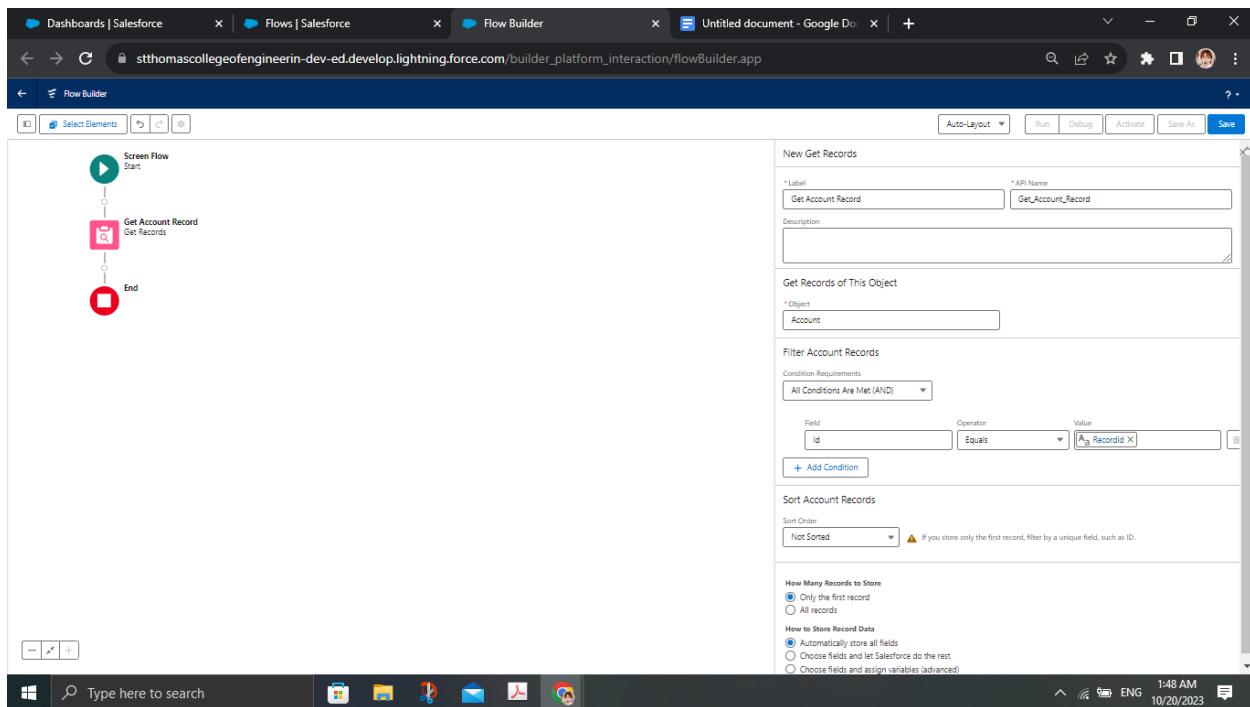
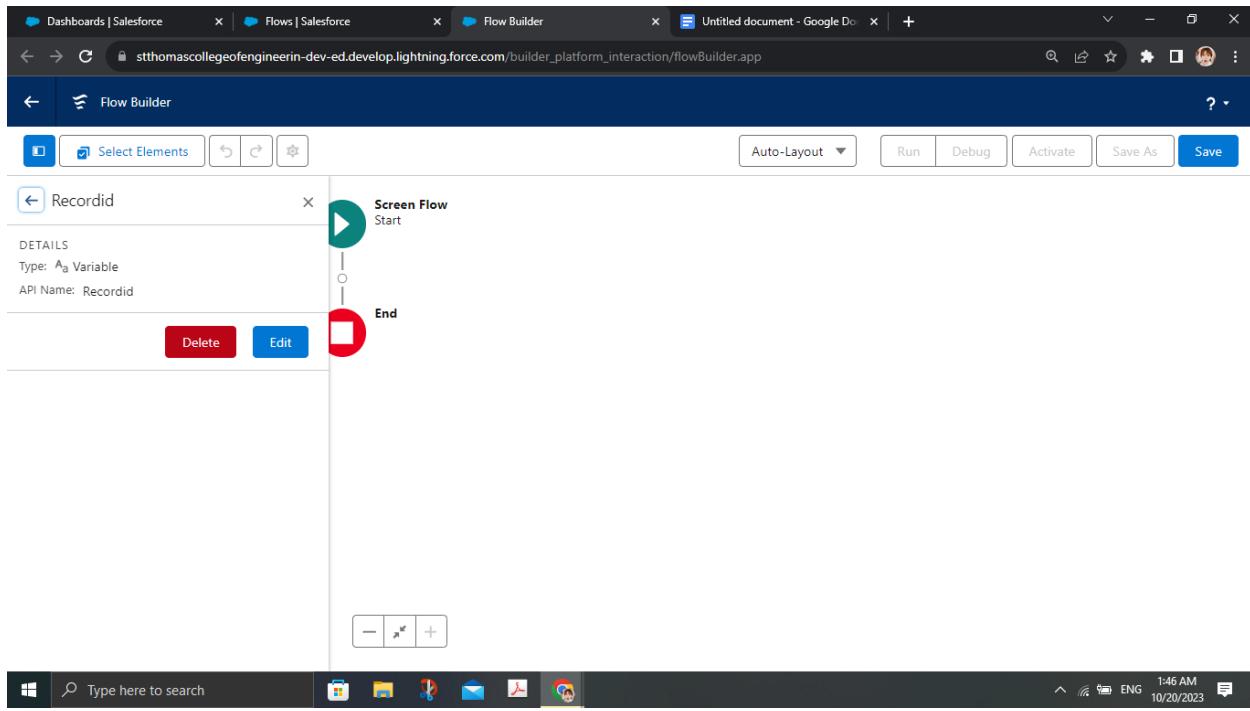
Created by Me

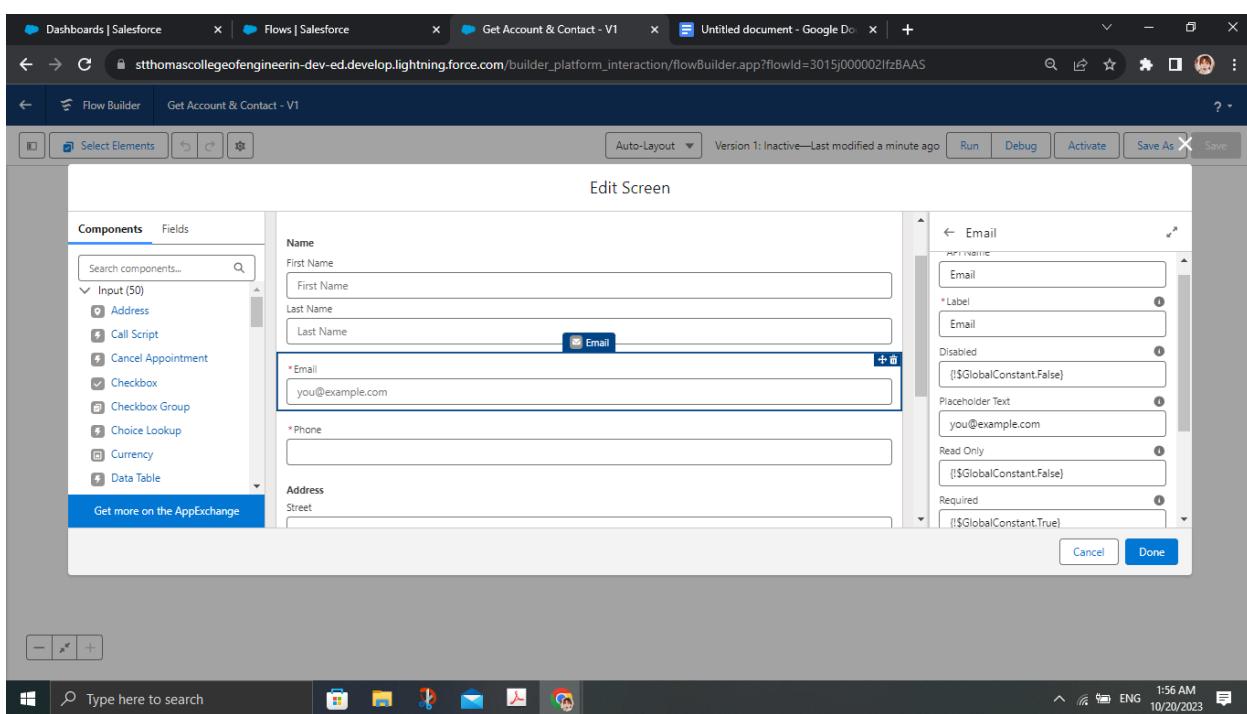
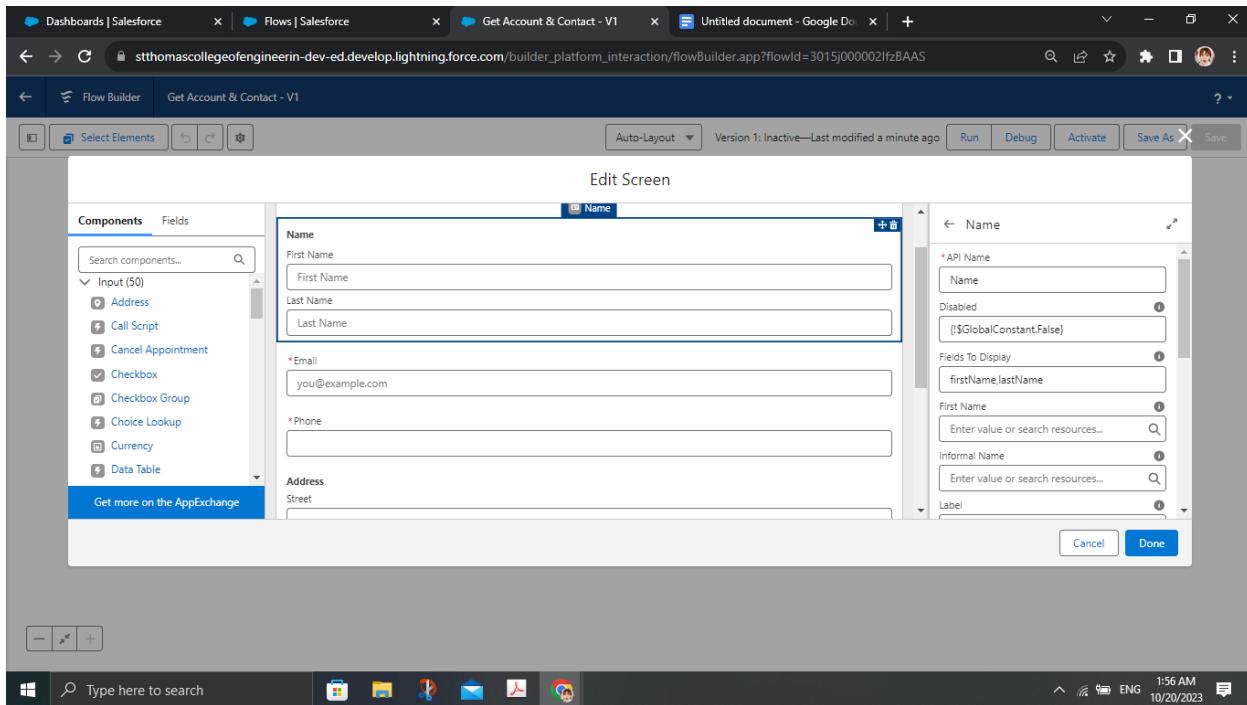
Shared with Me

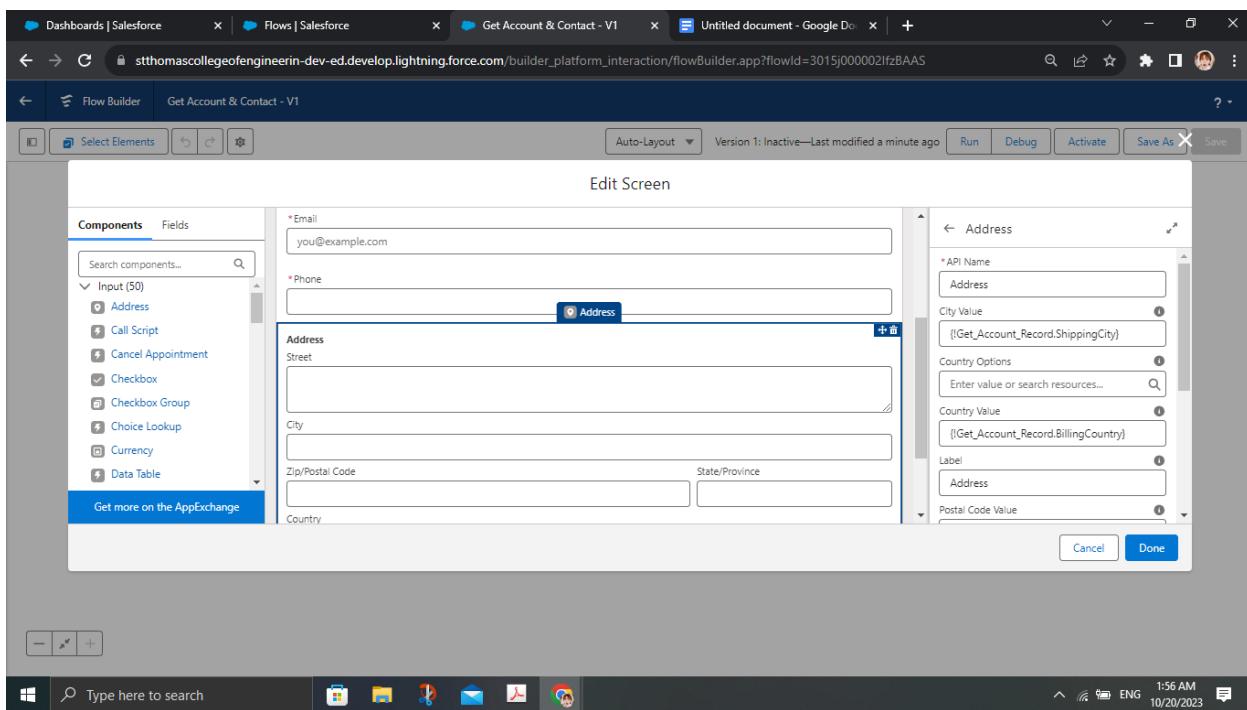
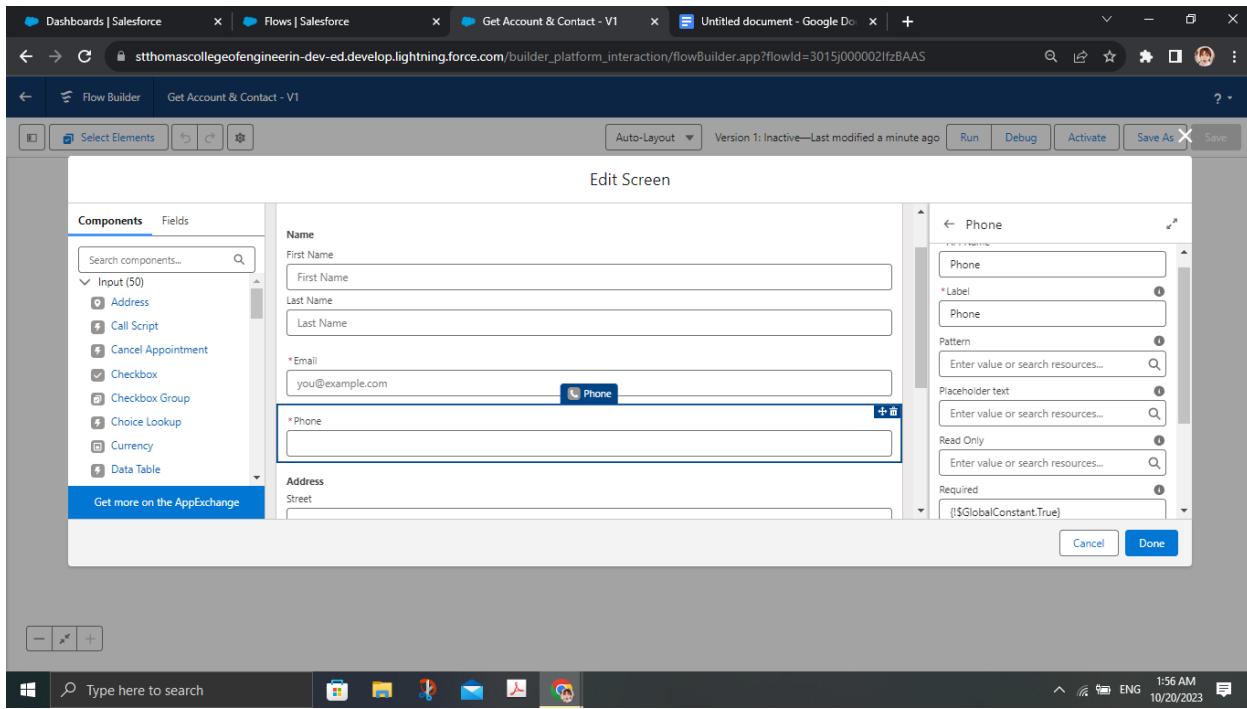
FAVORITES

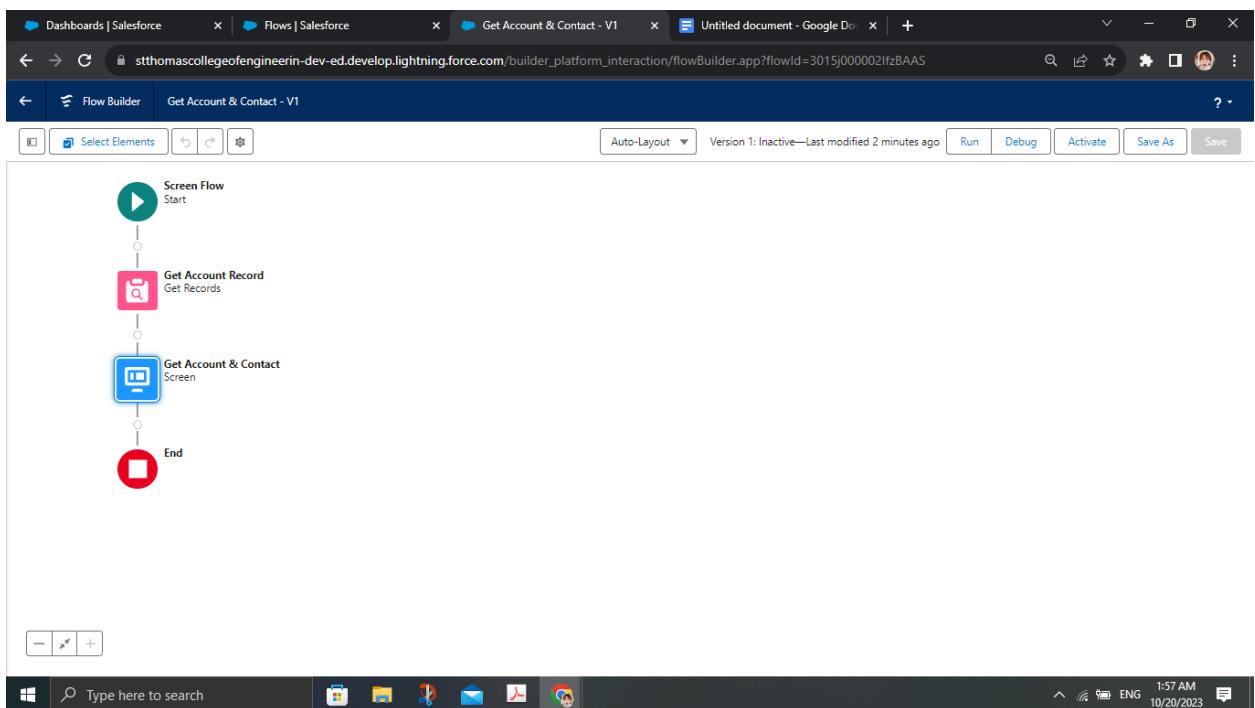
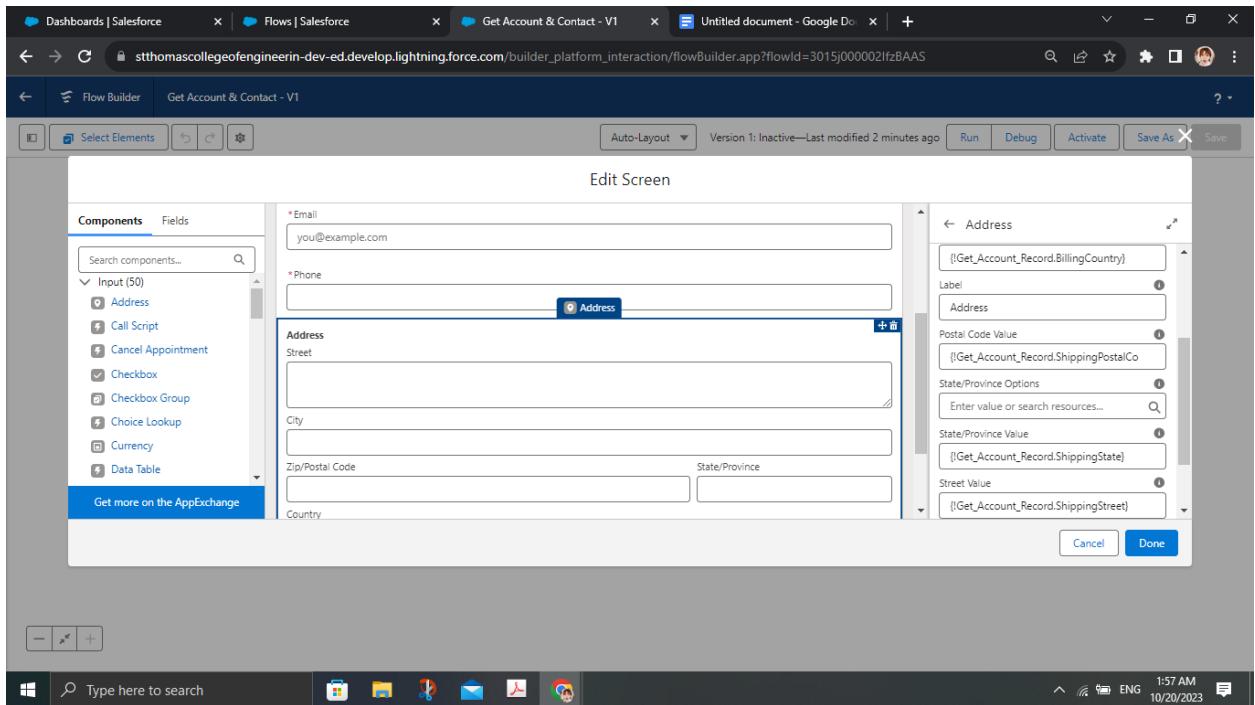
To Do List

Create Flow









To Create Lightning Home Page

The image displays two screenshots of the Salesforce interface. The top screenshot shows the Lightning App Builder canvas with a placeholder for a flow component. The bottom screenshot shows a browser window displaying a 'Get Account & Contact' page with a form for entering account information.

Lightning App Builder Screenshot:

- Header: Account & Contact - Lightning, Flows | Salesforce, Get Account & Contact - V1, Untitled document - Google Doc
- Canvas: Components section, Standard (32) category selected. Placeholder components: Add Component(s) Here, Add Component(s) Here, Flow Component: Get Account & Contact (This is a placeholder: Flows don't run in the canvas).
- Right Panel: Page > Flow, Flow titled "Get Account & Contact", RecordId input field, Set Component Visibility, Filters, Add Filter button, Tips panel.
- Bottom: Windows taskbar with search bar, icons for File Explorer, File Manager, Mail, and Google Chrome, system status bar showing 2:04 AM, 10/20/2023.

Browser Screenshot:

- Header: Home | Salesforce, Flows | Salesforce, Get Account & Contact - V1, Untitled document - Google Doc
- Content: Sales tab selected, navigation bar: Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, More.
- Form: Get Account & Contact page with fields:
 - Name:
 - First Name:
 - Last Name:
 - Email:
 - Phone:
 - Address:
 - Street:
 - City:
 - Zip/Postal Code:
 - State/Province:
 - Country:
- Bottom: Windows taskbar with search bar, icons for File Explorer, File Manager, Mail, and Google Chrome, system status bar showing 2:07 AM, 10/20/2023.

To Send An Email Alert To The Customer Once Order Is Confirmed

Sales order | Salesforce Untitled document - Google Doc | +

stthomascollegeofengineering-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01i5j000003PY5/FieldsAndRelationships/00N5j00000R97...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Sales order

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

Sales order Custom Field Email Id Back to Sales order

Custom Field Definition Detail Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information Field Label Email Id Field Name Email_Id API Name Email_Id_c Description Help Text Data Owner Field Usage Data Sensitivity Level Compliance Categorization Created By Aditi_Bose 20/10/2023, 2:12 am Modified By Aditi_Bose 20/10/2023, 2:12 am

Object Name Sales_order Data Type Email

General Options Required Unique External ID Default Value

Validation Rules New Validation Rules Help

Type here to search

2:14 AM ENG 10/20/2023

Sales order | Salesforce Untitled document - Google Doc | +

stthomascollegeofengineering-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01i5j000003PY5/FieldsAndRelationships/00N5j00000R97...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Sales order

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

Sales order Custom Field Order confirmed Back to Sales order

Custom Field Definition Detail Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information Field Label Order confirmed Field Name Order_confirmed API Name Order_confirmed_c Description Help Text Data Owner Field Usage Data Sensitivity Level Compliance Categorization Created By Aditi_Bose 20/10/2023, 2:14 am Modified By Aditi_Bose 20/10/2023, 2:14 am

Object Name Sales_order Data Type Picklist

General Options Required Default Value

Picklist Options Restrict picklist to the values defined in the value set Controlling Field [New]

Type here to search

2:14 AM ENG 10/20/2023

The screenshot shows the Salesforce Object Manager interface for the 'Sales order' object. The left sidebar lists various configuration tabs: 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, and Restriction Rules. The main content area displays settings for the 'Fields & Relationships' tab, including:

- Picklist Values Used:** Active and inactive picklist values (2, 1,000 max).
- Field Dependencies:** No dependencies defined.
- Validation Rules:** No validation rules defined.
- Values:** A table showing two entries:

Action	Values	API Name	Default	Chart Colors	Modified By	Modified Date
<input type="checkbox"/> Edit Del Deactivate	Yes	Yes	<input type="checkbox"/>	Assigned dynamically	Aditi Boss	20/10/2023, 2:14 am
<input type="checkbox"/> Edit Del Deactivate	No	No	<input type="checkbox"/>	Assigned dynamically	Aditi Boss	20/10/2023, 2:14 am
- Inactive Values:** No Inactive Values values defined.

At the bottom, there are buttons for 'Delete Unused Values' and 'Values Help'. The status bar at the bottom right shows the time as 2:15 AM and the date as 10/20/2023.

To Create Record Trigger Flow

The screenshot shows the Salesforce Flow Builder interface for creating a record-triggered flow. The left pane displays the flow's structure:

```
graph TD; Start([Start]) --> Condition{ }; Condition --> End([End]);
```

The flow is triggered by 'A record is created' on the 'Sales order' object. It has one condition defined:

Configure Trigger

Trigger the Flow When:

- A record is created
- A record is updated
- A record is created or updated
- A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements: All Conditions Are Met (AND)

Field: Order_confirmed__c **Operator:** Equals **Value:** Yes

+ Add Condition

***Optimize the Flow for:**

- Fast Field Updates:** Update fields on the record that triggers the flow to run.
- Actions and Related Records:** Update any record and perform actions, like send an email.

At the bottom, there are buttons for 'Auto-Layout', 'Run', 'Debug', 'View Tests', 'Activate', 'Save As', and 'Save'. The status bar at the bottom right shows the time as 2:18 AM and the date as 10/20/2023.

Flows | Salesforce Flow Builder Untitled document - Google Doc

New Decision

* Label: Order confirmed * API Name: Order_confirmed

Description:

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER + **OUTCOME DETAILS**

Order Status Order Status *Label: Order Status *Outcome API Name: Order_Status

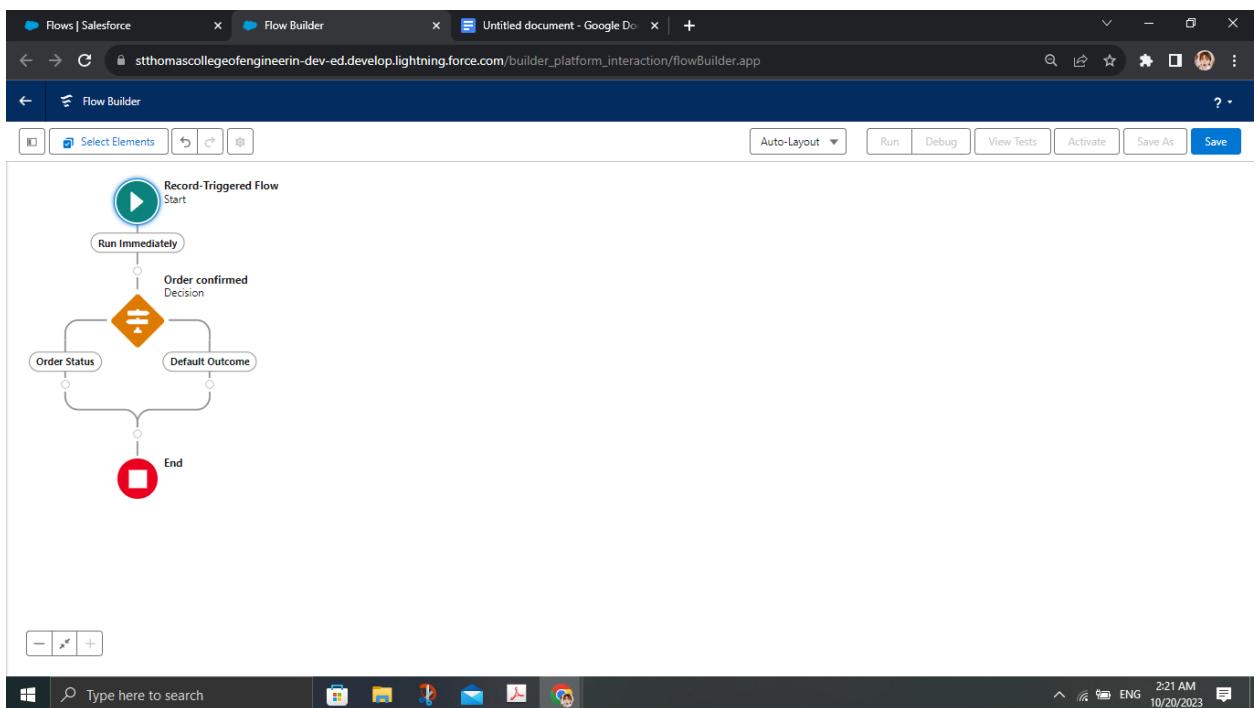
Default Outcome

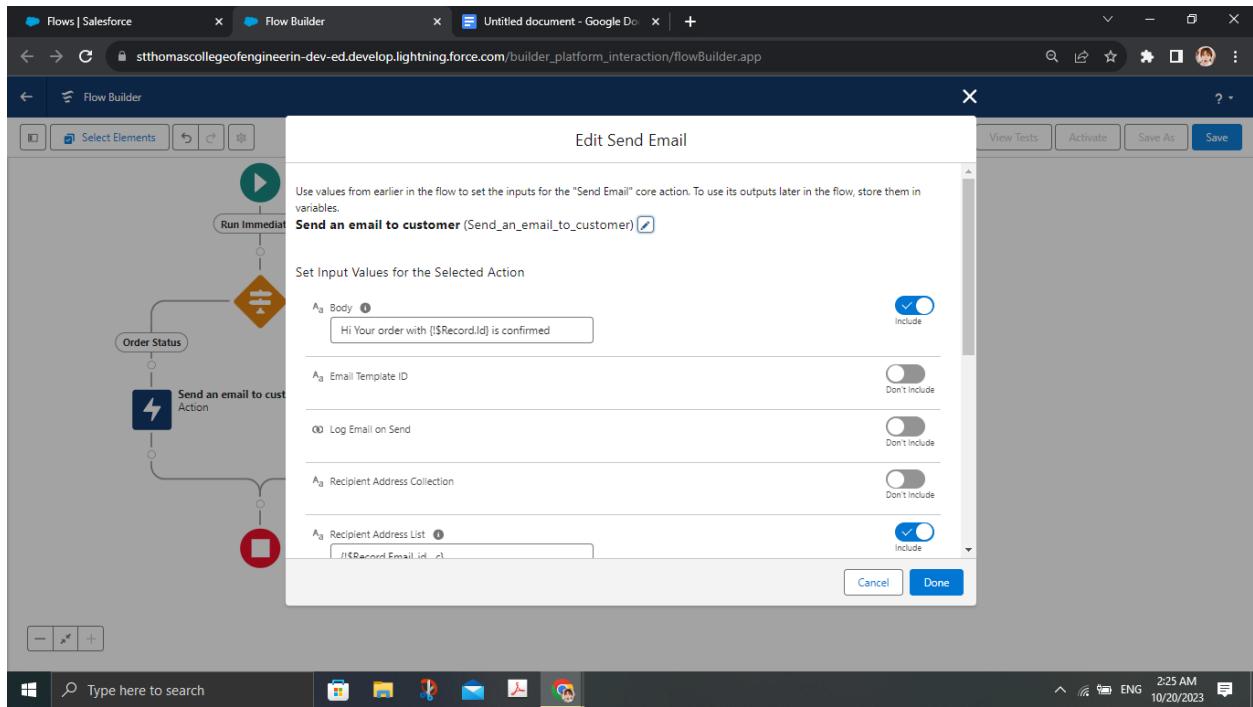
Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

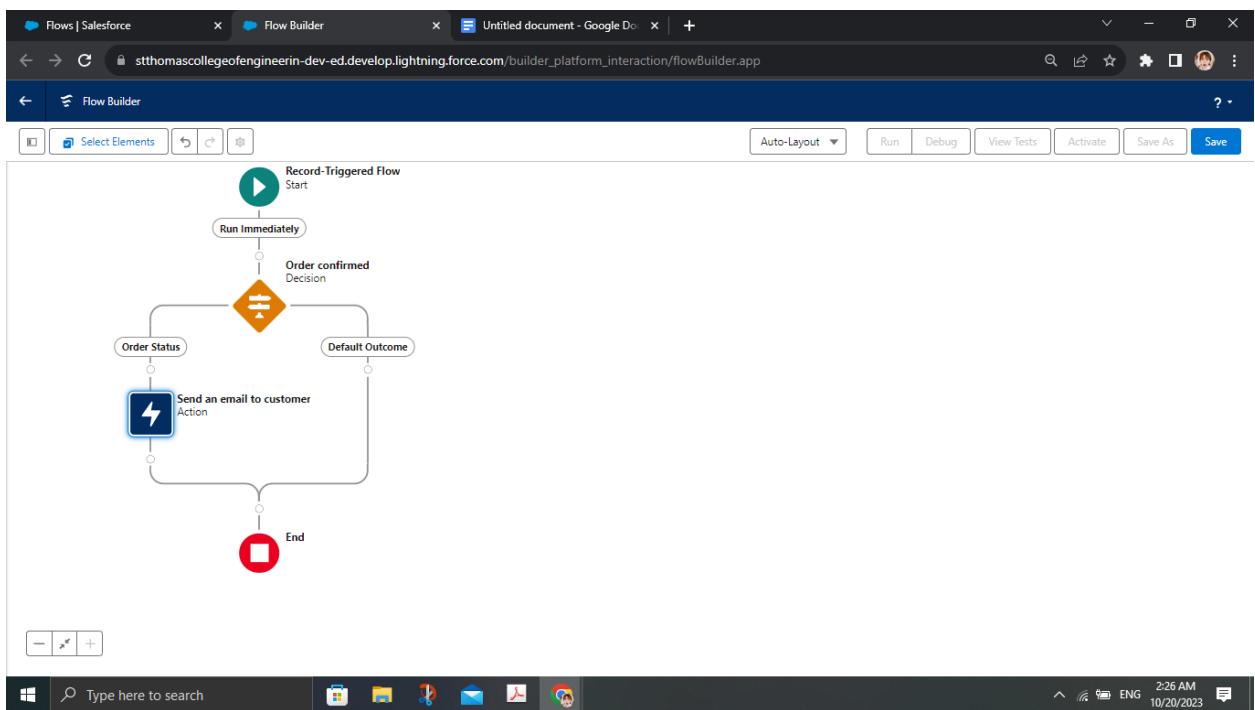
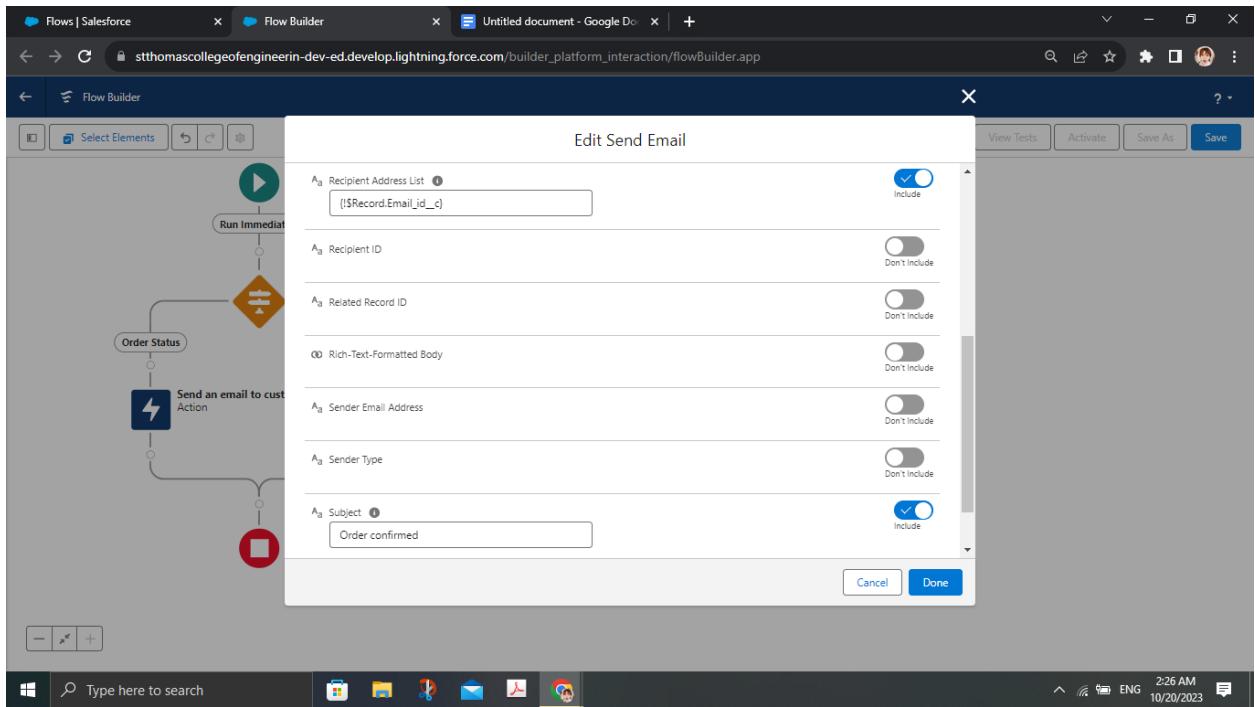
Resource: \$Record > Order confirmed Operator: Equals Value: Yes

+ Add Condition

Cancel Done







Trigger On Account To Prevent Duplicate Name

The image shows two separate windows of the Salesforce Developer Console, each displaying a different piece of Apex code.

Top Window:

- Title Bar:** Developer Console - Google Chrome
stthomascollegefengineerin-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
- Toolbar:** File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >
- Code Editor:** ToAvoidDuplicateHandler.apxc
- Code:**

```
1 public class ToAvoidDuplicateHandler {  
2     public static void preventDuplicate(list<Account> acclist){  
3         for (Account a : acclist){  
4             for (Account a1 : [Select id,name from Account]){  
5                 if(a.name == a1.name){  
6                     a.name.addError('This is a duplicate name');  
7                 }  
8             }  
9         }  
10    }  
11 }  
12 }  
13 }
```

Bottom Window:

- Title Bar:** Developer Console - Google Chrome
stthomascollegefengineerin-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
- Toolbar:** File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >
- Code Editor:** tovoidduplicates.apxt
- Code:**

```
1 trigger tovoidduplicates on Account (before insert) {  
2     if(trigger.isBefore){  
3         ToAvoidDuplicateHandler.preventDuplicate(trigger.new);  
4     }  
5 }
```