



Retail Management Application Using Salesforce - (Dev)

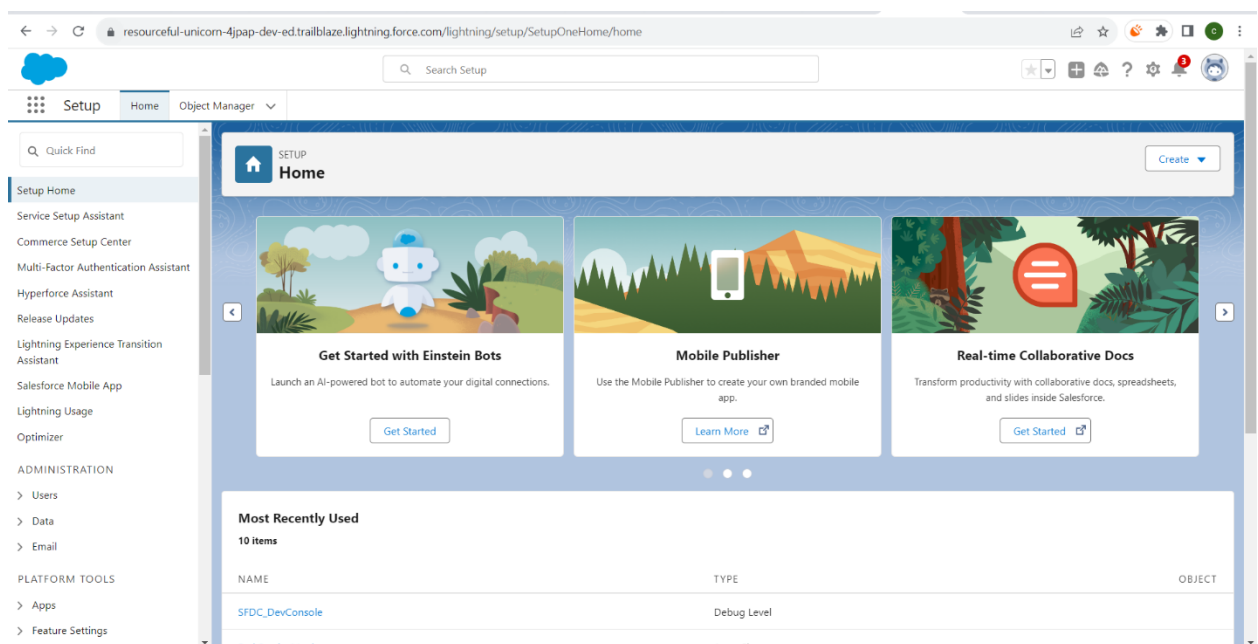
Creation Salesforce Org

What is Salesforce?

Salesforce is your customer success platform.

Creating Developer Org

Login to Your Salesforce Account



Creation Of Warehouse Object

1.Warehouse Object creation

Setup

Home

Object Manager

Search Setup

SETUP

Object Manager

New Custom Object

Help for this Page

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Save

Save & New

Cancel

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label

Warehouse

Example: Account

Plural Label

Warehouses

Example: Accounts

Starts with vowel sound

☐

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

Object Name

Warehouse

Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Content Name

--None--

Enter Record Name Label and Format

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

Record Name

Warehouse Name

Example: Account Name

New Admin Settings for Record Name

Setup

Home

Object Manager

Search Setup

SETUP

Object Manager

Data Type

Text

Optional Features

☒ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#)

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

Deployment Status

☐ In Development

☒ Deployed

[What is this?](#)

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#)

☒ Allow Search

Object Creation Options (Available only when custom object is first created)

☐ Add Notes and Attachments related list to default page layout

☐ Launch New Custom Tab Wizard after saving this custom object

Save

Save & New

Cancel

New Admin Settings for Record Name

Setup Home Object Manager ▾

Warehouse

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Details

Description

API Name
Warehouse_c

Custom
✓

Singular Label
Warehouse

Plural Label
Warehouses

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

Creation Of Sales order Object

Setup Home Object Manager ▾

Sales order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Details

Description

API Name
Sales_order__c

Custom
✓

Singular Label
Sales order

Plural Label
Sales orders

Enable Reports
✓

Track Activities

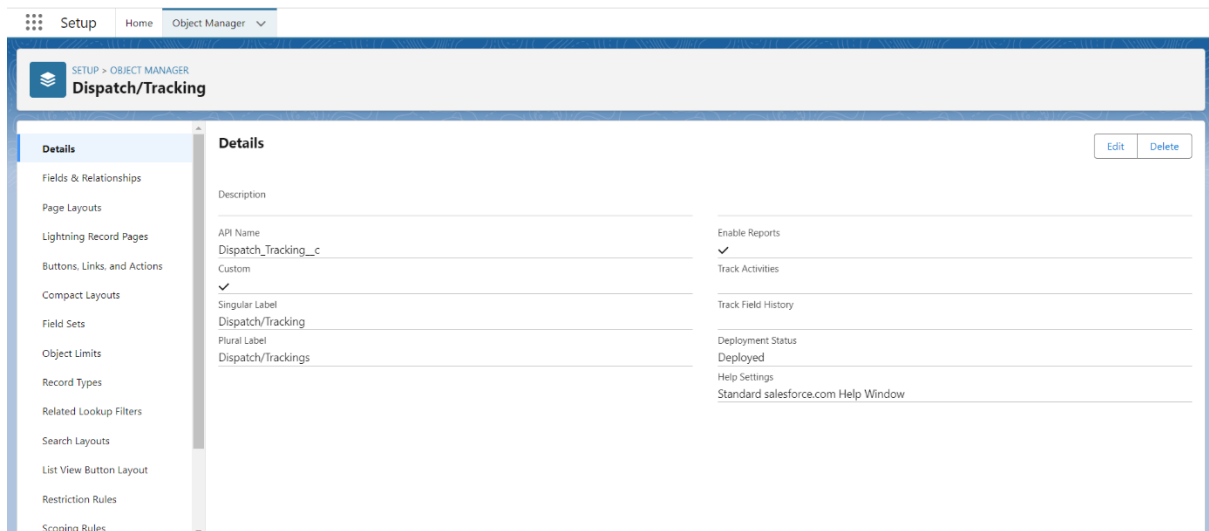
Track Field History

Deployment Status
Deployed

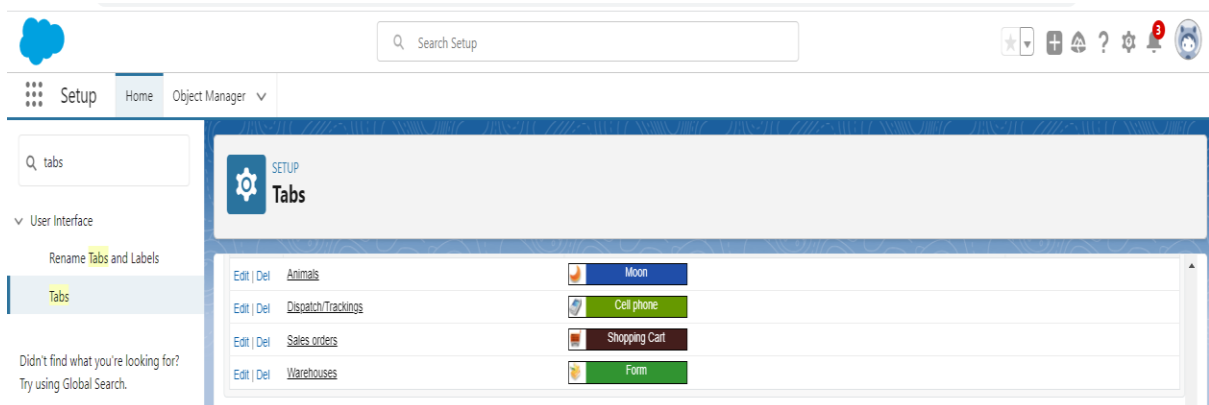
Help Settings
Standard salesforce.com Help Window

Edit Delete

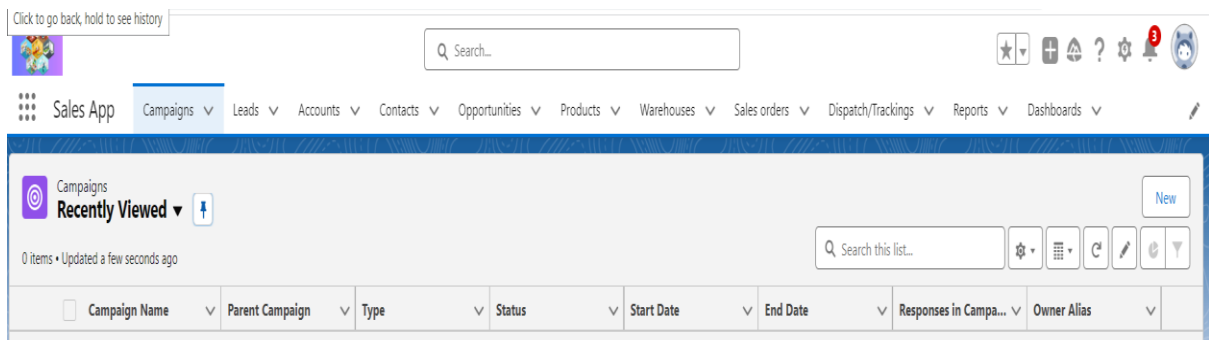
Creation Of Dispatch/Tracking Object



Create A Tab For Warehouse,Sales Order,Dispatch/Tracking Objects

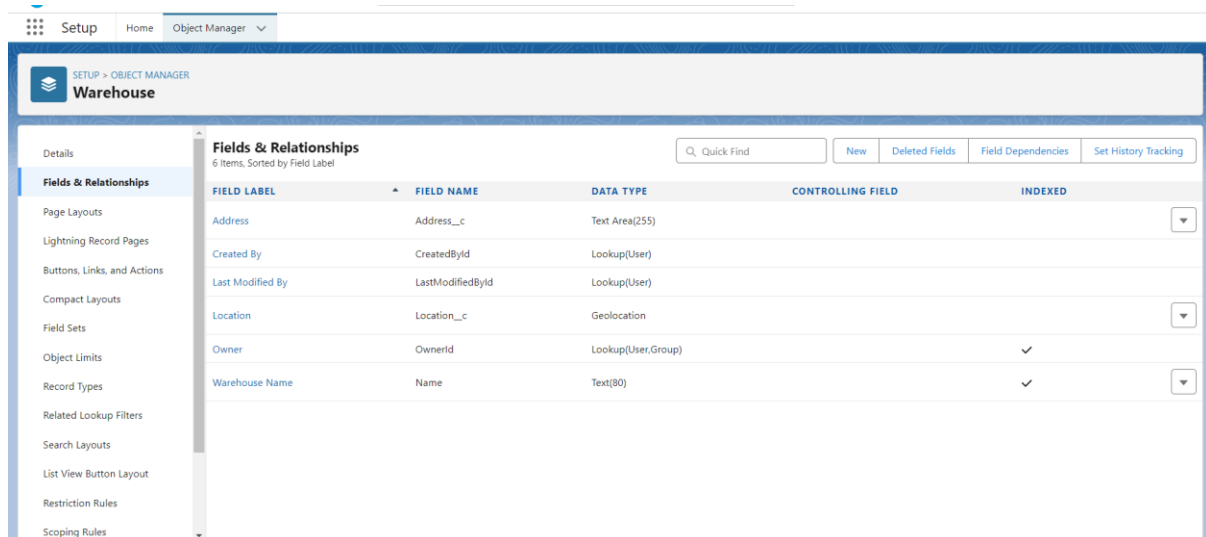


Create The Sales App



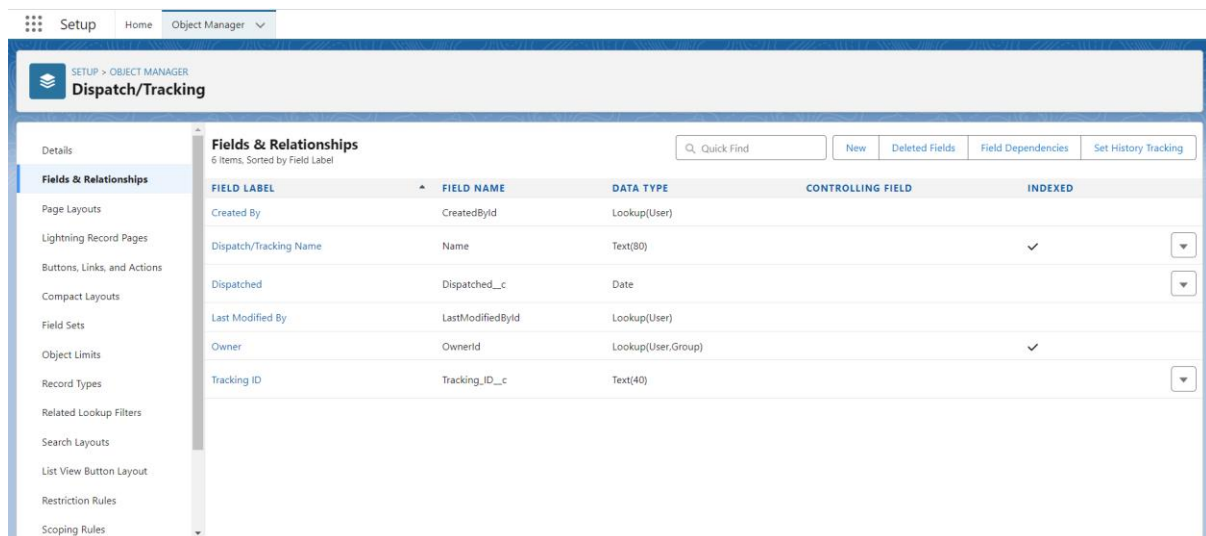
Fields And Relationship

Creation Of Fields For The Dispatch/Tracking Object



The screenshot shows the 'Warehouse' object configuration in Salesforce Setup. The 'Fields & Relationships' tab is selected, displaying a table of 6 fields. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, and others. The top navigation bar includes Setup, Home, and Object Manager.

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



The screenshot shows the 'Dispatch/Tracking' object configuration in Salesforce Setup. The 'Fields & Relationships' tab is selected, displaying a table of 6 fields. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, and others. The top navigation bar includes Setup, Home, and Object Manager.

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

Create A Master-Detail Relationship On Dispatch/Delivery Object

Setup Home Object Manager

SETUP > OBJECT MANAGER
Dispatch/Tracking

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

Dispatch/Tracking Custom Field
Sales order
[Back to Dispatch/Tracking](#)

Validation Rules (0)

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

Field Information

Field Label	Sales order	Object Name	Dispatch/Tracking
Field Name	Sales_order	Data Type	Master-Detail
API Name	Sales_order__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Chennakesavula Priyanka	Modified By	Chennakesavula Priyanka
	10/20/2023, 8:46 AM		10/20/2023, 8:46 AM

Master-Detail Options

Related To	Sales_order	Child Relationship Name	Dispatch_Trackings
Related List Label	Dispatch/Trackings		
Sharing Setting	Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		
Reparentable Master Detail	<input type="checkbox"/>		

Lookup Filter

No lookup filters defined.

Create A Pick-List Field On Sales Order

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

Scoping Rules

Sales order Custom Field
Status
[Back to Sales order](#)

Validation Rules (0)

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

Field Information

Field Label	Status	Object Name	Sales_order
Field Name	Status	Data Type	Picklist
API Name	Status__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Chennakesavula Priyanka	Modified By	Chennakesavula Priyanka
	10/20/2023, 8:50 AM		10/20/2023, 8:50 AM

General Options

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

Picklist Options

Restrict picklist to the values defined in the value set	<input checked="" type="checkbox"/>
Controlling Field	[New]

Create A Lookup Relationship On Sales Order Object With Account Object

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

Customizer Rules

Sales order Custom Field
Customer
[Back to Sales order](#)

Validation Rules III

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Customer	Object Name	Sales_order
Field Name	Customer	Data Type	Lookup
API Name	Customer__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Chennakesavula Priyanka, 10/20/2023, 8:53 AM	Modified By	Chennakesavula Priyanka, 10/20/2023, 8:53 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.		

Lookup Filter

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

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

Customizer Rules

Fields & Relationships
7 Items. Sorted by Field Label

[New](#) [Deleted Fields](#) [Field Dependencies](#) [Set History Tracking](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Contact	Contact__c	Lookup(Contact)		<input checked="" type="checkbox"/>

Create Order Date Field On Sales Order

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

Customizer Rules

Sales order Custom Field
Order date
[Back to Sales order](#)

Validation Rules III

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Order_date	Object Name	Sales_order
Field Name	Order_date	Data Type	Date
API Name	Order_date__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Chennakesavula Priyanka, 10/20/2023, 9:00 AM	Modified By	Chennakesavula Priyanka, 10/20/2023, 9:00 AM

General Options

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

Validation Rules [New](#) [Validation Rules Help](#)

Cross-Object Formula Field

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Contact

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Hierarchy Columns

Scoping Rules

Contact Custom Field

Account Website

Back to Contact Fields

Custom Field Definition Detail

Field Information

Field Label	Account Website	Object Name	Contact
Field Name	Account_Website		
API Name	Account_Website__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Chennakesavula Priyanka	Modified By	Chennakesavula Priyanka
	10/20/2023, 10:48 AM		10/20/2023, 10:48 AM

Formula Options

Data Type	Formula
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Account Website

Creation Of Validation Rule

Setup

Home

Object Manager

SETUP

Object Manager

Account Validation Rule

Back to Account Validation Rules

Validation Rule Detail

Rule Name

Phone_number_has_international_format

Active

Clone

Error Condition Formula

LEFT(Phone, 1) <> "+"

Error Message

Phone number must begin with + (country code).

Error Location

Phone

Description

Created By

Chennakesavula Priyanka

Modified By

Chennakesavula Priyanka

Create Record (Sales Order)

Sales App

Home

Campaigns

Leads

Accounts

Contacts

Opportunities

Products

Warehouses

Sales orders

Dispatch/Trackings

Reports

Dashboards

Sales orders

Recently Viewed

3 items • Updated a few seconds ago

Search this list...


New

Import

Change Owner

1	SO-0006	
2	SO-0005	
3	SO-0002	

Reports



Sales App
Home
Campaigns
Leads
Accounts
Contacts
Opportunities
Products
Warehouses
Sales orders
Dispatch/Trackings
Reports
Dashboards

Report: Sales orders with Customer

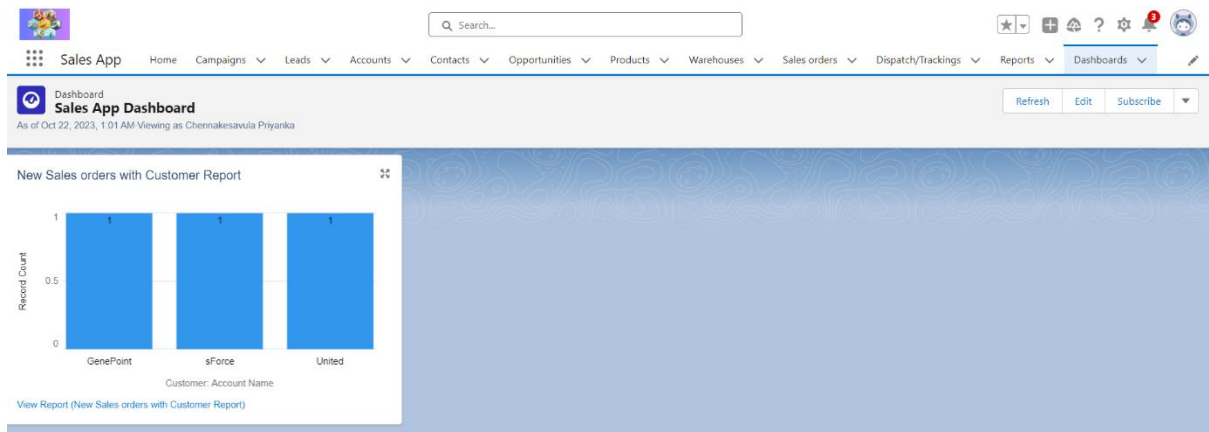
Enable Field Editing
Add Chart
Edit

Total Records
3

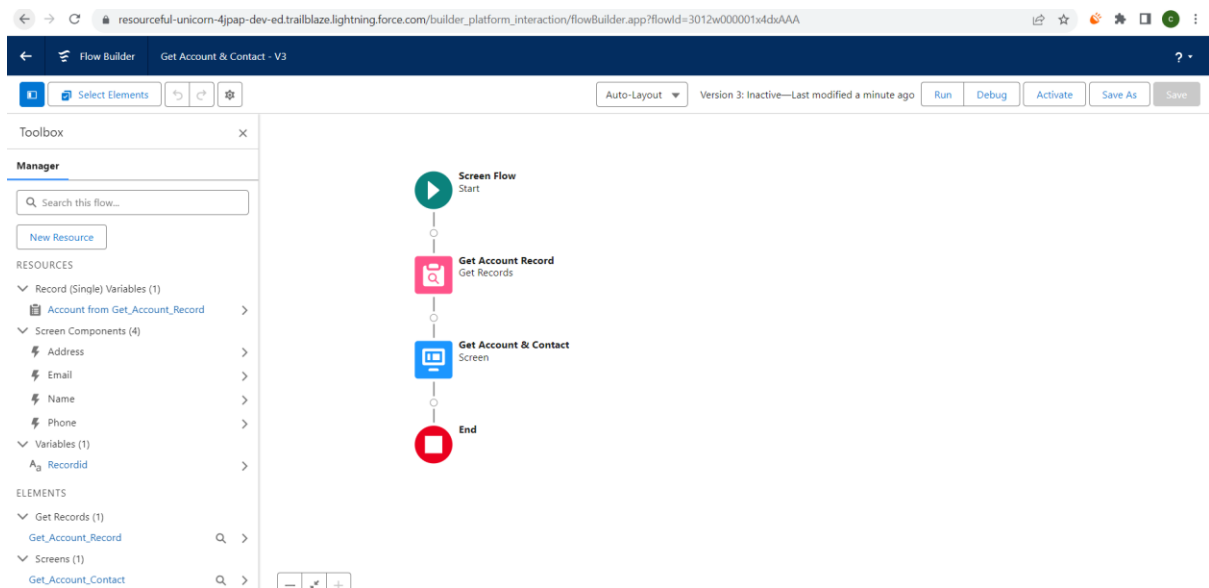
Customer: Account Name	Sales order: Sales order Number
GenePoint (1)	SO-0005
Subtotal	
sForce (1)	SO-0006
Subtotal	
United (1)	SO-0002
Subtotal	
Total (3)	

Row Counts
Detail Rows
Subtotals
Grand Total

Dashboards



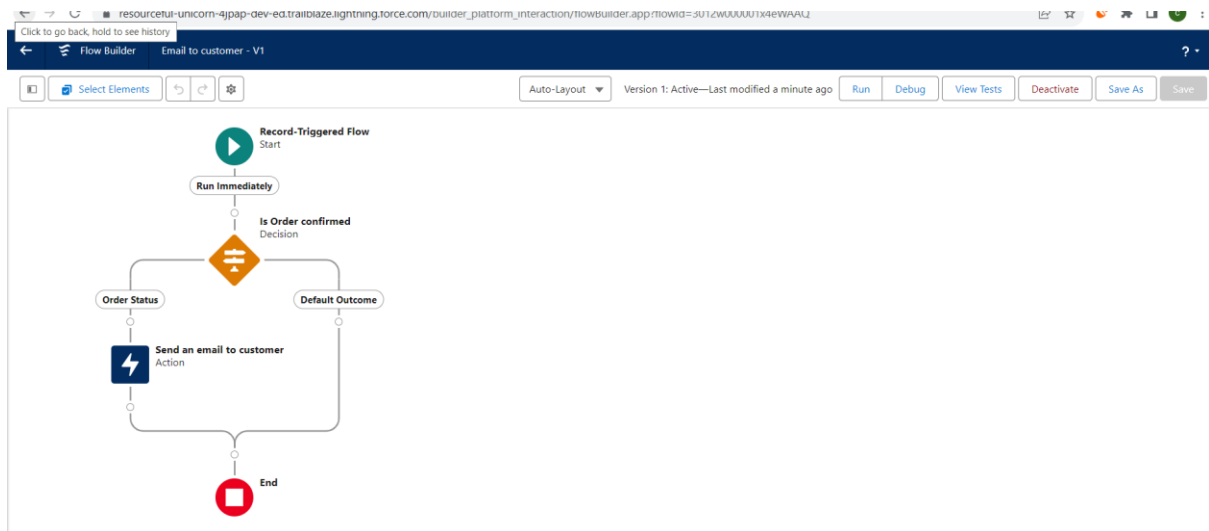
Create Flow



To Create Lightning Home Page

The screenshot shows the Salesforce Lightning Home Page for the 'Get Account & Contact' app. The top navigation bar includes the 'Sales App' tab and a search bar. The left sidebar contains a navigation menu with 'Home' selected, and other tabs like 'Campaigns', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Products', 'Warehouses', 'Sales orders', 'Dispatch/Trackings', 'Reports', and 'Dashboards'. The main content area displays a form titled 'Get Account & Contact'. The form has sections for 'Name' (First Name, Last Name), 'Email' (you@example.com), 'Phone', 'Address' (Street, City, State/Province, Zip/Postal Code, Country), and a 'Finish' button at the bottom right. The right side of the page features a blue background with a white pattern.

To Send An Email Alert To The Customer Once Order Is Confirmed & To Create Record Trigger Flow



Triggers

File Edit Debug Test Workspace Help < >

ToAvoidDuplicateHandler.apxc toavoidduplicates.apxt

Code Coverage: None API Version: 59

```
1 public class ToAvoidDuplicateHandler {
2
3
4
5     public static void preventDuplicate(list<Account> acclist){
6
7         for (Account a : acclist){
8
9             for (Account a1 : [Select id,name from Account]){
10
11                 if(a.name == a1.name){
12
13                     a.name.addError('This is a duplicate name');
14
15
16
17                 }
18
19             }
20         }
21     }
22 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

Name	Line	Problem
------	------	---------

ToAvoidDuplicateHandler.apxc

toavoidduplicates.apxt

Code Coverage: None API Version: 59

```
1
2 trigger toavoidduplicates on Account (before insert) {
3
4
5
6     if(trigger.isBefore){
7
8         ToAvoidDuplicateHandler.preventDuplicate(trigger.new);
9
10    }
11
12
13
14 }
15
```

