



BRAINPOP

SALESFORCE

Subscription

App



Prepared By,
Susan koudou



Table of Content

01

Application outline

2-6

Lighting app

6-7

Custom Object

8-9

Importing data

10-12

Creating Users &
Profiles

13-14

Creating and customize list
view

16-17

Customize object & layout page

18-22

Create look up & flow

22-23

Create report & email
notifications



Step 7: Create a custom tab and choose identification



New Custom Object Tab

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#).

Object: Subscription

Tab Style: Jewel

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: None

Enter a short description.

Description:

Select all and click next

Custom (standard)_Contents

Analytics Studio (standard)_Analytics

News (standard)_LightningLayout

News Console (standard)_LightningBaseConsole

Service Console (standard)_LightningServiceConsole

Lightning/Usage App (standard)_LightningUseApp

Digital Experience (standard)_SubactionsOverview

Commerce (standard)_Commerce

Mail Services (standard)_LightningMail

Data Manager (standard)_DataManager

My (standard)_My

Phone Log (PhoneLog)

Mobile Module (P)

Web Mail

Mobile Module (WebMail)

Mail app (standard)_Mail app subscriptions

Select tab to create using personal subscriptions

NEXT

Step 8: Now that we've created the custom object it's time to create a new field relationship



Fields & Relationships

5 Items, Sorted by Field Label

Quick Find

New Deleted Fields

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING I
Created By	CreatedById	Lookup(User)	
Currency	CurrencyIsoCode	Picklist	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	
Subscriptions Name	Name	Text(80)	

Step 9: Select a custom field, I selected text so users can easily find app

Save & click next

Relationships

- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)

Allows users to enter an email address, which is validated to an address when clicking Send an Email. Note that custom email addresses are not supported.

Allows users to define locations. Includes latitude and longitude.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number.

Allows users to enter any phone number.

Allows users to select a value from a list.

Allows users to select multiple values from a list.

Allows users to enter any combination of fields.

Allows users to enter up to 255 characters.

Allows users to enter up to 131,072 characters.

Allows users to enter formatted text, add links, and insert images.

New Custom Field

Step 4. Add to page layouts

Field Label: Payments

Field Type: Text

Field Name: Payments

Description: Payment tab

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of those page layouts. The field will not appear on layouts that do not have a 2-column section.

To change the location of this field on the page, you will need to customize the page layout.

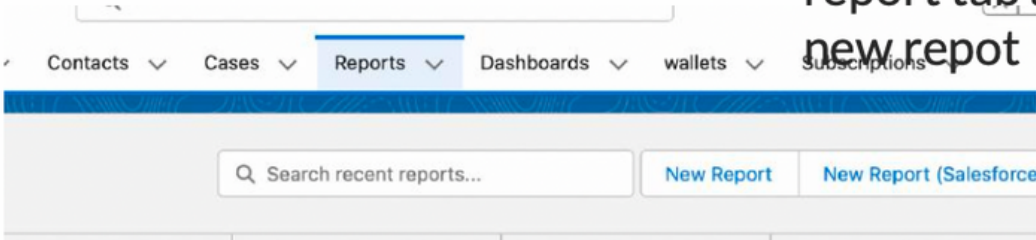
Add Field Page Layout Name

Subscription Layout

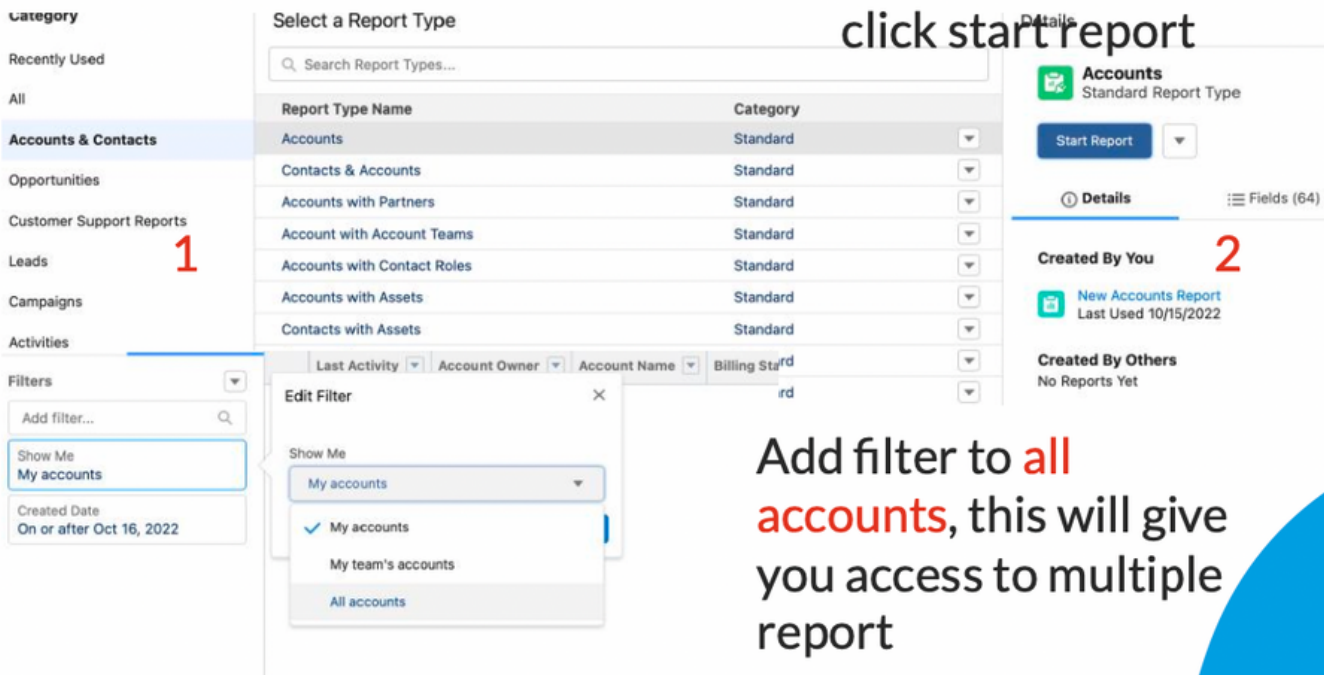
When finished, click Save & New to create more custom fields, or click Save if you are done.

Create a Report

Step 32: Go to the report tab and select new report



Step 33: Go to accounts and contact, click start report



Add filter to all accounts, this will give you access to multiple report

click run

