

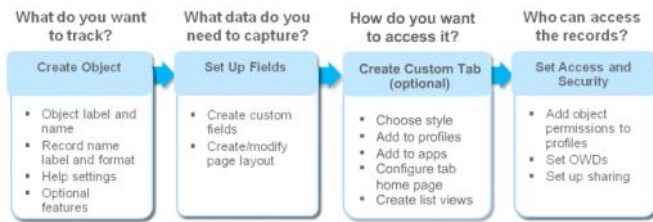
Extend Salesforce with Custom Objects and Apps

Friday, October 02, 2015 4:46 PM

Each custom app may contain custom object, related custom objects and custom tabs

When creating a custom object consider:

There are a number of steps to take when creating a custom object before it is ready for users.



Custom Object Tabs

Gives Custom object to have a home page. **Setup -> Create -> Tabs**

Custom Object Permissions

Users by default need a custom profile or permission sets to access a custom object.

Use role hierarchy, sharing rules, and manual sharing to grant additional access to records for custom objects.

Create a new custom Object:

Custom Object Relationships

- Built using a relationship field on a custom object to link it to a different object in a one-to-many relationship.
- The related list on the parent record displays the related child records.
- Setup -> Schema Builder
 - This allows you to create new custom objects and fields while simultaneously showing a graphic illustration of the objects in the organization and their relationship with each other.
- Determine a relationship type to determine how closely related records will be linked.
 - Master-detail Relationship
 - One-to-many relationship
 - Strong relationship where master records control certain behaviors of detail records.
 - Record access and ownership of detail records are controlled by master record.
 - Deleting the master record deletes the detail record.
 - Lookup Relationship
 - One-to-many relationship
 - Loose relationship where child records have their own security settings.

Who can view the detail/child records?

Master-Detail: Only users with access to the master record can view the related detail records. Detail objects inherit the default sharing setting of the master object. So, if the master object is private, the detail object will also be private.

Lookup: This depends on the detail object's default sharing setting. The child object has its own setting in the organization-wide defaults.

Who can create, edit, or delete the detail/child records?

Master-Detail: Any user with either Read or Read/Write access to the master record can create, edit, or delete detail records. Select the minimum access required to the master record while creating the relationship.

Lookup: This depends on the detail object's default sharing setting. The child object has its own setting in the organization-wide defaults.

Is it possible to use sharing rules and manual sharing to give access to detail/child rec...

Master-Detail: No, detail records are owned by the master record owner and sharing is based on ownership. Detail records have no Owner field, which means no sharing rules or manual sharing.

Lookup: Yes, child records can have different owners to the parent record, and can be shared.

Is it possible to create a relationship if detail/child records already exist?

Master-Detail: No, because existing records would not have master records.

Lookup: Yes, it is possible to create a relationship if child records already exist.

What happens to the related detail/child records when a master/parent record is delet...

Master-Detail: When a master record is deleted, the related detail records are also deleted. Detail records must always have a master record, because the master record controls their behavior. This is why the relationship field is a required field on the detail record.

Lookup: If you make the lookup field required, parent records cannot be deleted. If you make the lookup field optional, you can also select what will happen:

- Keep the child records, but clear the values in the lookup field (default).
- Delete the child records too (call salesforce.com to enable).
- Do not allow deletion of parent records in a lookup relationship.

Can the master/parent record of a detail/child record be changed?

Master-Detail: By default, detail records can't be reparented in master-detail relationships. However, administrators can allow detail records in master-detail relationships on custom objects to be reparented to different parent records by selecting the **Allow reparenting** option in the master-detail relationship definition.

Lookup: You can relate a child record to a different parent record.

- When reporting is enabled on a custom object, Salesforce creates a new report type to build reports on it.
- When relationships with other objects are created, Salesforce creates additional report types so that related records are included in the same report.

Master-Detail Relationship

The master object is the primary object

Lookup Relationship

The child object is the primary object

The primary object determines what object can be filtered.

The Primary Object is important because it determines what object can be filtered using the Show and Time Frame filters at the top of the report.

Cross-Object Formulas:

- Used to reference or display data from the parent, or its own parent objects.
- Able to access fields on the child record, the parent record, and the parent's parent record (up to 10 relationships away).
- Allows for the admin to easily display data on related records without needing users to manually enter the data multiple times.

Roll-Up Summary Field

- Can be created on the master object in a master-detail relationship to summarize numerical data on detail records and display it on the master record.

A roll-up summary field can be created on the master object in a master-detail relationship to summarize numerical data on detail records and display it on the master record.

Step 3. Define the summary calculation Step 3 of 5

Previous Next Cancel

Select Object to Summarize ! = Required Information

Master Object: Opportunity

Summarized Object: Shipments

Select Roll-Up Type

☐ COUNT

☒ SUM Field to Aggregate: Shipping Costs

☐ MIN

☐ MAX

Filter Criteria

☒ All records should be included in the calculation

☐ Only records meeting certain criteria should be included in the calculation

Showing Detail/Child Records on Related Lists

- When the relationship field is added to the detail object, you may choose to display the detail

records in a related list on the master opportunity record.

- On the object page layout, you may edit the detail object's related list to determine the fields to display

Junction Objects

- Used to link two objects together in a many-to-many relationship.
- Has a master-detail relationship with two objects, so junction records can be created to link two master records together by combining data from both.
- Visit "**Considerations for Relationships**" to learn more about the considerations for many-to-many relationships.

Custom Apps

Custom Apps are a grouping of tabs that give users access to just the objects, records, and features they need for a specific business function.

Creating a custom app:

Custom app wizard: Setup -> Create -> Apps -> New

Enter App Details

- Label
- Name
- Description

Add a Logo (optional)

- Select image from Documents tab

Choose Tabs

- Select standard or custom tabs
- Order tabs
- Select landing tab

Assign App to Profiles

- Select for which profiles app is visible
- Choose to set as default

Save Save As Close

Report Properties Add Report Type Run Report

Fields

Filters Add

Show All opportunities Opportunity Status Any Probability All

Date Field Close Date Range Current PQ From 10/1/2015 To 12/31/2015

To add items, click Add

Preview Summary Format Show Add Chart Remove All Columns

Opportunity Name: Shipments Test (2 Records) USD 200.00

Drop a field here to create a grouping. Hide

Shipment No.	Consignment No.	Courier	Dispatched	Shipping Cost	Status
SHIP-0001	-	-	10/6/2015 2:34 PM	USD 100.00	Dispatched
SHIP-0002	37485445	FedEx	10/6/2015 2:34 PM	USD 100.00	Dispatched
Grand Totals (2 records)				USD 200.00	

Delegated administration assigns limited administrative privileges to non-administrators.

Manage Users

For specified roles and subordinate roles delegated administrators can:

- Log in as users, reset passwords, and unlock users.
- Create and edit users.
- Assign users to specified profiles.

Manage Custom Objects

For specified custom objects delegated administrators can customize most aspects, including:

- Fields, page layouts and record types.
- Validation rules.
- Custom tabs.



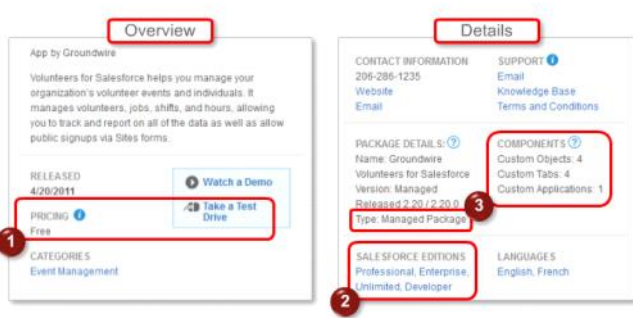
Setup | Security Controls | Delegated Administration

Creating a Delegated Group

A delegated group consists of 4 components:

- Delegated Administrators
 - Users that are authorized to act as administrators for the setup tasks associated with the group.
 - If a user is a member of more than one delegated administration group, they can assign any of the assignable profiles to any of the users in roles he or she can manage.
- User Administration
 - Roles and Subordinates that the delegated administrators can edit or create new users on.
 - Delegated admin can only create and edit users in the roles; they are NOT allowed to modify the role hierarchy.
- Assignable Profiles
 - Delegated admin can only assign users to profiles; they cannot modify the profile.
- Custom Object Administration
 - Delegated Admin can optimize nearly every aspect of the custom object, including creating a custom tab for it.
 - They cannot set organization-wide sharing defaults for the object.
 - If the delegated group contains more than one object, delegated administrators can create and modify relationships among those objects.

Using AppExchange to share and install apps.
Force.com Menu -> AppExchange



Make sure to select Security Levels for the App.

Setup -> System Overview

Schema	
CUSTOM OBJECTS i	<div><div></div></div> 3%(maximum 200)
6	
CUSTOM SETTINGS i	
0	
DATA STORAGE i	<div><div></div></div> 0%(maximum 1.0 GB)
4.4 MB (Approx.)	

Business Logic	
RULES	<div><div></div></div> 0%(maximum 2,000)
6	
APEX TRIGGERS	
3	
APEX CLASSES	
5	
CODE USED i	<div><div></div></div> 0%(6,979 of 3,000,000 characters)
0.23%	

Most Used Licenses		Show All
SALESFORCE	<div><div></div></div> 70%(maximum 55)	
39		
CHATTER FREE	<div><div></div></div> 0%(maximum 5,000)	
2		
CHATTER EXTERNAL	<div><div></div></div> 0%(maximum 500)	
0		

API Usage	
API REQUESTS, LAST 24 HOURS	<div><div></div></div> 0%(maximum 15,000)
0	

User Interface	
CUSTOM APPS	<div><div></div></div> 20%(maximum 10)
2	
ACTIVE FLOWS	<div><div></div></div> 0%(maximum 500)
0	
CUSTOM TABS	<div><div></div></div> 20%(maximum 25)
5	
VISUALFORCE PAGES	
2	