Salesforce Certified Admin and App Builder

Lesson 2—Salesforce Objects

What You'll Learn

- The difference between standard and custom objects.

- Renaming objects.

- Using external objects with standard objects.

- When to create custom objects.

Standard Object Components

Standard Object Components

Remember the following points when understanding standard components:

- Standard objects have a variety of options, called components.

- All components relate directly to the standard object, but can reference others.

- Some areas such as Limits are for viewing object limitations.

Contacts
- Fields
- Related Lookup Filters
- Validation Rules
- Triggers
- Page Layouts
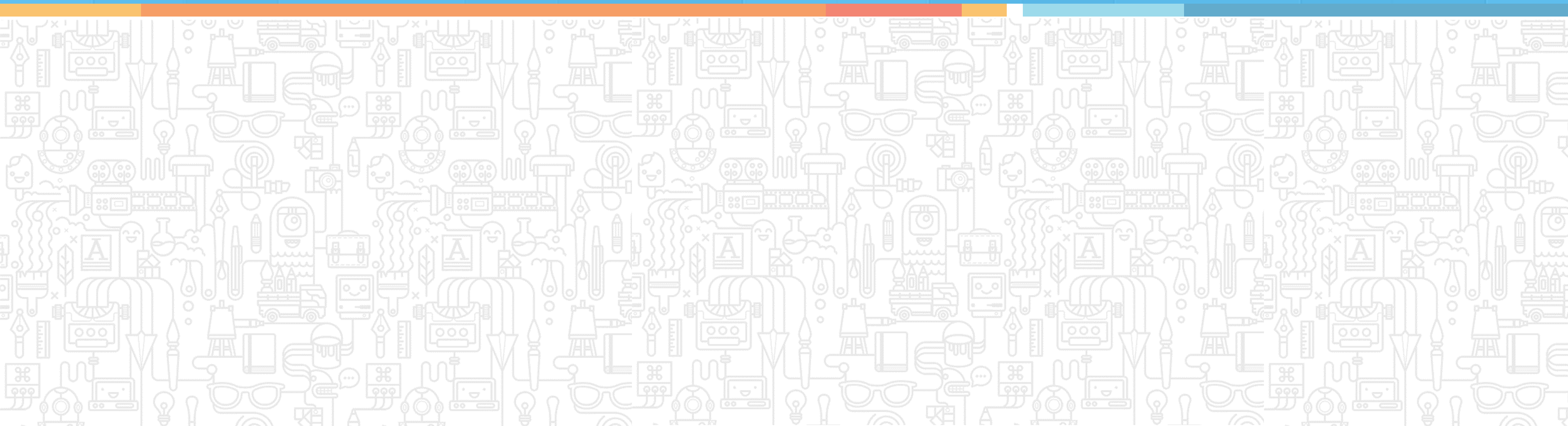- Field Sets
- Compact Layouts
- Search Layouts
- Buttons, Links, and Actions
- Record Types
- Limits

Renaming Standard Objects

Keep in mind the following points when renaming objects:

- Most standard objects can be renamed to better suit the business use case. For example, Accounts can be changed to Organizations.

- Object renaming should still fit within the overall schema.

Build

▼ **Customize**

　▼ **Tab Names and Labels**

　　Rename Tabs and Labels

　　Help Settings

Modifying Standard Objects

Modifying Standard Objects

Keep in mind the following points when modifying standard objects:

- Standard fields such as picklists can be modified.

- Help bubbles can be filled in for standard fields.

- Descriptions and field-level security can be modified.

Field Information

Field Label	Lead Source
Data Type	Picklist
Help Text	

Account/Lead Source Picklist Values   [New] [Reorder] [Replace]

Action	Values	Default	Chart Colors
Edit	Del	Advertisement		Assigned dynamically
Edit	Del	Employee Referral		Assigned dynamically
Edit	Del	External Referral		Assigned dynamically
Edit	Del	Partner		Assigned dynamically

Understanding External Objects

Understanding External Objects

Remember the following about creating external objects:

- External objects are used to map to outside data sources.

- The most common use case is to pull in data from another database into Salesforce.

- Although the data is spread across multiple locations, users are able to access it from a single location.

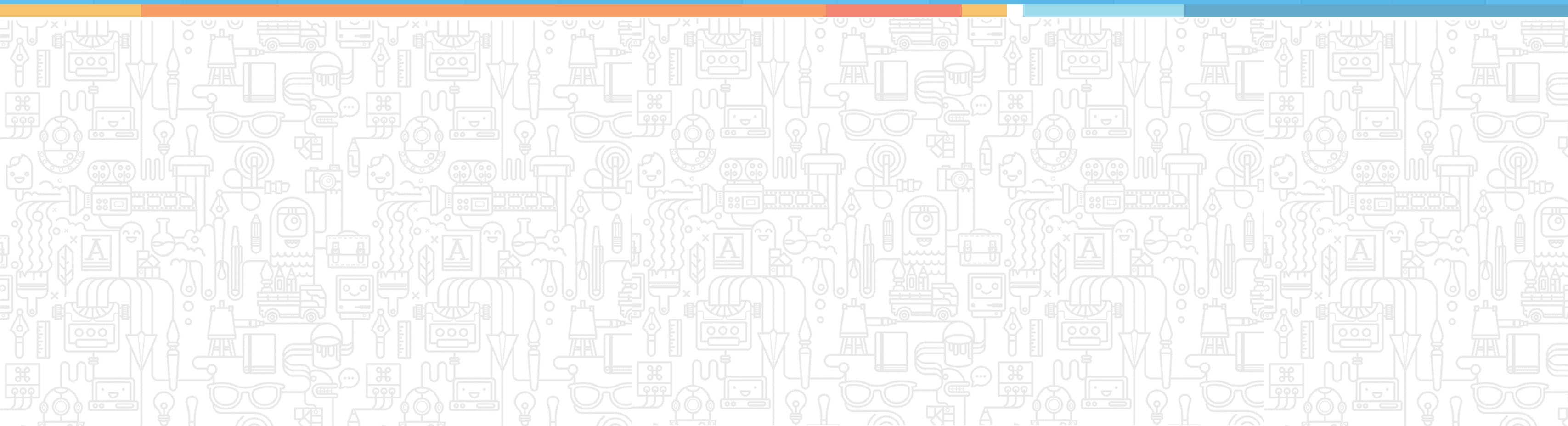- Typically one external object is mapped to one data table in the outside database.

Creating Custom Objects

Keep the following points in mind when creating custom objects:

- Custom objects extend Salesforce's capabilities through the creation of additional features.

- New applications can be created, such as human resources or financial management.

- Creating custom objects are identical to creating new database tables.

- Most custom objects have tabs created along with them.

Custom Object Information

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

Label	Invoice	Example: Account
Plural Label	Invoices	Example: Accounts
Starts with vowel sound	☑	

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

Object Name	Invoice	Example: Account

Quiz

QUIZ 1

What is the primary purpose of custom objects?

a. To run reports and dashboards

b. To integrate with external databases

c. To extend the features of Salesforce

d. To import data

QUIZ 1

What is the primary purpose of custom objects?

a.   To run reports and dashboards

b.   To integrate with external databases

c.   To extend the features of Salesforce

d.   To import data

The correct answer is c.

Custom objects are used to add additional features to Salesforce.

QUIZ 2

What can be modified on standard objects and fields?

a. Tab and field name

b. Field type and location

c. Workflow Rules

d. Reports and Dashboards

QUIZ 2

What can be modified on standard objects and fields?

a. Tab and field name

b. Field type and location

c. Workflow Rules

d. Reports and Dashboards

The correct answer is **a**.

You can rename tabs and fields on standard objects.

QUIZ 3

Where in Salesforce do you generate a new custom object in setup?

a. Administer Menu

b. Customize Menu

c. Create Menu

d. Develop Menu

QUIZ 3

Where in Salesforce do you generate a new custom object in setup?

a. Administer Menu

b. Customize Menu

c. Create Menu

d. Develop Menu

The correct answer is **c**.

Create menu facilitates creation of a new custom object.

QUIZ 4

Which fields can be edited on standard objects?

a. Help bubble

b. Field type

c. Field name

d. API Name

QUIZ 4

Which fields can be edited on standard objects?

a.   Help bubble

b.   Field type

c.   Field name

d.   API Name

The correct answer is **a**.

Only the help bubble text can be modified.

QUIZ 5

What objects should be created to integrate with external data?

a. Custom objects

b. Standard objects

c. External objects

d. Database objects

QUIZ 5

What objects should be created to integrate with external data?

a. Custom objects

b. Standard objects

c. External objects

d. Database objects

The correct answer is **c**.

External objects should be created to integrate with outside sources.

Case Study

Scenario | Analysis | Solution

United Containers is looking for a way to track potential employees in Salesforce. The contact standard object isn't set up properly for this use case. United Containers is struggling to keep resumes and other applicant information organized.

*Click **Analysis** to know the team's next move.*

Scenario **Analysis** **Solution**

United Containers decided to create a custom object named Candidates for the following reasons:

1. Custom objects can be used along with Force.com licenses.

2. A custom human resources app can be created to include the Candidates custom object.

3. Custom objects are Chatter-compatible and Salesforce1 capable.

Click **Solution** *to know the company's decision.*

Case Study

Scenario Analysis Solution

System Administrator of United Containers took the following steps to create this new custom object:

1. Logged into Salesforce, navigated to Setup.

2. Navigated to Create, then Objects.

3. Clicked New Custom Object and named it Candidates.

4. Made the new custom object visible to users in human resources.

Proceed forward to view the demo.

- External objects can be used to pull in data.

- Standard objects can be modified with different names and help texts.

- Custom objects give app builders the ability to extend the usefulness of Salesforce.

This concludes 'Salesforce Objects.'

The next Lesson is 'Creating Buttons, Links, and Actions.'