Salesforce Certified Admin and App Builder

Lesson 25—Other Important Concepts

What You'll Learn

- Features of SalesforceA

- Benefits of Salesforce and Outlook connection

- Many-to-many relationship

- Self relationship

- Hierarchy Relationship

SalesforceA

SalesforceA is an application that was launched by Salesforce in 2013. It enables Salesforce admins to manage users and view information on mobile devices. You can download the app for iPhone as well as Android devices.

However, there is no way to swap between multiple organizations. In this case, you have to log out and log in with a different username.

An administrator can perform the following using SalesforceA:

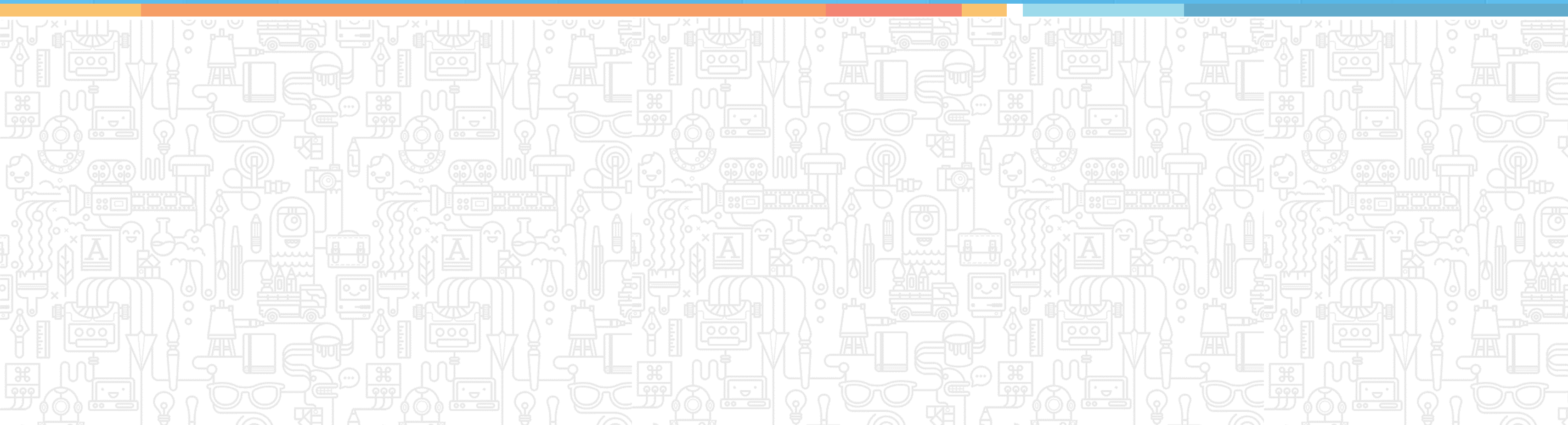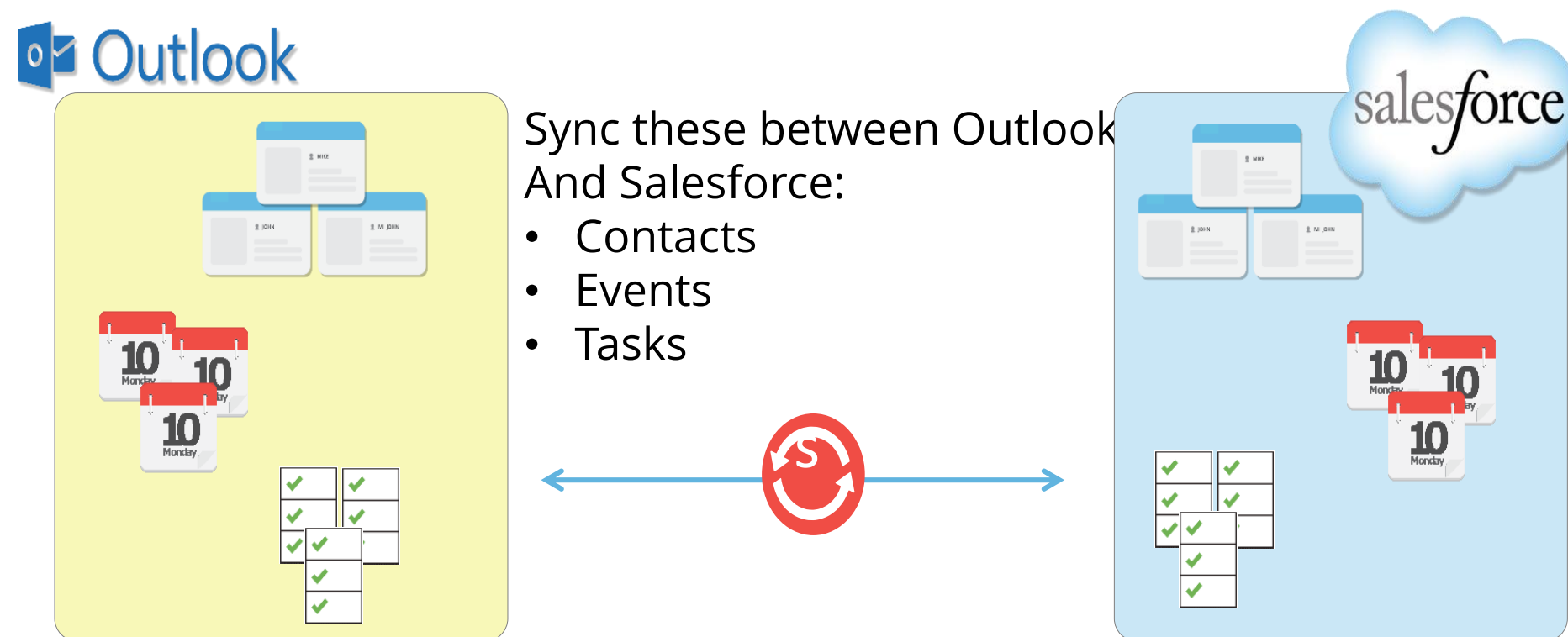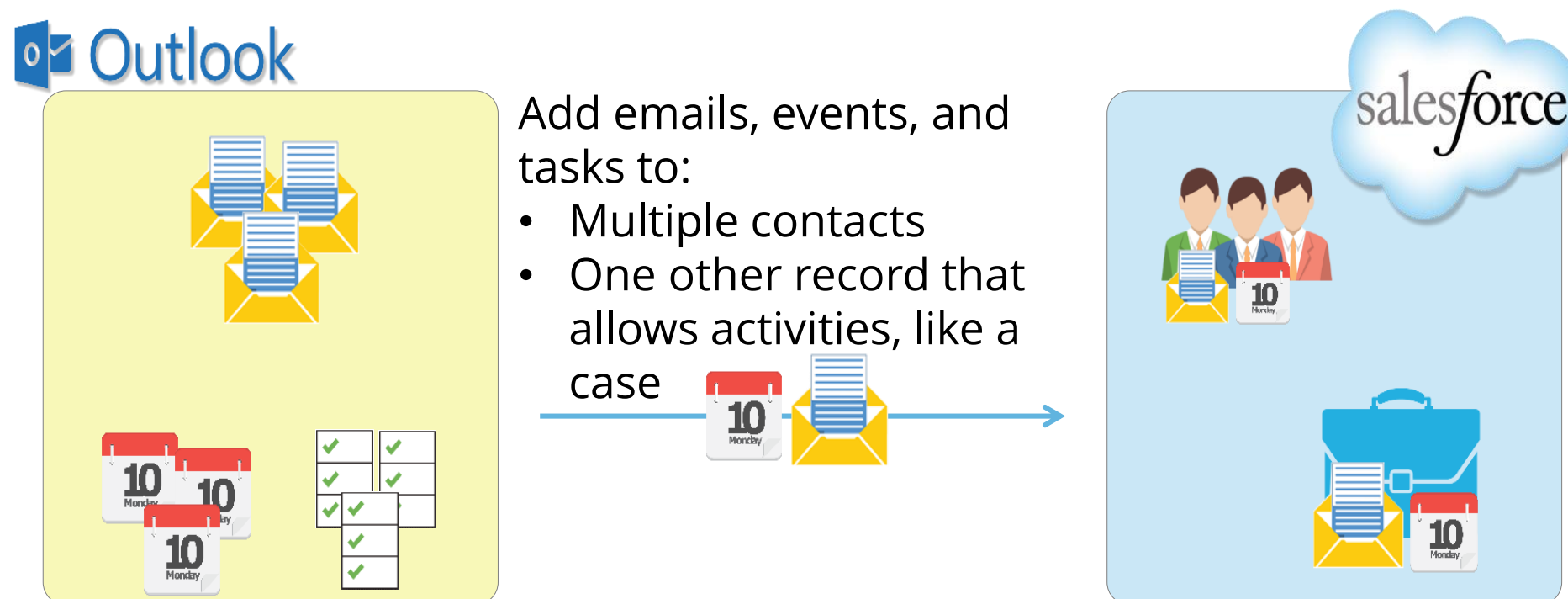| Freeze a user's action | Unlock a user's account | Deactivate a user's account | Edit a user's account | Reset password |

Salesforce and Outlook

➢ It is possible to integrate Microsoft Outlook with Salesforce using an installable integration application. This is fully supported by Salesforce.

➢ This will automatically sync contacts, events, and tasks between Outlook and Salesforce.

➢ It will also allow a user to manually add Outlook emails to Salesforce records such as Contacts, Leads, and Opportunities.

Sync these between Outlook
And Salesforce:
• Contacts
• Events
• Tasks

➢ To enable the integration, System Administrator needs to create at least one Outlook configuration.

➢ An Outlook configuration determines the records to be synced and the synchronization direction.

➢ This doesn't truly sync email. Email is added either manually or using Email-to-Salesforce behind the scenes.

➢ Synced items appear in the My Unresolved Items area.

Add emails, events, and tasks to:
• Multiple contacts
• One other record that allows activities, like a case
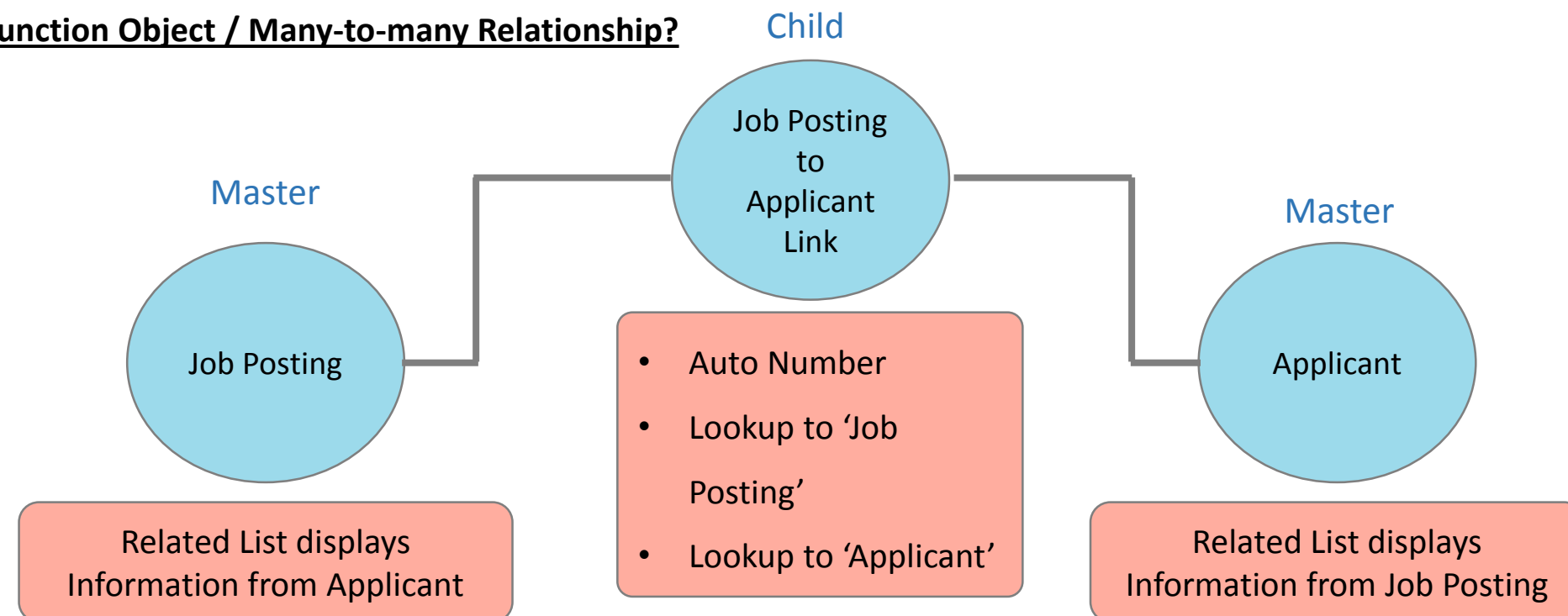
Many-to-Many Relationship

You can use master-detail relationships to form many-to-many relationships between any two objects.

A many-to-many relationship allows each record of one object to be linked to multiple records from another object and vice versa.

Many-to-Many Relationship—Example

You may have a custom object called "Issue" that relates to the standard case object. "Issue" could be related to multiple cases and a case can be in turn related to multiple bugs. To create a many-to-many relationship, you need to create a custom junction object with two master-detail relationship fields. Each of these will be linked to the objects you want to relate. Starting in API version 34.0, the JunctionIdList field type lets you manipulate the many-to-many relationship of an entity directly. You no longer need to manipulate the underlying junction entity records.

Many-to-Many Relationship—Example (contd.)

JunctionIdList fields can be queried and updated like any other field on the entity. Queries or updates to JunctionIdList fields act as queries or updates to the underlying junction entity records. Cases could also be related to multiple issues.

How to create a Junction Object / Many-to-many Relationship?

Child

Job Posting to Applicant Link

Master

Job Posting

Master

Applicant

- Auto Number
- Lookup to 'Job Posting'
- Lookup to 'Applicant'

Related List displays Information from Applicant

Related List displays Information from Job Posting

Self Relationship

When an object has a lookup with itself, it is a self-relationship. A self relationship creates a tree diagram of the objects. For example, the account has a lookup on itself called Parent Account. The hierarchical relationship is a self relationship of the user object. Difference between Self and Hierarchical relationships:

Self Relationship	Hierarchical Relationship
Self relationship can be implemented on any object	Hierarchical relationship is implemented only on User object

Hierarchy Relationship

Hierarchy Relationship

Hierarchical relationship is a special lookup relationship available only for the user object. It allows users to use a lookup field to associate one user with another that does not directly or indirectly refer to itself. For example, you can create a custom hierarchical relationship field to store each user's direct manager.

Quiz

QUIZ 1

How many objects are needed for many-to-many relationship?

a. 1

b. 2

c. 3

d. 4

QUIZ 1

How many objects are needed for many-to-many relationship?

a. 1

b. 2

c. 3

d. 4

The correct answer is **c**.

For many-to-many relationship three objects are required.

QUIZ 2

Which app is used by Salesforce Admins?

a. Salesforce1

b. SalesforceA

c. SalesforceB

d. Salesforce2

QUIZ 2

Which app is used by Salesforce Admins?

a. Salesforce1

b. SalesforceA

c. SalesforceB

d. Salesforce2

The correct answer is **b**.

Salesforce Admins use SalesforceA.

Key Takeaways

- SalesforceA enables Salesforce admins to manage users and view information on mobile devices

- It is possible to integrate Microsoft Outlook with Salesforce using an installable integration application

- A many-to-many relationship allows each record of one object to be linked to multiple records from another object and vice versa

- When an object has a lookup with itself, it is a self-relationship

- Hierarchical relationship is a special lookup relationship available only for the user object

Thank You