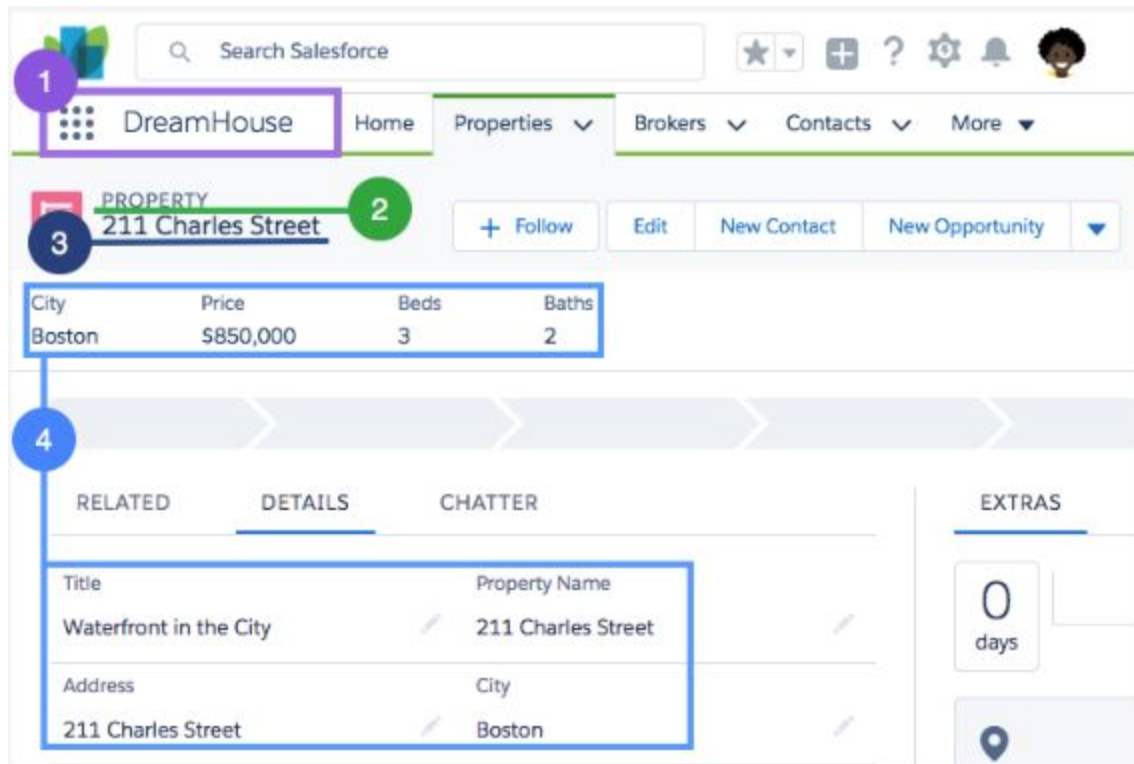


# Salesforce Platform Basics



## How Salesforce defines a database

1. An app is a set of objects, fields, and other functionality that support a business process.
  2. Objects are the same as relations and are either standard or custom.
  3. Records are the tuples inside the objects.
  4. Fields are the same as fields inside regular databases, ie columns inside the relation.
- An org (not pictured) refers to a specific instance of Salesforce.

## Declarative vs Programmatic development

Declarative means developing without code, while programmatic uses code.

# Setup

Setup menu gives you quick links to a collection of pages used for org management

## Administration

Where you manage users and data

### Users

#### **Profiles**

Manage who can see what, create custom profiles

#### **Users**

Reset passwords, create new users and deactivate/freeze existing users, view info about users

## Platform Tools

View and manage data model, create apps, modify user interface, and deploy new features. This is also where code is managed

### Apps

#### **AppExchange Marketplace**

Find and download Apps to incorporate into org

#### **Installed Packages**

Allows you to view Apps downloaded from the exchange and uninstall

## Settings

Where you manage your company information and org security

### Company Settings

#### **Company Information**

At a glance view of org, find org ID, see licensing info, monitor limits such as data limits and file usage

### Identity

#### **Login History**

View six months of login history (date, time, user, IP, etc)

## Security

### **View Setup Audit Trail**

View six months of change history in org, including who made changes

# Setup->Object Manager Functions

Object Manager is where you can view/customize standard and custom objects in org

## **Creating a new object**

To create a new object click on Object Manager and then the “Create” dropdown in the upper right hand corner.

## Fields & Relationships

### **Create New**

Select New within the Fields & Relationships tab. Choose the data type and give it a name. Save the field.

### **Lookup Relationship**

Links two objects together where you can “look up” one object from the related items on another object.

### **Master-Detail Relationship**

Establishes a parent-child relationship between object and another object, thereby deleting the parent records if the master record is deleted