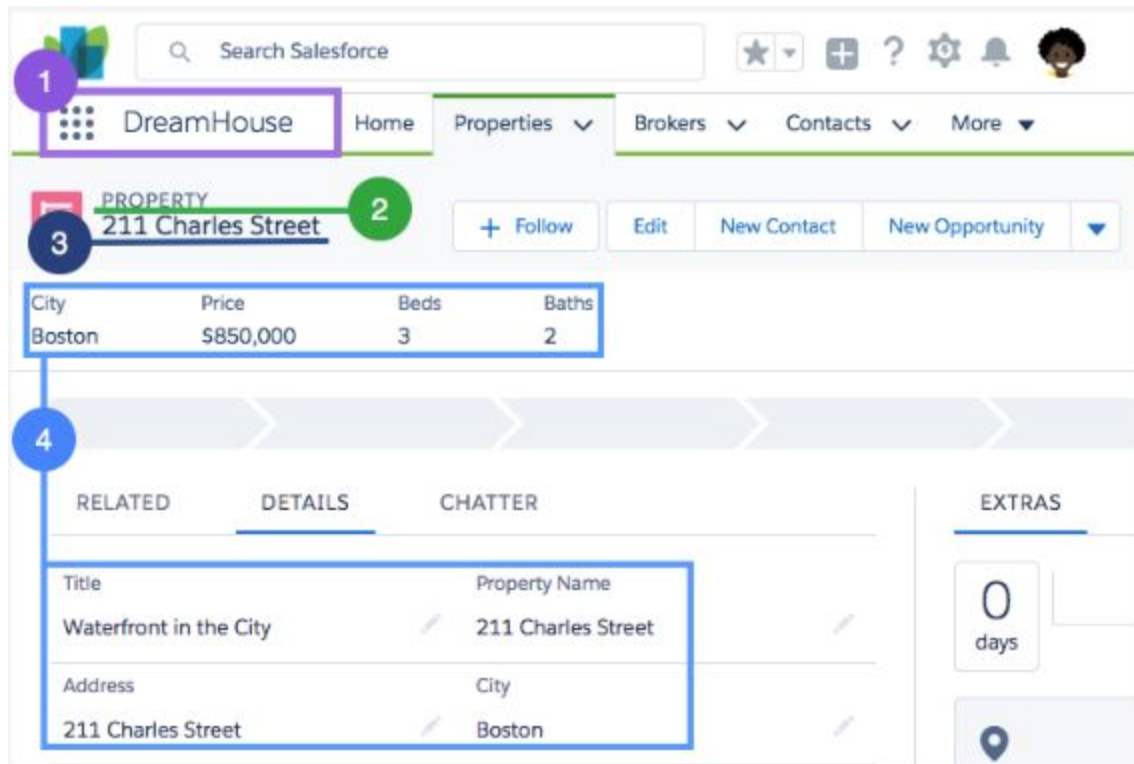


Salesforce Platform Basics



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