



- Salesforce has two ways to create an application—using point-and-click methods or by using the command line. The GUI method of application developing an application :

## **Create an Account :**

- The first step is to create your Salesforce account. This is a fairly straightforward affair and it's something you've probably already done on dozens of web sites.
- You need to go to <http://developer.force.com/join>. Simply follow the steps (you'll need to answer name, password, username, and so forth) and you'll be set up.
- Once you log in to your Developer Edition organization, then log in to <https://login.salesforce.com>.

## **Create an Object :**

- The next step is to create an object that will hold the data—our lunch expenses. Salesforce applications already contain a lot of prebuilt object called standard object for the data your applications need.
- However, you can build custom applications. Those are called custom objects.



- To create the object, log in to your Salesforce account at <https://login.salesforce.com> and enter your username and password. create the custom object by following these steps:
- Select Setup in the upper-right corner of the page.
- Click Create Objects in the sidebar menu to show the Custom Objects page.
- Fill in the custom object definition. This is shown in Figure 11-5:
- Under Label, enter Lunch.
- Under Plural Label, enter Lunch.
- Under the Object Name, enter Lunch.
- Under the Description, enter Anobjectthatholdslunchexpenseinformation.
- Select the Allow Activities check box.
- Select the Allow Reports check box.
- Leave all the other values at their default levels.
- Click Save to finish the custom object creation.



The screenshot shows the Salesforce Developer Edition setup page in a web browser. The browser's address bar displays the URL: `https://na6.salesforce.com/ui/setup/Setup?setupid=DevTools&page=Setup&retUR`. The page header includes the Salesforce logo, navigation links (Setup, System Log, Help, Logout), and a search bar. The main content area is divided into a left sidebar and a main panel. The sidebar contains sections for Personal Setup, App Setup, and Administration Setup, each with a list of sub-items. The main panel features a 'Create' section with a list of links for managing custom apps, report types, tabs, objects, workflow rules, and approval processes. Below this is a 'Getting Started' section with links for building custom apps, objects, tabs, and related lists, publishing apps, and tips & hints for workflow. The footer of the page includes links for Home, Start Here, All Tabs, and a copyright notice for 2000-2008 Salesforce.com, Inc.

Create – Salesforce – Developer Edition

Setup • System Log • Help • Logout

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**Create**

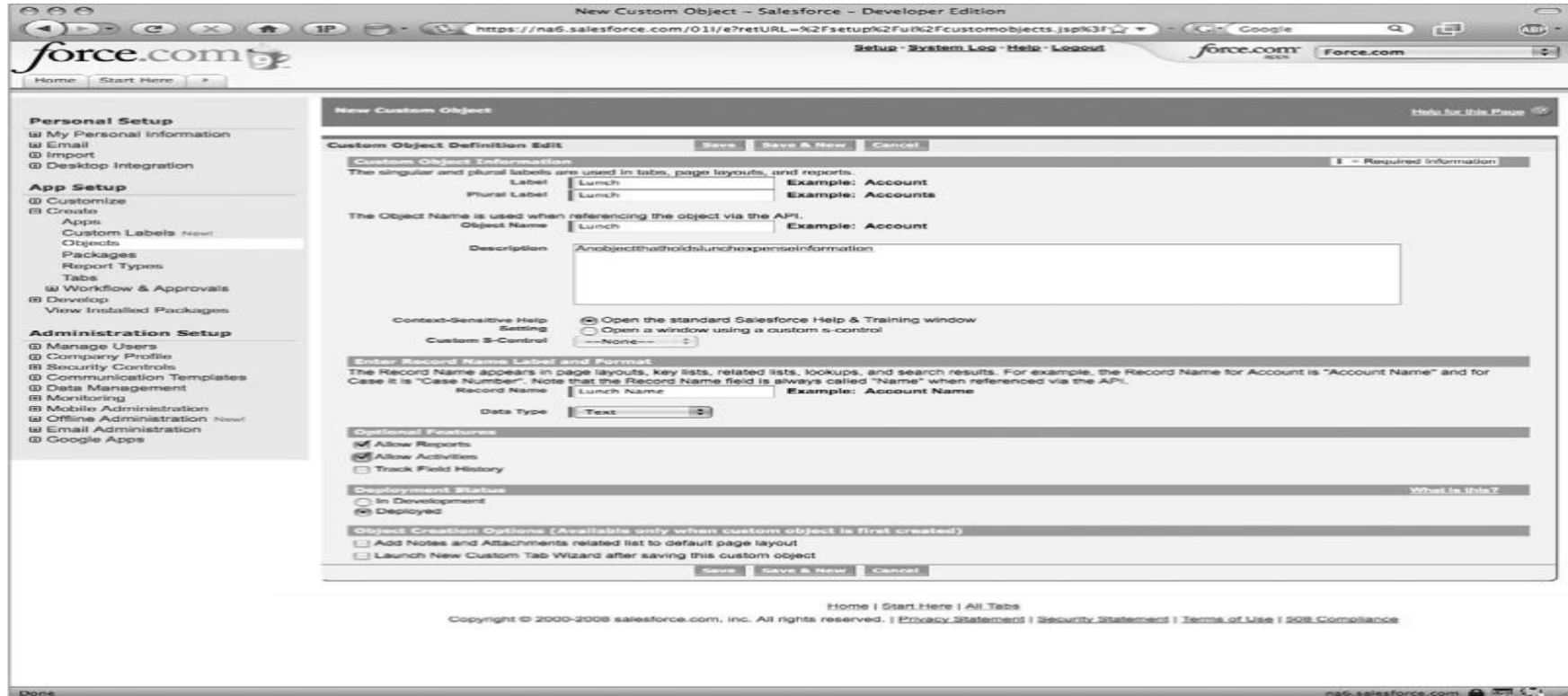
- Manage your custom apps
- Manage Custom Labels and their translations for use in Visualforce pages and Apex code
- Manage your custom objects
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- Manage your custom report types
- Manage your custom tabs
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**Getting Started**

- Building Custom Apps
- Building Custom Objects, Tabs, and Related Lists
- Publishing Apps on Force.com AppExchange
- Tips & Hints for Workflow

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New Custom Object – Salesforce – Developer Edition

https://na6.salesforce.com/011/e?retURL=%2Fsetup%2Fu%2Fcustomobjects.jsp%3f... Google

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**New Custom Object** Help for this Page

**Custom Object Definition Edit** Save Save & New Cancel

**Custom Object Information** Required Information

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

Label  Example: Account

Plural Label  Example: Accounts

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

Object Name  Example: Account

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce Help & Training window ☐ Open a window using a custom s-control

**Enter Record Name, Label, and Format**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name  Example: Account Name

Date Type

**Optional Features**

- ☒ Allow Reports
- ☒ Allow Activities
- ☐ Track Field History

**Deployment Status** What is this?

- ☐ In Development
- ☒ Deployed

**Object Creation Options (Available only when custom object is first created)**

- ☐ Add Notes and Attachments related list to default page layout
- ☐ Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

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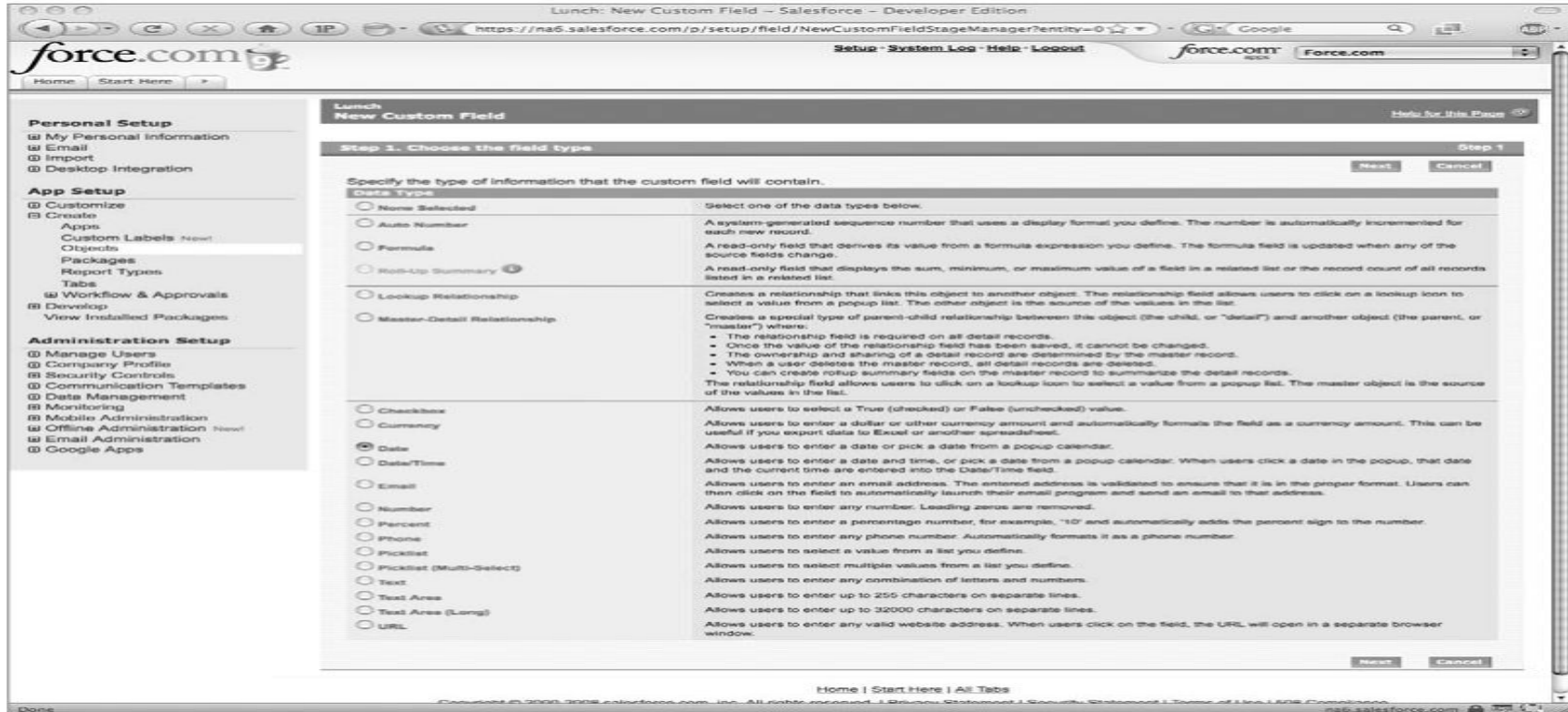
Done na6.salesforce.com

**FIGURE 11-5** Start creating your app by defining a custom object.



## Fields :

- After the custom object is made to hold your lunch expenses, the next step is to add fields that capture the date of your business lunch, how much you spent, and the person you entertained.
- **Date First, create the Date field (shown in Figure 11-6):**
- Scroll down to the Custom Fields & Relationships related list.
- Select New to start the New Custom Field Wizard.
- Under Data Type, select Date and click Next
- **Enter the following data (shown in Figure 11-7):**
- Under Field Label, enter Date.
- Under Field Name, enter Date.
- Under the Description, enter Dateoflunch.
- Check the Required check box.
- For the Default Value, enter Today().
- Click Next, accept the defaults, and click Next again.
- Click Save & New to create the Date field and to restart the wizard for the next field



**FIGURE 11-6** A key piece of data to be tracked by this app is the date.



Lunch: New Custom Field – Salesforce – Developer Edition

https://na6.salesforce.com/p/setup/field/NewCustomFieldStageManager

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**Lunch**  
**New Custom Field**

Help for this Page

**Step 2: Enter the details** Step 2 of 4

Previous Next Cancel

Field Label

Field Name

Description

Help Text

Required ☒ Always require a value in this field in order to save a record

Default Value [Show Formula Editor](#)  
  
Use formula syntax, e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7

Previous Next Cancel

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**FIGURE 11-7** When filled, the values in the Date field should look like this.



- **Cost** The next field to generate is the Cost field. This is where the cost of your business lunch is stored. The wizard was automatically restarted in the previous section.
- For the Data Type, select Number (shown in Figure 11-8).
- Fill in the fields as follows (shown in Figure 11-9):
  1. Under Field Label, enter Cost.
  2. For the Length, enter 4.
  3. Under Decimal Places, enter 2.
  4. For the Field Name, enter Cost.
  5. For the Description, enter Costoflunch.
  6. Check the Required check box.
  7. Click Next, accept the defaults, and click Save & New to create the next field.



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**Lunch: New Custom Field**

Help for this Page

**Step 1. Choose the field type**

Specify the type of information that the custom field will contain.

Next Cancel

| Choose a type                                    | Select one of the data types below.  |
|--|--|
| <input type="radio"/> None Selected              |  |
| <input type="radio"/> Auto Number                | A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.   |
| <input type="radio"/> Formula                    | A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.  |
| <input type="radio"/> Roll-Up Summary            | A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.   |
| <input type="radio"/> Lookup Relationship        | Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.  |
| <input type="radio"/> Master-Detail Relationship | Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where: <ul style="list-style-type: none"> <li>The relationship type is required on all detail records.</li> <li>Once the value of the relationship field has been saved, it cannot be changed.</li> <li>The ownership and sharing of a detail record are determined by the master record.</li> <li>When a user deletes the master record, all detail records are deleted.</li> <li>You can create rollup summary fields on the master record to summarize the detail records.</li> </ul> The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list. |
| <input type="radio"/> Checkbox                   | Allows users to select a True (checked) or False (unchecked) value.  |
| <input type="radio"/> Currency                   | Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.   |
| <input type="radio"/> Date                       | Allows users to enter a date or pick a date from a popup calendar.   |
| <input type="radio"/> Date/Time                  | Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the popup, that date and the current time are entered into the Date/Time field.  |
| <input type="radio"/> Email                      | Allows users to enter an email address. The entered address is validated to ensure that it is in the proper format. Users can then click on the field to automatically launch their email program and send an email to that address.   |
| <input checked="" type="radio"/> Number          | Allows users to enter any number. Leading zeros are removed.   |
| <input type="radio"/> Percent                    | Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.  |
| <input type="radio"/> Phone                      | Allows users to enter any phone number. Automatically formats it as a phone number.  |
| <input type="radio"/> Picklist                   | Allows users to select a value from a list you define.   |
| <input type="radio"/> Picklist (Multi-Select)    | Allows users to select multiple values from a list you define.   |
| <input type="radio"/> Text                       | Allows users to enter any combination of letters and numbers.  |
| <input type="radio"/> Text Area                  | Allows users to enter up to 255 characters on separate lines.  |
| <input type="radio"/> Text Area (Long)           | Allows users to enter up to 32000 characters on separate lines.  |
| <input type="radio"/> URL                        | Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.  |

Next Cancel

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**FIGURE 11-8** The next field to define is the Cost field.



Lunch: New Custom Field -- Salesforce -- Developer Edition

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**Lunch**

**New Custom Field**

Help for this Page

**Step 2. Enter the details**

Step 2 of 4

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Field Label

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length  Decimal Places

Number of digits to the left of the decimal point

Number of digits to the right of the decimal point

Field Name

Description

Help Text

Required ☒ Always require a value in this field in order to save a record

Unique ☐ Do not allow duplicate values

External ID ☐ Set this field as the unique record identifier from an external system

Default Value

Use formula syntax, e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.15, Date expression: Today() + 7

Previous Next Cancel

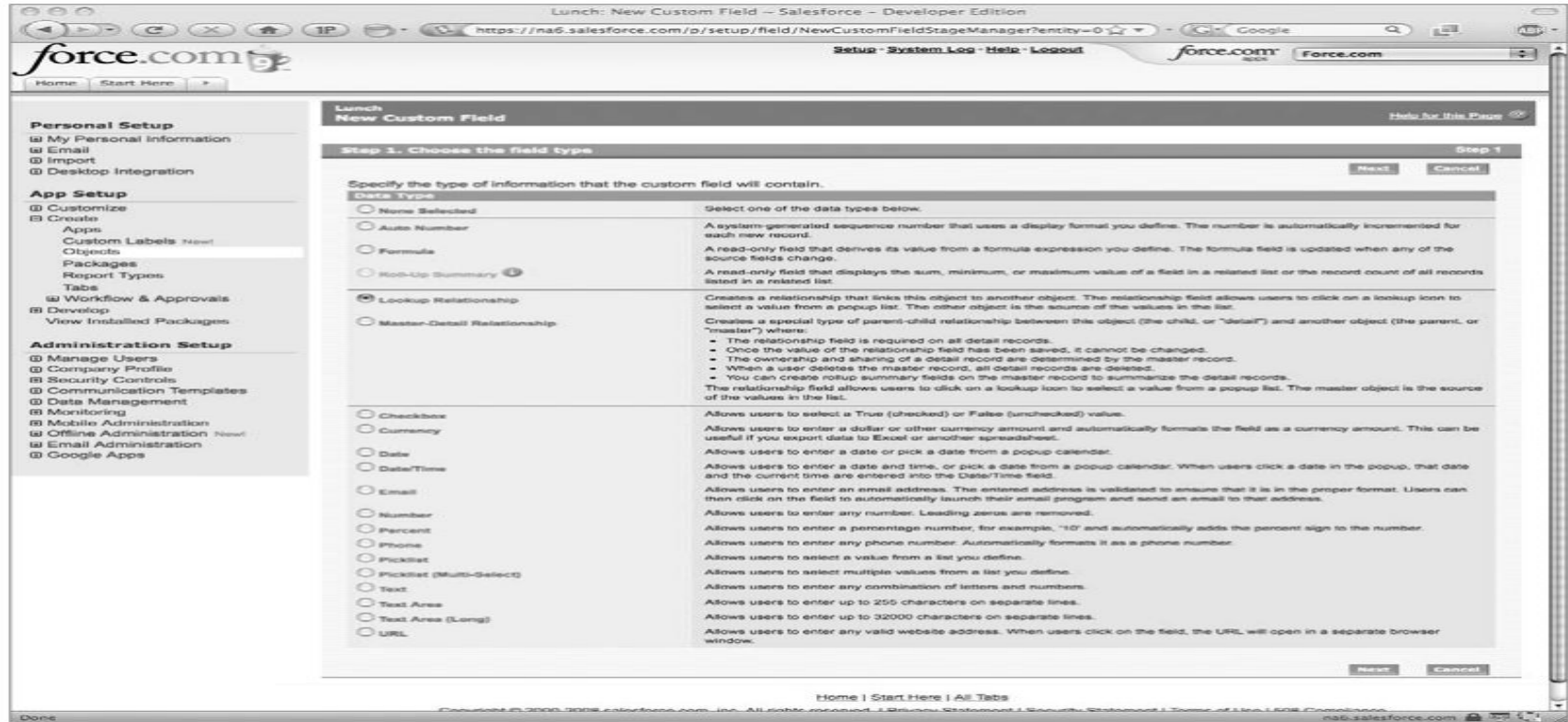
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**FIGURE 11-9** When filled, information in your Cost field will look like this.



**FIGURE 11-10** Selecting the Lookup Relationship data type allows you to link data for two objects.



- **Contact** The next field is the Contact field. This is the person with whom you had your business lunch. Again, if you clicked Save & New in the previous section, the field wizard restarts.
- For the Data Type, select Lookup Relationship (shown in Figure 11-10) and click Next.
- The Lookup Relationship data type allows you to link two data objects. In this example, we'll connect the Cost object and the Contact object.
- In the Related To drop-down list, select Contact and click Next.
- Fill in the field details as follows (shown in Figure 11-11):
  1. Under Field Label, enter Contact.
  2. Under Field Name, enter Contact.
  3. Under Description, enter PersonIhadlunchwith.
  4. Leave the remaining defaults as they are, and then click Next.
  5. Accept the defaults again and click Next.
  6. Click Next two more times.
  7. Click Save to finish up the field creation process.



## Create a Tab :

- To show your application on the Salesforce web site, you need to create a tab to be added to the existing tabs. When users click this tab, they'll be able to track their lunch expenses.
- 1. On the startup page, click Create Tabs (this was the same screen where you created the object).
- 2. Click New in the Custom Objects tab list to launch the New Custom Tab wizard.
- 3. From the Object drop-down list, select Lunch.
- 4. For the Tab Style, click the lookup icon and select the apple, shown in Figure 11-12 (it was our only food option).
- 5. Accept the remaining defaults and click Next.
- 6. Click Next and then Save to finish creating the tab.
- 7. Once the tab has been created, it is added to your set of tabs

A screenshot of the Salesforce.com Developer Edition web interface. The browser window title is 'Lunch: New Relationship -- Salesforce -- Developer Edition'. The address bar shows 'https://na6.salesforce.com/p/setup/field/NewCustomFieldStageManager'. The page has a navigation bar with 'force.com' logo, 'Setup', 'System Log', 'Help', and 'Logout'. Below the navigation bar is a sidebar with a tree view containing 'Personal Setup', 'App Setup', and 'Administration Setup'. The main content area is titled 'Lunch New Relationship' and shows 'Step 3 of 6: Enter the label and name for lookup field'. The form has four fields: 'Field Label' (value: Contact), 'Field Name' (value: Contact), 'Description' (value: Personihadi lunchwith), and 'Help Text' (empty). There are 'Previous', 'Next', and 'Cancel' buttons at the bottom right of the form. The footer contains copyright information and links to 'Privacy Statement', 'Security Statement', 'Terms of Use', and '508 Compliance'.

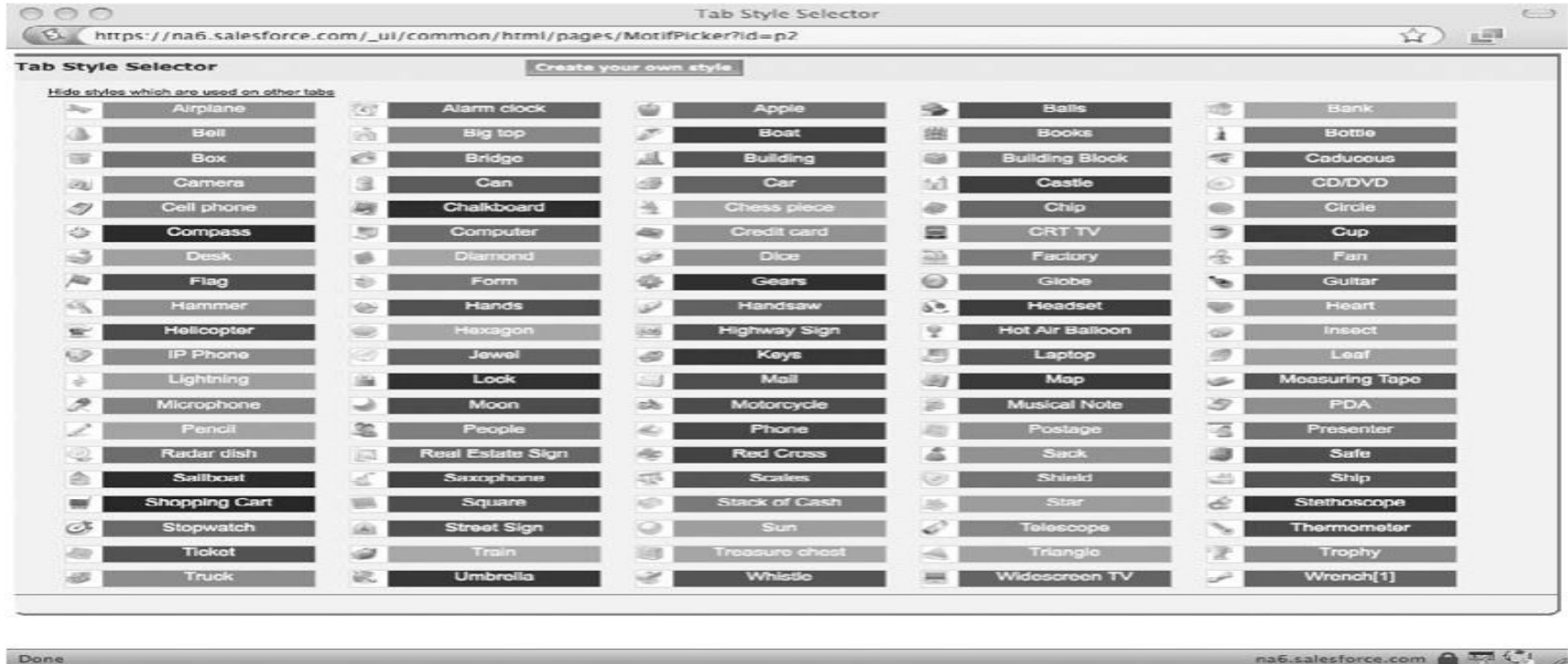
**FIGURE 11-11** The Contacts field should be configured to look like this.



## Make the App

- At this point, we have created three fields and a tab. These are all pulled together to create our app. You make the app by following these steps:
- 1. Go to Setup Create Apps.
- 2. Click New to launch the New Custom App Wizard.
- Enter the following details (shown in Figure 11-13):
  - 1. Under App Label, enter Lunch Tracker.
  - 2. Under the App Name, enter Lunch\_Tracker
  - 3. Under the Description, enter Thisapplicationtracksyourlunchexpenses.
  - 4. Click Next.
- 5. Accept the defaults and the default logo for the app, and then click Next.
- 6. In the Available Tabs box, locate the Lunch tab and click Add to add it to the selected tabs.
- 7. Leave the Default Landing tab set to the Home tab and click Next.
- 8. Select the Visible check box to make the app available to all users.
- 9. Click Save to create the Lunch Tracker app.
- 10. Repeat the steps 1–9, but this time select the Contacts tab. This is shown in Figure 11-14.
- 11. After the app is created, it is shown on the Force.com app menu in the upper right





**FIGURE 11-12** Start creating your app by defining a custom object.



The screenshot shows the 'New Custom App' wizard in the Salesforce Developer Edition. The browser address bar shows the URL: https://na6.salesforce.com/ui/setup/tab/TabSetWizard?retURL=%2F02u%3FretURL=. The page title is 'New Custom App - Salesforce - Developer Edition'. The left sidebar contains navigation links for 'Personal Setup' (My Personal Information, Email, Import, Desktop Integration), 'App Setup' (Customize, Create, Custom Labels, Objects, Packages, Report Types, Tabs, Workflow & Approvals, Develop, View Installed Packages), and 'Administration Setup' (Manage Users, Company Profile, Security Controls, Communication Templates, Data Management, Monitoring, Mobile Administration, Offline Administration, Email Administration, Google Apps). The main content area is titled 'New Custom App' and 'Step 1 of 4: Enter the Details'. It instructs the user to 'Fill in the fields below to define the custom app.' The 'Custom App Information' section includes fields for 'App Label' (Lunch Tracker), 'App Name' (Lunch\_Tracker), and 'Description' (this application tracks your lunch expenses). A 'Next' button is visible at the bottom right of the form. The footer contains copyright information: Copyright © 2000-2006 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance.

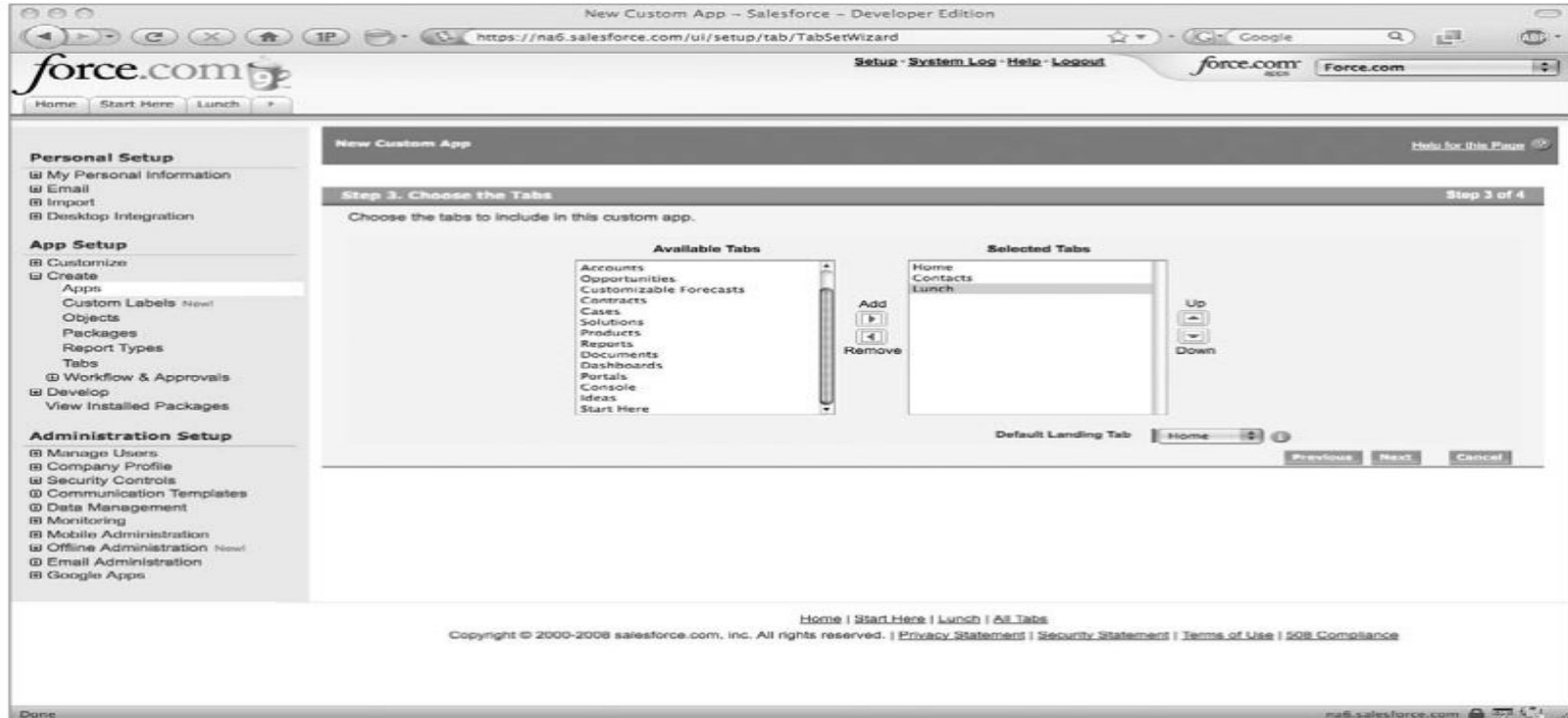
**FIGURE 11-13** Configure your app to have settings like this one.



## Test It Out :

**Now that your app has been created, let's take it for a spin.**

1. Select the Lunch Tracker application from the Force.com app menu at the upper right of the screen.
  2. Click on the Lunch Tracker tab and click New to create a new lunch expense entry.
  3. Enter some test data (our example is shown in Figure 11-15).
  4. For the Contact field, click the lookup icon, click New to create a new contact named BruceDickinson, and then click Save.
  5. Click Save to save your record and to return to the detail page for the new record. And there you have it.
- You were able to make your very own app on Salesforce quickly and easily, and you didn't need to use any coding—it was all point and click.



**FIGURE 11-14** Choose Contacts and Lunch to be included in tabs.



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