

Go, change the world

• 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.



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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

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| D Manage Users | | The ownership and sharing of a detail record are determined by the master record. When a user deletes the master record, all detail records are deleted. |
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| D Communication Templates | | 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. |
| Data Management 8 Monitoring | | |
| B Mobile Administration | Checkbox | Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be |
| B Offline Administration New! | Currency | vacation is support data to Excel or another spreadings. |
| D Google Apps | ⊕ Date | Allows users to enter a date or pick a date from a popup calendar. |
| | O Data/Time | Allows users to enter a date and time, or pick a date from a populo calendar. When users click a date in the populo, that date and the current time are entered into the Date/Time field. |
| | ○ Email | Allows users to enter an email address. The entered address is validated to ensure that it is in the proper format. Users ean then click on the field to automatically launch their email program and send an email to that address. |
| | ONumber | Allows users to enter any number. Leading zeros are removed. |
| | O Percent | Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number. |
| | Ophone | Allows users to enter any phone number. Automatically formats it as a phone number. |
| | O Prickfiet | Allows users to select a value from a list you define. |
| | O Prickfiel (Multi-Select) | Allows users to select multiple values from a list you define. |
| | O Text | Allows users to enter any combination of letters and numbers. |
| | O Text Area | Allows users to enter up to 255 characters on separate lines. |
| | ○ Text Area (Long) | Allows users to enter up to 32000 characters on separate lines. |
| | OURL | 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 11-6 A key piece of data to be tracked by this app is the date.

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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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| Home Start Here > | | |
| Personal Setup B My Personal Information I Email | Lunch New Custom Field Step 1. Choose the field type | Helo for His Paus Step 1 |
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| D Customize B Create | O None Selected | Select one of the data types below. |
| Apps | O Auto Number | A system-generated sequence number that uses a display formal you define. The number is automatically incremented for seath reservences. |
| Custom Labels New! Objects | O 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. |
| Packages Report Types | ○ Roth-Up Summary ② | 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. |
| Tabs Workflow & Approvals Develop | O Lookup Relationship | Greates 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 populp list. The other object is the source of the values in the list. |
| View Installed Packages | Measur-Detail Relationship | Creates a special type of purent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where: The relationship field is required on all detail records. |
| dministration Setup Manage Users Company Profile Security Controls Communication Templates Data Management | | Once the value of the relationship field has been saved, it cannot be changed. The ownership and sharing of a detail record are determined by the imaster record. When a user deletes the master record, all detail records are deleted. You can create notice summary fields on the master record to summarize the detail records. The relationship field allows users to dlick on a lookup ison to select a value from a popup list. The master object is the source of the values in the list. |
| B Monitoring | Checkbox | Allows users to select a True (checked) or False (unchecked) value. |
| Mobile Administration Offline Administration Email Administration | Commency | 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. |
| D Google Apps | Otate | Allows users to enter a date or pick a date from a popup calendar. |
| | O Date/Time | Allows users to enter a date and time, or pick a date from a populp calendar. When users click a date in the populp, that date and the current time are entered into the Date/Time field. |
| | Cenal | Allows users to enter an email address. The entered address is swilldelsed to ensure that it is in the proper format. Users can then click on the field to automatically launch their ennall program and senied as email to their address. |
| | ⊗ Number | Allows users to enter any number. Leading zeros are removed. |
| | O Percent | Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number. |
| | O Phone | Allows users to enter any phone number. Automatically formats it as a phone number. |
| | O Pickfiet | Allows users to select a value from a list you define. |
| | O Prickfiel (Multi-Gelect) | Allows users to asiect multiple values from a list you define. |
| | ○ Text | Allows users to enter any combination of letters and numbers. |
| | O Text Area | Allows users to enter up to 255 characters on separate lines. |
| | C Text Area (Long) | Allows users to enter up to 32000 characters on separate lines. |
| | OURL | 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 |
| | | |

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

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| Customize Create Apps Custom Labels Name Objects Packages Report Types Tabs ① Workflow & Approvals Develop View Installed Packages | Length Field Name Description Help Text | can accept values u | ngth of the number and the number as to "12345678.90". the left of the decimal point | of decimal places. For exam Decimal Places | rple, a number with a ler 2 Number of digits to the | | |
| dministration Setup | | | | | | | |
| Manage Users Company Profile Security Controls Communication Templates Data Management Monitoring Mobile Administration Offline Administration Email Administration Email Administration | Required Unique External ID Default Value | Do not allow du | the unique record identifier from a | n external system | presión. | | |
| Google Apps | | | | | 100 | CONTRACTOR OF THE PERSON | Cancel |
| | Copyright © 200 | 00-2006 saiesforce.co | Home Start Her m, Inc. All rights reserved. Privac | | | | |

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

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| Some Start Here | | |
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| Personal Setup | New Custom Field | Hele for this Person |
| My Personal Information | | |
| Email | Step 1. Choose the field type | Step 1 |
| Import Desktop Integration | | Next Cancel |
| Deskiop integration | Specify the type of information that the | e custom field will contain. |
| pp Setup | Data Type | |
| Customize | O None Selected | Select one of the data types below: |
| Apps | O Auto Number | A system-generated sequence number that uses a display formal you define. The number is automatically incremented for |
| Custom Labels New! | | each new record. |
| Objects | O 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. |
| Packages Report Types Tabs | O Roth-Up Summary 10 | 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. |
| B Workflow & Approvals | © 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. |
| View Installed Packages | O 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: |
| Administration Setup | | The relationship field is required on all detail records. |
| Manage Users | | Once the value of the relationship field has been saved, it cannot be changed. The ownership and sharing of a detail record are determined by the master record. |
| Company Profile | | When a user deletes the master record, all detail records are deleted. |
| B Security Controls | | You can create rollup summary fields on the master record to summarize the detail records. The relationship field allows users to click on a lookup itom to select a value from a popule file. The master object is the source. |
| D Communication Templates D Data Management | | of the values in the list. |
| 8 Monitoring | Checkbox | Allows users to select a True (phecked) or False (unchecked) value. |
| Mobile Administration Offline Administration New! Email Administration | 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. |
| 9 Google Apps | Opete | Allows users to enter a date or pick a date from a popup calendar. |
| | O Date/Time | Allows users to enter a date and time, or pick a date from a populp calendar. When users click a date in the populp, that date and the current time are entered anto the Date/Time field. |
| | ○ £mail | Allows users to enter an armal address. The entered address is walldated to ansure that it is in the proper format. Users can then click on the field to automatically issuand their armali program and send an amalia to their address. |
| | ONumber | Allows users to enter any number. Leading zeros are removed. |
| | O Percent | Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number. |
| | O Phone | Allows users to enter any phone number. Automatically formats it as a phone number. |
| | O PICKENT | Allows users to select a value from a list you define. |
| | O Pickfiet (Multi-Select) | Allows users to select multiple values from a list you define. |
| | ○ Text | Allows users to enter any combination of letters and numbers. |
| | ○ Text Area | Allows users to enter up to 255 characters on separate lines. |
| | C Text Area (Long) | Allows users to enter up to 32000 characters on separate lines. |
| | OURL | Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window. |
| | | Nave Cancel |

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.

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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

| force.com | | | | Setup · System Log · Hel | p-Logout | force.com | Force.com | |
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| B My Personal Information B Email D Import D Desktop Integration | Step 3. Enter the label ar | ed name for lookup t | field | | | Fre | vious Next | Step 3 of 6 |
| App Setup 9 Customize 8 Create Apps Custom Labels New! | Field Label Field Name Description | Contact Contact Personihadiunchwith | 0 | | | | | |
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| | Copyright © 200 | 00-2008 salesforce.com, i | | ne i Start Here i All Taba rved. Privacy Statement | Security Statement | Terms of Use 508 | Compliance | |

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

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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

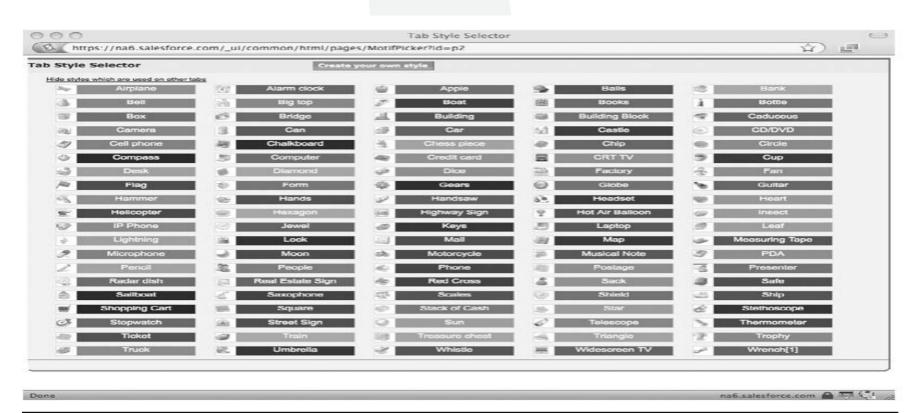


Figure 11-12 Start creating your app by defining a custom object.

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|--|--|---|--|------------------------------|-------------|
| Personal Setup W My Personal Information E Email Import | New Custom App Step 1. Enter the Details | 1.70 | 7,715, T. F. | Health | Sinp 1 of 4 |
| Desktop Integration | Fill in the fields below to def | ine the custom app. | | | |
| App Setup | Custom App Information | | | I = Required Info | mation |
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| | Copyright © 200 | Home Start. 00-2006 salesforce.com, inc. All rights reserved. | Here I Lunch All Tabs Privacy Statement Security Statement Te | erms of Use I 508 Compliance | |

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

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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.

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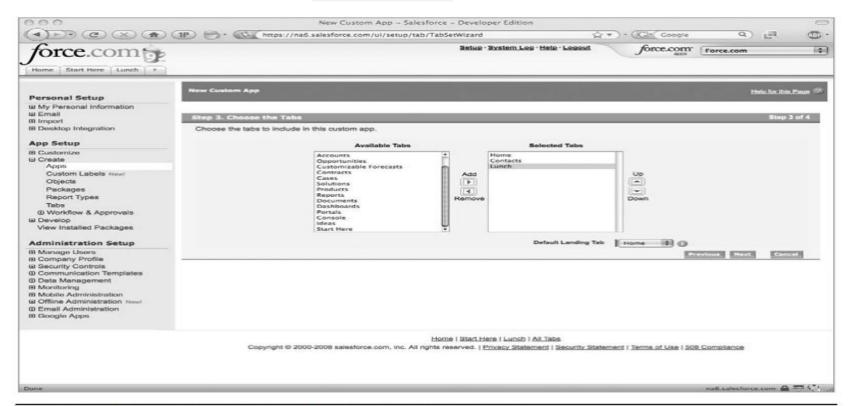


Figure 11-14 Choose Contacts and Lunch to be included in tabs.

