

Lab Assignment #4

The objective of this assignment is to get an introduction to the *Salesforce.com* platform and learn simple tasks (such as record creation, custom object, creation, and running a query). You will need this to complete the Final Project.

Some information and terminology about the Platform:

Salesforce.com provides SaaS, which is composed of Sales Cloud, Service Cloud, Marketing Cloud, Commerce Cloud, Analytics Cloud, IoT Cloud, App Cloud, Health Cloud, Financial Services Cloud, Force.com, and Chatter.

Force.com provides PaaS, so that developers can create applications that integrate into the main Salesforce.com application.

Objects and Fields

Objects provide the structure for storing data, and they are integrated into the user interface so that users can interact with it. The concept of object fields is comparable to that of a database column, whereas the concept of records is similar to that of a database row.

Standard Objects are the objects that are provided by the Salesforce. Common business objects, such as Account, Contact, Lead, and Opportunity, are examples of standard objects.

Custom Objects:

Custom objects are the objects that are unique to a particular business or industry.

Salesforce Object Query Language (SOQL) is used to form the queries for the access to the information stored in the user environment (Org) database.

A) Creating your Salesforce Developer Account

For creating your salesforce developer account, please use the link

<https://developer.salesforce.com/signup>

Login: <https://login.salesforce.com/> (You can login after creating your account using this link)

developer.salesforce.com/signup

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Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

First Name*
abc

Last Name*
xyz

Email*
abc@stevens.edu

Role*
Developer

Company*
Stevens Institute of Technology

Country/Region*
United States

Postal Code*
11111

Username*
abc@stevens.edu

By registering, you confirm you have read and agree to the [Terms of Use](#) and the [Master Subscription Agreement](#) and to the storing and processing of your personal data by Salesforce as described in the [Privacy Statement](#), including use for marketing purposes.

Sign me Up

Already have a Salesforce Developer Environment?
[Log in](#)

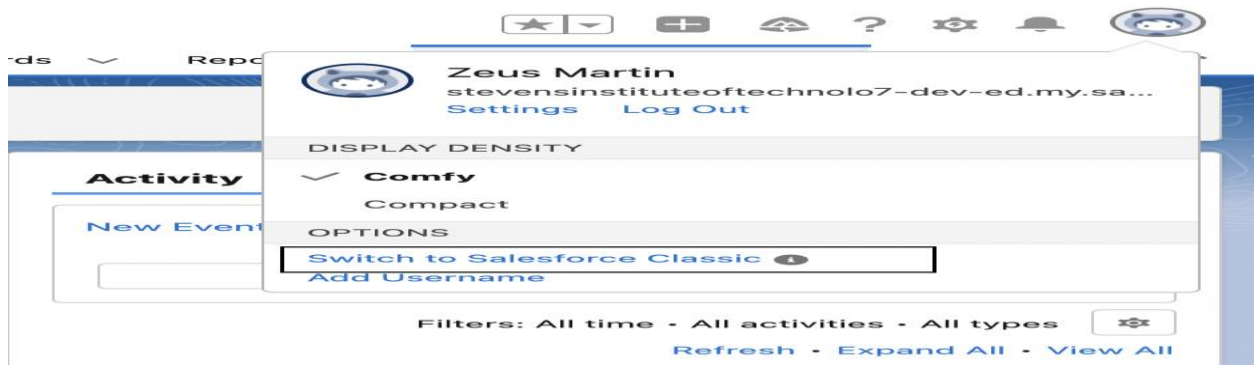
SI	Fields	Account Information
1	First Name	"Your First Name"
2	Last Name	"Your Last Name"
3	Email	"Stevens Mail Id"
4	Role	"Developer" (You can choose any choice)
5	Company	"Stevens Institute of Technology"
6	Country	"United States"
7	Postal Code	"Your Postal Code"
8	Username	"Stevens Mail Id"

Click on **Sign me up**

A verification email will be sent to your provided email id which can takes up to 5-10 minutes. Verify your account and create password and necessary details which needs to be provide. After verifying your account Salesforce Lightning Page will be loaded. You will need to change your account to *Salesforce Classic Mode*.

Steps are as follows:

- 1) Click on **View Profile**
(You will be able to find it on top right corner)



- 2) You will be able to see the **Switch to Salesforce Classic** under the options.



- 3) Click on Switch to Salesforce Classic. Congratulation you are in Salesforce Classic Mode.

B) Creating record using Salesforce Standard Object [Total: 10 Points]

For creating records, you need to follow these steps:

- i) Either **Accounts** Object will be bar or Click on the “+”



- ii) Click on the Accounts Object.

- Account page will open
- Click on **New**
- A new Account Detail page will open provide the necessary details.
Note: **Account Name** = “Your Name”
- Click on **Save**
- An Account will be created by your **Name**.

Zeus Martin Customize Page | Edit Layout | Printable View | Help for this Page

[Hide Feed](#) [Click to add topics](#)

[Post](#) [File](#) [New Task](#) [More](#)

Write something... [Share](#) [Follow](#)

[Show All Updates](#) No followers.

There are no updates.

[Contacts \(0\)](#) [Opportunities \(0\)](#) [Cases \(0\)](#) [Open Activities \(0\)](#) [Activity History \(0\)](#) [Notes & Attachments \(0\)](#) [Partners \(0\)](#)

Account Detail [Edit](#) [Delete](#) [Sharing](#) [Include Offline](#)

Account Name	Zeus Martin (View Hierarchy)	Rating	Gold
Parent Account		Phone	123123123
Account Number	123123123	Fax	
Account Site	New Jersey	Website	
Type	Prospect	Ticker Symbol	
Industry	Agriculture	Ownership	
Annual Revenue	\$123,433	Employees	
Billing Address		SIC Code	
Customer Priority		Shipping Address	
SLA Expiration Date		SLA	
Number of Locations		SLA Serial Number	
Active		Upsell Opportunity	
Created By	Rajat Mishra, 4/3/2022, 8:40 PM	Last Modified By	Rajat Mishra, 4/3/2022, 8:40 PM
Description			
Custom Links			

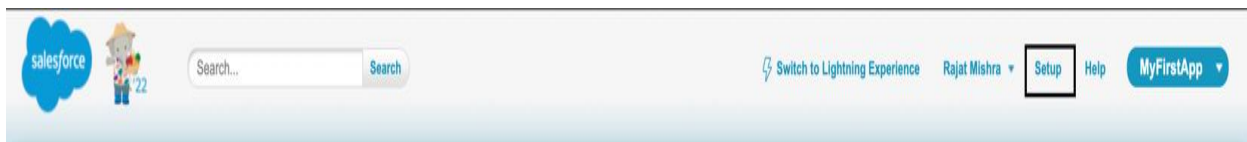
[Edit](#) [Delete](#) [Sharing](#) [Include Offline](#)

C) Creating Custom Objects and Fields [Total: 50 Points]

Part I: Creating Custom Object [25 Points]

For creating custom object, you need to follow these steps:

- Click on **Setup** (You will find setup on the top right corner after help)



- Go to **Quick Find/ Search** box (You will find it on the left side) and Search **Objects** and click on **Objects** (You will find it under Create)

Home Accounts Cases Campaigns Student Information +

It's Better in Lightning

Move to Lightning Experience and give your users a productivity boost.

Objects [Expand All](#) [Collapse All](#)

Build

- ☒ **Customize**
 - ☒ **Topics**

Topics for Objects
- ☒ **Create**
 - Objects**

Big Objects
- ☒ **Develop**

External Objects

Getting Started

Build App
Generate a basic app with just one step, and then easily extend that app with clicks or code.
[Add App](#)

Salesfor
Turn on the Salesforce
[Get](#)

Recent Items beta

Name	Type
Account Layout	Page Layout
Rajat Mishra	User
Student Information	Custom Object Definition
CUSTOMER	Custom Field Definition

iii) Click on **New Custom Objects** and fill the following information as per the screenshot

Label: Student Information

Plural Label: Student Information

Object Name: Student_Information

Context-Sensitive Help Setting: Open a window using a Visualforce page

Record Name: Student Name

Data Type: Text

Optional Features: All Checked except Enable Licensing

Object Classification: All Checked

Deployment Status: Deployed

Search Status: Unchecked Allow Search

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

Launch New Custom Tab Wizard after saving this custom object

Get more info] [a href="#">Don't show this message again]'. The 'Custom Object Definition Edit' section includes fields for Label (Student Information), Plural Label (Student Information), Starts with vowel sound (unchecked), Object Name (Student_Information), Description, Context-Sensitive Help Setting (Open a window using a Visualforce page), and Content Name (None). The 'Enter Record Name Label and Format' section has Record Name (Student Name) and Data Type (Text). The 'Optional Features' section has checkboxes for Allow Reports, Allow Activities, Track Field History, Allow in Chatter Groups (all checked), and Enable Licensing (unchecked). The 'Object Classification' section has checkboxes for Allow Sharing, Allow Bulk API Access, and Allow Streaming API Access (all checked). The 'Deployment Status' section has radio buttons for In Development and Deployed (selected). The 'Search Status' section has a checkbox for Allow Search (unchecked). The 'Object Creation Options (Available only when custom object is first created)' section has checkboxes for Add Notes and Attachments related list to default page layout (unchecked) and Launch New Custom Tab Wizard after saving this custom object (checked)."/>

iv) Click **Save**

v) **New Custom Object Tab** page will open. Click on **Tab Style** and select any Tab style

New Custom Object Tab

Step 1: Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or create a new custom object now.

Object: **Student Information** ▼

Tab Style: **Standard** ▼

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: **None** ▼

Enter a short description.

Description:

- vi) Click on **Next** and make sure that the **Apply one tab visibility to all profile** is selected.
- vii) Click **Next** and **Save**.

Part II: Creating Custom Fields [25 points]

After Clicking on **Save** the Custom Object configuration Page will open. Now we are going to add custom fields in this Object.

- i) You will be able to see **Custom Fields and Relationships** section which will be under Standard fields.
- ii) Click on **New**

Custom Object
Student Information

Standard Fields (1) | Custom Fields & Relationships (0) | Validation Rules (0) | Page Layouts (1) | Field Sets (0) | Connect Layouts (1) | Search Layouts (0) | Buttons, Links, and Actions (0) | Record Types (0) | Apex Sharing Reasons (0) | Apex Sharing Recalculation (0) | Object Limits (10)

Custom Object Definition Detail Edit Delete

Singular Label	Plural Label	Object Name	API Name	Description	Enable Reports	Track Activities	Allow in Chatter Groups	Allow Sharing	Allow Bulk API Access	Allow Streaming API Access	Track Field History	Enable Licensing	Deployment Status	Allow Search	Help Settings	Modified By
Student Information	Student Information	Student_Information	Student_Information__c		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Deployed	<input checked="" type="checkbox"/>	Standard salesforce.com Help Window	Rajat Mishra, 4/3/2022, 9:46 PM

Created By: Rajat Mishra, 4/3/2022, 9:46 PM

Standard Fields

Action	Field Level	Field Name	Data Type	Controlling Field	Indexed	Track History
	Created By	CreatedBy	Lookup(User)			<input type="checkbox"/>
	Last Modified By	LastModifiedBy	Lookup(User)			<input type="checkbox"/>
Edit	Owner	Owner	Lookup(User Group)		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Edit	Student Name	Name	Text(80)		<input checked="" type="checkbox"/>	<input type="checkbox"/>

Custom Fields & Relationships New Field Dependencies Set History Tracking

No custom fields defined

- iii) On Click **New**. Choose the **Field Type** and Click **Next**
- iv) Fill out the necessary information's and Click **Next**
- v) Field Level Security Page will open Click on **Visible Check box** and Click **Next**
- vi) Add to **Page layout** will open Click **Save**

Note: You need to create four custom fields

For creating all these fields, the process will be similar the one you have already followed.

1) **Department:**

Field Type: Text Area Long

Field Label: Department

Field Name: Department (This will be populated automatically)

Visible: Checked

Add to page layouts: Student Information Layout Checked

2) **CWID:**

Field Type: Text Area Long

Field Label: CWID

Field Name: CWID (This will be populated automatically)

Visible: Checked

Add to page layouts: Student Information Layout Checked

3) **Semester**

Field Type: Picklist (Don't Select Picklist (Multi-Select))

Field Label: Semester

Values: Click on **Enter values, with each value separated by a new line** and enter following values - **Fall, Spring, Summer** (All these values need to be on separate line)

Field Name: Semester (This will be populated automatically)

Visible: Checked

Add to page layouts: Student Information Layout Checked

4) **Date of Joining**

Field Type: Date

Field Label: Date of Joining

Field Name: Date of Joining (This will be populated automatically)

Visible: Checked

Add to page layouts: Student Information Layout Checked

D) Creating record on Custom Object [Total: 20 Points]

Now you need to create record on the custom object (Student Information)

i) You will be able to see the **Student Information** Tab on the Top along with the other tabs



ii) Click on the Tab Student Information Page will open.

iii) Click on **New**

iv) Provide **Your Information** Ex: **Name**= "Zeus Martin"

v) Click on **Save**

Student information page will be created, and your details will be populated.

E) Retrieving the created records using SOQL [Total: 20 Points]

Now we will be retrieving the records which we have created using Developer Console by running SOQL.

i) Click on **User Menu** which will be having your **Name** (Before **Setup**)



ii) **Developer Console** will open, and, in the bottom, you will see **Query Editor**. Click on the **Query Editor**



Now, we will be running two SOQL queries for retrieving the records that we have created.

Two Queries:

1) For Standard Object [10 Points]

SELECT Id, Name FROM Account WHERE Name = 'Your Name'

After pasting this query on the query editor click on **Execute**. You will be able to see the record that you have created on Account object.

2) For Custom Object [10 Points]

SELECT Id, Name FROM Student_Information__c WHERE Name = 'Your Name'

After pasting this query on the query editor click on **Execute**. You will be able to see the record that you have created on Student Information object.

Your output must include the screenshots demonstrating the completion of each of the above steps.