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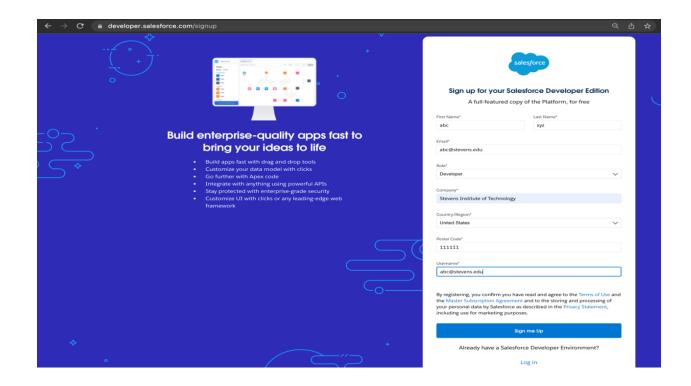
Custom Objects:
Custom objects are the objects that are unique to a particular business or industry.

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)

Sl	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**
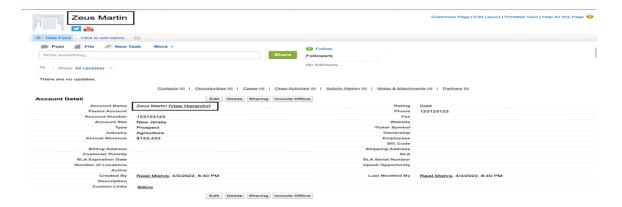   (You will be able to find it on top right corner)

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.

       a. Account page will open
       b. Click on **New**
       c. A new Account Detail page will open provide the necessary details.
           Note: **Account Name** = "Your Name"
       d. Click on **Save**
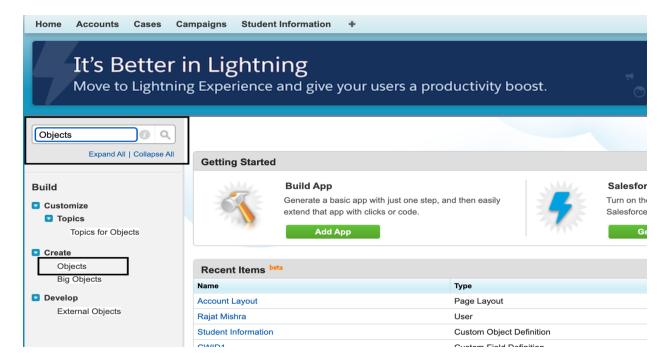   e. An Account will be created by your **Name**.

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:

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

ii) 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)

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
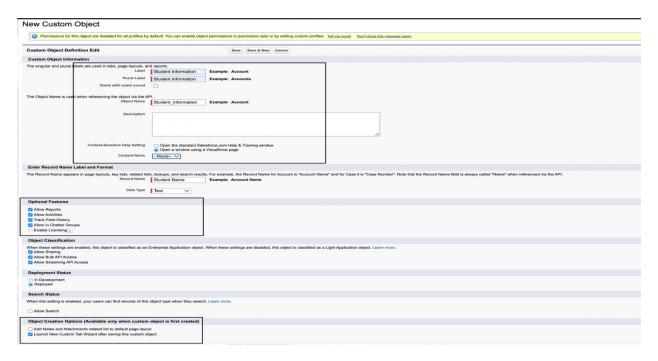**Record Name:** Student Name
Data Type: Text
Optional Features: All Checked except Enable Licensing
Object Classification: All Checked
Deployment Status: Deployed
Search Status: Unchecked Allow Search
Object Creation Options (Available only when custom object is first created): Launch New Custom Tab Wizard after saving this custom object

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:

(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--
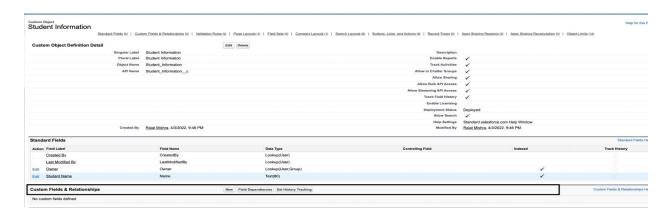
Enter a short description.

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**

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 screeenshots demonstrating the completion of each of the above steps.