## SESSION 2

## Apps, Objects, Tabs and Data Types

**Applications:**

An ***app*** is a collection of items that work together to serve a particular function.

Two Types of Applications:

**1. Standard Applications:** The apps which comes with every instance of salesforce by default.
Readymade Applications:
Ex:Sales, Service, Marketing, App Launcher, Community, Salesforce Chatter, Content,..etc.

**2. Custom Applications:** We can build our own custom applications based on the application requirement.
Ex:Banking, Telecom, Finance, Insurance, Manufacturing, Education, Pharma, Technology,...etc.
We can Customize / Remove the custom applications from the organization.

Steps for Creating Custom App:
1. Setup mode, select build --> create --> Apps
2 In App Section Click New.
3 Check Custom App and click Next.
4 Enter Recruiting for both App Label and App Name, and click Next.
5 Accept the default App logo and click next.
6. Add the Recruiting App tab to the Selected Tabs and click Next.
7. Check the Visible checkbox for the System Administrator profile and Click Save.

**There are two types of objects:**

**1. Standard Objects:** Readymade Objects provided by Salesforce.

Ex:Campaign, Lead, Account, Contact, Opportunity, Case, Solution, Product, PriceBook, order, Contract, Quote, Task, Event, Document,...etc.

**2. Custom Objects:** The Developer / Administrator can create their own application / business specific objects called as "Custom Objects".

Ex: Position__c, Contact__c, Student__c, Employee__c.

**Creating the Custom Object:**
We have 2 Ways to Create Custom Objects.

1. By using Standard Navigation.
   Setup --> Build --> Create --> Objects --> New Custom object.

Ex: Custom Object: Position
   Table : Position__c
   Tab : Positions
2. By using Schema Builder.

Steps:

Setup --> Build --> Create --> Objects

1. Click on "Custom Object" button.
2. Enter the Singular Label:
3. Enter the Plural Label:
4. Enter the Description / Comment.
5. Goto the "Optional Features" section.
    1. CheckBox: Allow Reports.
    2. CheckBox: Allow Activities. (Task, Events)
    3. CheckBox: Track Field History
    4. CheckBox: Allow in Chatter Groups.
    6. Goto the "Deployment Status" section.
    1. In Development
    2. Deployed. (default)
    7. Goto the "Object Creation Features" section.
1. Select CheckBox: Add Notes & Attachments Related List.
2. Select CheckBox: Launch a New Custom Tab Wizard After Saving the Custom Object.
    8. Click on "Save" button.
    9. Select the "Tab Style" from the Lookup icon.
    10. Click on "Next" button.
11. Make the Tab to be visible to all the Profile Users, by selecting the "Default ON" option.
12. Click on "Next" button.
13. Select the Checkbox "Include Tab", to make the Tab to be visible for all the Applications.
14. Click on "Save" button.

**Tabs:**

Custom Object Tabs: This feature is used to Create a Tab for the Custom object, which doesn't have the Tab.

Note: An object can have only one Tab.

Steps:

Setup --> Build --> Create --> Tabs.

**Fields:** Field represents a column inside the Table, which is used to store the Application / Business / Organization specific data.

Two Types of Fields we can have:

**1. Standard Fields:** Readymade fields provided Salesforce by default inside the object.

Ex: Id, Name, Owner, CreatedBy, LastModifiedBy.

Note: We can Customize the Fields (i.e. We can Change the Label). But, we can't remove the field from the object.

**2. Custom Fields:**

The Developer / Administrator can create the additional fields inside the object to store the application specific data.

Ex: Email__c, Phone__c, City__c, Address__c,...etc.

Note: We can Customize & Remove the Custom fields.

**Create the Custom Fields:** Upon Creating a Field, we have to select the required Field Type. DataType describes, what type of data / value the column can hold.

Go to Setup --> Object--> select Custom Fields & Relationshios

Salesforce provides the below Field Types (Data types)

**1. Text:** This DataType allows us to store the Alphanumerical Values along with Special Characters. It allows us to store max. of 255 Characters.

Properties:
1. Field Label**:** To specify the Label Name for the field to be visible on the User Interface. (Ex: City)
2. Field Name / API Name: Represents the actual column name in the table. (Ex: City__c)
3. Description: It provides description why we are creating field, description about field,comment.
4. Help Text: Field level help lets you provide help text detailing the purpose and function of any standard or custom field.
5. Required CheckBox: To make the field mandatory.
6. Unique CheckBox: To make the field value unique.
7. Length : Restrict the Number of characters to be allowed in the field.
8. External ID CheckBox: Used to store the External System Record ID for the reference during the Integration process.

**2. Text Area:** Allows us to enter the content max. of 255 Characters in multiple lines.
Properties:
1. Field Label:
2. Field Name / APIName:
3. Description:
4. Help Text:
5. Length:
6. # Lines Visible:

**3. Text Area Long:**Allows us to enter the content max. of 1,31,072 Characters in multiple lines.
Properties:
1. Field Label:
2. Field Name / APIName:
3. Description:
4. Help Text:
5. Length:
6. # Lines Visible:

**4. Text Area Rich:**Allows us to enter the content max. of 1,31,072 Characters in multiple lines along with the formatting options.you can add images and links.
Properties:
1. Field Label:
2. Field Name / APIName:
3. Description:
4. Help Text:
5. Length:
6. # Lines Visible:

**5. CheckBox:** Allows us to store the TRUE / FALSE values inside the field. (i.e. Boolean Values)
Properties:
1.Field Label:
2. Field Name / APIName:
3. Description:
4. Help Text:
5. Default : UnChecked.

**6. Currency:** Allows us to store the Currency value. Allows max. of an 18-Digit number including Decimal points. This can be helpful if you export data to excel or another spreadsheet.

Salary Amount: 50,000 After Saving --> Salary Amount : $ 50,000

Properties:
1. Field Label:
2. Field Name / APIName:
3. Description:
4. Help Text:
5. Required CheckBox:
6. Length : # of Digits to be allowed.
7. # of Decimal Digits:
8. External ID CheckBox:

we can change currency go to set up company information edit and check activate multiple currencies.

**7. Date:**Allows us to store the Date values inside the column by selecting from a Pop-up calendar.
Properties:
1. Field Label:
2. Field Name / APIName:
3. Description:
4. Help Text:
5. Required CheckBox:

**8. Time:** Allows us to store the Local Time value inside the field. We can store the time either in 12 / 24 hours format.
HH:MM
HH:MM:SS
HH:MM:SS:MSEC ( 1 Sec = 1,000 Milliseconds)

Properties:
1. Field Label:
2. Field Name / APIName:
3. Description:
4. Help Text:
5. Required CheckBox:

**9. DateTime:** It allows us to store both DateTime stamp value inside the field.
Properties:
1. Field Label:
2. Field Name / APIName:
3. Description:
4. Help Text:

5. Required CheckBox:

**10. Number:** It allows us to store the Numerical values along with the decimal points.We can store max. of an 18-Digit number.

Properties:
1. Field Label:
2. Field Name / APIName:
3. Description:
4. Help Text:
5. Required CheckBox:
6. Length : Number of Digits to be allowed.
7. # Decimal Digits: Number of Digits to be allowed after decimal point.
8. External ID CheckBox:

**11. URL:** It allows us to store the Website Name / Address of a Web application based on the Path / URL.
Properties:
1. Field Label:
2. Field Name / APIName:
3. Description:
4. Help Text:
5. Required CheckBox:

**12. Phone:** It allows us to store either Phone Number / Fax Number values inside the field.
Ex: Contact Number : 9876543210 --> Save --> Contact Number: (987) 654-3210

Properties:
1. Field Label:
2. Field Name / APIName:
3. Description:
4. Help Text:
5. Required CheckBox:

**13. Email:** Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Properties:
1. Field Label:
2. Field Name / APIName:
3. Description:
4. Help Text:
5. Required CheckBox:
6. External ID:
7. Unique CheckBox:

**14. Percent:** Allows us to store the Numerical values including the decimal digits. It will post-fix the value with "%" symbol.

Ex: Discount : 5 --> Save --> Discount : 5 %
Properties:
1. Field Label:

2. Field Name / APIName:
3. Description:
4. Help Text:
5. Length:
6. # of Decimal Digits:
7. Required CheckBox:

**14. Picklist: (Dropdown List) :**This control allows us to select only one element from the collection of elements.
Properties:
1. Field Label:
2. Field Name / API Name:
3. Description:
4. Help Text:
5. Required CheckBox:
6. Values :
7. CheckBox : Arrange the Elements in Alphabetical Order.
8. CheckBox : Make the First Element as Default.
9. CheckBox : Restrict the Picklist Values through Programming.

**15. Picklist MultiSelect:** This control allows us to select multiple elements from the collection of elements.
Properties:
1. Field Label:
2. Field Name / API Name:
3. Description:
4. Help Text:
5. Values:
6. CheckBox : Arrange the elements in Alphabetical order.
7. # of Elements Visible: Integer

**16. Text Encrypted:**

Properties:
1. Field Label:
2. Field Name / API Name:
3. Description:
4. Help Text:
5. Required Check :
6. Masked Type:
    1. Mask All Characters
    2. Last Four characters clear
    3. Credit card number
    4. National Insurance Number
    5. SSN Number
7. Masked Character: * X

**17. Auto Number:** This datatype make the column value to be get generated by the Salesforce System itself based on the specified format.
This is a ReadOnly System Generated field, which can't be editable.
Ex: Candiate Records:
Candidate Code: C-1001, C-1002, C-1003

Properties:
1. Field Label:
2. Field Name / API Name:
3. Description:
4. Help Text:
5. Display Format:
6. CheckBox : Generate Auto Number for Existing Records.

**18. Geo Location:** Allows us to store the Latitude and Longitude values of the specified location.

Properties:
1. Field Label:
2. Field Name / API Name:
3. Description:
4. Help Text:
5. Required CheckBox:

**Use Cases:**

1) create Student custom objects with field:
Rollno,
Name of Student,
Class,
Address,
City,
Email
Date of Birth,
Gender,
Mobile

2) create employee custom object with fields:
Employee id,
Employee Name,
Department Name,
Location,
Desg,
City,
Date of Joining,
No. of Yrs Experience,
Job Type,
Salary