

## Experiment No. 4

**Aim:** Creating a Warehouse Application in Salesforce.com.

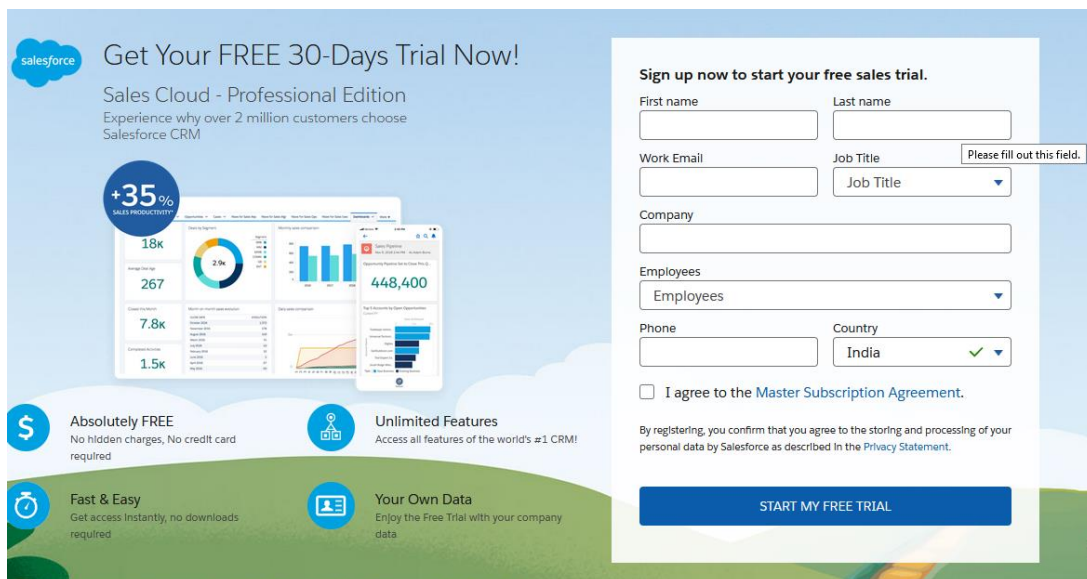
### Theory:

- Salesforce.com, Inc. is an American cloud-based software company headquartered in San Francisco, California.
- It provides customer relationship management (CRM) service and also provides a complementary suite of enterprise applications focused on customer service, marketing automation, analytics, and application development.
- In 2020, Fortune magazine ranked Salesforce at number six on its list, "100 Best Companies to Work For," based on an employee survey of satisfaction.

### Steps for Creating a Warehouse Application:

Goto <https://www.salesforce.com/in/>

Select and Click on Try for Free

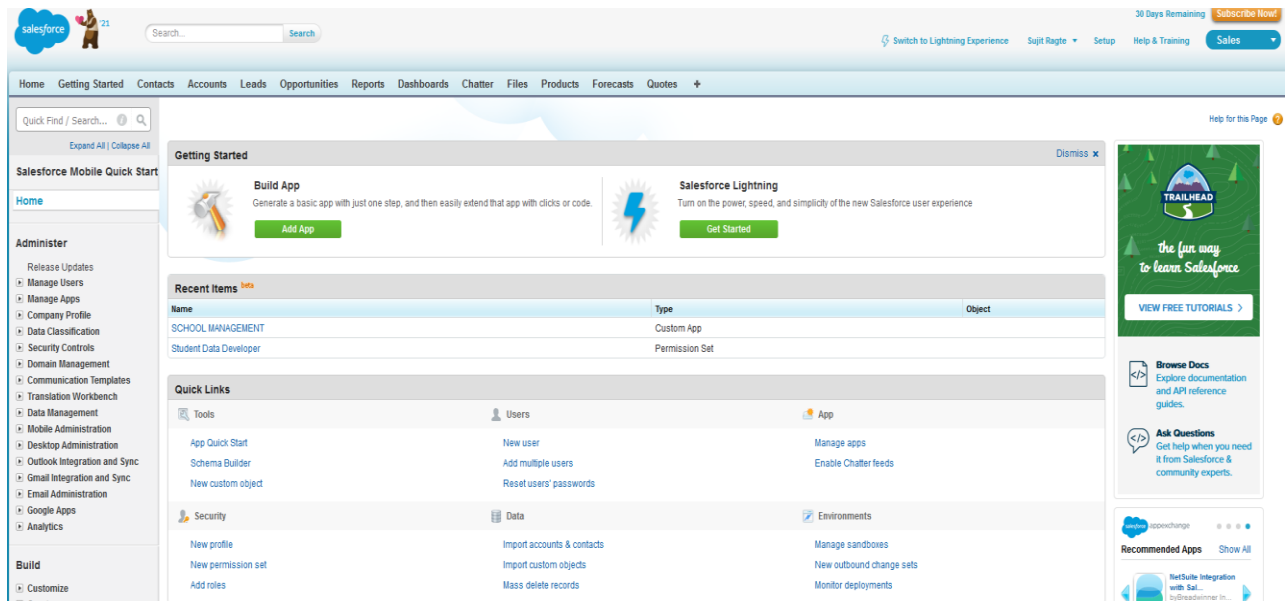


The image shows the Salesforce website's sign-up page for a free 30-day trial of Sales Cloud - Professional Edition. The page features a blue header with the Salesforce logo and a large blue button that says "Get Your FREE 30-Days Trial Now!". Below this, there is a section titled "Sales Cloud - Professional Edition" with a subtext "Experience why over 2 million customers choose Salesforce CRM". To the left of the sign-up form, there is a dashboard preview showing various charts and metrics, including a "+35% SALES PRODUCTIVITY" badge. The sign-up form itself is titled "Sign up now to start your free sales trial." and contains several input fields: "First name", "Last name", "Work Email", "Job Title" (with a tooltip "Please fill out this field."), "Company", "Employees" (a dropdown menu), "Phone", and "Country" (a dropdown menu with "India" selected). There is also a checkbox for "I agree to the Master Subscription Agreement." and a small disclaimer about data storage. At the bottom of the form is a large blue button labeled "START MY FREE TRIAL".

**Enter the Following Details Mentioned Above and Click on Start My Free Trial**

1. Introduction (Applications, Objects, tabs, Fields)
2. Creating a custom application
3. Creating Custom Objects and Fields
4. Creating Custom Tabs

## Switch to Salesforce Classic Mode First



### 1. Introduction (Applications, Objects, tabs, Fields)

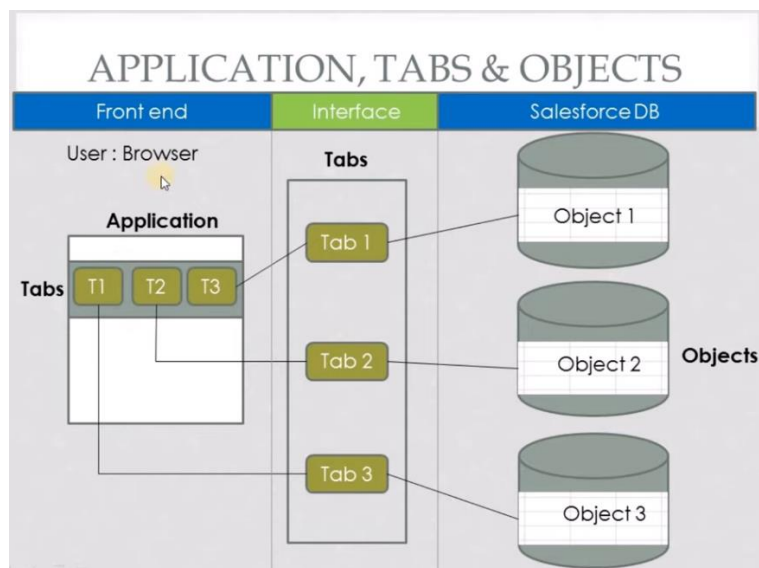
-An Application in Salesforce is a work space where the user Works.

Eg: Sales Executive user works in Sales Application (Sales Cloud)

-An Object in Salesforce is the data table in sales force database which stores a user data.

Eg: Account Object Stores records of client account details

-Tab is the UI between applications and object. It is required so; user can interact with the object to store records.



--Go to Salesforce Home page (Login)

--Goto the top right corner, check out the dropdown menu, the list is the applications made available by the Salesforce.com

## **2. Creating a custom application**

-Setup-Build-Create-Apps-New Apps

-Click on Setup on Home Page

-Next Scroll down Goto side menu, Click on Build

-Under Build-Click on Create

-Under Create Click on Click on Apps

-In the Apps Page Click on New

-New Custom App Page Appears

### **Step 1. Enter the Details**

**-Enter the details**

-App Label: School\_Administration

-App Name: School\_Administration

--Description: This is my First Application

**Click on Next**

### **Step 2. Choose the Image Source for the Custom App Logo**

-Click on next

### **Step 3. Choose the Tabs**

-From the Available Tabs Select two tabs

-For Example: Accounts and Opportunities (Add them One by One)

-Default Landing Tab will be Home (Mandatory)

-Click on Next

### **Step 4. Assign to Profiles**

**-Make it and Select Visible for all the Users**

**-Click on Save**

--App is Created, Goto the top right corner, check out the dropdown menu, School\_Administration App is visible in the list is the applications made available by the Salesforce.com.

--Click on School Administration Application

--The Landing Page the Home Appears with other tabs are also visible **Accounts and Opportunities are also visible.**

**Click on the Accounts Tab**

### **3. Creating Custom Objects and Field**

**-Create a custom object named students with fields “Name, Fathers Name, Phone”**

**-Creating a custom object:**

**-Click on Following Steps:**

-Setup

-Build

-Create

-Object

**-In Custom object Page**

**-Click on New Custom Object**

**-Enter the details in the fields:**

-Label: Student

-Plural Label: Students

-Description: It's Optional

-Deployment Status: Change it to In Development

-Click on Save, Custom Object Created

-Creating a Custom Field Now,

-Click on Setup, Scroll Down Again,

-Goto Create-Object

-Created Object Student is Visible

-Click on the Object

**-Under Custom Fields & Relationships**

-Click on New

**Step 1. Choose the field type**

**-Select a Data Type**

-Select Text, Click on Next

**Step 2. Enter the details**

**-Field Label: Fathers Name**

-Length 10

-Field Name Father\_s\_Name

-Description

-Help Text

-Click on Next

### **Step 3. Establish field-level security**

-Make it visible to all and click on next

### **Step 4. Add to page layouts**

-Just click on Save and New

### **Step 1. Choose the field type**

-Click on Phone

### **Step 2. Enter the details**

-Enter details as Phone Number

-Click on next

-Make it visible to all and click on next

-Click on Save

## **4. Creating Custom Tabs**

-Setup>Create>Tabs

-On Custom tabs Page, Goto Custom Object tabs

-Click on new

### **Step 1. Enter the Details**

-Select Student in object tab

-Select Chess Piece as Tab style

-Click on Next

### **Step 2. Add to Profiles, Click on Next**

### **Step 3. Add to Custom Apps, Click on Save**

-Custom tab Created

-Tab is now visible on Tab Section

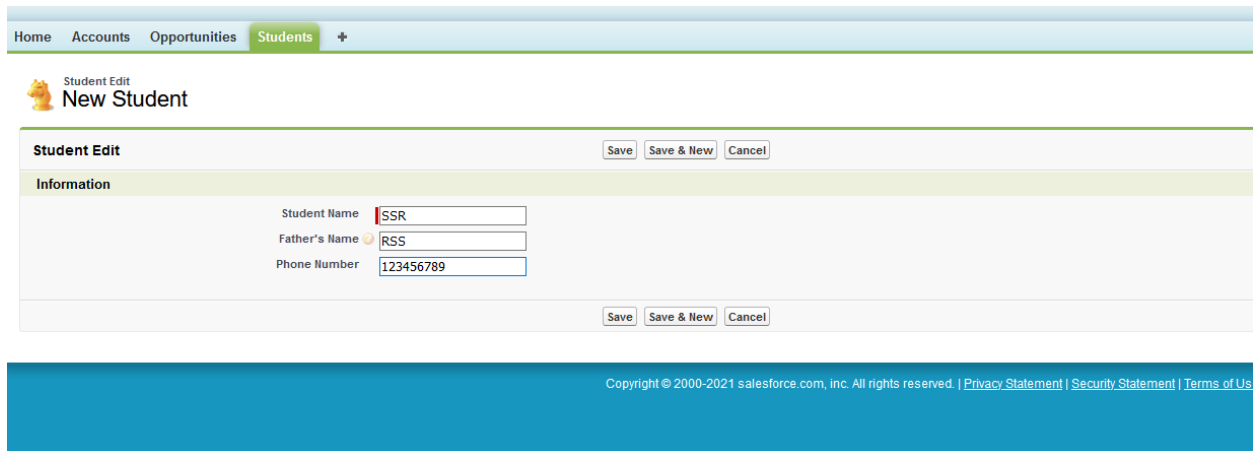
-Click on the tab Student

-Now, you have access to your Students Object

-To Create a record in your students Object, Click on New

-Enter the details

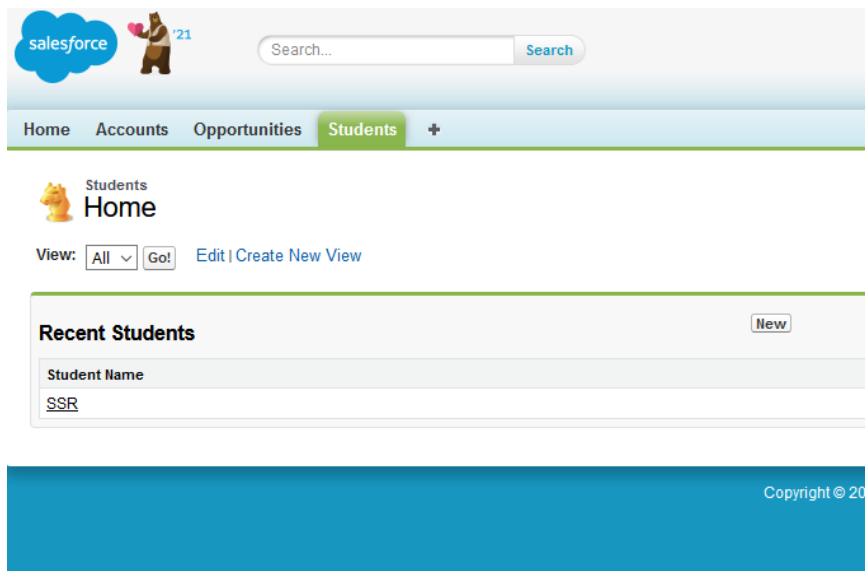
**And Click on Save**



The screenshot shows the 'New Student' form in Salesforce. The top navigation bar includes 'Home', 'Accounts', 'Opportunities', and 'Students' (highlighted). Below the navigation bar, the page title is 'Student Edit' with a 'New Student' link. The form has a 'Student Edit' header with 'Save', 'Save & New', and 'Cancel' buttons. The 'Information' section contains three input fields: 'Student Name' (value: SSR), 'Father's Name' (value: RSS), and 'Phone Number' (value: 123456789). At the bottom of the form, there are 'Save', 'Save & New', and 'Cancel' buttons. The footer of the page displays 'Copyright © 2000-2021 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use'.

**Record is created in Custom Object**

**Click on the tab again**



The screenshot shows the 'Students Home' page in Salesforce. The top navigation bar includes 'Home', 'Accounts', 'Opportunities', and 'Students' (highlighted). Below the navigation bar, the page title is 'Students Home'. The 'View:' section shows 'All' selected, with 'Go!' and 'Edit | Create New View' links. The 'Recent Students' section displays a table with one row: 'Student Name' (value: SSR). A 'New' button is located at the top right of the table. The footer of the page displays 'Copyright © 2000-2021 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use'.

**Recent Created Record is visible.**

**Conclusion:** Hence, I have Performed and created an application, objects, custom fields and tabs in Salesforce.com