Experiment No. 4

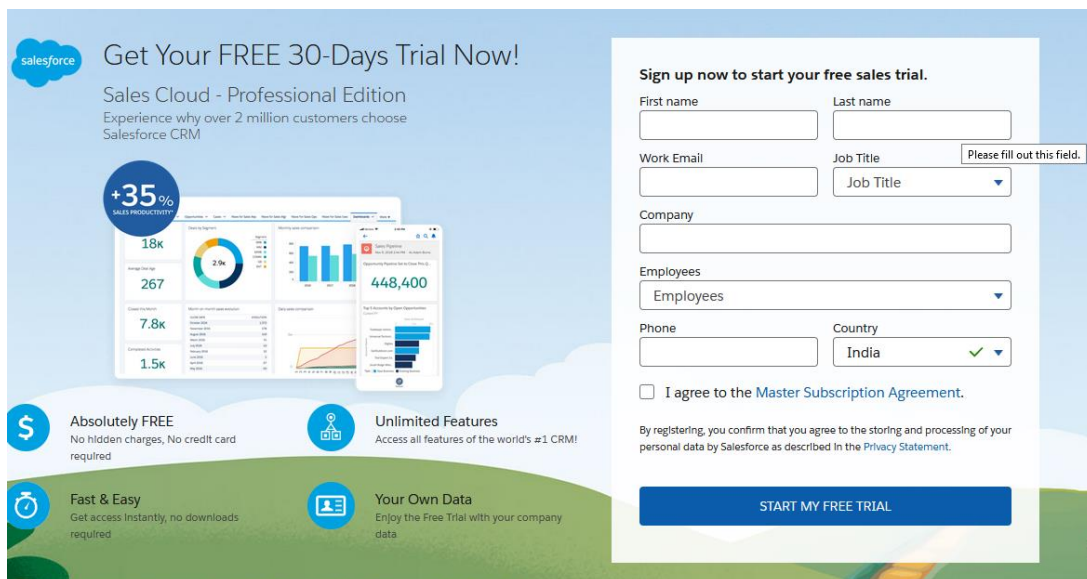**Aim:** Creating a Warehouse Application in SalesForce.com.

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/
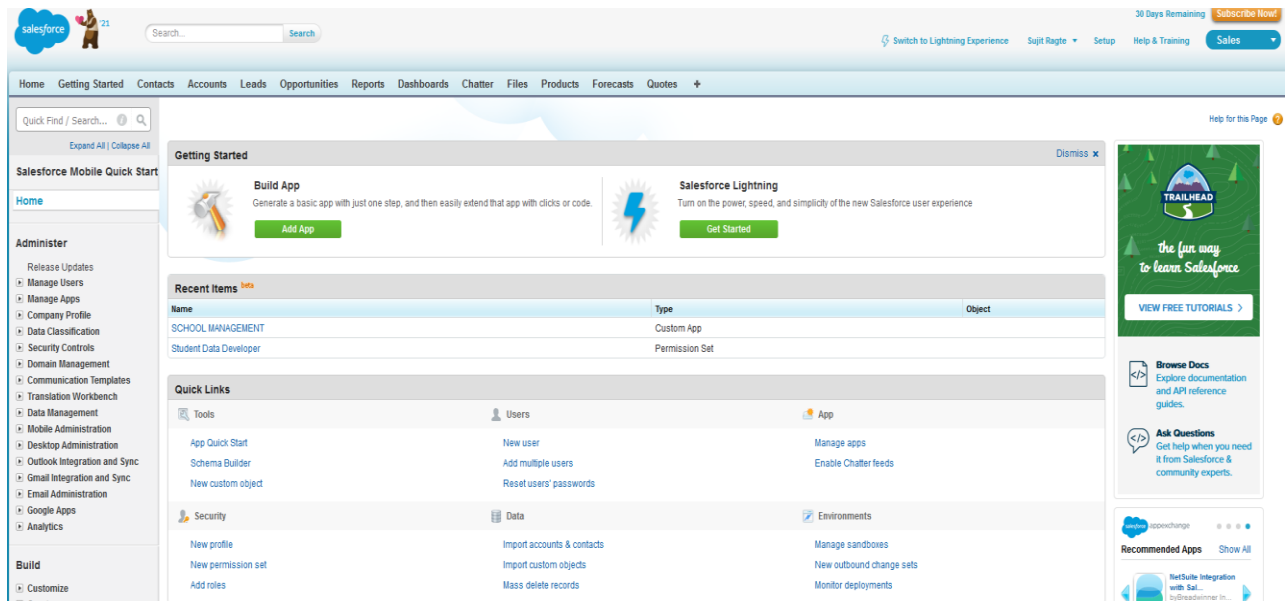
Select and Click on Try for Free

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.
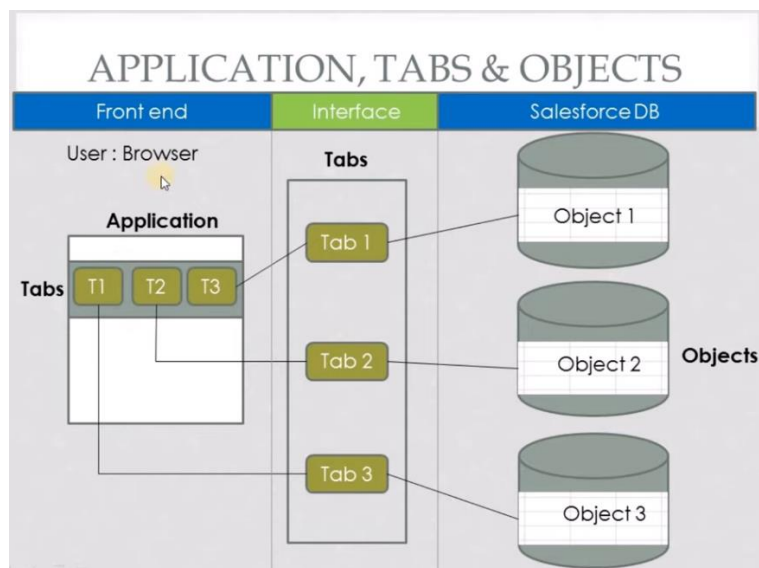
--Go to Salesforce Home page (Login)

--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
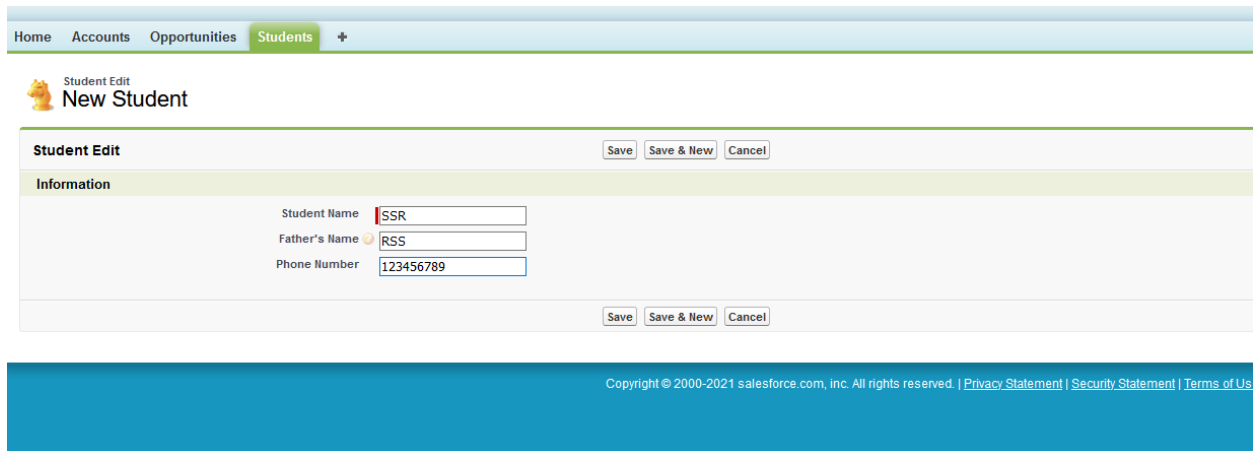
-Click on the tab Student

-Now, you have access to your Students Object

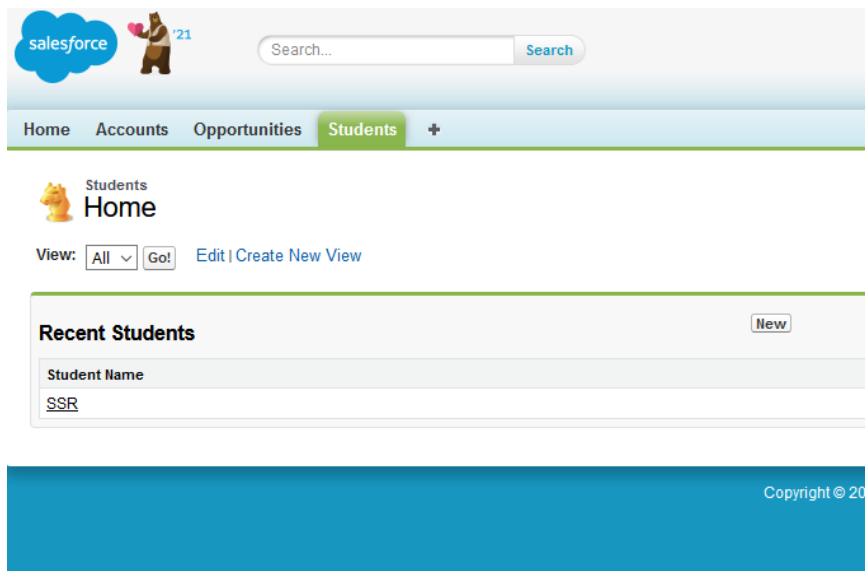-To Create a record in your students Object, Click on New

-Enter the details

And Click on Save

Record is created in Custom Object

Click on the tab again

Recent Created Record is visible.

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