

SalesForce Admin

Module 3

Data Modeling



Data Modeling in Salesforce





Certification Questions.

1. What are two considerations an administrator should keep in mind when working with Salesforce objects?
Choose 2 answers
 - a. **Custom and standard objects have standard fields.**
 - b. **Standard objects are included with Salesforce.**
 - c. A new standard object can be created.
 - d. Only standard objects support master-detail relationships.
2. Cloud Kicks wants to track shoe designs by products. Shoe designs should be unable to be deleted, and there can be multiple designs for one product across various stages. Which two steps should the administrator configure to meet this requirement? Choose 2 answers
 - a. **Add a custom master-detail field for shoe designs on the Product object,**
 - b. **Create a custom object for shoe designs.**
 - c. Use the standard object for designs.
 - d. Configure a custom lookup field for shoe designs on the Product object.
3. Cloud Kicks has decided to delete a custom field. What will happen to the data in the field when it is deleted?
 - a. The data in the field is stored for 20 days.
 - b. **The data is permanently deleted.**
 - c. The data associated with the field is required.
 - d. The data is restorable from the recycle bin.

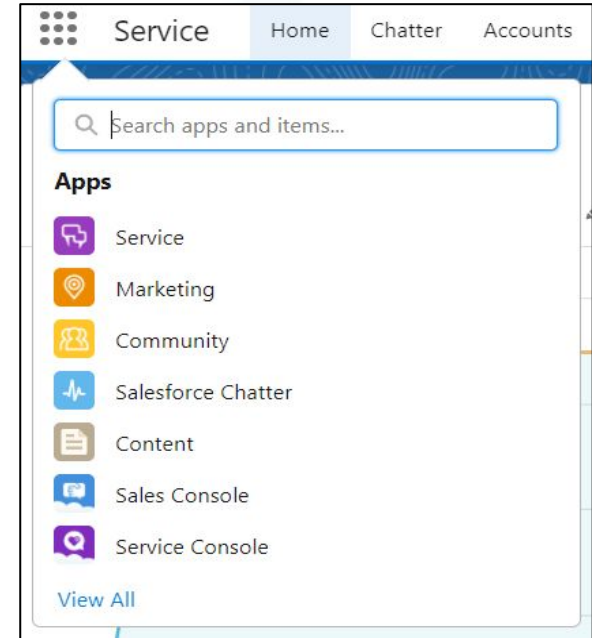
4

Topic: Apps and Tabs in Salesforce



Apps in Salesforce

- **Apps:**
 - An app is a collection of objects that work together to serve a particular function.
 - For example: Marketing app will be used by Marketing department and will include common tasks and functions that are needed for marketing purposes.
 - Simply put, an App in Salesforce is basically a collection of Tabs (Objects) in one screen. This makes it easier for a new user to use the system since they will open their relevant app and only see objects that they need to work with.





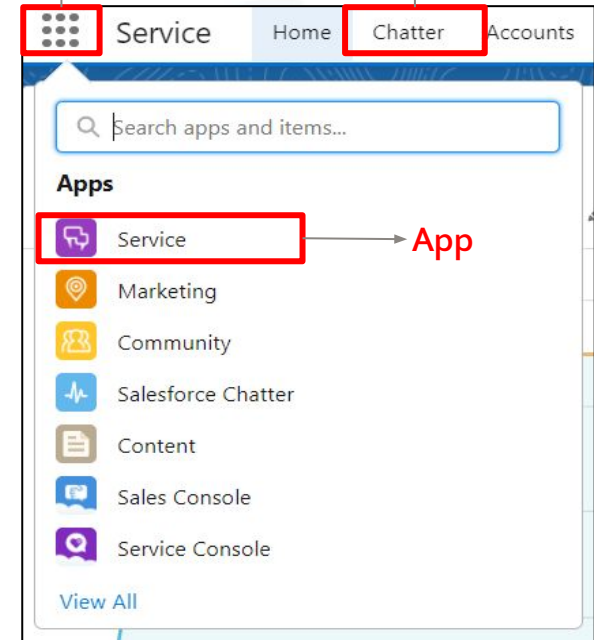
Types of Apps

Basically there are 2 types of Apps

- **Standard App:**
 - By default, salesforce provides some applications ready to use.
 - E.g: Sales, Marketing, Salesforce Chatter, Community etc.
 - The logo, description and label of the standard application **cannot be changed**.
- **Custom App:**
 - Its functionality looks the same as standard applications, but it is just **created to meet the specific requirements and needs of the business**.
 - Logo can be added.

App Picker /
App Launcher

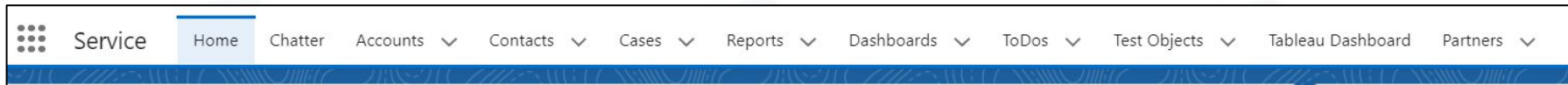
Tab





Tabs in Salesforce

- **Tabs:**
 - Tabs in Salesforce help users view the information at a glance.
 - It displays the data of objects and other web content in the application.
 - Simply put, a Tab represents an Object in Salesforce.
 - And we know that an Object is more or less a database table represented in a certain way.






Types of Tabs

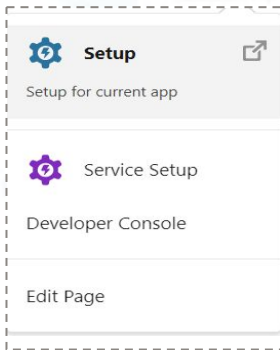
There are 4 types of Tabs

- **Standard object tabs:** It shows the data related to standard objects.
- **Custom object tabs:** Custom tab is created for showing the data of the custom objects in salesforce.
 - Their tabs look the same as standard object tabs
- **Web tabs:** External web pages and web based applications are shown by web tabs.
- **Visualforce tabs:** It shows visualforce pages (these are pages that are developed through custom coding).



How to Create an App in Salesforce

- In your Salesforce org, click  on the top right and select Setup to open Setup.



- In the Home tab in Setup, search for **App Manager** in the Quick Find Box and click on App Manager.



How to Create an App in Salesforce

- Click on New Lightning App
- Enter an App Name
 - For now write **Yoll App**
 - The Developer Name will populate automatically. If not, write Yoll_App
- Leave everything else as it is and Click **Next**

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ⓘ

Yoll App

* Developer Name ⓘ

Yoll_App

Description ⓘ

Enter a description...

App Branding

Image ⓘ

Upload

Primary Color Hex Value ⓘ

■

#0070D2

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

YA

Yoll App



How to Create an App in Salesforce

- For Navigation Style choose **Standard Navigation**.
- For Supported Form Factors choose **Desktop and Phone**
- For Setup Experience choose Setup(full set of Setup options)
- Leave everything else as it is and Click **Next**.
- In the Utility Item screen, leave as it is and Click **Next**.

New Lightning App

App Options

Navigation and Form Factor ⓘ

* Navigation Style

- ☒ Standard navigation
- ☐ Console navigation

* Supported Form Factors

- ☒ Desktop and phone
- ☐ Desktop
- ☐ Phone

Setup and Personalization ⓘ

Setup Experience

- ☒ Setup (full set of Setup options)
- ☐ Service Setup

App Personalization Settings

- ☐ Disable end user personalization of nav items in this app
- ☐ Disable temporary tabs for items outside of this app



How to Create an App in Salesforce

- In the Navigation Items screen, choose tabs from the left window that you want to have in your App and move them to the right window.
- In this scenario, Move **Accounts**, **Leads**, **Contacts**, **Opportunities** from the Available items Window to the Selected Items Window.
- Leave everything else as it is and Click **Next**

New Lightning App

Available Items

Create

Alert Settings

All Sites

Alternative Payment Methods

App Launcher

Approval Requests

Asset Action Sources

Asset Actions

Asset State Periods

Assets

Async Operation Logs

Selected Items

Accounts

Leads

Contacts

Opportunities



How to Create an App in Salesforce

- Choose **System Administrator** from the Available Profiles Window and move it to the Selected Profiles Window.
- Click **Save & Finish**
- To view the App, click on the App Launcher and search for **Yoll App** and click on it.

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
Authenticated Website
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile

Selected Profiles

System Administrator



Usage Example of Apps & Tabs

Let's say we have a Car selling business and we have two teams amongst others in our organization, Marketing and Customer Service, working on Salesforce. Both teams use Salesforce for different purposes.

The Marketing team uses it to oversell to existing customers and to track Leads and Nurture them into becoming customers and buying cars. The Customer Service team is responsible to provide post-sale service to Customers who are having trouble with their Cars, repairing and maintenance along with warranty claims etc.

To ensure smooth usage of Salesforce between the two teams, having Apps and Tabs is the perfect solution. We will have two separate Apps, Marketing app and Service app, for the two teams respectively. Inside the Apps we will put relevant Tabs to ensure ease of use.

So the Marketing App will only have Tabs (Objects) relevant to Marketing such as, Leads, Opportunities, Products, Quotes, Contacts etc.

The Service App will only have Tabs (Objects) relevant to a Customer Service agent such as, Cases, Tickets, Reports, Accounts etc.

Separate Apps & Tabs will ensure that both teams login and go to their relevant app where they will only see Objects and data that they need to work with. This will make the CRM look less cluttered for non-seasoned users and ensure smooth usage.

Accounts
All Accounts ▾

New Import Printable View

14 items • Sorted by Account Name • Filtered by All accounts • Updated a few seconds ago

Search this list...



	Account Name ↑	Account Site	Billing State/Province	Phone	Type	Account Owner Alias	
1	<input type="checkbox"/> Burlington Textiles Corp of America		NC	(336) 222-7000	Customer - Direct	MFero	▼
2	<input type="checkbox"/> Dickenson plc		KS	(785) 241-6200	Customer - Channel	MFero	▼
3	<input type="checkbox"/> Edge Communications		TX	(512) 757-6000	Customer - Direct	MFero	▼
4	<input type="checkbox"/> Express Logistics and Transport		OR	(503) 421-7800	Customer - Channel	MFero	▼
5	<input type="checkbox"/> GenePoint		CA	(650) 867-3450	Customer - Channel	MFero	▼
6	<input type="checkbox"/> Grand Hotels & Resorts Ltd		IL	(312) 596-1000	Customer - Direct	MFero	▼
7	<input type="checkbox"/> Hooli Corp		Pennsylvania	+1 (786) 8885353	Prospect	MFero	▼
8	<input type="checkbox"/> Pyramid Construction Inc.			(014) 427-4427	Customer - Channel	MFero	▼
9	<input type="checkbox"/> Sample Account for Entitlements					autoproc	▼
10	<input type="checkbox"/> sForce		CA	(415) 901-7000		MFero	▼
11	<input type="checkbox"/> United Oil & Gas Corp.		NY	(212) 842-5500	Customer - Direct	MFero	▼
12	<input type="checkbox"/> United Oil & Gas, Singapore		Singapore	(650) 450-8810	Customer - Direct	MFero	▼
13	<input type="checkbox"/> United Oil & Gas, UK		UK	+44 191 4956203	Customer - Direct	MFero	▼
14	<input type="checkbox"/> University of Arizona		AZ	(520) 773-9050	Customer - Direct	MFero	▼