SALESFORCE (company name, product name)

IAAS/PAAS/SAAS

* It is a subscription model
* Cloud Computing
* Multitenant Environment – everyone is sharing the same resources

Org – some space that you have on the cloud such as a virtual server

* Aw computing

SALESFORCE PAAS PLATFORM

* FORCE.COM
* Secondary (SALESFORCE1) –

SAAS – OUT OF THE BOX

* Sales cloud : for sales operation

1. Marketing 🡪 **LEAD**(future prospect)

* Service cloud: case management

|  |  |  |
| --- | --- | --- |
| **STEPS** | **SALES** | **SERVICE** |
| MARKETING 🡪 | 1. LEAD   Following for  (Business Account)   1. Account 2. Contact   (for CUSTOMER ACCOUNT)  2+3 Combined into one PERSON ACCCOUNT   1. Opportunity (closed/lost or closed/win) 2. Price Book (menu card) 3. Product | 1. Case |
|  |  |  |
|  |  |  |
|  |  |  |

B TO B – BUSINESS TO BUSINESS

B TO C – BUSINESS TO CUSTOMER

ACCOUNTS:

* Business Account and Person Account

**360-degree view**

**Programmatic and Declarative**

* OBJECT: a whole file such as an xl sheet.
* FIELD NAMES
* VALUES

All above is metadata(configuration)

* RECORD/s 🡪 DATA(values)

A saved shortcut is called a **TAB ( only inserting NO CONFIGURATION)**

**Record view: after creating**

**YOU CAN NOT HAVE A USER TAB**

This Year – dynamic expression

* Start date and end date: fiscal year

Company is divided into 3 parts

1. INFO – preference
2. FINANCIAL INFO
3. SUPPORT INFO

SECURITY:

* USERNAME AND PASSWORD
* IP RESTRICTIONS

1. Start IP and End IP
2. Trusted IP
3. Login hours

LOGIN IP – profiles specific users

TRUSTED IP – for the whole org – for everybody

NOTES

5/11/2018

Multi currency enabled vs disabled.

EDIT LAYOUT VS DETAIL LAYOUT – both related to records

Records get currency preferences over user and org

<https://na59.salesforce.com/006f400000BWMit>

the rated exchange rate only effects Opportunity records (specifically the close date).

Salesforce supports two types of objects

Standard: USER, ACCOUNTS, OPPORTUNITIES, ETC vs

Custom objects: you get 4 default fields

Name- only name text/field type t can be changed

created by, date, modified, currency – cannot be changed

Skinny tables – combination of standard + custom field tables

FLS -Field-level security

VISIBLE checked means that the field can be editable

Ready only means that it can be seen but not editable.

Two relationships between two tables

Salesforce only supports one to many relationship.

What to do if a child table records exists when creating a master-record lookup relationship.: either delete or update existing child records with record-lookup field then change to master

<https://na59.salesforce.com/a06f40000047rZT>

junction object is used to create a N:N relationship.

TOPICS TO COVER:

FIELDS

Multicurrency

Object

Creation of above including data types.

What is salesforce

Login ip ranges, trusted ip, business hours