

Day 3: Salesforce Training by TCS & SmartBridge

What we Learnt today

1. What is Application and its Type
 2. How to create Application (Eg: TCS_LM_SF)
 3. What is Relationship and Types of Relationship in Salesforce
 4. Creating Object using Schema Builder and Page Layout
 5. Connecting Two Object via Lookup Relationship
-

What is Application & its Type

Application in Salesforce

- A **Salesforce App** is a **container** that groups related functionality (like objects, tabs, and components).
- Users can switch between apps from the **App Launcher**.
- Apps simplify user experience by showing only what's relevant to their role or task.

Types of Applications in Salesforce

1. Standard Apps

- Provided by Salesforce by default
- Include pre-configured tabs and functionality
- Examples:
 - **Sales** – Manage leads, opportunities, and accounts
 - **Service** – Case management and customer support
 - **Marketing, Community, Chatter**

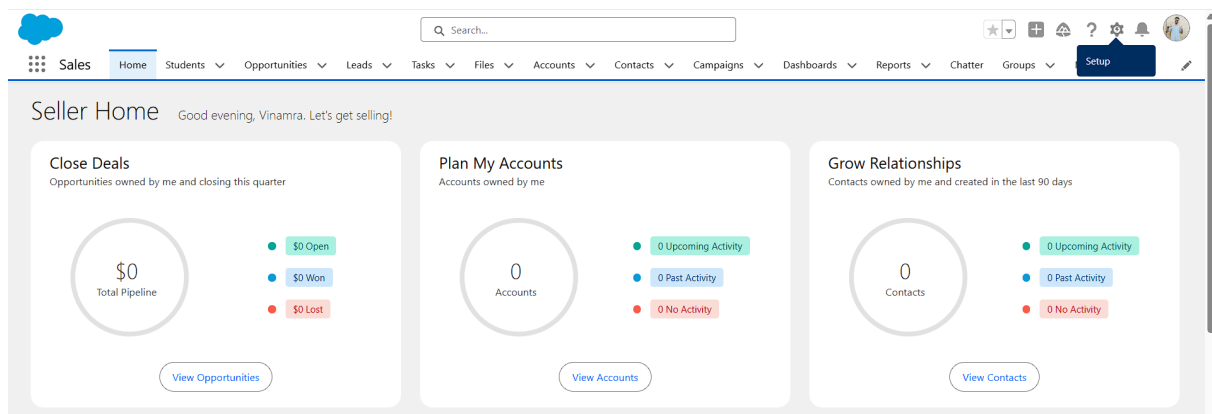
2. Custom Apps

- Created by users or admins to meet specific business needs
- Can include **custom objects, fields, reports, dashboards**
- Examples:
 - **Student Management App**
 - **Inventory Management**
 - **Event Registration**

How to create Application (Eg: TCS_LM_SF)

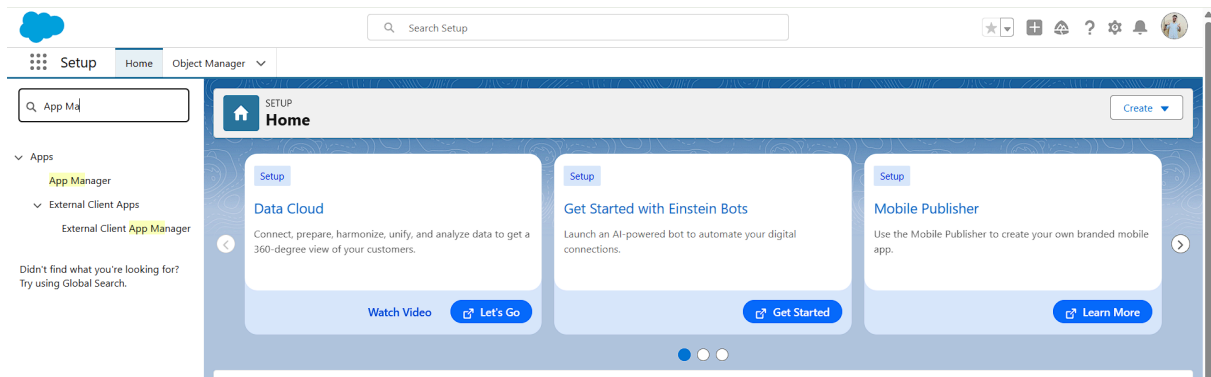
Step 1: Open Salesforce Setup

1. Log in to your **Salesforce Developer Org**
2. Click the **Gear icon (⚙️)** → Choose **Setup**



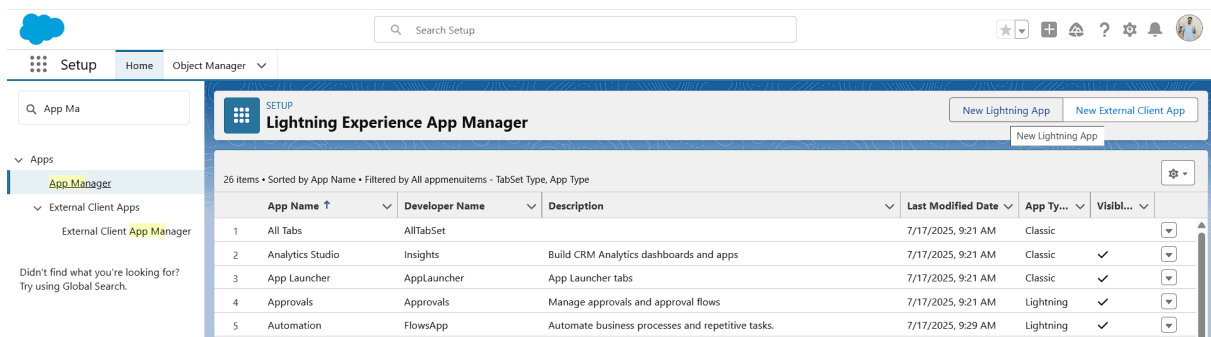
Step 2: Go to App Manager

1. In the **Quick Find box**, type: **App Manager**
2. Click **App Manager** under **App**



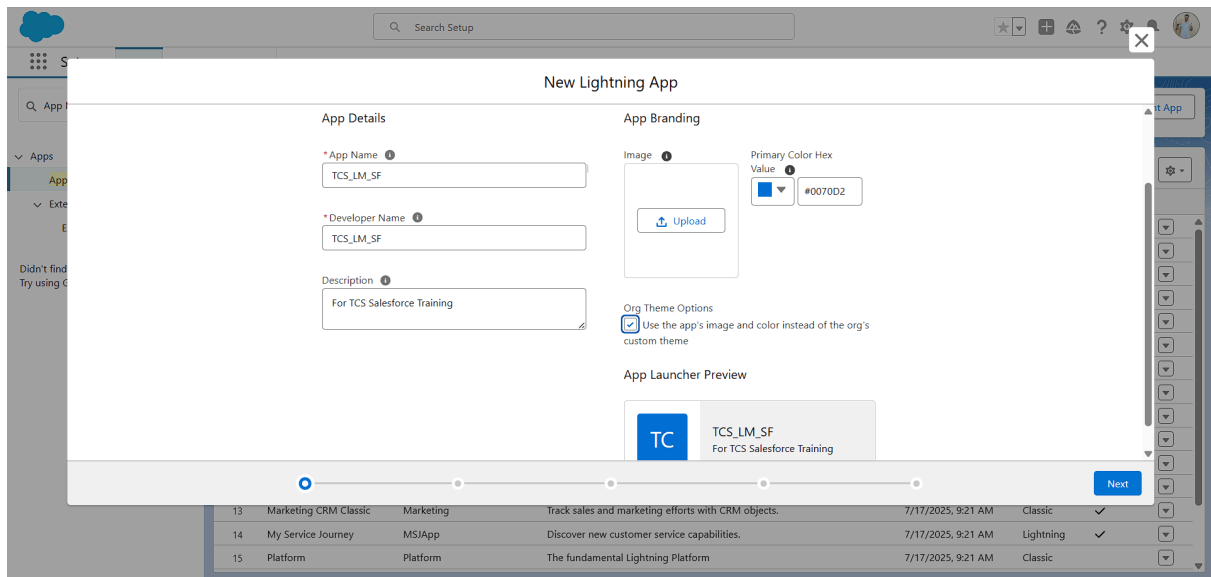
Step 3: Create New Lightning App

1. Click the **"New Lightning App"** button (top-right)



Step 4: App Details & Branding

1. App Name: **TCS_LM_SF**
2. Developer Name: Auto-filled as **TCS_LM_SF**
3. (Optional) Add **logo** and **color theme**
4. Click **Next**



Step 5: App Options

Check options as needed:

- ☒ *Standard Navigation* (for desktop)
- ☒ *Setup App for mobile* (optional)

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

☐ Data Cloud Setup

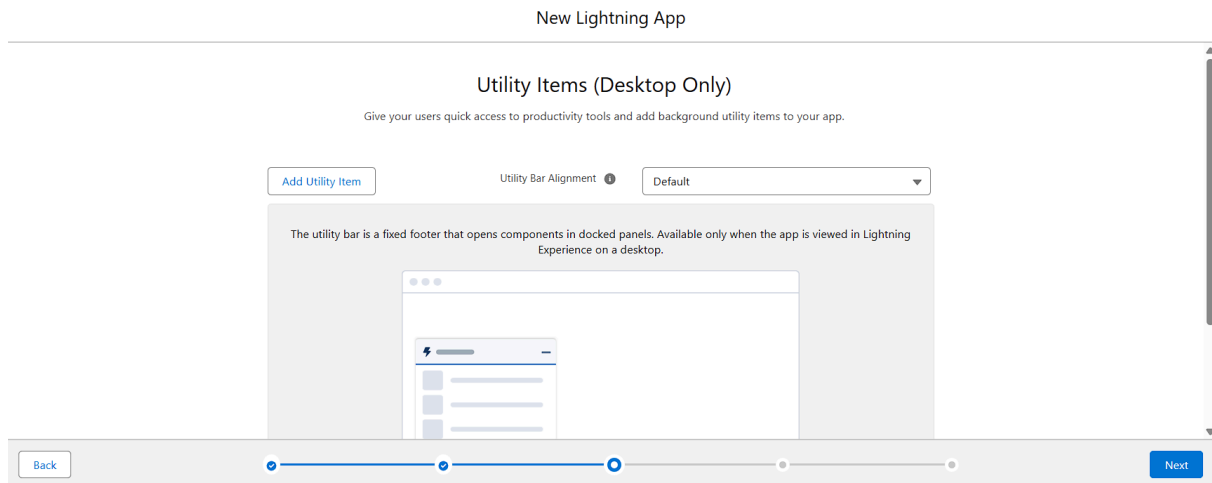
App Personalization Settings

☐ Disable end user personalization of nav items in this app

☐ Disable temporary tabs for items outside of this app

☐ Use Omni-Channel sidebar

Next



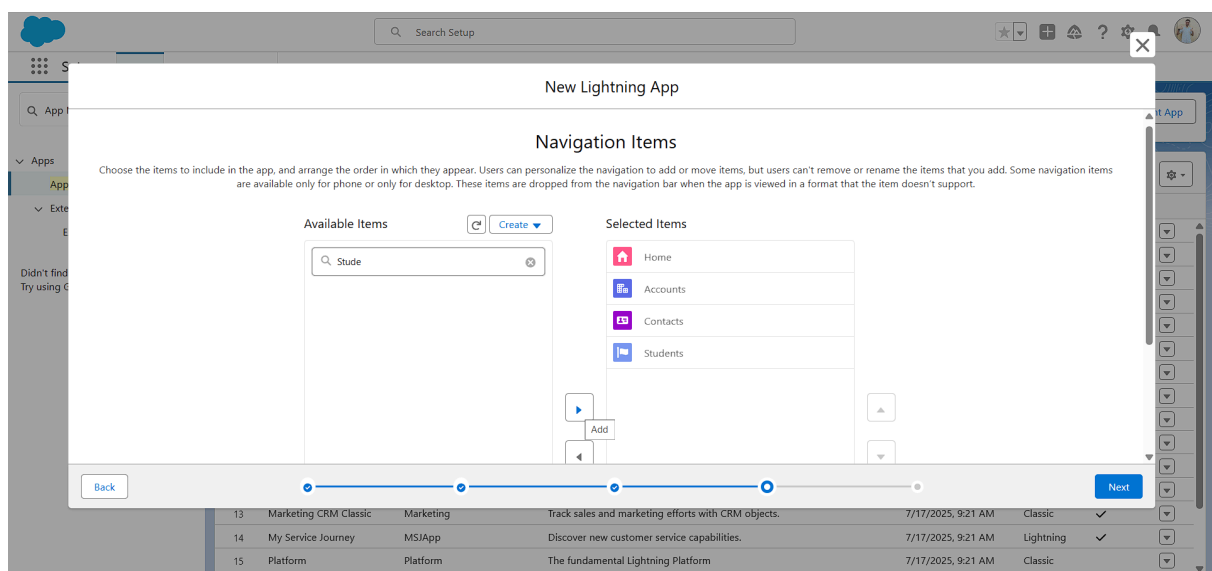
Step 6: Select Navigation Items (Tabs)

1. Add the tabs (objects) you want in the app:

- Home
- Account
- Contacts
- Students

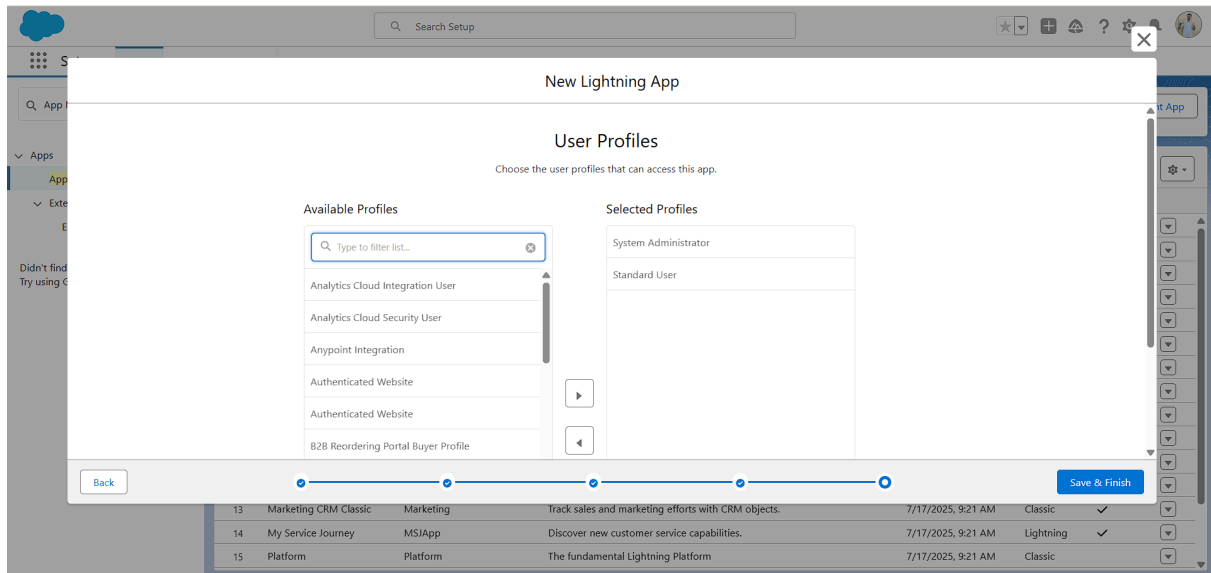
Use the  button to move items from **Available Items** to **Selected Items**

Click **Next**



Step 7: Set App Visibility & Access

- Select **profiles** that can access the app (e.g., System Administrator, Standard User)
- Click **Save & Finish**



✅ **Done! Your **TCS_LM_SF** App is Ready!**

To use the app:

- Click the **App Launcher (9 dots icon)** in the top-left corner
- Search for and open **TCS_LM_SF**

The screenshot shows the Salesforce Lightning Experience App Manager interface. At the top, there are tabs for 'Setup', 'Home', and 'Object Manager'. A search bar is visible with the text 'TCS_LM_SF'. Below the search bar, a list of apps is displayed, including 'TCS_LM_SF'. To the right, a table lists various apps and their developer names.

App Name	Developer Name
All Tabs	AllTabSet
Analytics Studio	Insights
App Launcher	AppLauncher
Approvals	Approvals
Automation	FlowsApp
Bolt Solutions	LightningBolt

The screenshot shows the Salesforce dashboard for the user 'TCS_LM_SF'. The dashboard includes a 'Quarterly Performance' section with a line chart showing 'CLOSED \$0', 'OPEN (>70%) \$0', and 'GOAL --'. Below the chart, there are sections for 'Today's Events' and 'Today's Tasks'. On the right side, there is an 'Assistant' panel with a message: 'Nothing needs your attention right now. Check back later.'

What is Relationship and Types of Relationship in Salesforce

What is a Relationship in Salesforce?

A **relationship** connects one object to another, allowing you to:

- Reference fields from related records

- Navigate between related records (parent ↔ child)
- Share data and set visibility/access
- Create automation rules (workflows, process builder, Apex)

Types of Relationships in Salesforce

1. Lookup Relationship

- **Loose association** between objects (like optional links)
- Child can exist **without** parent
- Parent and child are **independent**
- Example: `Student__c` has a lookup to `Course__c` (Student may or may not be assigned a course)

Key Points:

- One-to-one or one-to-many
 - You can create **cross-object formulas**
 - Deleting parent does **not delete** child
-

2. Master-Detail Relationship

- **Tightly coupled** relationship
- Child record **depends on** parent
- If the parent is deleted, **child is also deleted**
- Useful for **roll-up summary fields**

Key Points:

- Always required (cannot be null)
 - Inherits parent's sharing & security settings
 - Child record has no owner field
-

◆ 3. Many-to-Many Relationship

- Created using a **junction object**

- Each record in one object can be linked to **multiple records** in another object (and vice versa)
- Achieved by using **two master-detail relationships** on the junction object

Example:

- **Student__c** ↔ **Course__c** via a **Registration__c** object

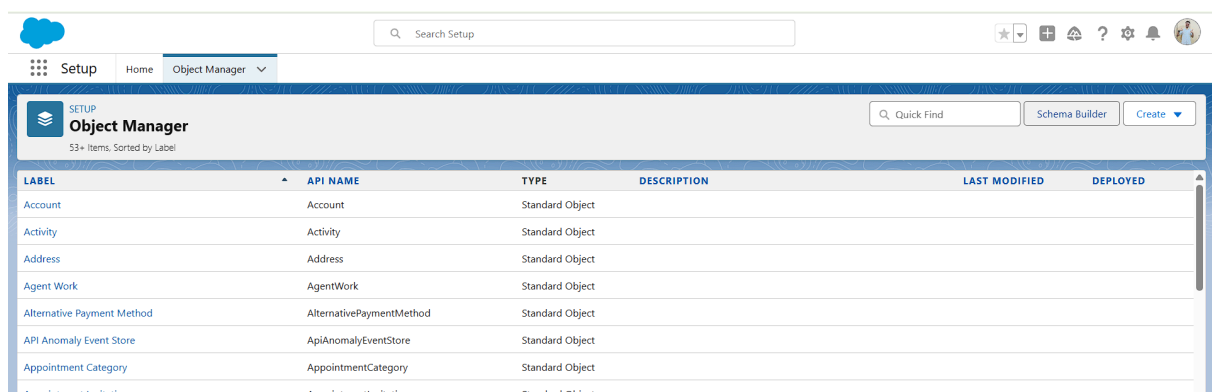
(A student can register for many courses, and a course can have many students)

Creating Object using Schema Builder and Page Layout

Part 1: Create Object Using Schema Builder

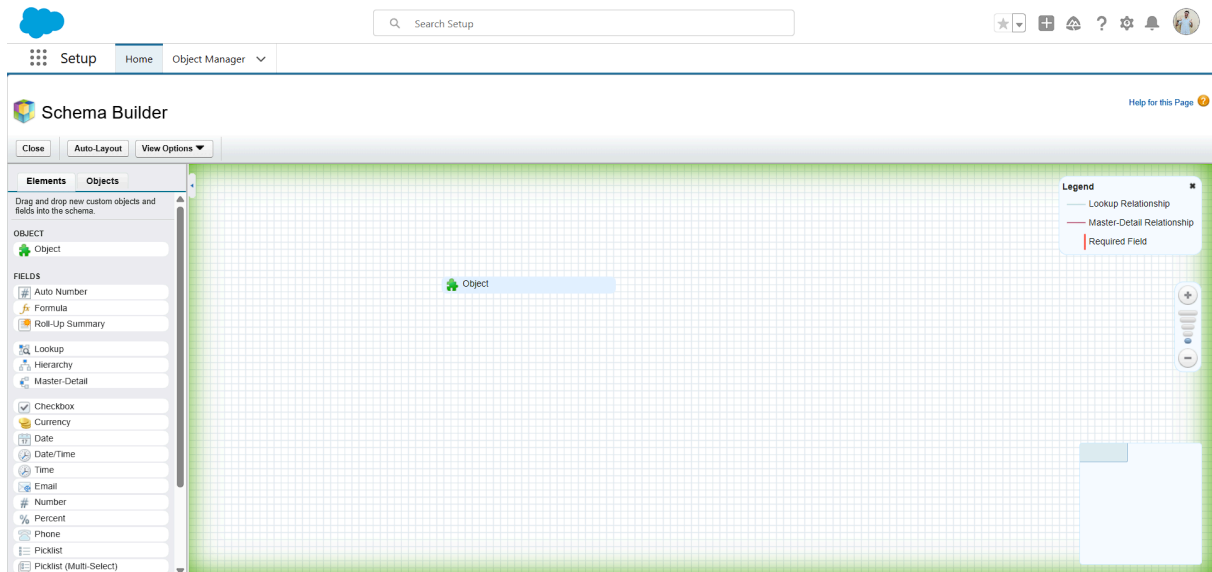
Step 1: Open Schema Builder

1. Go to **Setup**
2. In the **Quick Find box**, type: **Schema Builder**
3. Click **Schema Builder** under **Objects and Fields**



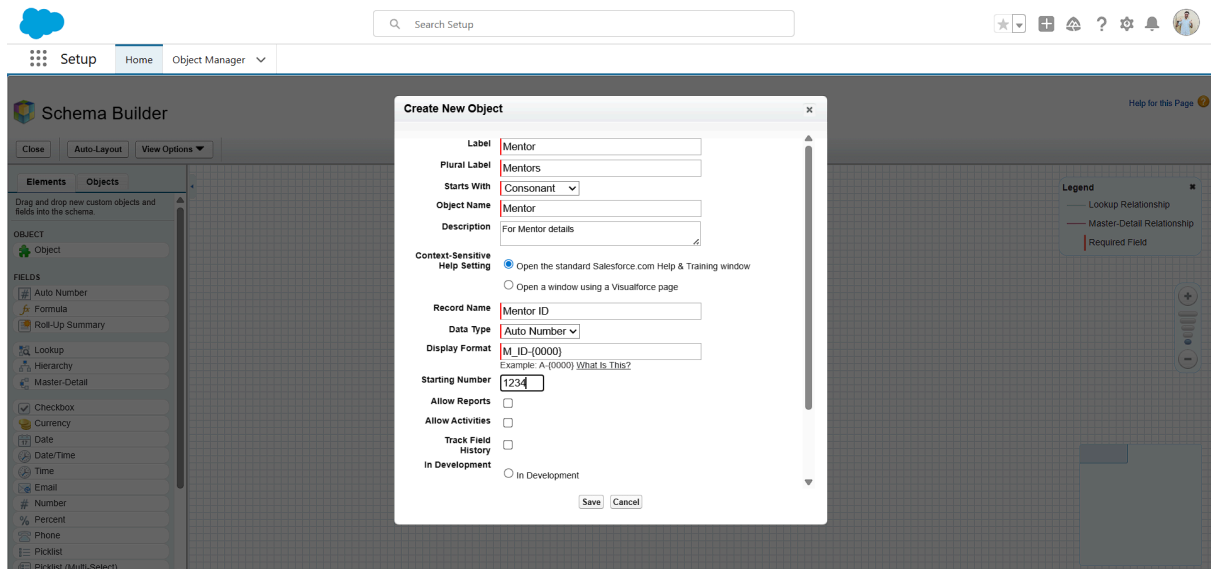
Step 2: Use Schema Builder to Create Object

1. In Schema Builder, click the **"Elements" panel** on the left.
2. Drag and drop **Object** into the canvas area.



A pop-up appears. Fill the details:

Field	Value
Label	Mentor
Plural Label	Mentors
Object Name	Mentor__c
Record Name	Mentor ID
Data Type	Auto Number
Display Format	M_ID-{0000}
Starting Number	1234
Allow Reports	<input checked="" type="checkbox"/>
Track Field History	<input checked="" type="checkbox"/>
Allow Activities	<input checked="" type="checkbox"/>



1. Click **Save**

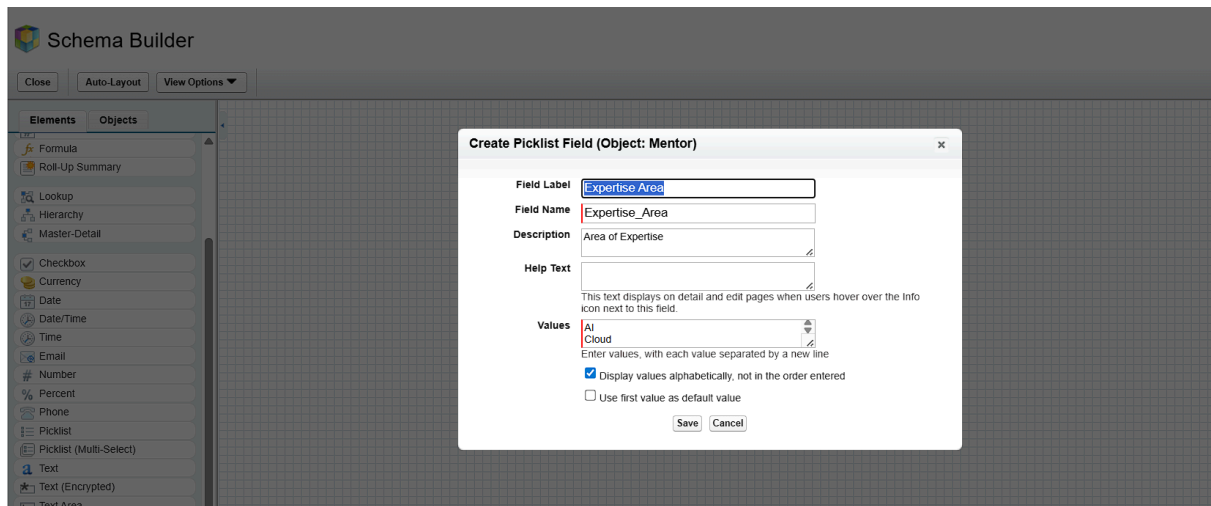
✓ Now your **Mentor** object is created.

Step 3: Add Fields to Mentor (Optional via Schema Builder)

1. From the left panel, drag a field type (e.g., Text, Number, Picklist) onto the **Mentor object box**.
2. Fill in the **Field Label**, **Length** (for text/number), etc.
3. Click **Save**

📌 Example Fields:

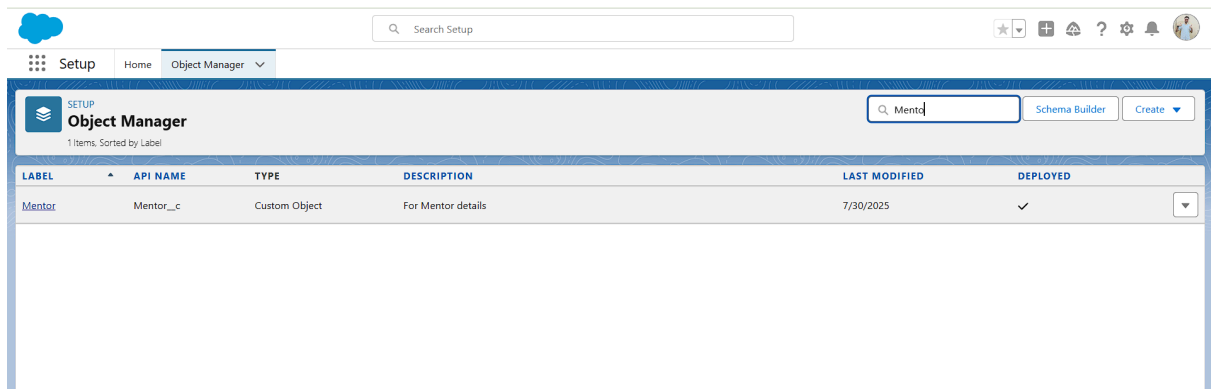
- **Mentor Name**
- **Expertise Area** (Picklist: AI, Cloud, DevOps, Data)
- **Email** (Email)



✓ Part 2: Customize Page Layout of Mentor Object

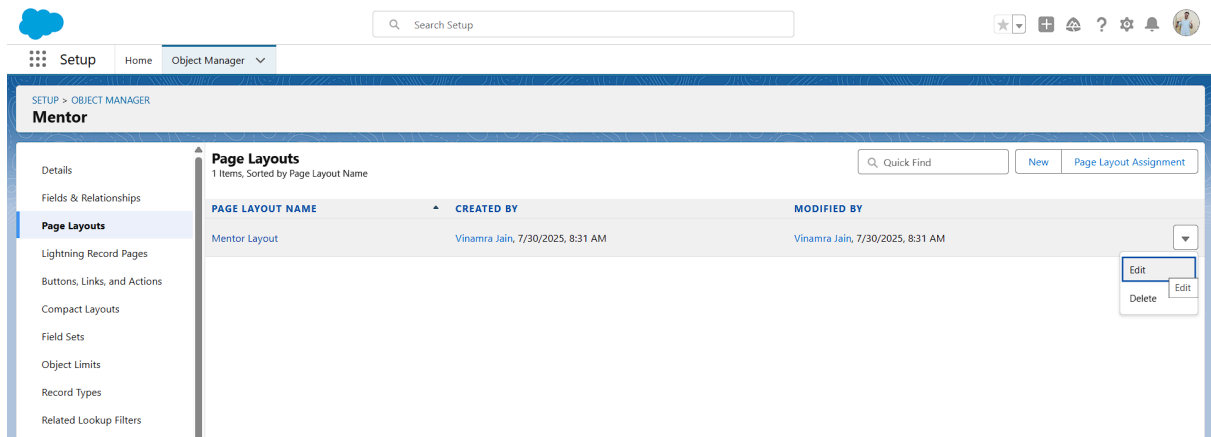
Step 1: Go to Object Manager

1. Go to **Setup**
2. In the **Quick Find**, type **Object Manager**
3. Click **Mentor**



Step 2: Access Page Layout

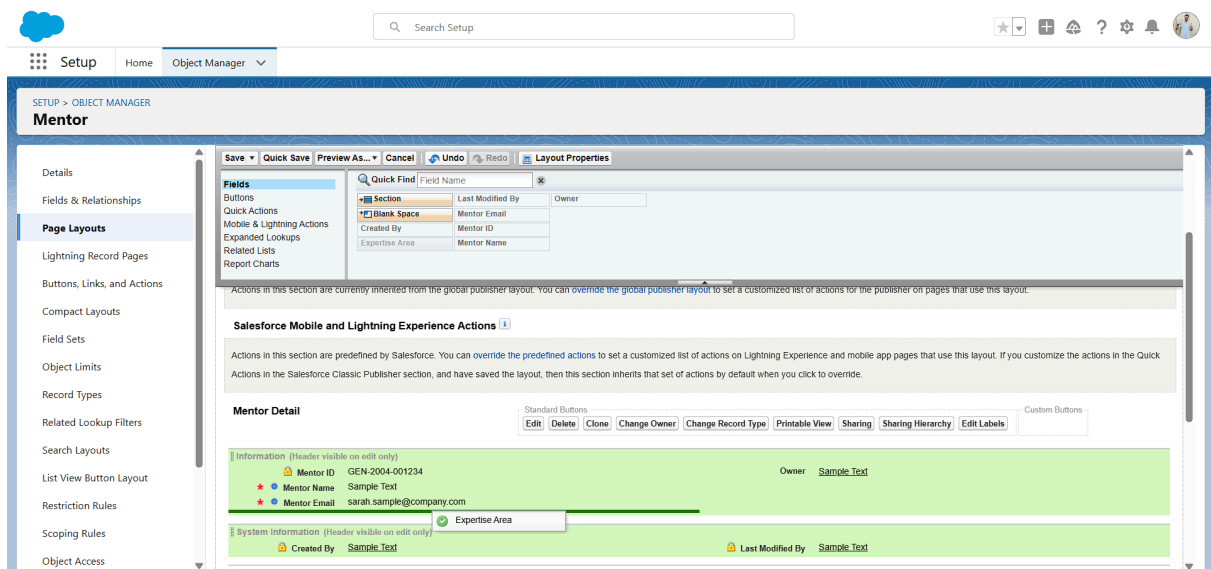
1. In the Mentor object settings, click **Page Layouts**
2. You'll see a default layout: **Mentor Layout**
3. Click on **Edit**



Step 3: Customize the Page Layout

- **Drag and drop fields** from the top into the layout
- You can also:
 - Add **Sections** to group fields
 - Reorder or remove unnecessary fields
 - Add **Related Lists** (e.g., if you relate Mentors to Students)

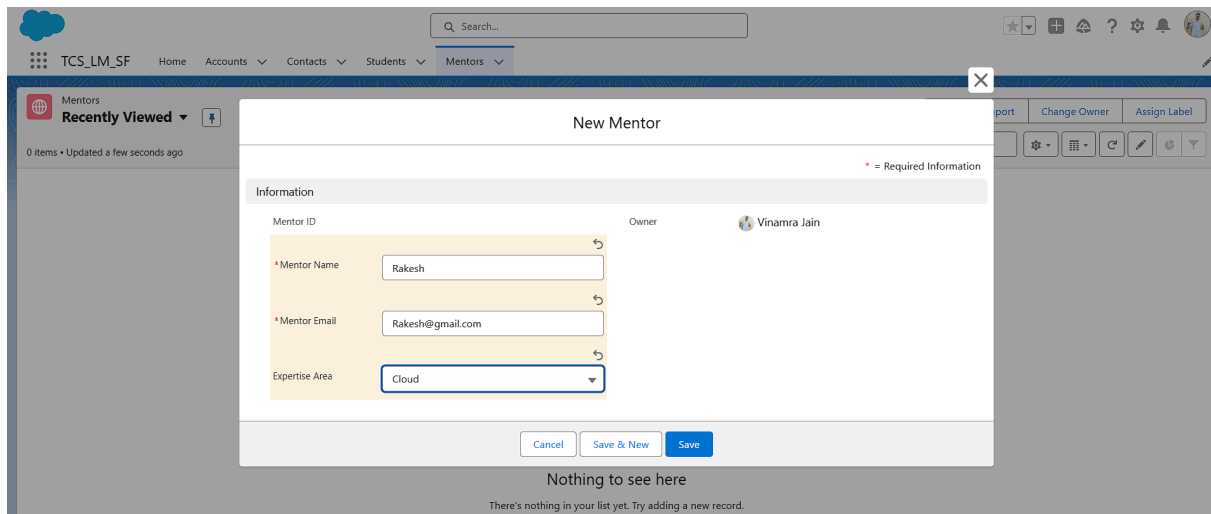
1. Click **Save**



Result:

- Your **Mentor** object is now created and fully configured.

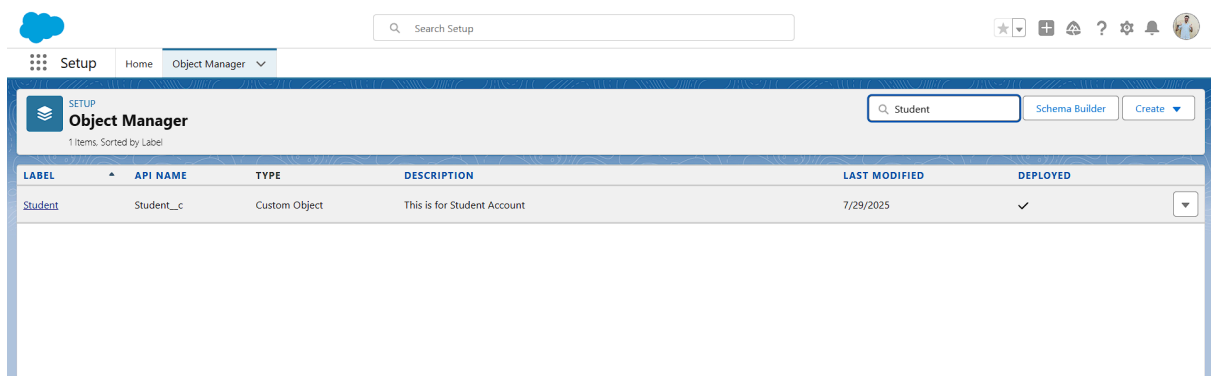
- You can now create Mentor records from the **App Launcher** (create a tab if needed).



Connecting Two Object via Lookup Relationship

◆ Step 1: Go to Object Manager

- Click the **Gear Icon (⚙️)** → Choose **Setup**
- In the **Quick Find**, type: **Object Manager**
- Click on the object where the relationship field will be **added**
→ For example, click **Student**



LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Student	Student_c	Custom Object	This is for Student Account	7/29/2025	✓

◆ Step 2: Add a New Field

1. Inside **Student**, go to **Fields & Relationships**
2. Click **New**
3. Select **Lookup Relationship** and click **Next**

SETUP > OBJECT MANAGER
Student

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Specify the type of information that the custom field will contain.

Data Type

Select one of the data types below.

☐ None Selected

☐ Auto Number

☐ Formula

☐ Roll-Up Summary [\[i\]](#)

☒ **Lookup Relationship**

☐ Master-Detail Relationship

☐ External Lookup Relationship

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

[Next](#) [Cancel](#)

◆ Step 3: Choose Related Object

1. Choose **Mentor** as the target object
(This means you'll link each Student record to a Mentor)
2. Click **Next**

SETUP > OBJECT MANAGER
Student

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

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Restriction Rules

Scoping Rules

New Relationship

Help for this Page [?](#)

Step 2. Choose the related object

[Previous](#) [Next](#) [Cancel](#)

Select the other object to which this object is related.

Related To **Mentor**

[Previous](#) [Next](#) [Cancel](#)

◆ Step 4: Configure Field Details

Field	Value
Field Label	Mentor

Field	Value
Field Name	Mentor (auto becomes Mentor__c)
Description (optional)	Link to assigned mentor
Help Text (optional)	Select the mentor for this student

Click **Next**

The screenshot shows the Salesforce Setup interface for configuring a lookup field on the Student object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area is titled 'Step 3. Enter the label and name for the lookup field' and includes the following fields and options:

- Field Label:** Mentor
- Field Name:** Mentor
- Description:** Link to assigned mentor
- Help Text:** Select the mentor for this student
- Child Relationship Name:** Students
- Required:** ☐ Always require a value in this field in order to save a record.
- What to do if the lookup record is deleted?:** ☒ Clear the value of this field. You can't choose this option if you make this field required.
- ☐ Don't allow deletion of the lookup record that's part of a lookup relationship.
- Auto add to custom report type:** ☒ Add this field to existing custom report types that contain this entity.
- Lookup Filter:** Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

◆ Step 5: Set Field-Level Security

- Decide who can **see** and **edit** this field (keep visible for now)
- Click **Next**

The screenshot shows the Salesforce Setup interface for configuring field-level security for the lookup field. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area is titled 'Step 4. Establish field-level security for reference field' and includes the following information:

- Field Label:** Mentor
- Data Type:** Lookup
- Field Name:** Mentor
- Description:** Link to assigned mentor

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	<input type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

◆ Step 6: Add to Page Layout

- Choose the layout where you want this field to appear
- Click **Next** → **Save**

The screenshot shows the Salesforce Setup interface. The breadcrumb trail is: SETUP > OBJECT MANAGER > Student. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area is titled 'New Relationship' and 'Step 5: Add reference field to Page Layouts'. It shows a table with the following details:

Field Label	Mentor
Data Type	Lookup
Field Name	Mentor
Description	Link to assigned mentor

Below the table, there is a text box with the instruction: 'Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout. To change the location of this field on the page, you will need to customize the page layout.'

There are two checkboxes under 'Add Field':

- ☒ Page Layout Name
- ☒ Student Layout

At the bottom right, there are 'Previous', 'Next', and 'Cancel' buttons.

✓ Now what?

- Open any **Student** record.
- You'll now see a **Mentor field** (a lookup).
- You can click the **search icon** to select a **Mentor record** and link them.

The screenshot shows a Salesforce record form for a 'Student' record. The form is titled 'Information' and has a 'Required Information' label. The form fields are:

- * Student Name: student2
- Course: B.Tech
- * Roll Number: 10
- * Age: 20
- * Student Email: student2@gmail.com
- * Mobile Number: 9876543211
- Mentor: Search Mentors...

The 'Mentor' field is a lookup field, and the search dropdown is open, showing 'Recent Mentors' with the following results:

- M_ID-1234
- + New Mentor

At the bottom right, there are 'Save & New' and 'Save' buttons.