

Creating and Managing Custom and Standard Objects in Salesforce

UNDERSTANDING FIELDS, OBJECTS, AND THE
STANDARD OBJECT MODEL



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Overview



Recap: What are Objects, Fields, and Records?

Walk through the Object Manager

Explore common Standard Objects, including

- Leads and Opportunities
- Accounts, Contacts, and Person Accounts
- Cases
- .. And lots more

Import data into an Object

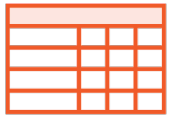
Discover rich and unique functions around Standard Objects



Recap: Objects, Fields, and Records



Imagine an excel file with three spreadsheets – Customers, Products, and Complaints



Objects in Salesforce are containers of data – think of it as a single spreadsheet



Fields are like columns in the spreadsheet. Customer object could have Name, Address, and Phone fields



Records are like rows in the spreadsheet – the actual data stored in an Object

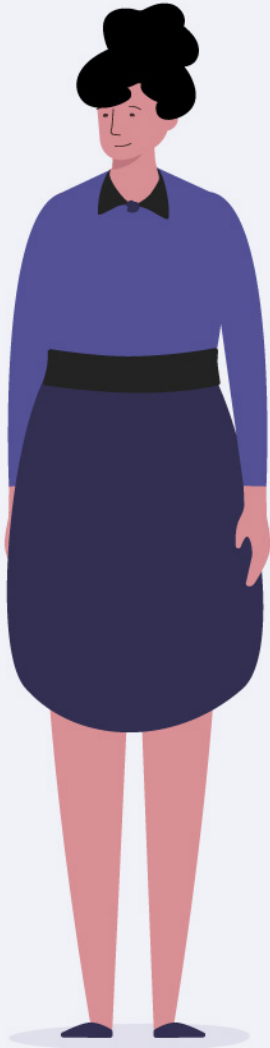




Soon-to-be world leader in personal robots

Humble beginnings .. But growing fast!





Meet Amanda

Handles customer complaints

A spreadsheet just doesn't cut it anymore

She discovers Salesforce!



Exploring Standard Objects

Leads and Opportunities

Potential customers
and deals you could
win

Accounts, Contacts, and Person Accounts

Companies and people
you are working with

Cases

Issues or work items
that need to be tracked,
worked, and completed



Demo



Explore common Standard Objects in the Object Manager

Quick peek at the different fields on the Contact and Case Objects

Load Amanda's data into Salesforce



Understanding Common Standard Fields



Fields You Will Find on (Almost) Every Object

Id

Auto-generated code
unique to every record

Name

A user-friendly “name”
for each record

OwnerId

Id of a User or Queue
that “owns” the record



Fields You Will Find on (Almost) Every Object: Audit Fields

LastModifiedById

Id of the user who last
changed the record

LastModifiedDate

Date and time at which a
user changed the record

SystemModstamp

Date and time the system
OR a user changed the
record

CreatedById

Id of user who created
the record

CreatedDate

Date and time at which
the record was created



Id

Globally unique code generated by Salesforce

15-digit and 18-digit representations

- 15 digit case-sensitive version
- e.g. *5003000000D8cul*
- 18 digit case-insensitive version
- e.g. *5003000000D8culQAA*

Cannot be changed or set by a user

First 3 digits identify the Object

- The 500 tells us it's a Case



Id

Name

The “user friendly” identifier of a record

Can be text or auto-number. Examples:

- WI-0015 could be a Work Item
- Marc Benioff could be a Contact
- R2-D2 could be a robot
- 00001031 could be a case number

Case doesn't have a Name – it has CaseNumber instead



Id

Name

OwnerId

Lookup to a User or a Queue

By default, the user who created the record

Drives visibility – in a “private” sharing model, only owners get access



Id

Name

OwnerId

LastModifiedById

Lookup to a User

The user who last changed the record

Cannot be changed by any user

- An admin secret: This value can be set only when creating data using a tool like Data Loader



Id

Name

OwnerId

LastModifiedById

LastModifiedDate

DateTime when the record was last modified by a user

Cannot be changed by the user

- Except by the secret admin technique



Id

Name

OwnerId

LastModifiedById

LastModifiedDate

SystemModstamp

DateTime when the record was last modified by a user OR the system

Cannot be changed by any user

- Not even through the secret admin way!



Id

Name

OwnerId

LastModifiedById

LastModifiedDate

SystemModstamp

CreatedById

Lookup to user who created record

Cannot be changed or set by the user

- Except the hero admin



Id

Name

OwnerId

LastModifiedById

LastModifiedDate

SystemModstamp

CreatedById

CreatedDate

DateTime when record was created

Cannot be changed or set by the user

- Except the hero admin



Demo



Explore the fields you'll see on every
Object



Exploring Standard Objects





Leads and Opportunities

The people and organizations that may be interested in your business



Leads: This Is Where Business Starts



The Lead Object captures basic info about potential customers

- E.g. Name, Contact

Generate Leads through web-to-lead and LinkedIn Lead Gen

Sync Lead info with third-party sources through Lightning Data and Data.com

Learn more about Leads through their social media presence

“Convert” leads to customers



Opportunities: Deals in Progress



Leads can be “converted” to Opportunities

Track the stage, competitors, probability, forecasts, etc.

Territory management and Opportunity teams for sophisticated sales strategies

Store details of people and the organization on related Account and Contact Objects





Accounts, Contacts, and Person Accounts

The people and organizations that
you do business with



Accounts: Organizations You Do Business With



Store information such as Name, Address and Contact info. etc.

Sync and import accounts from third-party repositories

Build hierarchies to better manage large accounts

Manage accounts through territories

Account Teams to collaborate on an account



Contacts: The People in Your Accounts



Store information about people like Name, Contact, etc.

Associate Contacts with Accounts – or multiple Accounts

- Or with other Objects – like Opportunities or Cases

Keep contact information in sync with third-party sources

Use hierarchies to capture reporting relations



Person Accounts: An Account and a Contact



What if you do business directly with people?

A Person Account is a mix of Account and Contact

- In the background, it is a single Account and a single Contact
- Utilize features of both Accounts and Contacts

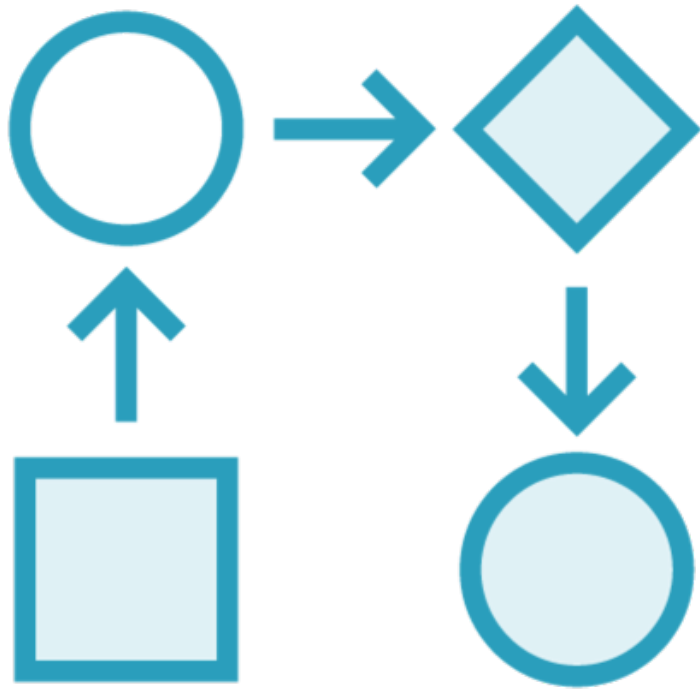


Case

A Case record represents a support case, an issue or a work item that needs to be tracked, worked, and closed.



Case: A Whole Case Management System



Create cases using web-to-case or email-to-case

Collaborate on a Case using the Chatter Feed and Case Teams

Collaborate on a Case with customers through emails, communities, and even offer self-service

Knowledge Articles to help solve cases

More when you learn about Service Cloud



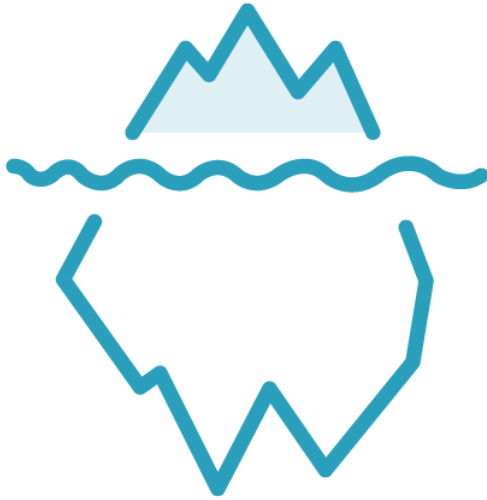


What About the Rest?

The Salesforce Documentation lists over 8,000 Standard Objects! But don't worry, we don't need to know most of them.



The behind-the-scenes Standard Objects



The Objects you see

The ones you work with the most- e.g. Case, Lead, Contract, Task



The behind-the-scenes Objects

You don't see them - but they're working hard behind the scenes!
We will get to know some of them



Keep exploring... The Object
Manager, the User Interface
and Salesforce Docs

