



--- Hands on

isobar

isobar

Welcome to **isobar.ch**
Portugal 

— Index

Week #1 – Practical Lesson #1

1. Developer Hub
2. Developer Org
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Developer hub

A place to start to be a Developer!

Go to <https://developer.salesforce.com/>

- Get technical documentation about Salesforce.
- Learn more about how use Salesforce, how develop apps, and many more.
- Know more about Tools related to Salesforce and development.
- Can connect with the Community and other users.
- News about Salesforce updates.

Developer Org

If you haven't done
this already

A developer org has all the features and licenses you need to get started with Salesforce Identity for Customers and Partners.

Go to <https://developer.salesforce.com/signup>.

1. Enter your contact information.
2. Enter a unique username.
3. Submit the form and wait for your welcome email.
4. In the welcome email, click the link to set your password.
5. That's it—you now have your own developer org.

Visual Studio Code

First, What's an IDE?

An IDE, or integrated development environment, typically consists of a code editor, build automation tools, a debugger, and intelligent code completion.



Visual Studio Code

Let's install it

You can install Visual Studio Code on any computer running macOS, Windows, or Linux.

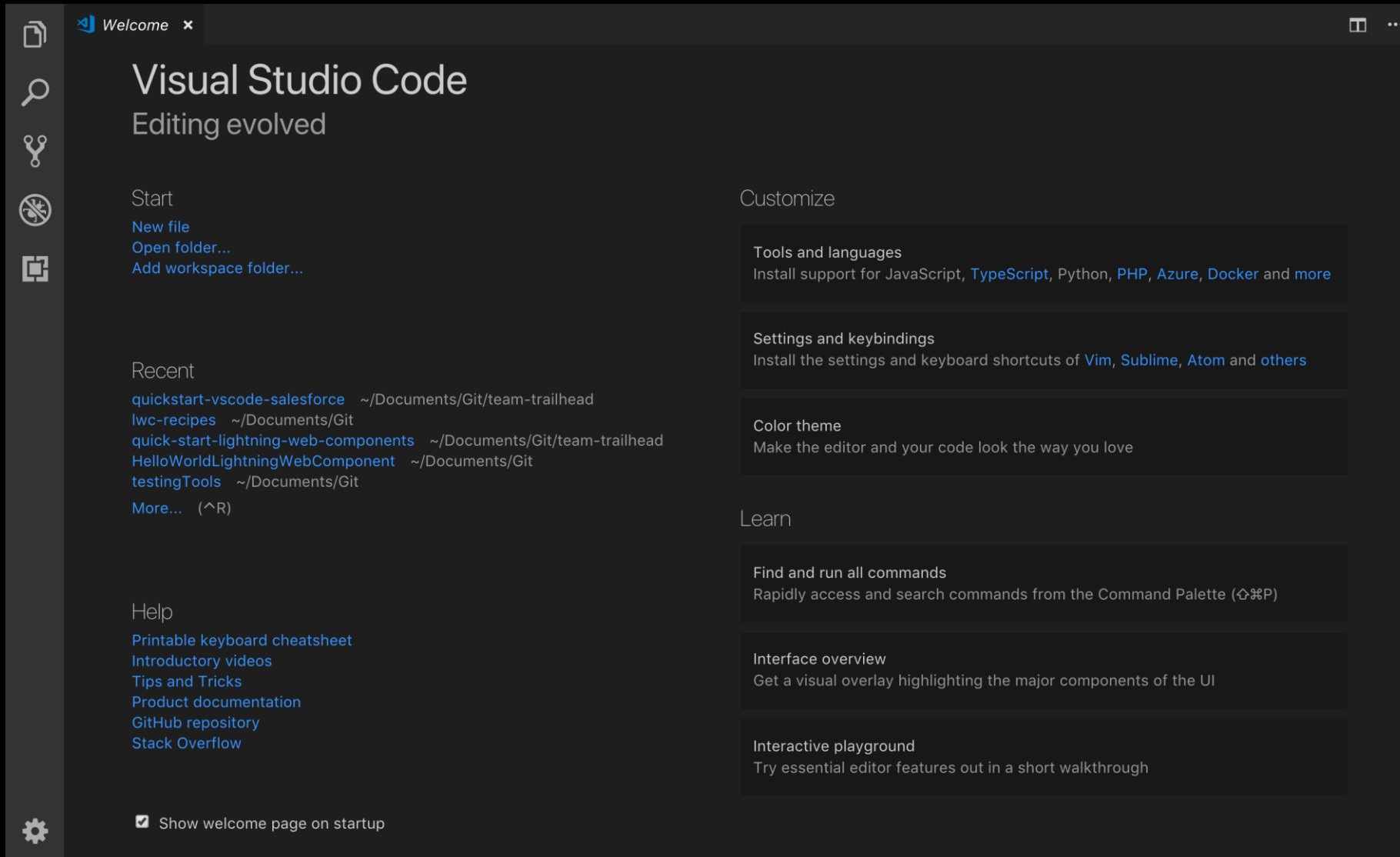
Download and install the latest version of [Visual Studio Code](#) for your operating system.

If you already have Visual Studio Code installed, there's no need to reinstall it.

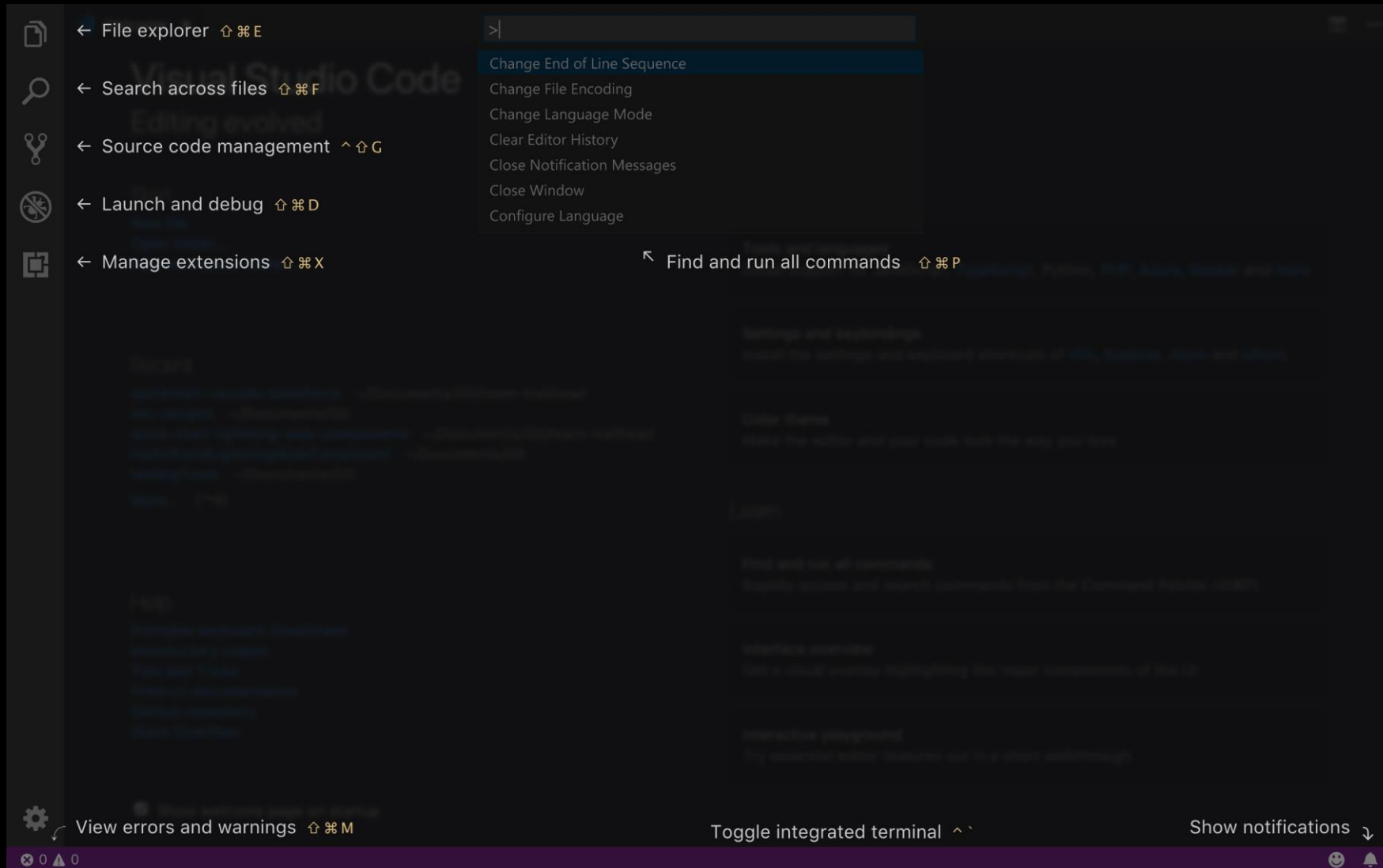
Download: <https://code.visualstudio.com/>



User Interface



Under Learn, click Interface Overview to view a visual overview of the different features of Visual Studio Code.



Make Visual Studio Code Salesforce Ready

Install the Command Line Interface (CLI)

Download the CLI using the appropriate link below.

| Operating System | Link to Installer |
|-------------------|---|
| macOS | https://sfdc.co/sfdx_cli_osx |
| Windows 32-bit | https://sfdc.co/sfdx_cli_win |
| Windows 64-bit | https://sfdc.co/sfdx_cli_win64 |
| Debian/Ubuntu 64 | https://sfdc.co/sfdx_cli_linux Download the archive from one of the URLs in the manifest, extract the archive, then run the ./install script. |
| Debian/Ubuntu x86 | https://sfdc.co/sfdx_cli_linux_x86 Download the archive from one of the URLs in the manifest, extract the archive, then run the ./install script. |

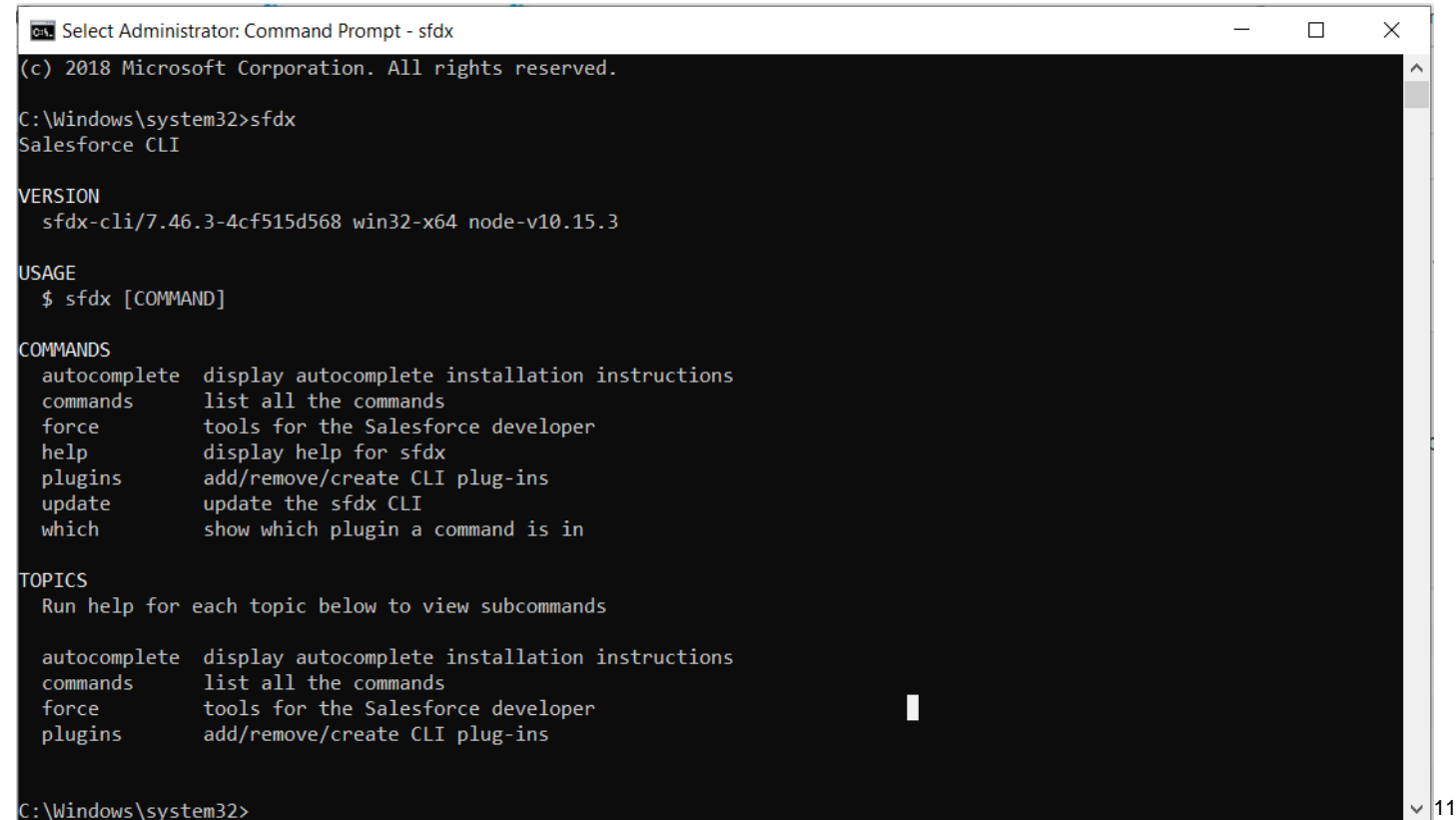
Make Visual Studio Code Salesforce Ready

Make sure the CLI is properly installed

Open the terminal app in macOS
or the Command Prompt in
Windows and enter **sfdx**.

Can try:
sfdx update

(to update the CLI)



```

Select Administrator: Command Prompt - sfdx
(c) 2018 Microsoft Corporation. All rights reserved.
C:\Windows\system32>sfdx
Salesforce CLI

VERSION
  sfdx-cli/7.46.3-4cf515d568 win32-x64 node-v10.15.3

USAGE
  $ sfdx [COMMAND]


COMMANDS
  autocomplete  display autocomplete installation instructions
  commands      list all the commands
  force         tools for the Salesforce developer
  help         display help for sfdx
  plugins       add/remove/create CLI plug-ins
  update        update the sfdx CLI
  which        show which plugin a command is in

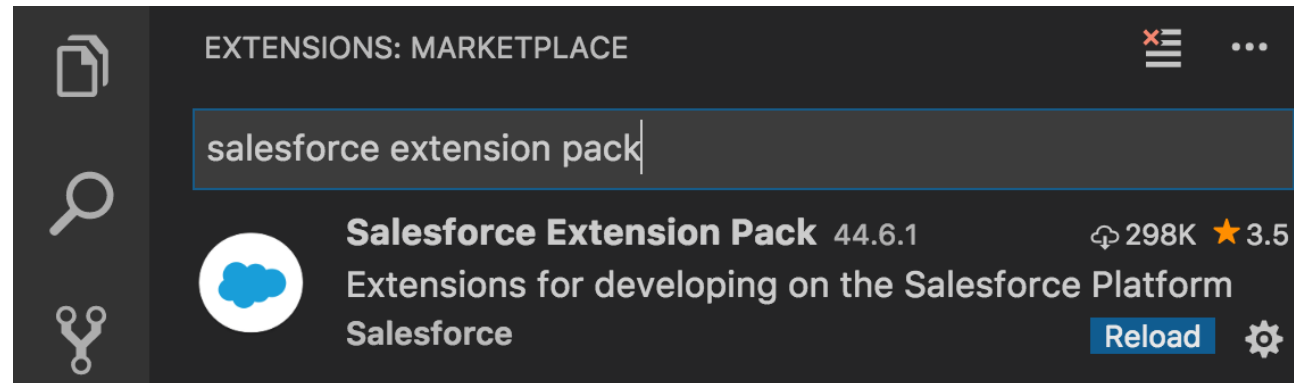
TOPICS
  Run help for each topic below to view subcommands

  autocomplete  display autocomplete installation instructions
  commands      list all the commands
  force         tools for the Salesforce developer
  plugins       add/remove/create CLI plug-ins
C:\Windows\system32>
```

Make Visual Studio Code Salesforce Ready

Install the Salesforce Extension Pack

1. Launch **Visual Studio Code**
2. On the left toolbar, **click** the Extensions icon 
3. Enter Salesforce Extension Pack in the search field.

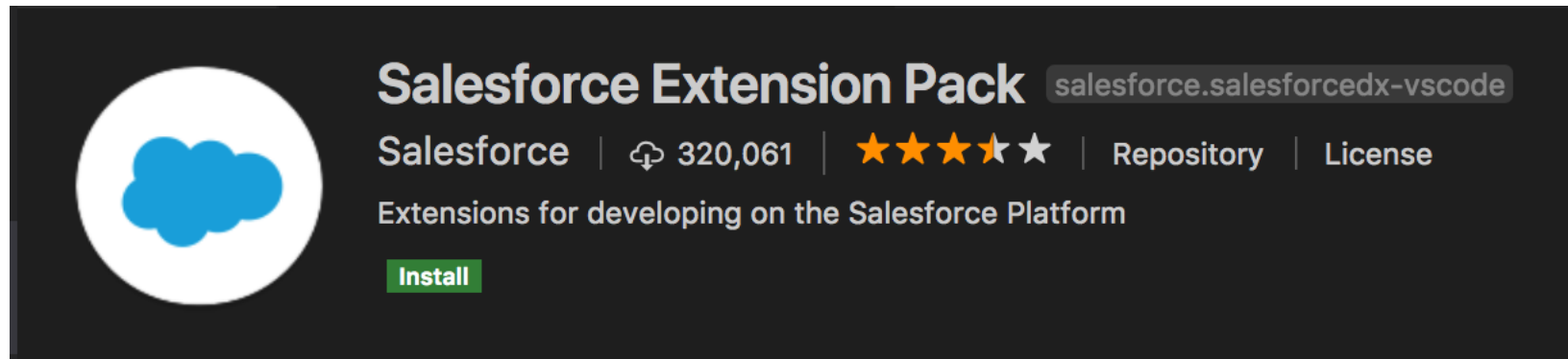


4. **Click** into the card that says Salesforce Extension Pack

Make Visual Studio Code Salesforce Ready

Install the Salesforce Extension Pack

5. Then in the newly launched window, click the green **Install** button

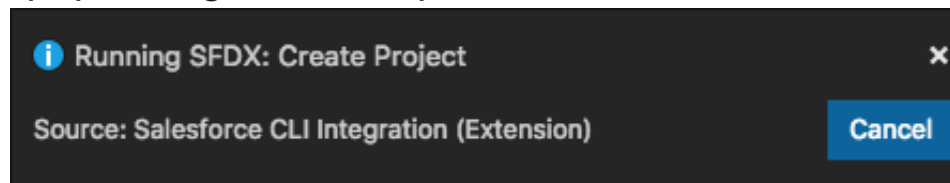


6. Close and relaunch Visual Studio Code to complete the installation.

Use Visual Studio Code for Salesforce Development

Create a Project

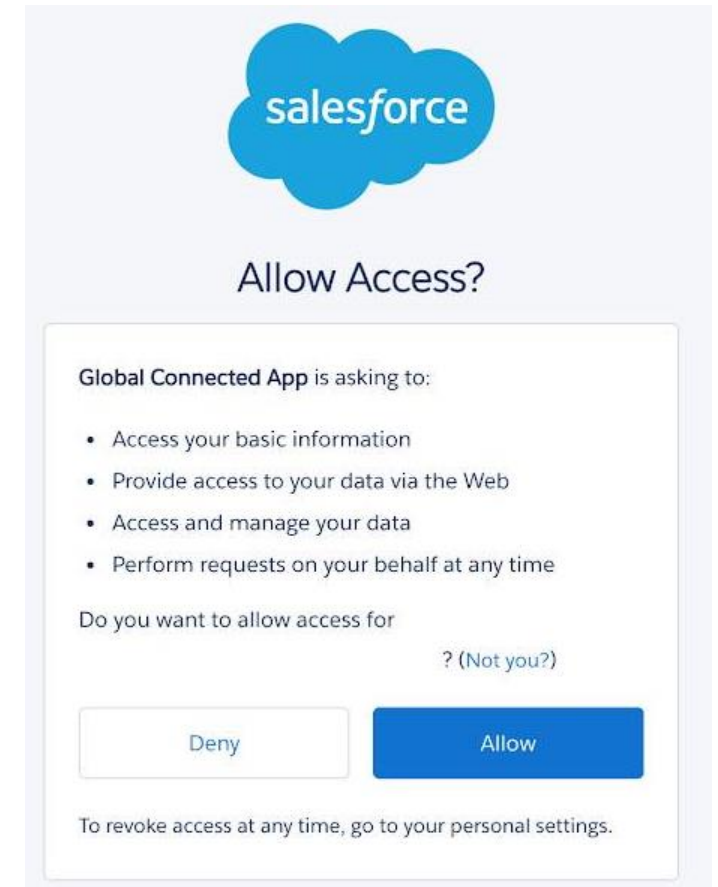
1. Press **Command + Shift + P** on Mac or **Ctrl + Shift + P** on Windows to make the command palette appear.
2. Make sure the new prompt starts with **>**
3. Type **SFDX: Create Project with Manifest**
4. Press Enter. Then, press Enter again to select the **Standard** template.
5. Type: *VSCodeQuickstart* .
6. Select your Desktop as the place to create the project in so it is easy to find later on.
7. Wait for the new Visual Studio Code window to open. You should see an indication that the extension is preparing your project before populating the file explorer.



Use Visual Studio Code for Salesforce Development

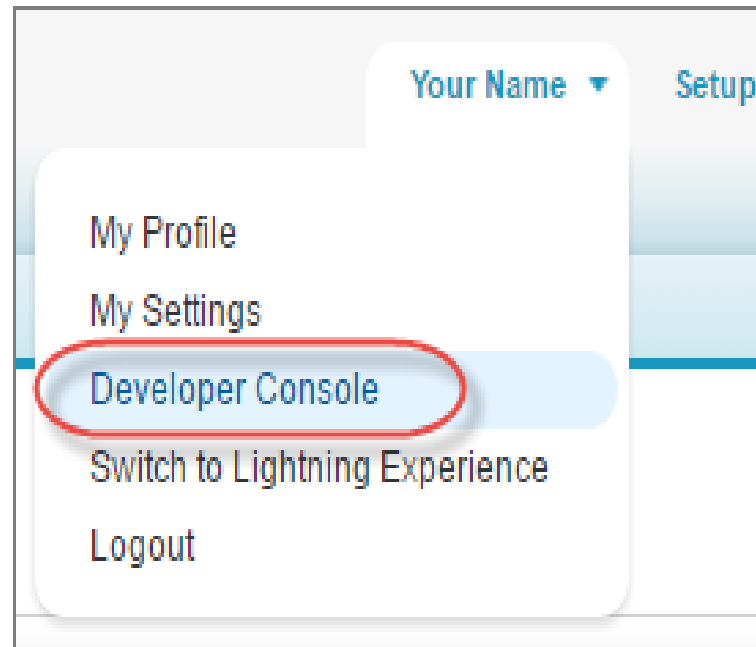
Authenticate into Dev Org

1. Press Command + Shift + P on Mac or Ctrl + Shift + P on Windows to make the command palette appear.
2. Type **SFDX: Authorize an Org**.
2. To accept the default login URL, press Enter.
3. Enter the alias *VSCodeIsobarClass*.
4. Notice that your default browser opens a new Salesforce login window. Log in to your dev org.
5. When you are asked to grant access to the connected app, click to allow.

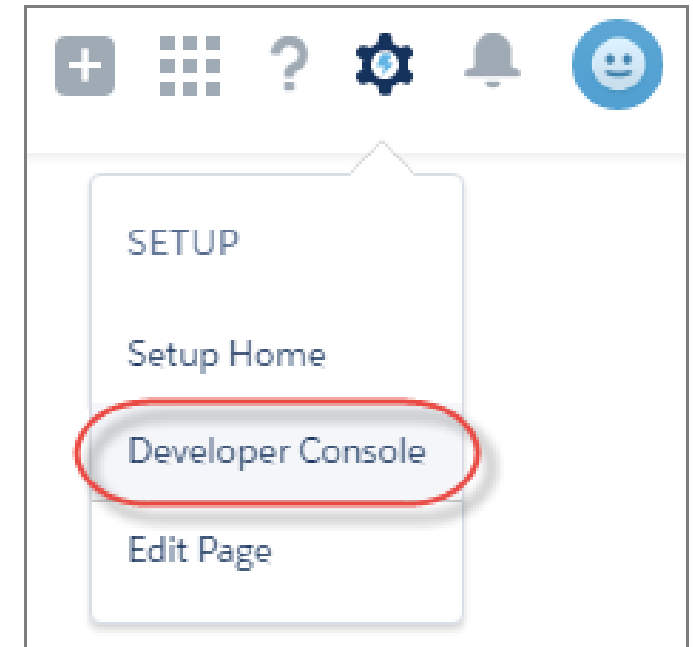


Developer Console

1. What Is the Developer Console?
2. When Do You Use the Developer Console?
3. Accessing the Developer Console

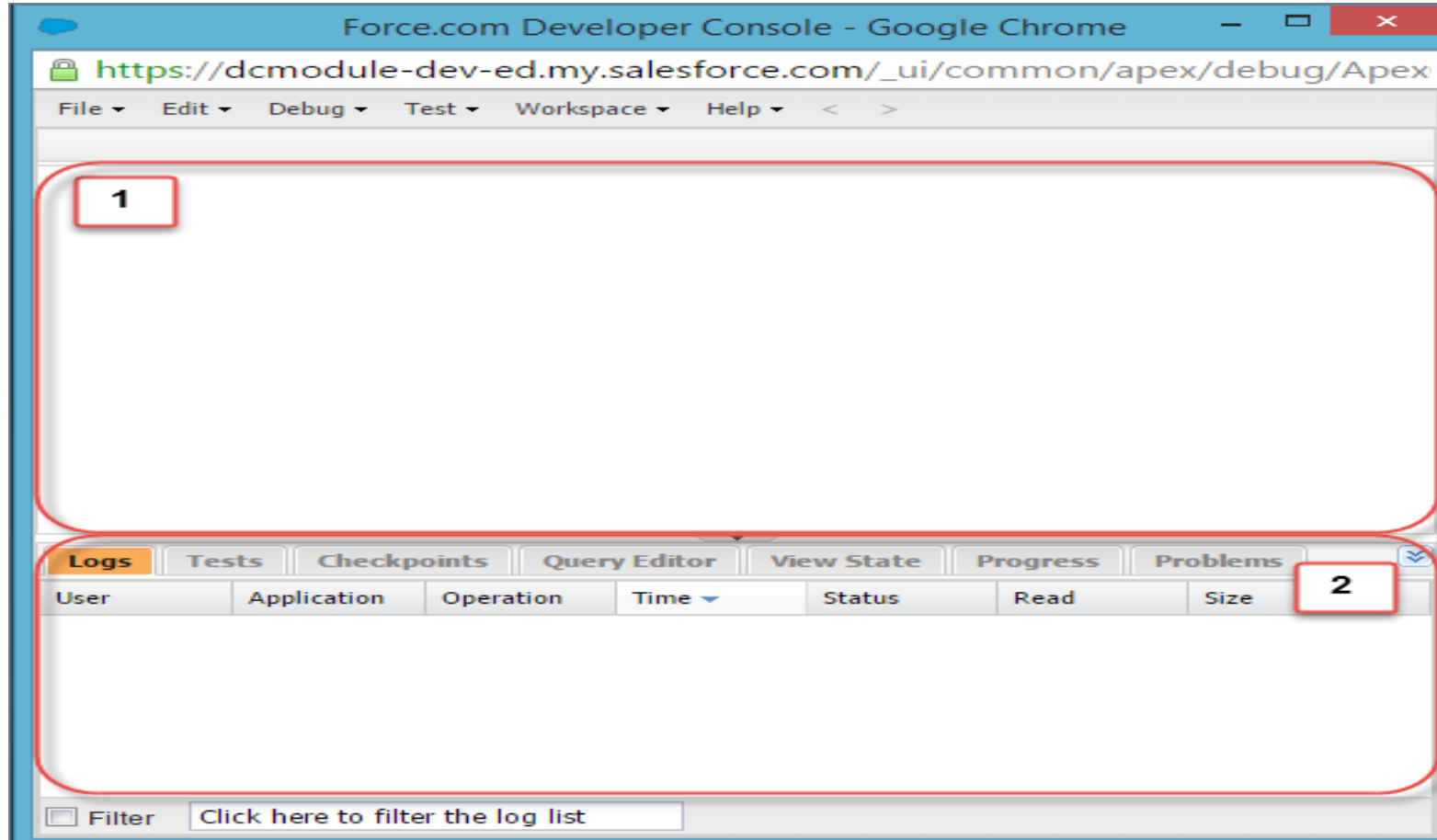


Salesforce Classic



Lightning Experience

Developer Console

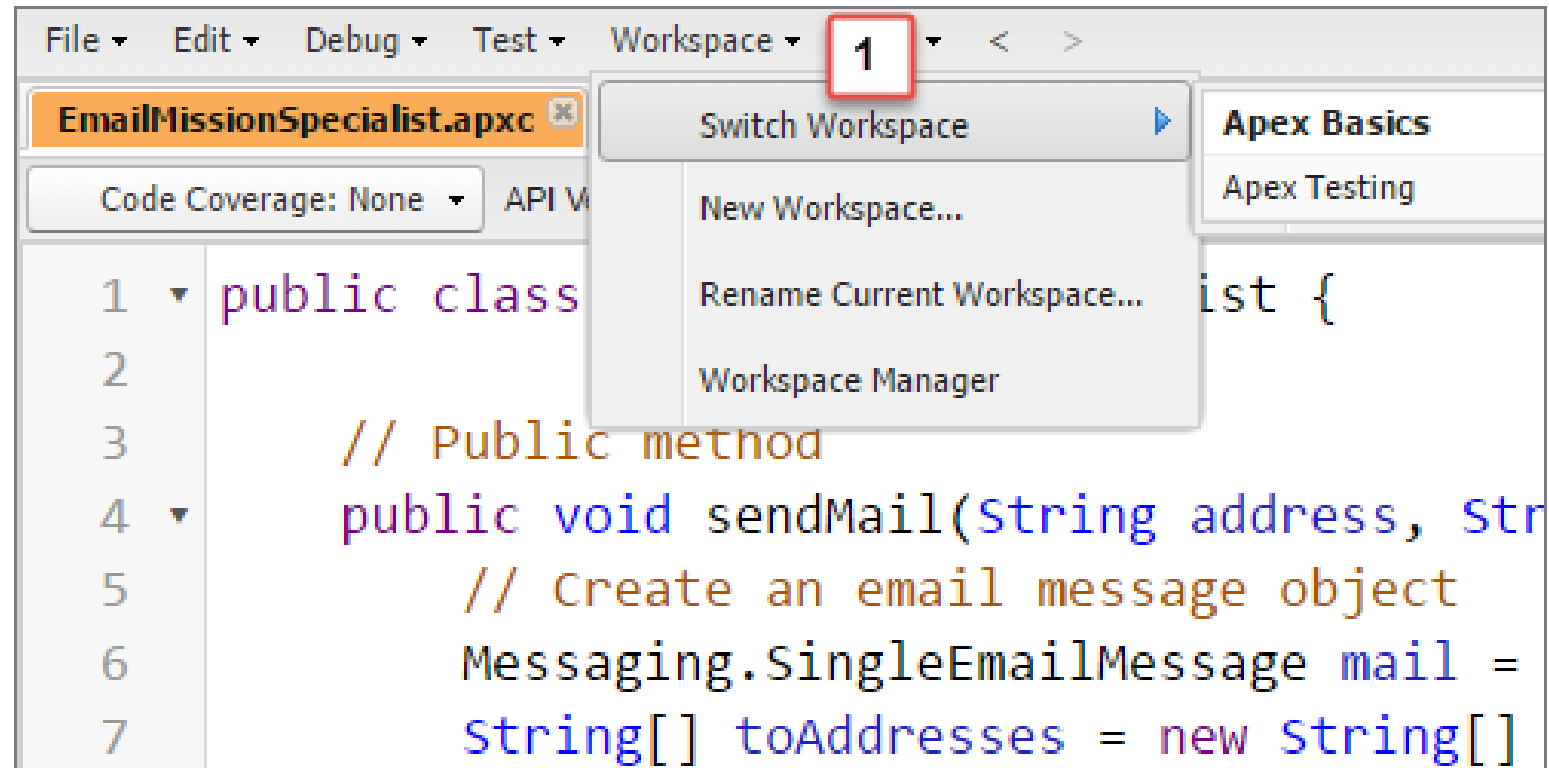


The main pane (1) is the source code editor, where you can write, view, and modify your code.

The tabs pane (2) is where you can view logs, errors, and other information, and write queries to interact with the records in your org.

Set Up Your Workspace

1. What is a workspace?
2. Create\ Switch workspace.



Question time!

If do you want to connect to multiple Orgs to edit classes, you will use ?

- Developer Console

Or

- Visual Studio Code with Salesforce extension

Question time!

If do you want to connect to multiple Orgs to edit classes, you will use ?

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Metadata and Objects



Objects

Objects are tables in the Salesforce database that store a particular kind of information.


There are **standard objects** like Accounts and Contacts and **custom objects** created by developers and admins.


- **Standard Objects** — These are objects included with Salesforce, by default, for example the objects used to store data in standard tabs such as accounts, contacts or opportunities.
- **Custom Objects** — These are new objects you create to store information unique to your application. Custom objects extend the functionality that standard objects provide.

Fields are columns in object database tables. Both standard and custom objects have fields.

Records are rows in object database tables. Records are the actual data associated with an object.

Example: Account



 Account

Adobe Systems Software 


[+ Follow](#) [Edit](#) [Delete](#) [Change Owner](#)

Country


Account Owner

 [Paul Hendriks](#) 

Account Record Type


Supplier 

Account Name

Adobe Systems Software 


Country

Account Number

0000000074 


Parent Account

Type


ICT Services 

Address Information


Shipping Address

Billing Address 

Created By

 [Paul Hendriks](#), 25.11.2018 18:03

Last Modified By

 [Paul Hendriks](#), 6.12.2019 19:09

 **Contacts (0)** [New](#) [Add to Campaign](#)

0 items • Sorted by Contact Name • Updated a few seconds ago

 **Activity History (0)** [View All](#)

0 items • Sorted by Due Date, Last Modified Date/Time • Updated a few seconds ago

 **Files (0)** [Add Files](#)

[Upload Files](#)

Or drop files


Object

Custom Object Creation

1. Click **Object Manager** tab next to the Home tab.
2. Click on **Create** dropdown at the right side and then select **Custom Object**.
3. On the Custom Object Definition page, create the object as follows:
 - Label: **Starship**
 - Plural Label: **Starships**
 - Record Name: **Starship Name**
 - Check the **Allow Reports** checkbox
 - Check the **Allow Search** checkbox
 - Click **Save**.
4. Now create a custom tab. Click the **Home** tab, enter **Tabs** in Quick Find and select **Tabs**.
5. Under **Custom Object Tabs**, click **New**.
6. For **Object**, select **Starship**.
7. For **Tab Style**, select any icon.
8. Leave all defaults as is. Click **Next**, **Next**, and **Save**.

Object

Custom field creation

1. From the gear icon (), click **Setup** to launch the setup page.
2. Click the **Object Manager** tab.
3. Click **Starship**.
4. Under *Fields & Relationships*, click **New**.
5. A data type indicates what kind of information your field holds. For this field, pick *Number* and click **Next**.
6. The Field Label is what you see on the Startship page. Enter *Quantity* and click **Next**.
7. Click **Next** and then **Save**.

Metadata

The structure of your org

Whether you're defining fields, business processes, or something more complex, metadata holds your configuration.

The platform then renders your app's metadata in the user interface along with its associated data.

You can see metadata in action on the record detail pages.

On this detail page for an account record, you can see field names like Type, Account Number, and Website. These are the metadata that define the structure of your app. The values of each of these fields are our actual data, and in terms of our data model, they aren't particularly relevant

| | | | |
|---------------------------------------|----------------|---------------------|------|
| ACCOUNT Grand Hotels & Resorts Ltd | | + Follow | Edit |
| Type | Phone | Website | |
| Customer - Direct | (312) 596-1000 | www.grandhotels.com | |
| RELATED | | DETAILS | NEWS |
| Account Name | | Phone | |
| Grand Hotels & Resorts Ltd | | (312) 596-1000 | |
| Parent Account | | Fax | |
| | | (312) 596-1500 | |
| Account Number | | Website | |
| CD439877 | | www.grandhotels.com | |
| Account Site | | Ticker Symbol | |
| | | GHTL | |
| Type | | Ownership | |
| Customer - Direct | | Public | |


Question time!

It's only possible to create new fields on:

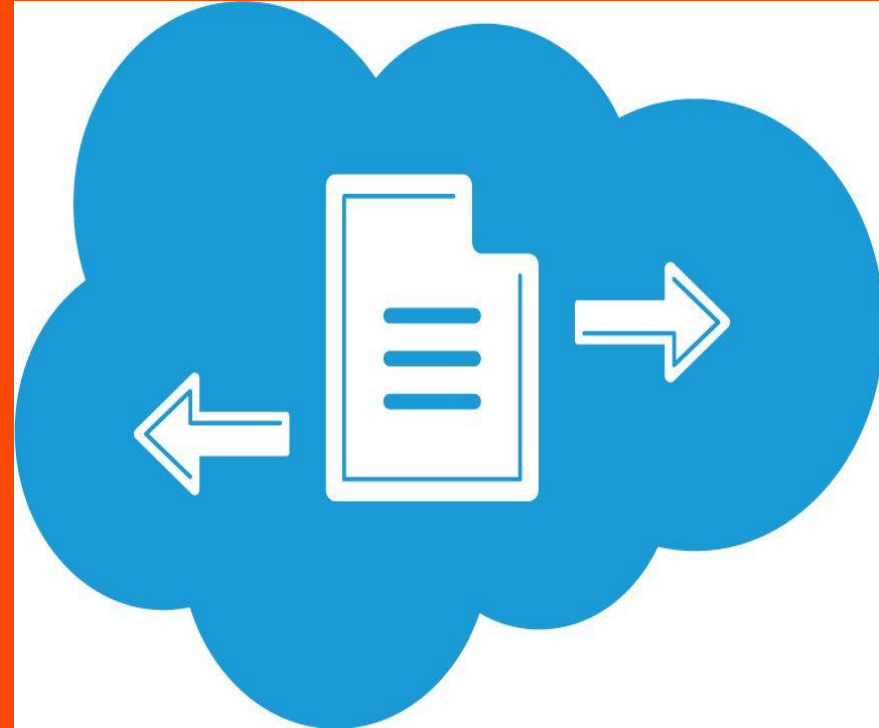
- Standard Objects
- Custom Objects
- In both (custom and standard objects)

Question time!

It's only possible to create new fields on:

- Standard Objects
- Custom Objects
- In both (custom and standard objects) 

Data management



Data management

Import Data

- **Data Import Wizard**
 - You need to load less than 50,000 records.
 - The objects you need to import are supported by the wizard.
 - You don't need the import process to be automated
- **Data Loader**
 - You need to load 50,000 to five million records.
 - You need to load into an object that is not supported by the Data Import Wizard.
 - You want to schedule regular data loads, such as nightly imports.

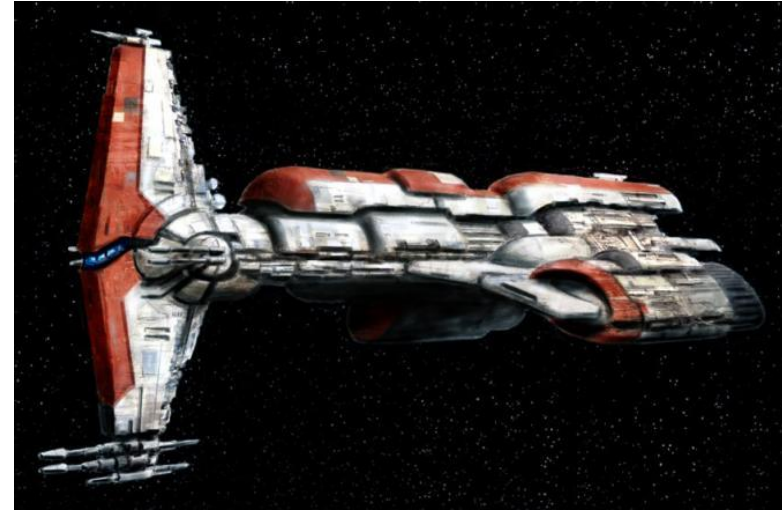
Data management

Use Data Import Wizard

- From Setup, enter Data Import Wizard in the Quick Find box, then select **Data Import Wizard**.
- Choose the data that you want to import
- To import accounts, contacts, leads, solutions, person accounts, or campaign members, click **Standard Objects**. To import custom objects, click **Custom Objects**.
- Specify whether you want to add new records to Salesforce, update existing records, or add and update records simultaneously.
- Specify the file that contains your data.
- Choose a character encoding method for your file. Most users can accept the default character encoding.
- Map your data fields to Salesforce data fields.
- Review and start your import.

Data management

Import Starships Data Sample



Data management

Export Data

- **Data Export Wizard**
 - Browser wizard, accessible through the Setup menu.
 - It allows you to export data manually once every 7 days (for weekly export) or 29 days (for monthly export).
 - You can also export data automatically at weekly or monthly intervals.
 - In Professional Edition and Developer Edition, you can generate backup files only every 29 days, or automatically at monthly intervals only.
- **Data Loader**

Data management

Export Data

1. From Setup, enter Data Export in the Quick Find box, then select **Data Export** and **Export Now** or **Schedule Export**.
 - The **Export Now** option prepares your files for export immediately. This option is only available if enough time has passed since your last export.
 - The **Schedule Export** option allows you to schedule the export process for weekly or monthly intervals.
2. Select the desired encoding for your export file.
3. If you want images, documents, attachments, and so on included in your data, select the appropriate options.
4. Select Replace carriage returns with spaces to have spaces instead of carriage returns or line breaks in your export files. This is useful if you plan to use your export files for importing or other integrations.
5. If you're scheduling your export, select the frequency (only available for organizations with monthly exports), start and end dates, and time of day for your scheduled export.
6. Under Exported Data, select the types of data to include in your export. We recommend that you select **Include all data** if you're not familiar with the terminology used for some of the types of data.

Question time!

I need to import 150.000 records, what Import tool I need to use?

- Data Import Wizard

or

- Data Loader

Question time!

I need to import 150.000 records, what Import tool I need to use?

- Data Import Wizard 

or

- Data Loader 



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