Salesforce Developer Workshop

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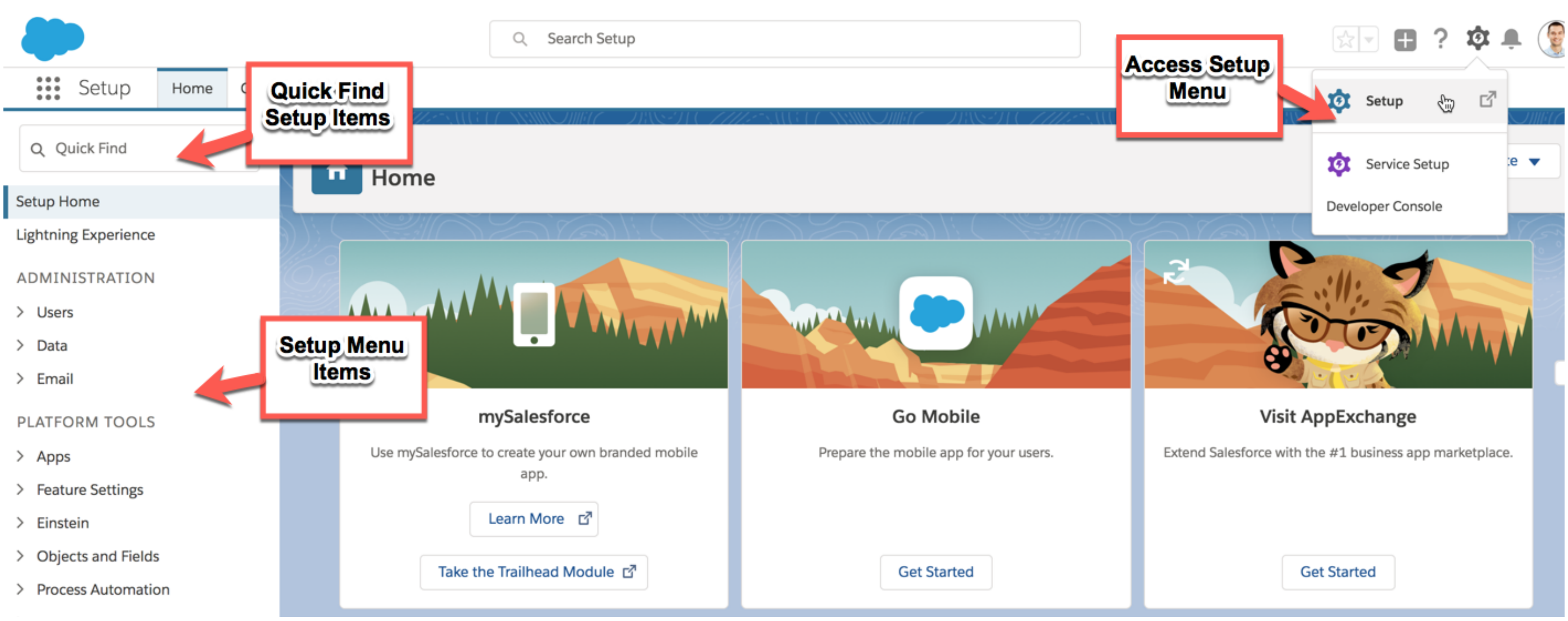
Introduction

This document contains the hands-on exercises corresponding to the topics being covered in the Developer Workshop presentation. As you go through the labs in this workbook, you will go through the typical process of building a Salesforce application with clicks, not code.

The primary activities in this workshop is configuring Salesforce to create the **Loot App**. This will include creating an app for administering the **Loot Campaign** as well as an app for employees to select Loot.

Configuring Salesforce for creating new applications, objects, fields, business rules, approval processes, etc… are all done through the Setup configuration menu. You access the Setup menu using the gear icon in top-right of the screen and then selecting Setup Home. Below is sample screen of the Setup options with a brief description.



Lab 0 – Developer Workshop Prework

We know you are excited to start the hands-on exercises. Just to make sure you are all set to get started, we had shared a list of prework with you.

If you were able to complete the prework, thank you! You might be slightly oriented to Salesforce and have a slight head start.

In case you weren't able to complete the prework, please complete the following items. The first two items are mandatory for completing the workshop today.

- Sign up for a free Salesforce Developer Edition Org – **MANDATORY**
- Setup My Domain for your Salesforce Org **- MANDATORY**
- Sign up for a free Trailhead account by following the instructions at Trailhead Basics. As you follow the instructions, please use your recently created Salesforce Developer Edition org credentials to sign up. **– OPTIONAL**
- Complete the Data Modeling Trail on Trailhead. - **OPTIONAL**

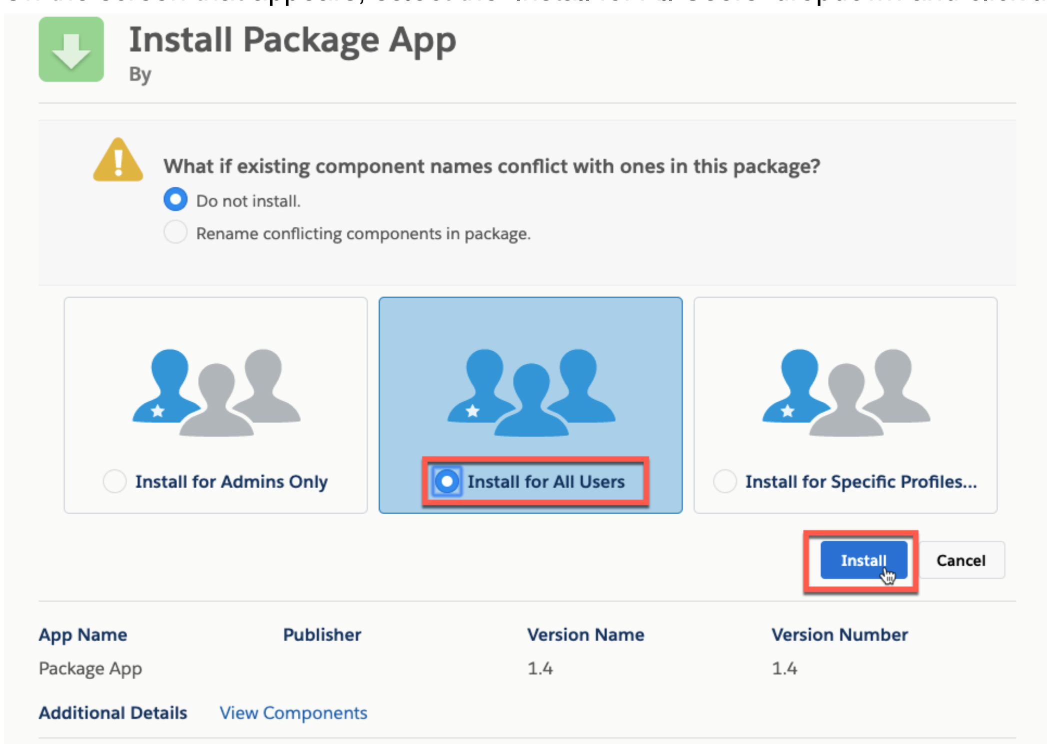
Lab 1 – Manage the data model for your app

In this lab, we will look at how we can create and extend the data model of your app. If you completed the pre-work for the workshop, this will be an extension of the pre-work. In case you haven't done the pre-work, don't worry, we got your back. This exercise will walk you through building a new custom object from scratch, add different field types to it and create relationships with other objects supplied by Salesforce.

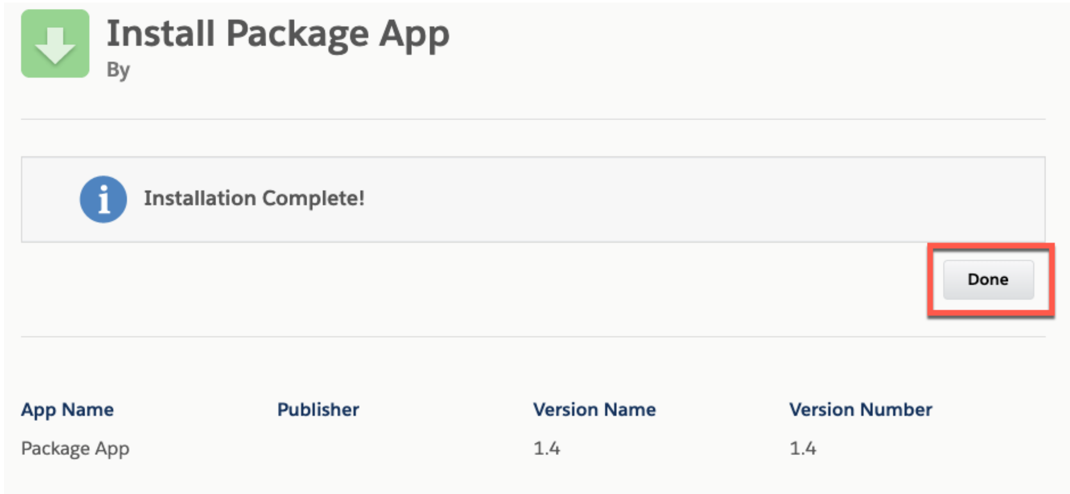
The **Loot Administration** and the **Loot** app are composed of multiple Salesforce objects. In the interest of time we have created some of those objects already. Before we get started with creating new objects and extend existing objects, let's install a package containing the objects we created into your Developer Edition environment.

If you are not logged in to your Salesforce Developer Edition environment:

a. Launch your browser and go to https://login.salesforce.com
b. Enter your user name and password and click `Log In`
c. Once logged in access, https://sfdc.co/blizzard_package in the same window. Login again if the browser prompts you to.
d. On the screen that appears, select the 'Install for All Users' dropdown and click Install



e. Once the package installs, you will see a confirmation message. Click ‘Done’.



f. You are now in the ‘Setup’ area of your Salesforce org tab.

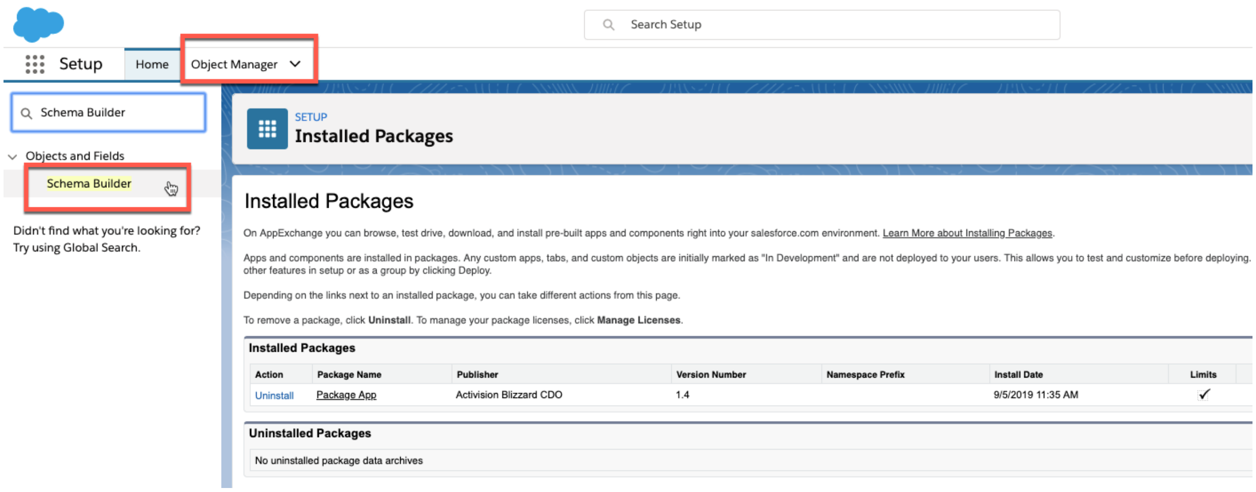
The package has installed a few Objects and related configuration in your org. Let’s take a look at the visual representation of these objects.

As you might have seen while completing the pre-work, Salesforce includes a rich data modeling tool that allows you to define custom objects, custom fields, and relationships between objects. For example, you can relate objects in parent-child relationships such as Requests and Tasks.

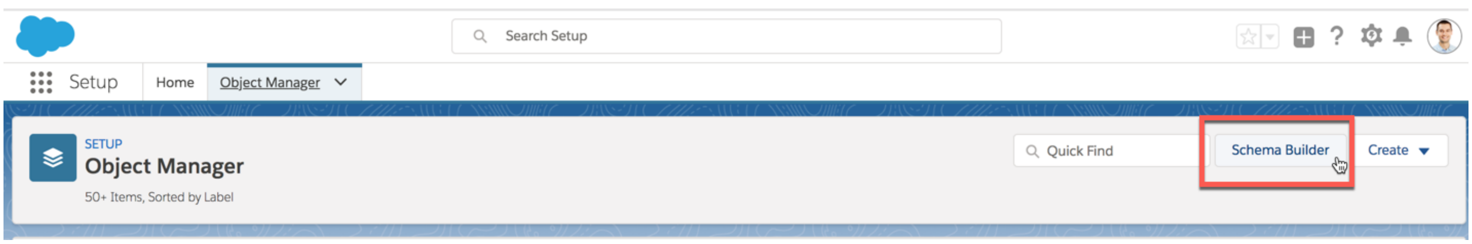
Schema Builder is great for visualization, but you can also use it to customize your data model. For example, you can manage the permissions for your custom fields directly in Schema Builder. Just right-click the field name and click Manage Field Permissions.

You can also create objects using **Schema Builder**. If you prefer, you can create objects in this visual interface if you’re designing your system and want to be able to revise all your customizations on the spot. Let’s see how it’s done.

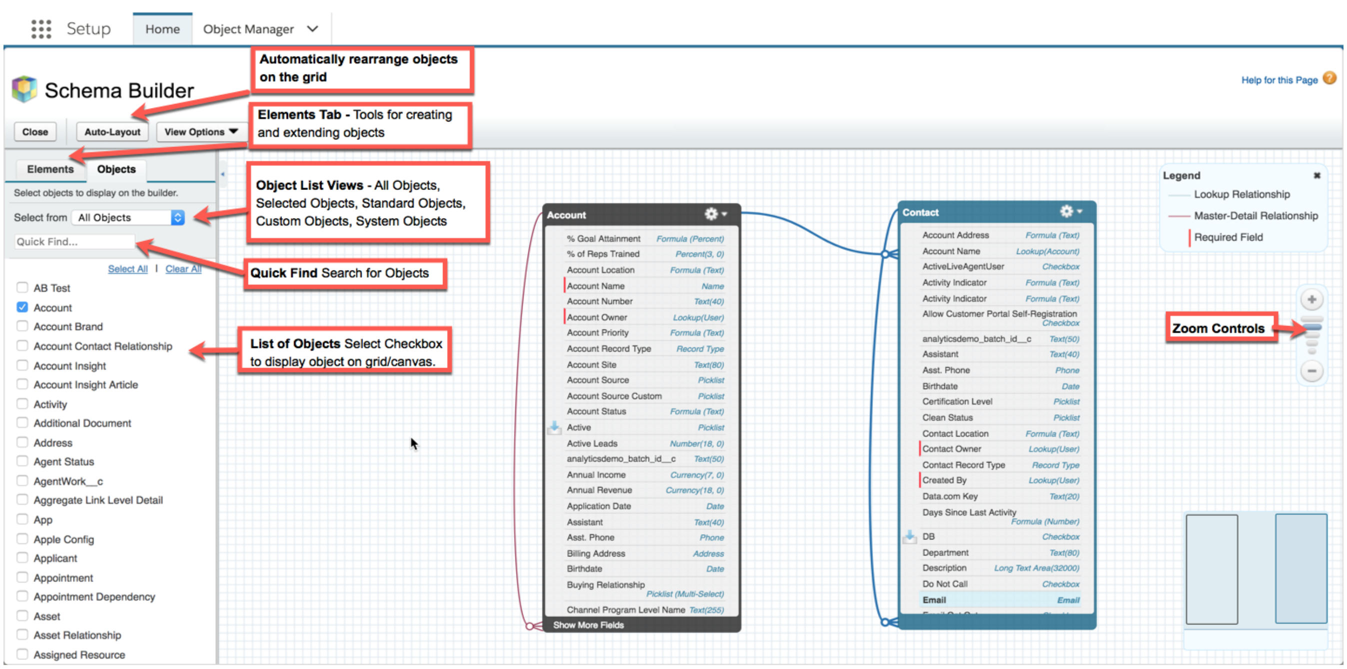
1. The Schema Builder can be accessed in a couple of ways.
   - **Option 1 -** Type '**Schema Builder**' in the '**Quick Find**' search box in **Setup**.



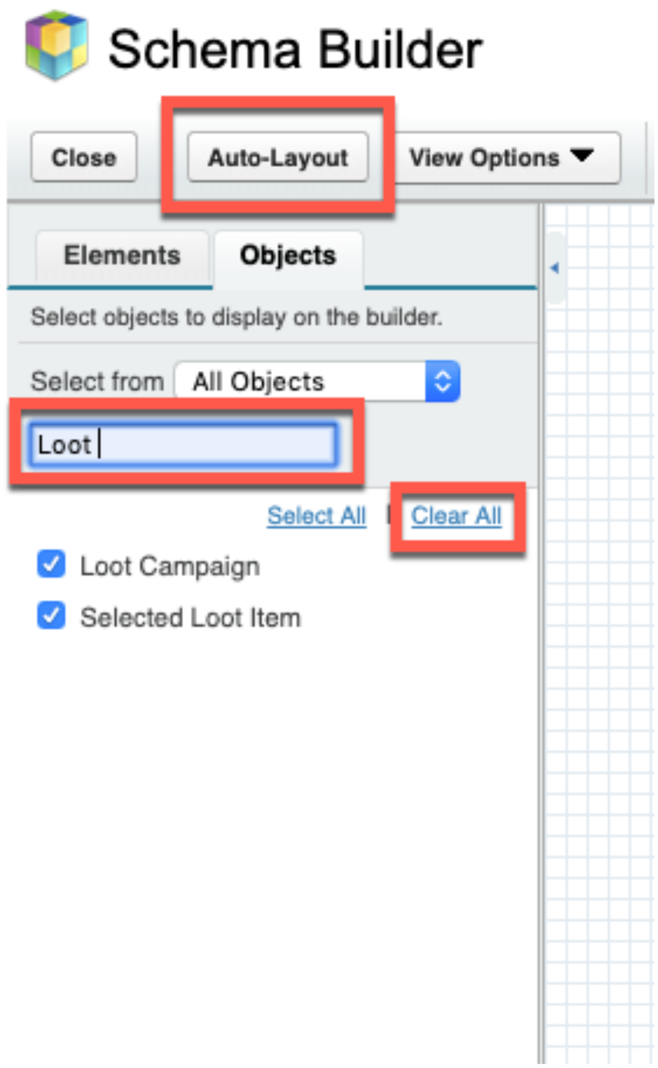
   - **Option 2 -** Click the **Object Manager** tab in the Setup screen and click on the **Schema Builder** button.



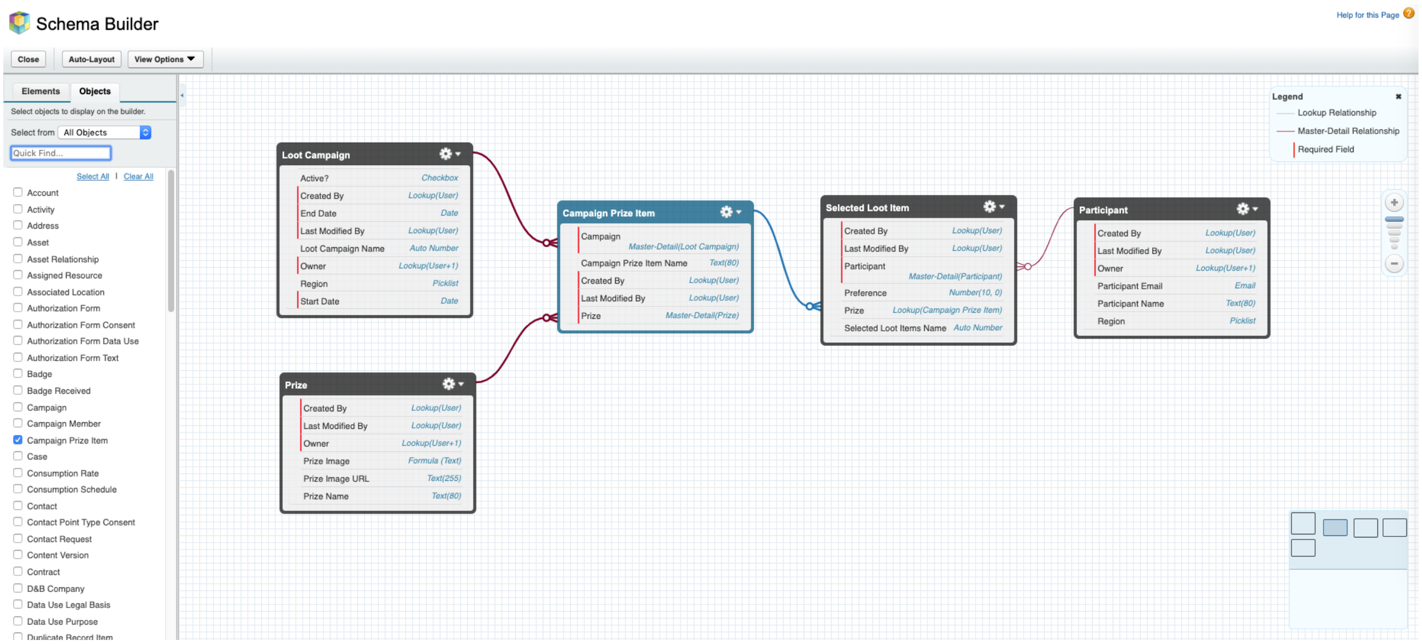
2. You should see something like the screen below once you access **Schema Builder**



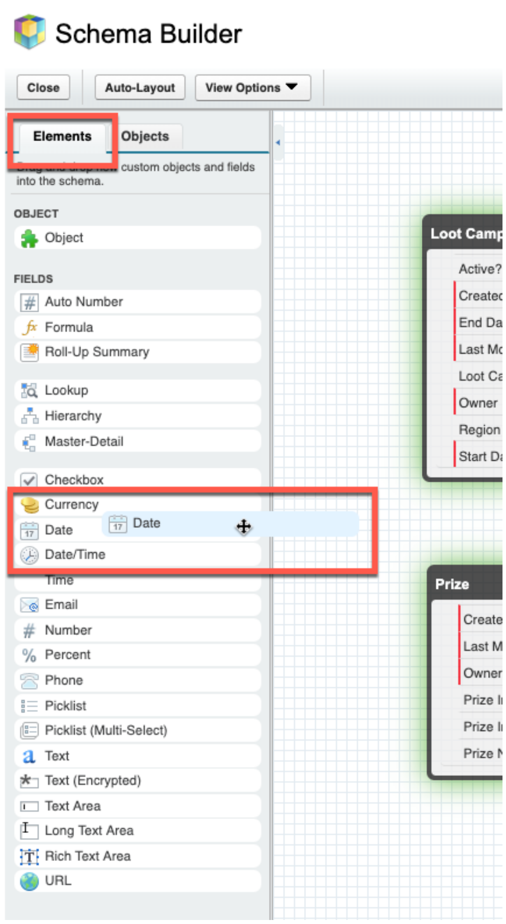
3. Click **Clear All** and type **Request** in the **Quick Find** box to clear the Canvas. Find the following objects by typing their names one by one in the **Quick Find** box and selecting the check box next to the name.
    - Loot Campaign
    - Selected Loot Item
    - Prize
    - Campaign Prize Item
    - Participant



4. If you don't see the items on the Canvas, click the **Auto-Layout** button to get the elements into view. Arrange the elements per your preference. You should see a screen similar to the following image.



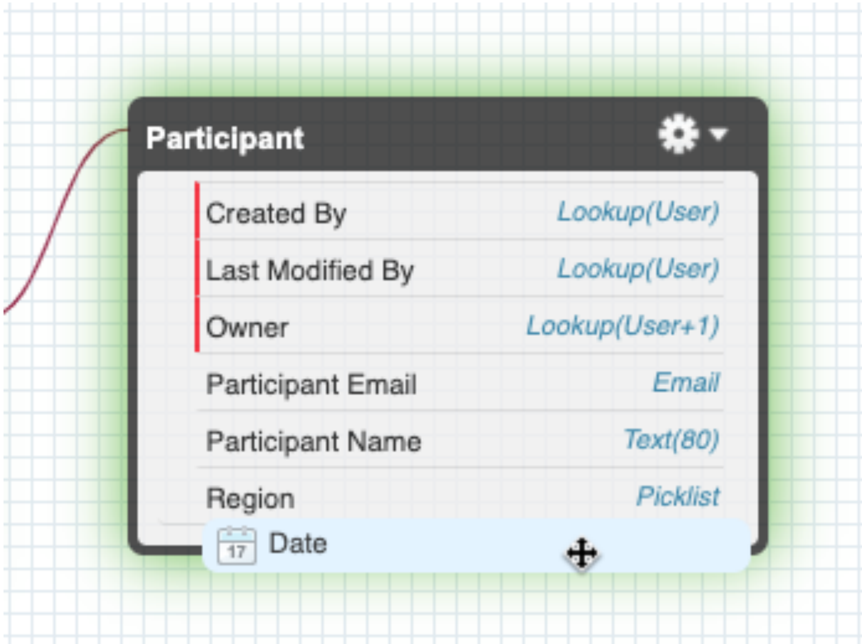
5. Click the Elements tab of the Schema Builder to see the drag and drop elements that can be used to manage and extend your data model.



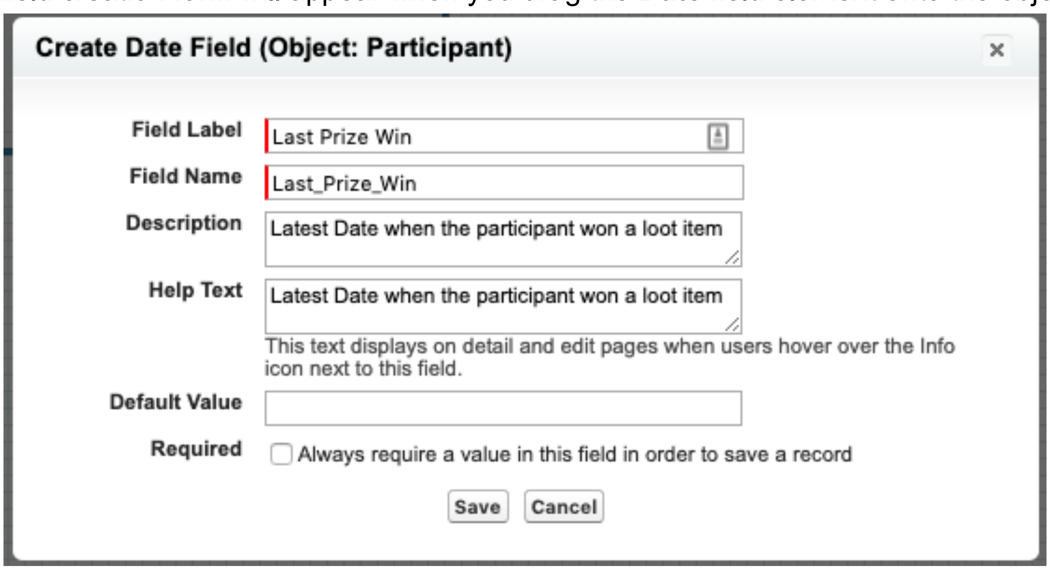
Create the Last Prize Win Field for the Participant Object

Let's create a new field on the Participant Object using the Schema Builder.

1. Drag a **Date** Element on to the Participant object.



2. A field creation form will appear when you drag the **Date** field element onto the object

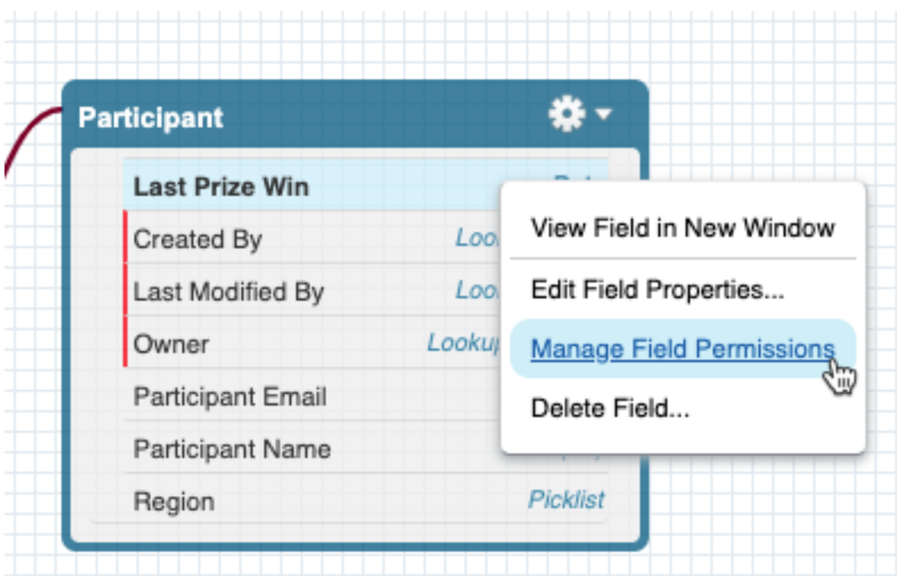


3. Enter the following details for the field

Parameter	Value
Field Label	Last Prize Win
Field Name	Last_Prize_Win (Will auto populate when you tab out of the Field label)
Description	Latest Date when the participant won a loot item
Help Text	Latest Date when the participant won a loot item
Default Value	*Leave Blank*
Requried	*Leave this unselected/unchecked*

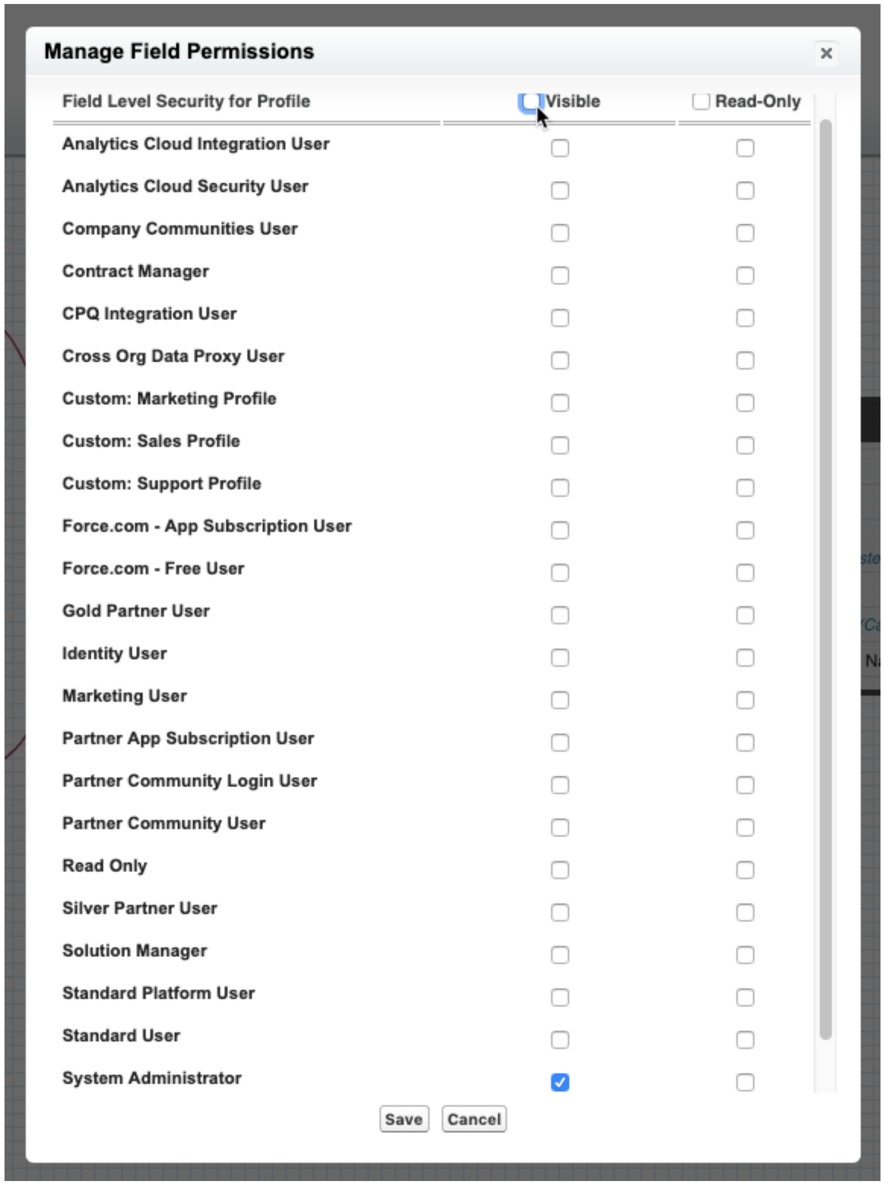
4. Click **Save.**

5. Set the permissions for the Last Prize Win Field
   a. To edit properties of a custom field, right-click the element name or label and select **Edit Field Properties**.



   b. To manage permissions of a custom field, click the element name or label and select **Manage Field Permissions**. Use the dialog box that appears to manage the field's visibility and writability for all standard and custom profiles. By default, the field-level security for custom fields is set to visible and editable for internal profiles—those not cloned from Partner User or Customer Portal Manager. Fields that are not normally editable, such as formulas and roll-up summary fields, are visible and read only.

c. Check and Uncheck the **Visible** button to clear the selection. Select the **System Administrator** profile and click **Save.**



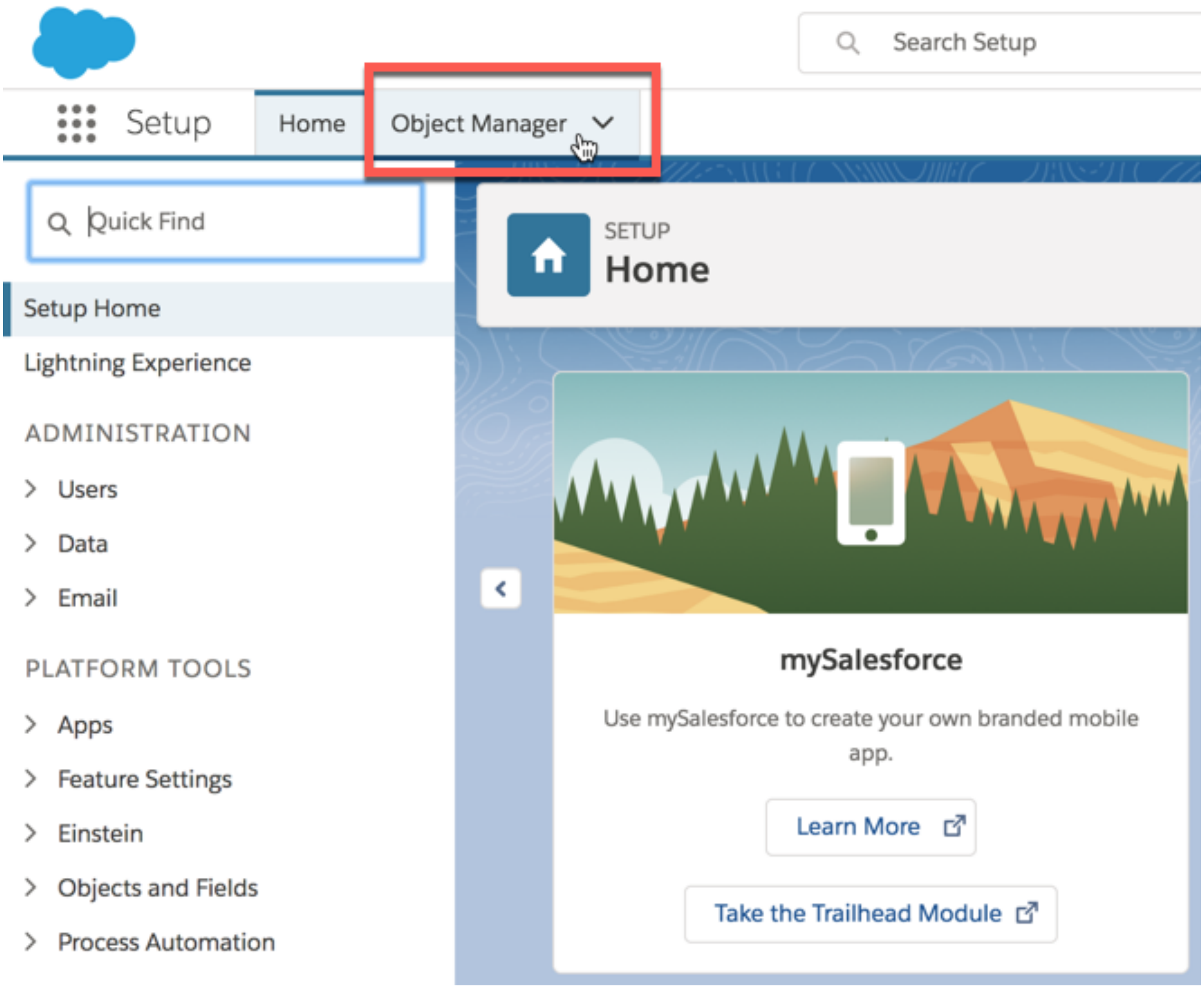
Awesome! You just took a tour of the Schema Builder, visualized the data model for your app, extended it and even managed security permissions for individual elements of the data model.

Create the Loot Winner Object

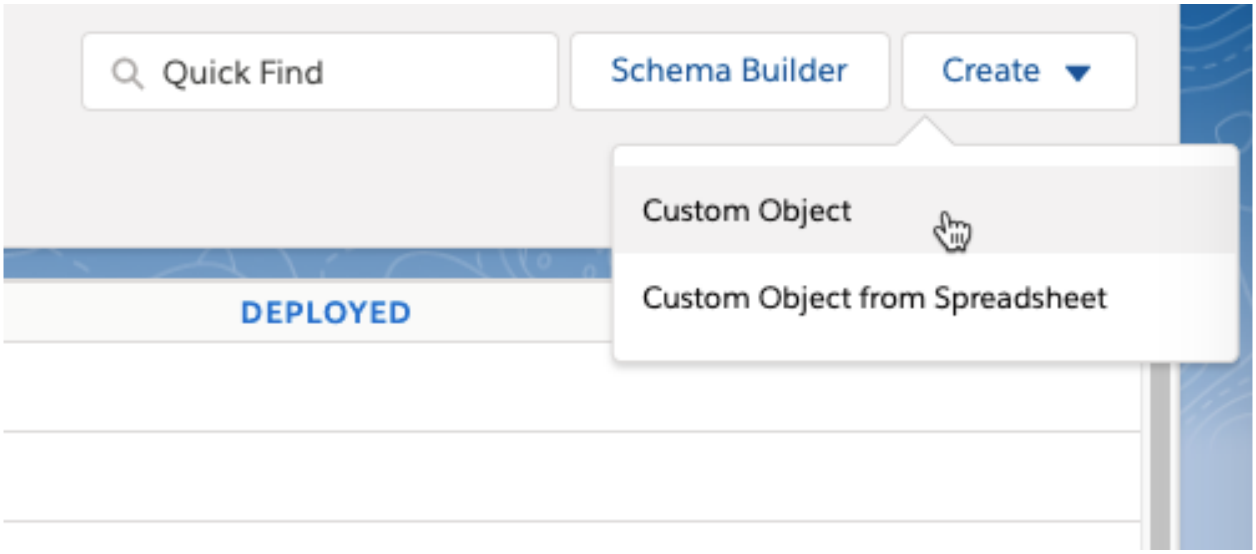
Schema Builder is a great way to quickly create and manage your data model. However, you need to make sure you manage the security settings and explicitly add data elements to the UI after you have created them.

All of these steps are taken care of if you use the Create Object wizard. Let’s see what that looks like by creating the ‘Loot Winner’ object. This object will keep a track of winners of past, present and future Loot winners.

1. If you are not already in **Setup,** Click the gear icon at the top of the page and click on **Setup.**
2. Click the **Object Manager**



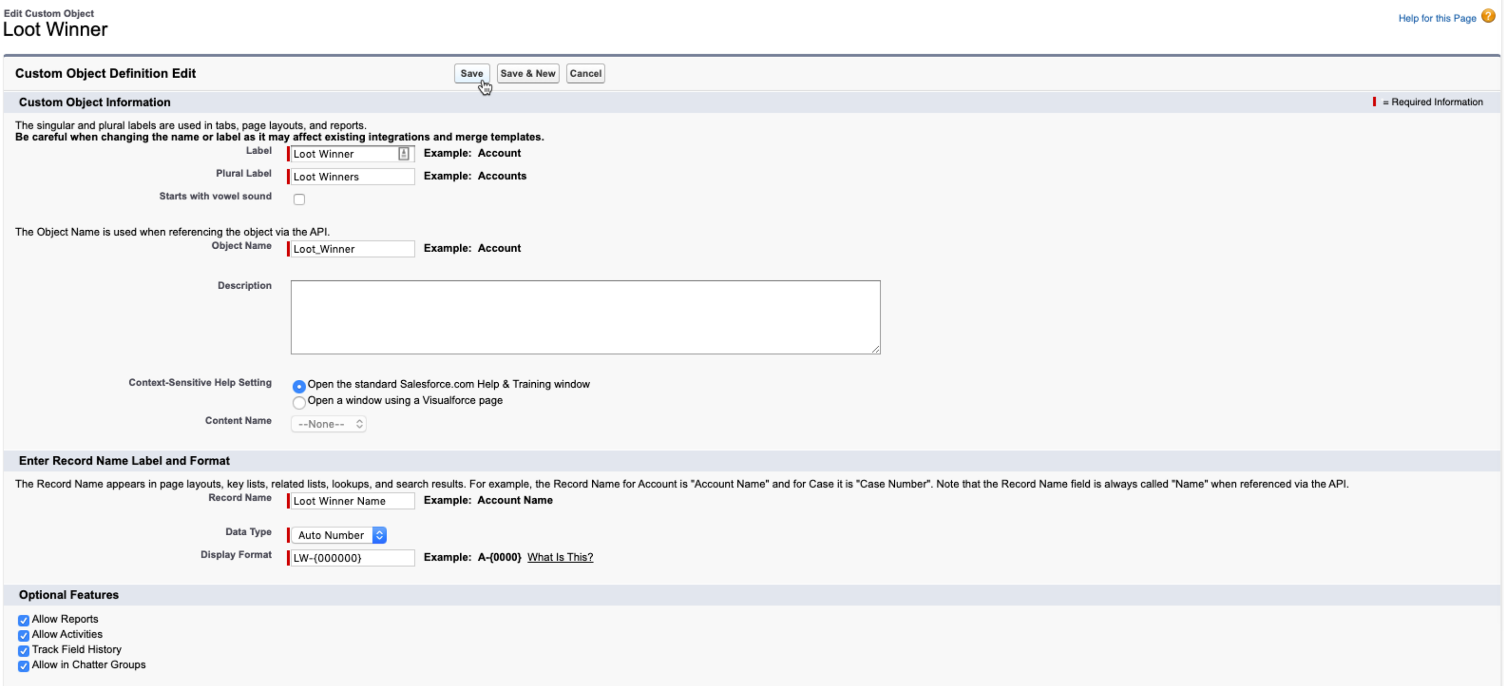
3. Click **Create** | **Custom Object** in the top right corner



4. Enter the following values on the screen that appears. If an option is not mentioned here, please leave it unchanged.

Parameter	Value
Label	Loot Winner
Plural Label	Loot Winners
Object name	Loot_Winner (Will auto populate when you tab out of the label name)
Description	Record of Loot Winners for Loot Campaigns
Data Type	Auto Number
Display Format	LW-{000000}
Allow Reports	Check
Allow Activities	Check
Track Field History	Check
Allow in Chatter Groups	Check
Allow Search	Check

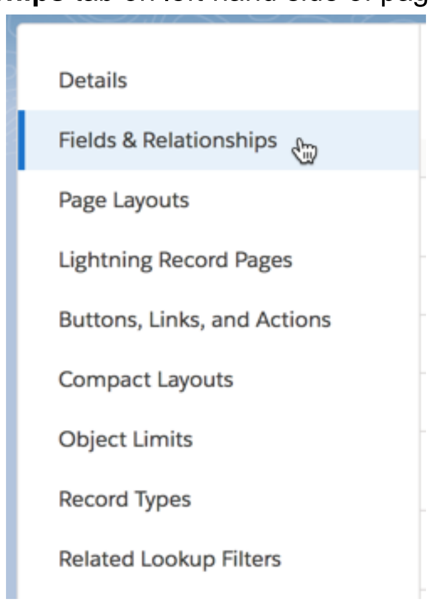
5. Your screen should look like the following screenshot. Click Save.



You are now directed to the object configuration page for the Loot Winner object. We will now create additional fields for the Loot Winner. First, we need to make sure we are in the Fields & Relationships section of the object editor.

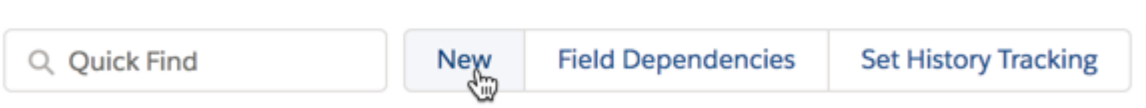
Create the Participant Field for the Loot Winner Object

1. Click on the **Fields & Relationships** tab on left-hand side of page.

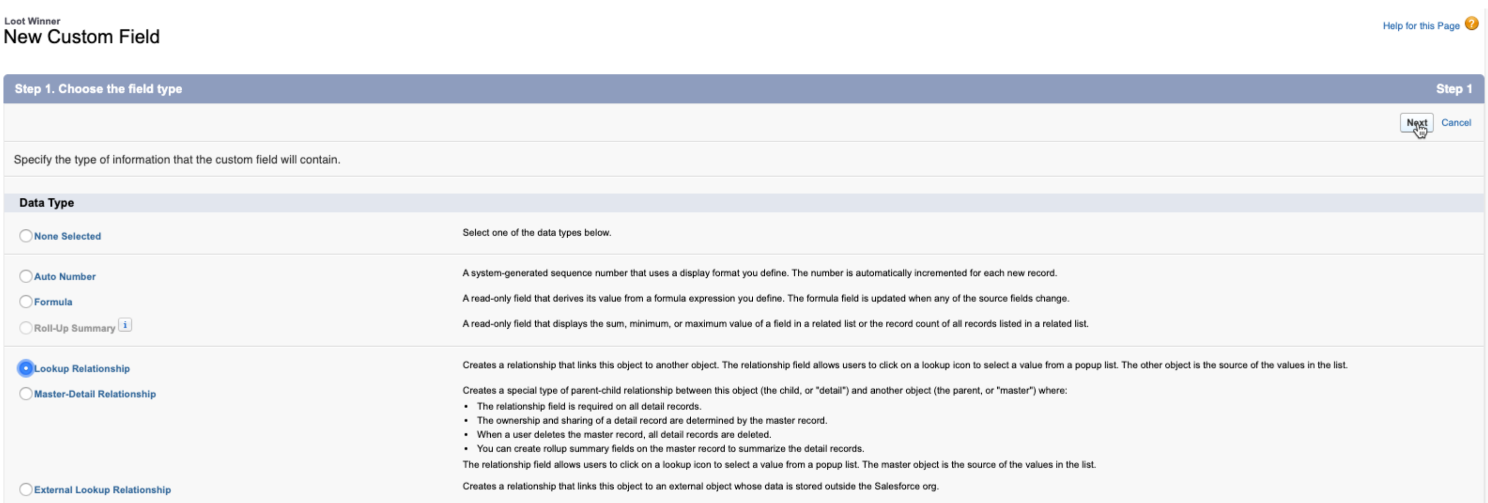


2. Let’s create the **Participant** field. This field will be related to the Participant Object that was installed as part of the package we installed earlier.

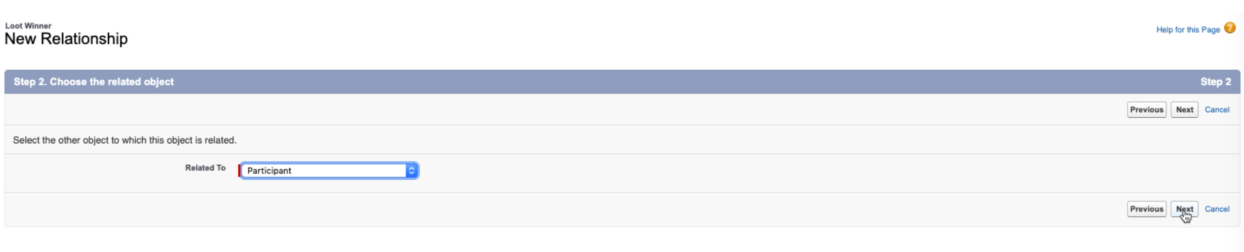
3. Click the **New** button towards the right of the screen to start the wizard to create a new field.



4. On step 1 of the **New Custom Field** screen, you need to select the field data type. Select the **Lookup** option and click the **Next** button.



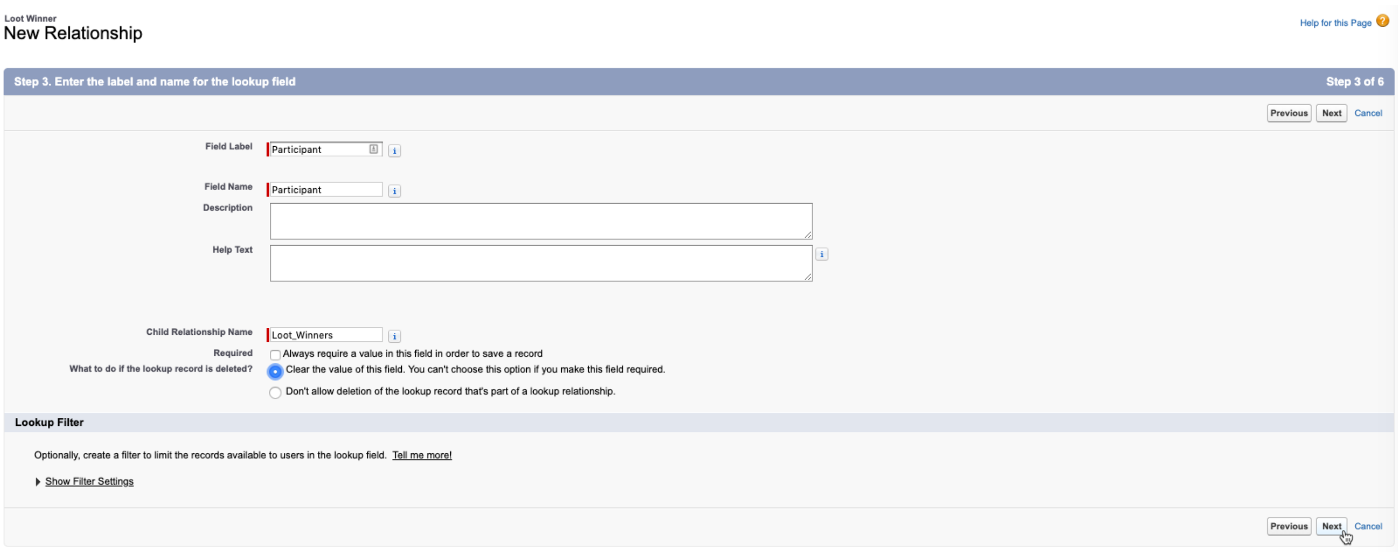
5. On the next screen, select **Participant** for the **Related To** dropdown. Click Next.



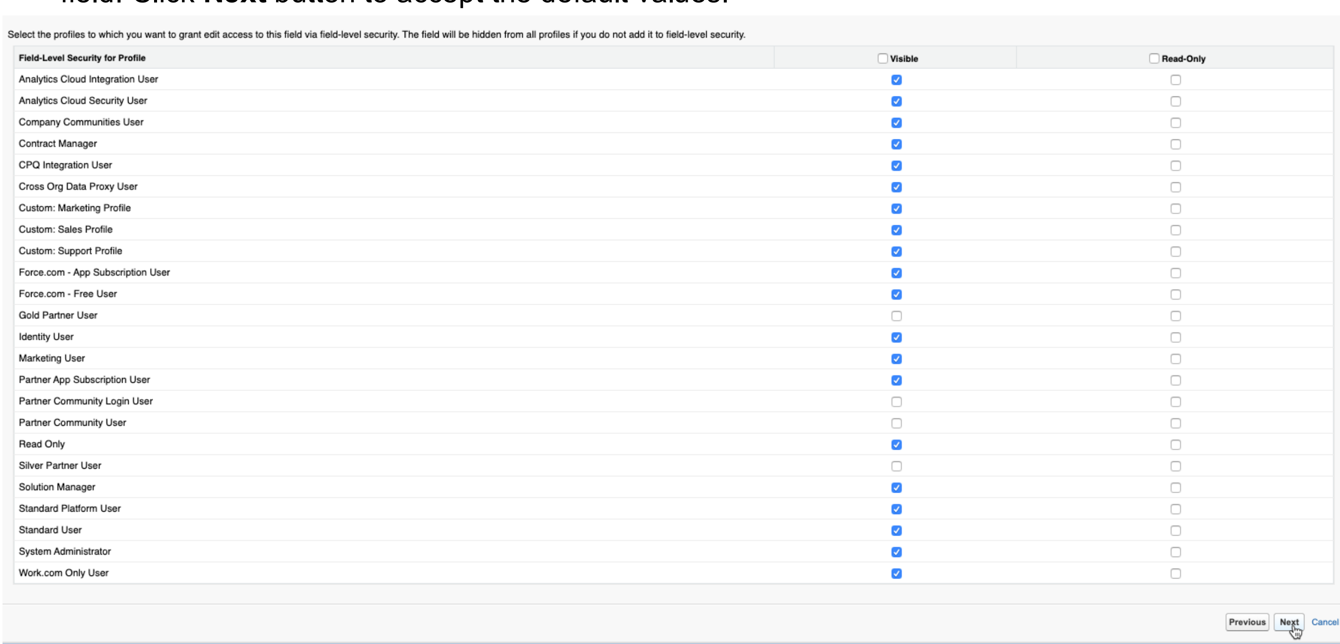
6. Enter the following values for the field details. Notice some options for a Lookup field. The **What to do if the lookup record is deleted?** option controls what happens if the related Participant record is deleted. You also have the option of setting up a **Lookup Filter** for this field limit the Participant records that can be related to a Loot Winner to only those that meet certain criterion.

Parameter	Value
Field Label	Participant
Field Name	Participant (populates automatically based on the Field Label and can be different from the label if required)

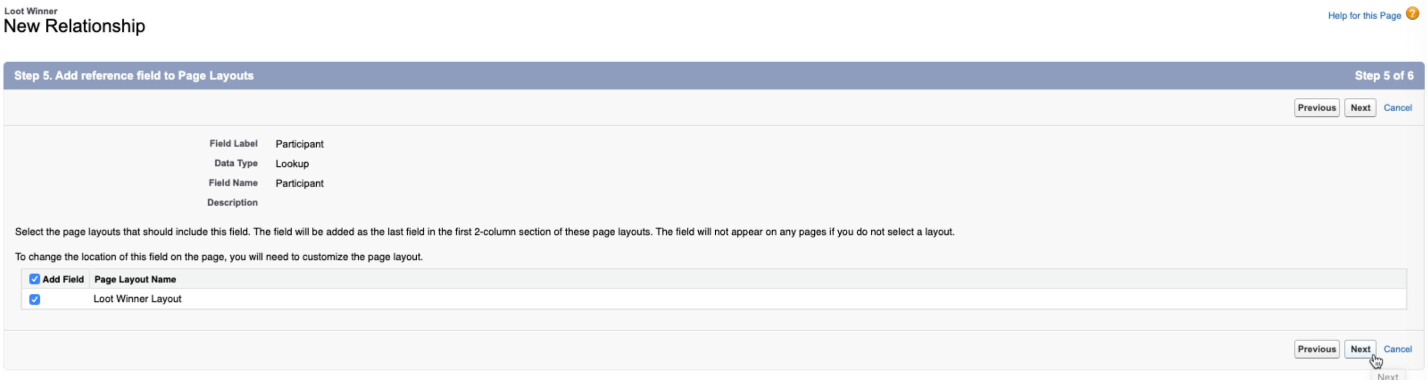
Click Next.



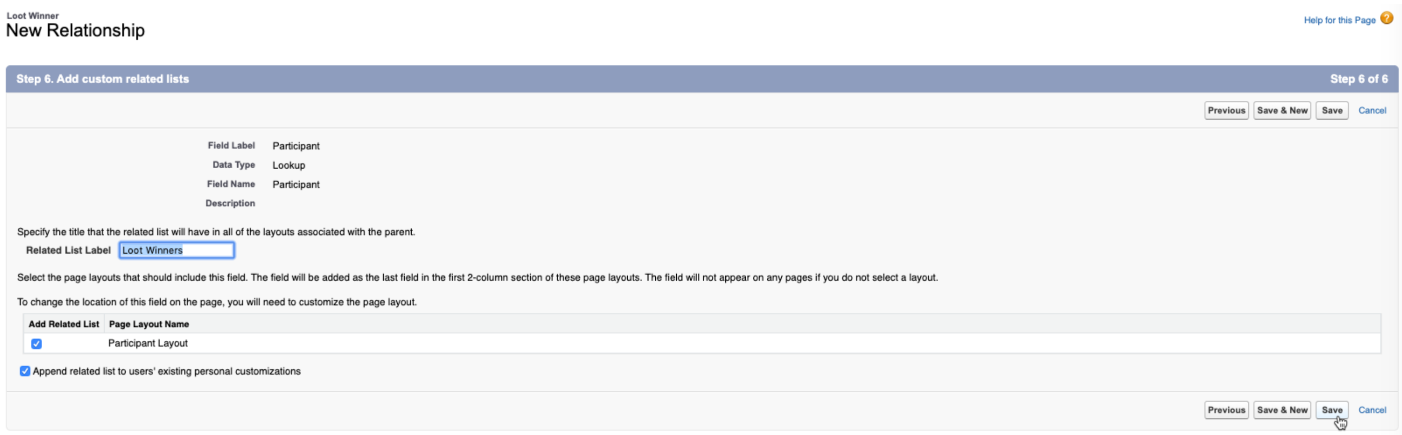
7. The next screen sets field level security for this new field you are creating. In Salesforce, you have ability to indicate which user profiles have view, edit or no access rights for the custom field. Click **Next** button to accept the default values.



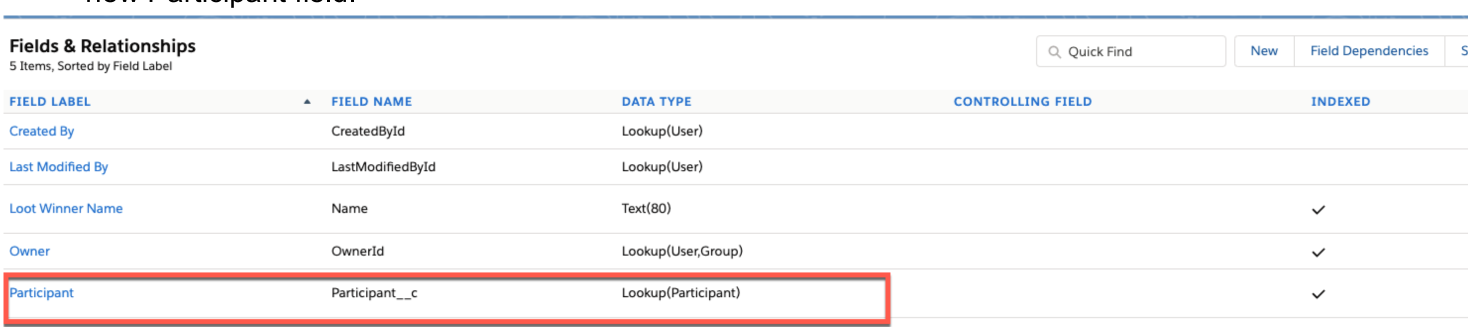
8. The next screen adds the field to a page layout. Accept the default and click the **Next** button.



9. The following screen provides the option to add the 'Loot Winners' Related List to the UI for the Participant object. Leave the Default options as they are and click **Save**.



10. You are redirected to the Fields and Relationships screen for the Loot Winner Object. Notice the new Participant field.



Create the Prize Field for the Loot Winner Object

The Loot Winner object will also be related to a Campaign Prize Item. Using your newly acquired knowledge about creating Lookup relationship, lets create another lookup field with the following details.

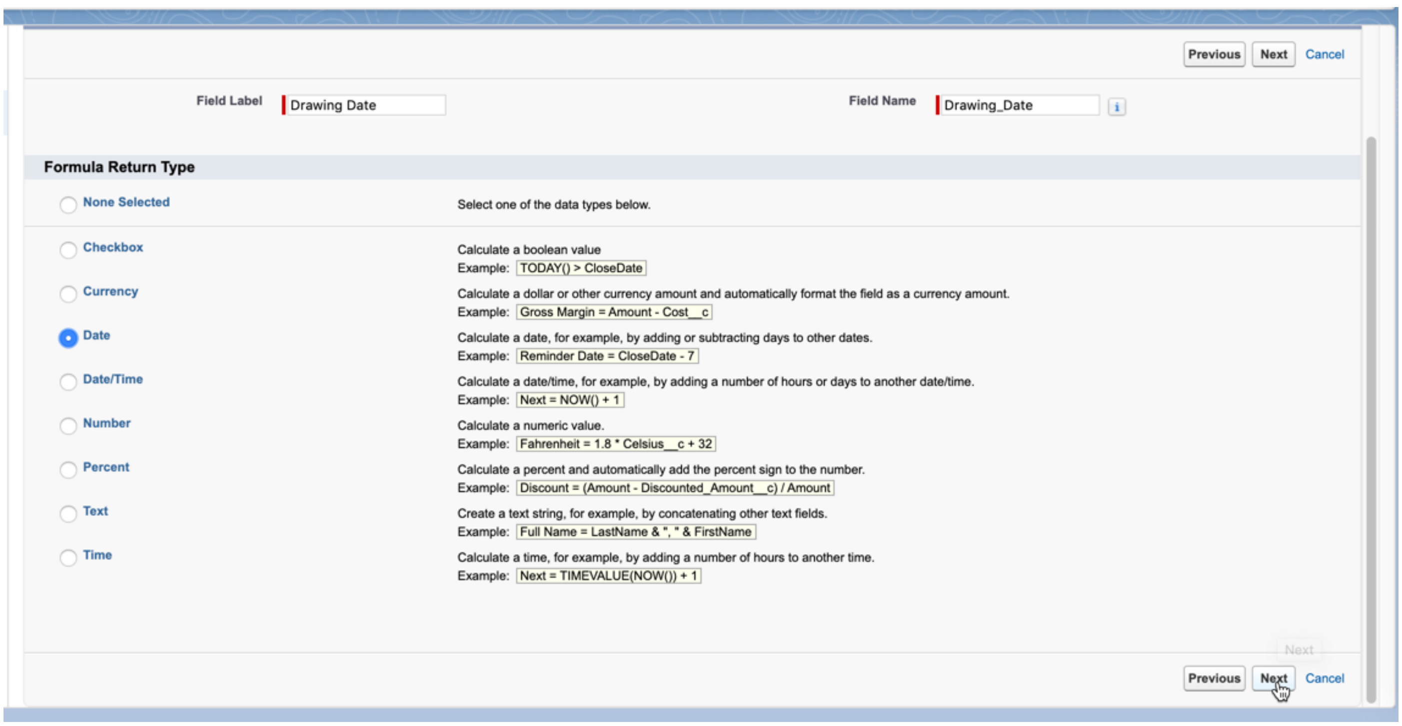
Parameter	Value
Field Type	Look Up
Related To	Campaign Prize Item
Field Label	Prize
Field Name	Prize
Description	The Campaign Prize Item which the Participant has won
Help Text	The Campaign Prize Item which the Participant has won
Profile	*Default Selection*
Page Layout	*Default selection*
Add Custom Related Lists	*Default Selection*

Create the Drawing Date Field for the Loot Winner Object

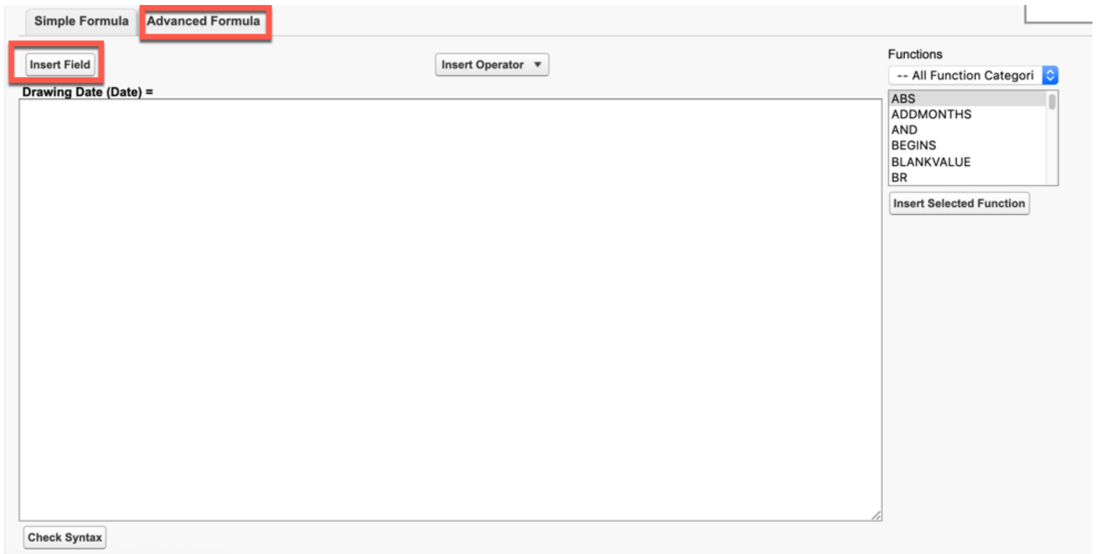
Formula fields in Salesforce are similar to Formula fields in Excel. Their values are calculated based on values of other fields, both of the object as well as fields of related objects.

In this case we want to see the date that the participant won a specific prize related to a loot campaign. We will calculate this date based on the 'Last Prize Win' field of the Participant object that we created earlier.

1. Start the **New** field wizard.
2. Select **Formula** data type.
3. On the **Step 2. Choose output type** screen choose enter the **Field Label** as **Drawing Date.** The **Field Name** will auto populate when you tab out of the Field Label input.
4. Select the **Date** return type and click **Next**.



5. On the following screen click the **Advanced Formula** tab. Click on the **Insert Field** button.



6. On modal window that opens up Select **Loot Winner> Participant > Last Prize Win** and click **Insert**. This is a very simple function. You can write a variety complex functions using multiple fields. Optionally, click the **Check Syntax** button to check the validity of the formula.

7. **Click** Next and accept the default options on the following screens before finally clicking Save.

You just created a new object and added a few fields to the object. Along the way you also set the security permissions for those fields and added them to the UI for the object. Next up, let's create the application and UI for the Loot Administration as well as the Loot app.

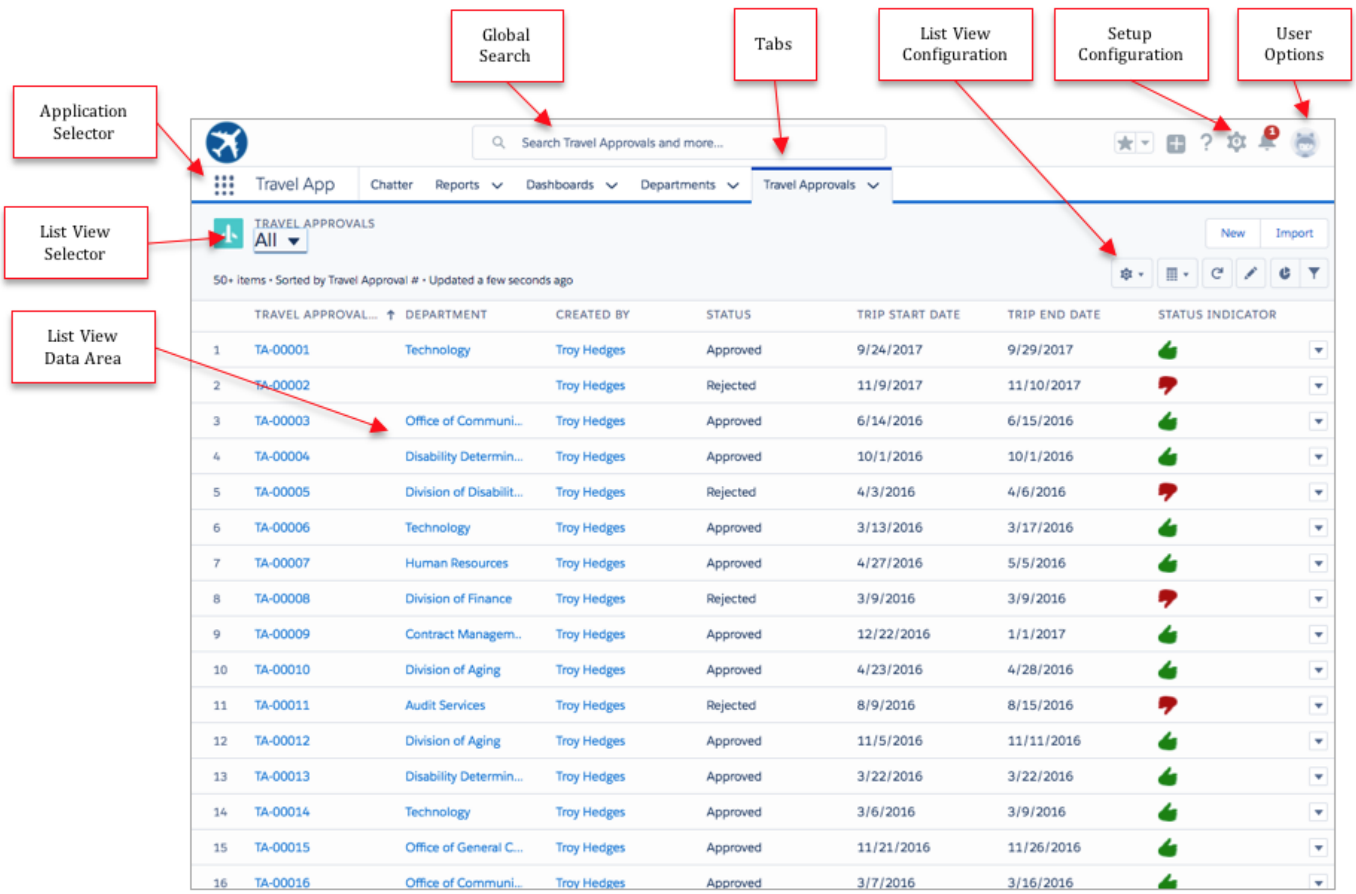
Lab 2 - Create the Application and Tabs

Salesforce Terminology & Navigation: Orientation to the User Interface

Duration: 15 minutes

When learning a new application, platform or development paradigm for the first time, two of the most important things to learn are (1) Terminology and (2) Navigation. This following section will give you the tools you need to understand Salesforce terminology so you will be able to navigate and complete the subsequent exercises.

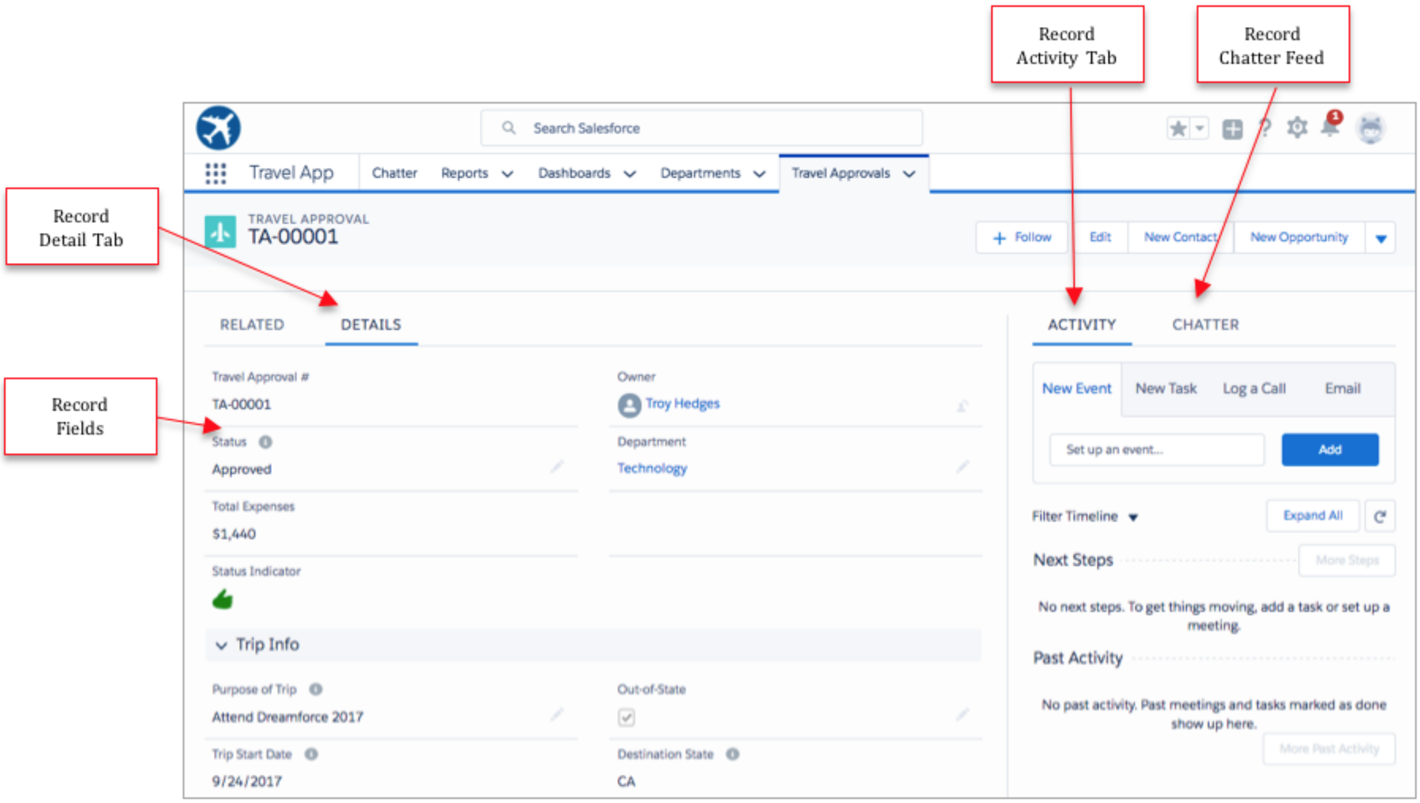
Below is a screenshot of a Travel Approval application. Highlighted are the main functional areas you will use in this workshop and a description of each is provided below.



Salesforce user interface functional areas (starting in upper right):

- **User Options** – provides configuration options tied to your user account such as login session and user profile. You can logout of the system or edit your user profile for changing information like email address, password, contact information, time zone, etc…
- **Setup Configuration** – *Setup* is the place where Administrators will spend lots of their time when configuring Salesforce to meet their business needs. This is only provided to Administrators and provides access to all setup capabilities such as creating new applications, creating new custom objects and custom fields, creating users and user profiles, configuring page layouts, and many other options.
- **Global Search** – Salesforce has a rich Google-like search engine for easily finding information throughout the system. Salesforce will search across all data in the system and provide a response list that is grouped by object types for easily finding the information you need.
- **Application Selector** – Salesforce supports the ability to create many applications and provide access to users of the system via the built-in security model. A user can use the application selector to switch between applications that he/she has been given access to. In the workshop, we will be creating a new application that will be available in this menu.
- **Tabs** – a Salesforce application is made up of one or more tabs. When a user switches to a new application, the tabs will adjust based on which tabs have been configured for that application. Each Tab can be thought of as a logical business entity like an Account (Business), Contact (Person), Travel Request, Report and so on. The Tabs represent “data objects” or things you track in your business. Some data objects are delivered out-of-the-box in Salesforce and some will be “custom objects” that you create.
- **List View Selector** – A list view is a set of search conditions that display records that match the search conditions. For example, a view of contacts that have "Birthdays This Month" would filter your list of contacts based on a search for birthdays falling on a day in the current month. By default, Salesforce.com includes a number of views for each screen Tab/Object. The List View Selector allows you to switch between the list views that have been configured for that object.
- **List View Configuration** – this option provides capabilities to create new list views or modify existing list views. You can change such options as the title, the filter criteria, or the columns to show in the data table section. You will create a custom list view in this workshop to show open travel approvals.
- **List View Data Area** – this is the table area that shows all records that match the list view selected. As mentioned above, the list view will define the filter criteria and columns to show for the records that it finds.

The typical interactions a user has with the Salesforce interface is to use the tabs to focus on the type of object you are interested in. You use configured list views to filter the records associated with that object where a record can be thought of as a row in a database. Then in the list view table section, you click on a record to drill in to the details of that record. Below is a sample screen that shows the details of a record.



Salesforce record detail user interface functional areas:

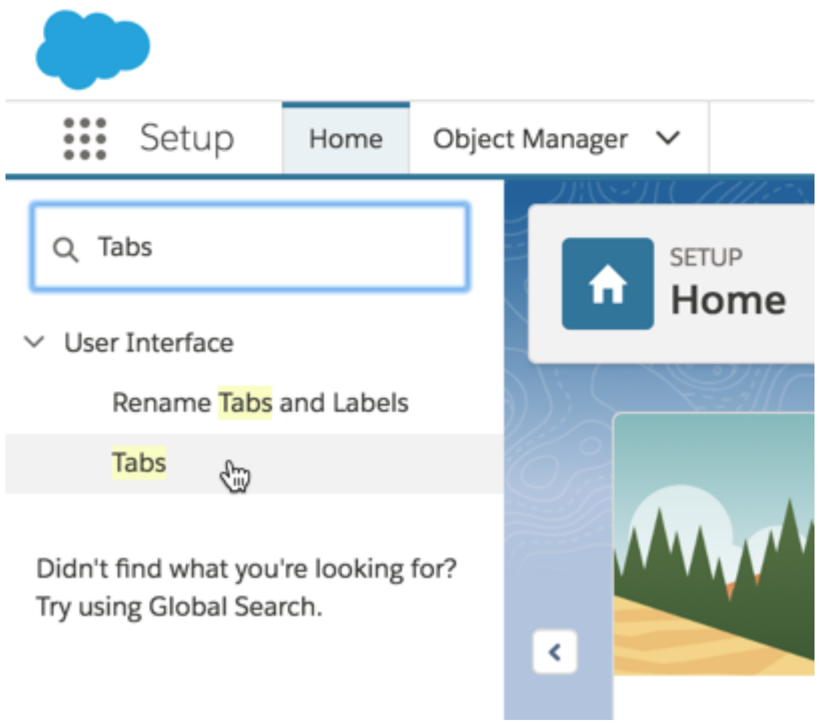
- **Record Detail Tab** – this tab shows the actual field information for the chosen record. The fields and field sections shown on this page can be configured by administrator and different views (i.e. page layouts) can be configured for different users. Thus, one user could have a different view of the field level data than another user.
- **Record Fields** – this is area where all fields are shown for the current record. As mentioned above, the fields shown on this area are totally configurable and different page layouts can be created to show different views to different users.
- **Record Activity Tab** –this is tab for users to enter activities such as logging a call, creating new tasks, or logging a meeting. This section also includes a chronological timeline of the activities that have occurred and those that are scheduled in the future.
- **Record Chatter Tab** - Chatter is Salesforce's social collaboration tool that is native to the platform. With Chatter, you can collaborate with people both inside and outside your organization on individual records of data (e.g. Cases, Contacts, Referrals) and on common topics of interest using Chatter Groups. The Chatter "feed" allows a user to post comments, @Mention co-workers, add files, initiate polls, and perform "actions" such as creating a note, adding a task, updating a field, or sending an email. In addition, you can "follow" a record of data much the same way you can follow your favorite sports team on Facebook. When you follow a record in Chatter, anytime the record is updated, an entry is made on the Chatter "feed" so followers are instantly aware of the updates related to that particular record.

When viewing records in Salesforce, you have option to view the child objects related to your record. These related child objects are referred to “related lists” in the user interface. Below is screenshot of record where the related lists are being shown.
Salesforce user interface functional areas:

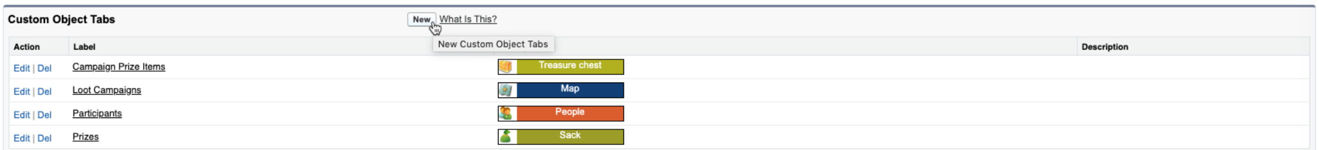
- **Related Tab** – click this tab to see the related lists (i.e. child objects) that are linked to this record
- **Related Lists -** related lists are a set of (child) related records associated, in this example, to the travel approval record you created. The Related List objects like (expense items, notes, approval history) have a relationship in the data model (schema) to the Travel Approval object. Related lists of records usually have either a 1:M, M:1 or M:M relationship with the parent object.

Create a Tab for the Selected Loot Items Object

1. From Setup, enter **Tabs** in the Quick Find box, then select **Tabs**



2. In the Custom Object Tabs section, click **New**



3. From the Object picklist, select **Selected Loot Items**.

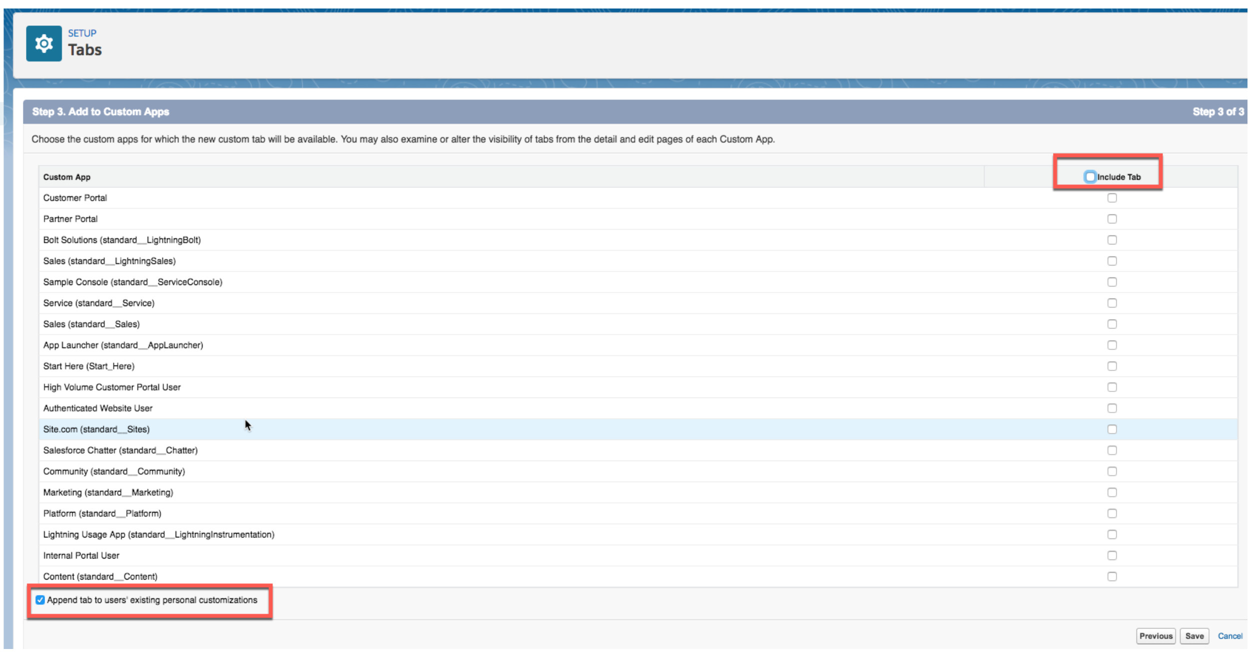
4. For the Icon, Click  and select **Star** 

.

5. Click **Next**.

6. Tabs can be left hidden or visible for all profiles or, be made visible to only certain profiles. Leave the profile selection as is and click **Next**.

7. In the Add to Custom Apps section:
   - Deselect **Include Tab**.
   - Select **Append tab to users' existing personal customizations**.



8. Click **Save**.

Create a Tab for the Loot Winner Object

Just like you created a tab for the Loot Winner Object. Select the ‘Stacks of Cash’

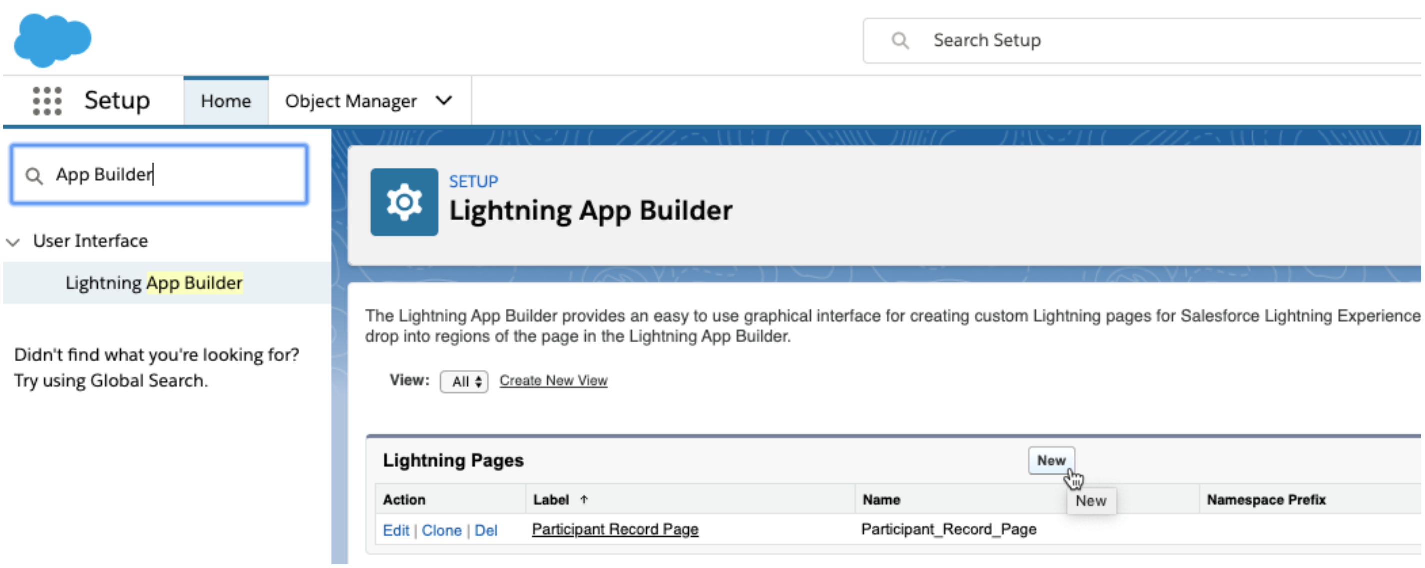
icon for the tab. Choose the default options for profiles and remember to deselect the ‘**Include Tab**’ and ‘**Append tab to users’ existing personal customizations’** checkboxes**.**

Create an App Page for the Loot App

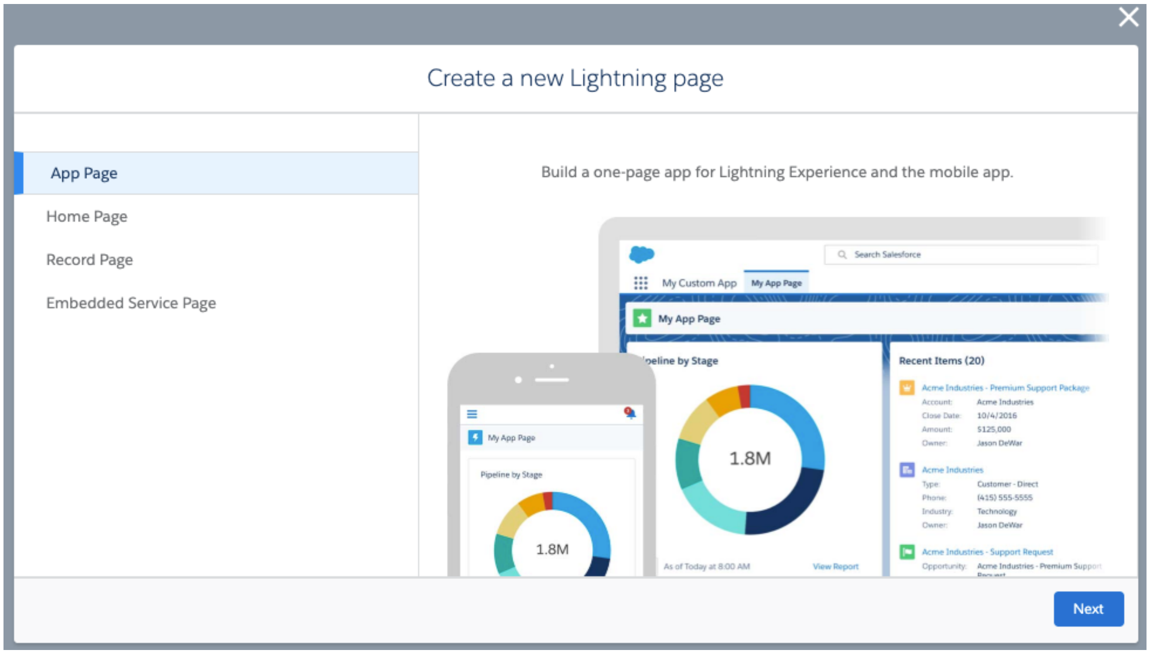
Salesforce Tabs are the landing pages for Salesforce Objects but they can also be a collection of standard and custom components assemble for specific use cases and audiences.

The Loot App will be the landing page for the end users of the Loot App who will be able to participate in a Loot Campaign and select Loot items in a specific preference, all based on how the Campaign is setup by the administrators. There are some custom Lighting Web Components that we have built for this purpose. The components use the same underlying data model that we have built so far. Let’s take a look at how you can build an App Page using the Lightning App Builder.

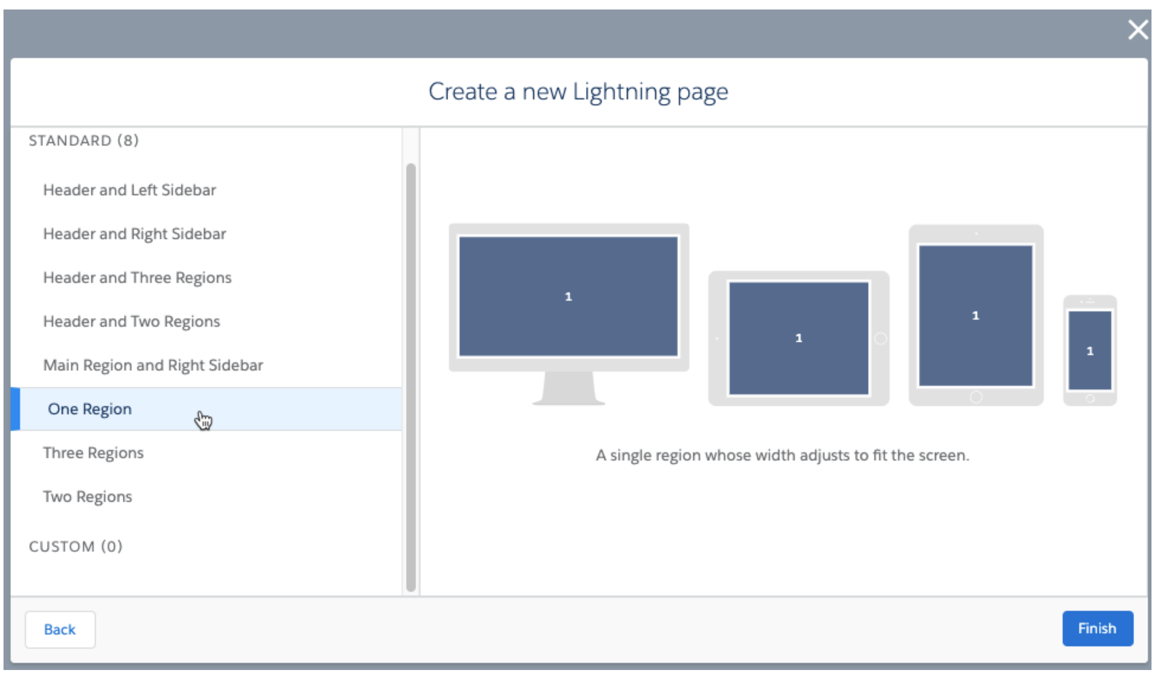
1. From **Setup**, enter **App Builder** in the Quick Find box, then select **Lightning App Builder**.
2. Click **New** on the Lightning App Builder page.



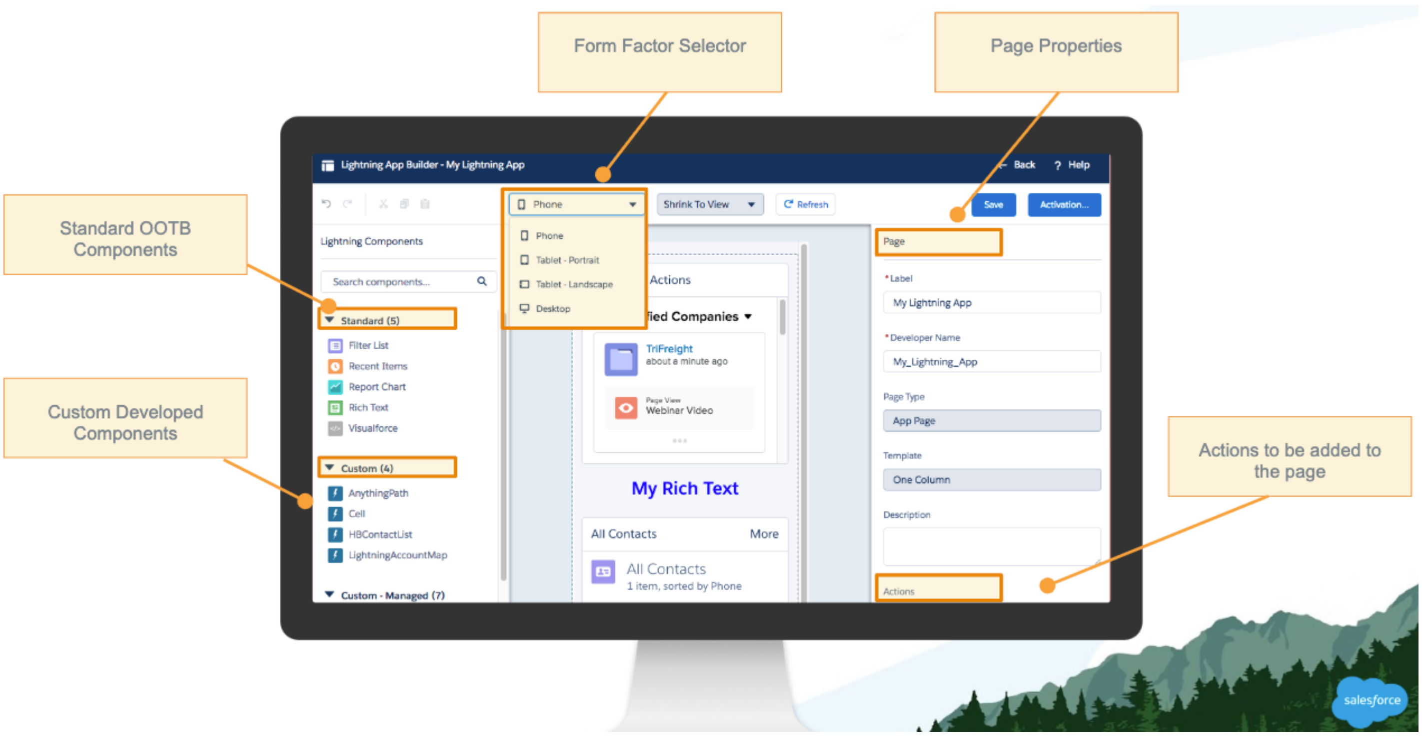
3. Select **App Page** and then click **Next**.



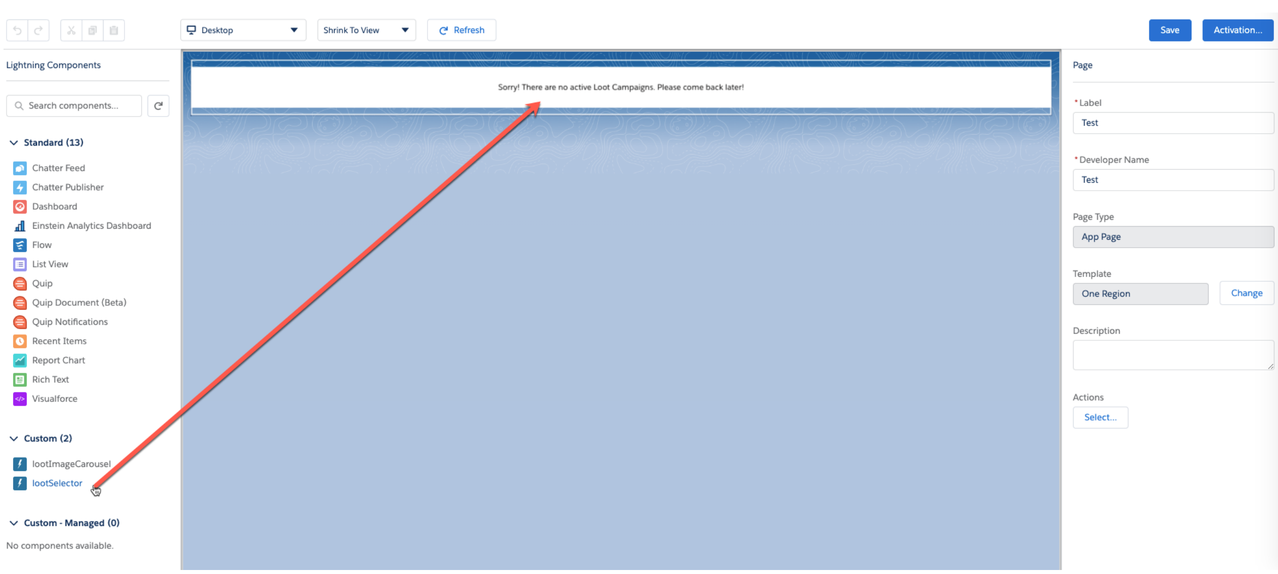
4. On the next screen, enter **Loot** as the page label and click **Next**.
5. The following screen gives you the option of selecting out of the box as well as custom page templates created by your developers. Select the **One Region** template and click **Finish.**

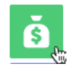


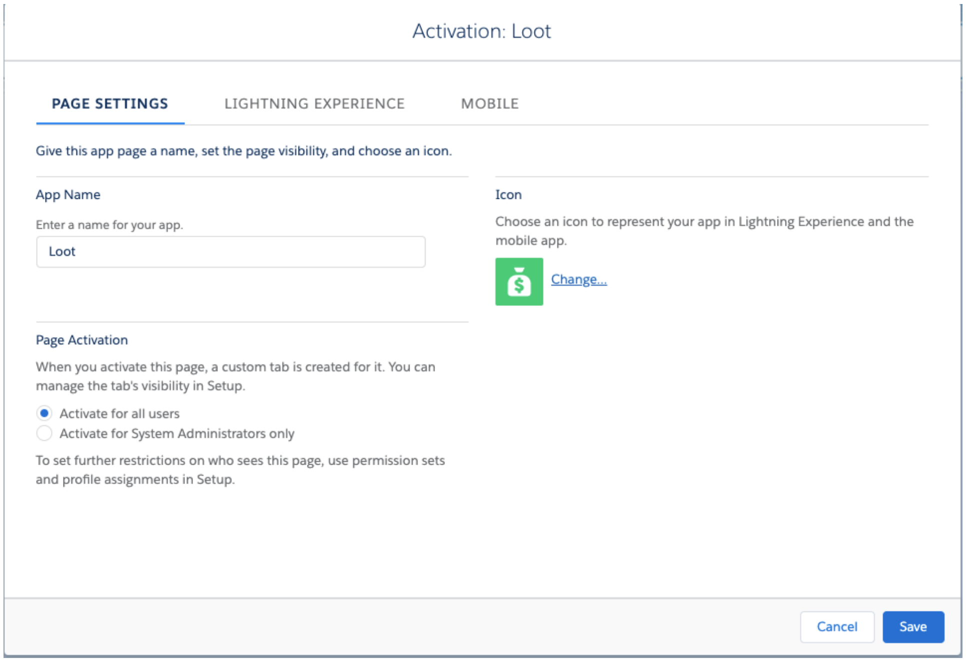
6. The next screen that loads is the Lightning App Builder that allows you to use drag and drop tools to assemble components that appear on the page. Developers can also dynamically make components visible based on either specific user attributes or if a specific record meets certain criterion. Once a page is built, it can be made visible to specific profiles.



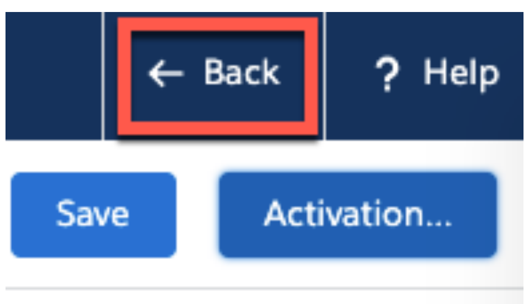
7. Drag the **lootCarousel** component on to the Canvas. We haven't created a campaign or associated prize items yet so you will see no data render in these components.



8. Click **Save**. On the confirmation message that appears, click **Activate**. Change the icon of the App Page to the sack of cash icon 



9. Click **Finish** on the confirmation message that pops up.
10. Click the **Back** button on the top right corner to go back to the **Setup** menu.



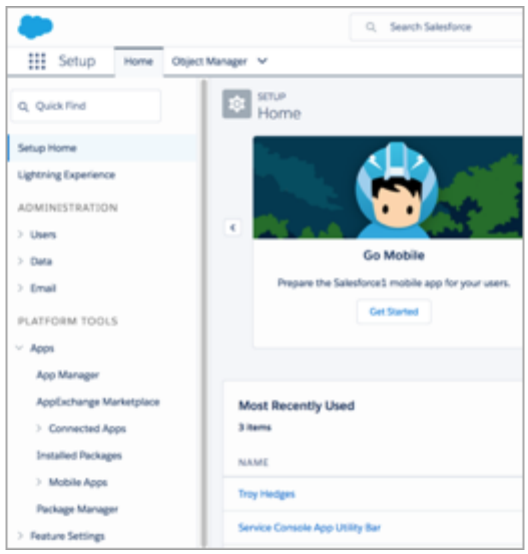
11. Navigate to the **Tabs** section using the **Quick Find** search. You will see the **Loot** tab listed under the **Lightning Pages** tab section. Now onto creating the apps!

Create the Loot Administration App

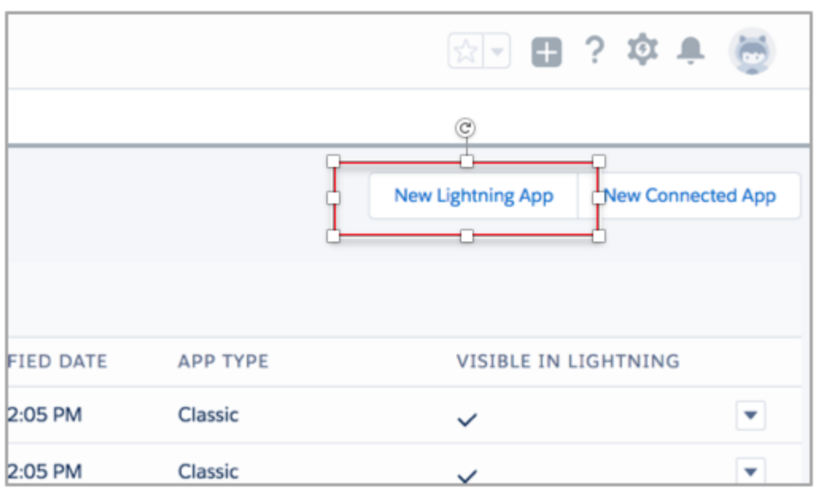
The next thing we need to do is to create the **Loot Administration** app that allows Loot Campaign administrators to create and manage campaigns, related prizes, participants, their loot selections, track winners and report on all of this data s well . Remember that a Salesforce application is a grouping of tabs that give you access to corresponding object data.

1. Access the **Setup** menu

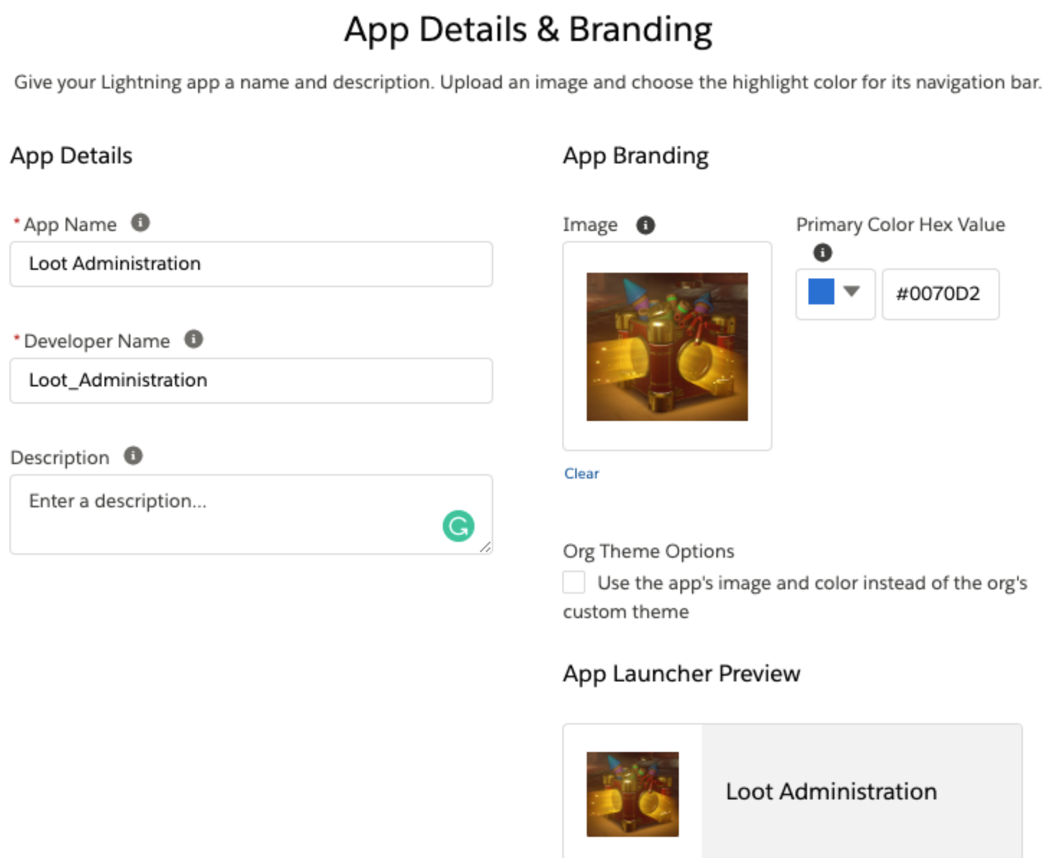
2. In left-hand side of main window, click on **Apps > App Manager**. Remember you could also search for App Manager in the Quick Find search box.



3. Click **New Lightning App** in the upper-right area.



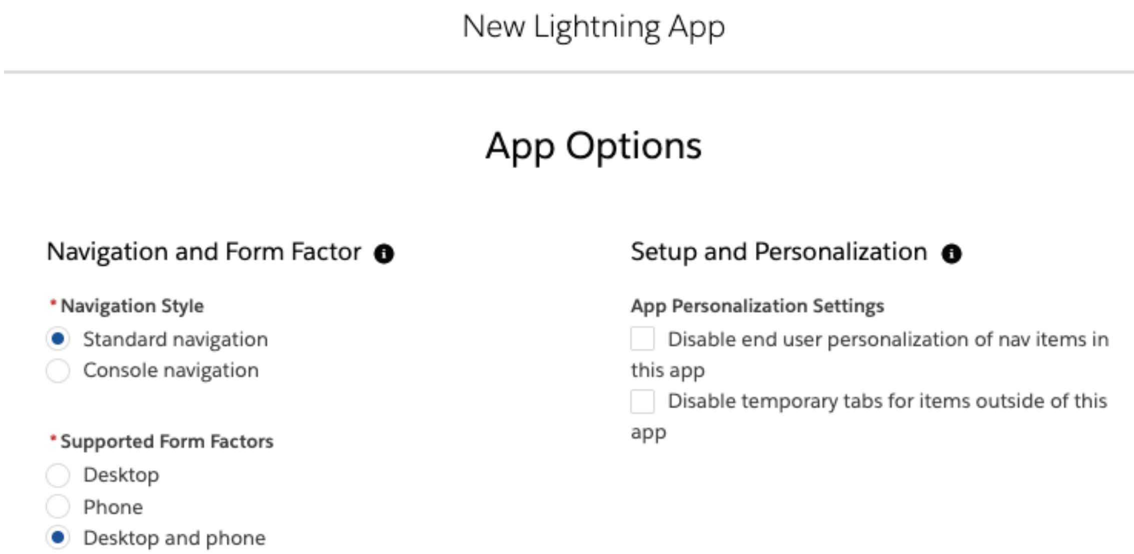
4. On the “App Details & Branding” window, enter the following:



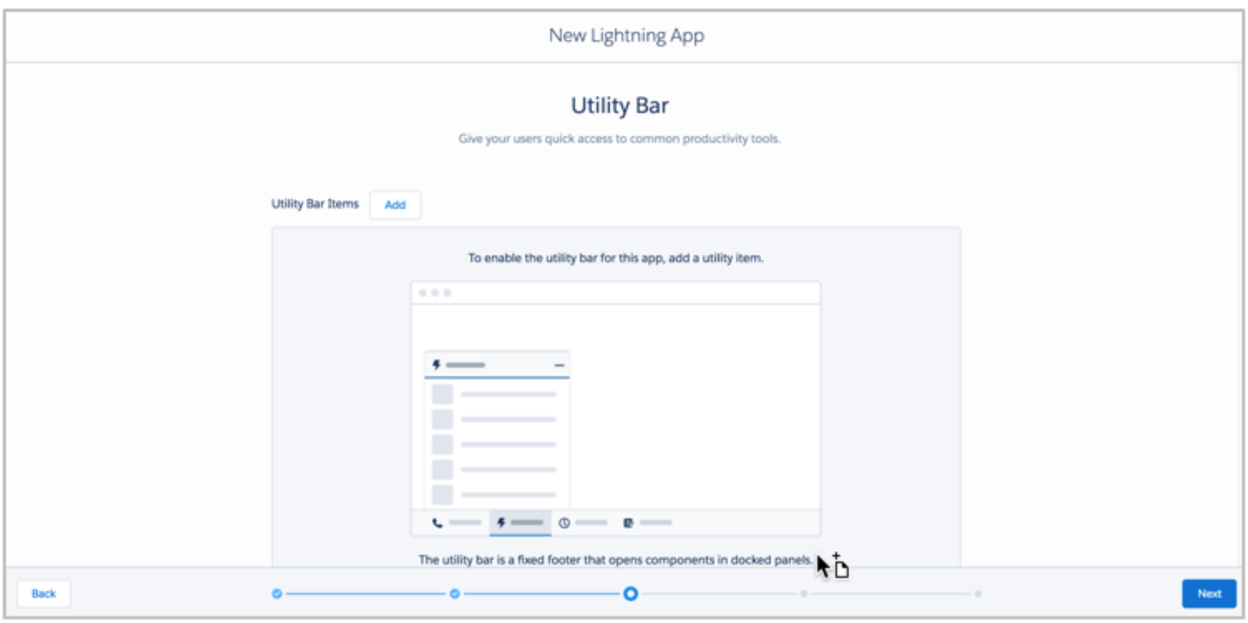
Parameter	Value
App Name	Loot Administration
Developer Name	Loot_Administration (Auto populates)
Image	Upload the ‘**Loot_Admin_Logo.jpg**’ image from the **Salesforce Workshop** folder you downloaded

5. Click **Next** button in lower-right.

6. On **App Options** screen, select **Standard navigation** for Navigation Style, **Desktop and Phone** for Supported Form Factors, and click **Next** button.

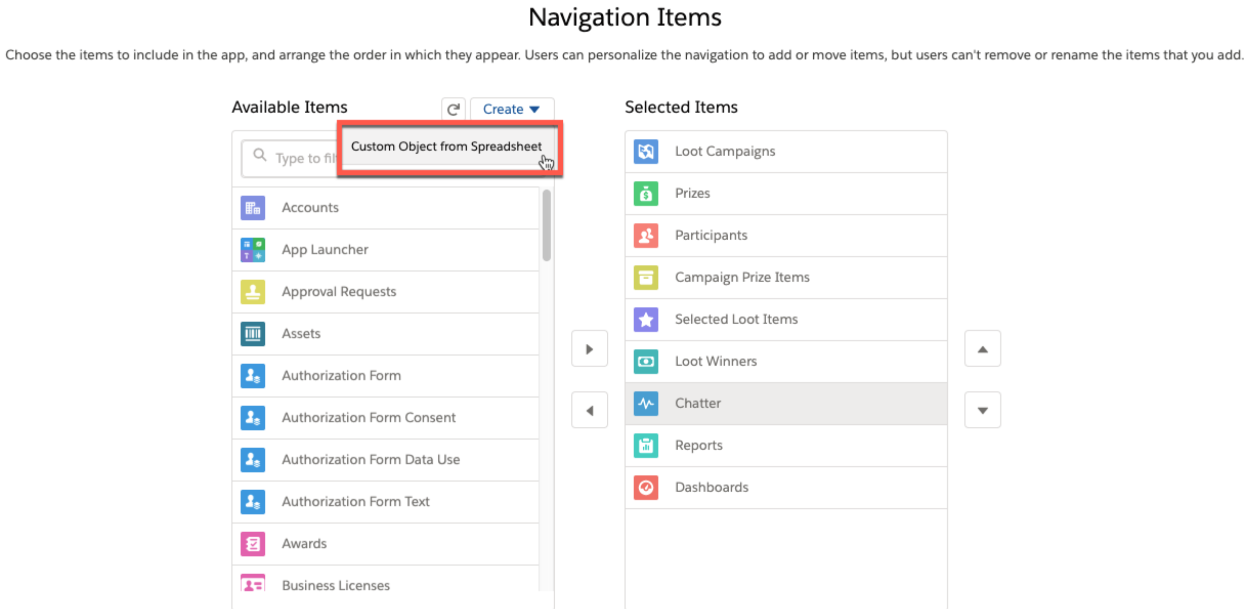


7. Utility items in a Lightning App are items that your user can access quickly. These can be out of the box features such as Notes, recently accessed items, report charts etc. as well as custom developed features. For now, we will not add any utility bar items. Just click the **Next** button.

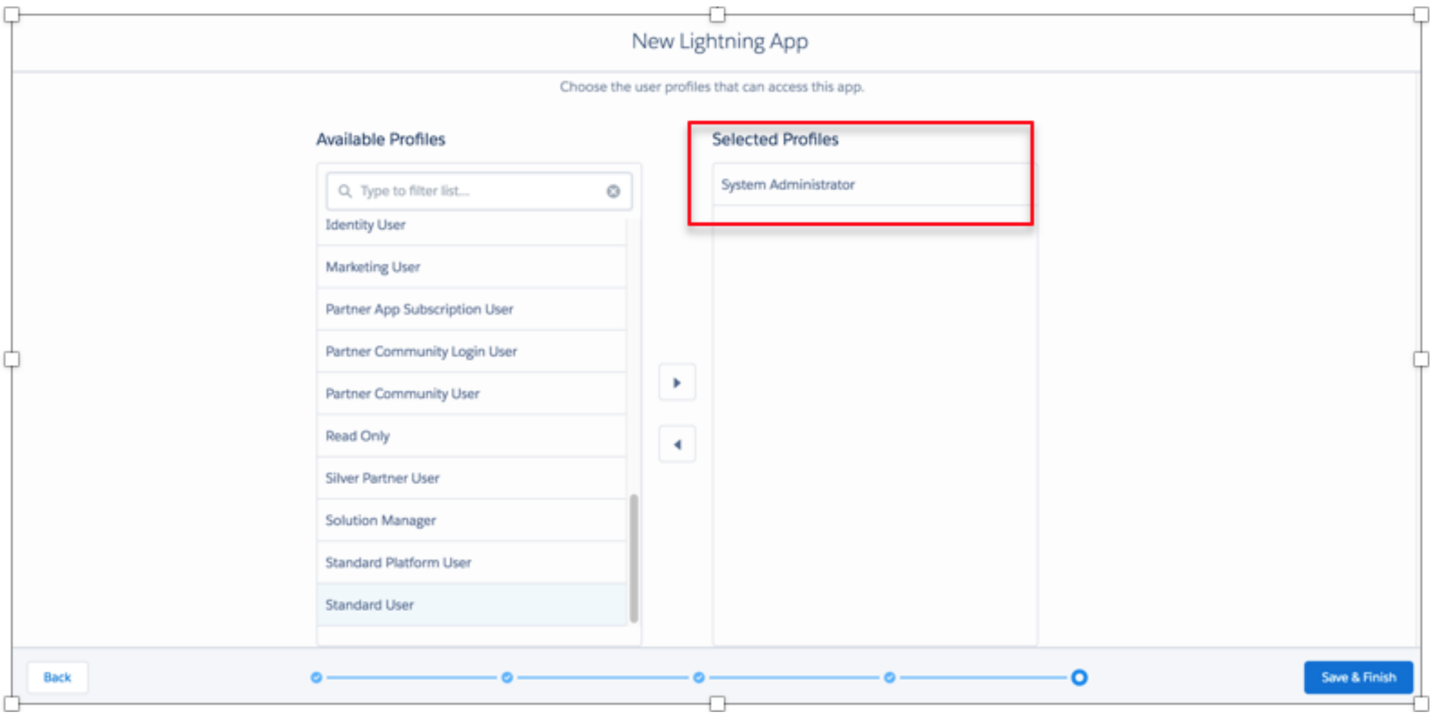


8. On **Select Items** screen, select the following tabs from the Available Items side and move them over to the Selected Items side: **Loot Campaigns, Prizes, Participants, Campaign Prize Items, Selected Loot Items, Loot Winners, Chatter, Reports and Dashboards**. Your screen should look like the following.

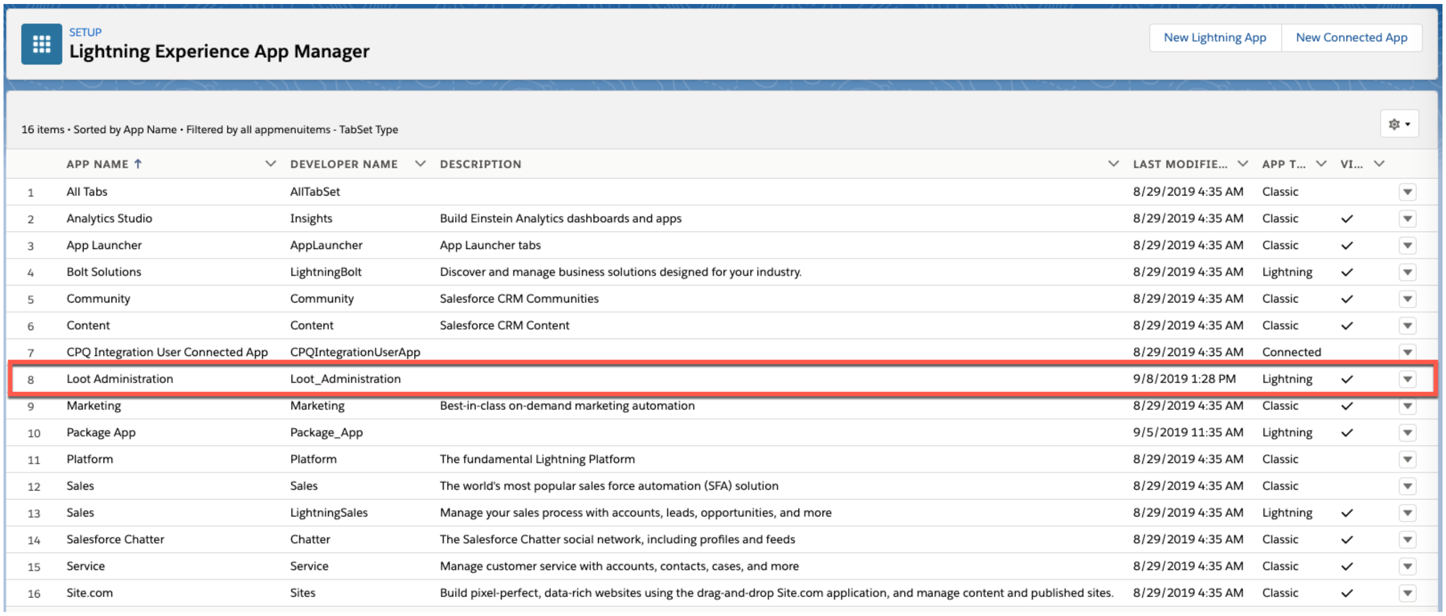
Notice that you can create an object and a tab by using the **Custom Object from Spreadsheet** aka Lightning Object Creator. Click the **Next** button.



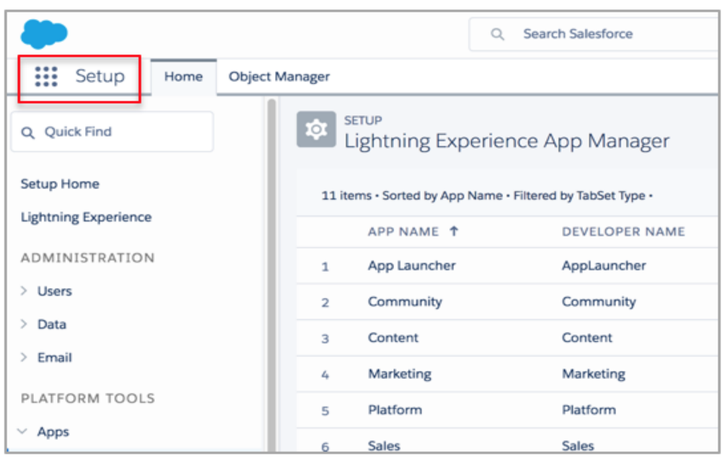
9. On the **Assign to User Profiles** screen, select **System Administrator** like the following screen. Click **Save & Finish** button in lower-right.



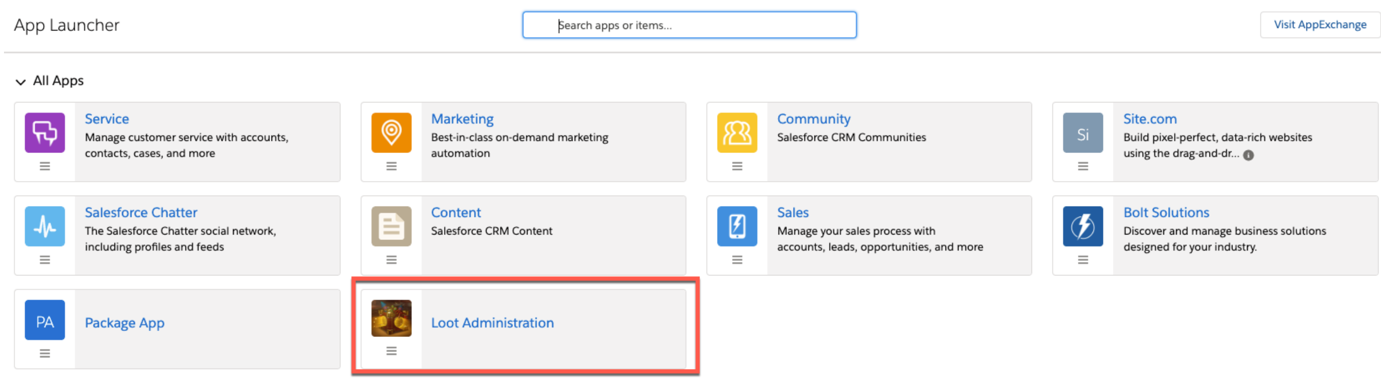
10. You should now see the new **Loot Administration** app on the **App Manager** screen like the following:



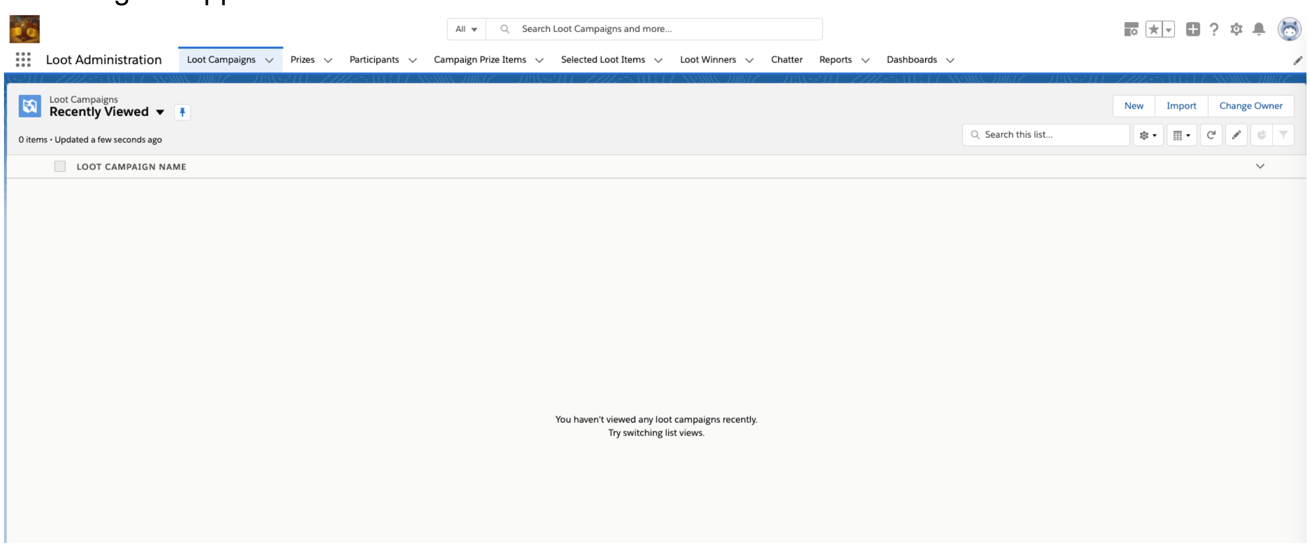
11. Let's now navigate to the **Loot Administration** application to see what it looks like so far. We will use the application selector to accomplish this. Click the application selector, also known as the 'waffle icon' on the top left of the screen. Click that and select the **Loot Administration** application (see next page).



12. An application selector window will pop-up. Click on the **Loot Administration** app to select it. You can reorder the app tiles as per your preferences



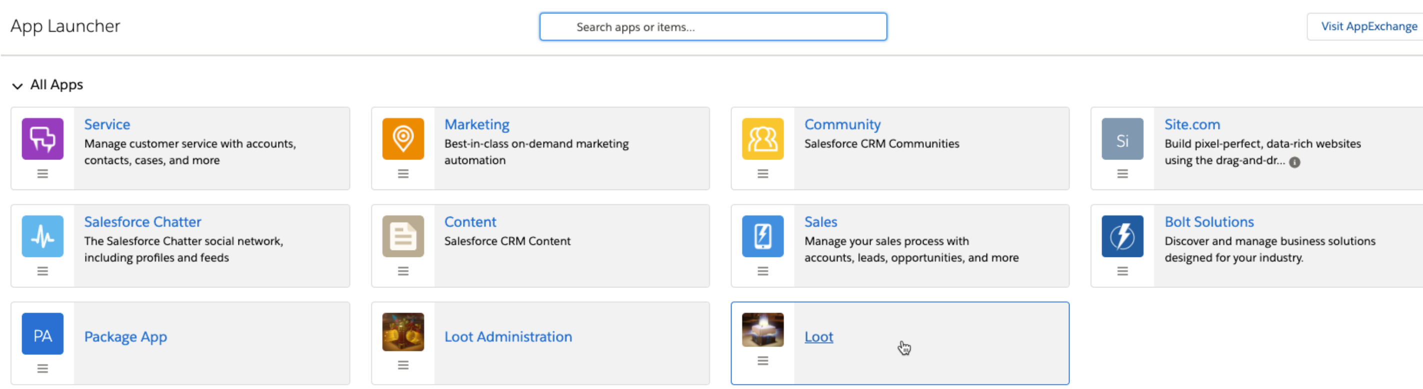
Your window should now look like the following. Note it has all the tabs you selected while creating the app.



Create the Loot App

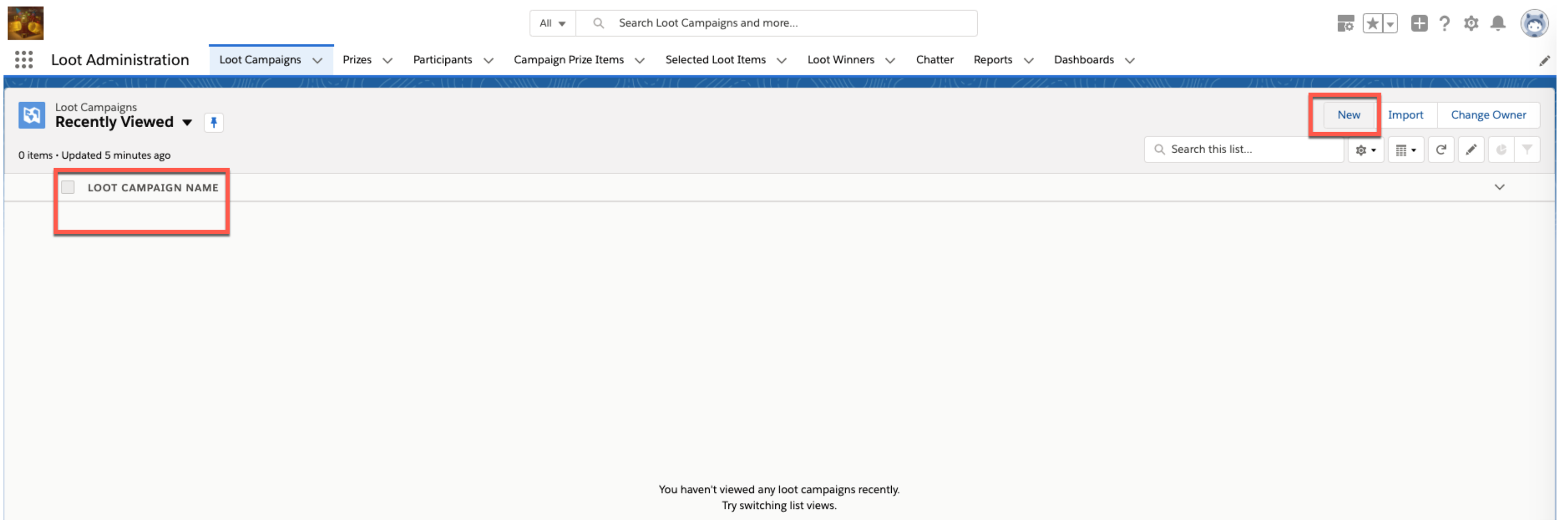
Just like the Loot Administration app, go to the **App Manager** in Setup and create the **Loot** app.

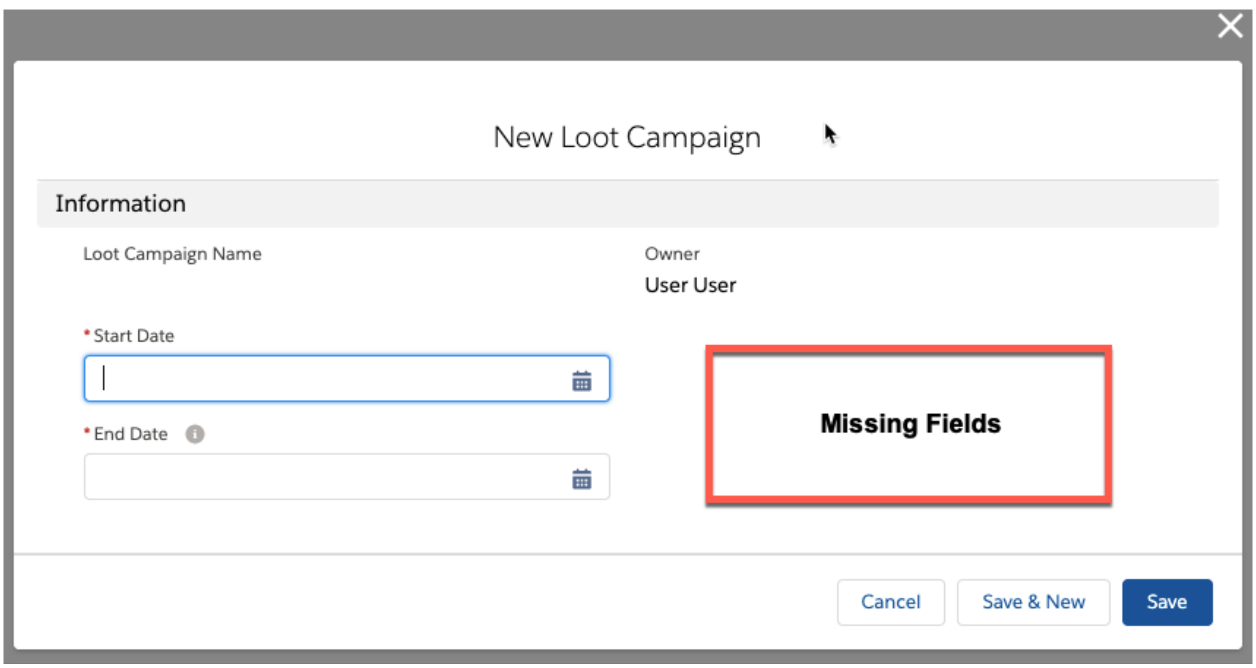
1. Name your App **Loot**.
2. Use the **Loot App.jpeg** image as the image logo.
3. Choose **Standard Navigation** for Navigation Style.
4. Choose **Desktop** for Supported Form Factors.
5. Skip adding **Utility Items.**
6. Add the **Loot** Lightning Page Tab from Available Items.
7. Choose the **System Administrator** and **Standard User** profiles.
8. Click the **App Launcher** and confirm that the **Loot** app is visible.
9. We will visit the app after we enter some data for Loot Campaigns and Prizes.



Lab 3 - Manage Page Layouts and List Views

Access the **Loot Administration** app via the App Launcher. While on the **Loot Campaigns** tab you will notice a few things. First, while on the **Recently Viewed** list view you only see the **Campaign Name** tab. Second, if you click the **New** button on the top right corner of the list view to create a new Loot Campaign, you will see that the ‘**Region**’ and ‘**Active?**’ fields are missing from the page.





Let’s see how we can modify the page to add fields to both the list view as well as the record forms.

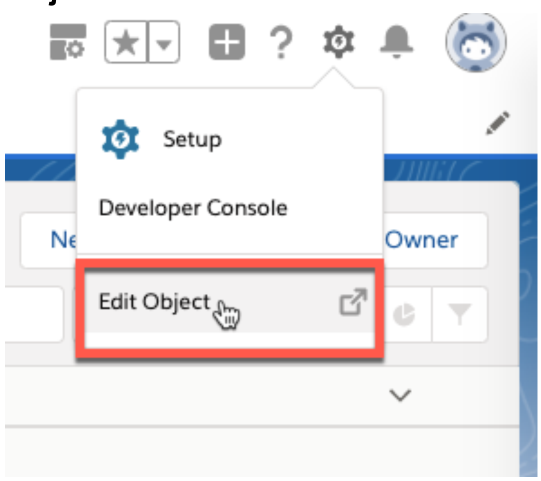
Modify the Page Layout of the Loot Campaign Object

A page layout determines the fields, sections, related lists, and buttons that appear when users view or edit a record. You can modify an object's default page layout or create a new one.

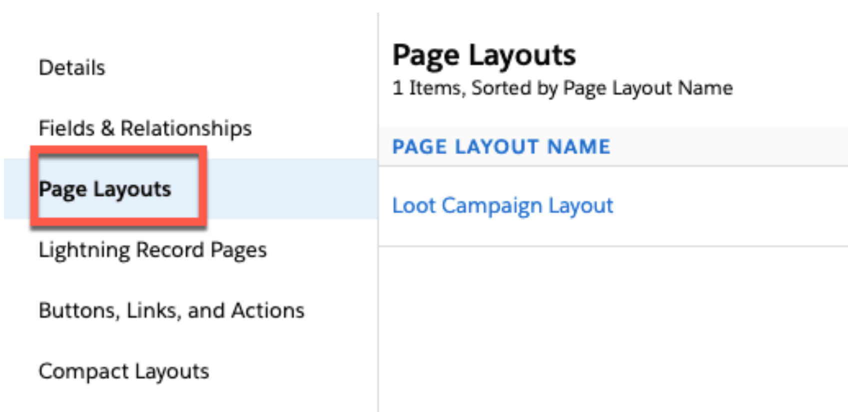
You can customize a page's contents, such as the fields and buttons that appear on the page, by using the page layout editor tool. The page layout editor helps you manage the content of pages in both our Classic UI and in Lightning Experience. The page layout editor is what we'll be working with in this section.

We will now adjust the user interface for the Loot Campaign object to better suit our requirements.

1. While on the Loot Campaign tab, click the setup gear icon on the top right corner of the screen and click **Edit Object.**

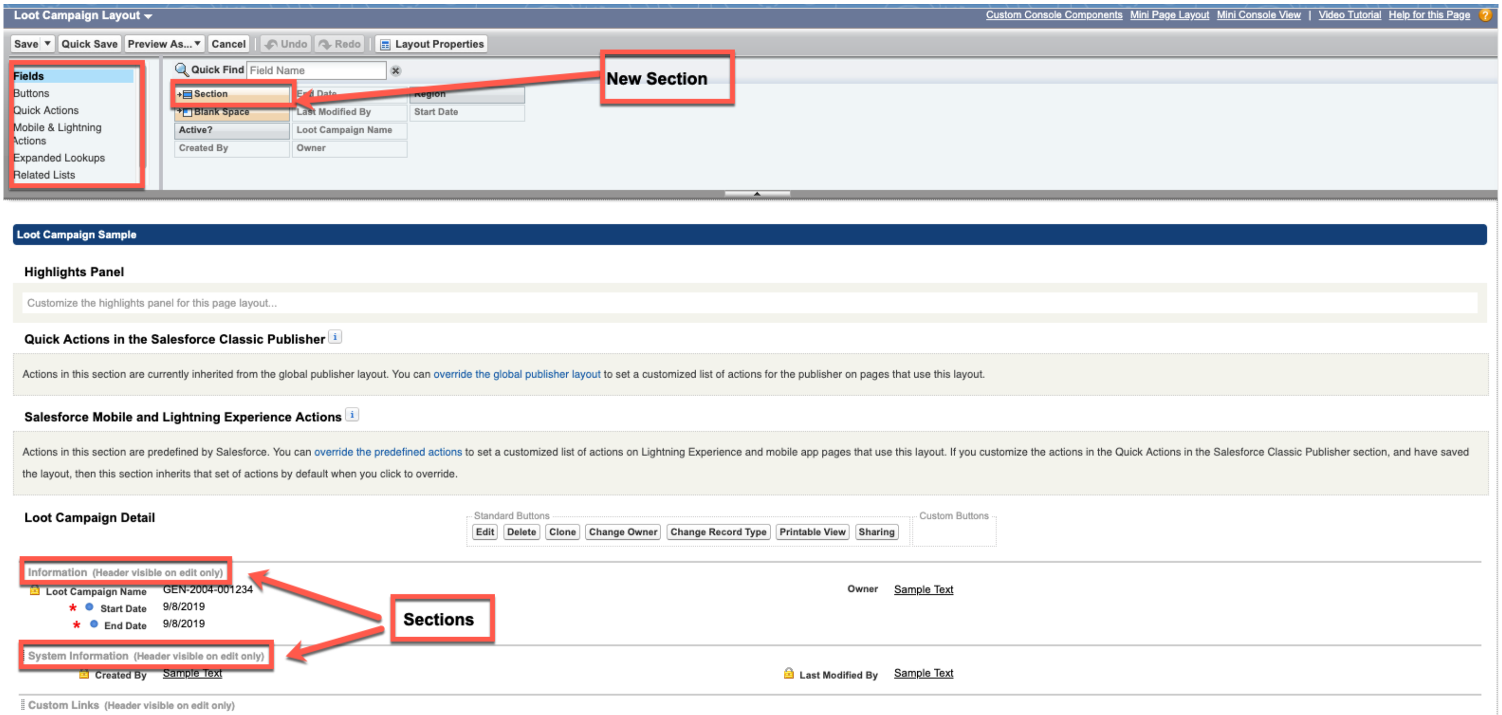


2. The **Loot Campaign** object details page opens in a new window. Click on the **Page Layouts** link on the left side of the page. Click on the **Loot Campaign Layout** page layout.

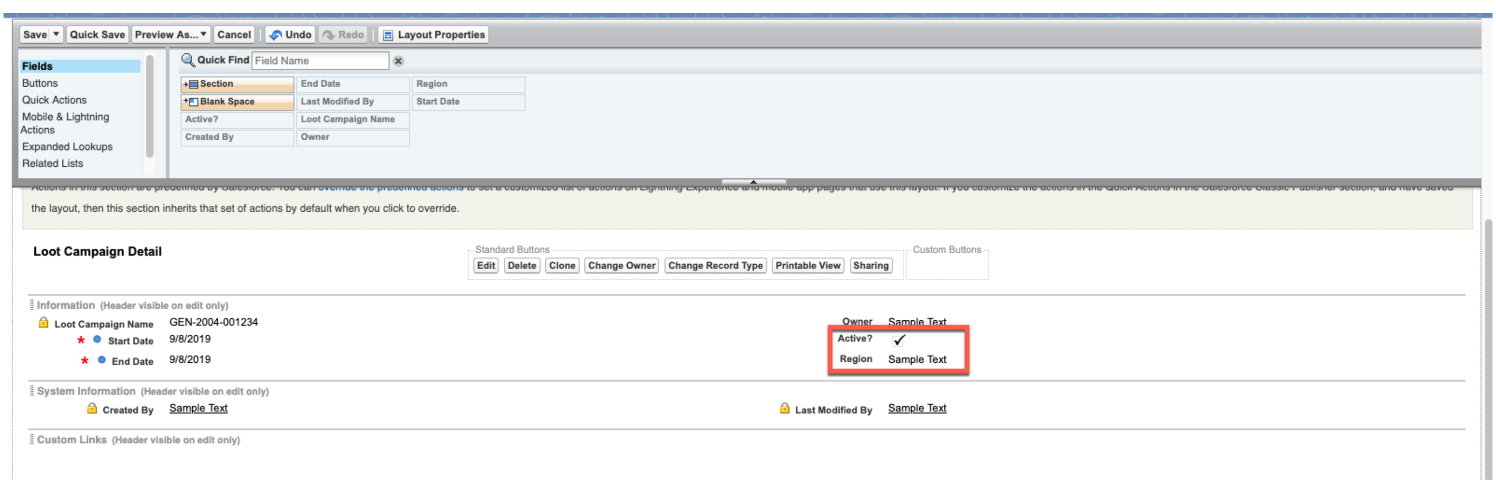


3. You are now taken to the page layout editor as shown below. The layout editor allows you to configure which fields, buttons, or related lists are shown on the page. The types of entities that can be added to the page are on the top left corner of the screen.

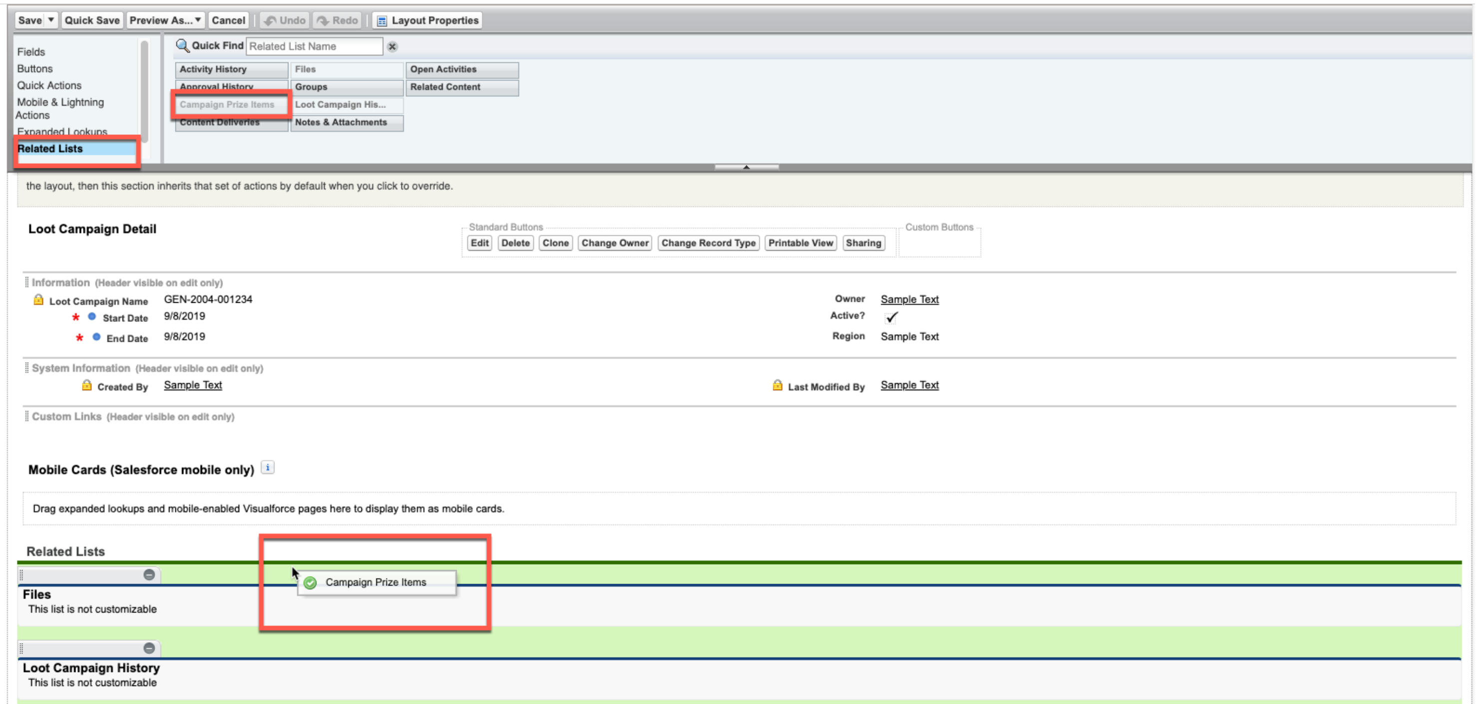
   The Information and the System Information are default sections on the page layout. You can optionally add new sections on the page as well.



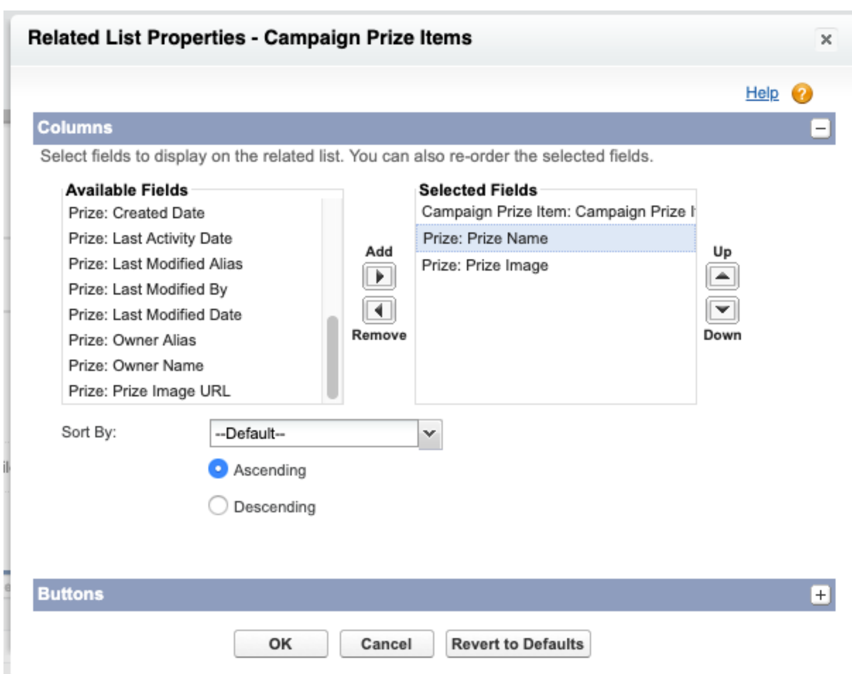
4. Let's add the '**Region**' and '**Active?**' fields to the **Loot Campaign Detail** section. Drag the fields to the Information section. Set them in the appropriate columns as shown in the image below. Your screen should look like following

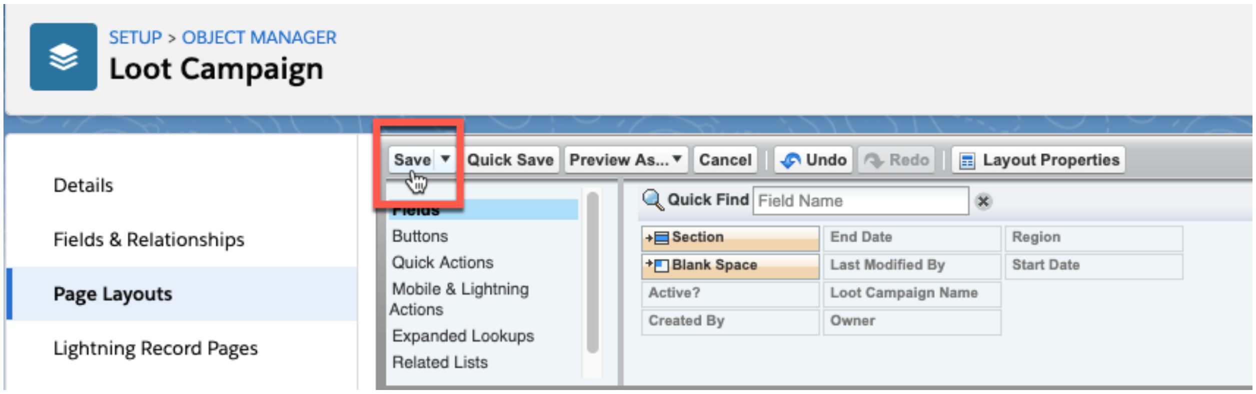


5. Let’s also add the ‘Campaign Prize Items’ related list to the Loot Campaign page layout. Click on **Related Lists** on the left side of the page. Drag the **Campaign Prize Items** relates lists to the top of the **Related Lists** section and click **OK**.



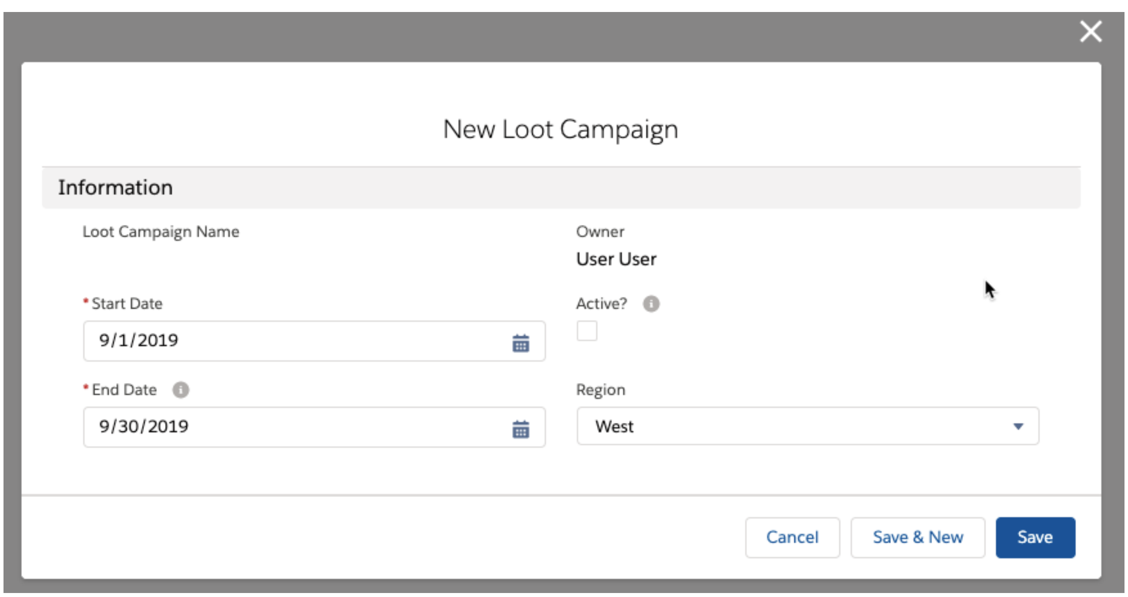
6. Let’s adds columns to the **Campaign Prize Items** related list. Click the wrench icon . Choose the **Prize Image** and the **Prize Name** fields to the **Selected Fields** section. Click **OK**.



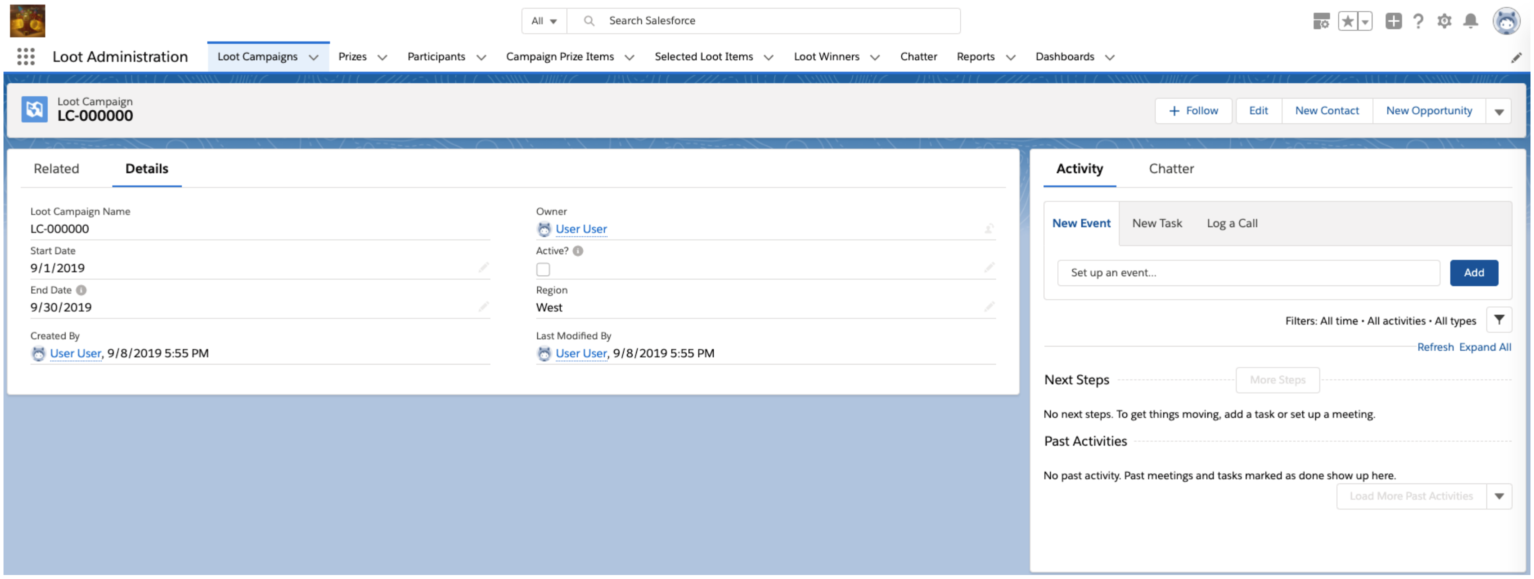


7. Click on **Save**.
8. Navigate back to Loot Campaign tab and click on the **New** button on the list view tab. You should see the Region and Active? Fields on the record creation form. Enter the following details for the new Loot Campaign record.

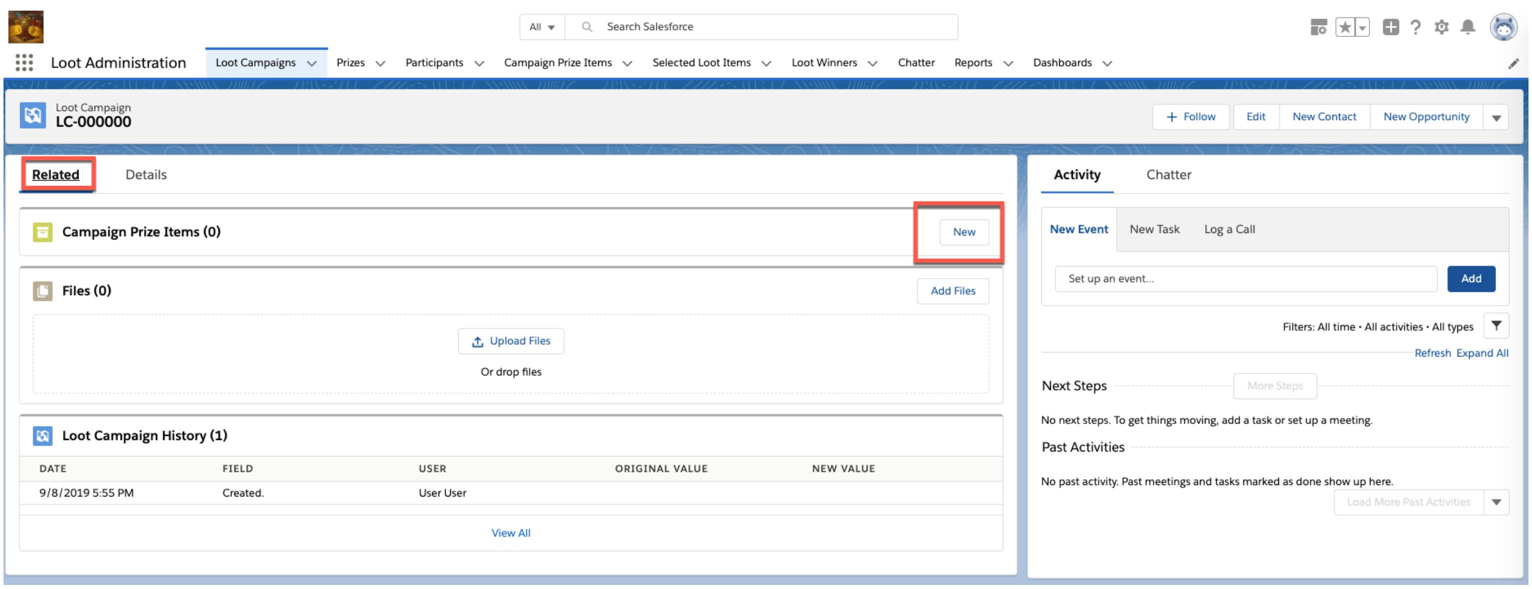
Field	Value
Start Date	9/1/2019 (You can also use the date picker)
End Date	9/30/2019
Active?	Unchecked
Region	West



9. After you click **Save**, you will be redirected to the newly created record.



10. Click on the **Related** tab to see the related list for this record. Notice that you can create new records of the related objects from the related lists.



Modify the Page Layout of the Participant Object

Remember the **Last Prize Win** field we created for the **Participant** object? When you create a field via the Schema Builder, it isn't automatically added to the object's page layout. Let's add the **Last Prize Win** field to the **Participant** object's page layout.

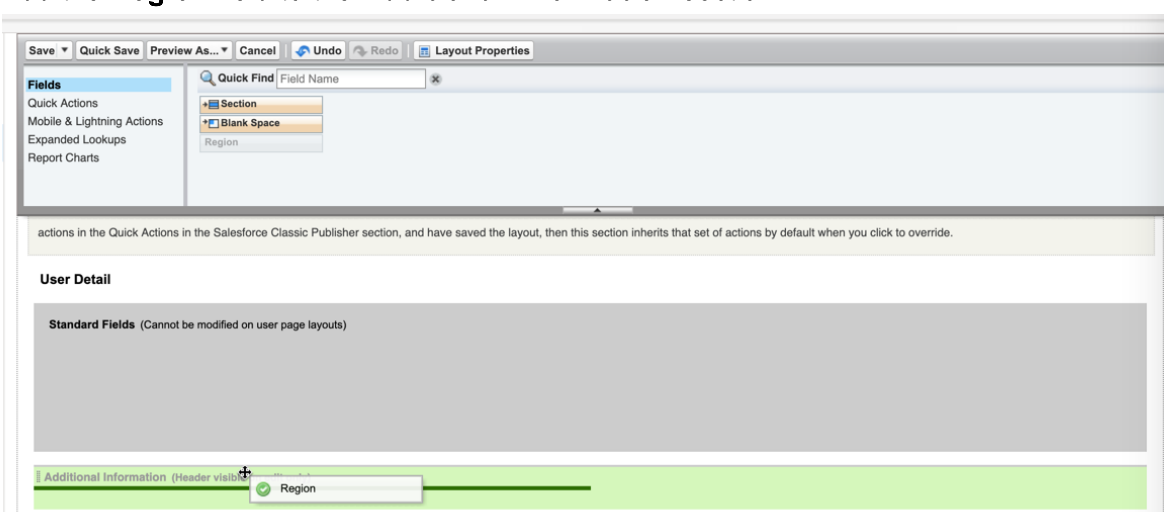
1. Access the **Object Manager** via **Setup** and search for the **Participant** object.
2. Once you click on the **Participant** object, access the **Page Layouts** section and click on **Participant** Layouts.
3. Drag the **Last Prize Win** field to any column of the Information section of the page layout.
4. Click **Save**.

Add the Region field to the User Page Layout

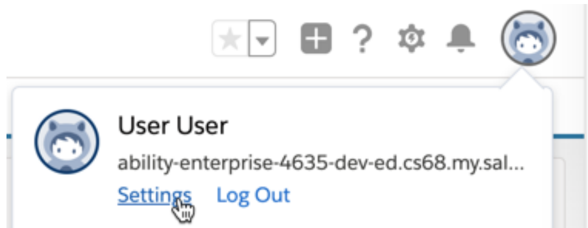
A User in Salesforce is managed as an Object, just like other Standard Objects like Account, Contacts, Opportunities etc and you can extend the user data model the same way you can extend other Standard Objects.

The package that was installed earlier had a 'Region' field for the User object. We are going to use this field to determine the region (West, Central or East) that the user belongs to. Let's add the user field to the User Page Layout.

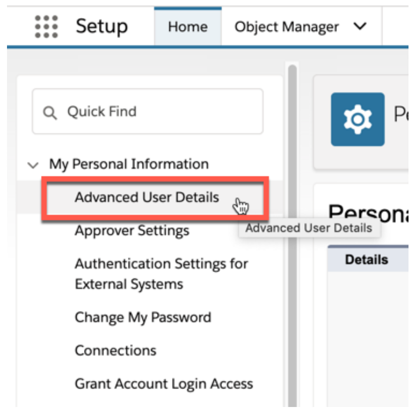
1. Access the **Object Manager** and search for the **User** object.
2. Click on the **User Page Layouts** section on the left side of the page and click **User Layout.**
3. Add the **Region** field to the **Additional Information** section.



4. Click **Save**.
5. Now let's update this field for your user profile. Click on the profile picture placeholder on the top right corner of the screen and click on **Settings**. This will take you to your personal user settings for multiple features across your Salesforce org.



6. On the window that opens up, click on **Advanced User Details.**

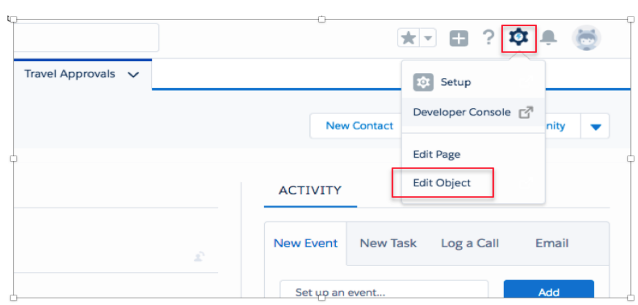


7. Click on **Edit** and look for the **Region** field.
8. Set the value of Region to **West** and click **Save**.

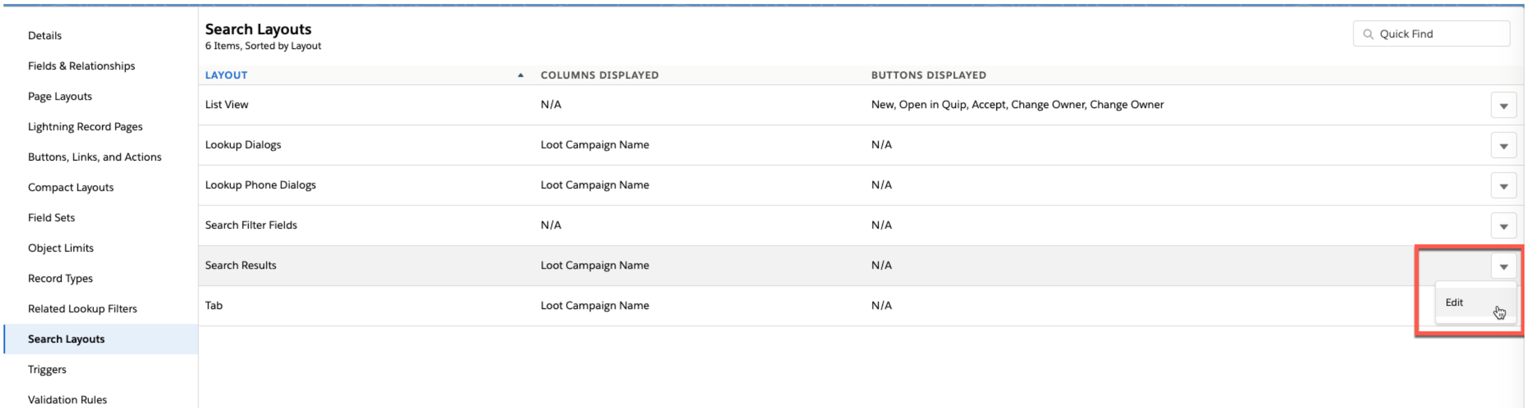
Add Fields to the Recently View list view

1. Navigate to the **Loot Administration** app and the **Loot Campaigns** tab. You can switch between different list views by selecting the current list view and selecting another from the dropdown list. You can pin a specific list view so that the same list view is pre-selected when a user navigates to that tab.

2. Let's add some columns to the **Recently Viewed** list view.
3. In top-right, click on gear icon and then **Edit Object**. This will load the object configuration page for the **Loot Campaign** object.

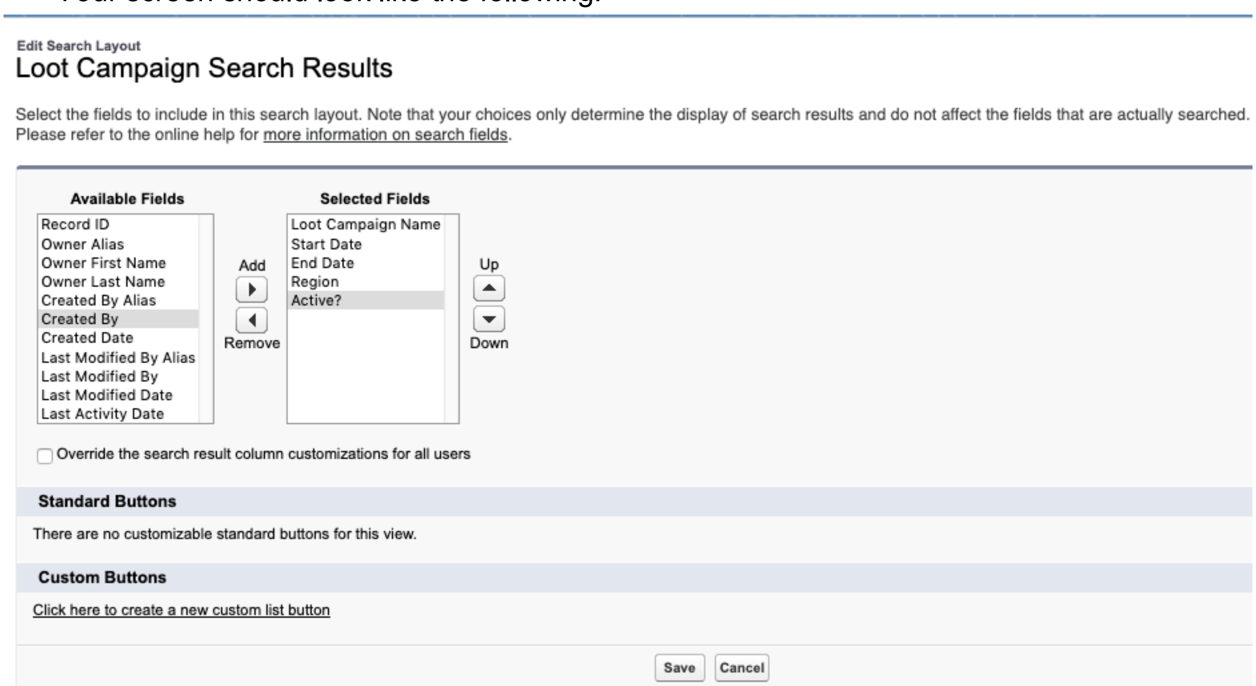


4. On left-hand side, click on the option **Search Layouts**. Click on the on the end of the **Search Results** row and select **Edit** from the drop-down.



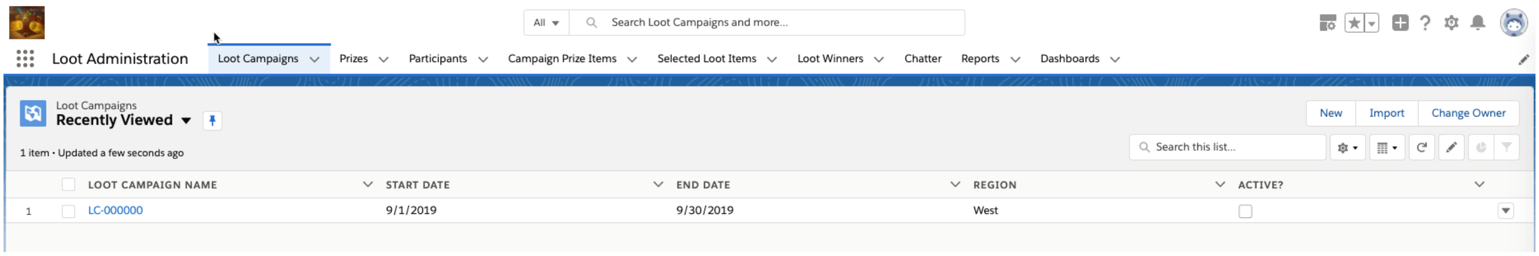
5. Let's now add the columns we want to show on the **Recently Viewed** list view. Select the following columns and using the arrows, move them from left-hand side to the right-hand side.
   - Start Date
   - End Date
   - Region
   - Active?

   Your screen should look like the following:



6. Click **Save** button.

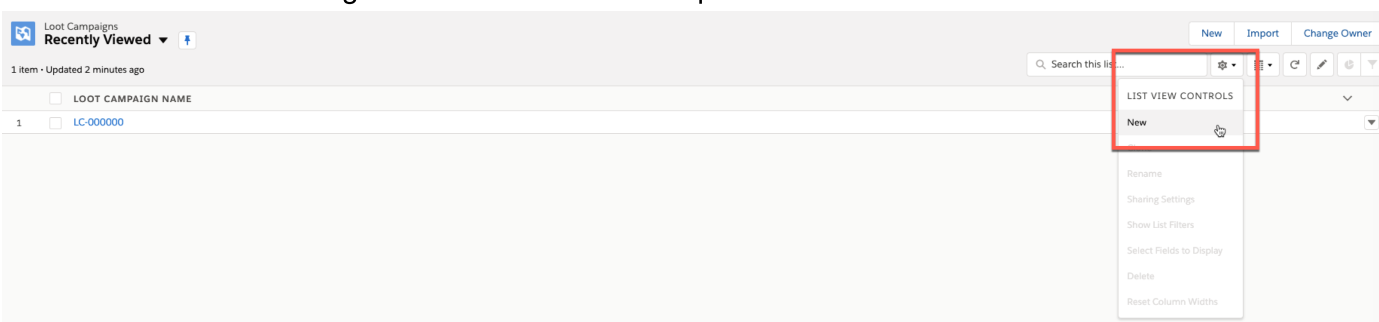
7. Navigate back to your **Loot Administration.** Note the **Recently Viewed** list view on the **Loot Campaigns** now have the columns we just added. It should look like the following.



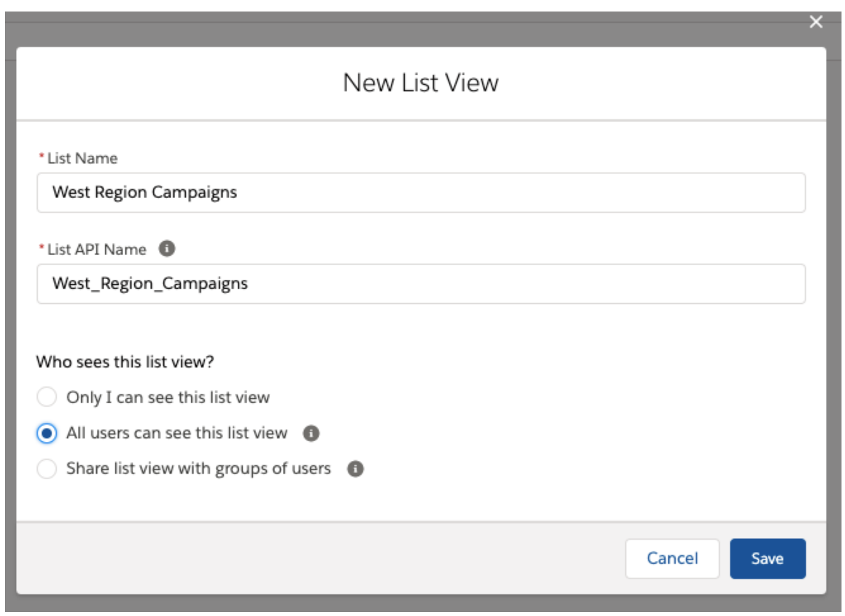
Create a Custom List View

You can also create a custom List View for your own needs. It can be private only to you or you can make it accessible to other users. Let's say we want to create a List View to show all Loot Campaigns for the West Region.

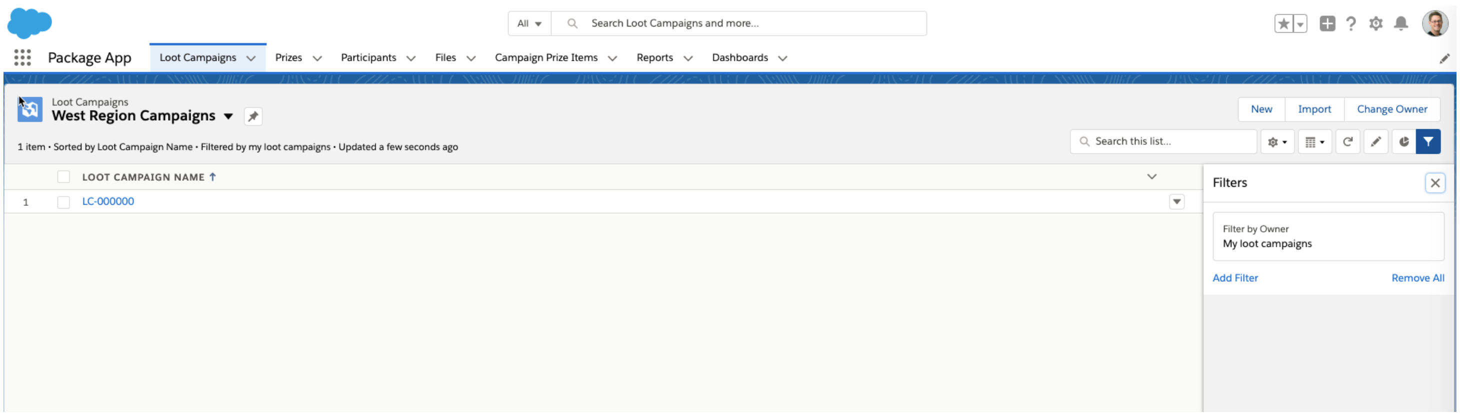
1. Click the List View gear icon and select **New** option.



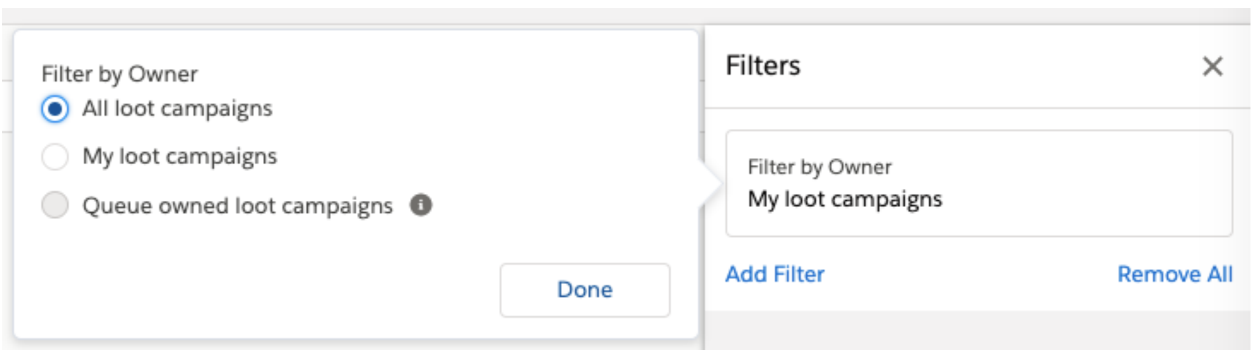
2. Name the new list view "**West Region Campaigns**" and make sure that **"All users of the system can see this list view"** is selected. Your configuration window should look like following. Click the **Save** button.



3. Your screen will now look like the following.



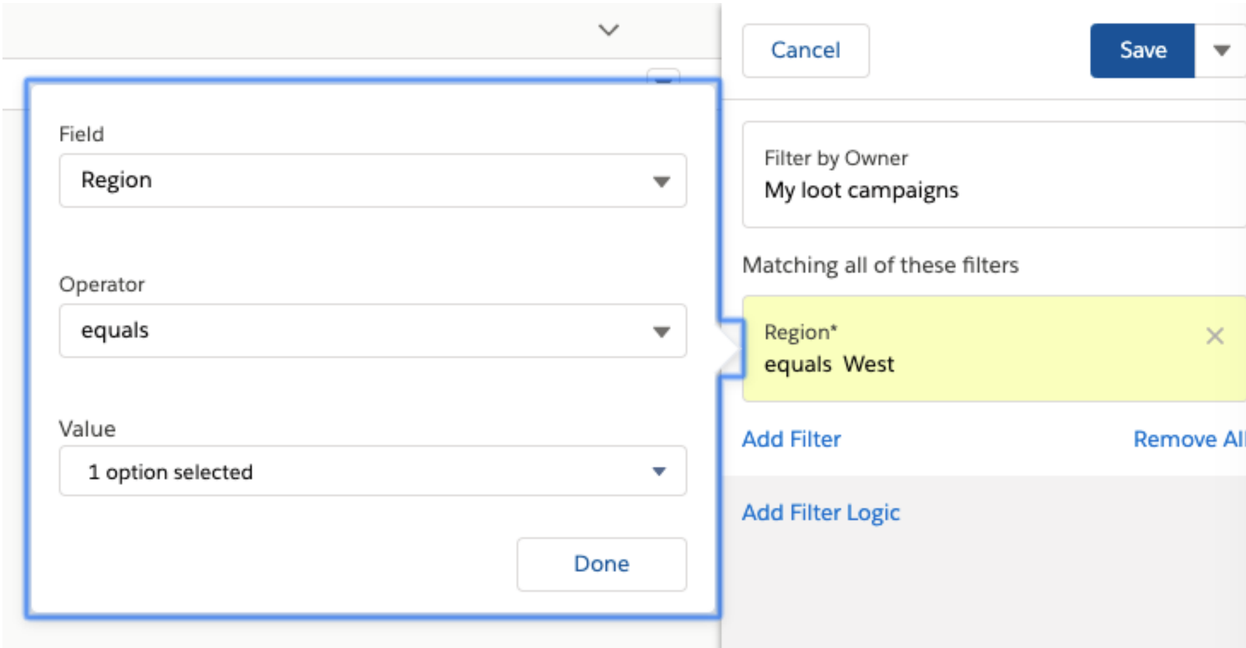
4. Let's change the '**Filter by Owner**' filter to look at requests logged by all users in our custom list view. Click on the '**Filter by Owner**' tile and select '**All loot campaigns'** and click '**Done**'.



5. Next let's add a filter to the list view to only show loot campaigns that are assigned to the West Region. On right-hand side of screen, click the **Add Filter** button.
   Select the following values for the filter:

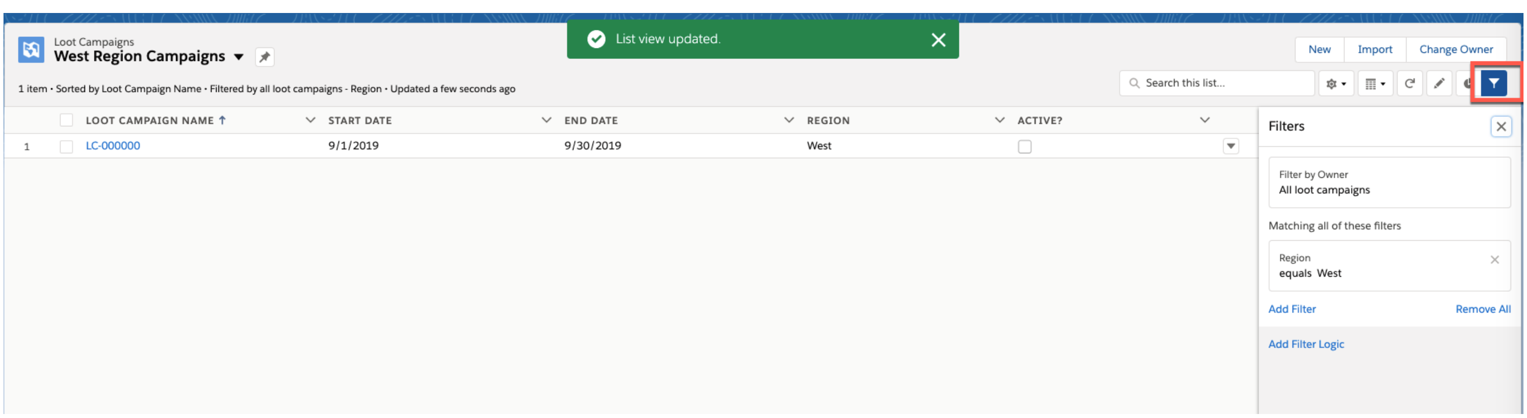
Parameter	Value
Field	Region
Operator	equals
Value	West

Your screen should look like the following. Click the **Done** button.



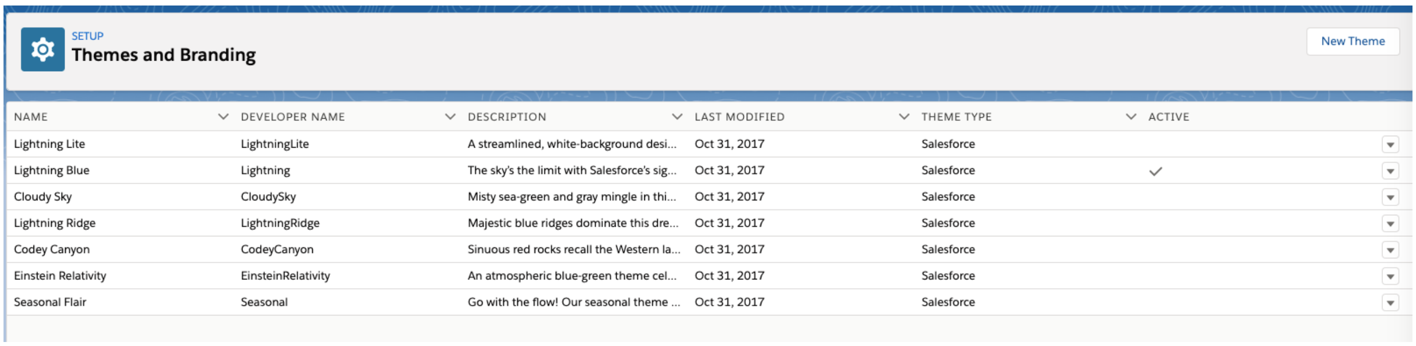
6. Click the **Save** button when filters are complete.
7. As we did earlier, let's add some columns now to this list view. We'll add the same columns as we did earlier. Click the **List View** gear icon on right and then select **Select Fields to Display** from drop-down.
   - Start Date
   - End Date
   - Region
   - Active?

Click **Save** button. Your screen should now look like following. You can hide the List View or hide filters by click on the funnel icon on the right-hand side.

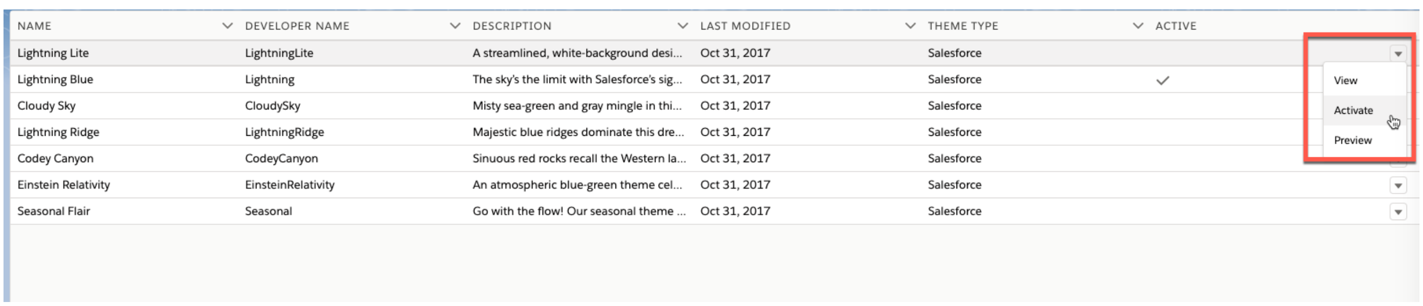


Theming and Branding Your Salesforce Org

1. From Setup, enter Themes and Branding in the Quick Find box, then select **Themes and Branding**.
2. You will see a list of out of the box Salesforce themes. From here you can view, preview, and activate an existing theme, or click **New Theme** to create your own.



3. Activate the **Lightning Lite** theme by clicking the downward facing arrow and clicking **Activate**.



4. This theme will mainly change the background of your Salesforce org pages to a clear/white background. You can also explore creating a new them by clicking the **New Theme** button.

Keep these considerations in mind when working with themes:

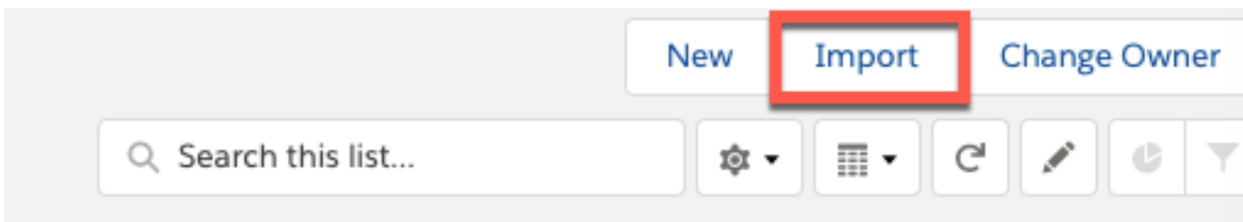
- Only one theme can be active at a time, and a theme applies to your entire org.
- By default, orgs use the built-in Lightning Blue theme.
- You can create up to 300 custom themes, but you can't modify or clone the built-in themes provided by Salesforce.
- Themes don't apply to Salesforce Classic or to mobile.
- Even if you haven't selected the option to override themes in the App Manager, your app's brand image and color always override the Lightning Lite and Lightning Blue themes.

Lab 4 – Import and Create Data

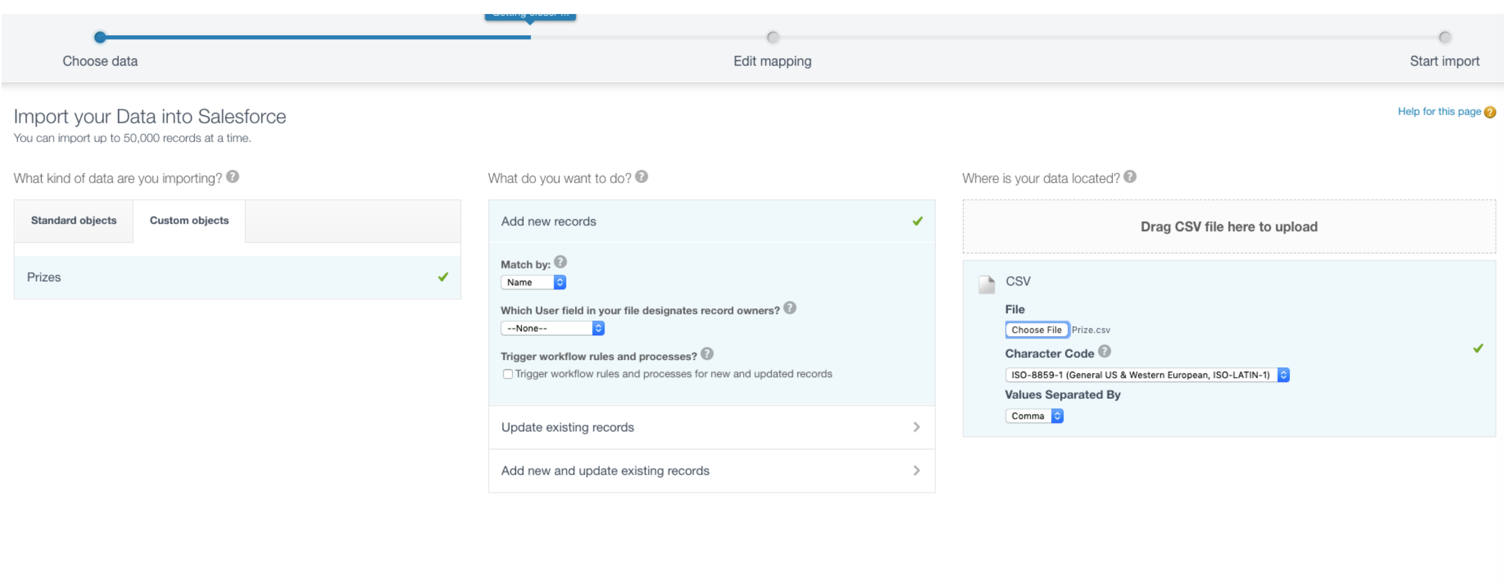
Import Data for the Prize Object

Now that we have created the data model and configure the UI, let’s use the Data Import Wizard to easily import load data in CSV files.

1. Access the **Prizes** tab in the Loot Administration app and click the **Import** button on the top right corner.

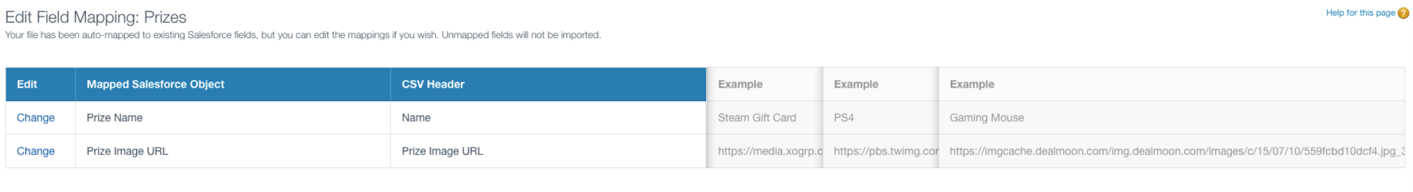


2. The Data Import Wizard screen that opens up already has the Prize object pre-selected because it was accessed from the Prizes tab. Click on Prizes.
3. Click on **Add New Records** and select **Name** for the **Match By** dropdown. Leave all other options as the default selection.
4. Drag the CSV file named ‘**Prize.csv**’ in the **Salesforce Workshop** folder onto the section ‘Where is your Data Located?’. Alternatively, click **Choose File** and select the file from your file system.

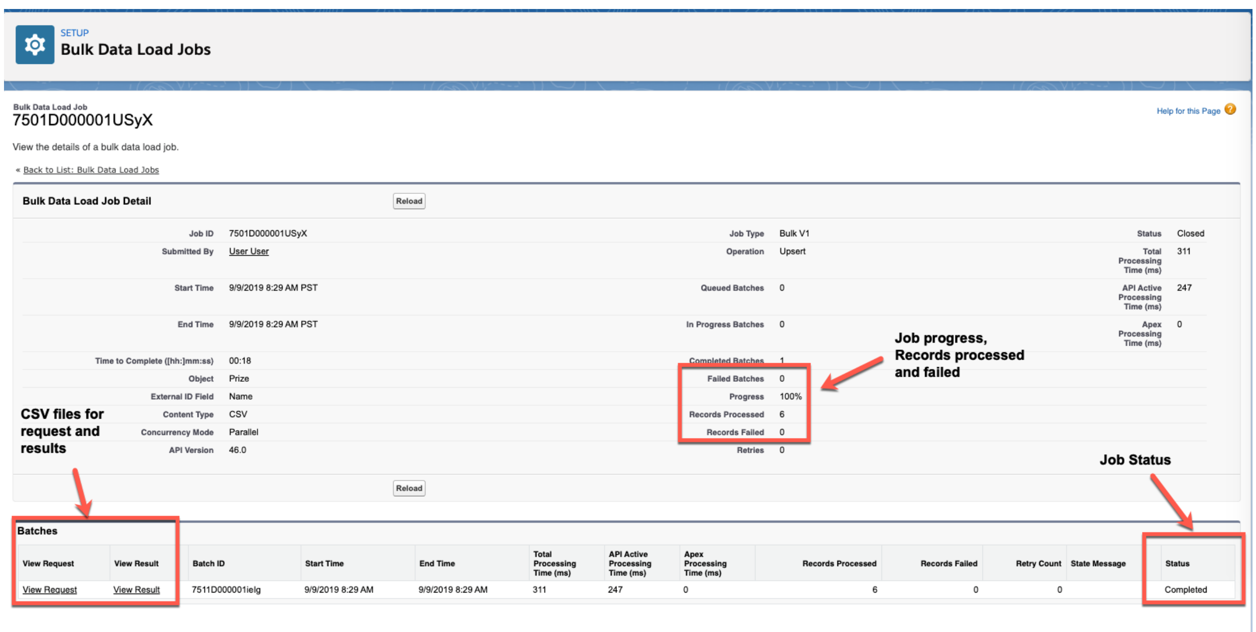


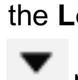
5. Click **Next.**

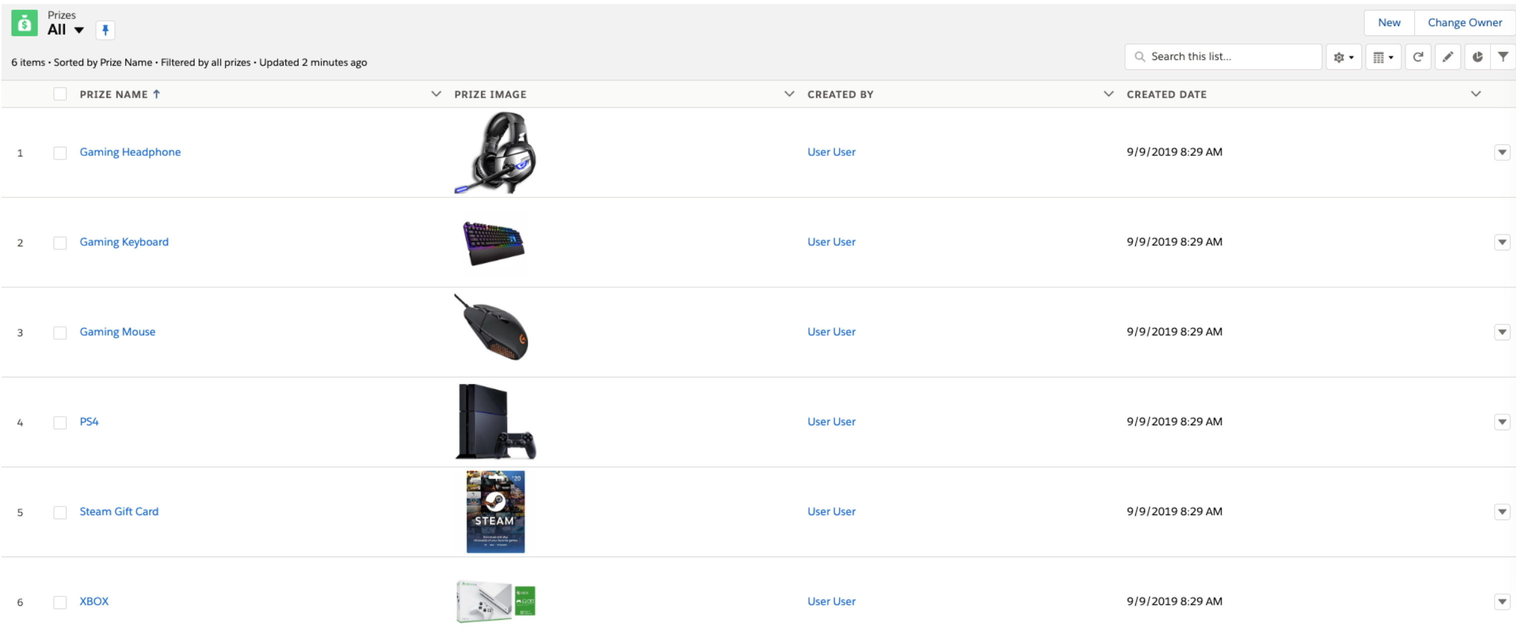
6. The name of column headers in the CSV file matches the names of the field labels of the Prize object. In this scenario, the Data Import Wizard automatically maps the field of the Prize Object to the column headers found in the CSV. If you like, you can manually change these mappings.



7. Click **Next** and click **Start Import** on the next screen. On the success message popup that appears click on **OK**. The data is loaded as a background batch job and you will be redirected to the status of that batch job. These are very small files and the records should be uploaded instantly. You will see a similar screen.



8. Navigate to the **Prizes** tab in the **Loot Administration** tab. Switch to the **All** list view by clicking the downward arrow  next to the **Recently Viewed** list view. Pin this list view by clicking the pin icon  next to the name of the list view. You should see 6 Prize records in the **All** list view.

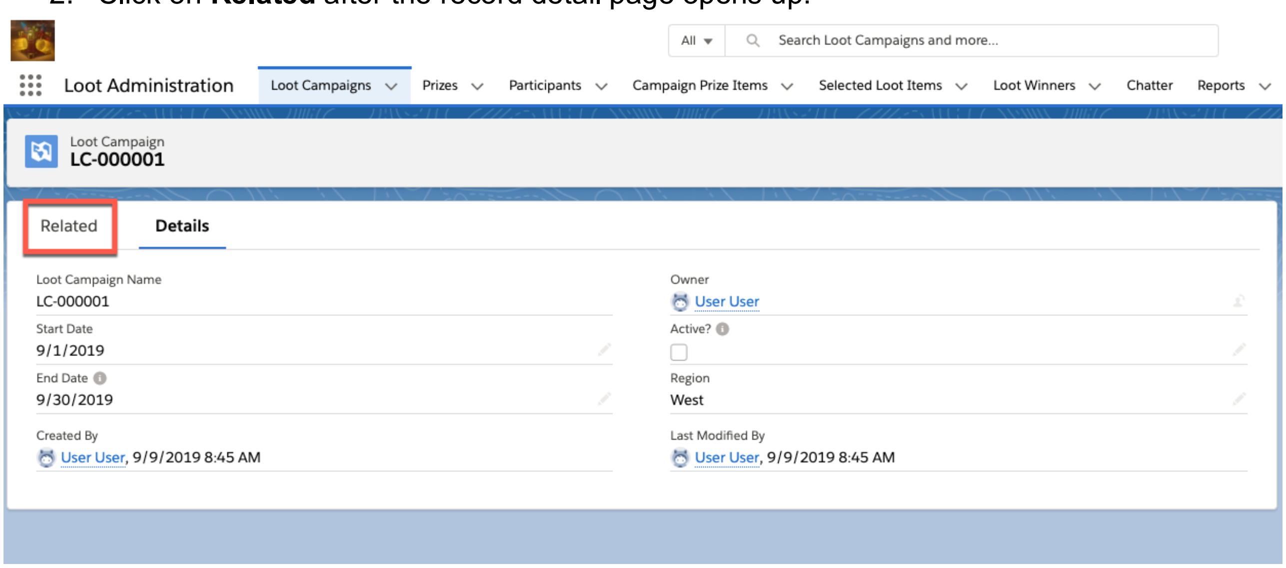


Create Campaign Prize Items

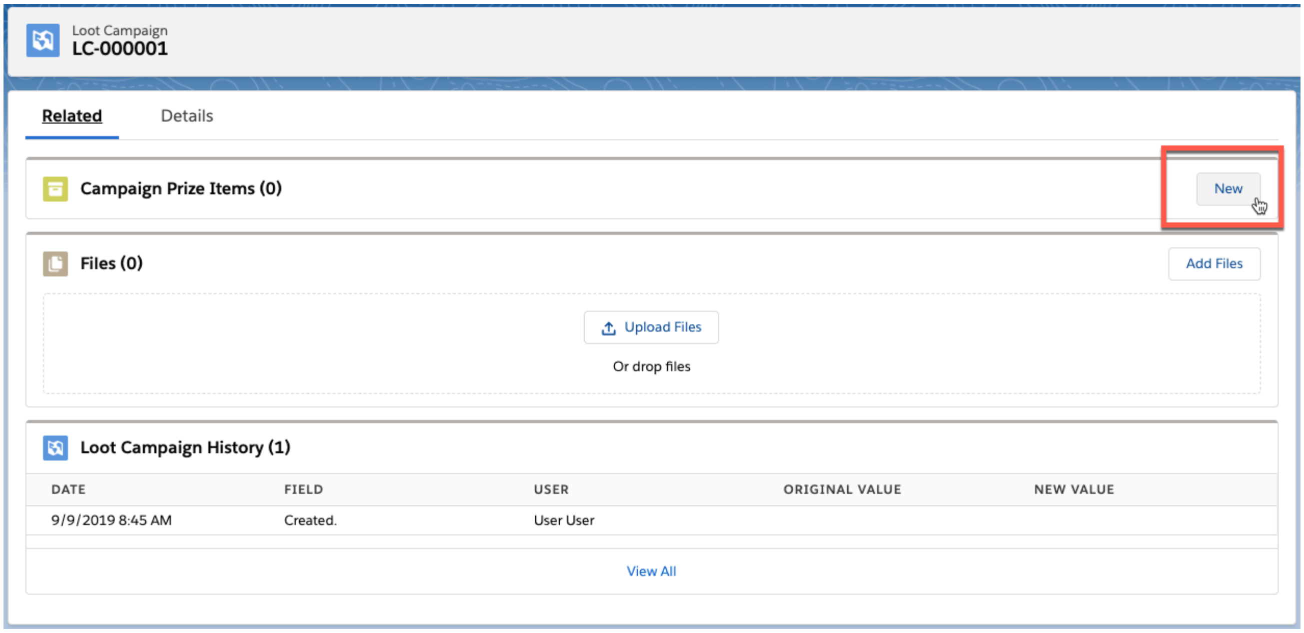
Users have multiple ways they can create records in Salesforce. Let's explore some of the options by creating some Campaign Prize Items for the Loot Campaign record we just created.

Create Records from a Related List

1. Access the **Loot Campaigns** tab and click on loot campaign record you created in the previous exercise.
2. Click on **Related** after the record detail page opens up.

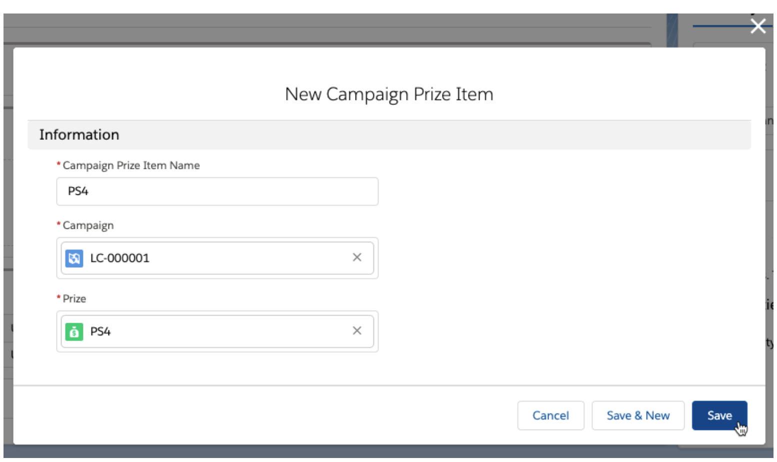


3. Click on the **New** button on the Campaign Prize Items related list.



4. Since we are creating this Campaign Prize Item record from the context of a Loot Campaign record, you will notice that the Campaign value on the record creation form is already populated. Enter the following values for the new record and click **Save.**

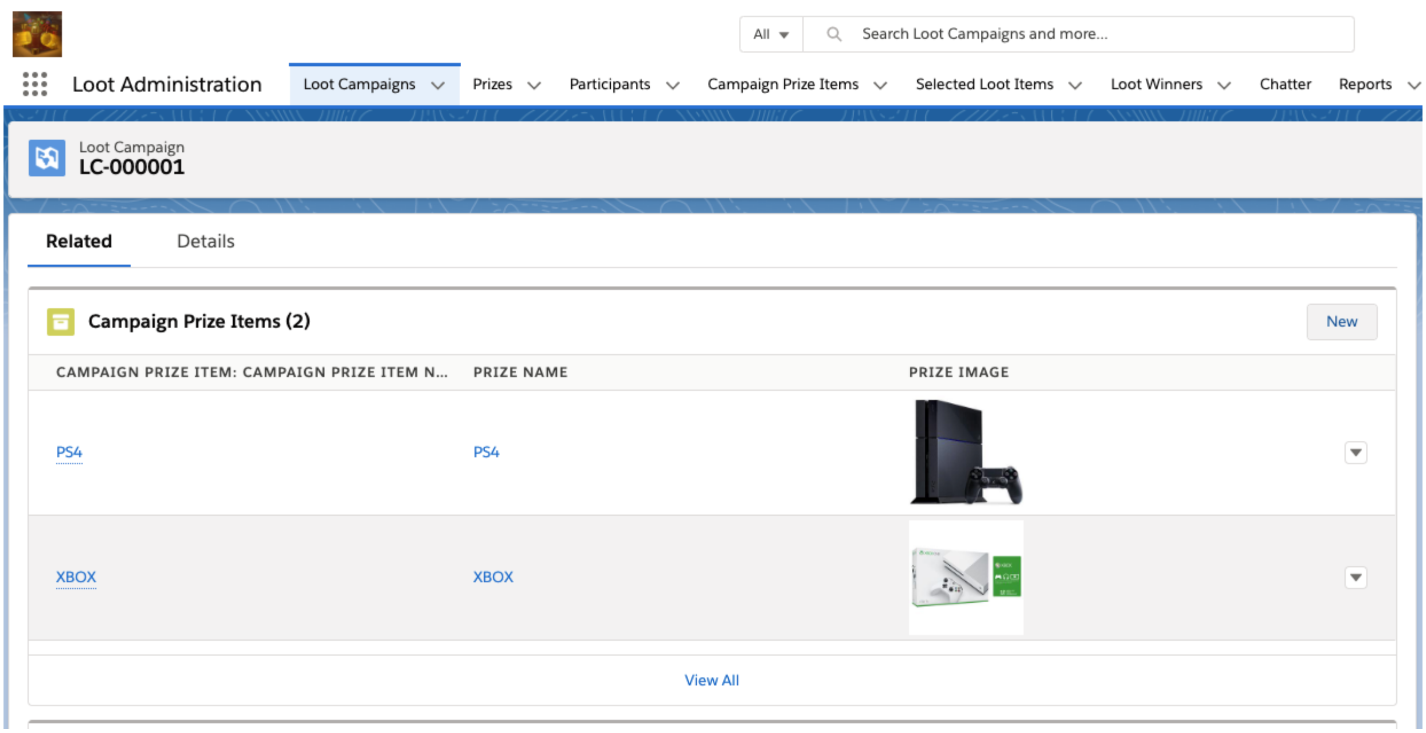
Field	Value
Campaign Prize Item Name	PS4
Prize	PS4 (Lookup fields have type ahead search behavior. Type PS4 in the field. Note that you might have to scroll the modal to see the results.)



5. Create another Campaign Prize Item record with the following values.

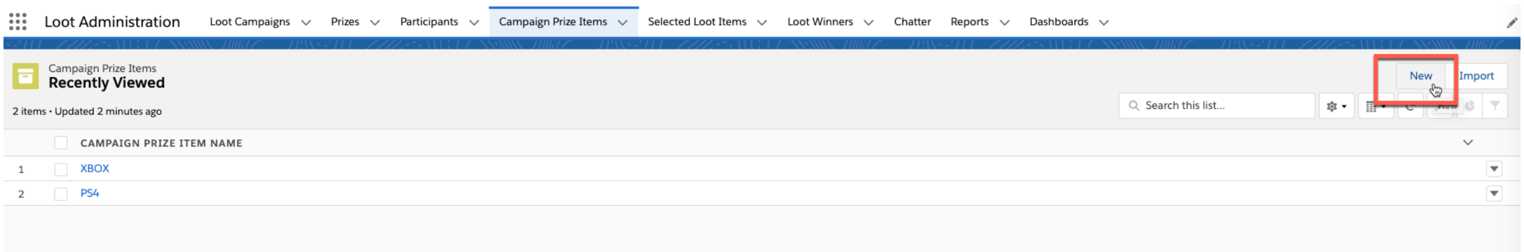
Field	Value
Campaign Prize Item Name	XBOX
Prize	XBOX (Lookup fields have type ahead search behavior. Type PS4 in the field. Note that you might have to scroll the modal to see the results.)

6. Once both records are created, you should see record information in the Campaign Prize Items related list.



Create Records from a Tab's List View

1. Another way we can create a record is from a list view located on an object's dedicated tab. Access the **Campaign Prize Items** tab in the **Loot Administration** app.
2. You will see the two recently created Campaign Prize Items listed in the **Recently Viewed** list view. Click on the **New** button on the top right corner of the list view.



3. Notice that none of the fields on the record creation form are populated now because the Campaign Prize Item is not being created from within the context of a campaign or a prize. Enter the following values for the record and click **Save**.

Field	Value
Campaign Prize Item Name	Gaming Mouse
Campaign	Name of the Campaign record in the format LC-00000X. Select the Campaign record from the type ahead search results.
Prize	Gaming Mouse

4. Create another Campaign Prize Item record.

Field	Value
Campaign Prize Item Name	Gaming Headphone
Campaign	Name of the Campaign record in the format LC-00000X. Select the Campaign record from the type ahead search results.
Prize	Gaming Headphone

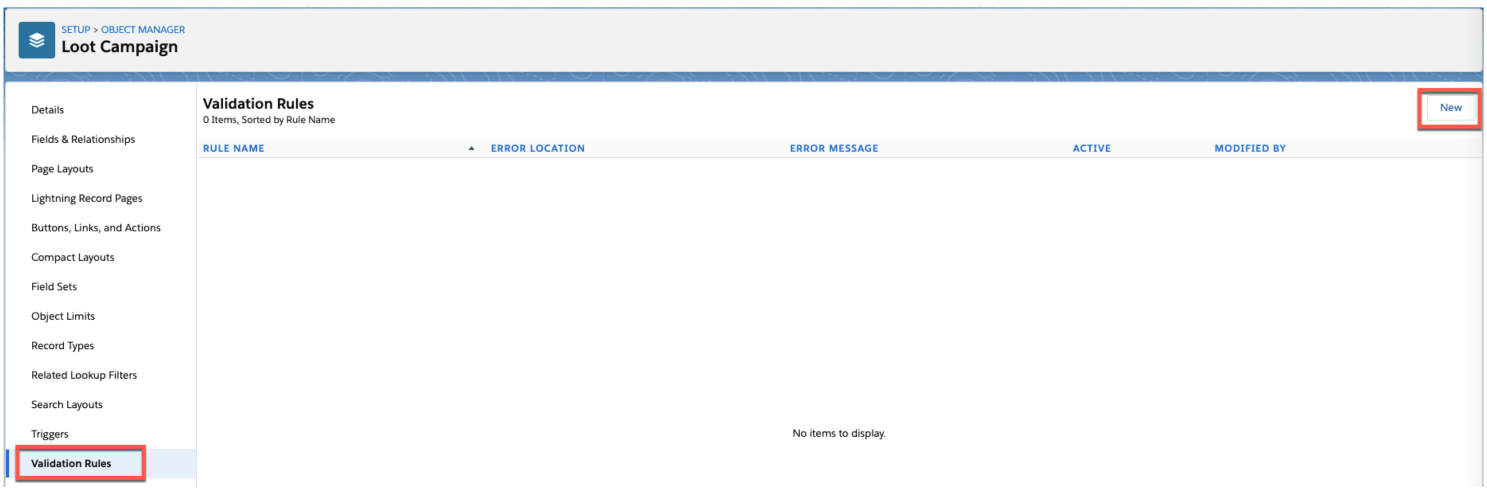
5. You will be redirected to the detail page for the newly created Campaign Prize Item record. Navigate to the Loot Campaign record by clicking on the Campaign field and confirm that all the Campaign Prize Items are listed in the Campaign Prize Item related list.

Lab 5 – Data Validation and Process Automation

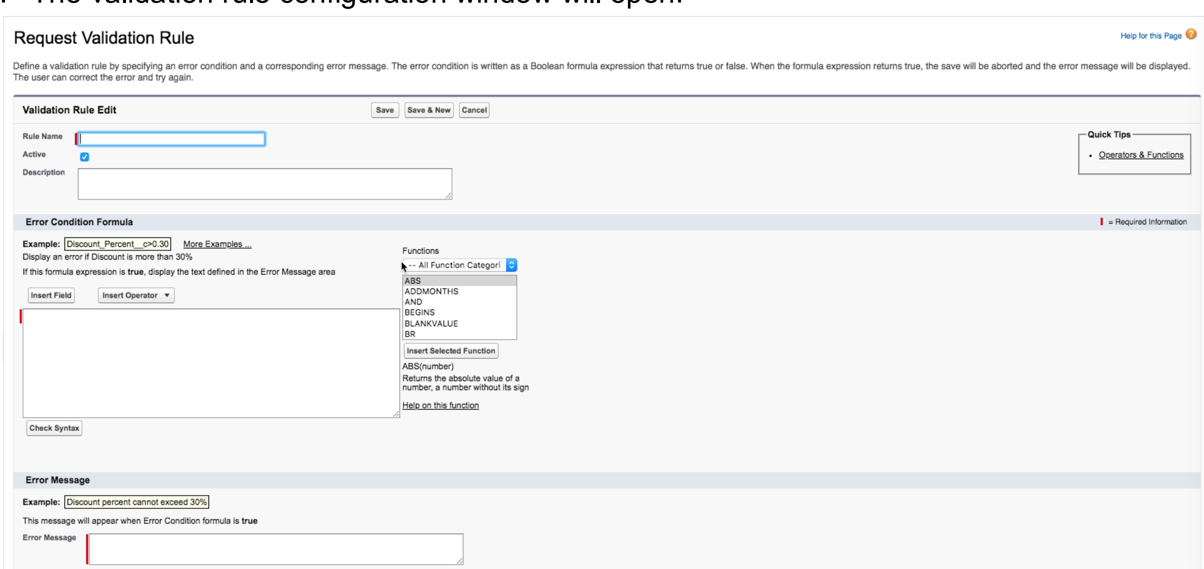
Create a Validation Rule for the Loot Campaign Object

Let's create a validation rule to enforce that the end date for a Loot Campaign must always be > the start date.

1. Access Setup by clicking the gear icon in upper-right and select **Setup**.
2. Next, we need to open the configuration screen for the Platform object. Click on **Object Manager** and access the **Loot Campaign** object.
3. You should now be on the configuration page for the Request object. Click on the **Validation Rules** option on left-hand side. Click on the **New** button.



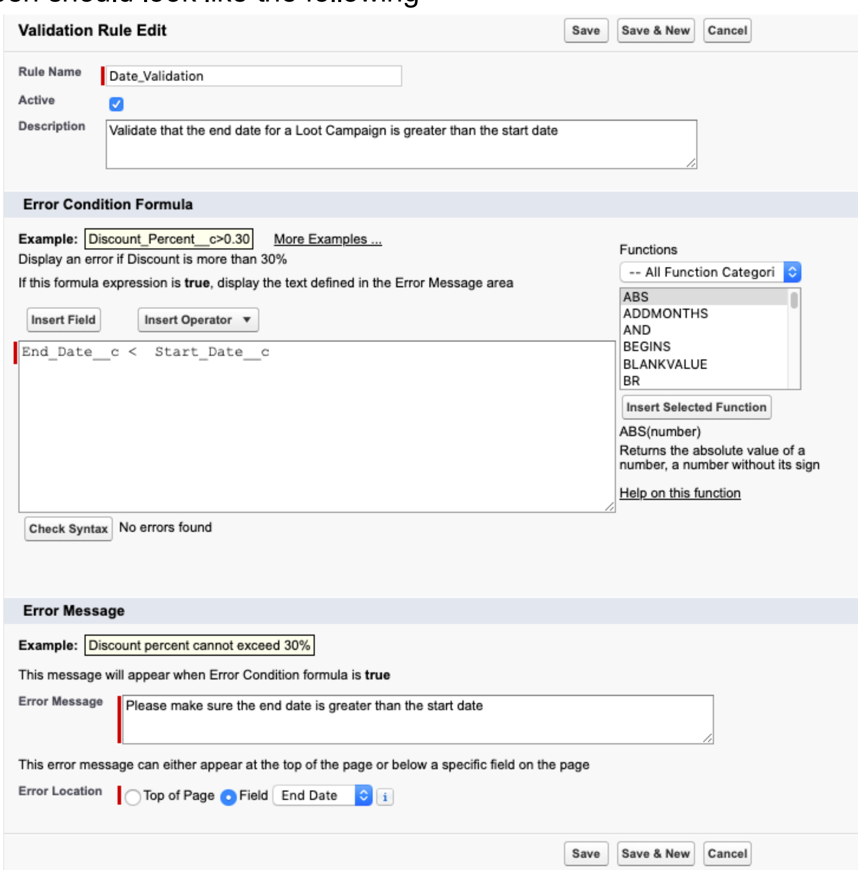
4. The validation rule configuration window will open.



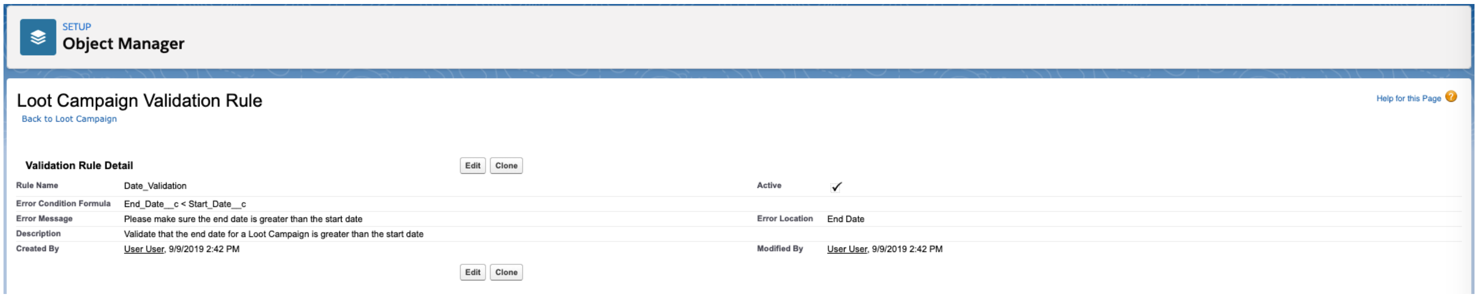
5. Create a new validation rule with the following parameters -

Parameter	Value
Rule Name	Date_Validation
Active	*Make sure to keep this selected/checked.*
Description	Validate that the end date for a Loot Campaign is greater than the start date
Condition Formula	End_Date__c < Start_Date__c **NOTE:** When writing a validation rule, your condition formula should return "true" for your false condition.
Error Message	Please make sure the end date is greater than the start date
Error Location	Select Field and pick "End Date" as the location for the error

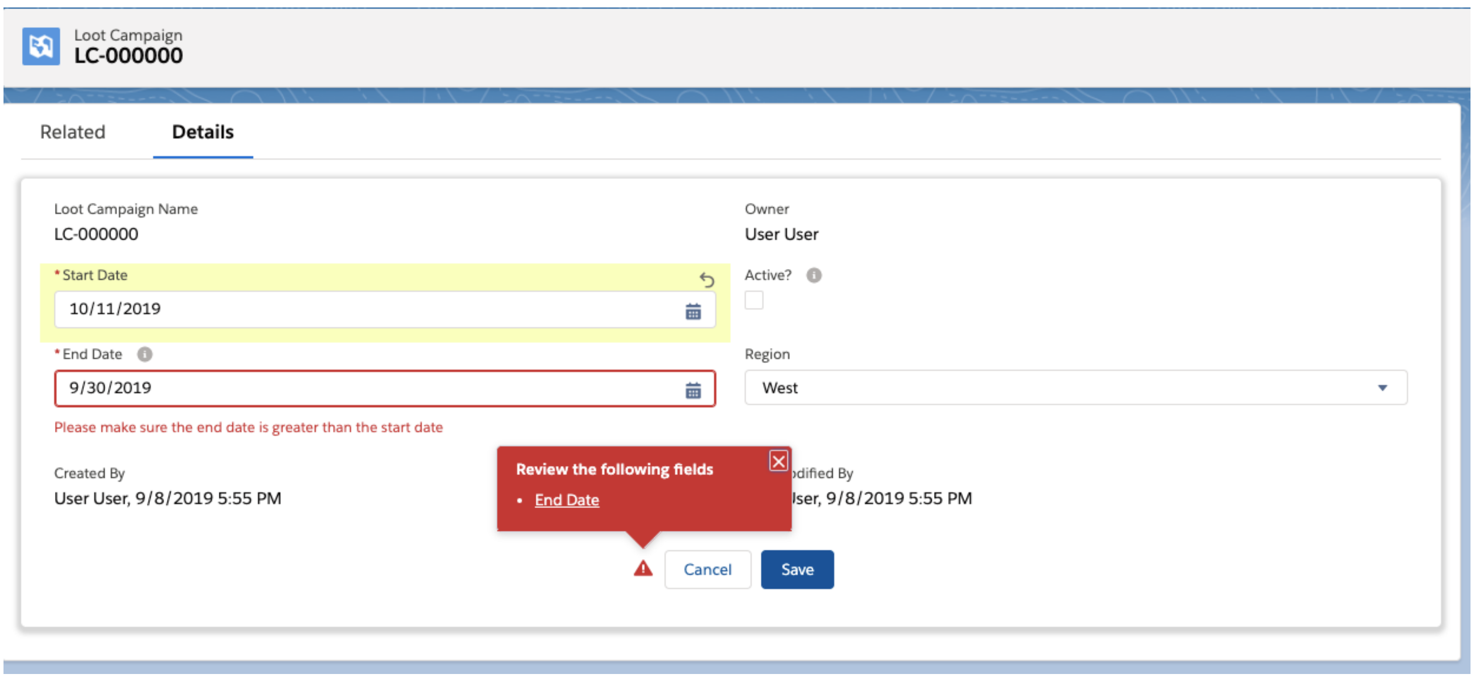
Your screen should look like the following -



6. Click the **Save** button. The following window will display.



7. Try your validation rule by updating an existing Loot Campaign record or creating a new one.



Create a Process Builder Process to send Campaign Activation Emails

Salesforce provides workflow capabilities that provide a declarative, drag-n-drop design environment to build our business process logic. The Salesforce Lightning Process Builder allows you to automate the following capabilities:

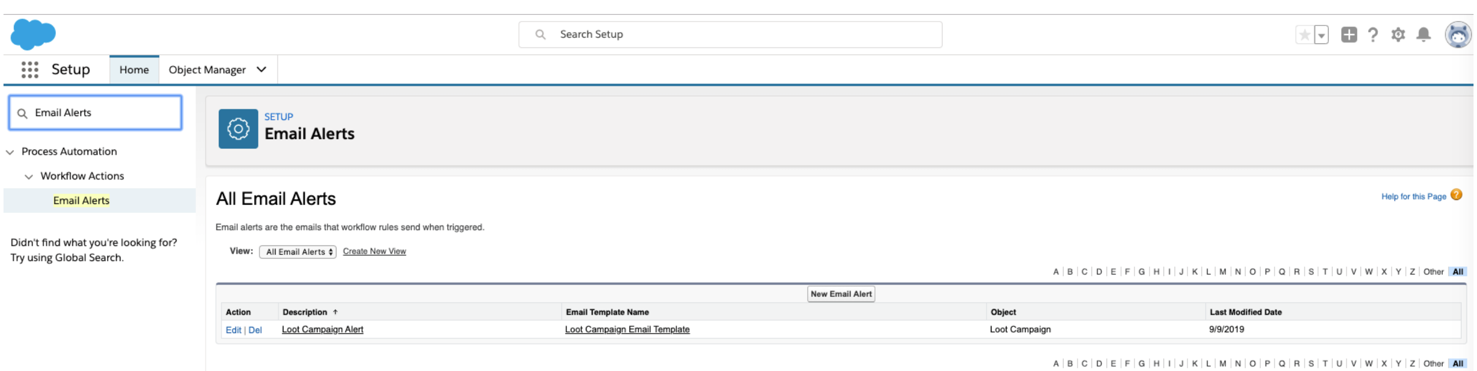
- creating or update a record based on record changes or Platform Events
- sending email alerts
- invoke a sub-process
- post to Chatter to alert followers of a record or to record some event
- submit record for approval
- invoke Apex code for highly customized logic implemented in a programming language
- invoke Open API based external services

In this exercise we will create a process to send an email to a target audience when a campaign is activated with details of the campaign.

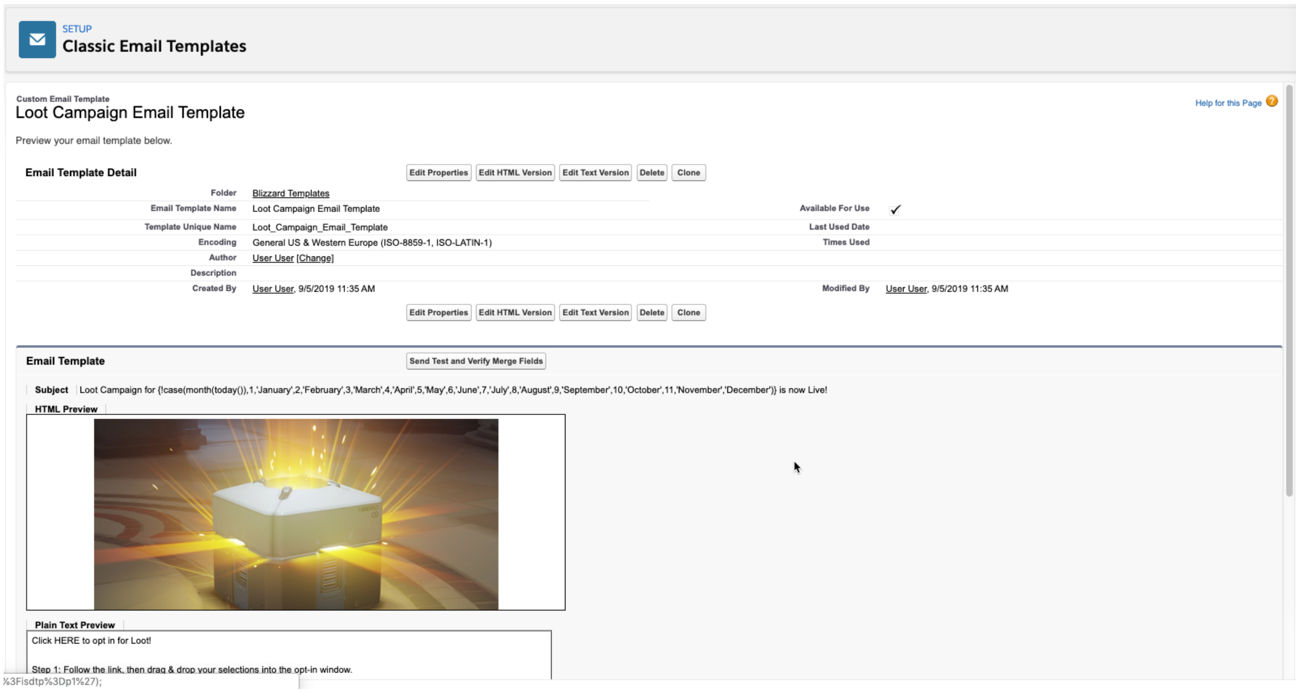
Email Alerts and Email Templates

While you can send one-off emails to customers, partners and colleagues from multiple places within the Salesforce UI, sending an email alert in Salesforce involves creating an **Email Alert** which in turn requires an email template. The package you installed earlier contained the **Loot Campaign Alert** and the **Loot Campaign Email Template**. Let's take a look.

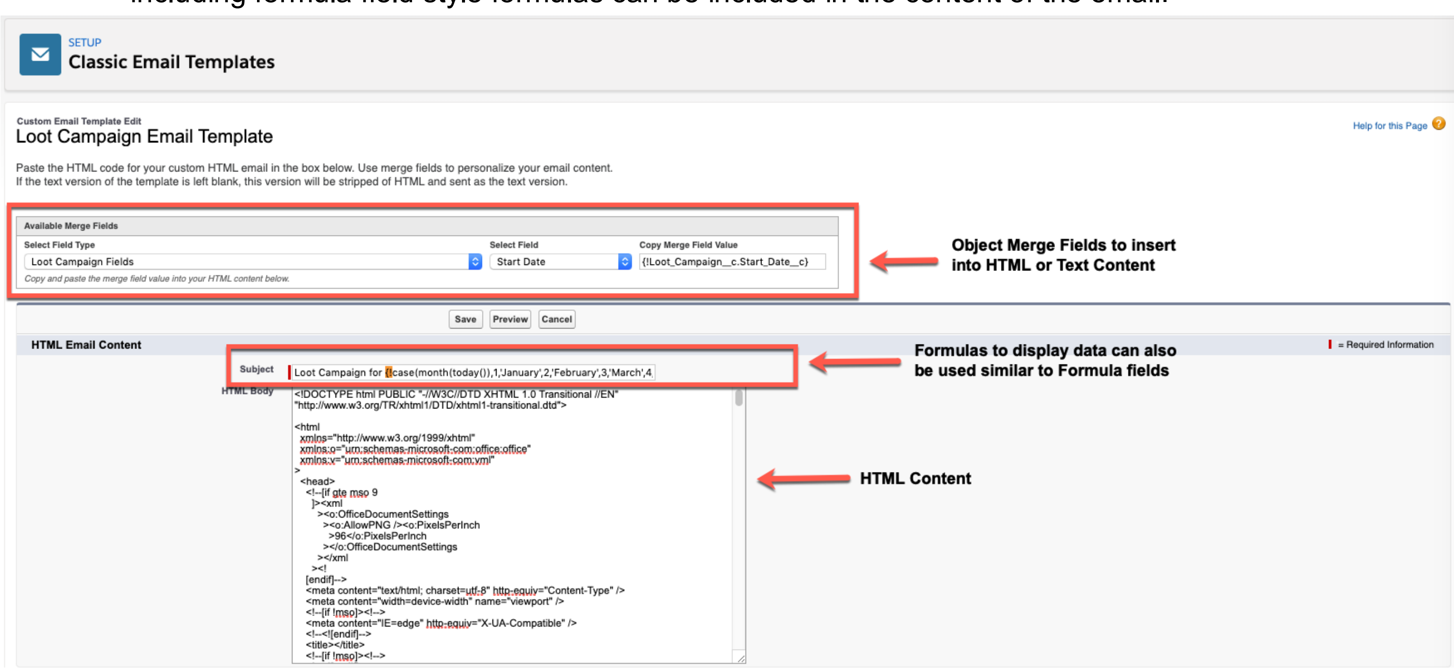
1. Access the **Setup** menu and type **Email Alerts** in the Quick Find box and click Email Alerts. You will see a screen with instructional information about Email Alerts. Click the **Do not show this message again** checbox and click **Continue.** The next screen displays the list of available Email Alerts, including the **Loot Campaign Alert.** You will also notice the **Loot Campaign Email Template** is also listed next to the email alert's name.



2. Let's check out the Email Template. Click on the **Loot Campaign Email Template.** You should see a screen similar to this.



3. Salesforce email templates can have HTML and/or Text versions. This email template is primarily an HTML template and has a corresponding Text Version that gets created automatically based off the text in the HTML version. The Text Version can however be edited and be different from the HTML version.
4. Click the **Edit HTML Version** button to view the HTML content that makes up the email template. The most important thing to note is that data from multiple Salesforce objects, including formula field style formulas can be included in the content of the email.



5. Search for https://login.salesforce.com in the email body and replace that with the following https://<my-domain-name>/lightning/n/Loot . Your domain name can be found in the browser URL. Here is a sample URL - https://ability-enterprise-4635-dev-ed.lightning.force.com/lightning/n/Loot. Here ability-enterprise-4635-dev-ed.lightning.force.com is the domain name.

6. Click **Preview**. A preview of the Email's content opens up in a new tab. If you like click the **HERE** link and confirm it opens up the Loot App. Go back to the Email Template editor and click **Save**.

Click HERE to opt in for Loot!

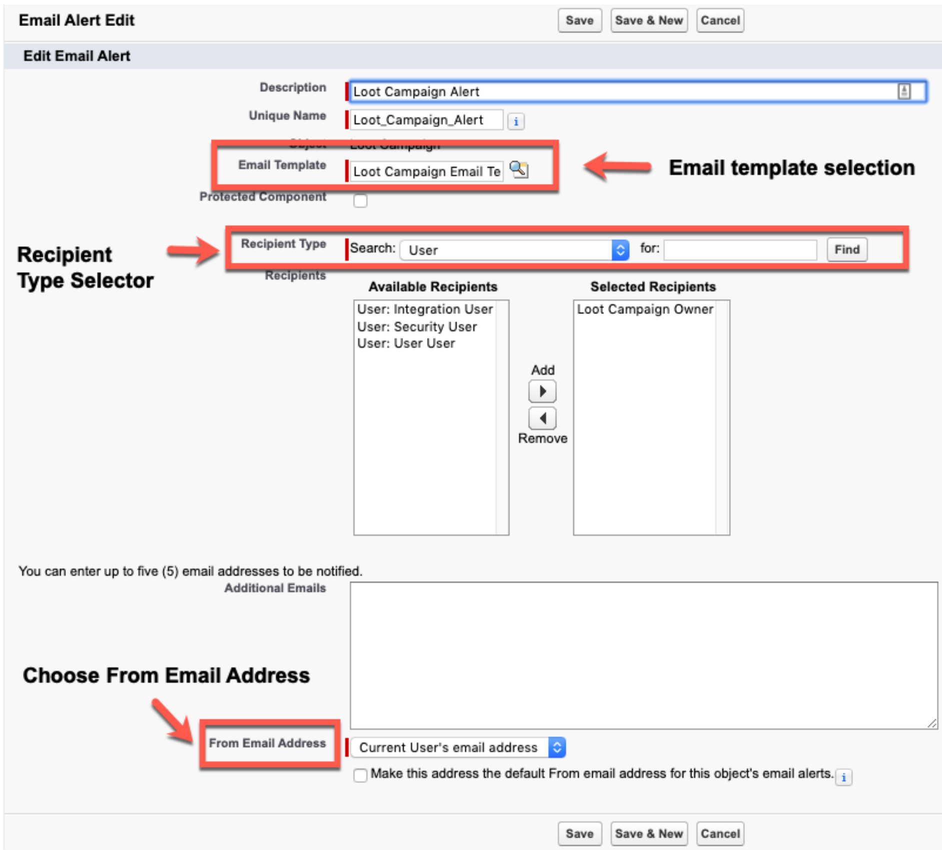
Step 1: Follow the link, then drag & drop your selections into the opt-in window.
Step 2: Rank your selections by preference.
Step 3: SAVE (For the love of Elune, save your changes!)

Winners will be randomly selected and notified via email.

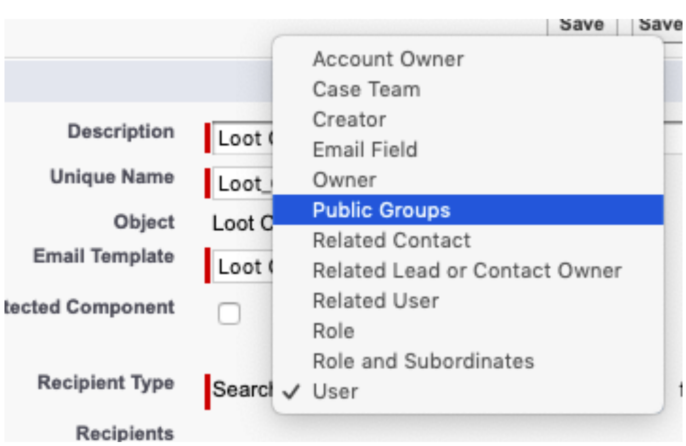
Prizes can be picked up from the LOOT DEPOT during listed operating hours.
If you have questions, please email xyz@blizzard.com

7. Navigate back to the list of **Email Alerts** via the Quick Find search box. Click on the **Loot Campaign Alert**.

8. Click on **Edit**. You will see the screen on the following page.



9. Click on the **Recipient Type** dropdown and notice the options available for email recipients. One of the types is a **Public Group**. A group consists of a set of users. A group can contain individual users, other groups, or the users in a particular role or territory. Everyone in the organization can use public groups. For example, an administrator can create a group for an employee carpool program. All employees can then use this group to share records about the program. Find more information about Groups here – [What Is a Group?]

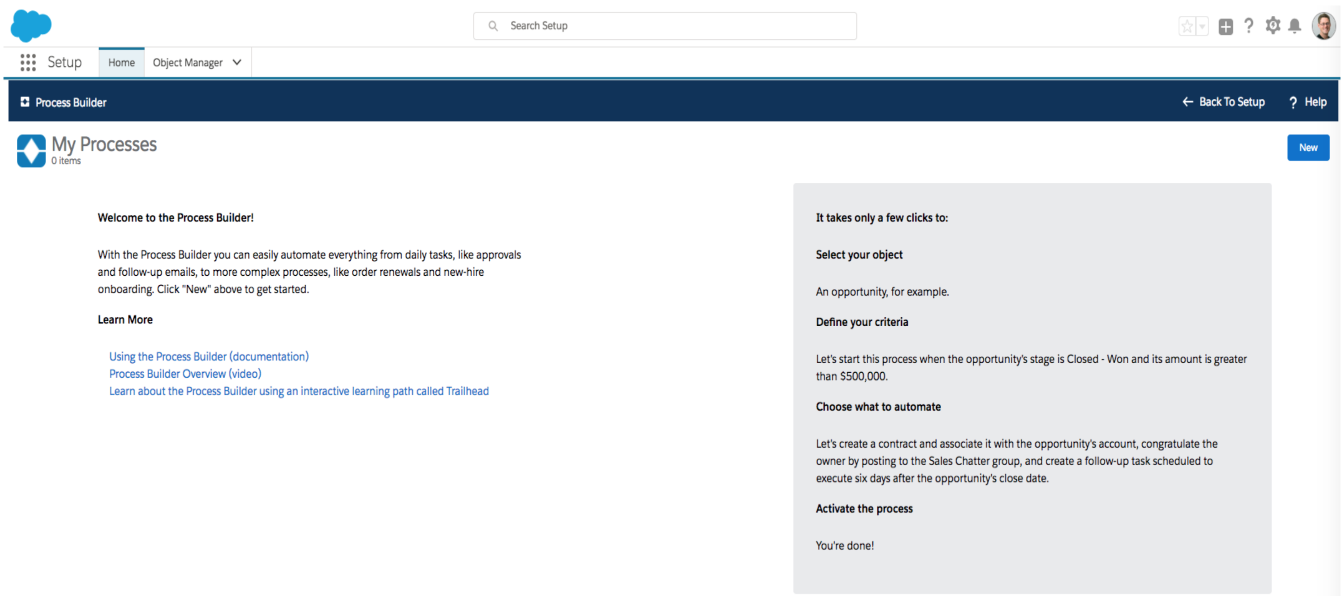


10. Think about how you could use Groups in the scenario.
11. Click **Save.**

Create a Process to send Loot Activation Email

Let's create a process that uses the **Email Alert** process builder action to send the activation email.

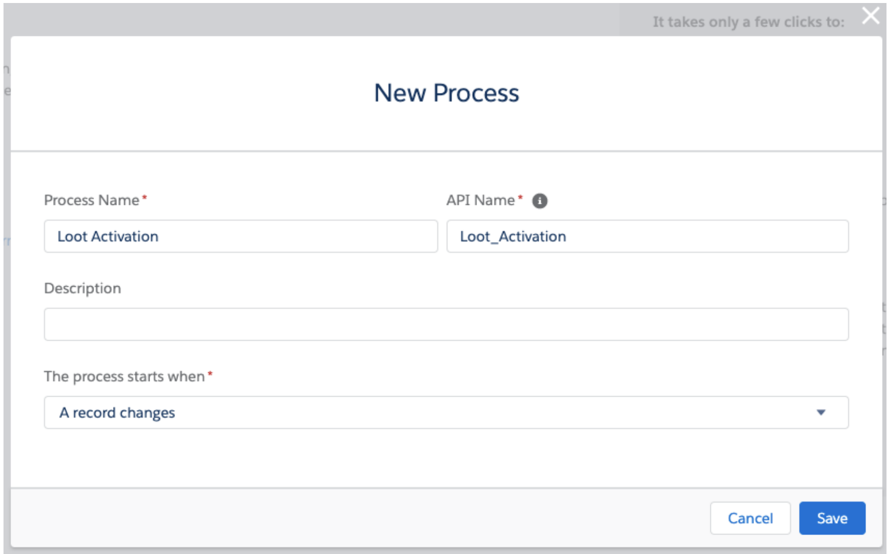
1. Access **Setup** menu and navigate to the **Home** tab.
2. On left-hand side, select **Process Automation > Process Builder** (or use the Quick Find and search on "Process"). You should see a window like the following:



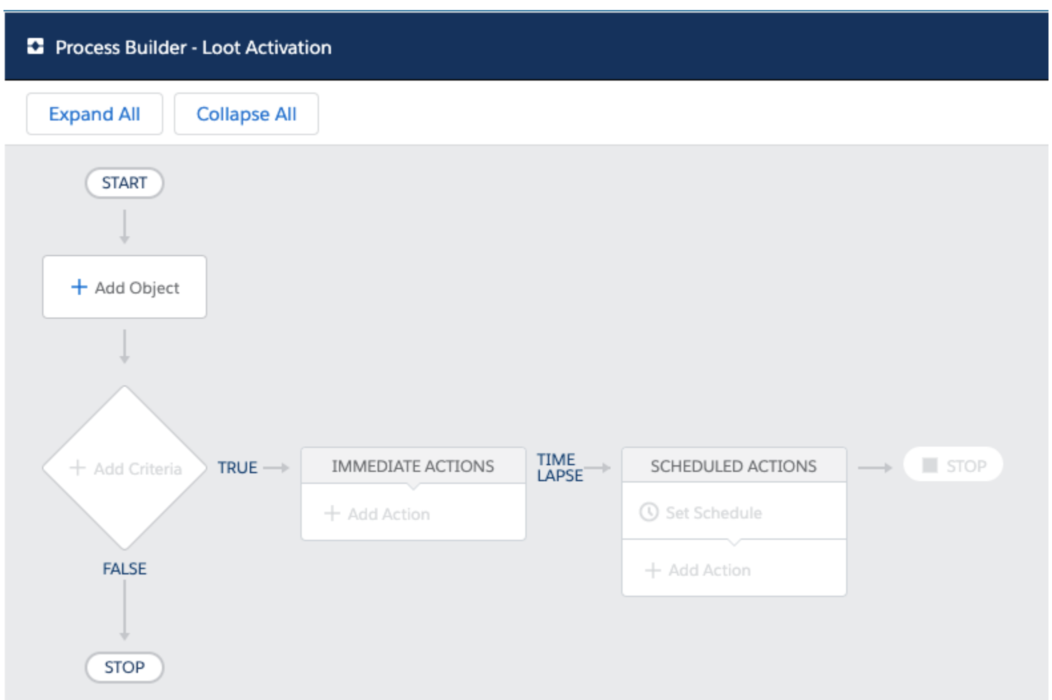
3. Click the **New** button in upper right.
4. Create a new Process with the following parameters.

Parameter	**Value**
Process Name	Loot Activation
API Name	Loot_Activation (this will automatically get set when you tab out of the Process Name field)
Description	*Leave blank*
The process starts when	A record changes

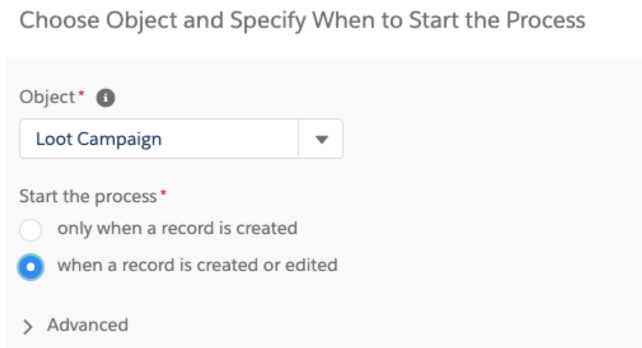
Your screen should look like following:



5. Click Save.
6. You will now be presented with the Process Builder design window as shown below.



7. First click on the **Add Object** box. This is where we configure which object we want this process rule to run when a record is created or modified. A window will show on right-hand side like following:



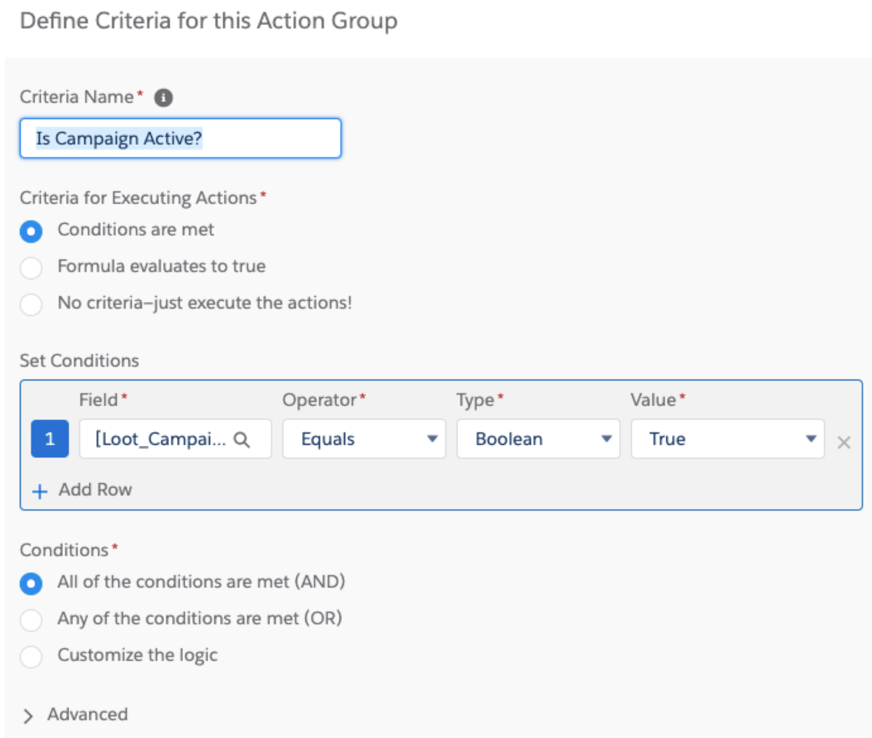
8. Set the following parameters

Parameter	Value
Find an object…	Loot Campaign
Start the process	Choose “when a record is created or edited” option
Advanced	*Do not change*

9. Click Save button
10. Next click on the **Add Criteria** icon on the process designer.
11. You will have a pop-up window where you configure your criteria when your processing logic will execute. Configure the window with following options:

Parameter	Value
Criteria Name	Is Campaign Active?
Criteria for Executing Actions	Conditions are met
Set Conditions	***Create a rule:*** [Loot_Campaign__c.Active__c] Equals [Boolean] [True]
Conditions	All of the conditions are met (AND)
Advanced	*Do not change*

Your window should look like the following

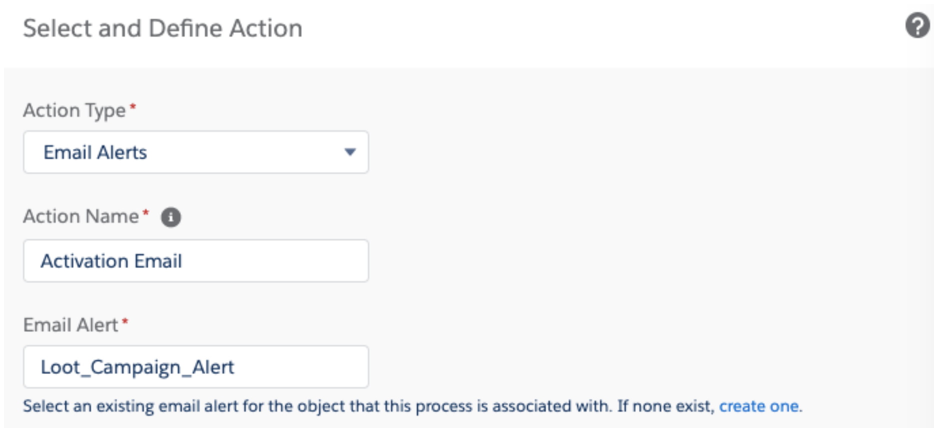


12. Click **Save** button.
13. Click on the **Add Action** link in the IMMEDIATE ACTIONS section to the right of the “Is Campaign Active?” decision box.

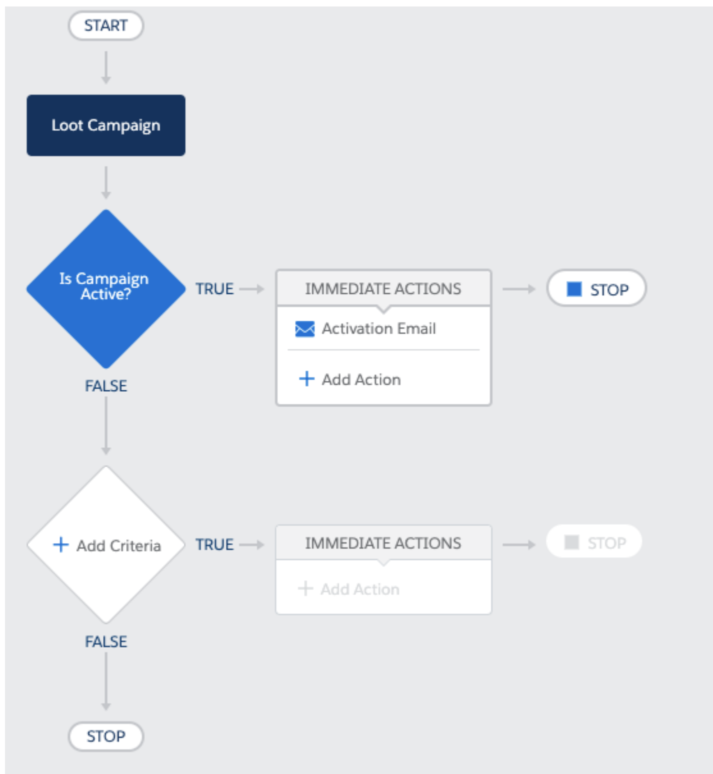
14. In the pop-up configuration window, set the following parameters:

Parameter	Value
Action Type	Email Alerts
Action Name	Activation Email
Email Alert	Loot_Campaign_Alert (this field has typeahead search)

Your window should look like the following:



15. Click **Save** button.
16. You have now configured a business process that will create a task for an in progress request. Your process will look like following.

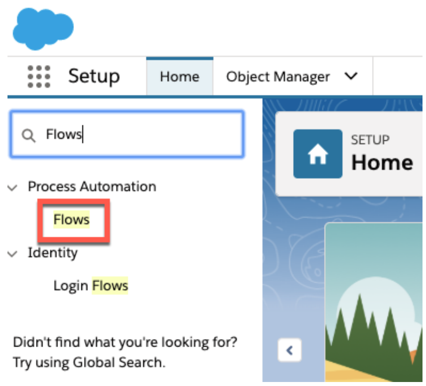


17. One last step is needed for this process. Click the **Activate** button in upper-right. Click **Confirm** on the pop-up window.
18. Let's test the process. Navigate to the Loot Campaign Record and edit the Loot Campaign record you created earlier so that the **'Active?'** checkbox is checked. If everything was configured right you should be receiving an email related to your Salesforce user account right about now.
19. Also go checkout the **Loot** app. What do you see?

Update the Get Campaign Winner Flow

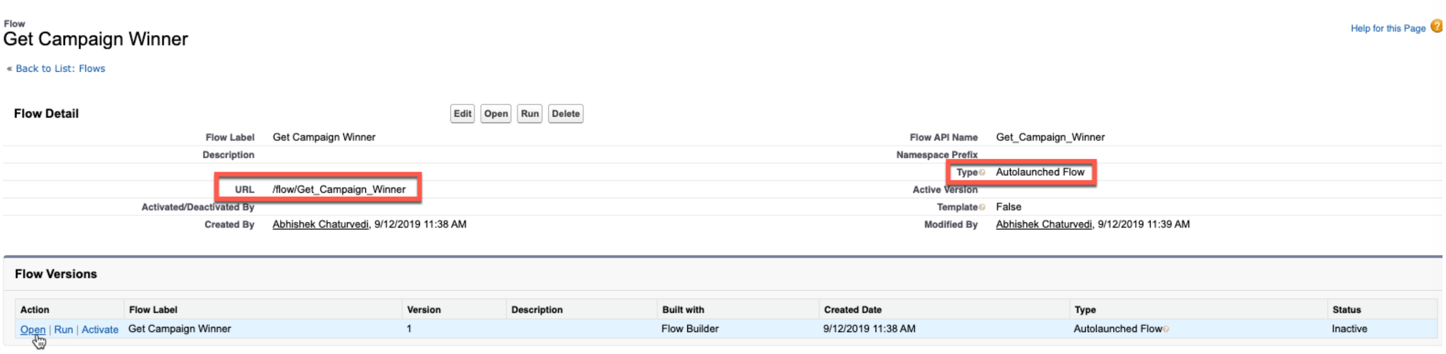
The package that you installed earlier has an incomplete and inactive flow that will help us draw a random winner for the Loot Campaign. Please note that this isn't based on the algorithm or process used by Blizzard today. The idea of this exercise is to help you familiarize with the Flow Builder tool.

1. Navigate to **Setup** and search for **Flows** in the **Quick Find** box.



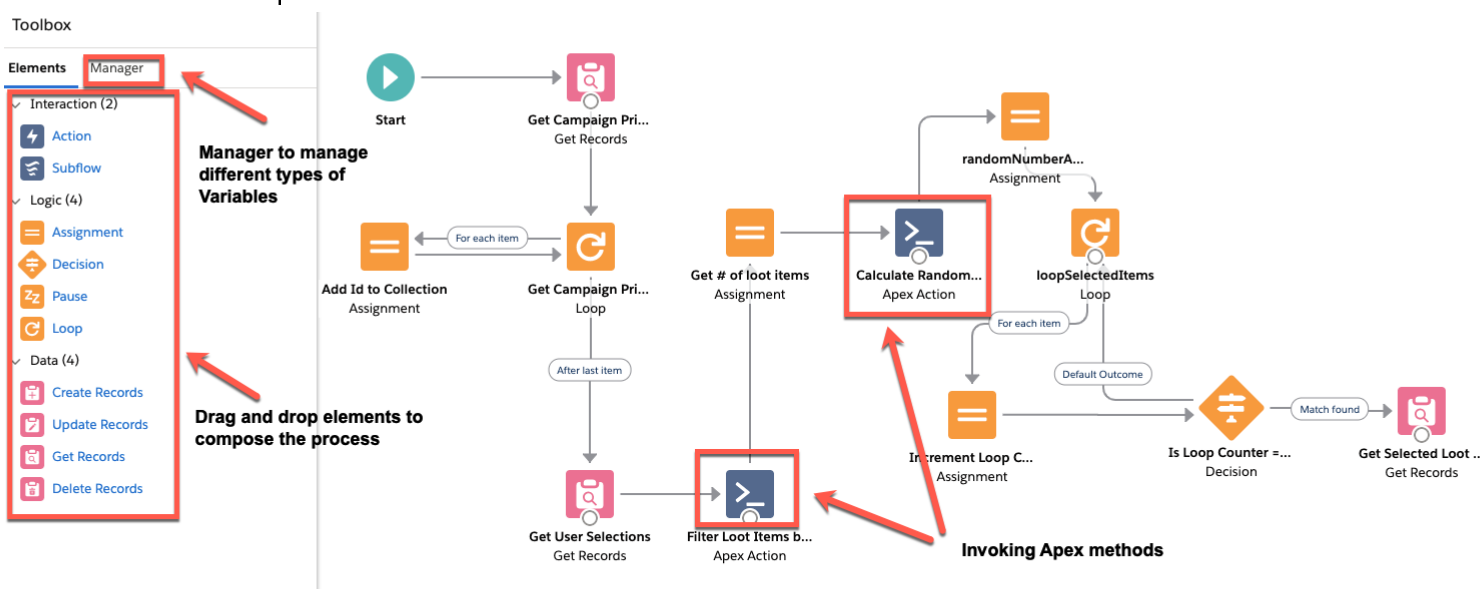
2. Click on **Get Campaign Winner**.

3. You will see the details of the Flow. A flow can have multiple versions. Only one version of a flow can be active at a time. Note the **Type** property of the flow. This is an Autolaunched Flow, which means that it has no visual components and runs as a background process. Also note the **URL** property of the flow. This property can be used to invoke the flow from other components in Salesforce.
4. Click **Open** next to the Flow Label.

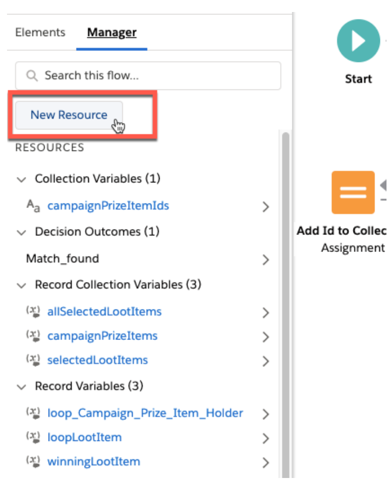


5. Clicking on Open will redirect you to the Flow Builder screen. Take a few minutes to observe the components of the Flow.
    - The flow will work in the context of a Loot Campaign. It will receive the record Id of a Loot Campaign record.
    - We use the Loot Campaign's Id to retrieve the Campaign Prize Item's associated with the Loot Campaign.
    - Once we have a list of Loot Campaign Prize Items, we get a list of Selected Loot Items filtered by the list of Campaign Prize Items. Since the list is dynamic and Flows don't have an equivalent of a SQL 'IN' clause that can operate with a dynamic list, we are taking the help of Apex code to filter the loot items.
    - Once we have a list of eligible loot items, we use Flows system variables to get the size of the list and again utilize some Apex to generate a random number. Based on the random number, we select the Selected Loot Item.

    In this exercise you will be adding components to create a Loot Winner Object and update the Participant record's Last Prize Win date field.

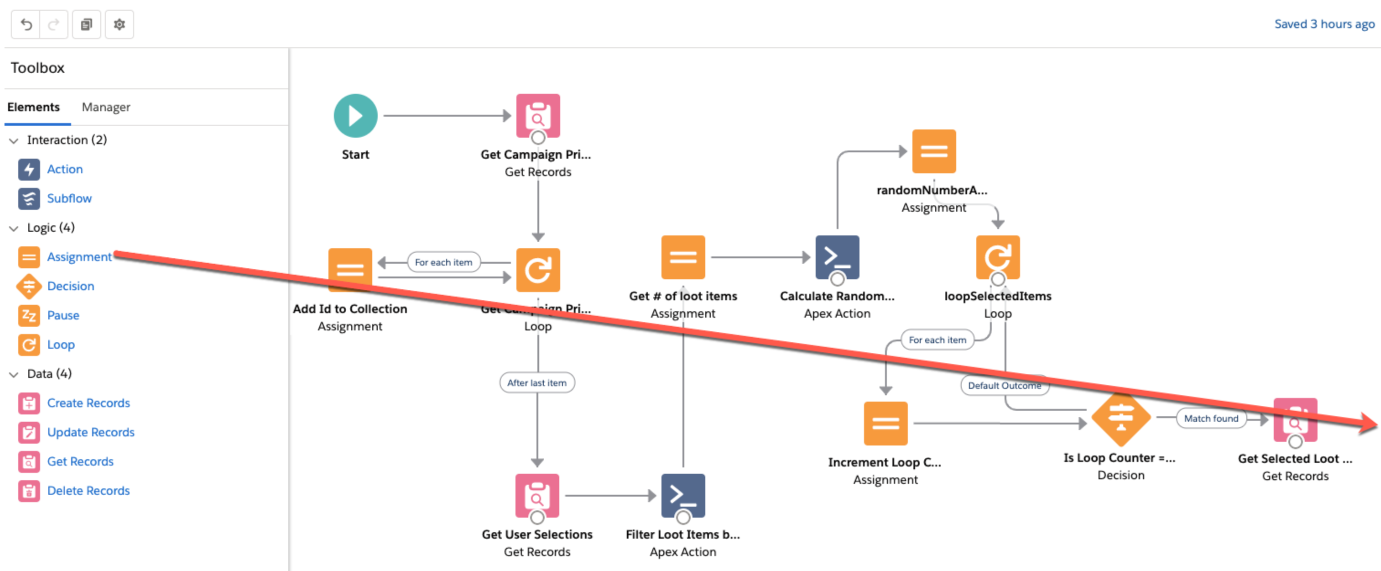


6. Click on the **Manager** tab and click on **New Resource**



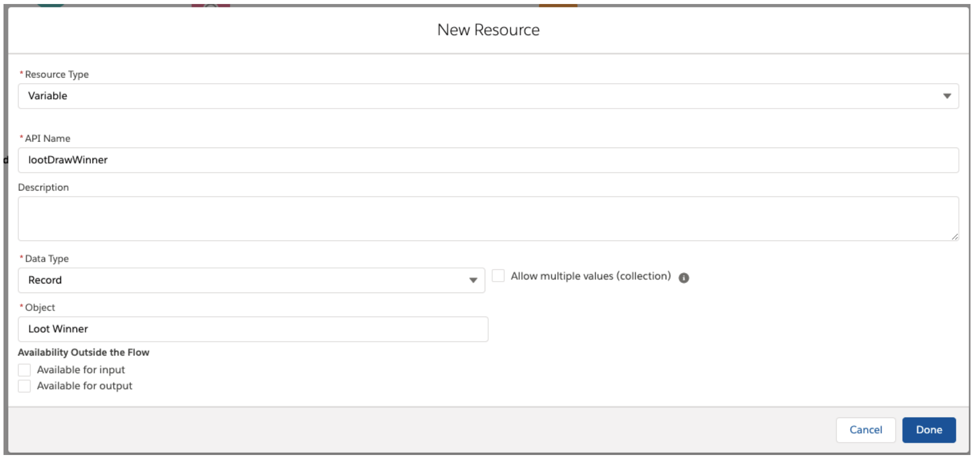
7. On the screen that pops up, enter the following details.

8. Drag an **Assignment** element onto the canvas to the right of the **Get Selected Loot Item** element.

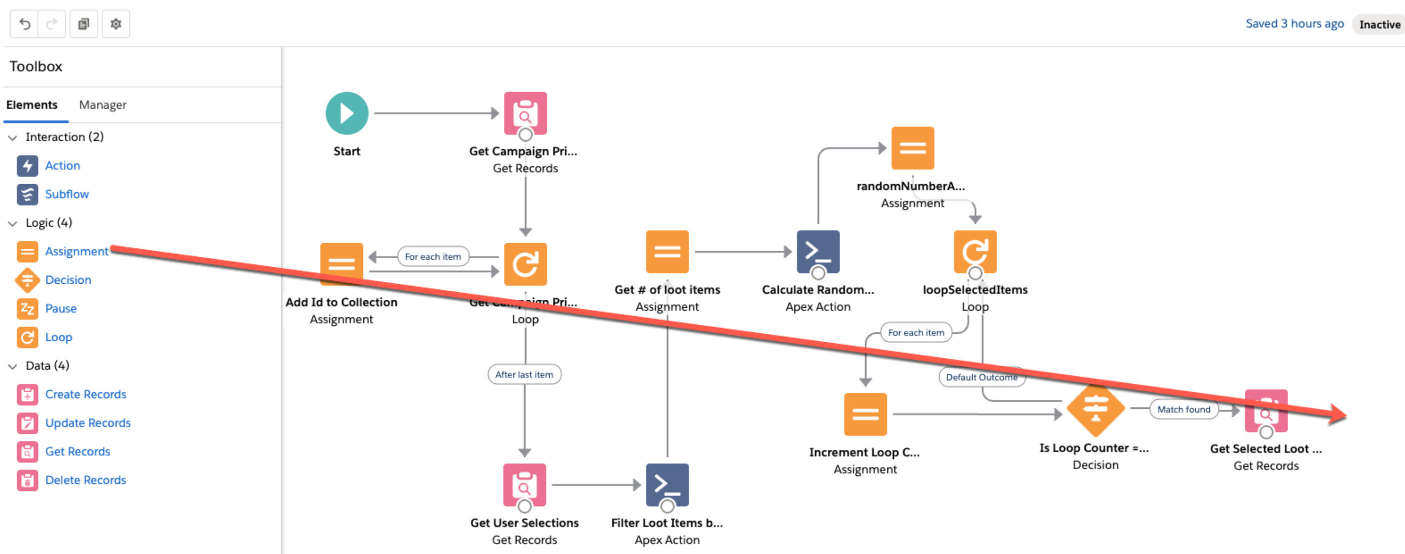


9. Enter the following details on the modal that opens and click **Done**.

Parameter	Value
Resource Type	Variable
API Name	lootDrawWinner
Data Type	Record
Allow multiple values (collection)	Unchecked
Object	Loot Winner



10. Drag an **Assignment** element to the right of the **Get Selected Loot Item** element.



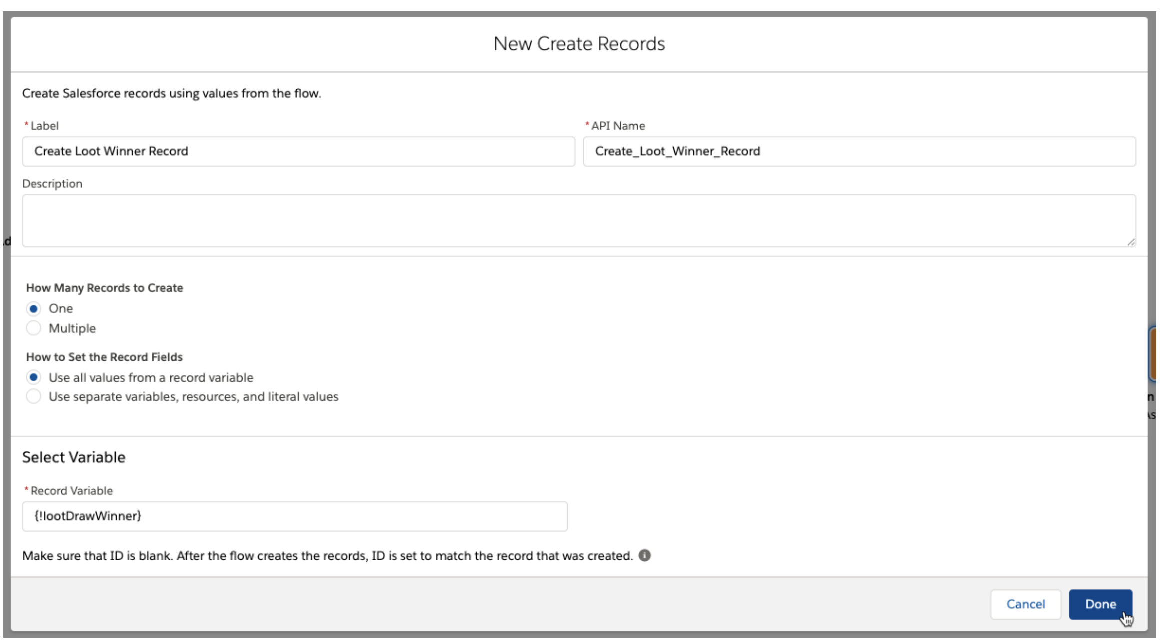
11. On the modal window that opens enter the following details. To add a second variable click +Add Assignment. Click Done after adding all assignments.

Parameter	**Value**
Label	Assign Values to Loot Winner Variable
API Name	Assign_Values_to_Loot_Winner_Variable (auto populates)
Variable	{!lootDrawWinner.Participant__c} NOTE - You will see autopopulate behavior. Start typing lootDrawWinner. Select lootDrawWinner and you will see a list of Loot Winner fields that you can select from since this variable is of type Record.

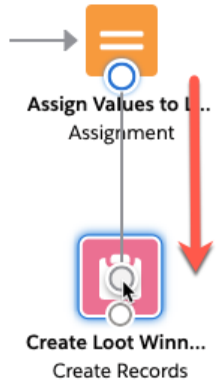
Operator	Equals
Equals	{!winningLootItem.Participant__c}
2nd Variable	
Variable	{!lootDrawWinner.Prize__c}
Operator	Equals
Equals	{!winningLootItem.Prize__c}

12. Drag a **Create Record** element below the **Assignment** element you just created. On the modal window that pops up enter the following values. Click **Done** when complete.

Parameter	**Value**
Label	Create Loot Winner Record
API Name	Create_Loot_Winner_Record (auto populates)
How Many Records to Create	One
How to set the Record Fields	Use all values from a Record Variable
Select Variable	lootDrawWinner

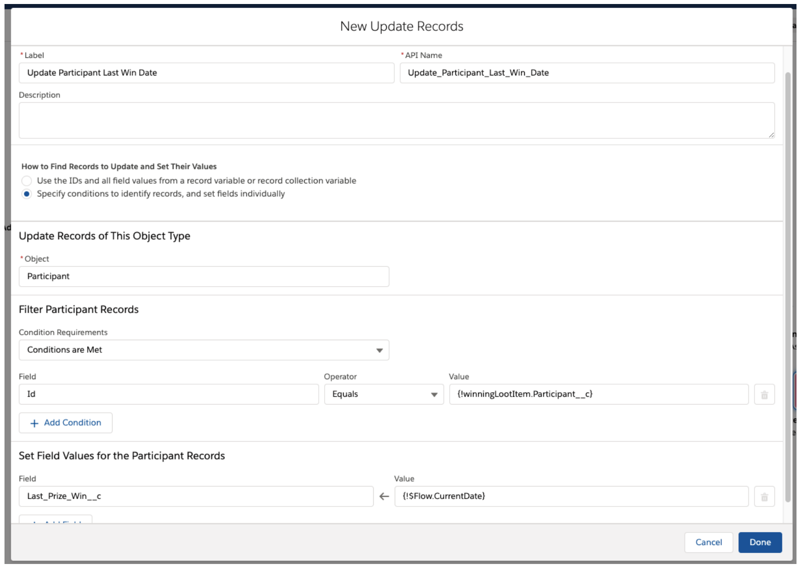


13. Connect the Assignment element to the Create Record element by dragging the circle under the Assignment element to the circle under the Create Record element.

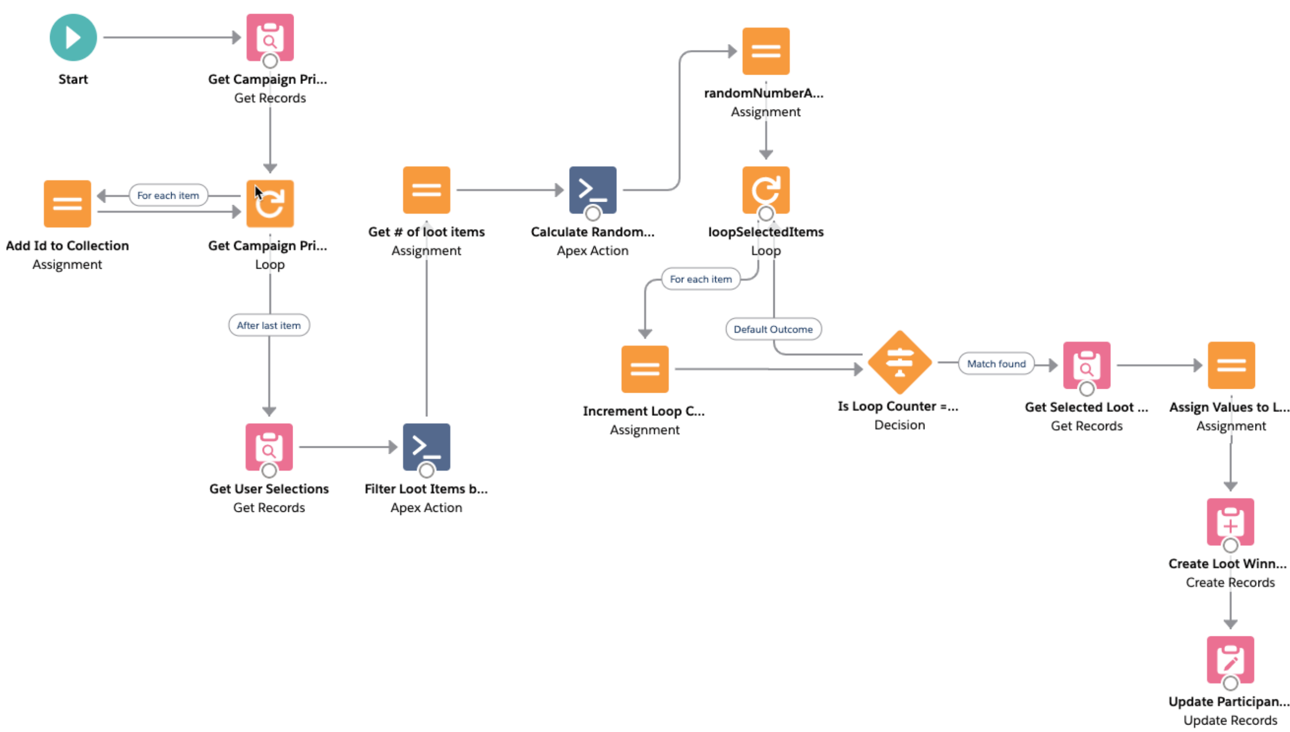


14. Drag an **Update Record** element next to the Create Loot Winner element you just configured. On the modal popup enter the following information and click **Done.**

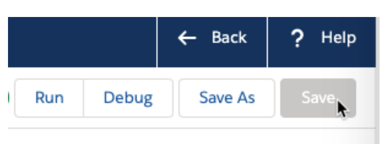
Parameter	Value
Label	Update Participant Last Win Date
API Name	Update_Participant_Last_Win_Date
How to Find Records to Update and Set Their Values	Specify conditions to identify records , and set fields individually
Object	Participant
Filter Participant Records	
Condition Requirements	Conditions are Met
Field	Id
Operator	Equals
Value	{!winningLootItem.Pariticpant__c}
Set Field Values for Participant Records	
Field	Last_Prize_Win__c
Value	{$Flow.CurrentDate} NOTE – Look for $Flow in the auto suggestions, click into and choose Current Date



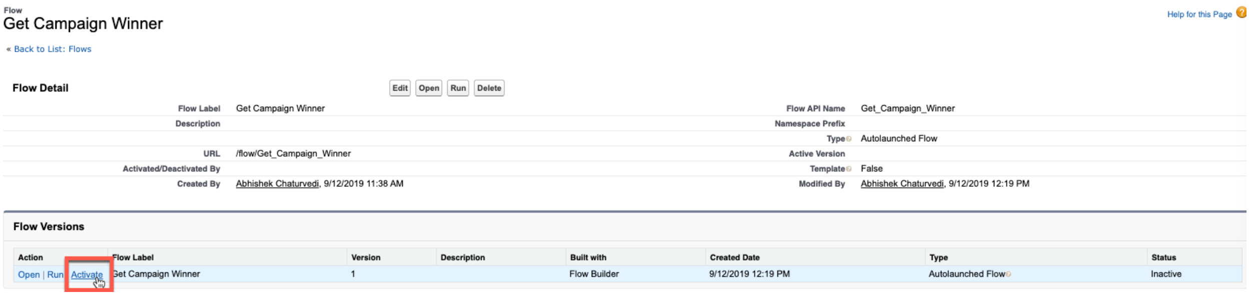
15. Connect the **Create Loot Winner** element to the **Update Participant** element you just created. Your flow should now look like this



16. Click **Save** and then **Back** on the top right corner.



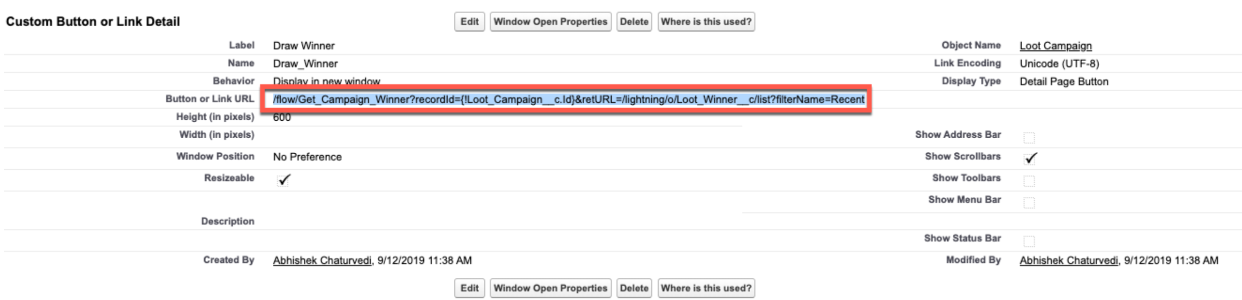
17. Click on **Activate** on the flow detail page. The flow is ready to be used now.



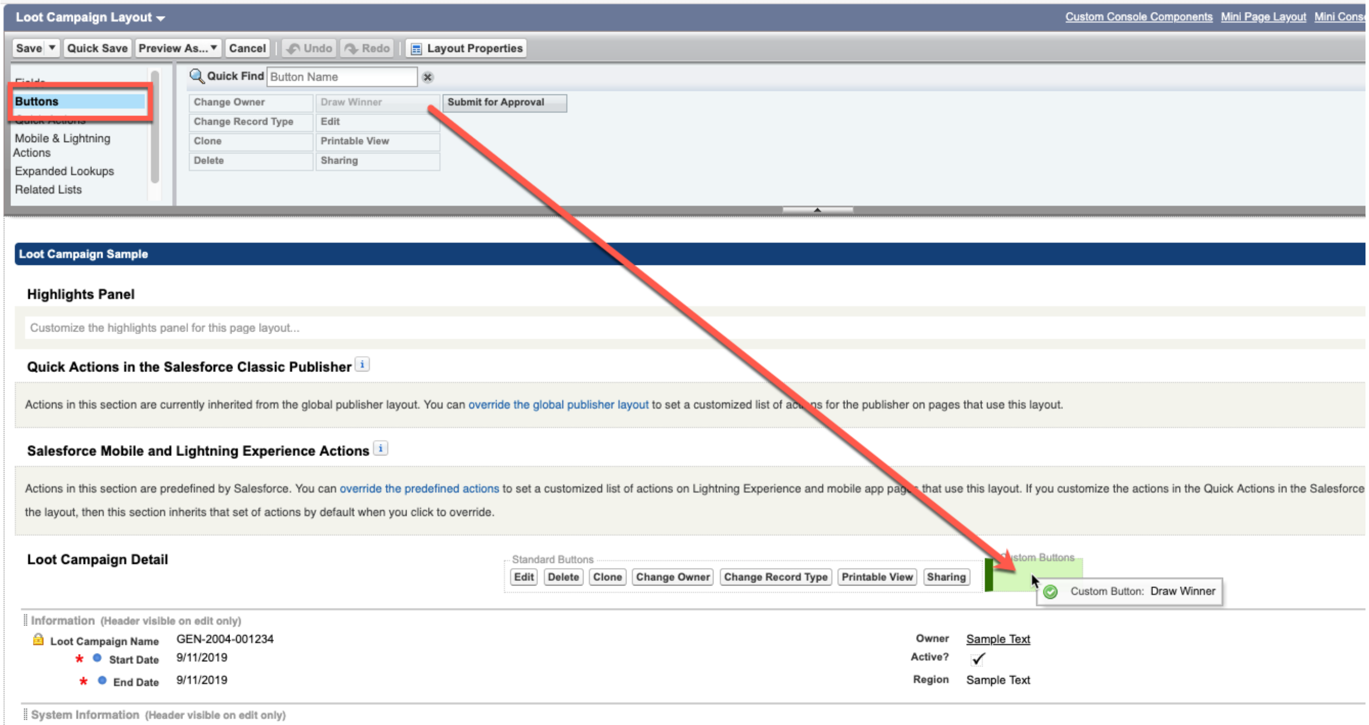
Invoking the Flow via a Button

As you saw in the presentation, there are multiple ways of invoking a flow in Salesforce. In this case we are using a button on the Loot Campaign object to draw a winner.

1. Navigate to the **Object Manager** in **Setup** and access the **Loot Campaign** object.
2. Click on **Button, Links and Actions** and click on the **Draw Winner** button.
3.



4. The **Draw Winner** button is a custom button created for the **Loot Campaign** object. This button invokes a URL when it is clicked. In this case we are using the flow's URL. Just like a regular URL, you can pass parameters to the flow using key value pairs like URL parameters. Use any variable names from the flow as the key, and you can pass in either hard coded values or values from the current Loot Campaign record or related records to the flow. These values or merge fields can be inserted using a formula editor just like the one you use for creating formula fields.
5. We are passing two parameters to the flow. A **recordId** parameter which we defined in the flow and will have the value of the current record's Id. The second parameter is a standard parameter named **retURL** which determines where the user should be redirected after the flow. Feel free to click **Edit** and explore further.
6. We don't have to do anything to the button. Navigate to the **Loot Campaign Layout** page layout. Click on **Buttons** and add the **Draw Winner** button to the page layout in the **Custom Buttons** section.

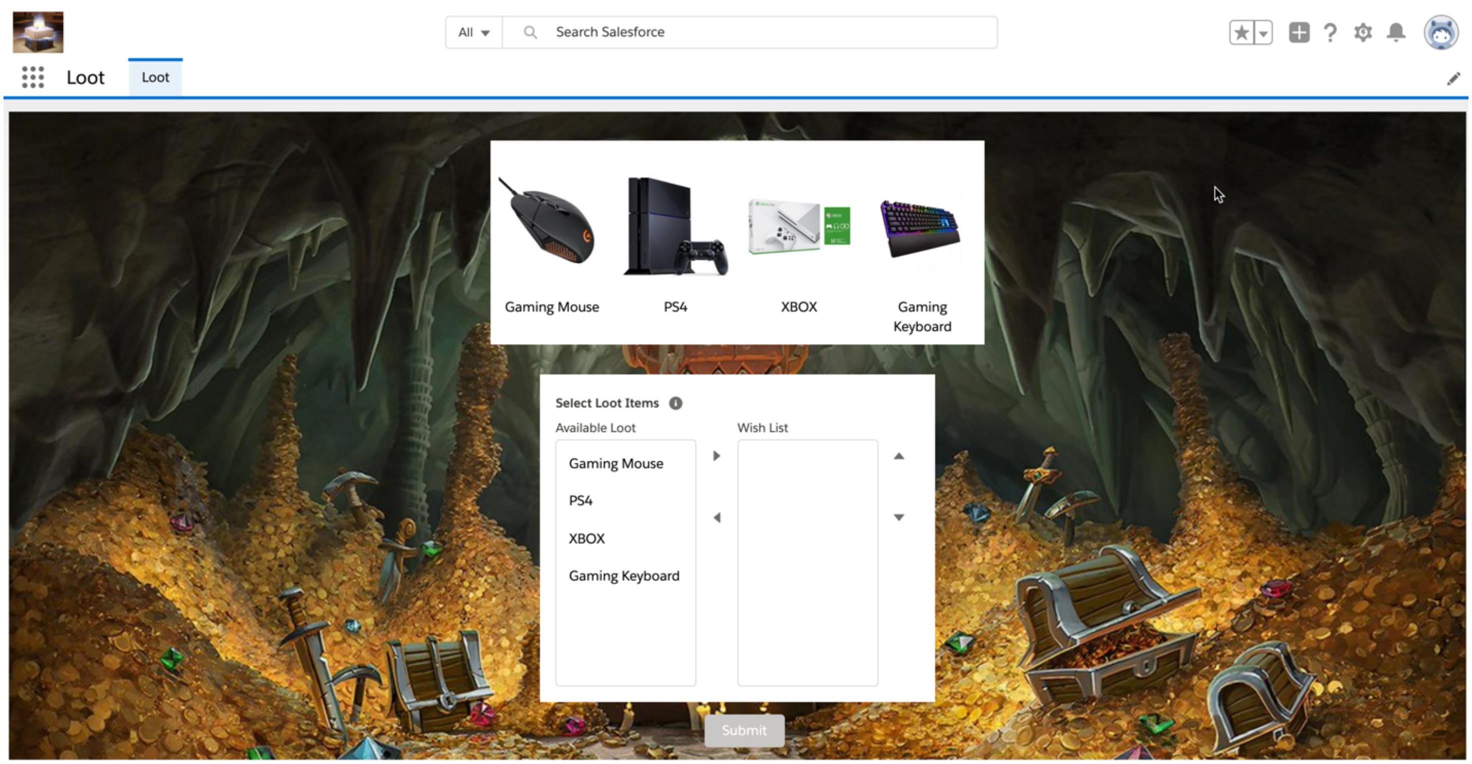

Loot Campaign Layout
Custom Console Components
Mini Page Layout
Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Buttons
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Quick Find
Button Name
Change Owner
Draw Winner
Submit for Approval
Change Record Type
Edit
Clone
Printable View
Delete
Sharing
Loot Campaign Sample
Highlights Panel
Customize the highlights panel for this page layout...
Quick Actions in the Salesforce Classic Publisher
Salesforce Mobile and Lightning Experience Actions
Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightning Experience and mobile app pages that use this layout.
Loot Campaign Detail
Standard Buttons
Edit
Delete
Clone
Change Owner
Change Record Type
Printable View
Sharing
Custom Button: Draw Winner
Information (Header visible on edit only)
Loot Campaign Name
GEN-2004-001234
Start Date
9/11/2019
End Date
9/11/2019
Owner
Sample Text
Active?
Region
Sample Text
System Information (Header visible on edit only)

7. Click **Save.**

Lab 6 – Try out the Loot App

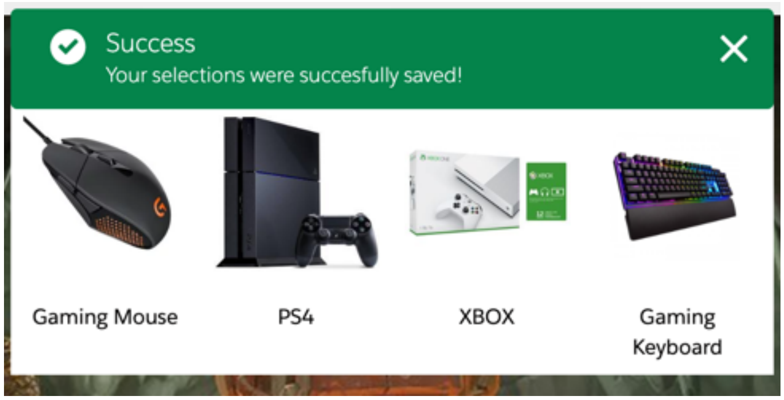
Now that we have configured everything to administer a Loot Campaign and for end users to be able to select loot items, let's try out the Loot App.

1. Navigate to the **Loot** app via the **App Launcher** menu. You should see a screen like the following screen shot. Remember that we created this campaign for **West** region and assigned the **West** region for your user record. The **lootSelector** Lightning Web Component has logic to make sure that correct audience sees the campaigns assigned to them. Later you can change the region of your user to East and see if you can still see the campaign.

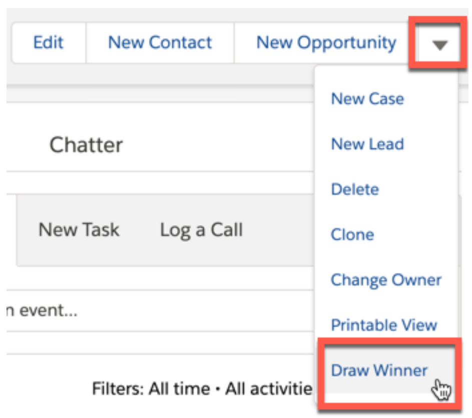


2. While we added only one component to the page using the Lightning App Builder, there are actually multiple components on the screen contained within the single component. Here the images on the top are from a separate component but it has been nested in the lootSelector component. The components also use Salesforce Lightning Design System.
3. The Loot Item selector dual picklist itself is a Lightning base component and can be configured easily to tie to a Salesforce Object.
4. Move any 3 items from the **Available Loot** section to the Wish List section. Reorder them if you wish. Click **Submit** and you should see a toast notification confirming your selection. The toast is also easily created via standard libraries and functions available for Lightning

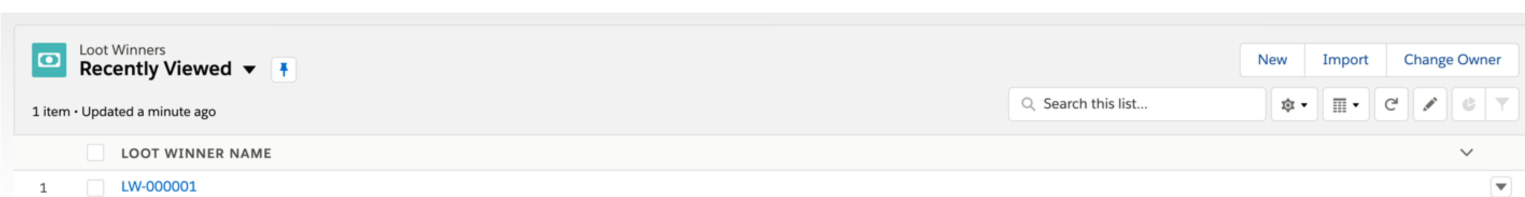
Web Components. These selections will be retained even if you navigate away from the app.



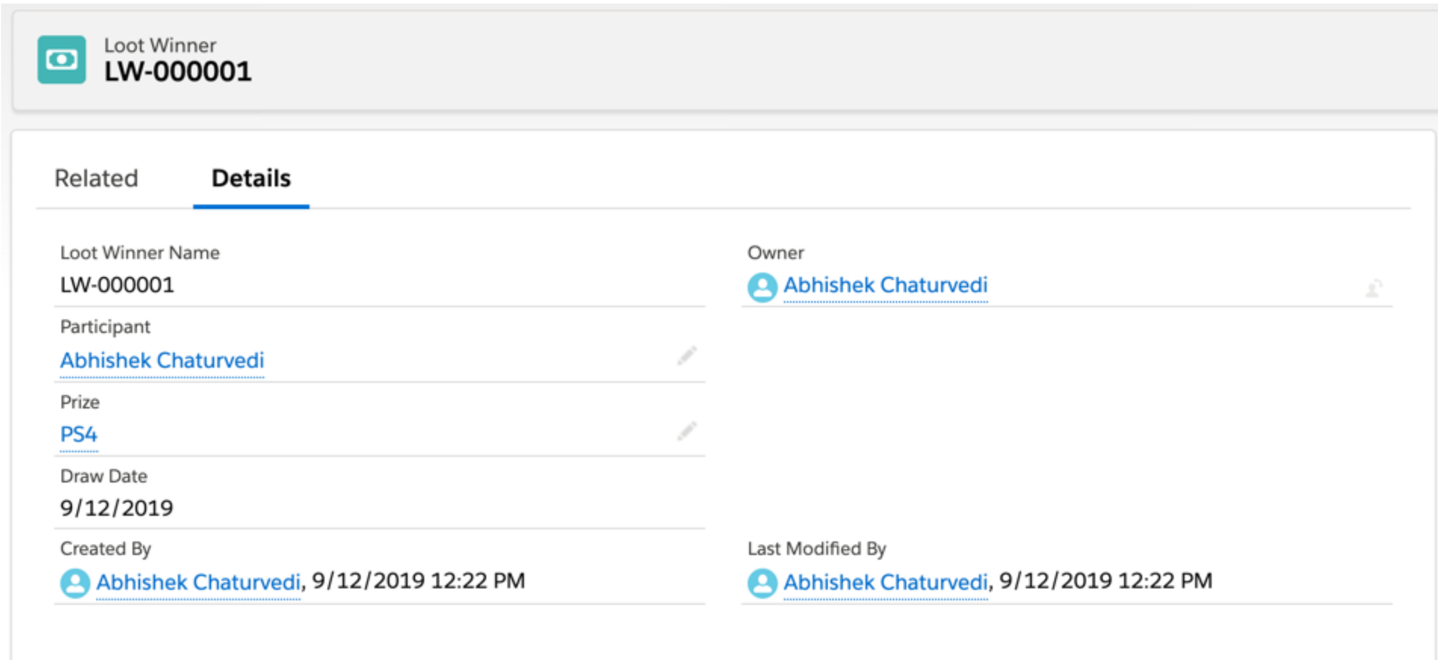
5. A lot of things happened in the background when clicked **Submit.** A **Participant** record was created based on your user details. **Selected Loot Items** records were also created corresponding to your choices with the correct order of preferences.
6. Navigate to the **Loot Administration** app and go to the respective tabs for **Participants** and **Selected Loot Items** tab to see the newly created records. Remember you can also see **Selected Loot Items** for each **Participant** on the participant record itself in the **Related** tab.
7. We could load more participant data and create more Selected Loot Items but for now we will just draw a winner to see our flow in action. Navigate to the **Loot Campaign** record you created. If you don't see the **Draw Winner** button, click on the downward arrow next to the **New Opportunity** button, locate the **Draw Winner** button and click it.



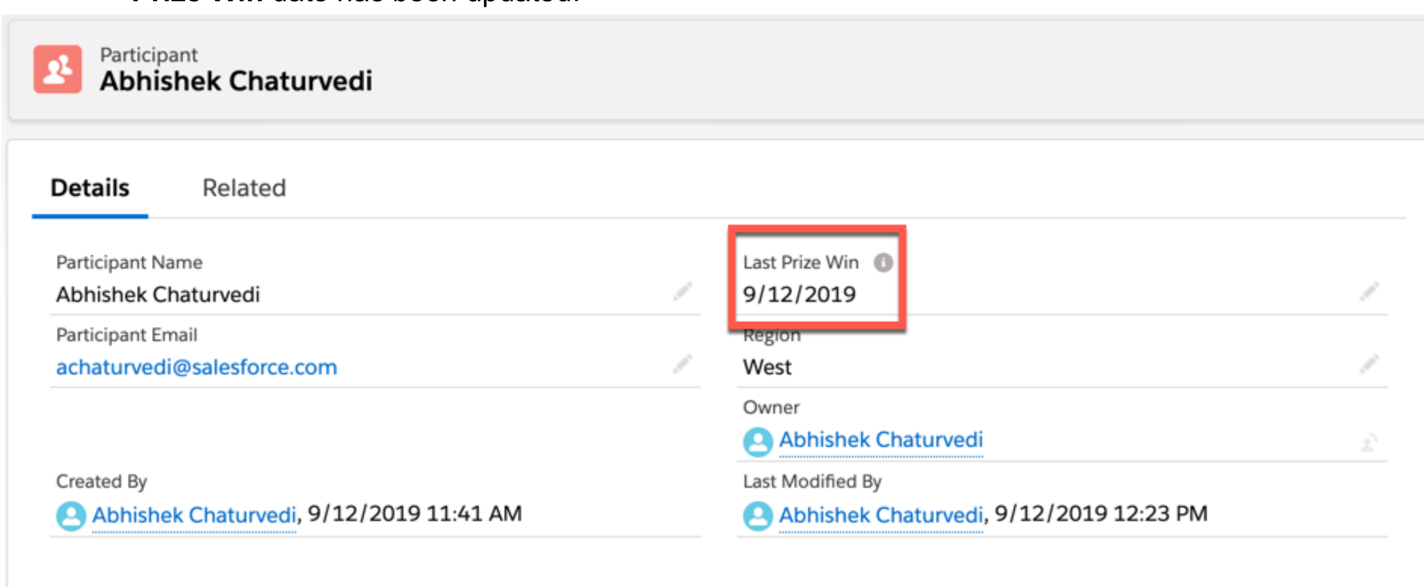
8. You will be redirected to the **Loot Winners** tab and you should see a **Loot Winner** record created. Click on the record.



9. On the detail page for the **Loot Winner**, you should see the Participant, Selected Loot Items and Draw Date populated. This was all done by the flow we configured! Also remember the Draw Date is a formula field based on the **Participant** record.



10. Click on the **Participant** name and navigate to the related participant record. See if the **Last Prize Win** date has been updated.

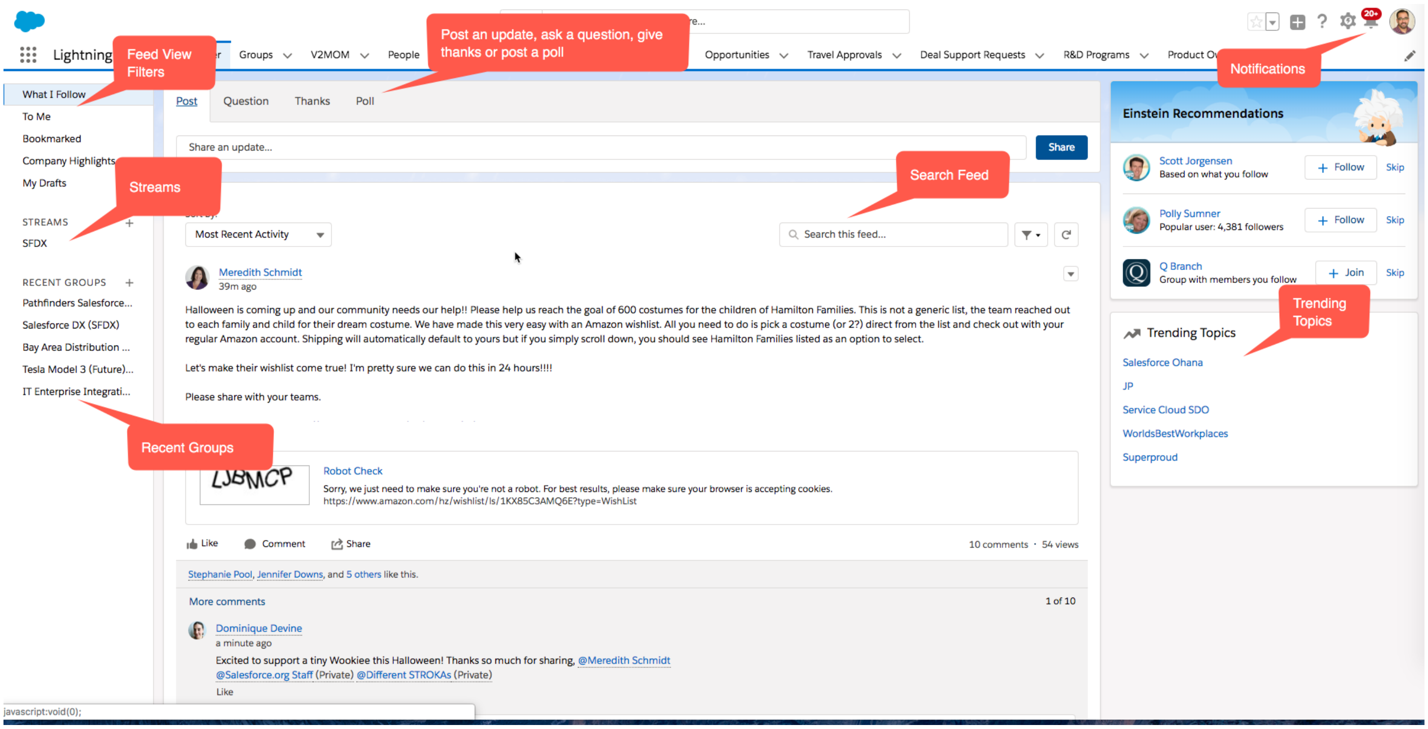


11. All set! Loot App tour complete!

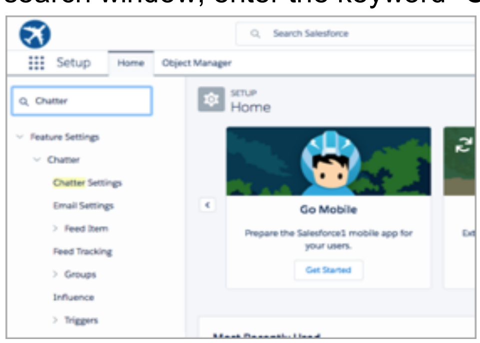
Lab 7 – Optional - Collaboration and Mobility

Enable Record Collaboration

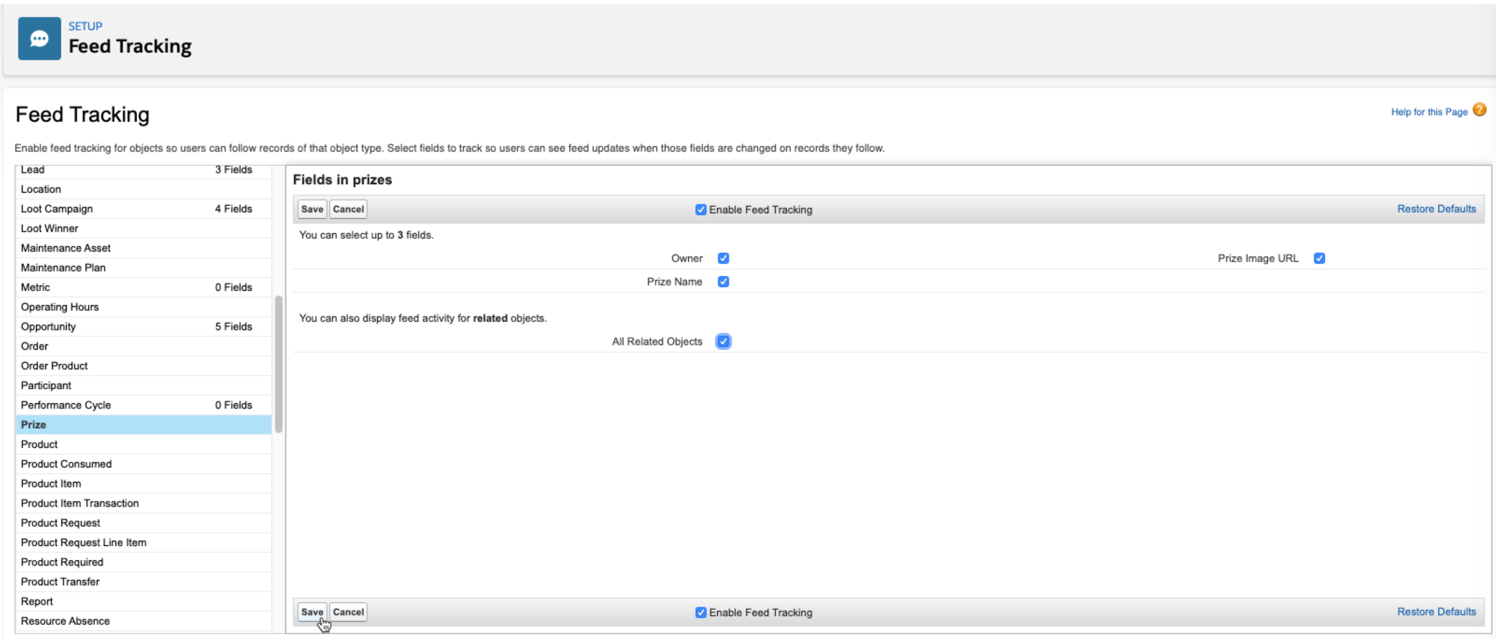
Salesforce includes built in capabilities to collaborate within a Salesforce org and in the context of a record as well. You can follow people as well as data. This includes being able to collaborate around a single record in Salesforce. Here is an overview of the main Chatter tab.



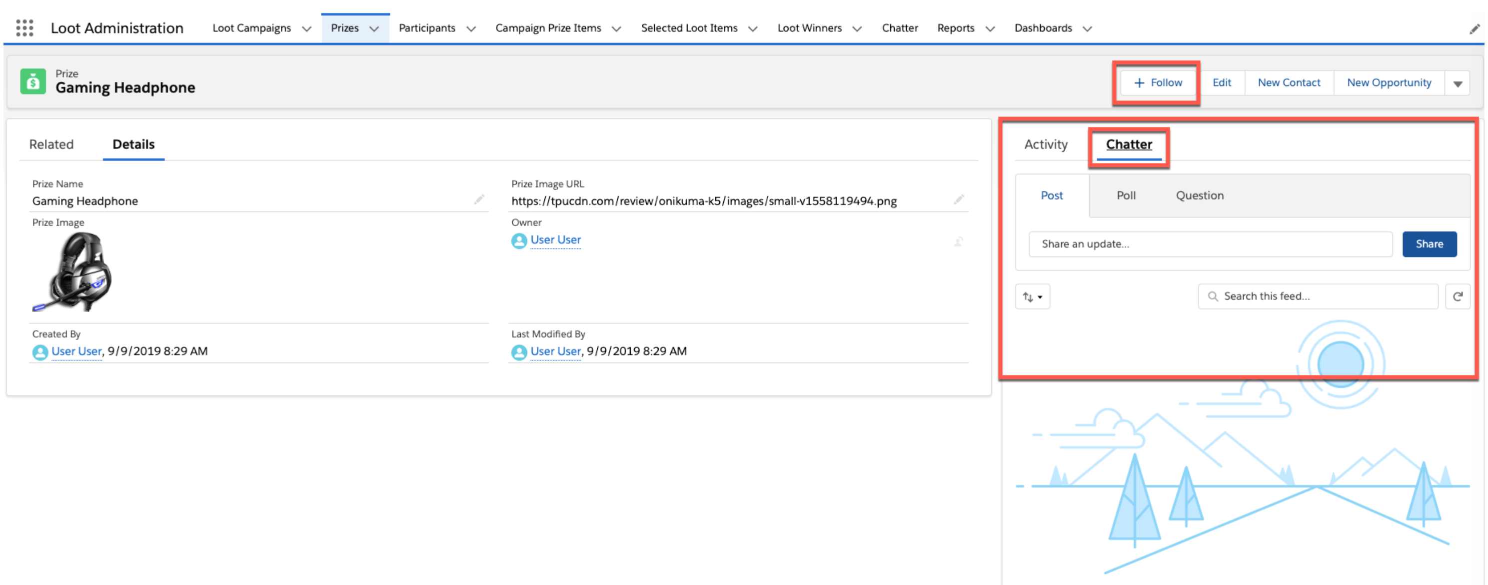
1. Access Setup by clicking the gear icon in upper-right and select **Setup**.
2. In the left-hand **Quick Find** search window, enter the keyword “**Chatter**”



3. Select **Feed Tracking**. You should now be presented with the Feed Tracking window configuration window. In the left-hand side of window is a list of objects, pick **Prize**.
4. Click the **Enable Feed Tracking** checkbox near the middle of the screen.
5. Enable Feed Tracking for all the fields by checking all the checkboxes including the checkbox against **All Related Objects**. Selecting these will result in a message being posted to the record’s chatter feed any time one of the checked fields changes. This is a way to keep people informed of changes to the records.



6. Click **Save** button.
7. Navigate back to the **Loot Administration App** and click on the **Prizes** tab. Select a **Prize** record. You should see a record detail page like below. You should have a **Chatter** tab on right-side of screen as highlighted.
8. Update any of the fields you enabled feed tracking for and check the Chatter update.

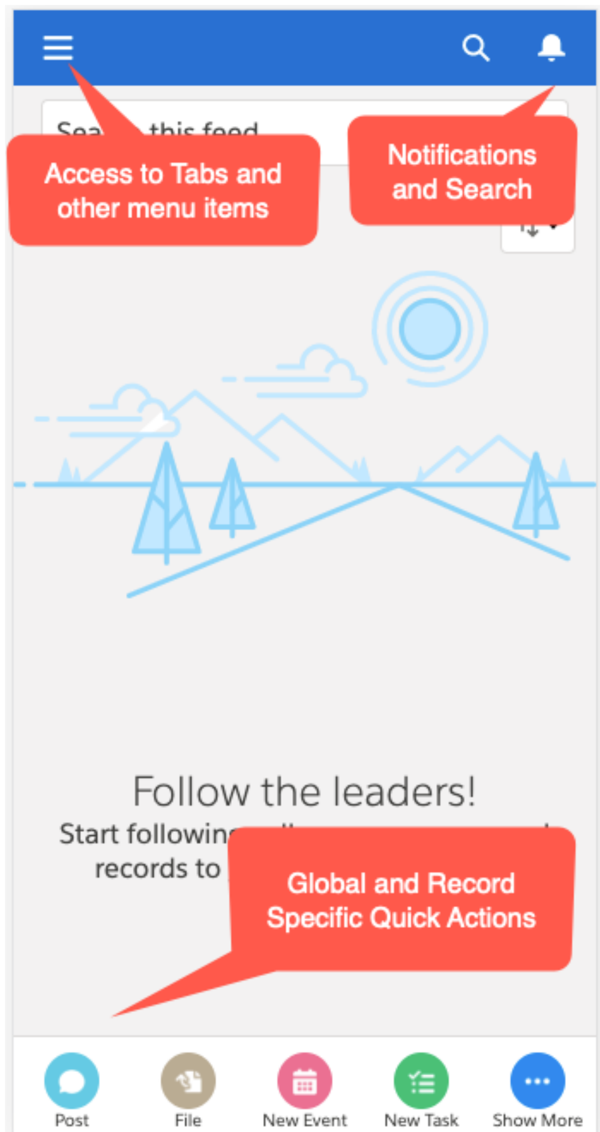


You can also 'Follow' any updates to the fields on the record or any Chatter posts that are made to this record by clicking the '+ Follow' button.

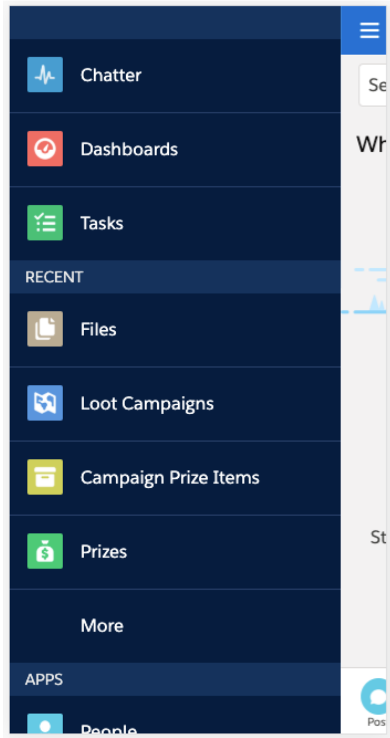
Mobile Access for the Loot Administration App

For this exercise we need to access the Salesforce mobile app. You can access the Salesforce app via the Apple App Store or the Google Play Store. Use the following links to download them on your device –
Salesforce Mobile on the Apple App Store
Salesforce Mobile on the Google Play Store
You can also use the following Chrome extension from the Chrome Web Store to emulate a mobile form factor
S1 Demo Chrome Extension

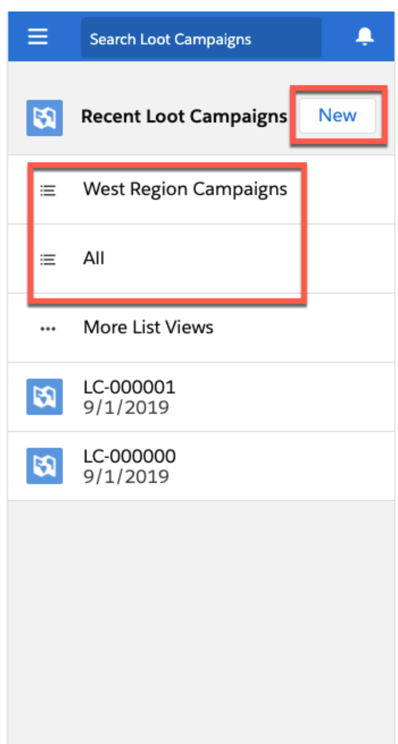
1. Open the mobile app or the chrome extension and log in with your Salesforce user name and password. You should see the following screen.



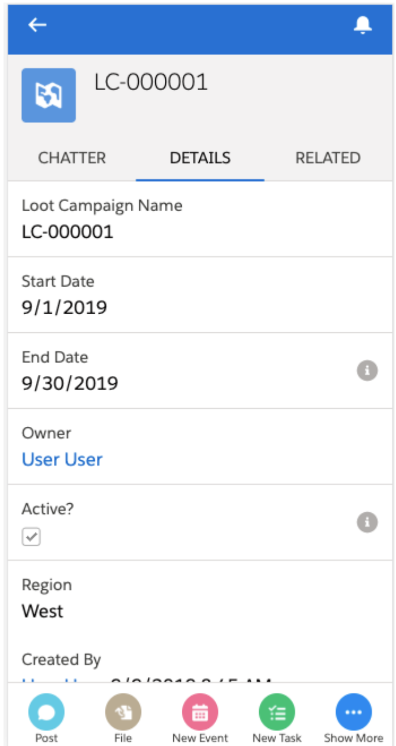
2. Click on the hamburger menu to reveal menu items. Scroll down to see the different sections if the menu. If you don't see the tab you're looking for under the 'Recent' section click on 'More' to reveal more tabs.



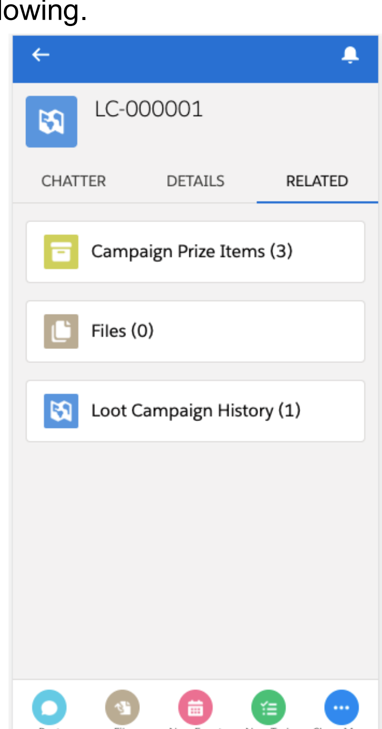
3. You can see the list views you created, recent Request records you accessed and a button to create new Request records.



4. Click on a Loot Campaign Record. You will see the same fields that you added to the Page layout on the mobile screen. The permissions you set for record access will also be respected in the mobile app.



5. Click on the **Related** tab to see the related lists associated with the Loot Campaign. You should see a screen like the following.



6. Click on the **Campaign Prize Item** card. You will see high level details of the Campaign Prize Items. You can click into each for Campaign Prize Item record to see more details. You can also create a new Campaign Prize Item by clicking the 'New' button.