

salesforce

# Salesforce Developer Workshop



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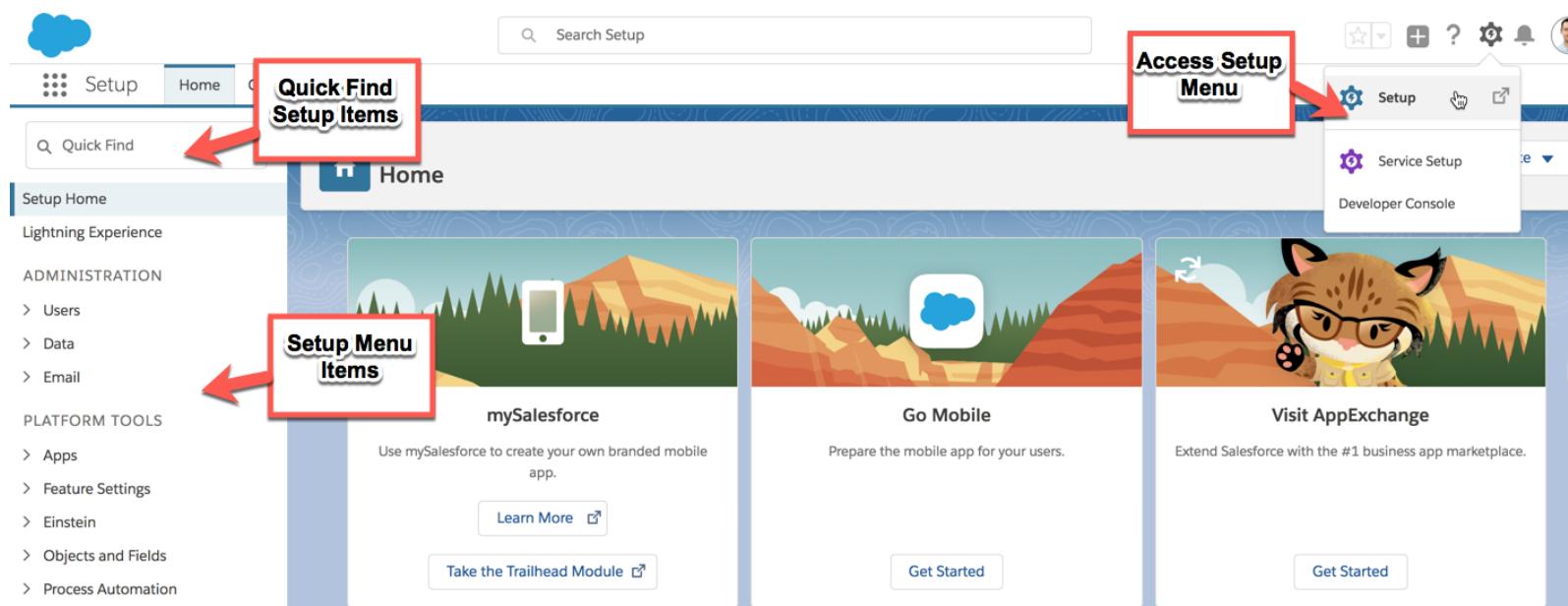
    Mobile Access for the Loot Administration App

# 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**

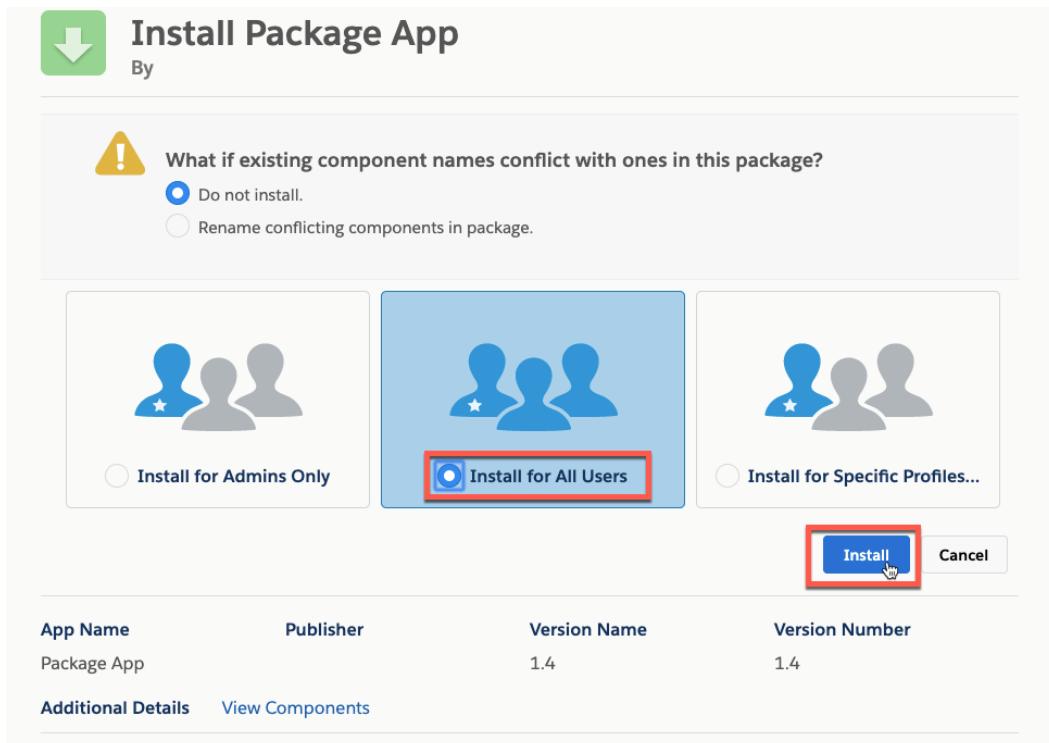
# Lab 1 – Manage the data model for your app

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.

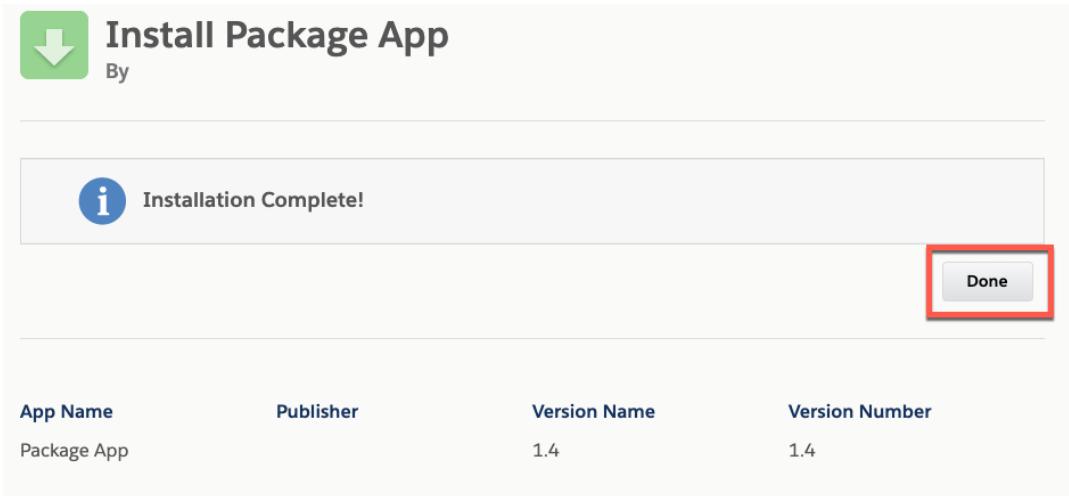
The **Loot Administration** and the **Loot** app are composed of multiple Salesforce objects. In the interest of time we have created some of those objects already. Before we get started with creating new objects and extend existing objects, let's install a package containing the objects we created into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

Search Setup

Object Manager

Schema Builder

Installed Packages

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#).

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as “In Development” and are not deployed to your users. This allows you to test and customize before deploying other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits
Uninstall	Package App	Activision Blizzard CDO	1.4		9/5/2019 11:35 AM	✓

Uninstalled Packages

No uninstalled package data archives

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

Search Setup

Object Manager

Schema Builder

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

Automatically rearrange objects on the grid

Elements Tab - Tools for creating and extending objects

Object List Views - All Objects, Selected Objects, Standard Objects, Custom Objects, System Objects

Quick Find Search for Objects

List of Objects Select Checkbox to display object on grid/canvas.

Account

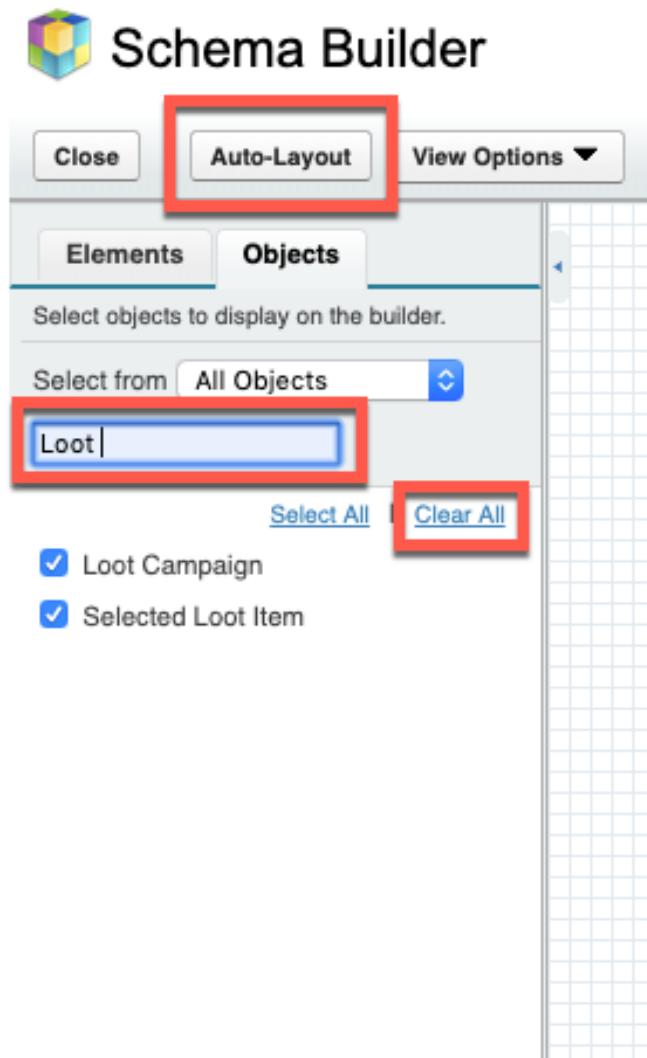
Contact

Legend

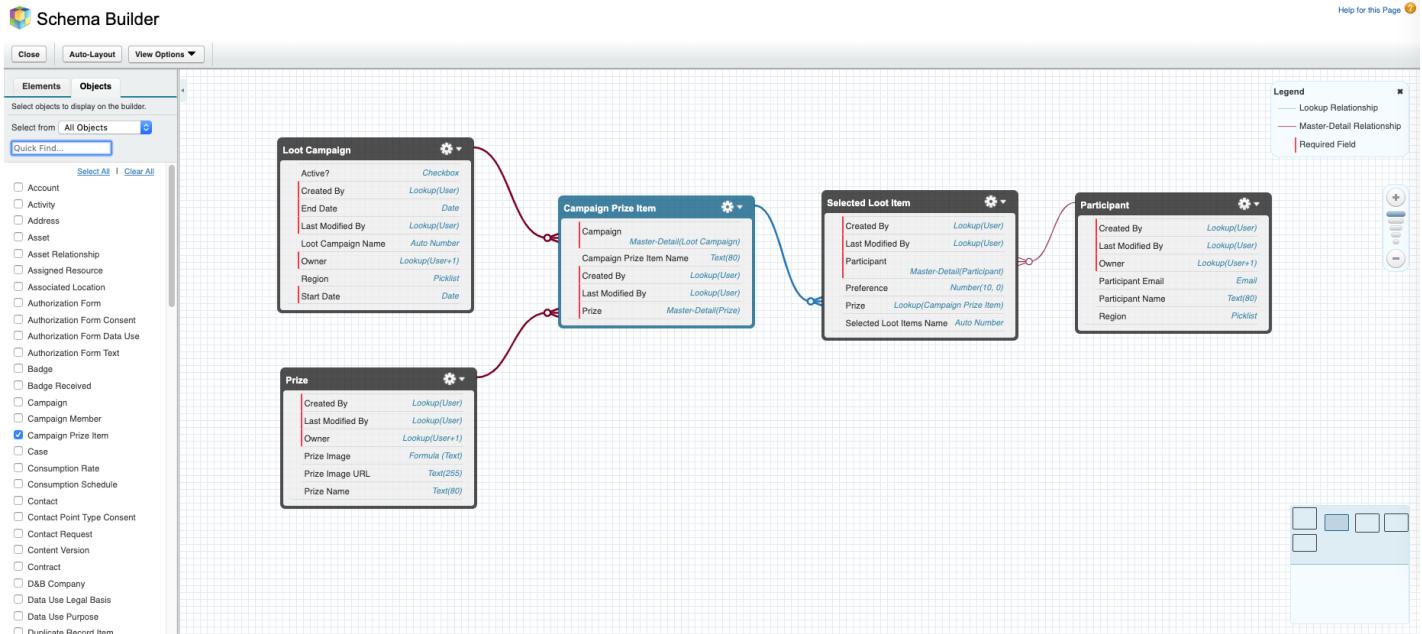
Zoom Controls

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.

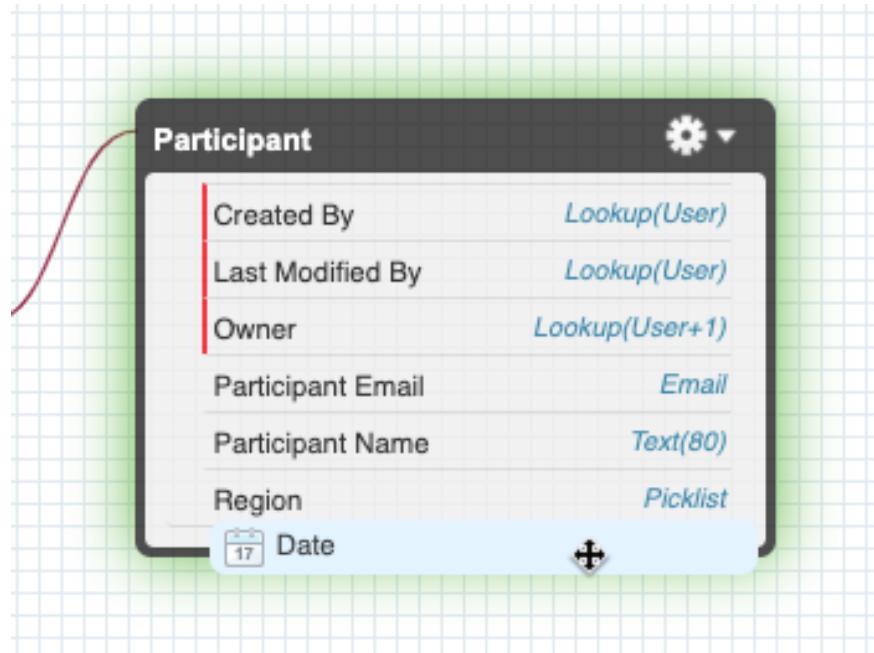


5. Click the Elements tab of the Schema Builder to see the drag and drop elements that can be used to manage and extend your data model.

## 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

**Create Date Field (Object: Participant)**

Field Label	Last Prize Win
Field Name	Last_Prize_Win
Description	Latest Date when the participant won a loot item
Help Text	Latest Date when the participant won a loot item
This text displays on detail and edit pages when users hover over the Info icon next to this field.	
Default Value	
Required	<input type="checkbox"/> Always require a value in this field in order to save a record
<b>Save</b> <b>Cancel</b>	

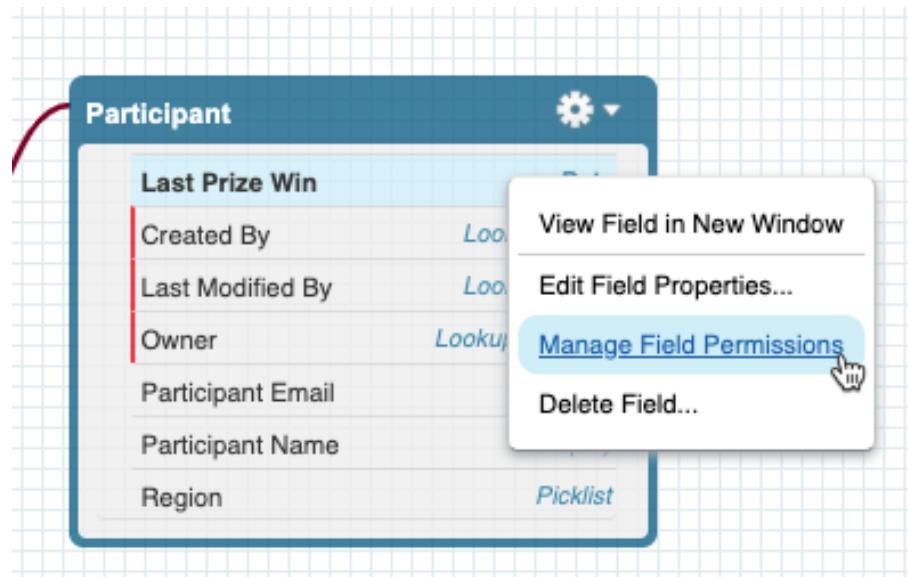
3. Enter the following details for the field

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	<i>Leave Blank</i>
Required	<i>Leave this unselected/unchecked</i>

4. Click **Save**.

5. Set the permissions for the Last Prize Win Field

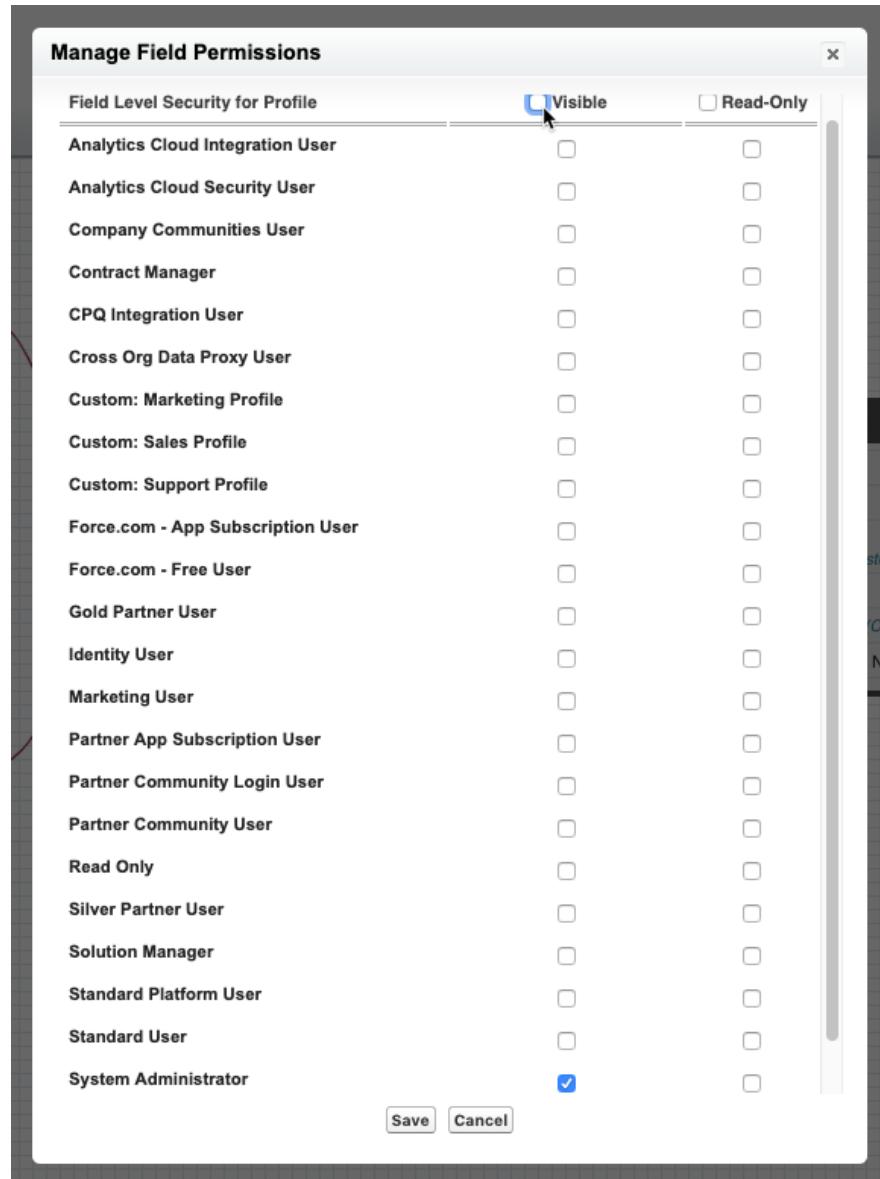
- a. To edit properties of a custom field, right-click the element name or label and select **Edit Field Properties**.



- 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**.



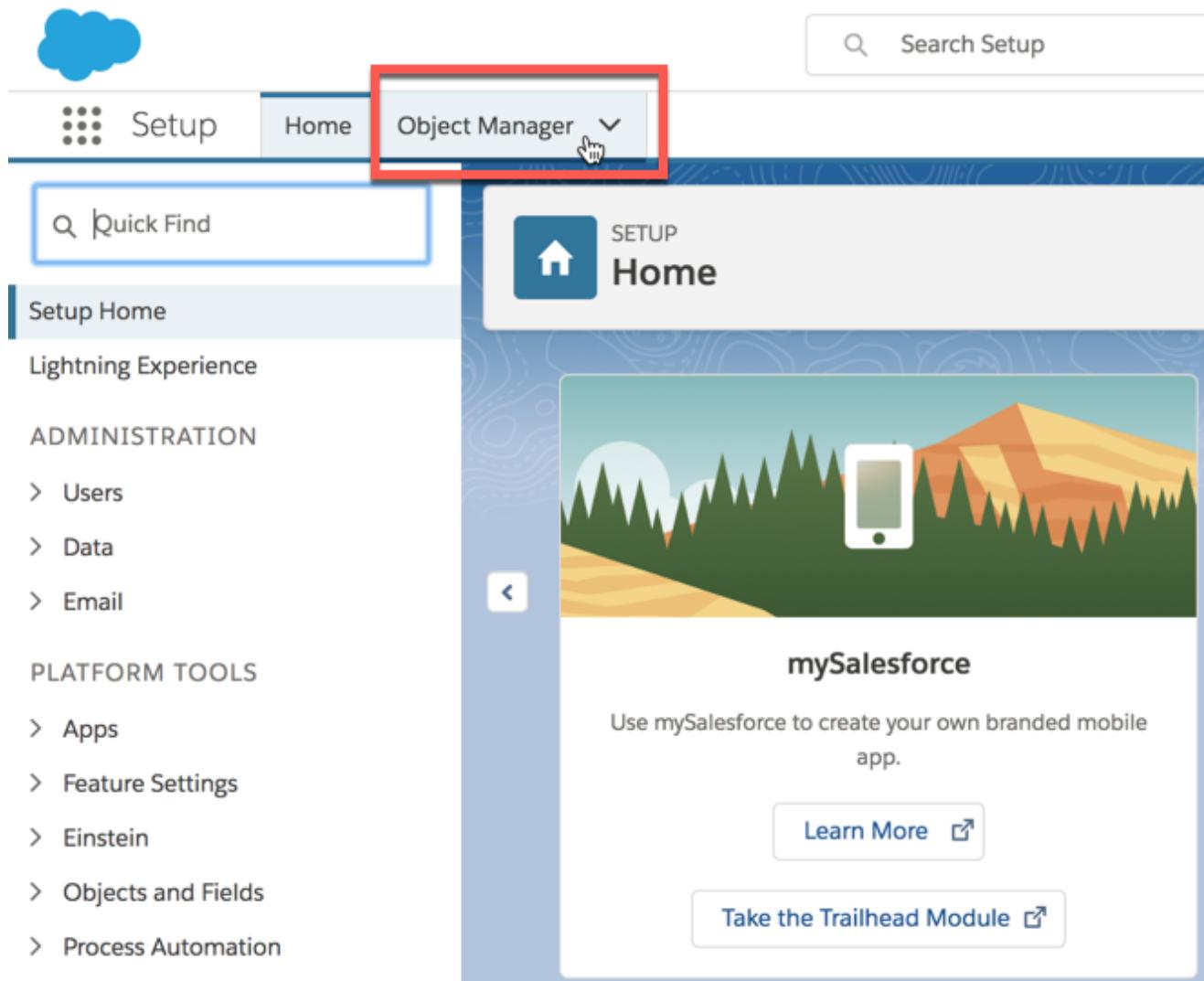
Awesome! You just took a tour of the Schema Builder, visualized the data model for your app, extended it and even managed security permissions for individual elements of the data model.

## Create the Loot Winner Object

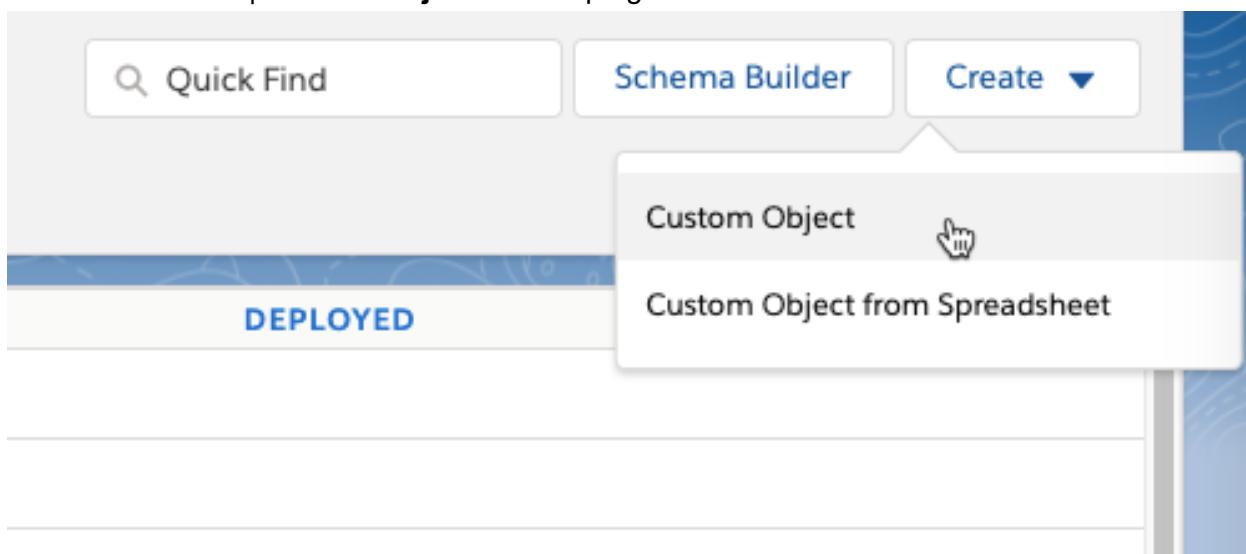
Schema Builder is a great way to quickly create and manage your data model. However, you need to make sure you manage the security settings and explicitly add data elements to the UI after you have created them.

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.

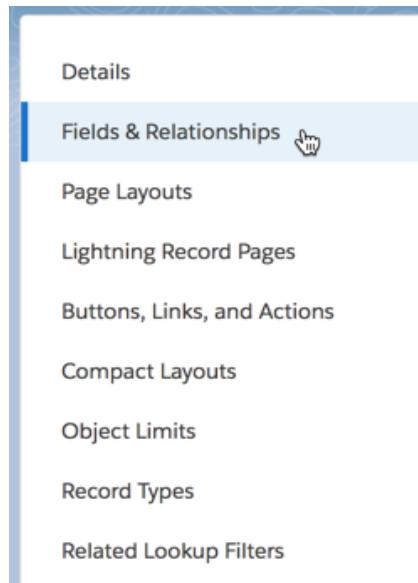
Parameter	Value
Label	Loot Winner
Plural Label	Loot Winners
Object name	Loot_Winner (Will auto populate when you tab out of the label name)
Description	Record of Loot Winners for Loot Campaigns
Data Type	Auto Number
Display Format	LW-{000000}
Allow Reports	Check
Allow Activities	Check
Track Field History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



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



- 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.

Loot Winner  
New Custom Field Help for this Page ?

**Step 1. Choose the field type** Step 1

Specify the type of information that the custom field will contain. **Next** **Cancel**

**Data Type**

None Selected Select one of the data types below.

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

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

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

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

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

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

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

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

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

Loot Winner  
New Relationship Help for this Page ?

**Step 2. Choose the related object** Step 2

Select the other object to which this object is related. **Previous** **Next** **Cancel**

Related To  (C)

**Previous** **Next** **Cancel**

- 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.

Loot Winner  
New Relationship

Step 3 of 6

Step 3. Enter the label and name for the lookup field

Field Label: Participant

Field Name: Participant

Description:

Help Text:

Child Relationship Name: Loot\_Winners

Required:  Always require a value in this field in order to save a record  
 Clear the value of this field. You can't choose this option if you make this field required.  
 Don't allow deletion of the lookup record that's part of a lookup relationship.

Lookup Filter

Optional, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

Show Filter Settings

Previous  Cancel

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.

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

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Company Communities User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CPQ Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Identity User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner Community Login User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community User	<input type="checkbox"/>	<input type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Silver Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work.com Only User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Previous  Cancel

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

Loot Winner  
New Relationship

Help for this Page ⓘ

Step 5. Add reference field to Page Layouts Step 5 of 6

Field Label	Participant	<input type="button" value="Previous"/>	<input type="button" value="Next"/>	<input type="button" value="Cancel"/>
Data Type	Lookup			
Field Name	Participant			
Description				

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field

Loot Winner Layout

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**.

Loot Winner  
New Relationship

Help for this Page ⓘ

Step 6. Add custom related lists Step 6 of 6

Field Label	Participant	<input type="button" value="Previous"/>	<input type="button" value="Save &amp; New"/>	<input type="button" value="Save"/>	<input type="button" value="Cancel"/>
Data Type	Lookup				
Field Name	Participant				
Description					

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Related List

Participant Layout

Append related list to users' existing personal customizations

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

Fields & Relationships

5 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Loot Winner Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Participant	Participant__c	Lookup(Participant)		✓

## 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	<i>Default Selection</i>
Page Layout	<i>Default selection</i>
Add Custom Related Lists	<i>Default Selection</i>

## 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**.

The screenshot shows the 'Step 2. Choose output type' screen of the New field wizard. At the top, there are three buttons: 'Previous', 'Next', and 'Cancel'. Below them, the 'Field Label' is set to 'Drawing Date' and the 'Field Name' is set to 'Drawing\_Date'. The 'Formula Return Type' section contains a list of options:

- None Selected (disabled)
- Checkbox (disabled)
- Currency (disabled)
- Date
- Date/Time (disabled)
- Number (disabled)
- Percent (disabled)
- Text (disabled)
- Time (disabled)

Each option has a description and an example formula. The 'Date' option is selected, showing the following details:

Calculate a date, for example, by adding or subtracting days to other dates.  
Example: `TODAY() > CloseDate`

Calculate a dollar or other currency amount and automatically format the field as a currency amount.  
Example: `Gross Margin = Amount - Cost_c`

Calculate a date/time, for example, by adding a number of hours or days to another date/time.  
Example: `Reminder Date = CloseDate - 7`

Calculate a numeric value.  
Example: `Fahrenheit = 1.8 * Celsius_c + 32`

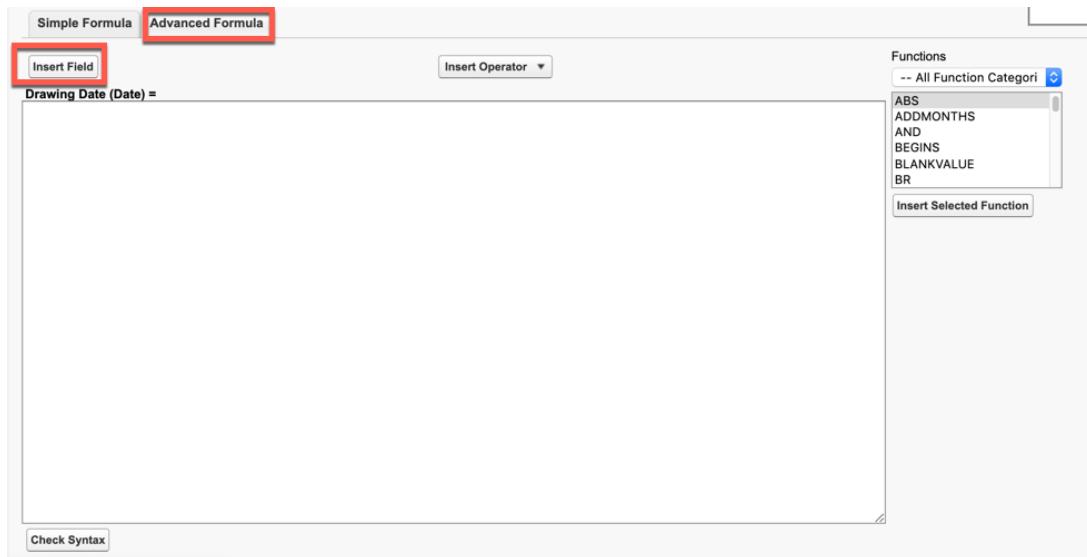
Calculate a percent and automatically add the percent sign to the number.  
Example: `Discount = (Amount - Discounted_Amount_c) / Amount`

Create a text string, for example, by concatenating other text fields.  
Example: `Full Name = LastName & ", " & FirstName`

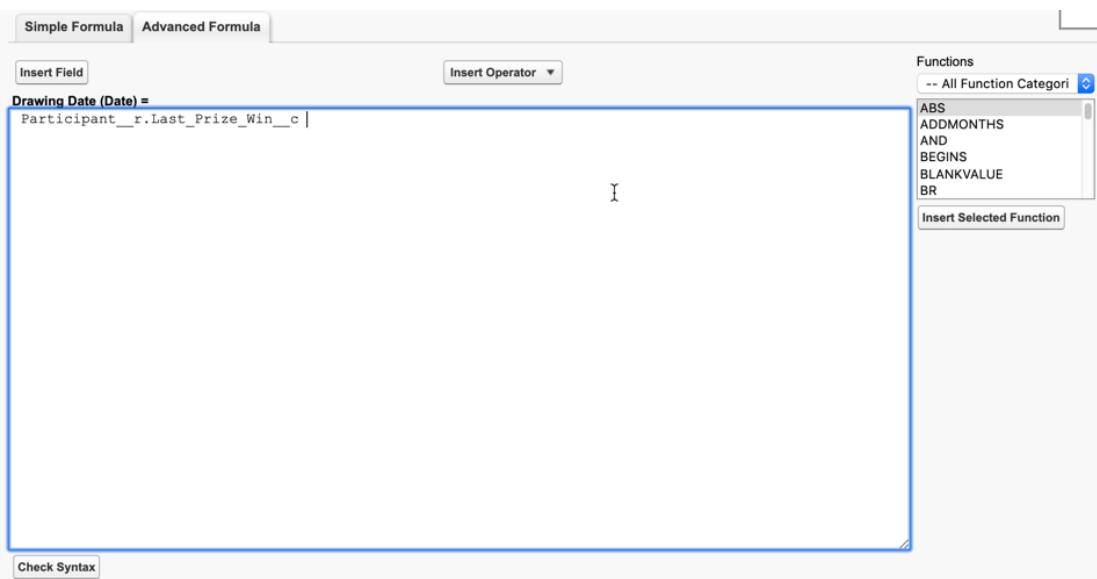
Calculate a time, for example, by adding a number of hours to another time.  
Example: `Next = TIMEVALUE(NOW()) + 1`

At the bottom right of the screen, the 'Next' button is highlighted with a cursor icon.

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.

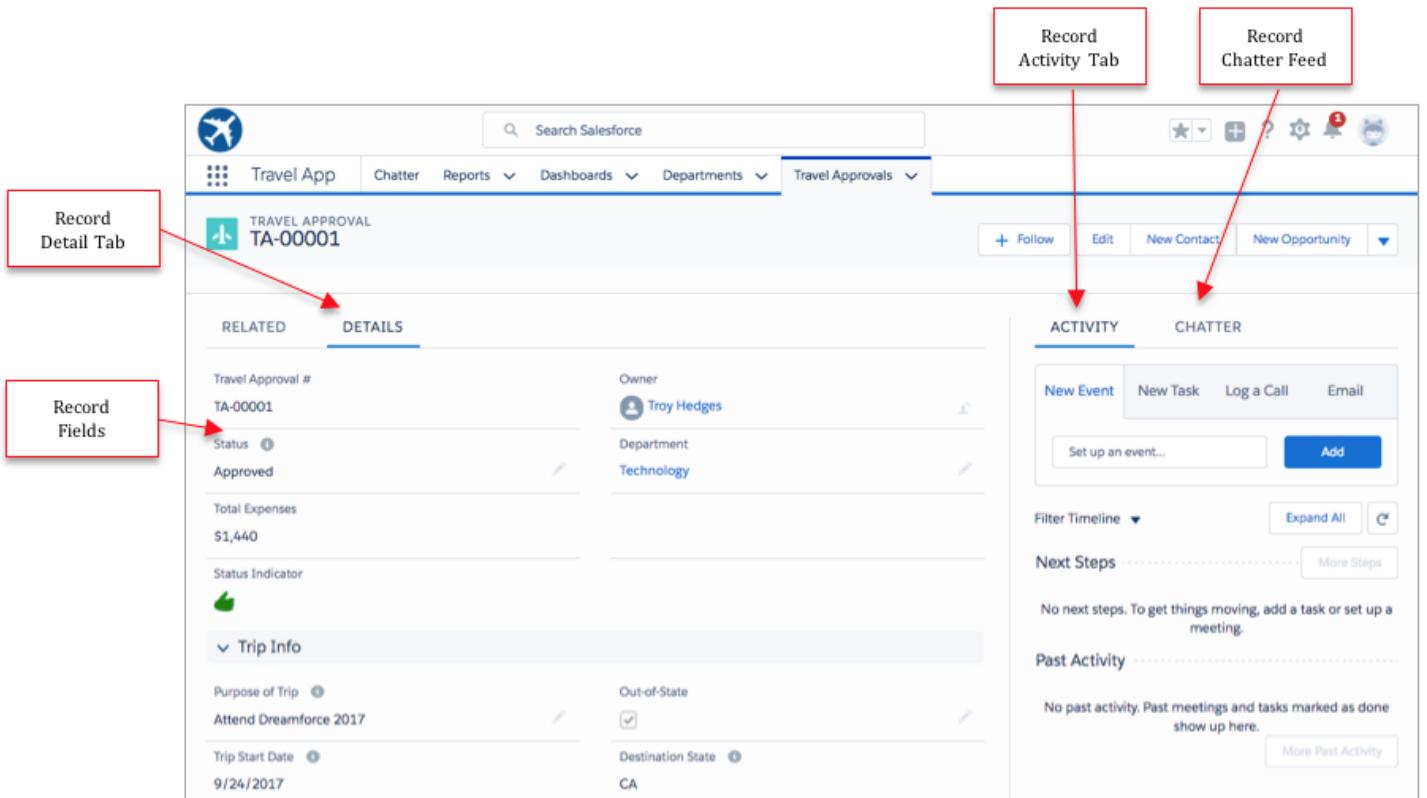
The screenshot shows a Salesforce application interface for a Travel Approval system. The top navigation bar includes the Application Selector (with a Travel App icon), Global Search, Tabs, and various navigation links like Chatter, Reports, Dashboards, and Departments. A specific tab labeled "Travel Approvals" is selected. The main content area displays a list view of travel approvals, with columns for TRAVEL APPROVAL#, DEPARTMENT, CREATED BY, STATUS, TRIP START DATE, TRIP END DATE, and STATUS INDICATOR (represented by green or red thumbs-up icons). The list view selector shows "All". The bottom right corner of the interface has buttons for New, Import, and other actions.

Column	Header	Content
TRAVEL APPROVAL#	TA-00001, TA-00002, TA-00003, TA-00004, TA-00005, TA-00006, TA-00007, TA-00008, TA-00009, TA-00010, TA-00011, TA-00012, TA-00013, TA-00014, TA-00015, TA-00016	
DEPARTMENT	Technology, Technology, Office of Commun..., Disability Determin..., Division of Disabilit..., Technology, Human Resources, Division of Finance, Contract Managem..., Division of Aging, Audit Services, Division of Aging, Disability Determin..., Technology, Office of General C..., Office of Commun...	
CREATED BY	Troy Hedges, Troy Hedges	
STATUS	Approved, Rejected, Approved, Approved, Rejected, Approved, Approved, Rejected, Approved, Approved, Rejected, Approved, Approved, Approved, Approved, Approved	
TRIP START DATE	9/24/2017, 11/9/2017, 6/14/2016, 10/1/2016, 4/3/2016, 3/13/2016, 4/27/2016, 3/9/2016, 12/22/2016, 4/23/2016, 8/9/2016, 11/5/2016, 3/22/2016, 3/6/2016, 11/21/2016, 3/7/2016	
TRIP END DATE	9/29/2017, 11/10/2017, 6/15/2016, 10/1/2016, 4/6/2016, 3/17/2016, 5/5/2016, 3/9/2016, 1/1/2017, 4/28/2016, 8/15/2016, 11/11/2016, 3/22/2016, 3/9/2016, 11/26/2016, 3/16/2016	
STATUS INDICATOR	Green, Red, Green, Green, Red, Green, Green, Red, Green, Green, Red, Green, Green, Green, Green, Green	

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.

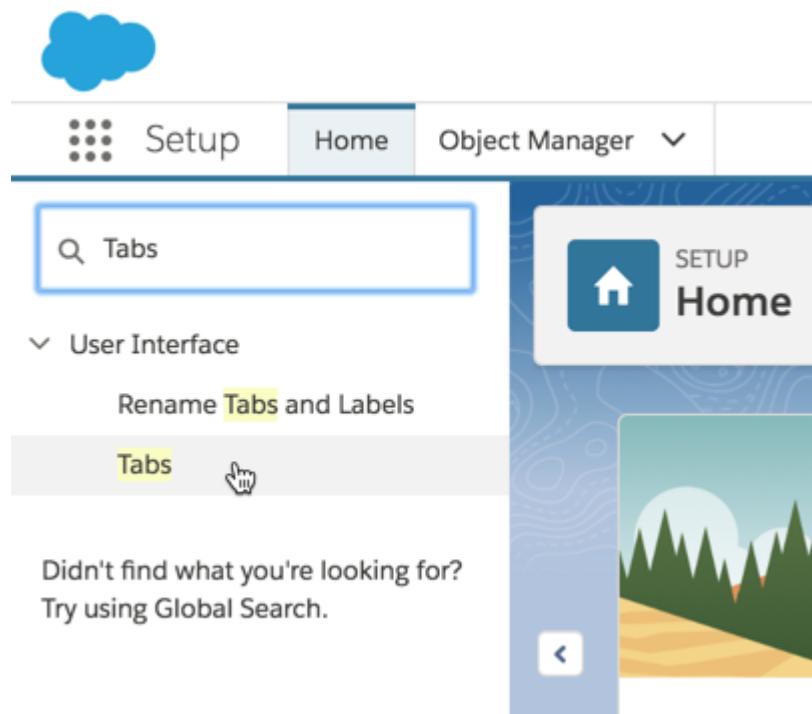
When viewing records in Salesforce, you have option to view the child objects related to your record. These related child objects are referred to “related lists” in the user interface. Below is screenshot of record where the related lists are being shown.

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**

Action	Label	Description
Edit   Del	Campaign Prize Items	
Edit   Del	Loot Campaigns	
Edit   Del	Participants	
Edit   Del	Prizes	
New		New Custom Object Tabs
	Treasure chest	
	Map	
	People	
	Sack	

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**.

**Step 3, Add to Custom Apps**

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

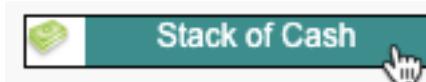
Custom App	Include Tab
Customer Portal	<input type="checkbox"/>
Partner Portal	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input type="checkbox"/>
Sales (standard__LightningSales)	<input type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>
Service (standard__Service)	<input type="checkbox"/>
Sales (standard__Sales)	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>
Start Here (Start_Here)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
Site.com (standard__Sites)	<input type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input type="checkbox"/>
Community (standard__Community)	<input type="checkbox"/>
Marketing (standard__Marketing)	<input type="checkbox"/>
Platform (standard__Platform)	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input type="checkbox"/>
Internal Portal User	<input type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Append tab to users' existing personal customizations	

Step 3 of 3

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.

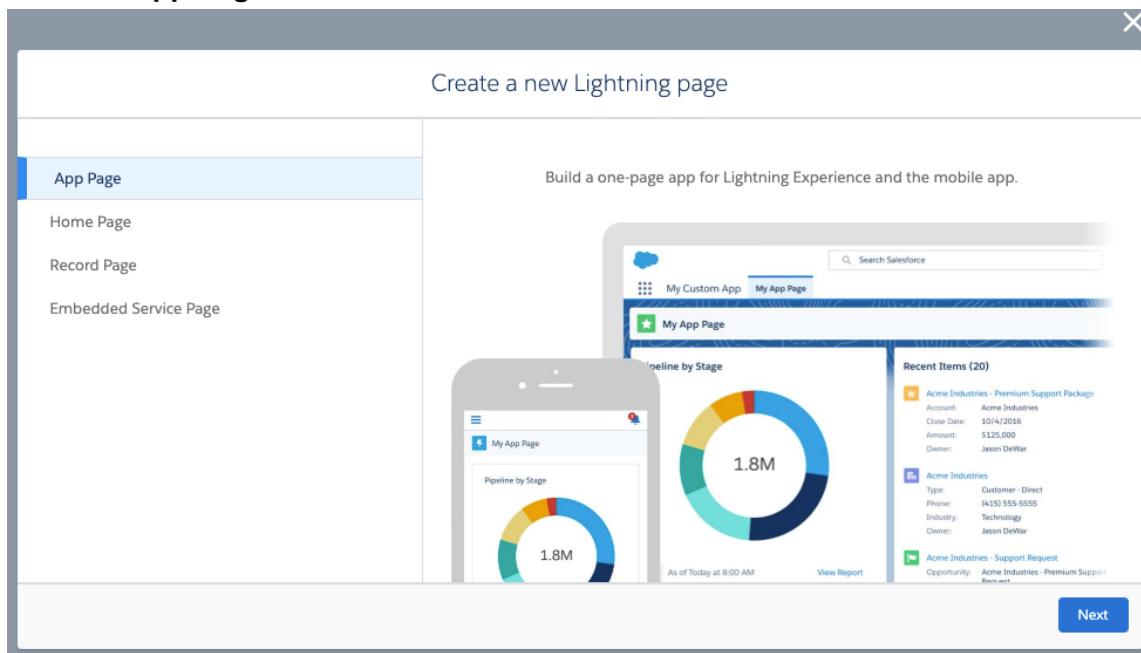
## Create an App Page for the Loot App

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.

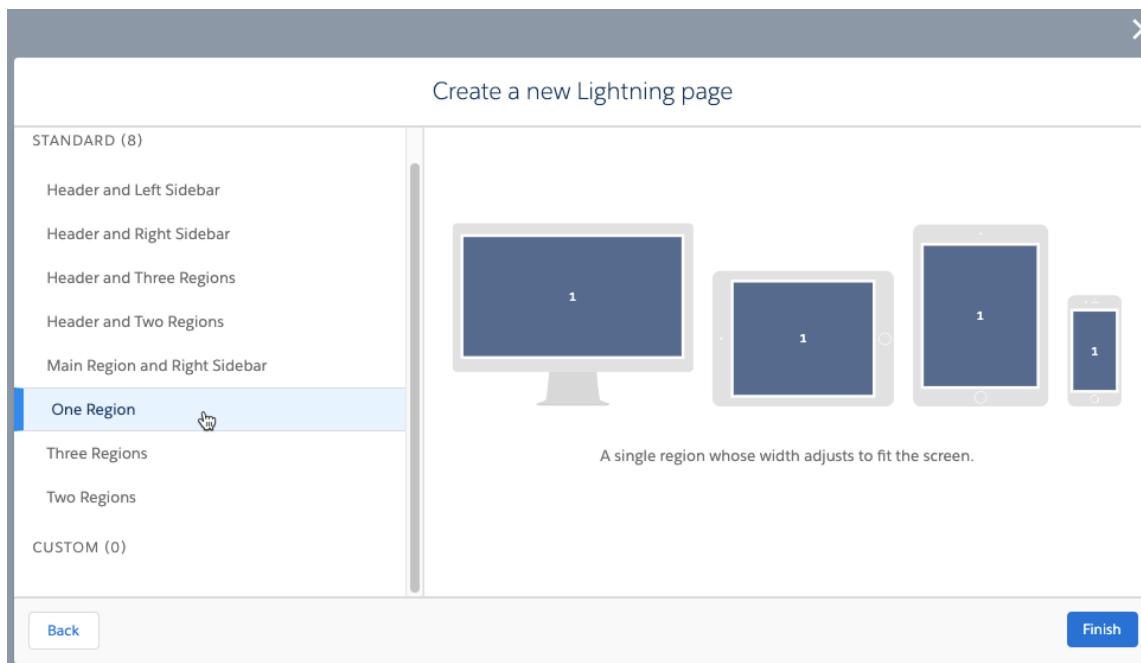
The Loot App will be the landing page for the end users of the Loot App who will be able to participate in a Loot Campaign and select Loot items in a specific preference, all based on how the Campaign is setup by the administrators. There are some custom Lighting Web Components that we have built for 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.

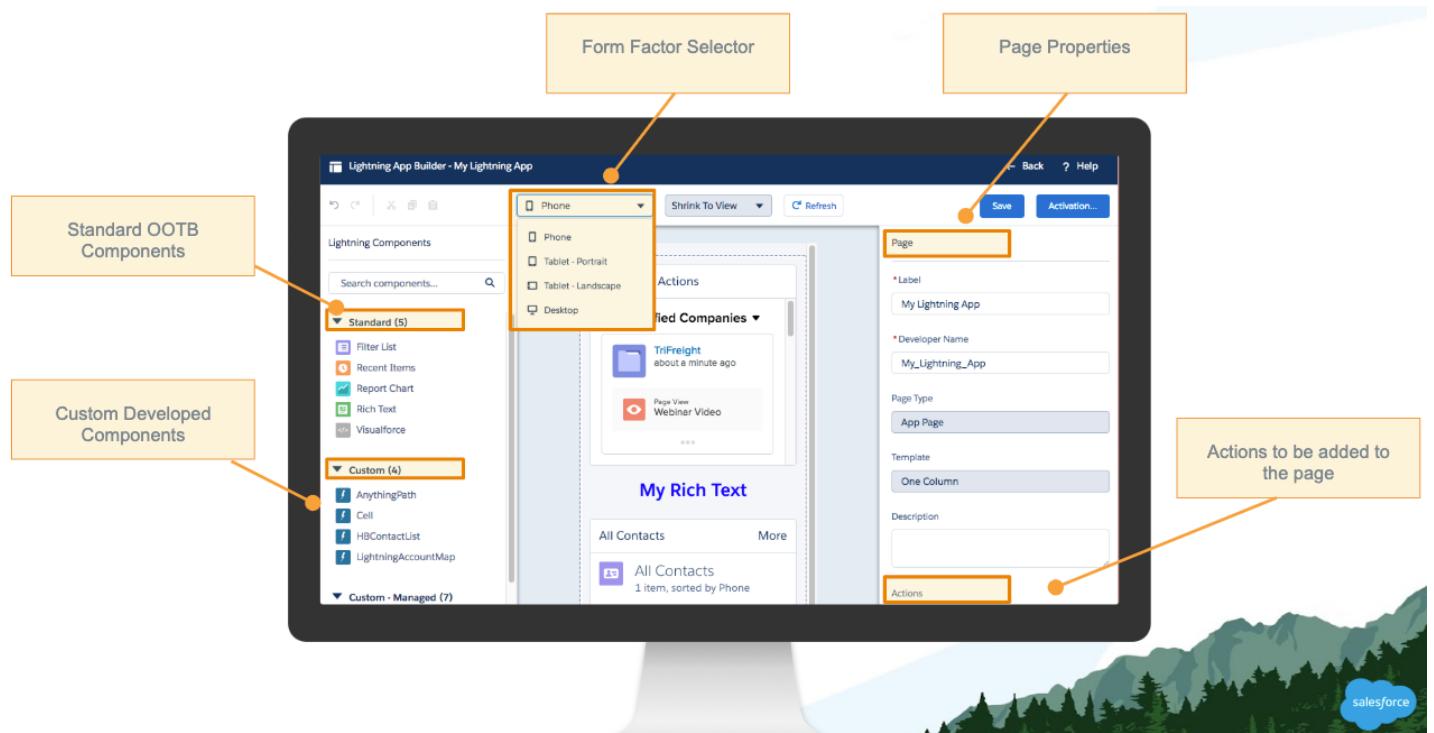
3. Select **App Page** and then click **Next**.



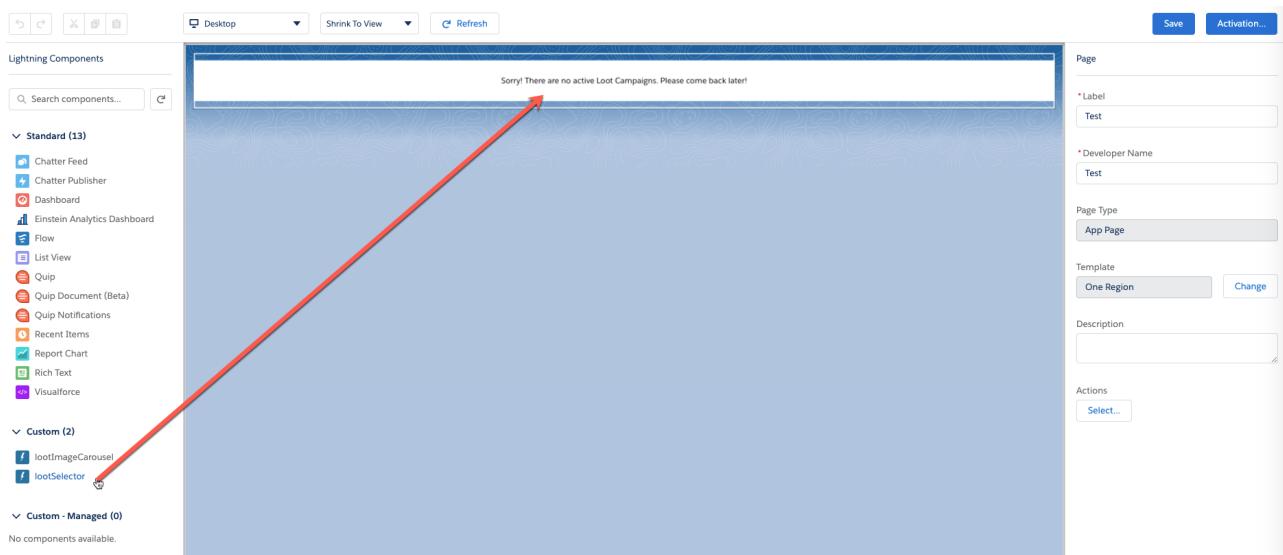
4. On the next screen, enter **Loot** as the page label and click **Next**.  
5. The following screen gives you the option of selecting out of the box as well as custom page templates created by your developers. Select the **One Region** template and click **Finish**.



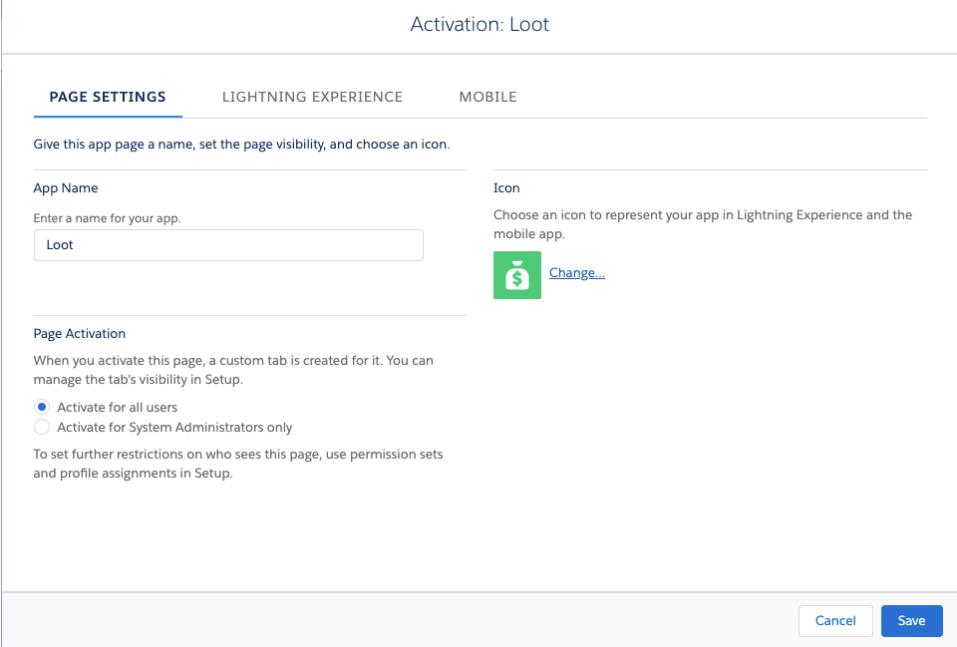
6. The next screen that loads is the Lightning App Builder that allows you to use drag and drop tools to assemble components that appear on the page. Developers can also dynamically make components visible based on either specific user attributes or if a specific record meets certain criterion. Once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



Activation: Loot

PAGE SETTINGS LIGHTNING EXPERIENCE MOBILE

Give this app page a name, set the page visibility, and choose an icon.

App Name

Enter a name for your app.

Loot

Icon

Choose an icon to represent your app in Lightning Experience and the mobile app.

 [Change...](#)

Page Activation

When you activate this page, a custom tab is created for it. You can manage the tab's visibility in Setup.

Activate for all users  
 Activate for System Administrators only

To set further restrictions on who sees this page, use permission sets and profile assignments in Setup.

Cancel Save

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.

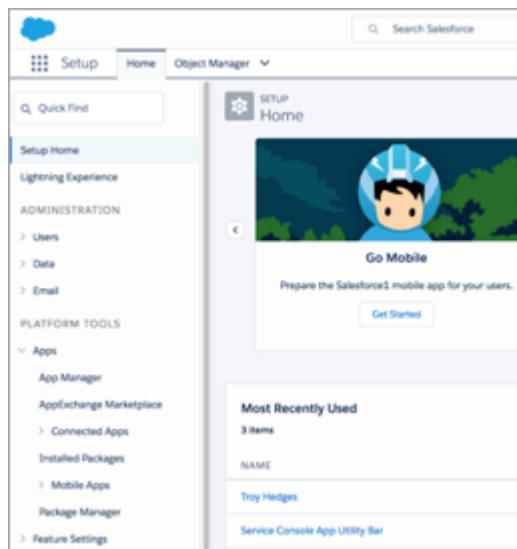


11. Navigate to the **Tabs** section using the **Quick Find** search. You will see the **Loot** tab listed under the **Lightning Pages** tab section. Now onto creating the apps!

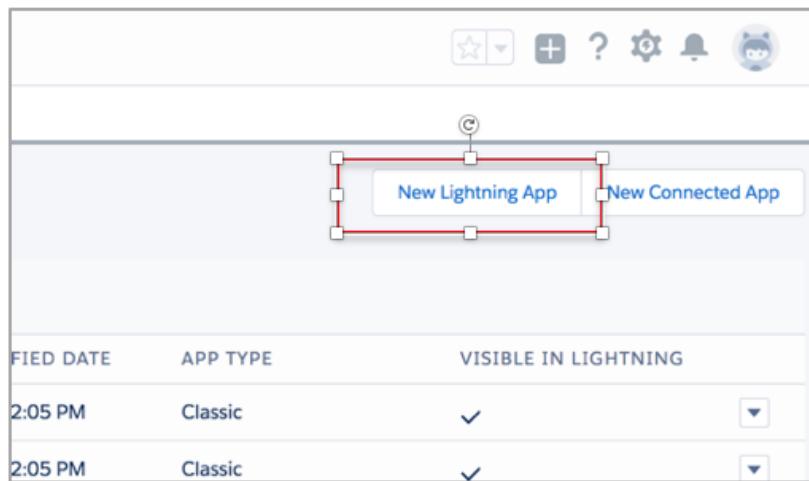
## Create the Loot Administration App

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 as 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:

## App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

**App Details**

\* App Name i

\* Developer Name i

Description i  
 G

**App Branding**

Image i

Primary Color Hex Value  
i #0070D2

Org Theme Options  
 Use the app's image and color instead of the org's custom theme

**App Launcher Preview**

Loot Administration

Parameter	Value
App Name	Loot Administration
Developer Name	Loot_Administration (Auto populates)
Image	Upload the ‘ <b>Loot_Admin_Logo.jpg</b> ’ image from the <b>Salesforce Workshop</b> 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.

New Lightning App

## App Options

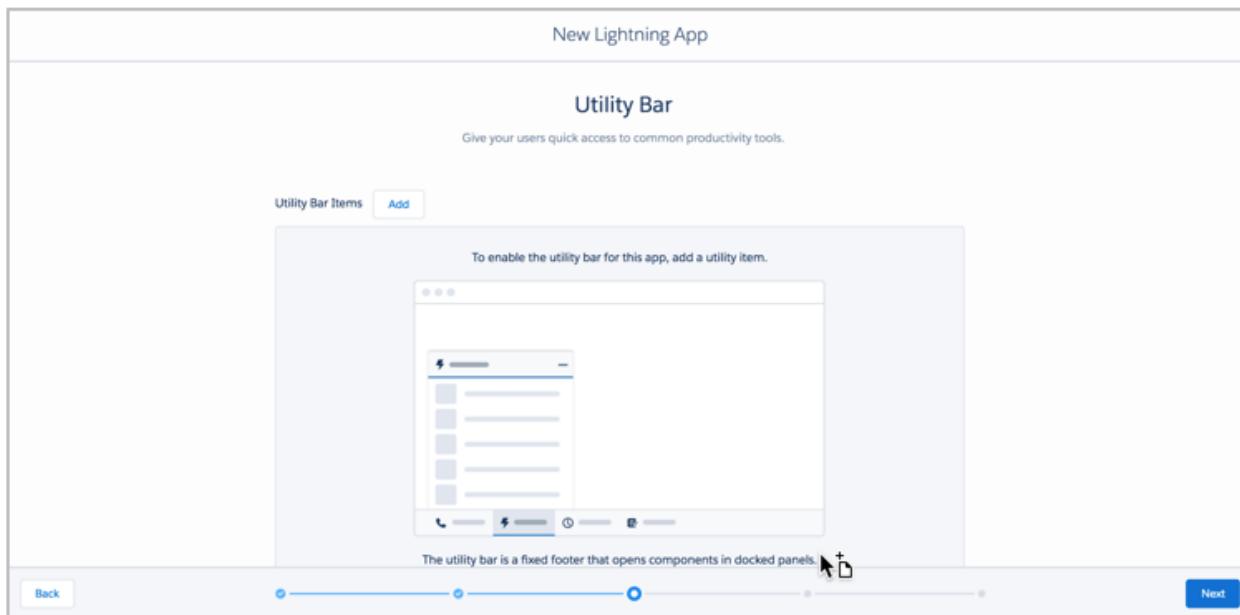
### Navigation and Form Factor i

- \* **Navigation Style**
  - Standard navigation
  - Console navigation
  
- \* **Supported Form Factors**
  - Desktop
  - Phone
  - Desktop and phone

### Setup and Personalization i

- App Personalization Settings**
  - Disable end user personalization of nav items in this app
  - Disable temporary tabs for items outside of this app

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.

#### Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add.

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

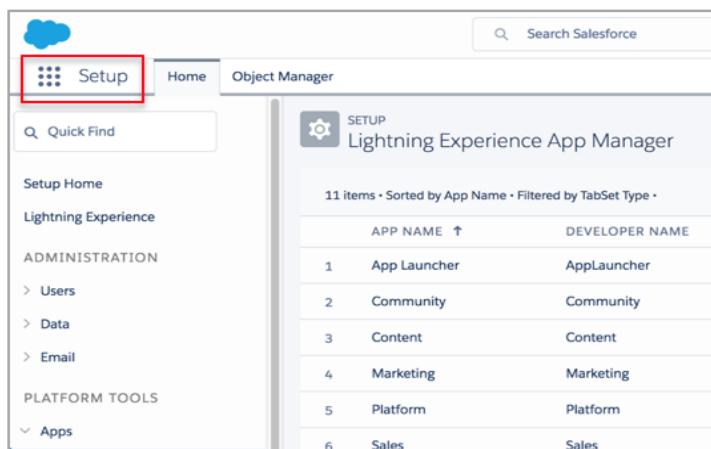
10. You should now see the new **Loot Administration** app on the **App Manager** screen like the following:

The screenshot shows the 'Lightning Experience App Manager' interface. At the top, there are buttons for 'New Lightning App' and 'New Connected App'. Below the header, a table lists 16 items, each representing an app with columns for APP NAME, DEVELOPER NAME, DESCRIPTION, LAST MODIFIED, APP TYPE, and VISIBILITY. The 'Loot Administration' app, which has a developer name of 'Loot\_Administration', is highlighted with a red border. The table has a header row and 16 data rows.

APP NAME ↑	DEVELOPER NAME	DESCRIPTION	LAST MODIFIED	APP T...	VISIBILITY
1 All Tabs	AllTabSet		8/29/2019 4:35 AM	Classic	▼
2 Analytics Studio	Insights	Build Einstein Analytics dashboards and apps	8/29/2019 4:35 AM	Classic	✓ ▾
3 App Launcher	AppLauncher	App Launcher tabs	8/29/2019 4:35 AM	Classic	✓ ▾
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	8/29/2019 4:35 AM	Lightning	✓ ▾
5 Community	Community	Salesforce CRM Communities	8/29/2019 4:35 AM	Classic	✓ ▾
6 Content	Content	Salesforce CRM Content	8/29/2019 4:35 AM	Classic	✓ ▾
7 CPQ Integration User Connected App	CPQIntegrationUserApp		8/29/2019 4:35 AM	Connected	▼
8 Loot Administration	Loot_Administration		9/8/2019 1:28 PM	Lightning	✓ ▾
9 Marketing	Marketing	Best-in-class on-demand marketing automation	8/29/2019 4:35 AM	Classic	✓ ▾
10 Package App	Package_App		9/5/2019 11:35 AM	Lightning	✓ ▾
11 Platform	Platform	The fundamental Lightning Platform	8/29/2019 4:35 AM	Classic	▼
12 Sales	Sales	The world's most popular sales force automation (SFA) solution	8/29/2019 4:35 AM	Classic	▼
13 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	8/29/2019 4:35 AM	Lightning	✓ ▾
14 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	8/29/2019 4:35 AM	Classic	✓ ▾
15 Service	Service	Manage customer service with accounts, contacts, cases, and more	8/29/2019 4:35 AM	Classic	✓ ▾
16 Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application, and manage content and published sites.	8/29/2019 4:35 AM	Classic	✓ ▾

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

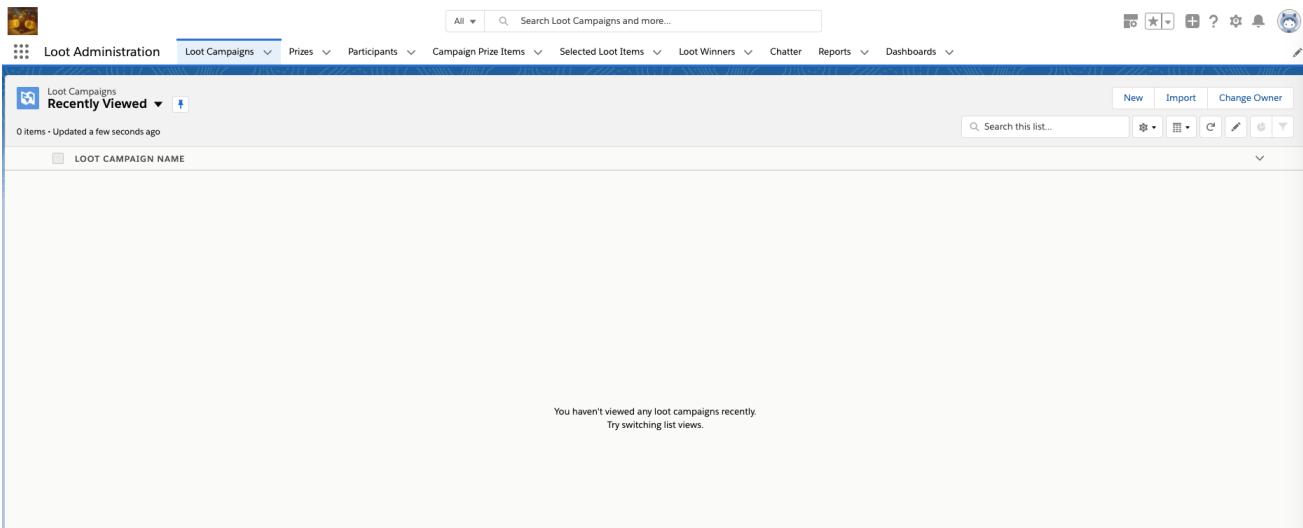
## App Launcher

[Visit AppExchange](#)

## All Apps

 Service Manage customer service with accounts, contacts, cases, and more	 Marketing Best-in-class on-demand marketing automation	 Community Salesforce CRM Communities	 Site.com Build pixel-perfect, data-rich websites using the drag-and-dr...
 Salesforce Chatter The Salesforce Chatter social network, including profiles and feeds	 Content Salesforce CRM Content	 Sales Manage your sales process with accounts, leads, opportunities, and more	 Bolt Solutions Discover and manage business solutions designed for your industry.
 Package App	 Loot Administration		

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

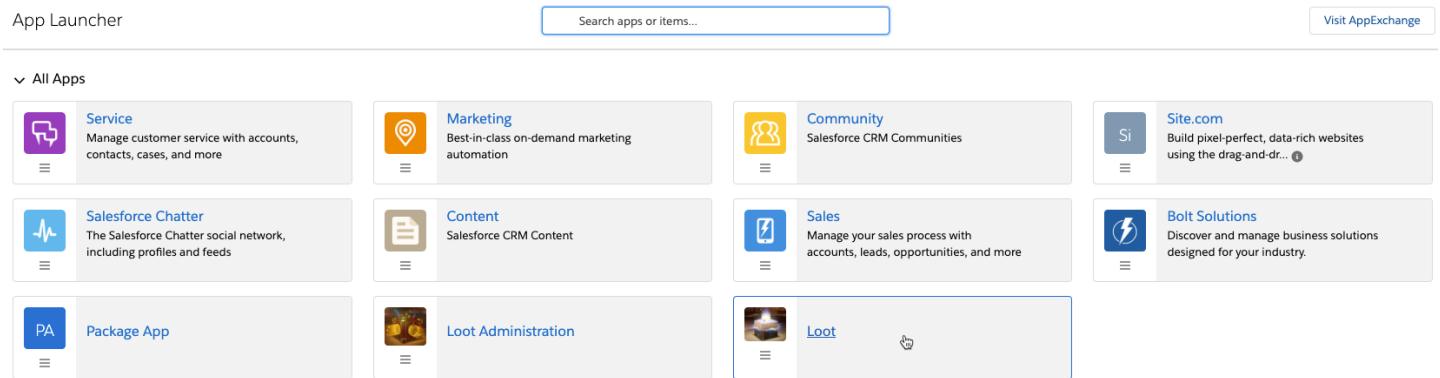


The screenshot shows the Salesforce App Launcher interface. A red box highlights the "Loot Administration" app card, which is the second item in the second row. The card features a small icon of a chest and the text "Loot Administration". Above the cards, there is a search bar with the placeholder "Search apps or items..." and a "Visit AppExchange" button. Below the cards, there is a section titled "Recently Viewed" with a dropdown arrow and a link to "0 items - Updated a few seconds ago". The main content area displays a message: "You haven't viewed any loot campaigns recently. Try switching list views." At the top of the main content area, there is a navigation bar with tabs: "Loot Campaigns", "Prizes", "Participants", "Campaign Prize Items", "Selected Loot Items", "Loot Winners", "Chatter", "Reports", and "Dashboards". On the right side of the main content area, there are standard Salesforce navigation icons: Home, Star, Help, Question Mark, Bell, and a User Profile icon.

## Create the Loot App

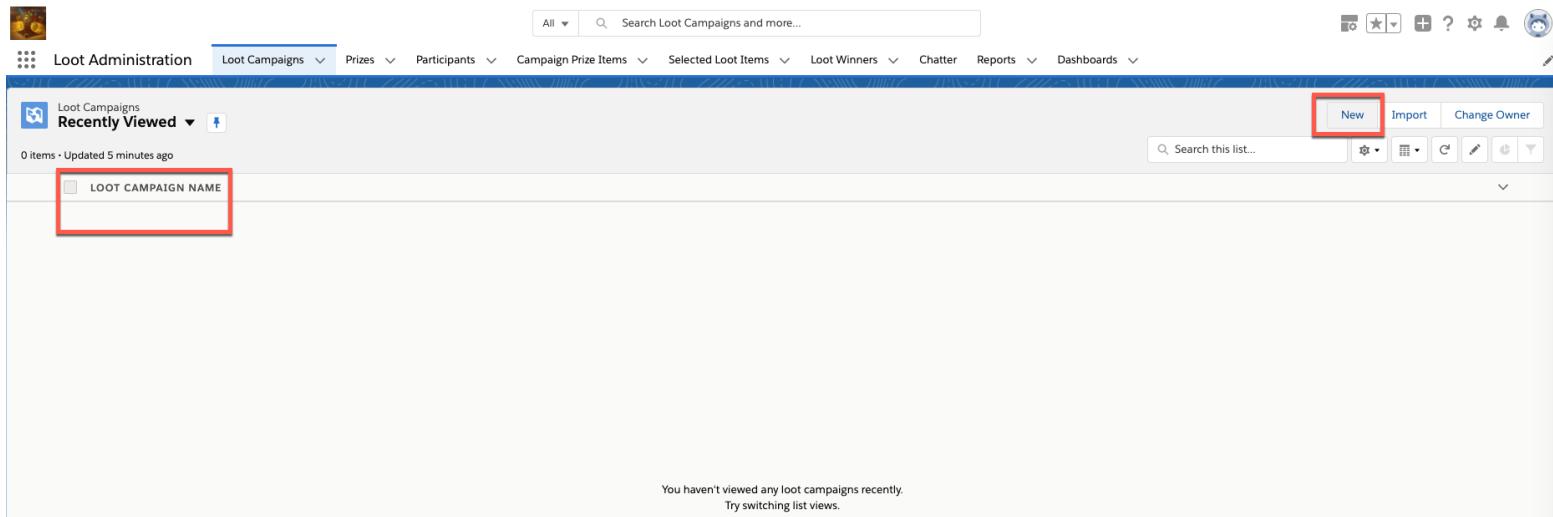
Just like the Loot Administration app, go to the **App Manager** in Setup and create the **Loot** app.

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.

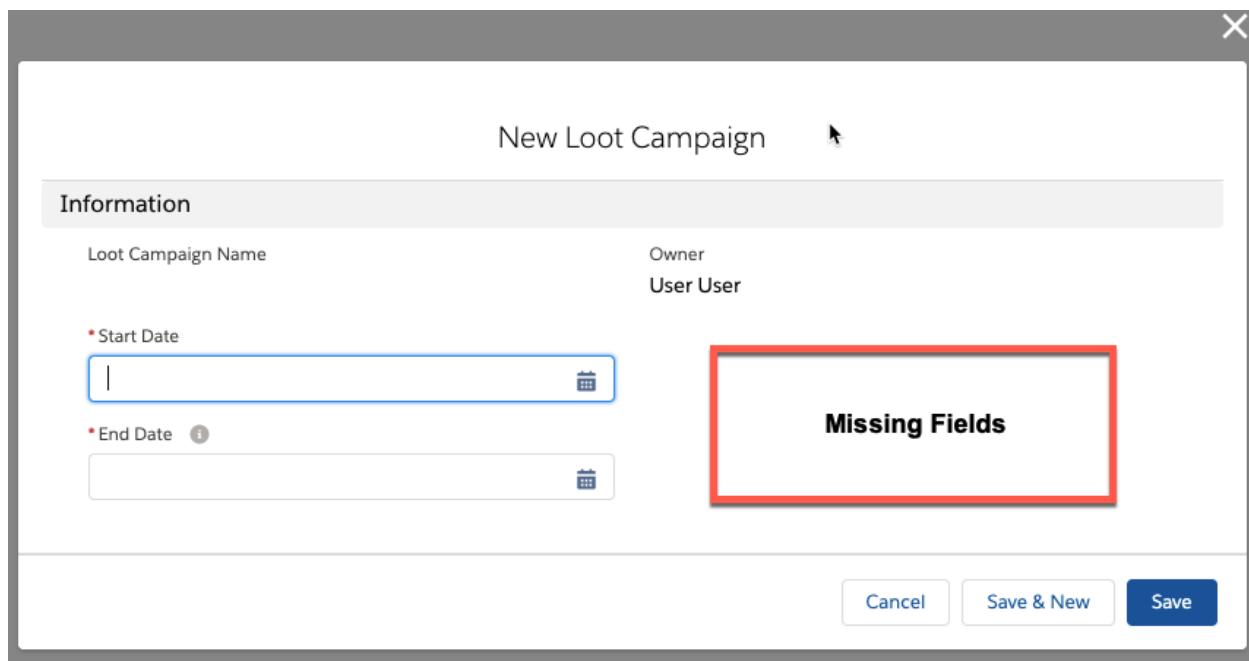


# Lab 3 - Manage Page Layouts and List Views

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.



The screenshot shows the Salesforce App Launcher with the 'Loot Administration' app selected. The 'Loot Campaigns' tab is active, showing the 'Recently Viewed' list view. A red box highlights the 'LOOT CAMPAIGN NAME' field in the list view. Another red box highlights the 'New' button in the top right corner of the list view interface.



New Loot Campaign

Information

Loot Campaign Name      Owner  
User User

\* Start Date

\* End Date

Missing Fields

Cancel   Save & New   Save

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

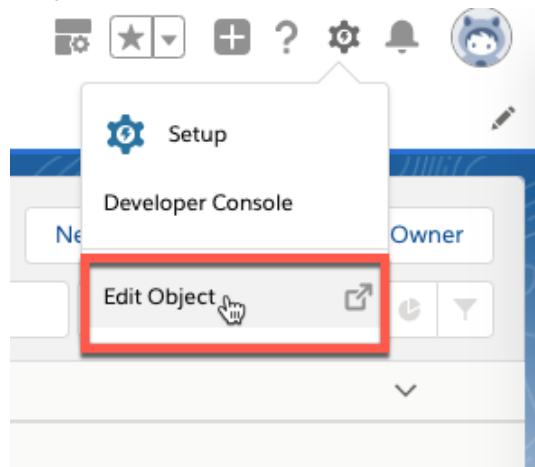
## Modify the Page Layout of the Loot Campaign Object

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.

A screenshot of the Salesforce object details page for 'Loot Campaign'. On the left, there is a sidebar with links: 'Details', 'Fields &amp; Relationships', 'Page Layouts' (which is highlighted with a red box), 'Lightning Record Pages', 'Buttons, Links, and Actions', and 'Compact Layouts'. On the right, under the heading 'Page Layouts', it says '1 Items, Sorted by Page Layout Name'. A table shows one item: 'PAGE LAYOUT NAME' (Loot Campaign Layout). The entire screenshot is framed by a light blue border.

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.

Loot Campaign Layout ▾

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

**Fields**

- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists

Quick Find Field Name

Section	End Date	Region
Blank Space	Last Modified By	Start Date
Active?	Loot Campaign Name	
Created By	Owner	

New Section

Loot Campaign Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic Publisher

Actions in this section are currently inherited from the global publisher layout. You can [override the global publisher layout](#) to set a customized list of actions for the publisher on pages that use this layout.

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. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Loot Campaign Detail

Standard Buttons: Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing | Custom Buttons

Information (Header visible on edit only)

Loot Campaign Name	GEN-2004-001234	Owner	Sample Text
Start Date	9/8/2019		
End Date	9/8/2019		

System Information (Header visible on edit only)

Created By	Sample Text	Last Modified By	Sample Text
------------	-------------	------------------	-------------

Custom Links (Header visible on edit only)

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

Loot Campaign Layout ▾

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

**Fields**

- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists

Quick Find Field Name

Section	End Date	Region
Blank Space	Last Modified By	Start Date
Active?	Loot Campaign Name	
Created By	Owner	

Loot Campaign Sample

Information (Header visible on edit only)

Loot Campaign Name	GEN-2004-001234	Owner	Sample Text
Start Date	9/8/2019	Active?	<input checked="" type="checkbox"/>
End Date	9/8/2019	Region	Sample Text

System Information (Header visible on edit only)

Created By	Sample Text	Last Modified By	Sample Text
------------	-------------	------------------	-------------

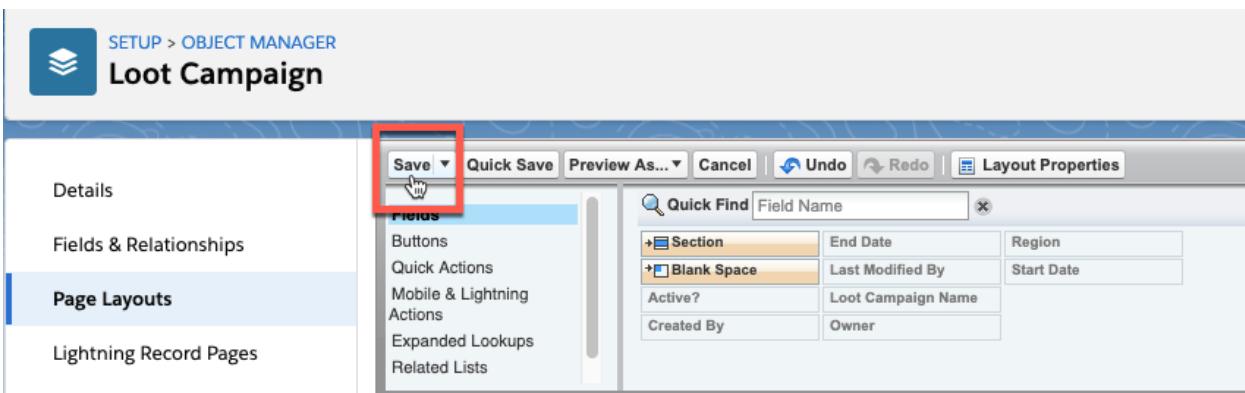
Custom Links (Header visible on edit only)

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**.

The screenshot shows the Salesforce Layout Editor interface. At the top, there are standard toolbar options like Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. Below the toolbar, the left sidebar has sections for Fields, Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, and Related Lists. The 'Related Lists' section is highlighted with a red box. The main content area displays the 'Loot Campaign Detail' page layout. In the 'Related Lists' section of the layout, the 'Campaign Prize Items' list is also highlighted with a red box. The layout includes sections for Information (with fields like Loot Campaign Name, Start Date, End Date), System Information (Created By, Last Modified By), and Custom Links. The bottom part of the layout shows sections for Mobile Cards (Salesforce mobile only) and Related Lists, which include 'Related Lists', 'Files' (not customizable), and 'Loot Campaign History' (not customizable).

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**.

The screenshot shows the 'Related List Properties - Campaign Prize Items' dialog box. The 'Columns' tab is active. On the left, under 'Available Fields', there is a list of fields: Prize: Created Date, Prize: Last Activity Date, Prize: Last Modified Alias, Prize: Last Modified By, Prize: Last Modified Date, Prize: Owner Alias, Prize: Owner Name, and Prize: Prize Image URL. On the right, under 'Selected Fields', there is a list: Campaign Prize Item: Campaign Prize I (highlighted in blue), Prize: Prize Name, and Prize: Prize Image. Between the two lists are 'Add' and 'Remove' buttons. Below the lists, there is a 'Sort By' dropdown set to '--Default--' and radio buttons for 'Ascending' (selected) and 'Descending'. At the bottom, there is a 'Buttons' tab with 'OK', 'Cancel', and 'Revert to Defaults' buttons.



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

New Loot Campaign

Information

Loot Campaign Name	Owner
User User	
* Start Date	Active? <input type="checkbox"/>
9/1/2019 <input type="button" value="Calendar"/>	
* End Date <input type="checkbox"/>	Region
9/30/2019 <input type="button" value="Calendar"/>	West

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

This screenshot shows the Details tab of a Loot Campaign record named 'LC-000000'. The left panel displays basic campaign details: Name (LC-000000), Start Date (9/1/2019), End Date (9/30/2019), and Created By (User User). The right panel shows the Activity and Chatter sections, which are currently empty.

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.

This screenshot shows the Related tab of the same Loot Campaign record. The 'Campaign Prize Items' section is highlighted with a red box around the 'New' button, indicating where a new prize item can be created. The 'Loot Campaign History' section shows one entry for the 'Created' field.

DATE	FIELD	USER	ORIGINAL VALUE	NEW VALUE
9/8/2019 5:55 PM	Created	User User		

## 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.

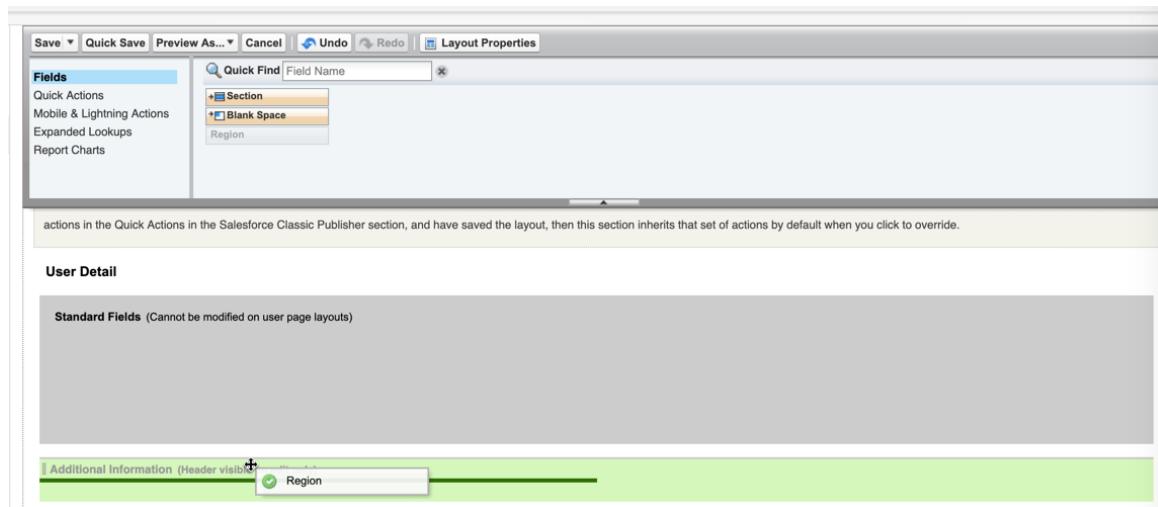
1. Access the **Object Manager** via **Setup** and search for the **Participant** object.
2. Once you click on the **Participant** object, access the **Page Layouts** section and click on **Participant Layouts**.
3. Drag the **Last Prize Win** field to any column of the Information section of the page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

## Add the Region field to the User Page Layout

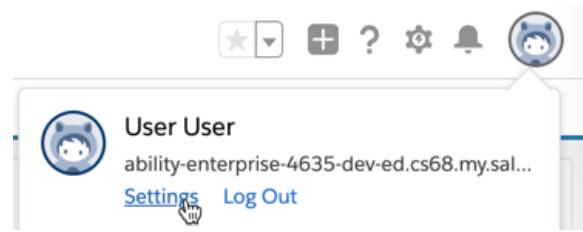
A User in Salesforce is managed as an Object, just like other Standard Objects like Account, Contacts, Opportunities etc and you can extend the user data model the same way you can extend other Standard Objects.

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**.

The screenshot shows the 'Advanced User Details' page in the Salesforce setup. The left sidebar has a section titled 'My Personal Information' with a sub-section 'Advanced User Details' highlighted by a red box. Other options like 'Approver Settings', 'Authentication Settings for External Systems', 'Change My Password', 'Connections', and 'Grant Account Login Access' are also visible.

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.

The screenshot shows the 'Recently Viewed' list view in the 'Loot Campaigns' tab. At the top left, there's a dropdown menu labeled 'Recently Viewed' with a red arrow pointing to a 'Pin list view' button. To the right is a search bar with a red arrow pointing to it. The list itself shows one item: '1 item - Updated a few seconds ago' with a checkbox next to 'LOOT CAMPAIGN NAME' and a link 'LC-000000'. At the top right, there are buttons for 'New', 'Import', and 'Change Owner'.

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.

The screenshot shows the object configuration page for the 'Loot Campaign' object. At the top right, there's a gear icon followed by 'Edit Object', which is highlighted with a red box. Below the header, there's a section for 'ACTIVITY' with buttons for 'New Contact', 'Edit Page', and 'Edit Object'. Further down, there are buttons for 'New Event', 'New Task', 'Log a Call', and 'Email'.

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.

Details	Search Layouts	6 Items, Sorted by Layout	Quick Find
Fields & Relationships	<b>LAYOUT</b>	COLUMNS DISPLAYED	BUTTONS DISPLAYED
Page Layouts	List View	N/A	New, Open in Quip, Accept, Change Owner, Change Owner
Lightning Record Pages	Lookup Dialogs	Loot Campaign Name	N/A
Buttons, Links, and Actions	Lookup Phone Dialogs	Loot Campaign Name	N/A
Compact Layouts	Search Filter Fields	N/A	N/A
Field Sets	Search Results	Loot Campaign Name	N/A
Object Limits	Tab	Loot Campaign Name	N/A
Record Types			
Related Lookup Filters			
<b>Search Layouts</b>			<b>Edit</b>
Triggers			
Validation Rules			

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:

Edit Search Layout  
**Loot Campaign Search Results**

Select the fields to include in this search layout. Note that your choices only determine the display of search results and do not affect the fields that are actually searched. Please refer to the online help for [more information on search fields](#).

Available Fields	Selected Fields
Record ID Owner Alias Owner First Name Owner Last Name Created By Alias Created By Created Date Last Modified By Alias Last Modified By Last Modified Date Last Activity Date	Loot Campaign Name Start Date End Date Region Active?
Add   Remove	Up   Down

Override the search result column customizations for all users

**Standard Buttons**  
There are no customizable standard buttons for this view.

**Custom Buttons**  
[Click here to create a new custom list button](#)

**Save** **Cancel**

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.

<b>List Name</b>	West Region Campaigns
<b>List API Name</b>	West_Region_Campaigns
<b>Who sees this list view?</b>	<input type="radio"/> Only I can see this list view <input checked="" type="radio"/> All users can see this list view <input type="radio"/> Share list view with groups of users
<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

- Your screen will now look like the following.

The screenshot shows the 'Package App' interface with the 'Loot Campaigns' tab selected. The main area displays a single item: 'LC-000000'. On the right, there's a 'Filters' sidebar with a single entry: 'Filter by Owner: My loot campaigns'.

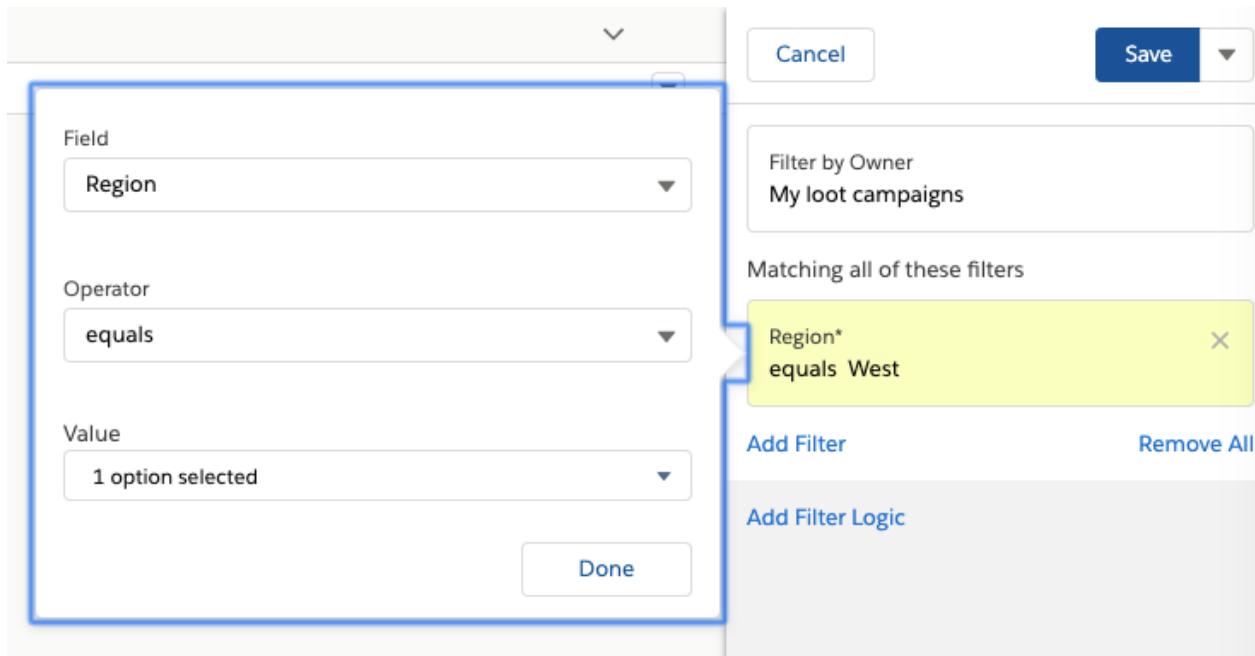
- Let's change the 'Filter by Owner' filter to look at requests logged by all users in our custom list view. Click on the 'Filter by Owner' tile and select 'All loot campaigns' and click 'Done'.

The image shows two overlapping modal dialogs. The left dialog is titled 'Filter by Owner' and contains three radio button options: 'All loot campaigns' (selected), 'My loot campaigns', and 'Queue owned loot campaigns'. The right dialog is titled 'Filters' and shows the selected filter: 'Filter by Owner: All loot campaigns'. It also includes 'Add Filter' and 'Remove All' buttons.

- 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.

The screenshot shows a list view titled 'Loot Campaigns' with a filter applied for 'West Region Campaigns'. A green banner at the top right says 'List view updated.' A red box highlights the funnel icon on the right side of the header. The list view table has columns: LOOT CAMPAIGN NAME, START DATE, END DATE, REGION, and ACTIVE?. One item is listed: 'LC-00000' with start date '9/1/2019', end date '9/30/2019', region 'West', and active status checked. To the right of the table is a 'Filters' sidebar with the applied filter 'Region equals West' and links for 'Add Filter' and 'Remove All'.

## 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.

NAME	DEVELOPER NAME	DESCRIPTION	LAST MODIFIED	THEME TYPE	ACTIVE
Lightning Lite	LightningLite	A streamlined, white-background desi...	Oct 31, 2017	Salesforce	▼
Lightning Blue	Lightning	The sky's the limit with Salesforce's sig...	Oct 31, 2017	Salesforce	✓
Cloudy Sky	CloudySky	Misty sea-green and gray mingle in thi...	Oct 31, 2017	Salesforce	▼
Lightning Ridge	LightningRidge	Majestic blue ridges dominate this dre...	Oct 31, 2017	Salesforce	▼
Codey Canyon	CodeyCanyon	Sinuous red rocks recall the Western la...	Oct 31, 2017	Salesforce	▼
Einstein Relativity	EinsteinRelativity	An atmospheric blue-green theme cel...	Oct 31, 2017	Salesforce	▼
Seasonal Flair	Seasonal	Go with the flow! Our seasonal theme ...	Oct 31, 2017	Salesforce	▼

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

NAME	DEVELOPER NAME	DESCRIPTION	LAST MODIFIED	THEME TYPE	ACTIVE
Lightning Lite	LightningLite	A streamlined, white-background desi...	Oct 31, 2017	Salesforce	▼
Lightning Blue	Lightning	The sky's the limit with Salesforce's sig...	Oct 31, 2017	Salesforce	✓
Cloudy Sky	CloudySky	Misty sea-green and gray mingle in thi...	Oct 31, 2017	Salesforce	▼
Lightning Ridge	LightningRidge	Majestic blue ridges dominate this dre...	Oct 31, 2017	Salesforce	▼
Codey Canyon	CodeyCanyon	Sinuous red rocks recall the Western la...	Oct 31, 2017	Salesforce	▼
Einstein Relativity	EinsteinRelativity	An atmospheric blue-green theme cel...	Oct 31, 2017	Salesforce	▼
Seasonal Flair	Seasonal	Go with the flow! Our seasonal theme ...	Oct 31, 2017	Salesforce	▼

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:

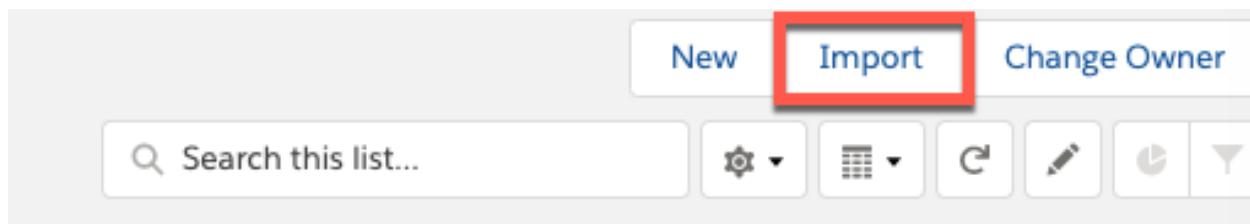
- Only one theme can be active at a time, and a theme applies to your entire org.
- By default, orgs use the built-in Lightning Blue theme.
- You can create up to 300 custom themes, but you can't modify or clone the built-in themes provided by Salesforce.
- Themes don't apply to Salesforce Classic or 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.

A screenshot of the Data Import Wizard screen. At the top, there are three tabs: 'Choose data' (selected), 'Edit mapping', and 'Start import'. The main area is titled 'Import your Data into Salesforce' with a note 'You can import up to 50,000 records at a time.' and a 'Help for this page' link. On the left, under 'What kind of data are you importing?', 'Prizes' is selected. In the center, under 'What do you want to do?', 'Add new records' is selected. Under 'Match by:', 'Name' is chosen. Under 'Which User field in your file designates record owners?', '--None--' is selected. Under 'Trigger workflow rules and processes?', the checkbox is unchecked. On the right, under 'Where is your data located?', a file named 'Prize.csv' is selected from the 'Salesforce Workshop' folder. The file type is 'CSV', character code is 'ISO-8859-1 (General US & Western European, ISO-LATIN-1)', and values are separated by 'Comma'. A green checkmark is present next to the file selection.

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.

Edit Field Mapping: Prizes  
Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

[Help for this page](#)

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Prize Name	Name	Steam Gift Card	PS4	Gaming Mouse
Change	Prize Image URL	Prize Image URL	https://media.xogrp.c	https://pbs.twimg.com	https://imgcache.dealmoon.com/img.dealmoon.com/images/c/15/07/10/559fcdb10dcf4.jpg_3

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.

The screenshot shows the Bulk Data Load Jobs page. At the top, there's a header with a gear icon labeled 'SETUP' and 'Bulk Data Load Jobs'. Below it, a sub-header says 'Bulk Data Load Job 7501D000001USyX' with a 'Help for this Page' link. The main content area is titled 'Bulk Data Load Job Detail' with a 'Reload' button. It displays various job details:

- Job ID: 7501D000001USyX
- Submitted By: User User
- Start Time: 9/9/2019 8:29 AM PST
- End Time: 9/9/2019 8:29 AM PST
- Time to Complete (hh:mm:ss): 00:18
- Object: Prize
- External ID Field: Name
- Content Type: CSV
- Concurrency Mode: Parallel
- API Version: 46.0

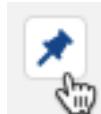
On the right, there's a 'Job Status' section with columns for Status, Total Processing Time (ms), API Active Processing Time (ms), Apex Processing Time (ms), and Status. The status is 'Closed' with values 311, 247, 0, and 'Completed' respectively. A note says 'Job progress, Records processed and failed' with a red arrow pointing to a box containing Failed Batches: 0, Progress: 100%, Records Processed: 6, and Records Failed: 0. Another red arrow points to the 'Status' column in the 'Job Status' section.

At the bottom, there's a 'Batches' section with a table:

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
<a href="#">View Request</a>	<a href="#">View Result</a>	7511D000001ielg	9/9/2019 8:29 AM	9/9/2019 8:29 AM	311	247	0	6	0	0	<a href="#">Completed</a>	

A red box highlights the 'View Request' and 'View Result' links in the 'Batches' table, and another red box highlights the 'Completed' status in the 'Status' column.

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.

	PRIZE NAME	PRIZE IMAGE	CREATED BY	CREATED DATE
1	Gaming Headphone		User User	9/9/2019 8:29 AM
2	Gaming Keyboard		User User	9/9/2019 8:29 AM
3	Gaming Mouse		User User	9/9/2019 8:29 AM
4	PS4		User User	9/9/2019 8:29 AM
5	Steam Gift Card		User User	9/9/2019 8:29 AM
6	XBOX		User User	9/9/2019 8:29 AM

## 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.

The screenshot shows the 'Loot Administration' page with the 'Loot Campaigns' tab selected. A specific 'Loot Campaign' record is displayed, identified by the ID 'LC-000001'. The 'Related' tab is highlighted with a red box. The 'Details' tab is also visible. The campaign details include:

- Loot Campaign Name: LC-000001
- Start Date: 9/1/2019
- End Date: 9/30/2019
- Created By: User User, 9/9/2019 8:45 AM
- Owner: User User
- Active?:
- Region: West
- Last Modified By: User User, 9/9/2019 8:45 AM

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

Loot Campaign  
LC-000001

**Related** Details

**Campaign Prize Items (0)**

**Files (0)** Add Files

Upload Files  
Or drop files

**Loot Campaign History (1)**

DATE	FIELD	USER	ORIGINAL VALUE	NEW VALUE
9/9/2019 8:45 AM	Created.	User User		

[View All](#)

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.)

New Campaign Prize Item

**Information**

\* Campaign Prize Item Name  
PS4

\* Campaign  
LC-000001

\* Prize  
PS4

[Cancel](#) [Save & New](#) **Save**

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.

CAMPAIGN PRIZE ITEM: CAMPAIGN PRIZE ITEM N...	PRIZE NAME	PRIZE IMAGE
PS4	PS4	
XBOX	XBOX	

#### 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.

Campaign Prize Items Recently Viewed

2 items · Updated 2 minutes ago

	CAMPAIGN PRIZE ITEM NAME
1	XBOX
2	PS4

- 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

- 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

- 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.

The screenshot shows the Salesforce Object Manager interface for the 'Loot Campaign' object. On the left, there's a sidebar with various configuration options like Details, Fields & Relationships, Page Layouts, etc. The 'Validation Rules' section is highlighted with a red box. At the top right of the main content area, there's a 'New' button, which is also highlighted with a red box. The main content area displays a table for Validation Rules, showing columns for Rule Name, Error Location, Error Message, Active status, and Modified By. A note at the bottom of the table says 'No items to display.'

4. The validation rule configuration window will open.

The screenshot shows the 'Request Validation Rule' configuration window. It includes fields for Rule Name ('Discount\_Percent\_c>0.30'), Active status (checked), Description, Error Condition Formula ('Discount\_Percent\_c>0.30'), Functions dropdown (showing ABS, ADDMONTHS, AND, BEGINS, BLANKVALUE, BR), Insert Field and Insert Operator buttons, and a Check Syntax button. The Error Message field contains 'Discount percent cannot exceed 30%'. A tooltip for the ABS function is visible, explaining it returns the absolute value of a number.

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

Parameter	Value
Rule Name	Date_Validation
Active	<i>Make sure to keep this selected/checked.</i>
Description	Validate that the end date for a Loot Campaign is greater than the start date
Condition Formula	<p>End_Date__c &lt; Start_Date__c  <b>NOTE:</b> When writing a validation rule, your condition formula should return “true” for your false condition.</p>
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 -

The screenshot shows the 'Validation Rule Edit' interface. At the top, there are three buttons: 'Save', 'Save & New', and 'Cancel'. The 'Rule Name' field contains 'Date\_Validation'. The 'Active' checkbox is checked. The 'Description' field contains the text: 'Validate that the end date for a Loot Campaign is greater than the start date'. In the 'Error Condition Formula' section, the formula 'End\_Date\_\_c < Start\_Date\_\_c' is entered. A dropdown menu titled 'Functions' is open, showing options like ABS, ADDMONTHS, AND, BEGINS, BLANKVALUE, BR, and ABS(number). The 'Error Message' section contains the message 'Please make sure the end date is greater than the start date'. The 'Error Location' section indicates the formula will appear at the 'Top of Page'. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

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

Rule Name	Date_Validation	Active
Error Condition Formula	End_Date__c < Start_Date__c	<input checked="" type="checkbox"/>
Error Message	Please make sure the end date is greater than the start date	
Description	Validate that the end date for a Loot Campaign is greater than the start date	
Created By	User User, 9/9/2019 2:42 PM	
Modified By	User User, 9/9/2019 2:42 PM	

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

Loot Campaign Name: LC-000000

Related Details

Loot Campaign Name: LC-000000

Owner: User User

\* Start Date: 10/11/2019

\* End Date: 9/30/2019

Please make sure the end date is greater than the start date

Created By: User User, 9/8/2019 5:55 PM

Modified By: User User, 9/8/2019 5:55 PM

Review the following fields

- End Date

Cancel Save

## 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** checkbox 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.

The screenshot shows the Salesforce Setup interface with the 'Email Alerts' search term entered in the quick find bar. The 'Email Alerts' section is selected under 'Workflow Actions'. The main area displays a table for 'All Email Alerts' with one entry: 'Loot Campaign Alert' (Action: Edit | Del, Description: Loot Campaign Alert, Email Template Name: Loot Campaign Email Template). The table includes columns for Action, Description, Email Template Name, Object, and Last Modified Date (9/9/2019).

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

**SETUP**

## Classic Email Templates

Custom Email Template  
**Loot Campaign Email Template** Help for this Page

Preview your email template below.

**Email Template Detail**

Folder	Blizzards Templates	Available For Use
Email Template Name	Loot Campaign Email Template	<input checked="" type="checkbox"/>
Template Unique Name	Loot_Campaign_Email_Template	Last Used Date
Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)	Times Used
Author	User User [Change]	
Description		Modified By
Created By	User User, 9/5/2019 11:35 AM	User User, 9/5/2019 11:35 AM

[Edit Properties](#) [Edit HTML Version](#) [Edit Text Version](#) [Delete](#) [Clone](#)

[Edit Properties](#) [Edit HTML Version](#) [Edit Text Version](#) [Delete](#) [Clone](#)

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**Email Template**

[Send Test and Verify Merge Fields](#)

Subject : Loot Campaign for ((case(month(today)),1,'January',2,'February',3,'March',4,'April',5,'May',6,'June',7,'July',8,'August',9,'September',10,'October',11,'November',12,'December')) is now Live!

**HTML Preview**



**Plain Text Preview**

[Click HERE to opt in for Loot!](#)

Step 1: Follow the link, then drag & drop your selections into the opt-in window.  
%3Fisdtm%3Dn1%27;

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.

The screenshot shows the 'Custom Email Template Edit' interface. At the top left is a blue envelope icon labeled 'SETUP'. To its right is the title 'Classic Email Templates'. On the far right is a link 'Help for this Page' with a question mark icon.

The main area is titled 'Loot Campaign Email Template'. Below it is a note: 'Paste the HTML code for your custom HTML email in the box below. Use merge fields to personalize your email content. If the text version of the template is left blank, this version will be stripped of HTML and sent as the text version.'

A red box highlights the 'Available Merge Fields' section, which contains a table with three columns: 'Select Field Type', 'Select Field', and 'Copy Merge Field Value'. The 'Select Field Type' dropdown is set to 'Object'. The 'Select Field' dropdown is set to 'Start Date'. The 'Copy Merge Field Value' field contains '{!Loot\_Campaign\_c.Start\_Date\_\_c}'. A red arrow points from this section to the text 'Object Merge Fields to insert into HTML or Text Content'.

Below this is a 'HTML Email Content' section. It has a 'Save' button, a 'Preview' button, and a 'Cancel' button. A red box highlights the 'Subject' field, which contains 'Loot Campaign for {case(month(today()),1,"January",2,"February",3,"March",4}'. A red arrow points from this field to the text 'Formulas to display data can also be used similar to Formula fields'.

The 'HTML Body' section contains the actual HTML code for the email body. A red arrow points from this code to the text 'HTML Content'.

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.

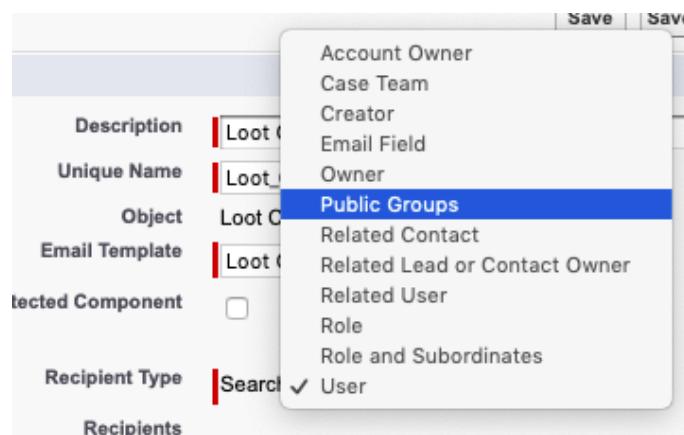
If you have questions, please email xyz@blizzard.com

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.

The screenshot shows the 'Edit Email Alert' interface. At the top, there are buttons for Save, Save & New, and Cancel. Below that, the 'Edit Email Alert' section includes fields for Description (Loot Campaign Alert), Unique Name (Loot\_Campaign\_Alert), and Email Template (Loot Campaign Email Te). A red box highlights the 'Email Template' field, with a red arrow pointing to it labeled 'Email template selection'. Another red box highlights the 'Recipient Type' dropdown, with a red arrow pointing to it labeled 'Recipient Type Selector'. The 'Recipients' section shows an 'Available Recipients' list containing 'User: Integration User', 'User: Security User', and 'User: User User'. An 'Add' button is next to the list, and a 'Selected Recipients' box contains 'Loot Campaign Owner'. Below this, a note says 'You can enter up to five (5) email addresses to be notified.' and there's a 'Additional Emails' input field. The bottom section is titled 'Choose From Email Address' and includes a 'From Email Address' dropdown set to 'Current User's email address'. A red box highlights the 'From Email Address' dropdown, with a red arrow pointing to it. There's also a checkbox for 'Make this address the default From email address for this object's email alerts.' At the bottom are Save, Save & New, and Cancel buttons.

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:

The screenshot shows the Salesforce Process Builder interface. At the top, there is a navigation bar with icons for Setup, Home, Object Manager, and a search bar labeled 'Search Setup'. To the right of the search bar are various user and system status icons. Below the navigation bar, the main title is 'Process Builder' with a back link '← Back To Setup' and help links '? Help'. Underneath the title, there is a section titled 'My Processes' with a blue diamond icon and '0 items'. A 'New' button is located to the right of this section. The main content area has a heading 'Welcome to the Process Builder!'. It includes a brief introduction: 'With the Process Builder you can easily automate everything from daily tasks, like approvals and follow-up emails, to more complex processes, like order renewals and new-hire onboarding. Click "New" above to get started.' Below this, there are three links: 'Learn More', 'Using the Process Builder (documentation)', 'Process Builder Overview (video)', and 'Learn about the Process Builder using an interactive learning path called Trailhead'. To the right of the introduction, there is a large callout box with the text: 'It takes only a few clicks to: Select your object An opportunity, for example. Define your criteria Let's start this process when the opportunity's stage is Closed - Won and its amount is greater than \$500,000. Choose what to automate Let's create a contract and associate it with the opportunity's account, congratulate the owner by posting to the Sales Chatter group, and create a follow-up task scheduled to execute six days after the opportunity's close date. Activate the process You're done!' The entire interface is set against a light gray background with dark blue header bars and white text.

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:

It takes only a few clicks to: X

### New Process

Process Name \* API Name \* ⓘ

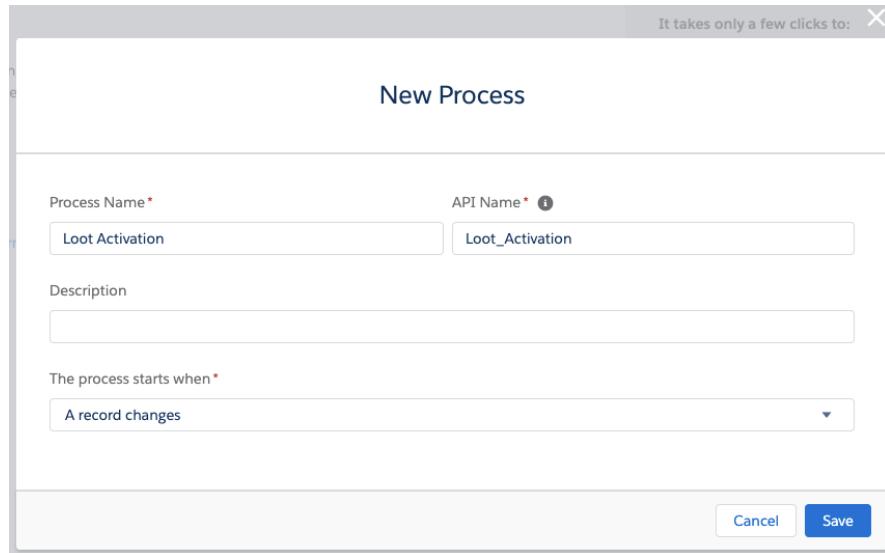
Loot Activation Loot\_Activation

Description

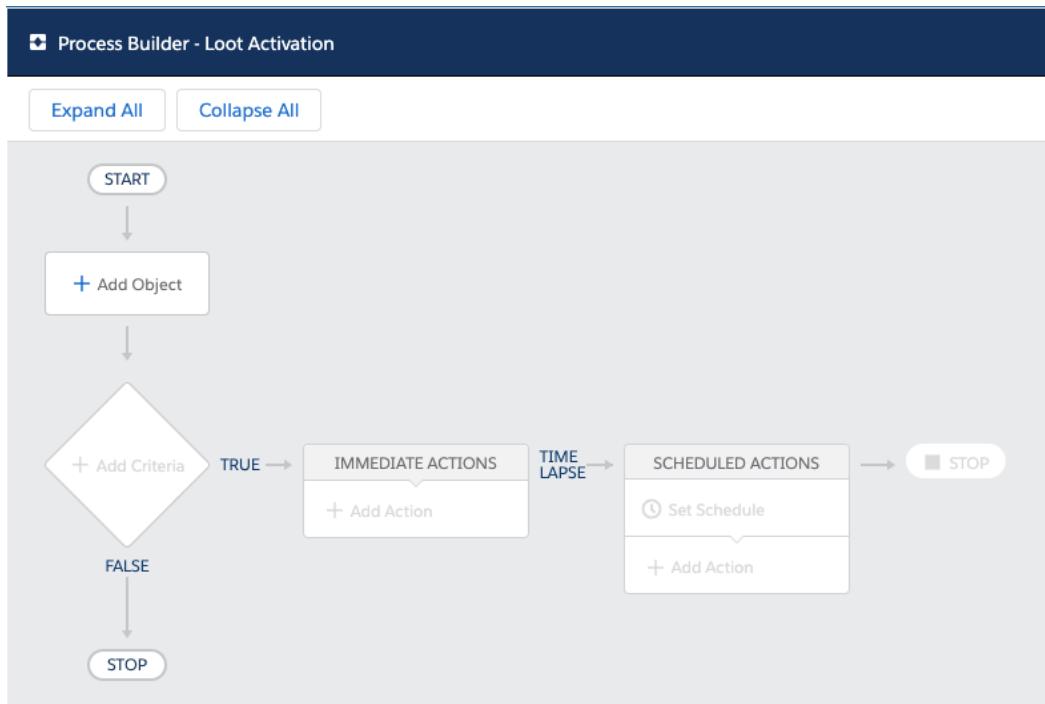
The process starts when \*

A record changes

Cancel Save



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:

Choose Object and Specify When to Start the Process

Object \* ⓘ  
Loot Campaign

Start the process \*  
 only when a record is created  
 when a record is created or edited

> Advanced

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	<i>Do not change</i>

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	<i>Create a rule: [Loot_Campaign__c.Active__c] Equals [Boolean] [True]</i>
Conditions	All of the conditions are met (AND)
Advanced	<i>Do not change</i>

Your window should look like the following

Define Criteria for this Action Group

Criteria Name \* ⓘ  
**Is Campaign Active?**

Criteria for Executing Actions \*  
 Conditions are met  
 Formula evaluates to true  
 No criteria—just execute the actions!

Set Conditions

Field *	Operator *	Type *	Value *
1 [Loot_Campaign... Q	Equals	Boolean	True

+ Add Row

Conditions \*  
 All of the conditions are met (AND)  
 Any of the conditions are met (OR)  
 Customize the logic

> Advanced

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:

## Select and Define Action



Action Type \*

Email Alerts

Action Name \* ⓘ

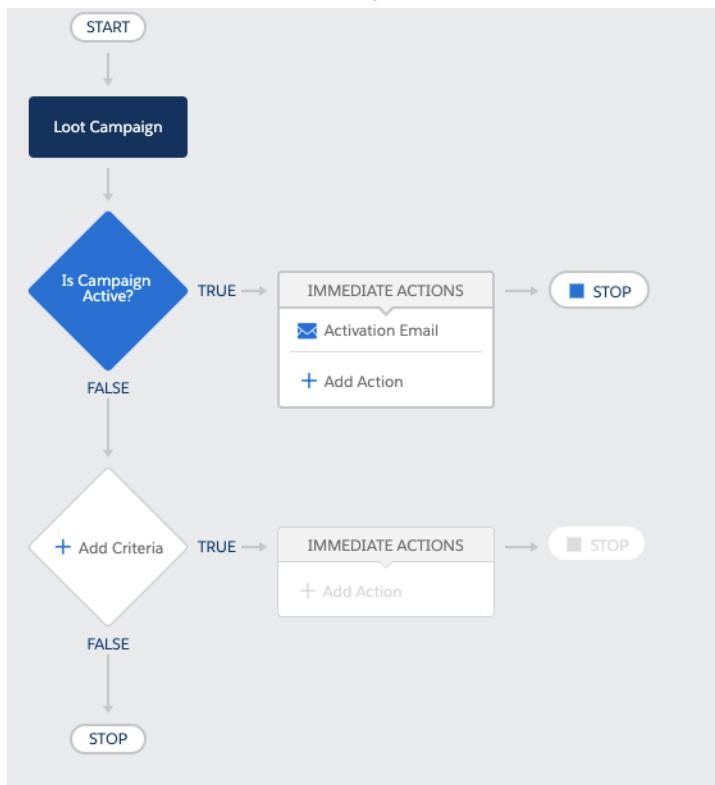
Activation Email

Email Alert \*

Loot\_Campaign\_Alert

Select an existing email alert for the object that this process is associated with. If none exist, [create one](#).

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.

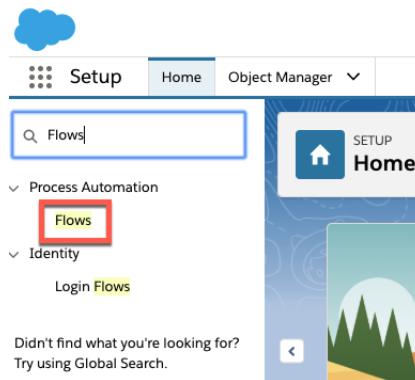


17. One last step is needed for this process. Click the **Activate** button in upper-right. Click **Confirm** on the pop-up window.
18. Let's test the process. Navigate to the Loot Campaign Record and edit the Loot Campaign record you created earlier so that the '**Active?**' checkbox is checked. If 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**.

View: All Flows		Edit   Create New View		New Flow	
Action	Flow Label	Description	Last Modified By	Last Modified Date	Is Active
Open   Edit	Get Campaign Winner	Abhishek Chaturvedi	Abhishek Chaturvedi	9/12/2019 12:20 PM	✓

Paused and Waiting Interviews

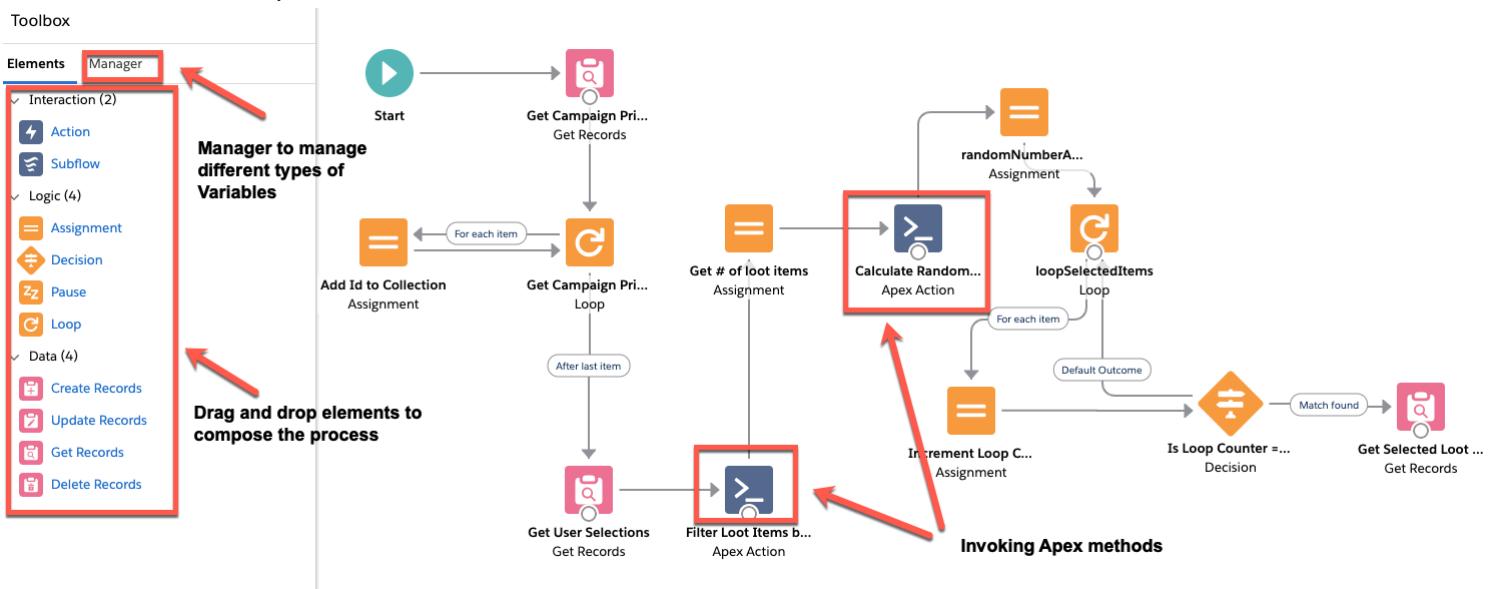
3. You will see the details of the Flow. A flow can have multiple versions. Only one version of a flow can be active at a time. Note the **Type** property of the flow. This is an Autolaunched Flow, which means that it has no visual components and runs as a background process. Also note the **URL** property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

Flow Detail		Flow Versions	
Action	Flow Label	Version	Description
Edit	Get Campaign Winner	1	Built with Flow Builder
Open	/flow/Get_Campaign_Winner		Created Date 9/12/2019 11:38 AM
Run			Modified By Abhishek Chaturvedi, 9/12/2019 11:39 AM
Delete			

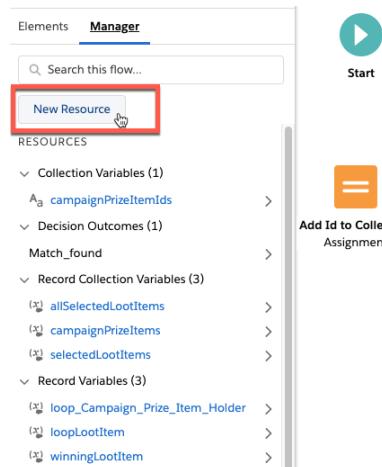
5. Clicking on Open will redirect you to the Flow Builder screen. Take a few minutes to observe the components of the Flow.

- 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.

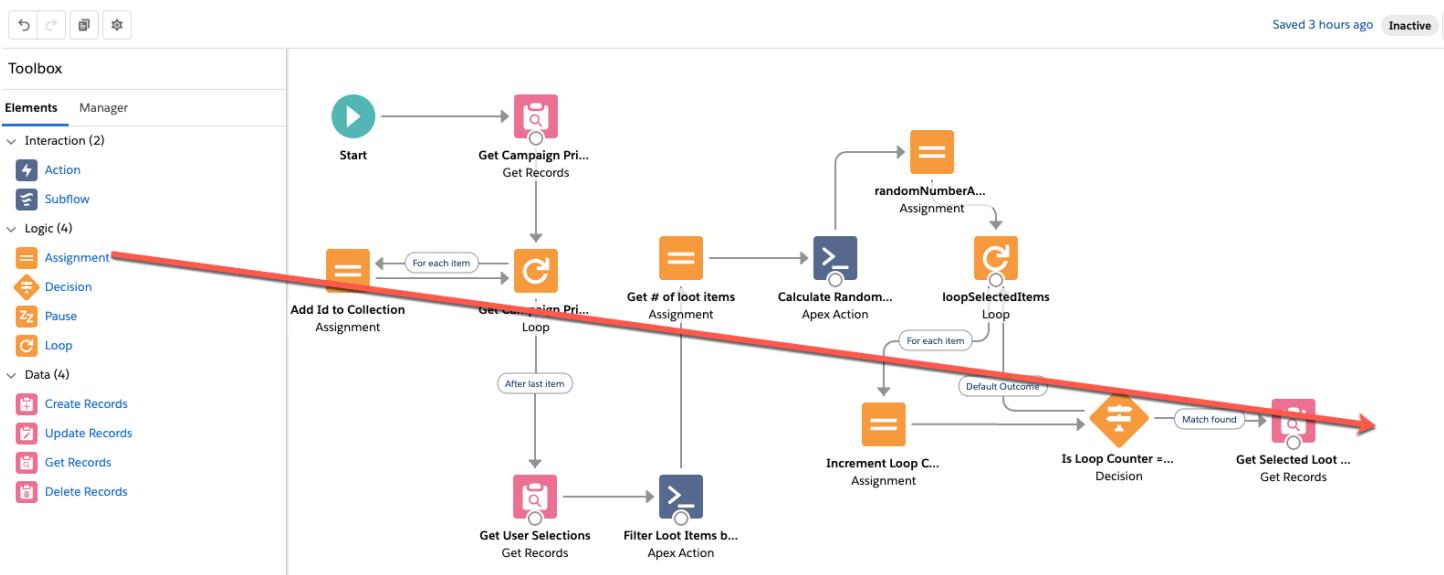
In this exercise you will be adding components to create a Loot Winner Object and update the Participant record's Last Prize Win date field.



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



- On the screen that pops up, enter the following details.
- Drag an **Assignment** element onto the canvas to the right of the **Get Selected Loot Item** element.



- 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

New Resource

\*Resource Type  
Variable

\*API Name  
lootDrawWinner

Description

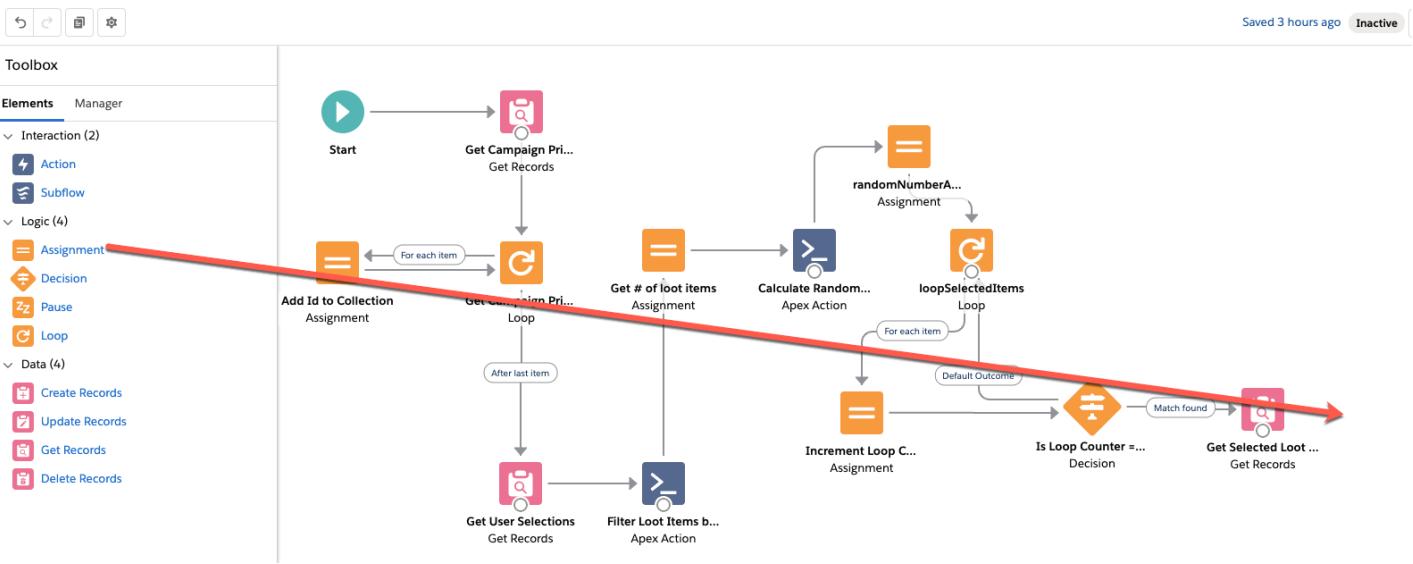
\*Data Type  
Record

Object  
Loot Winner

Availability Outside the Flow  
 Available for input  
 Available for output

Cancel Done

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	<pre>{!lootDrawWinner.Participant__c}</pre> <p>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.</p>

Operator	Equals
Equals	{!winningLootItem.Participant__c}
2 <sup>nd</sup> 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.

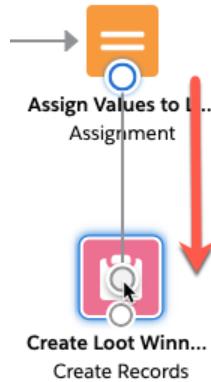
Parameter	Value
Label	Create Loot Winner Record
API Name	Create_Loot_Winner_Record (auto populates)
How Many Records to Create	One
How to set the Record Fields	Use all values from a Record Variable
Select Variable	lootDrawWinner

New Create Records

Create Salesforce records using values from the flow.

* Label	* API Name
Create Loot Winner Record	Create_Loot_Winner_Record
Description	(lootDrawWinner)
How Many Records to Create	<input checked="" type="radio"/> One <input type="radio"/> Multiple
How to Set the Record Fields	<input checked="" type="radio"/> Use all values from a record variable <input type="radio"/> Use separate variables, resources, and literal values
Select Variable	* Record Variable (lootDrawWinner)
Make sure that ID is blank. After the flow creates the records, ID is set to match the record that was created. ⓘ	
<a href="#">Cancel</a> <span style="background-color: #00529F; color: white; padding: 2px 10px; border-radius: 5px;">Done</span>	

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
<b>Filter Participant Records</b>	
Condition Requirements	Conditions are Met
Field	Id
Operator	Equals
Value	{!winningLootItem.Participant__c}
<b>Set Field Values for Participant Records</b>	
Field	Last_Prize_Win__c
Value	{\$Flow.CurrentDate} NOTE – Look for \$Flow in the auto suggestions, click into and choose Current Date

New Update Records

\* Label: Update Participant Last Win Date \* API Name: Update\_Participant\_Last\_Win\_Date

Description:

How to Find Records to Update and Set Their Values  
 Use the IDs and all field values from a record variable or record collection variable  
 Specify conditions to identify records, and set fields individually

Update Records of This Object Type  
Object: Participant

Filter Participant Records  
Condition Requirements: Conditions are Met

Field: Id Operator: Equals Value: !lwinningLootItem.Participant\_\_c

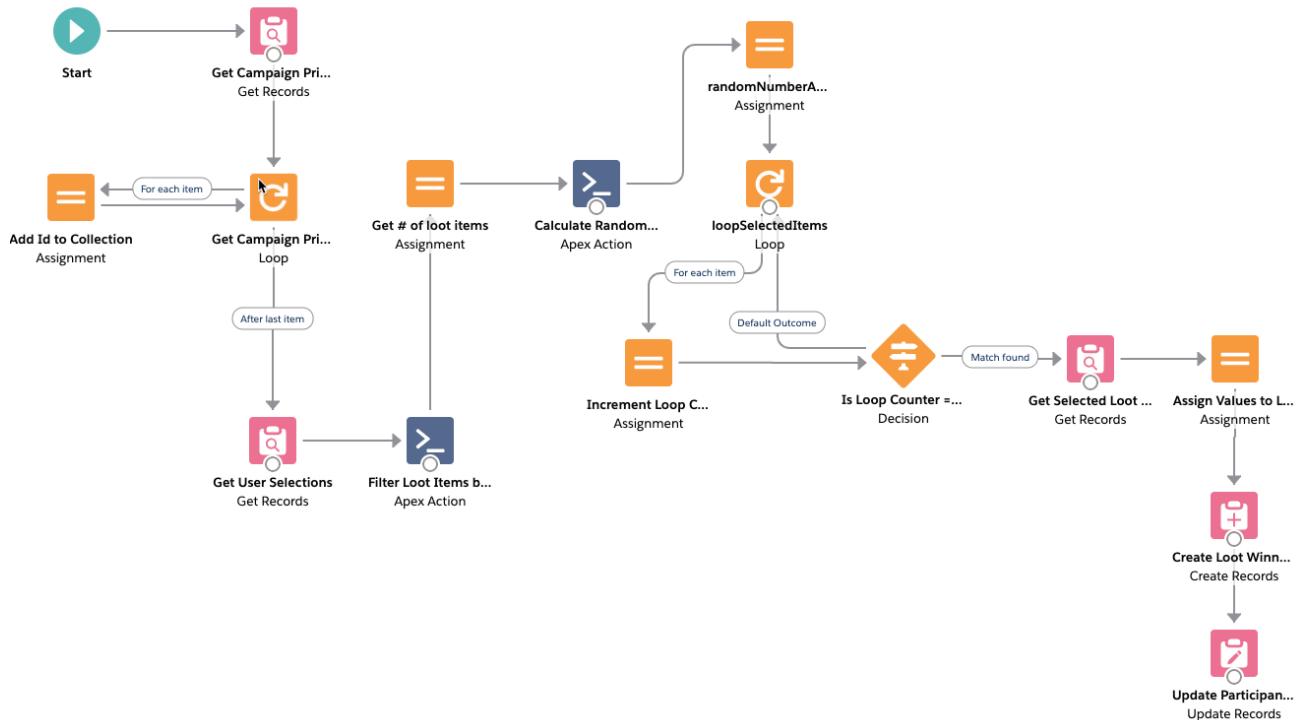
+ Add Condition

Set Field Values for the Participant Records

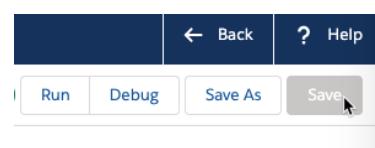
Field: Last\_Prize\_Win\_\_c Value: !ISFlow.CurrentDate

Cancel Done

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.

Action	Flow Label	Version	Description	Built with	Created Date	Type	Status
<a href="#">Open</a>   <a href="#">Run</a> <b>Activate</b>	Get Campaign Winner	1		Flow Builder	9/12/2019 12:19 PM	Autolaunched Flow	Inactive

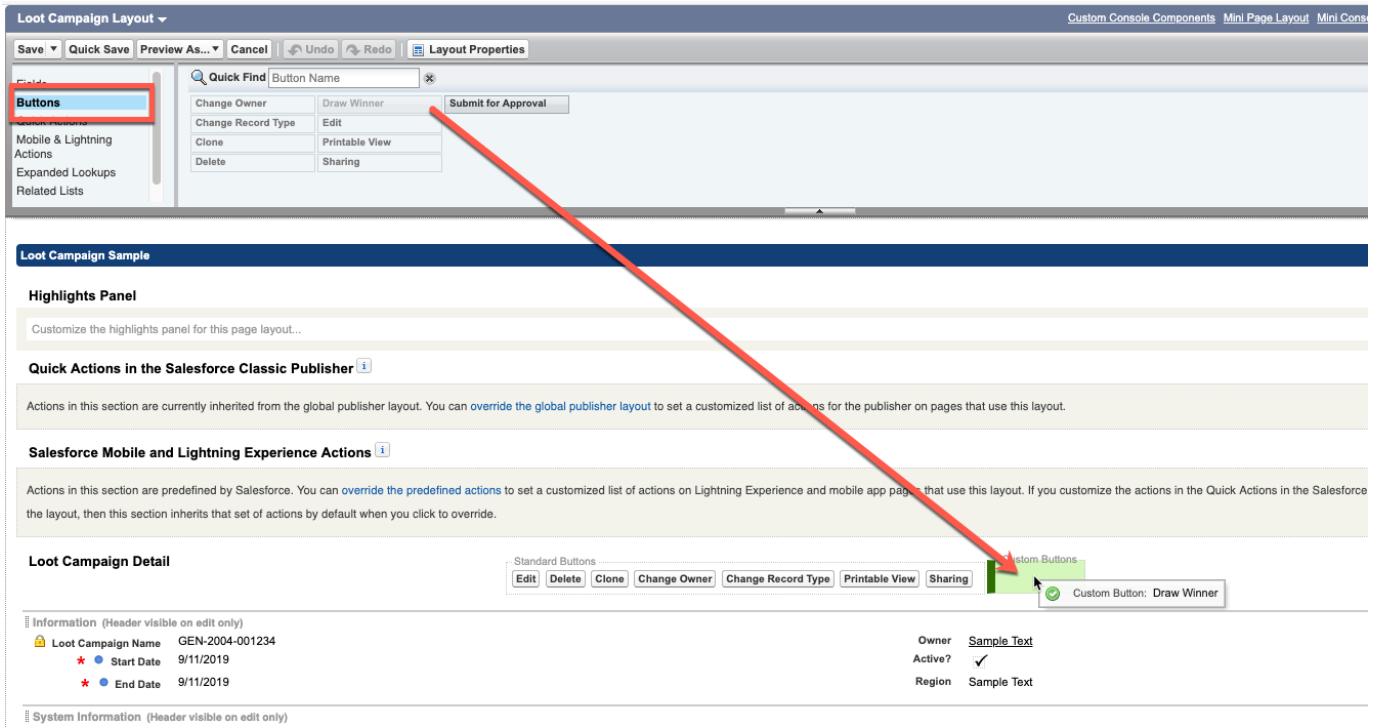
## Invoking the Flow via a Button

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.

Label	Draw Winner	Object Name	Loot Campaign
Name	Draw_Winner	Link Encoding	Unicode (UTF-8)
Behavior	Display in new window	Display Type	Detail Page Button
Button or Link URL	/flow/Get_Campaign_Winner?recordId={!Loot_Campaign__c.Id}&retURL=/lightning/o/Loot_Winner__clist?filterName=Recent	Show Address Bar	<input type="checkbox"/>
Height (in pixels)	600	Show Scrollbars	<input checked="" type="checkbox"/>
Width (in pixels)		Show Toolbars	<input type="checkbox"/>
Window Position	No Preference	Show Menu Bar	<input type="checkbox"/>
Resizable	<input checked="" type="checkbox"/>	Show Status Bar	<input type="checkbox"/>
Description		Modified By	Abhishek Chaturvedi, 9/12/2019 11:38 AM
Created By		Created By	Abhishek Chaturvedi, 9/12/2019 11:38 AM

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.

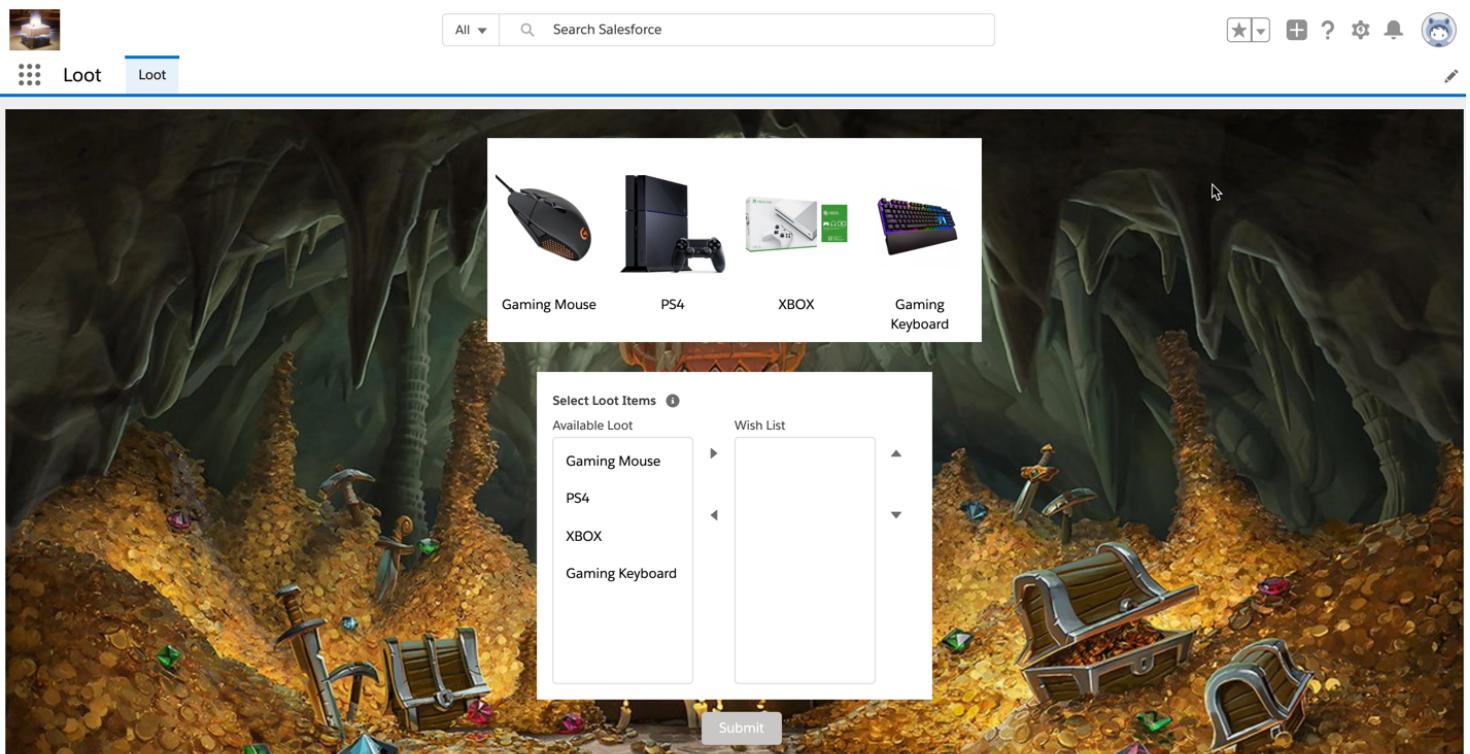


## 7. Click Save.

## Lab 6 – Try out the Loot App

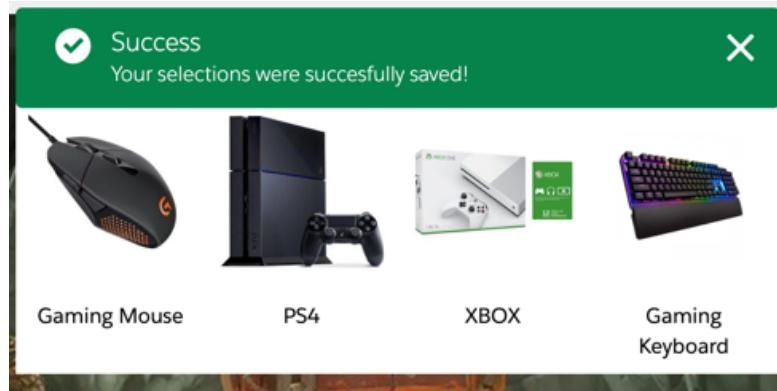
Now that we have configured everything to administer a Loot Campaign and for end users to be able to select loot items, let's try out the Loot App.

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.

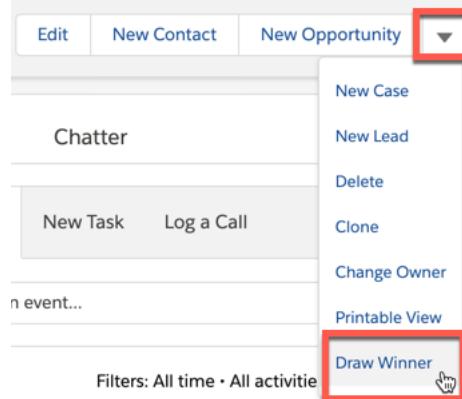


2. While we added only one component to the page using the Lightning App Builder, there are actually multiple components on the screen contained within the single component. Here the images on the top are from a separate component but it has been nested in the **lootSelector** component. The components 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.

LOOT WINNER NAME
<input type="checkbox"/> LW-000001

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.

Field	Value
Loot Winner Name	LW-000001
Participant	<a href="#">Abhishek Chaturvedi</a>
Prize	PS4
Draw Date	9/12/2019
Created By	<a href="#">Abhishek Chaturvedi</a> , 9/12/2019 12:22 PM
Owner	<a href="#">Abhishek Chaturvedi</a>
Last Modified By	<a href="#">Abhishek Chaturvedi</a> , 9/12/2019 12:22 PM

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

Field	Value
Participant Name	Abhishek Chaturvedi
Participant Email	<a href="#">achaturvedi@salesforce.com</a>
Created By	<a href="#">Abhishek Chaturvedi</a> , 9/12/2019 11:41 AM
Last Prize Win	9/12/2019
Region	West
Owner	<a href="#">Abhishek Chaturvedi</a>
Last Modified By	<a href="#">Abhishek Chaturvedi</a> , 9/12/2019 12:23 PM

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.

The screenshot shows the Salesforce Chatter tab. On the left, there's a sidebar with 'What I Follow' (including 'To Me', 'Bookmarked', 'Company Highlights', 'My Drafts', 'STREAMS', and 'SFDX') and 'Recent Groups' (including 'Pathfinders Salesforce...', 'Salesforce DX (SFDX)', 'Bay Area Distribution ...', 'Tesla Model 3 (Future)...', and 'IT Enterprise Integrati...'). The main feed area has a 'Post' button with options 'Question', 'Thanks', and 'Poll'. A red box highlights the 'Post' button with the text 'Post an update, ask a question, give thanks or post a poll'. Below it is a 'Share' button. To the right of the feed is a 'Search Feed' input field. The main feed shows a post from 'Meredith Schmidt' about Halloween costumes. The right sidebar features 'Einstein Recommendations' for users like Scott Jorgensen, Polly Sumner, and Q Branch, each with a '+ Follow' or '+ Join' button. Below that is a 'Trending Topics' section with links to 'Salesforce Ohana', 'JP', 'Service Cloud SDO', 'WorldsBestWorkplaces', and 'Superproud'.

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**”

The screenshot shows the Salesforce Setup Home page. In the center, there's a 'Go Mobile' banner with the text 'Prepare the Salesforce mobile app for your users.' and a 'Get Started' button. To the left, there's a 'Feature Settings' sidebar with a tree view. Under 'Chatter', the 'Chatter Settings' node is expanded, showing 'Email Settings', 'Feed Item', 'Feed Tracking', 'Groups', 'Influence', and 'Triggers'. The 'Feed Tracking' node is highlighted with a red box.

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.

**Feed Tracking**

Enable feed tracking for objects so users can follow records of that object type. Select fields to track so users can see feed updates when those fields are changed on records they follow.

Lead	3 Fields
Location	
Loot Campaign	4 Fields
Loot Winner	
Maintenance Asset	
Maintenance Plan	
Metric	0 Fields
Operating Hours	
Opportunity	5 Fields
Order	
Order Product	
Participant	
Performance Cycle	0 Fields
<b>Prize</b>	
Product	
Product Consumed	
Product Item	
Product Item Transaction	
Product Request	
Product Request Line Item	
Product Required	
Product Transfer	
Report	
Resource Absence	

**Fields in prizes**

Enable Feed Tracking

You can select up to 3 fields.

Owner  Prize Name  Prize Image URL

You can also display feed activity for related objects.

All Related Objects    Enable Feed Tracking

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.

Loot Administration    Loot Campaigns    Prizes    Participants    Campaign Prize Items    Selected Loot Items    Loot Winners    Chatter    Reports    Dashboards

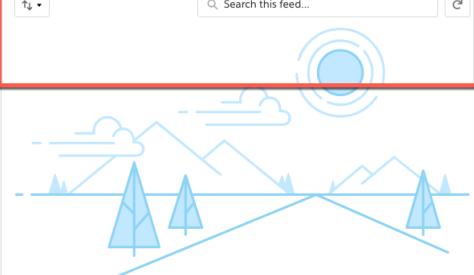
**Gaming Headphone**

Edit New Contact New Opportunity

Related	Details
Prize Name Gaming Headphone	Prize Image URL <a href="https://tpucdn.com/review/onikuma-k5/images/small-v1558119494.png">https://tpucdn.com/review/onikuma-k5/images/small-v1558119494.png</a>
Prize Image 	Owner <a href="#">User User</a>
Created By <a href="#">User User</a> , 9/9/2019 8:29 AM	Last Modified By <a href="#">User User</a> , 9/9/2019 8:29 AM

Activity **Chatter**

Share an 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 –

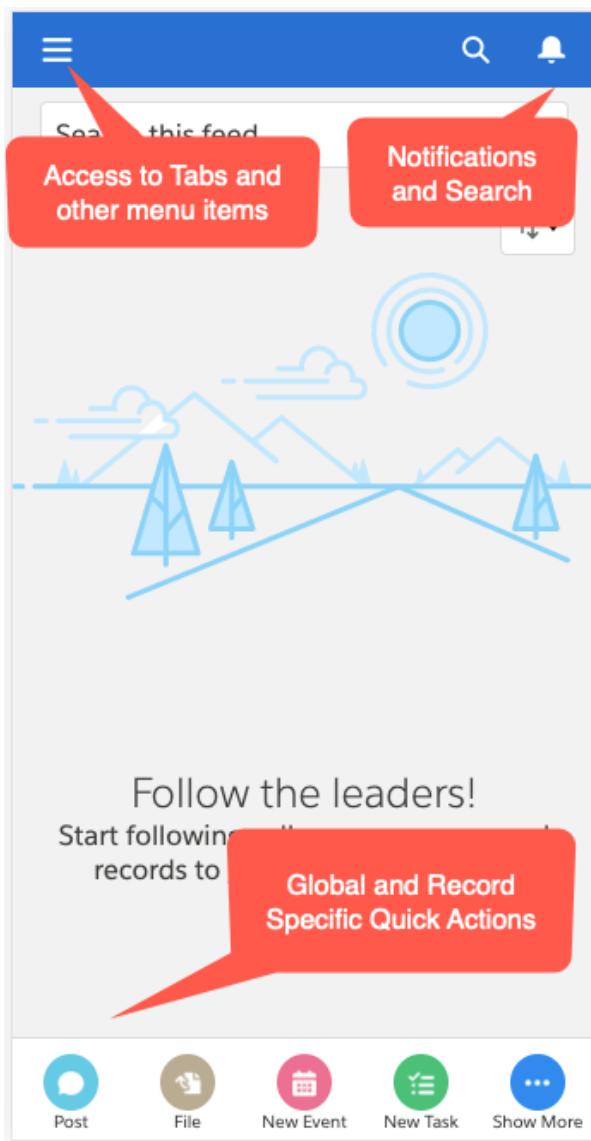
[Salesforce Mobile on the Apple App Store](#)

[Salesforce Mobile on the Google Play Store](#)

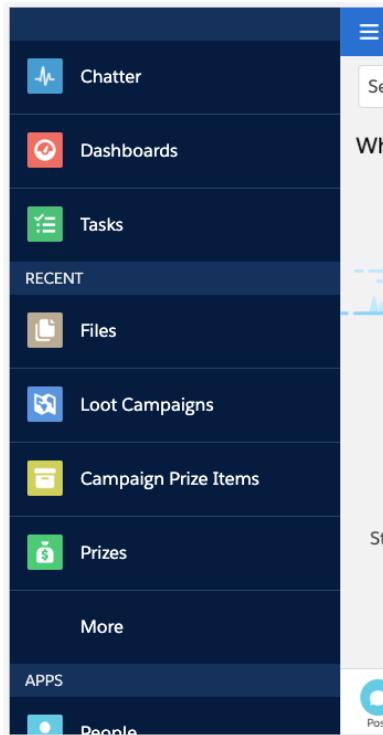
You can also use the following Chrome extension from the Chrome Web Store to emulate a mobile form factor

[S1 Demo Chrome Extension](#)

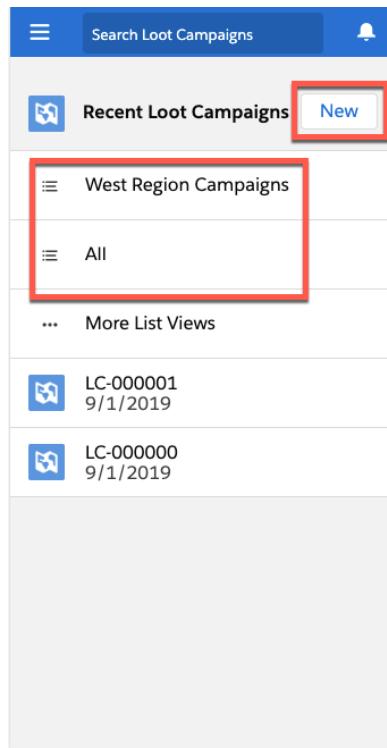
1. Open the mobile app or the chrome extension and log in with your Salesforce user name and password. You should see the following screen.



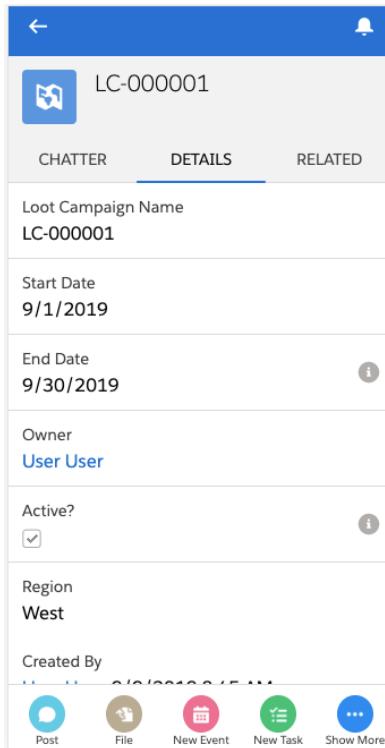
2. Click on the hamburger menu to reveal menu items. Scroll down to see the different sections if the menu. If you don't see the tab you're looking for under the 'Recent' section click on 'More' to reveal more tabs.



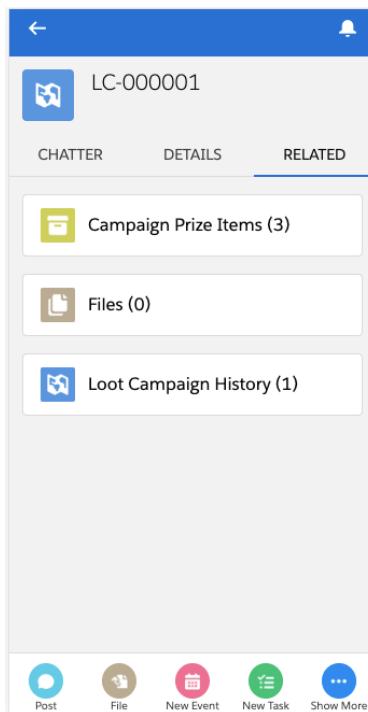
3. You can see the list views you created, recent Request records you accessed and a button to create new Request records.



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.

The screenshot shows a mobile application interface for managing campaign prize items. At the top, there is a blue header bar with a back arrow and a notification bell icon. Below the header, the title "Campaign Prize Items" is displayed next to a folder icon, with "3 items" underneath. The screen lists three items:

- PS4**: Shows a thumbnail of a black PS4 console and a controller. To the left, it says "Prize Na..." and "PS4".
- XBOX**: Shows a thumbnail of an Xbox console. To the left, it says "Prize Na..." and "XBOX".
- Gaming Mouse**: Shows a thumbnail of a black gaming mouse. To the left, it says "Prize Na..." and "Gaming Mouse".

At the bottom of each item's card, there is a red-bordered "New" button with a plus sign inside, indicating a new item can be created.