**What is an Application in Salesforce?**

* An **Application (App)** in Salesforce is a **collection of tabs** that work together to provide a specific set of functionalities for a business process.
* For example, the **Sales App** allows users to manage Leads, Opportunities, Accounts, and Contacts — all in one place.

**Types of Applications in Salesforce**

Salesforce provides two main types of applications:

**1. Standard Applications**

These are prebuilt by Salesforce and come out-of-the-box.  
Examples include:

* **Sales** – Used to manage leads, opportunities, accounts, and contacts.
* **Service (Call Center)** – Used for case management and customer support.
* **Marketing** – Used for campaign and lead management.
* **Community (Experience)** – Used to manage customer and partner communities.

**2. Custom Applications**

Custom Apps are created by users or developers to meet specific business needs.  
They can include:

* Custom objects
* Custom tabs
* Custom branding (logo and colour)

**3. Console Applications**

A **Console App** is a **tab-based workspace** designed for high-volume, fast-paced environments (like Sales or Service teams).  
It allows users to:

* Manage multiple records on a single screen
* Open records as tabs or sub-tabs
* Reduce navigation time by minimizing clicks and scrolling

**Use Case:**  
In a Service Console, agents can view *Cases*, *Contacts*, and *Knowledge Articles* side by side without switching screens.

**What are Tabs in Salesforce?**

**Tabs** in Salesforce act as **entry points** to access and manage information for different objects.

**Types of Tabs in Salesforce**

|  |  |
| --- | --- |
| **Type** | **Description** |
| **Custom Object Tab** | Displays data of a **custom object** in a tab format. |
| **Web Tab** | Displays an **external web page or application** inside Salesforce. |
| **Visualforce Tab** | Displays the UI from a **Visualforce Page**. |
| **Lightning Page Tab** | Allows adding a **custom Lightning** to Lightning Experience or the Salesforce mobile app. |
| **Standard Object Tab** | (Predefined) Displays standard Salesforce objects. |

**Tab Settings**

Tab visibility can be controlled at the **profile** or **permission set** level to determine which users can access which tabs.

|  |  |  |
| --- | --- | --- |
| **Setting** | **Visibility** | **Behaviour / Access** |
| **Default On (Available & Visible)** | Tab is visible by default in its associated app. | - Appears in the navigation bar.  - Users can hide or show it in other apps. |
| **Default Off (Available)** | Tab is hidden by default but available in “All Tabs” (the “+” icon). | - Users can manually add it to their app. |
| **Tab Hidden (None)** | Tab is not available at all. | - Users cannot access it, even from “All Tabs.” |

⚙️ **Note:**

* **Profiles** and **Permission Sets** use slightly different labels for these settings.
* Tab visibility often depends on **object-level permissions** (Read, Create, Edit, Delete).

**What are Objects in Salesforce?**

In Salesforce, **Objects** are like **database tables** that store data specific to an organization.  
Each object consists of a set of **fields (columns)** and **records (rows)** — similar to how data is stored in a spreadsheet or a database.

Objects allow you to model and manage business data within Salesforce.

**Types of Objects in Salesforce**

|  |  |  |
| --- | --- | --- |
| **Type** | **Description** | **Examples** |
| **Standard Objects** | These are prebuilt objects provided by Salesforce. They come by default with every Salesforce org. | Accounts, Contacts, Leads, Opportunities, Cases, Campaigns, etc. |
| **Custom Objects** | These are objects **created by users or developers** to store data specific to their business requirements.  Their API name ends with \_\_c. | Student\_\_c, Invoice\_\_c, Project\_\_c, Asset\_\_c, etc. |

**Default Fields in Every Custom Object**

When you create a **Custom Object**, Salesforce automatically includes a few standard fields to help track record information:

|  |  |
| --- | --- |
| **Field Name** | **Description** |
| **Created By** | The user who created the record, along with the timestamp. |
| **Last Modified By** | The user who most recently updated the record, along with the timestamp. |
| **Name** | The unique identifier for each record. (Can be Text or Auto Number type) |
| **Owner** | The user who owns or is responsible for the record. |

**What are Fields in Salesforce?**

A **Field** in Salesforce is similar to a **column in a database table**.

**Types of Fields in Salesforce**

There are **two main types of fields**:

**1. Standard Fields**

* **Standard Fields** are created by Salesforce by default on standard and custom objects.
* We **cannot delete** standard fields.
* We can **rename the field label**, but the underlying API name remains unchanged.
* We **cannot create additional standard fields**.
* **Do not have API names** visible with the “\_\_c” suffix.

**2. Custom Fields**

* **Custom Fields** are created by users to capture extra data as per business needs.
* We **can create** and **delete** custom fields.
* Each custom field has a unique **API name** ending with \_\_c.
* We can define the **field type** (e.g., Text, Number, Checkbox, Picklist, Date, Lookup, etc.).

**📘 Salesforce Field Types – Quick Reference Table**

|  |  |  |
| --- | --- | --- |
| **#** | **Field Type** | **Description** |
| 1 | **Auto Number** | System-generated sequence based on a defined format. |
| 2 | **Checkbox** | Boolean field storing True/False values. |
| 3 | **Currency** | Stores monetary values with a currency symbol. |
| 4 | **Date** | Stores only date values. |
| 5 | **Date/Time** | Stores both date and time. |
| 6 | **Email** | Stores and validates email addresses. |
| 7 | **Geolocation** | Stores latitude and longitude coordinates. |
| 8 | **Number** | Stores numeric values (up to 18 digits). |
| 9 | **Percent** | Displays numbers as percentages. |
| 10 | **Phone** | Stores and formats phone numbers. |
| 11 | **Picklist** | Allows single selection from predefined values. |
| 12 | **Picklist (Multi-Select)** | Allows multiple selections; stored as text separated by semicolons. |
| 13 | **Text** | Stores up to 255 characters. |
| 14 | **Text Area** | Multiline text up to 255 characters. |
| 15 | **Text Area (Long)** | Multiline text up to 131,072 characters. |
| 16 | **Text Area (Rich)** | Formatted text with links, images, and styles. |
| 17 | **Text (Encrypted)** | Stores encrypted text for sensitive data. |
| 18 | **Time** | Stores local time values only. |
| 19 | **URL** | Stores website links. |
| 20 | **Formula** | Read-only field calculated from other fields. |

**🎯 Field Dependency in Salesforce**

**Field Dependency** allows you to **control the visibility of picklist values** in one field based on the selected value of another field.

**⚙️ Components of Field Dependency**

|  |  |  |
| --- | --- | --- |
| **Term** | **Description** | **Example** |
| **Controlling Field** | Determines which values are available in the dependent field. | Country |
| **Dependent Field** | Displays filtered values based on the controlling field’s value. | State |

**🧱 Supported Field Types**

|  |  |  |
| --- | --- | --- |
| **Field Type** | **Allowed As** | **Notes** |
| **Checkbox** | Controlling field only | Example: If “Yes” → show extra options |
| **Picklist** | Controlling or Dependent | Controlling picklist can have a max of **300 values** |
| **Multi-Select Picklist** | Dependent only | Cannot be used as controlling field |

**🌍 Global Picklist in Salesforce**

* A **Global Picklist** (also known as **Global Value Set**) is a **shared set of picklist values** that can be used across **multiple picklist fields** in different objects.
* It ensures **data consistency**, **reusability**, and **centralized management** of picklist values.

**⚙️ Key Features**

|  |  |
| --- | --- |
| **Feature** | **Description** |
| **Reusability** | A single value set can be used across multiple custom picklist fields and objects. |
| **Centralized Control** | Any change made to the global picklist automatically reflects everywhere it’s used. |
| **Restricted Picklist** | You can restrict users from adding new values directly on the field — they must exist in the global value set. |
| **Consistency** | Helps maintain uniform data across multiple objects (e.g., Lead, Account, Opportunity). |
| **Translation Support** | Global picklists can be translated for multi-language orgs. |

**⚠️ Limitations**

🚫 Global picklists can only be used with **custom picklist fields** (not standard ones).  
🚫 You can’t convert an **existing non-global picklist** directly into a global picklist — you must create a new one.

**🧱 What is Schema Builder?**

**Schema Builder** is a **visual tool** in Salesforce that lets you view and manage all objects, fields, and relationships in your org on a single canvas.

**🎯 Key Features of Schema Builder**

|  |  |
| --- | --- |
| **Feature** | **Description** |
| **Visual Representation** | Displays objects as boxes showing their fields and relationships. |
| **Drag-and-Drop Creation** | Allows creation of **Custom Objects**, **Fields**, and **Relationships** visually. |
| **Auto Layout** | Automatically arranges objects and relationships for clear visualization. |
| **Field Details View** | Quickly view data type, API name, and required/lookup details for any field. |