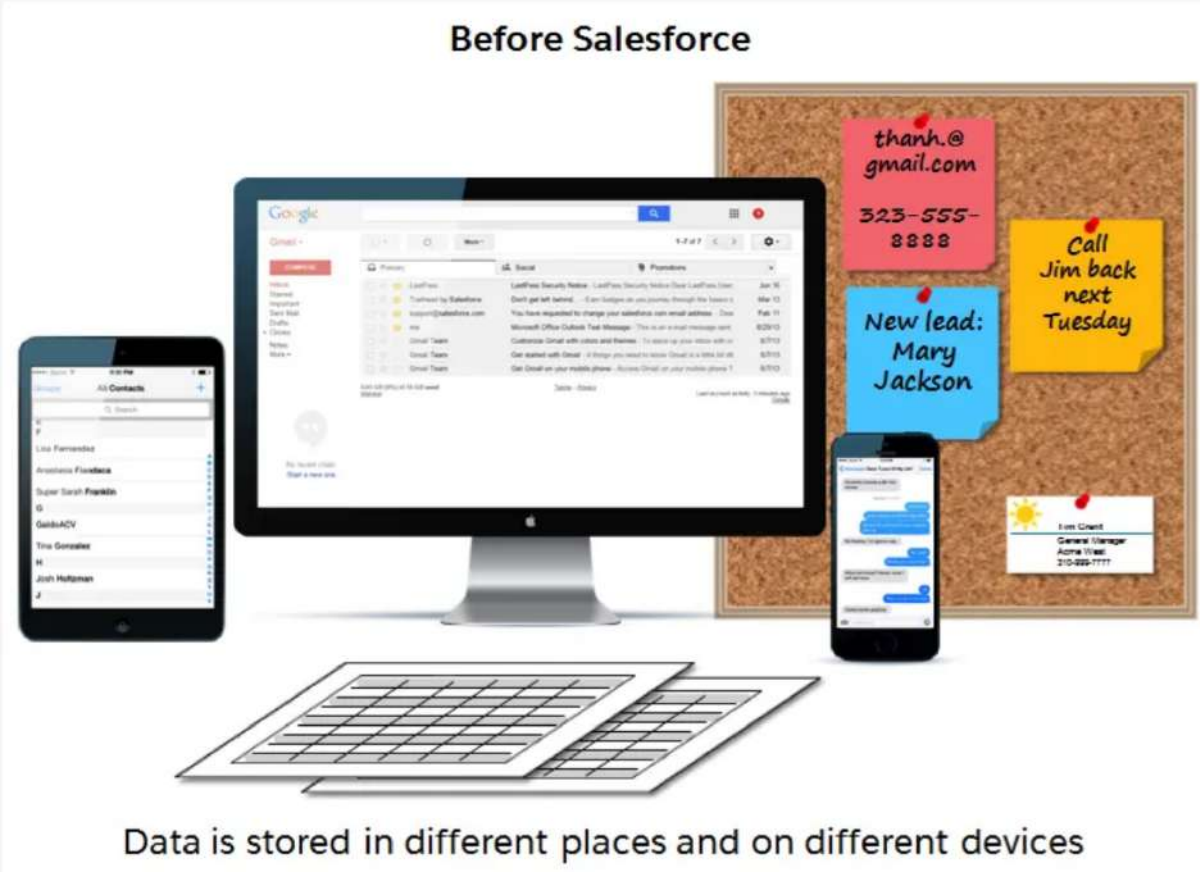
INTRODUCTION TO SALESFORCE

What Is Salesforce?

- Salesforce is an American cloud-based software company headquartered in San Francisco, California Salesforce was founded in 1999 by Marc Benioff.Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

- Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:



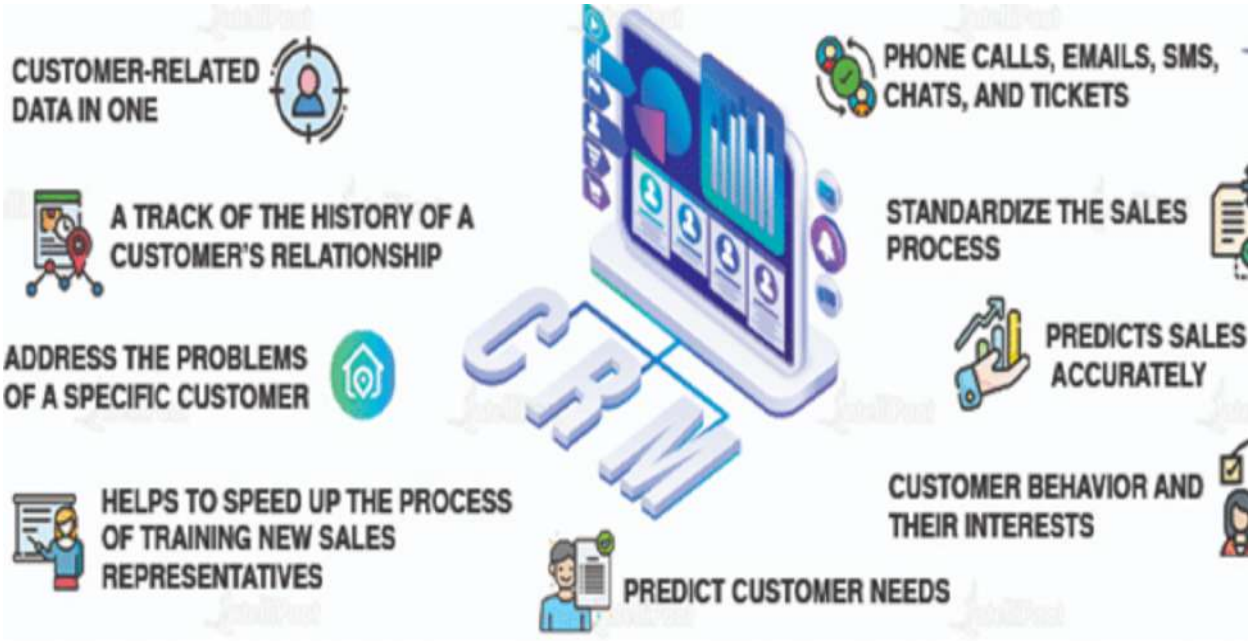
- It is a **CRM Solution** that brings companies and customers together.
- Salesforce is the # first company that took CRM to the cloud, enabling companies to access all of their customer information online, from any device, anywhere in the world, 24/7.
- Salesforce architecture is so popular because of its **multitenancy (multi-tenant Architecture).**

What Is CRM? ----- (Customer Relationship Management)

CRM stands for Customer Relationship Management. This technology allows you to manage relationships with your customers and prospects and track data related to all of your interactions. It also helps teams collaborate, both internally and externally, gather insights from social media, track important metrics, and communicate via email, phone, social, and other channels.

- CRM is a strategy for managing an organization's relationships and interactions with customers and potential customers
- To understand the customer's needs.
- To fill 360 degree gap between customer and organization
- It's a system that keeps your customer information in one place, so your team can manage your contact with your customers with this full history in mind.

What does Salesforce CRM Do?



CRM helps companies in various ways; some of them are mentioned below:

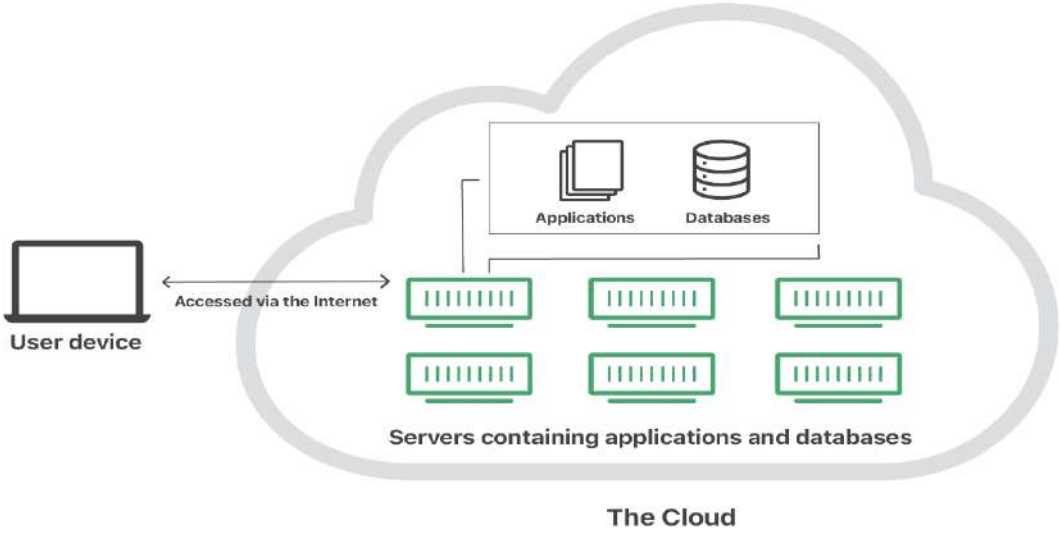
- CRM helps to keep all customer-related data in one, easily accessible place. This enables everyone in the company to access the information whenever needed.
- It helps in keeping track of all the interactions that the company has with customers via phone calls, emails, SMS, chats, and tickets.
- It helps to keep a track of the history of a customer's relationship with the company, its length, purchasing history, etc.
- CRM helps to standardize the sales process, helping your sales team close deals quicker. CRM also provides the sales team with a proper guide to close deals.
- It helps to clarify why a deal must be stalling and/or how to address the problems of a specific customer.
- CRM predicts sales pretty accurately, enabling you to make accurate forecasts.
- It helps to speed up the process of training new sales representatives.
- CRM gives detailed data about customer behavior and their interests. This keeps you focused on the customers.
- CRM helps you predict customer needs so that you are prepared before they come to you.

Why Do Companies Use Salesforce

- Adaptable: Since Salesforce is a cloud-based CRM, there is no requirement of downloading or installing any software. People can simply log in to their Salesforce accounts and enjoy the services according to their subscription plans.
- Cost reduction: One of the major reasons why companies are shifting to Salesforce CRM is that with traditional CRM, they have to invest in infrastructure, developers or coders, and hardware. With Salesforce CRM, they just need to have a Salesforce account with a proper subscription in order to work with the world's 1 CRM company.
- Customizable products: Salesforce CRM provides an AppExchange system that grants access to numerous applications. It provides users the ability to customize their applications according to their requirements.

What is Cloud ?

"The cloud" refers to servers that are accessed over the Internet, and the software and databases that run on those servers. Cloud servers are located in data centers all over the world. By using cloud computing, users and companies do not have to manage physical servers themselves or run software applications on their own machines



- The cloud enables users to access the same files and applications from almost any device, because the computing and storage takes place on servers in a data center, instead of locally on the user device.

What is cloud computing?

Cloud computing means that the applications are delivered over the Internet and run in any Web browser so that you can quickly and easily access them from anywhere with any delay

OR

Cloud computing is the delivery of different services through the internet.It means using remote servers to store and access data instead of relying on local hard drives and private Data Centers.

Cloud computing is a term used to describe the delivery of on-demand computing resources—hardware, storage, databases, networking, and software—to businesses and individuals via a network (usually the internet).

Cloud computing is possible because of a technology called virtualization. Virtualization allows for the creation of a simulated, digital-only "virtual" computer that behaves as if it were a physical computer with its own hardware. The technical term for such a computer is virtual machine

Some advantages of cloud computing :-

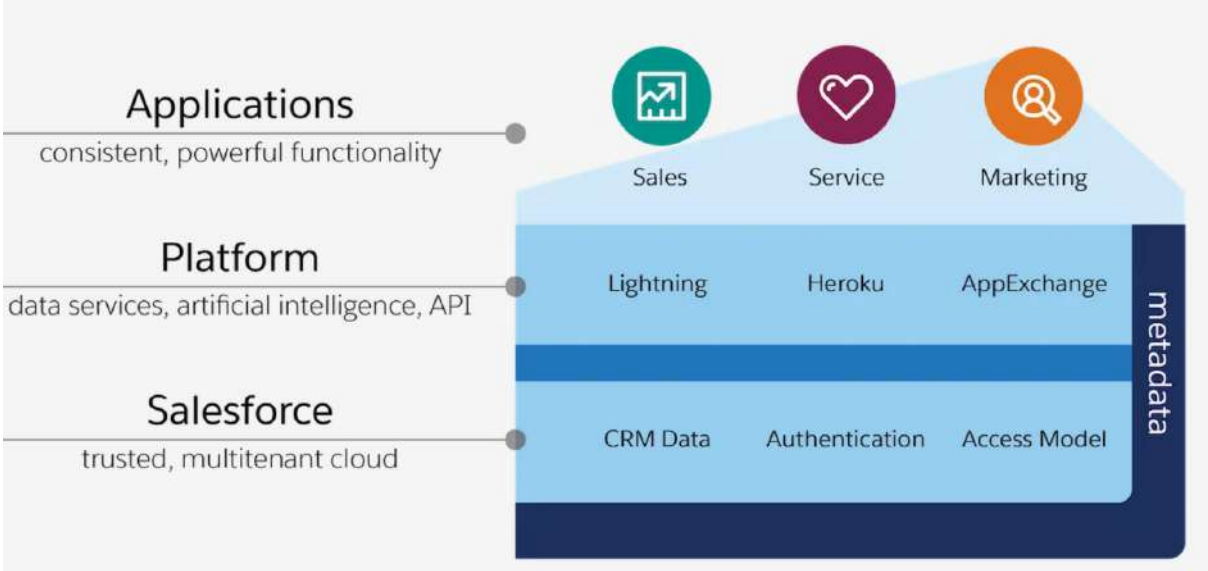
- Backup and restore data
- Mobility
- Scalability
- Pay As You Use
- Data Security
- No Hardware, No Software.
- Cloud computing applications are less expensive than desktop software
- It’s effectively infinite in size

What Is the Salesforce Architecture?

Salesforce is one of the leading CRM platforms to provide various customized services to its customers, partners, and employees. It also provides the platform to build custom apps, pages, components, etc., and it performs all these tasks so efficiently, mainly because of its architecture that it follows

Salesforce Architecture is the multilayer architecture; it contains a series of layers situated on the top of each other.

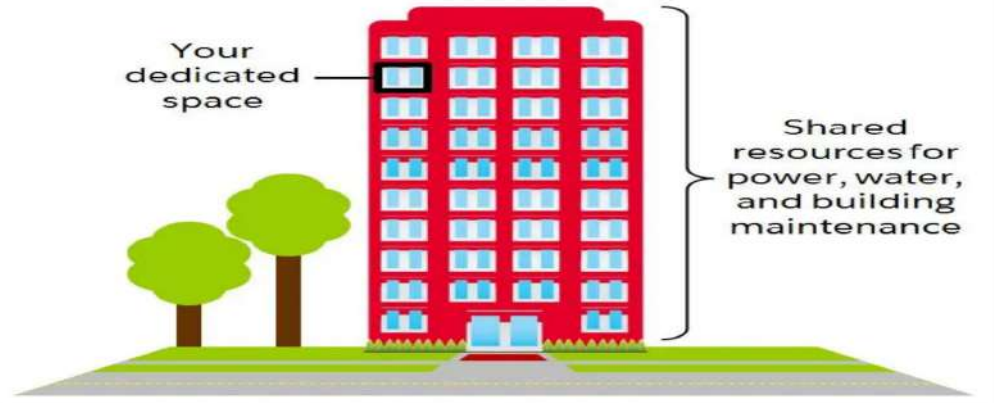
The below diagram shows the architectural view of the salesforce:



Terms used in above diagram:

Metadata - The metadata means data about the data .Metadata is data that describes other data. For example, in a Salesforce org, there is a standard object called Account. When you add a record with a customer's contact information to an Account, you are adding metadata and data. Field names, such as first name and last name are metadata.

Multitenant - *Salesforce architecture is so popular because of its **multitenancy**. The multitenant architecture means **one common application for multiple groups or clients** It means the data of one client is secure and isolated from other groups or clients*



Also - Because of multitenancy, any developer can develop an application, upload it on the cloud, and easily share it with multiple clients or groups.

What are cloud services?

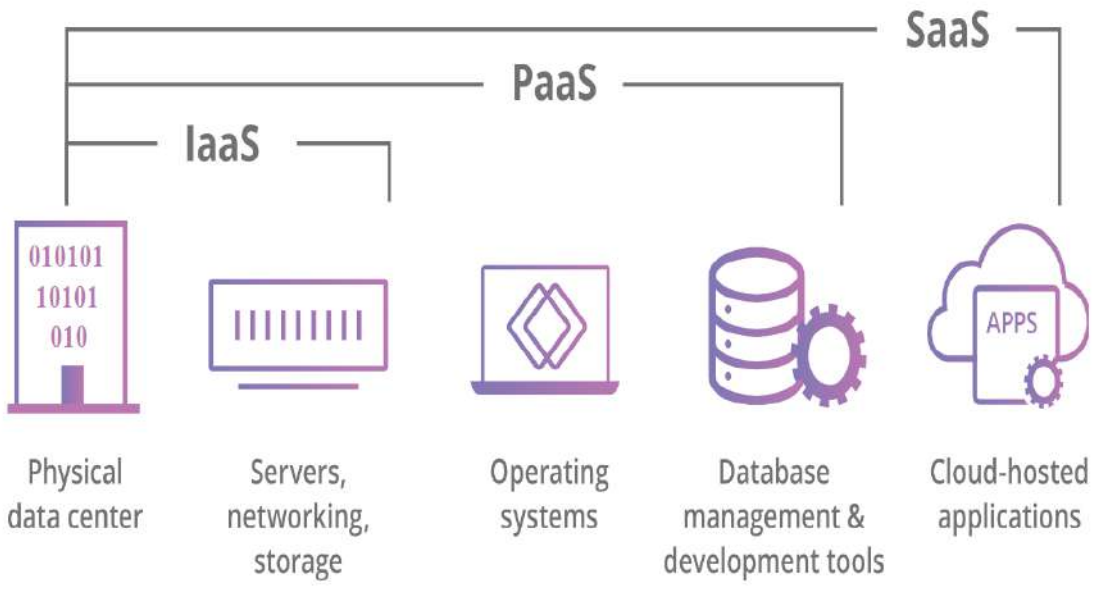
The resources available in the cloud are known as "services," since they are actively managed by a cloud provider. Cloud services include infrastructure, applications, development tools, and data storage, among other products. These services are sorted into several different categories, or *service models*.

What are the benefits of cloud services?

Using cloud computing services, subscribers access online resources through workstations, laptops, tablets, and smartphones that are configured to protect the data and assets hosted on the cloud. With a pay-as-you-go model, cloud services offer a low-cost way to accommodate spikes in demand more efficiently than in-house computing services.

What are the main service models of cloud computing?

Let us Understand First With Diagram:



Software-as-a-Service (SaaS): Instead of users installing an application on their device, Saas applications are hosted on cloud servers, and users access them over the Internet. SaaS is like renting a house: the landlord maintains the house, but the tenant mostly gets to use it as if they owned it**. Examples** of SaaS applications include Salesforce.

Platform-as-a-Service (PaaS): In this model, companies don't pay for hosted applications; instead they pay for the things they need to build their own applications. Paas Allows developers to develop their application over a platform including development tools, infrastructure, and operating systems, over the Internet. PaaS can be compared to renting all the tools and equipment necessary for building a house, instead of renting the house itself. PaaS **Examples** include Heroku and Microsoft Azure.

Infrastructure-as-a-Service (IaaS): In this model, a company rents the servers and storage they need from a cloud provider. They then use that cloud infrastructure to build their applications. Iaas is like a company leasing a plot of land on which they can build whatever they want — but they need to provide their own building equipment and materials.**Example** Amazon Web Services (AWS)

What are the different types of cloud deployments?

Private cloud: A private cloud is a server, data center, or distributed network wholly dedicated to one organizationIt can be accessed only within the limited premises.

Public cloud: A public cloud is a service run by an external vendor that may include servers in one or multiple data centers. Unlike a private cloud, public clouds are shared by multiple organizations .It can be available to people across the world. The user has no control over the resources

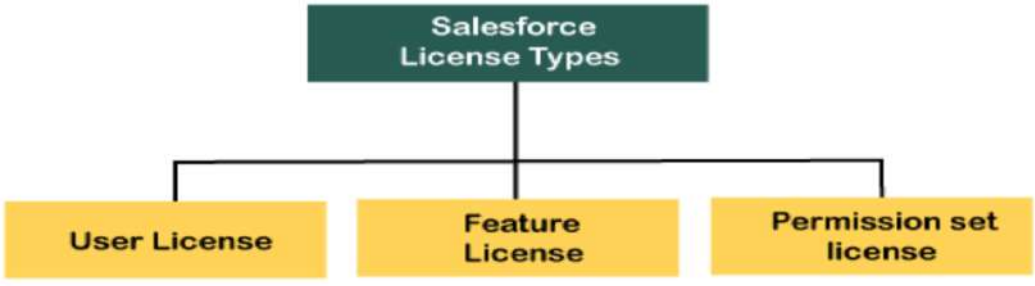
Hybrid cloud: Hybris Cloud deployments combine public and private clouds. An organization may use their private cloud for some services and their public cloud for others, or they may use the public cloud as backup for their private cloud.

Multi-cloud: It is a type of cloud deployment that involves using multiple public clouds. In other words, an organization with a multi-cloud deployment rents virtual servers and services from several external vendors . Multi-cloud deployments can also be hybrid cloud, and vice versa.

What Are Licenses : This is the users' access to Salesforce products and features that your company has – licenses are assigned specific to users. This provides them with the baseline level of access, which is then adjusted using profiles, permission sets, the role hierarchy, etc. Within your organization, everyone with access to the specific product/feature will be using the same edition

With each edition, different licenses are associated, which provide access to specific features and functionalities of Salesforce platform to the users. **It means the user license provided by the salesforce specifies the functionality that a particular user can access.**The licenses are available for an org and can be checked on the company information page.

Types of License : Mainly provides the below three types of Licenses:



1. User License:

The user license specifies which feature or functionality a user can access on salesforce. Each user must have one license. The users are assigned for the data access through their user-profile and optionally using one or more permission sets.

2. Feature License

The feature license authorizes the users to access additional features available in the salesforce that are not included in their user license, e.g., Marketing or WDC. A user can have any number of feature licenses.

3. Permission Set License

Like the feature license, the permission set license authorizes the users to access those features that are not included in their user-license. It is a convenient way to assign the permissions to use various tools and functions available on the platform.

Below are some actions that can be performed using the permission set license:

- It allows you to check for the number of permission set licenses in salesforce.com.
- These licenses can be assigned to a user.
- It also allows the company to remove the assigned license from the User.

Edition : Salesforce provides bundles of features and services that are specific for the different business needs. These bundles are known as Editions in Salesforce.

- Each edition provides the software with the same look & feel, but all editions differ by the *price, functionality, and features*.
- The edition is the type of salesforce instance, which determines what functionalities are available.

- Each salesforce edition offers different licenses to the organization that allow them to access different platform's functions.

There are five types of Salesforce Cloud Editions. These Editions are given below:

Essentials Edition : Essential Edition is the basic edition designed for small businesses who want to run their business on the CRM system quickly. It provides the proper setup assistant to get started with the system to the users. It helps the user with the assistance of using the UI and various administration tools to customize the business applications. ***The pricing for the essential edition is $25 user/month.***

The essential edition provides the default features to fulfill the needs of direct sales. It includes the following features:

- Account, Contact, Lead Management, and Opportunity Management
- Mobile Access of Salesforce CRM
- Sales Process Automation with the help of Process Builder.
- Service Console Apps
- Case Management
- Lead Assignment and routing
- Duplicate blocking
- Customizable Sales process.

Professional Edition : The professional edition is the advanced edition that is mainly designed for businesses that require more CRM functionalities, security, and customization. It provides easy to use customization tools. It also includes the integrations and administration tools to allow small or midsize application

deployment. It means this is the first edition that allows the companies to perform any development work on it. It allows us to create the *two user profiles per Org, two user roles per org, and permission sets*. But these are limited options for the mid-sized organization.

- The professional edition is well suited for mid-sized organizations with only one sales department with Upto 60 team members.
- **The pricing for the professional edition is $75 per user/month.**

It contains the essential features, including with the following features:

- Lead Registration and Rule-based lead scoring
- Sales orders
- Products and price books
- Collaborative forecasting
- Case milestone tracker
- Store and manage any number of contacts
- Track sales opportunities
- Provides the Person accounts
- Sales console App
- Forecasting Mobile App
- Unlimited Custom Applications
- Developer Sandbox
- Lightning Sync

Enterprise Edition : The enterprise edition is designed to fulfill the requirement of large and complex businesses. It provides access to all platform's functionality, which includes the advanced tools for the customizations and administrations.

This edition enables the organization to access the Salesforce APIs so that the developers can integrate the applications with the back-office systems.

The pricing to access all the functionalities of EE is 150 USD per user/month. It is one of the most popular salesforce editions among the companies that is most beneficial for the customers. Mostly the developers and administrators want to work with the enterprise edition, as it provides all the required functionality for the development and end-users.

It provides all the features of Profession edition, including the below features:

- Access to Apex and Visualforce
- Workflows and approval automation
- Product and Price books
- Sales Territory Management, accounts, and sales teams
- Offline access to the CRM
- Custom Opportunity Fields in Forecasting
- Opportunity Splits
- Web Service API with no additional Charge
- Unlimited Record Type
- Unlimited Roles and Permission
- Advanced Reporting Features.

Unlimited Edition : The unlimited edition maximizes business success and extends it across the entire enterprise through the Lightning Platform. It is the flagship solution for the salesforce.com, and also includes all the features of Enterprise edition with full premium support. It provides access to unlimited online training, over 1000 admin services. It allows us to develop unlimited custom Applications and create custom tabs and objects.

The Unlimited Edition is available with a price of *300 USD/user/month*.

The unlimited edition is the best option for the enterprise-level organization with multiple sales departments with more than 250 members.

It includes all the Enterprise Edition Features including below features:

- 24*7 Premium Support and configuration Services
- 2000 Database Object
- Completely Customizable mobile capabilities
- Access to unlimited mobile development sandboxes
- Access to a one-to-one coaching session with a salesforce Expert.

Developers Edition : The developer edition allows the businesses to access the Lightning Platform and APIs. It helps the developers to extend Salesforce, integrate with other applications, and develop new tools and applications.

It is the free edition mainly provided for the development and deployment on the Force.com platform. It provides excellent tools for the testing/training on salaesforce.com. It is a type of basic Enterprise Edition with minimal storage.

How to upgrade the Salesforce Edition?

The Salesforce Edition can be upgraded if it does not fulfill the business requirement, or if someone wants to extend its business capabilities.

To upgrade the edition, one needs to contact the salesforce account executive or Salesforce consulting company. We need to pay the difference in the amount between the current edition and the edition we are upgrading.

How to Check the Current Edition?

The Salesforce edition decides the features and functionality available in the org. We can check the current edition by checking the Organization Edition on the Company Information Page.

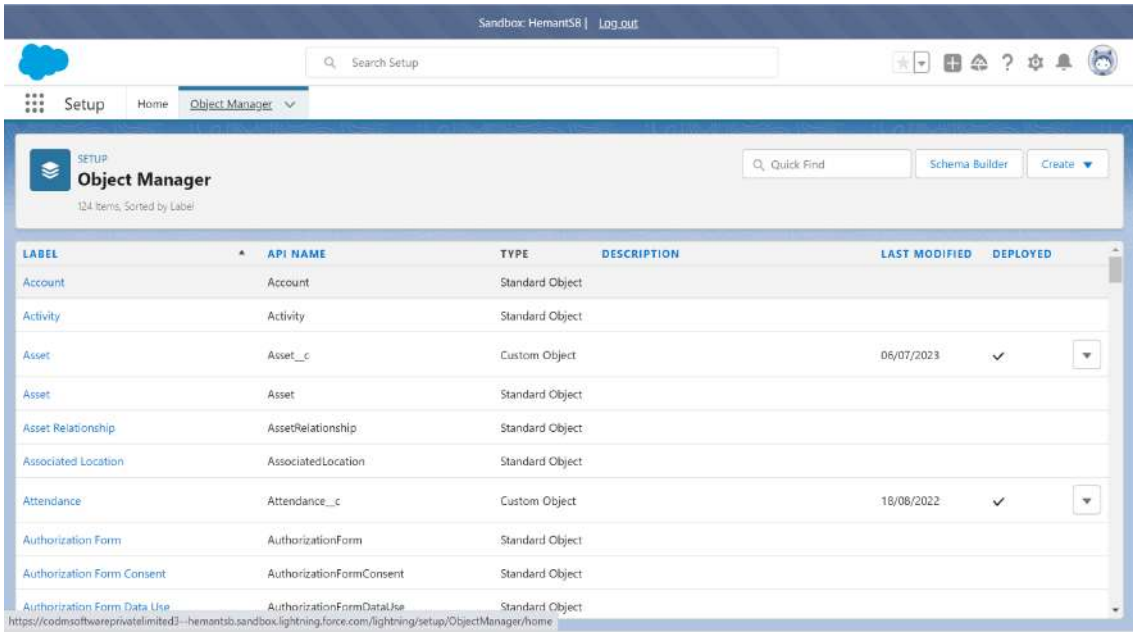
Follow the below two steps:

- From the **Setup** option, enter the *Company information* in the *quick find box*, and choose the **Company Information**.
- The **Organization Edition** will appear in the lower right of the screen.

What are Objects?

Objects are basically tables in which information is stored inside salesforce.Objects Are Basically Of Two Types :

- **Standard Object :** Standard objects are those objects which are already there in salesforce. They are inbuilt objects which are provided by salesforce Common business objects **like Account, Contact, Lead, and Opportunity** are all standard objects. Custom objects are objects that you create to store information that's specific to your company or industry.

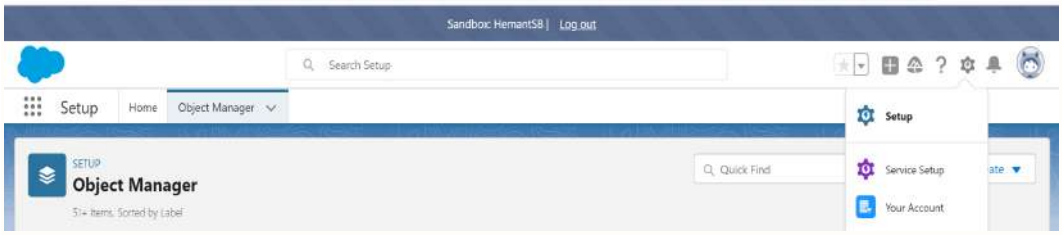


- **Custom Object :** Custom Object Are Those objects Which we create according to our need of an organization

How to create a custom object in Salesforce

Creating a custom object is actually quite simple. You'll have to make sure you have the appropriate permissions within your organization to do it, but once you have that sorted, just follow these steps:

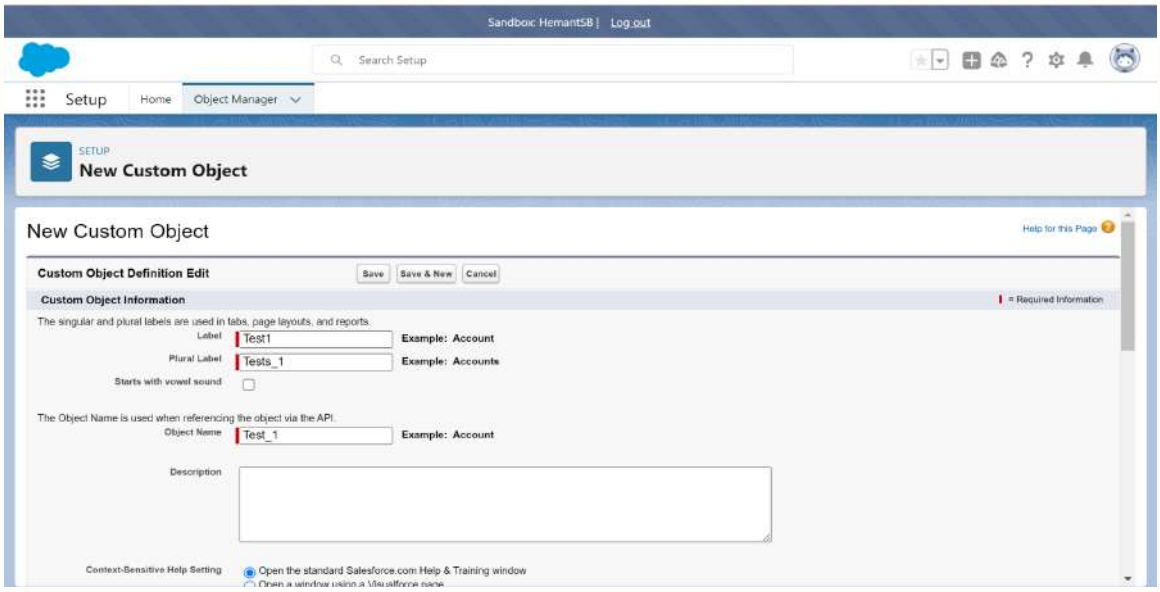
1. In your Salesforce org/sandbox , click the cog icon, and select **Setup**.



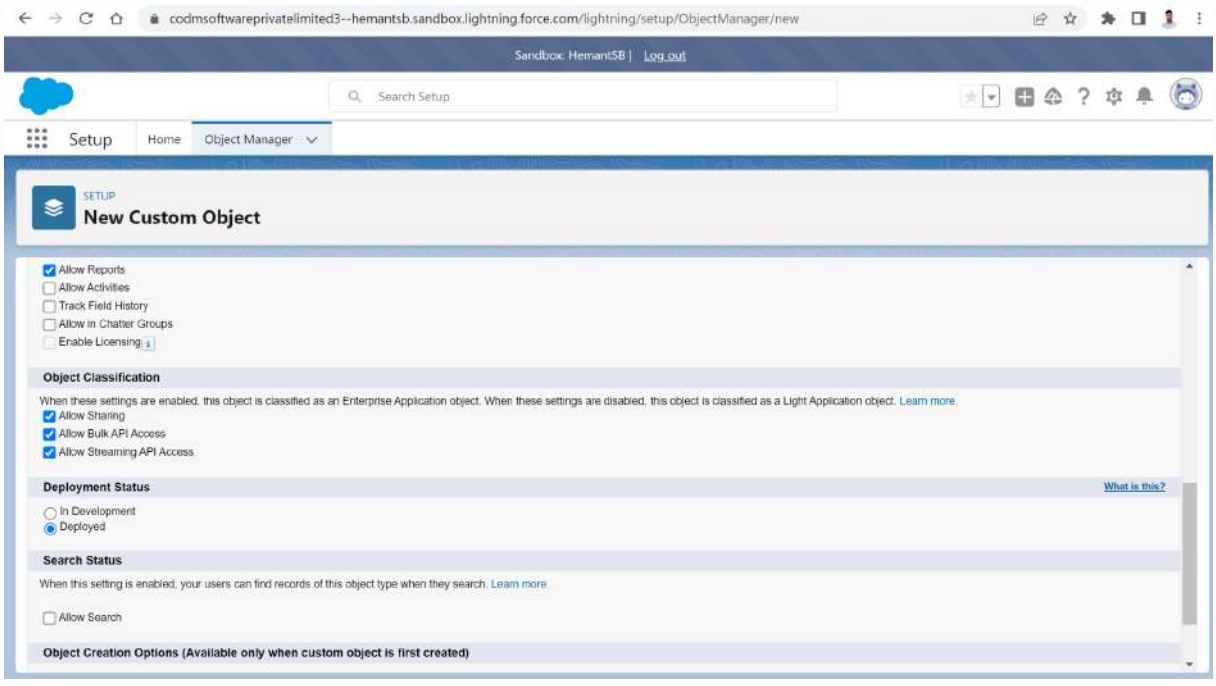
2. Click the **Object Manager** tab.
3. Click **Create** > **Custom Object** in the top-right corner.

4. In the *Label* section, enter whatever you want to call your custom object. The **Object Name** and **Record Name** fields will auto-fill with the same name.

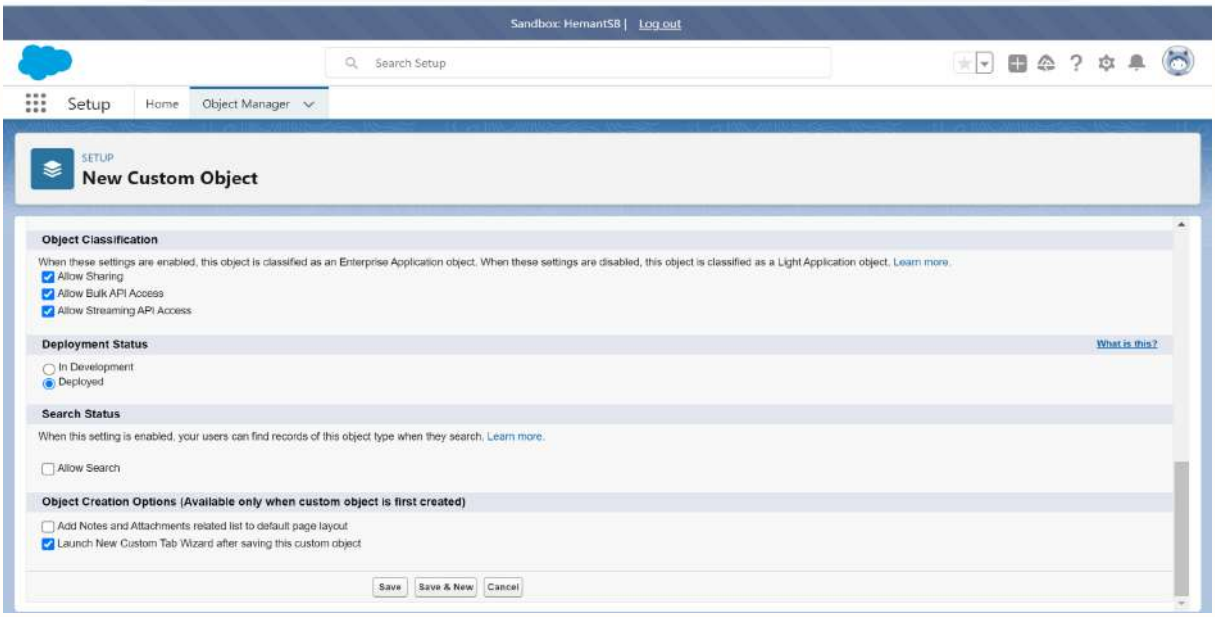
5. For **Plural Label**, enter the plural form of your custom object name



ENABLE THISOPTIONAL FEATURES IF YOU WANT TO :



6. Scroll to the bottom of the page, and select the **checkbox** Launch Custom Tab Wizard after saving this custom object. Selecting this box will add your custom object as a tab in Salesforce.

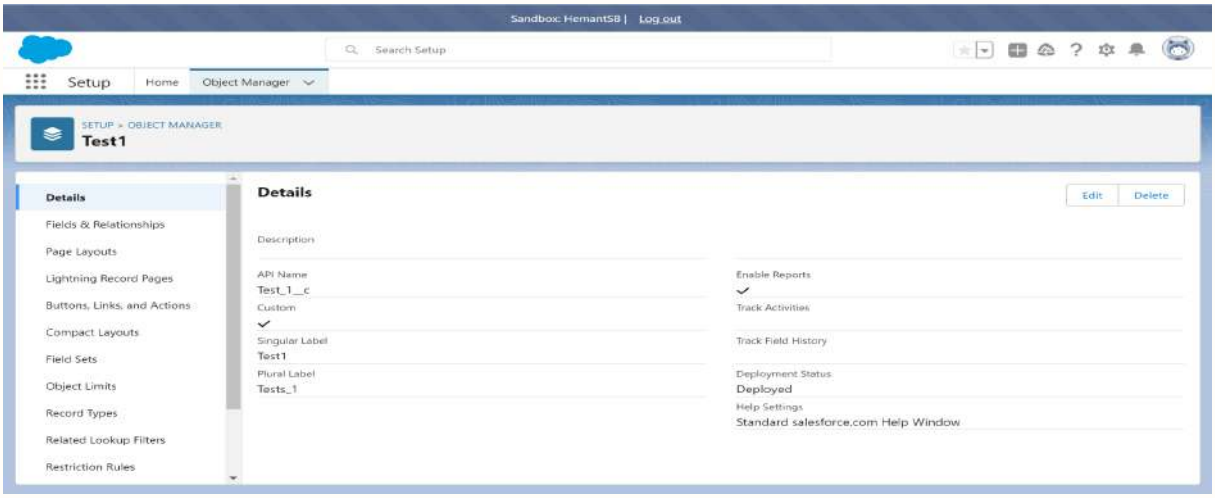


7. Click **Save.**

On the *New Custom Object Tab* page, click the **Tab Style** field, and choose a style. The style sets the icon to display in the UI for the object.

8. Click **Next**, **Next**, and **Save**.

In Object Manager it will appear like this :



NOTE：A custom object will always have a postfix__c , We can have maximum of 2000 custom object

What Are Fields ?

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields in Salesforce:

- **Standard Field :** Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field.

  There are 4 predefined Fields That Is:

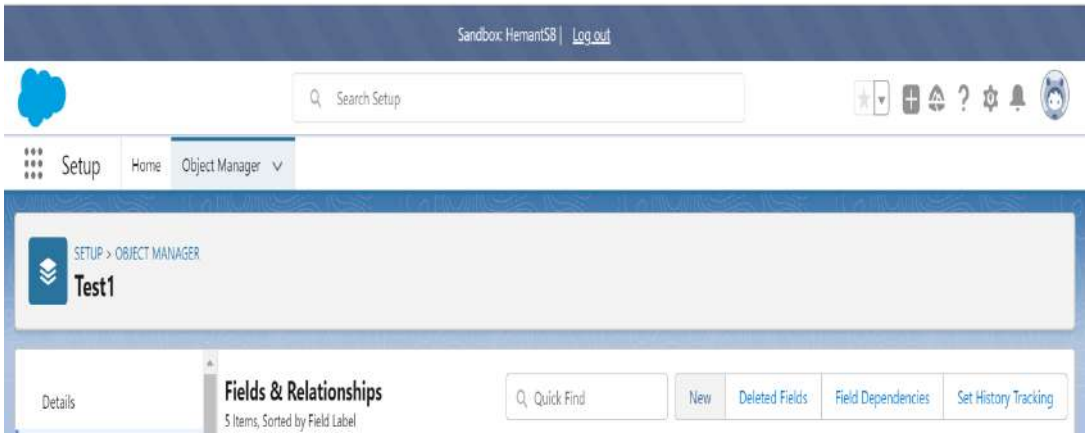
  - Created By
  - Owner
  - Last Modified By
  - Field Made during Object Creation

- **Custom Field :** Custom field Are those field Which we create according to our need of an organization

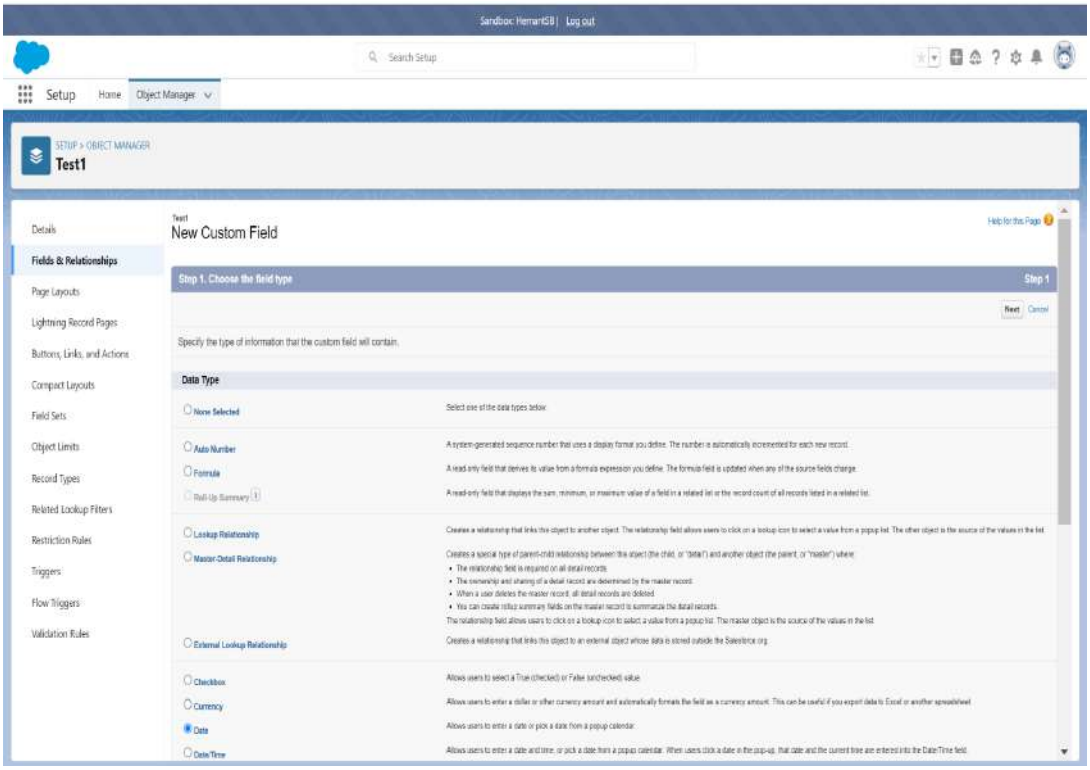
How to create a custom Field in Salesforce Objects :

Steps to create a custom field :

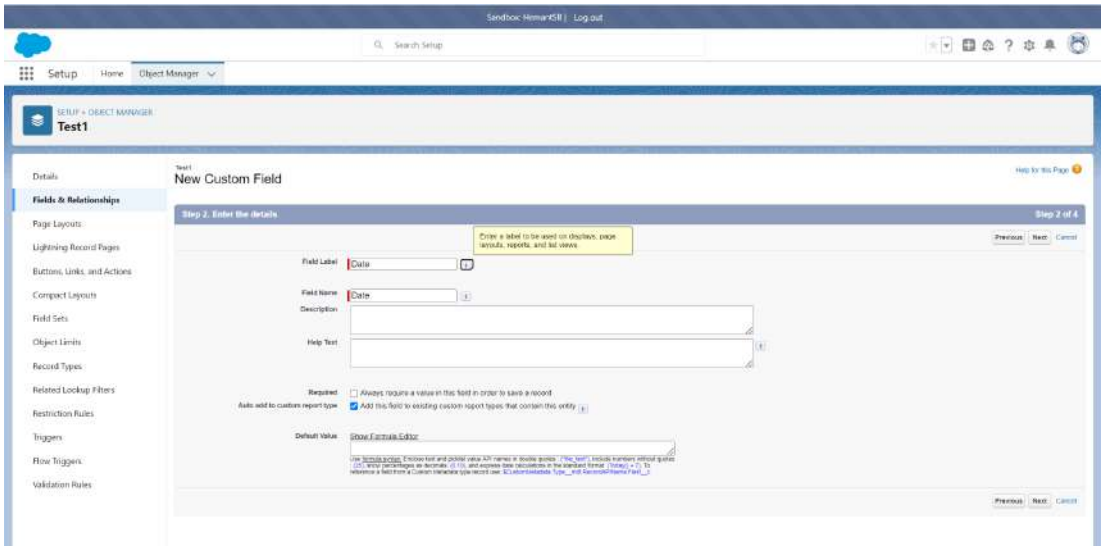
1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship



3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the Date data type, users can enter a date or pick one from a popup calendar.



4. Click Next, and then fill out the Field Label, Field Name, input format (text, numbers, decimals, and so on), and description, and click Next.



5. Select the field's visibility and edit access.

6. Click Next. Then click Save.

Basic Terms Used In Salesforce :

1. **Record :** An item you are tracking in your database; if your data is like a spreadsheet, then a record is a row on the spreadsheet

2. **Field :** A place where you store a value, like a name or address; using our spreadsheet example, a field would be a column on the spreadsheet

3. **Org :** Short for "organization," the place where all your data, configuration, and customization lives. You log in to access it. You might also hear this called "your instance of Salesforce"

4. **App :** A set of fields, objects, permissions, and functionality to support a business process

5. **Accounts :** Accounts are the companies you're doing business with. You can also do business with individual people (like solo contractors) using something called Person Accounts.

6. **Contacts :** Contacts are the people who work at an Account.

7. **Leads :** Leads are potential prospects. You haven't yet qualified that they are ready to buy or what product they need

8. **Opportunities :** Opportunities are qualified leads that you've converted. When you convert the Lead, you create an Account and Contact along with the Opportunity.

What Are The Different Types of Data Type / Field type in Salesforce ?

There Are 24 total Different Types of Data Type / Field type in Salesforce Explained below With Example :

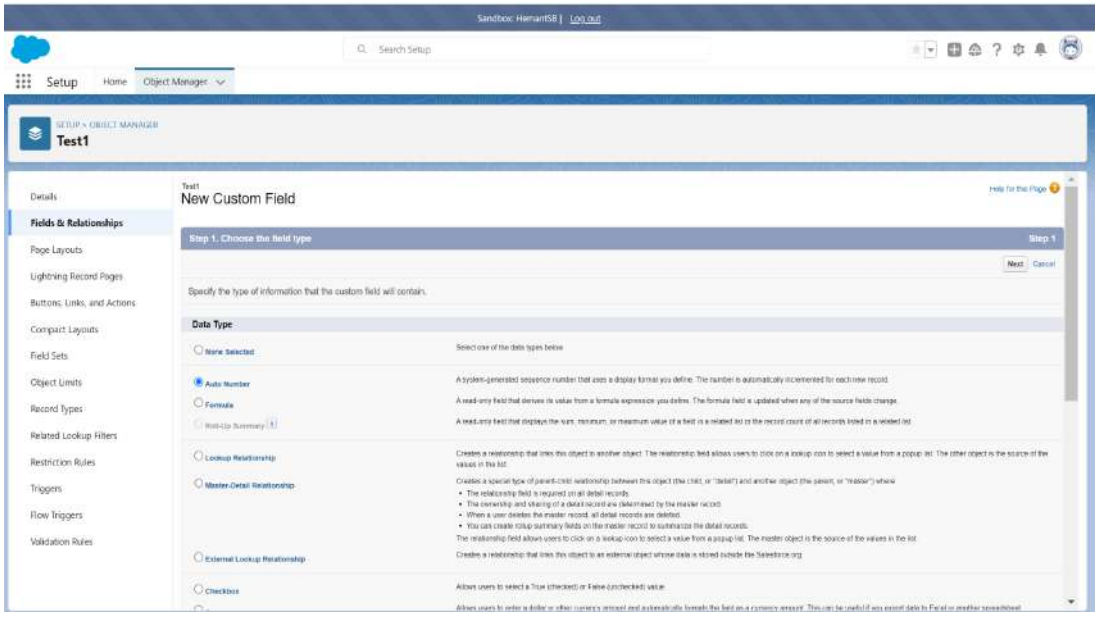
Auto Number — A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

1. Click the **Object Manager** tab

2. In object Manager Go to Field & Relationship

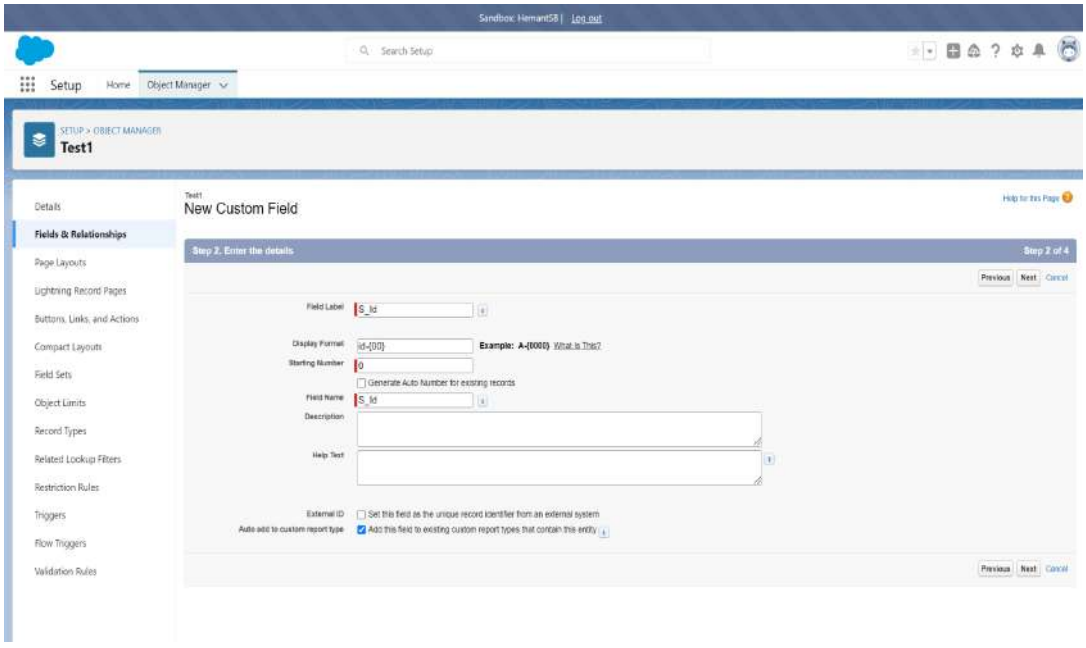
3. Click on New

4. Choose The Data type **Auto Formula** and click on **Next**

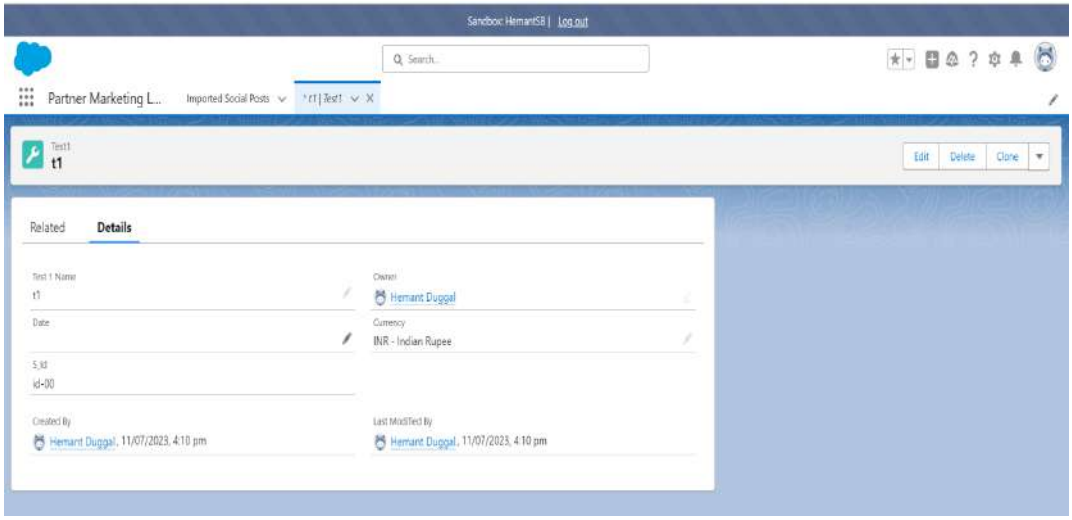


5. Enter Field label and Display Format and a starting number

6. Click On Next , Next And Save

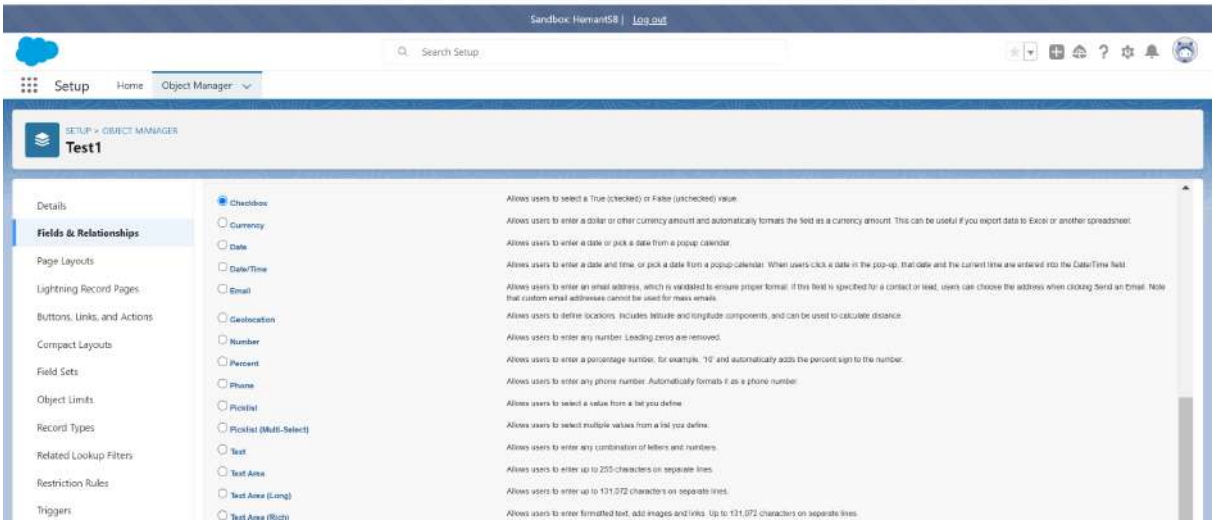


In Records We Can see This :

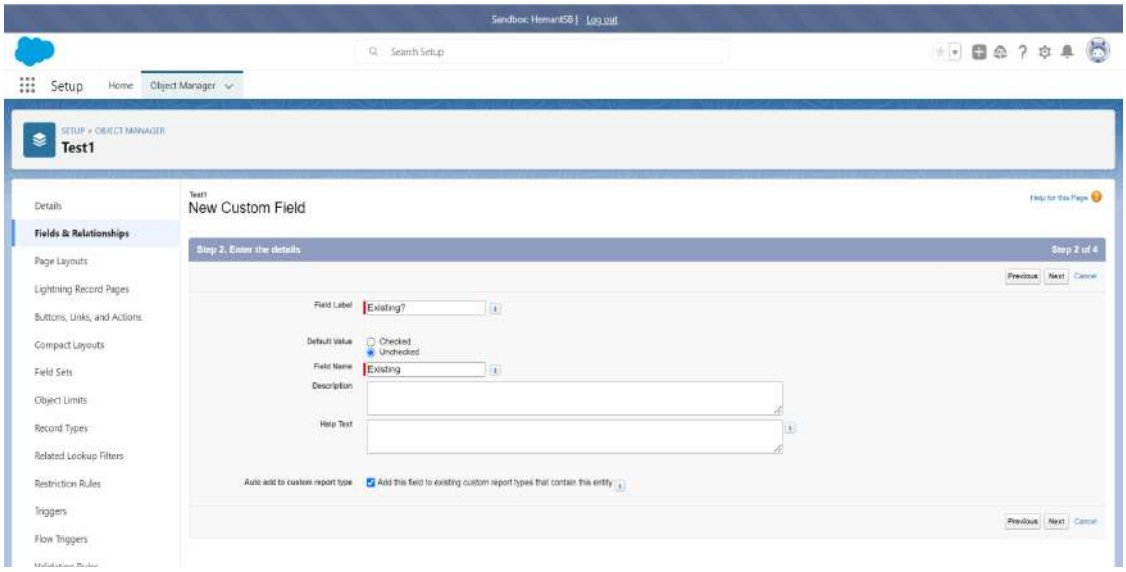


Checkbox : Allows users to select a True (checked) or False (unchecked) value.

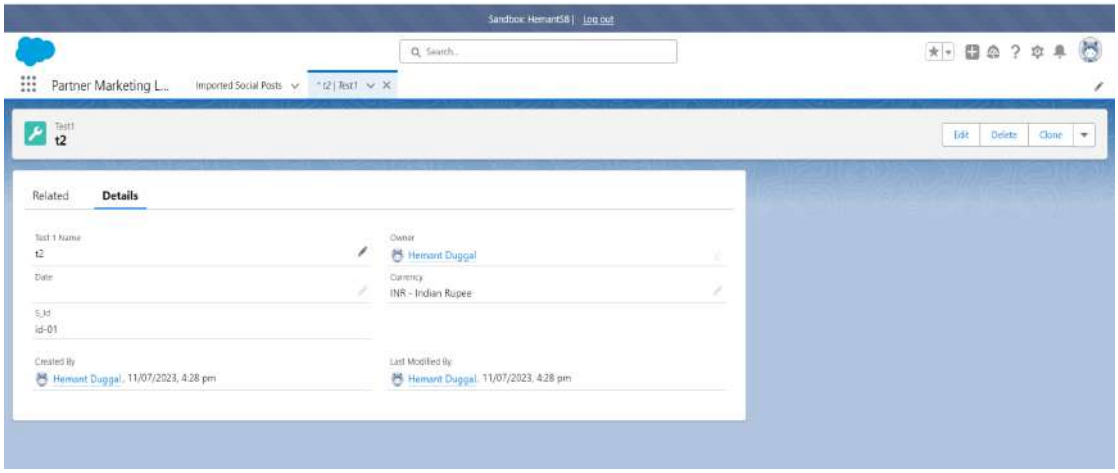
1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship
3. Click on New
4. Choose The Data type **CheckBox** and click on **Next**



5. Enter Field label and Field Name and Click On **Next , Next and Save.**

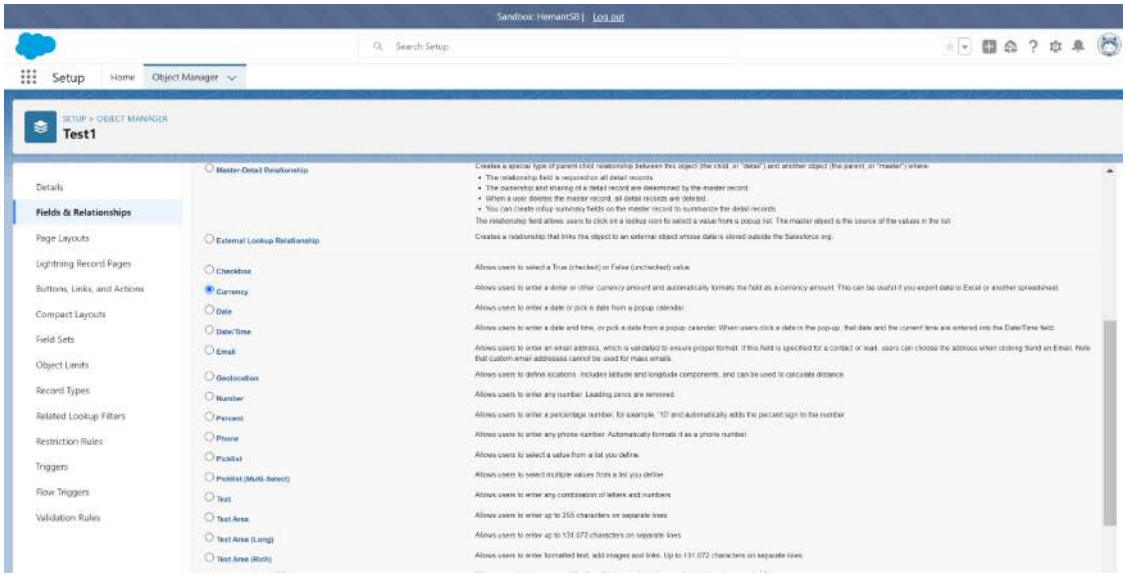


6. It will look like This in **Records :**

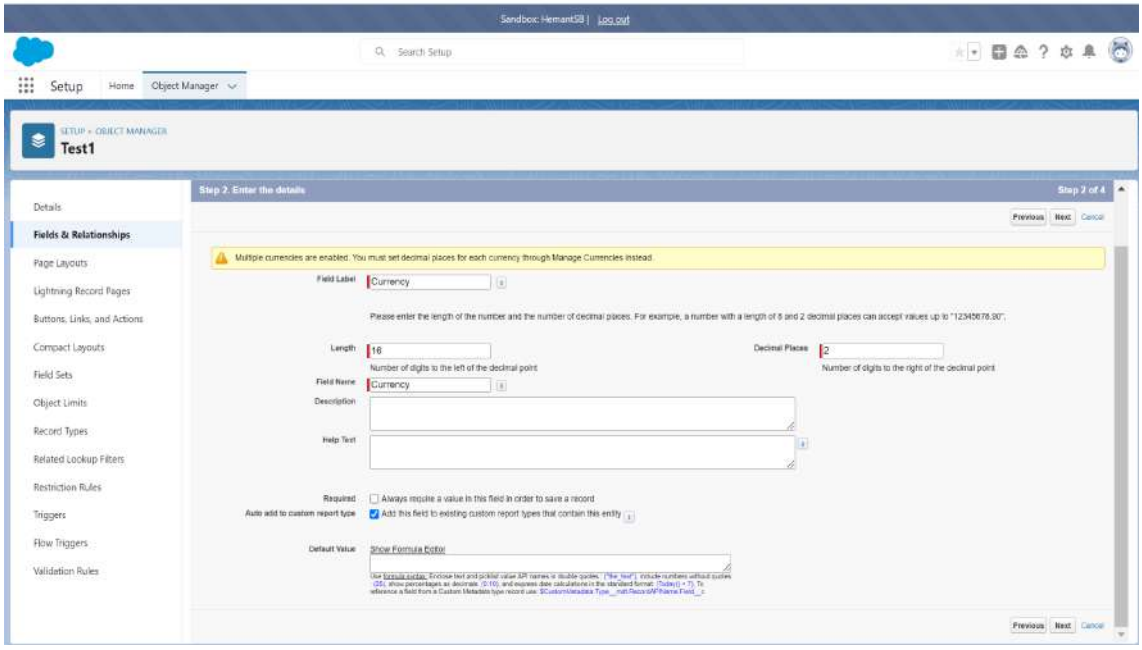


Currency : Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet

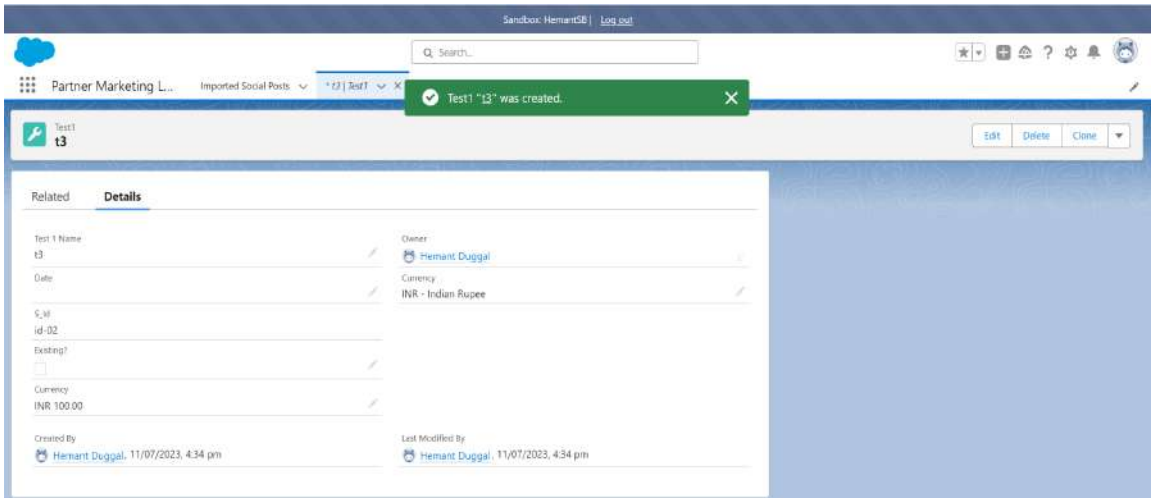
1. Click the **Object Manager tab**
2. In object Manager Go to Field & Relationship
3. Click on New
4. Choose The Data type **Currency** and click on **Next**



5. Enter Field label and Field Name and Click On Next , Next and Save.



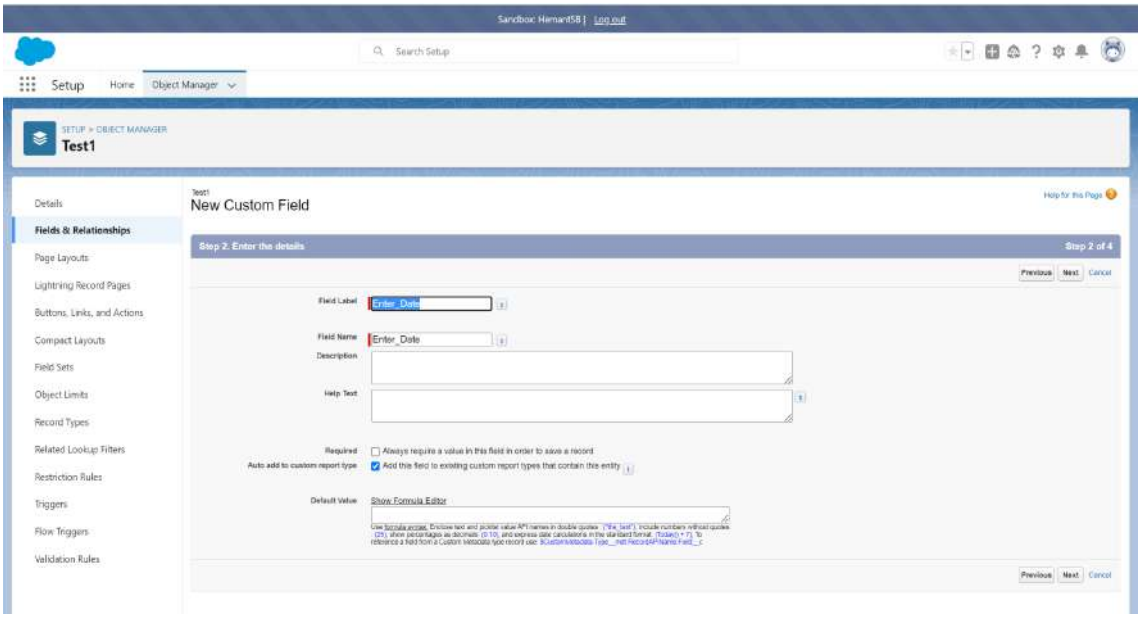
6. It will look like This in Records :



Date : Allows users to enter a date or pick a date from a popup calendar**.**

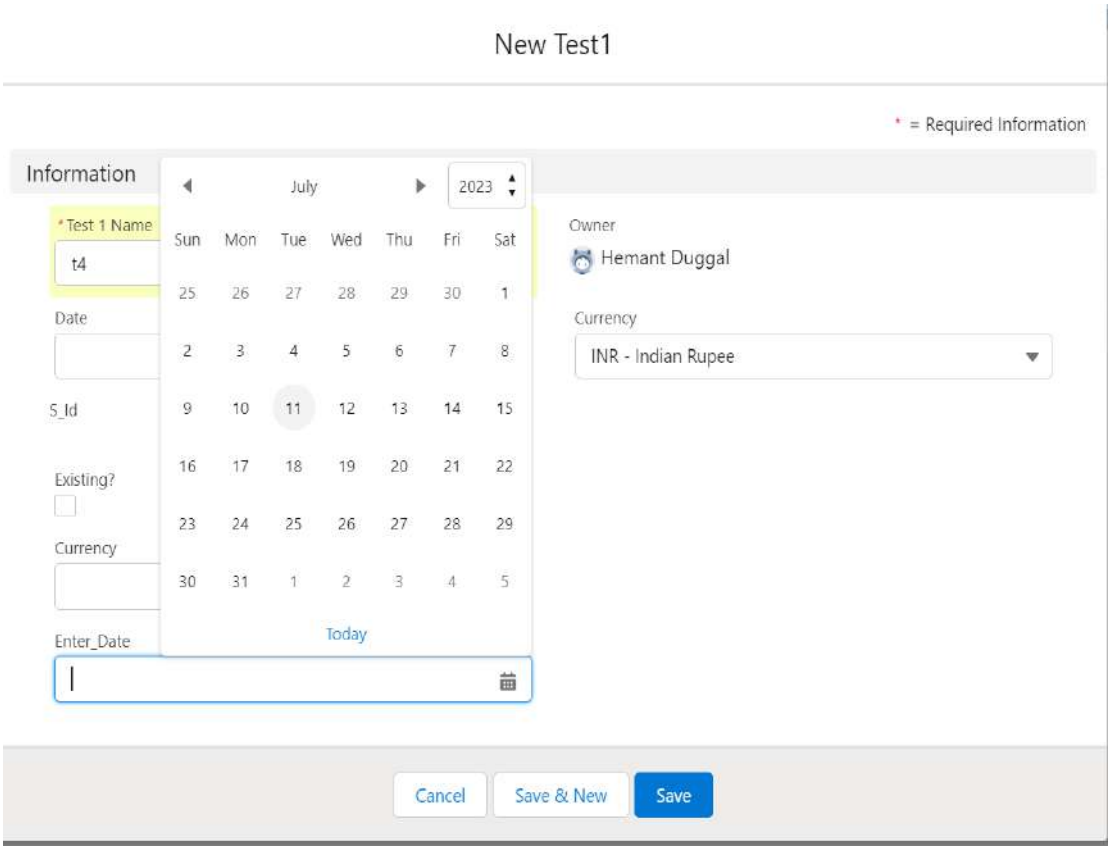
1. Click the **Object Manager tab**
2. In object Manager Go to Field & Relationship
3. Click on New

4. Choose The Data type **Date** and click on **Next**

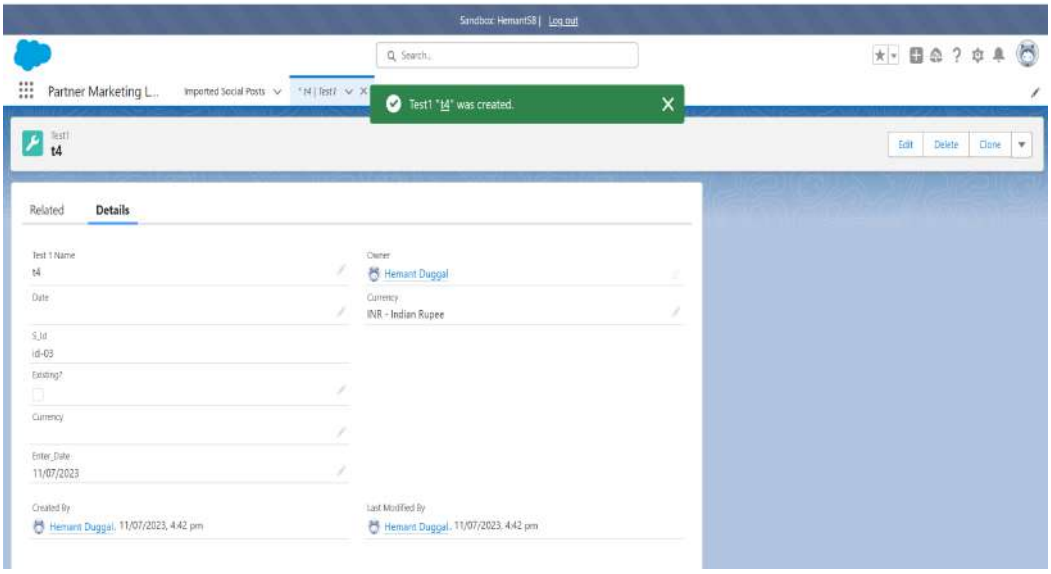


5. Enter Field label and Field Name and Click On **Next , Next and Save**.

6. In Entering Record Pick A Date From Calendar and Then **Save It**

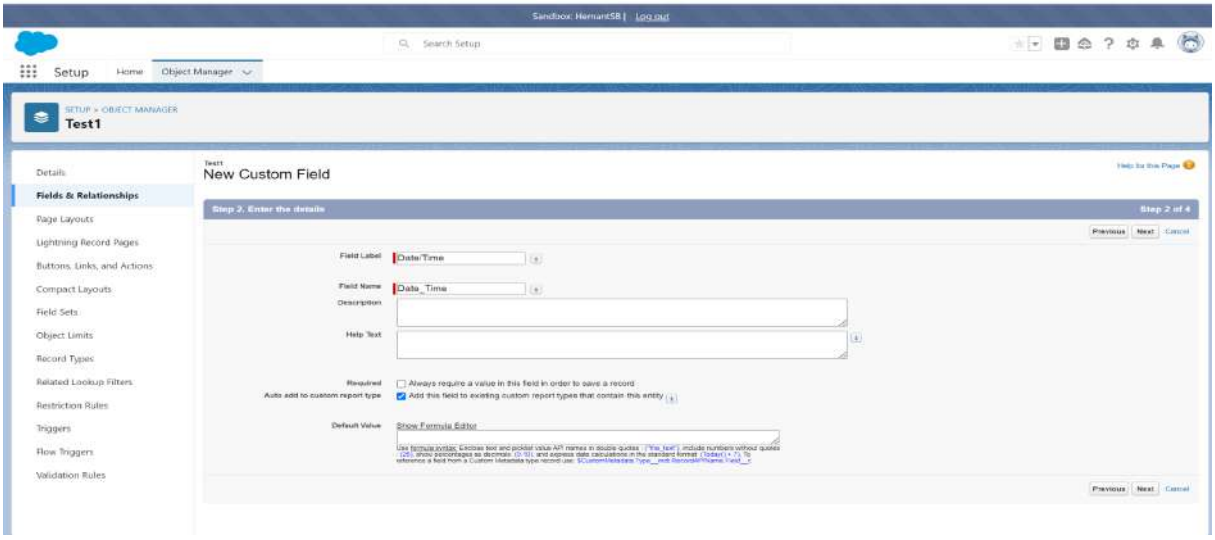


7. It will look like This in Records :



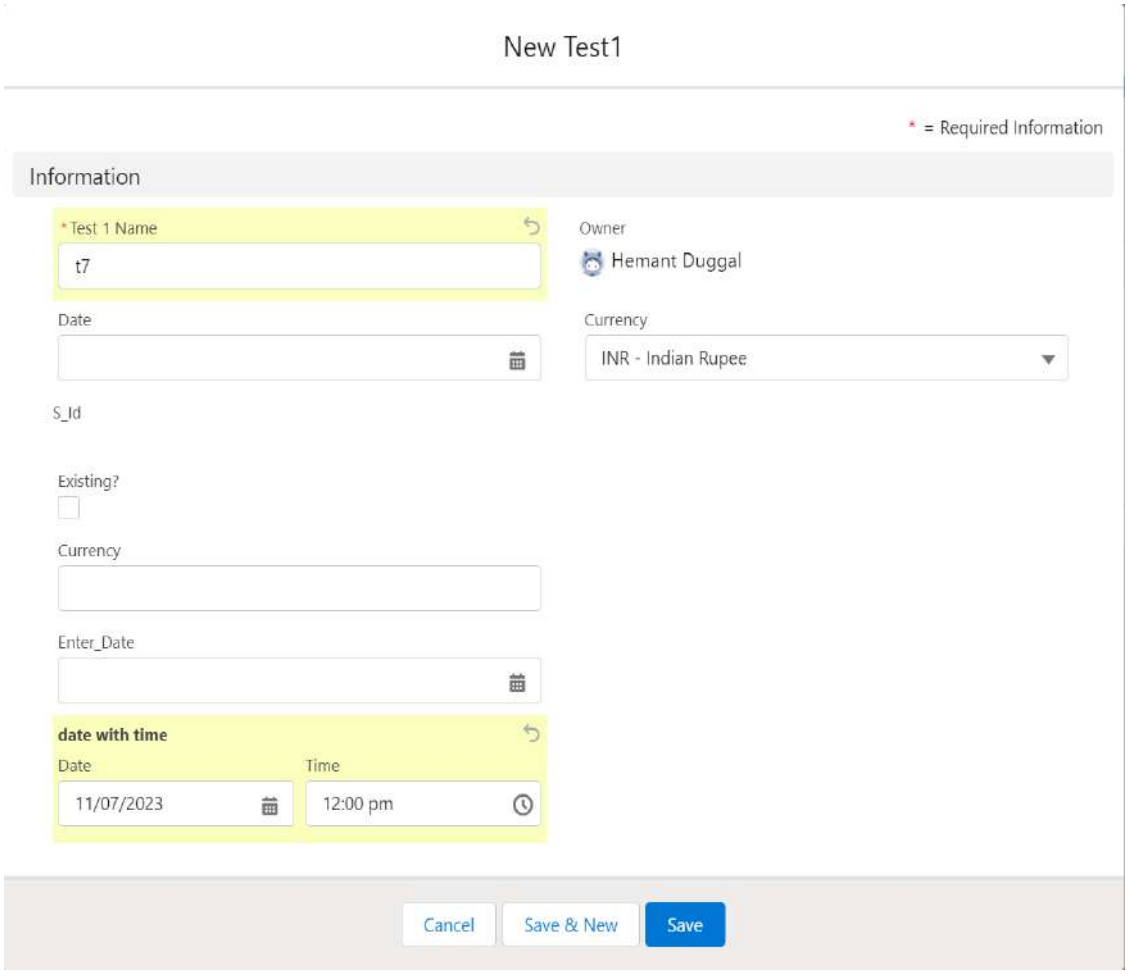
Date/Time : Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

1. Click the Object Manager tab
2. In object Manager Go to Field & Relationship
3. Click on New
4. Choose The Data type **Date/time** and click on **Next**

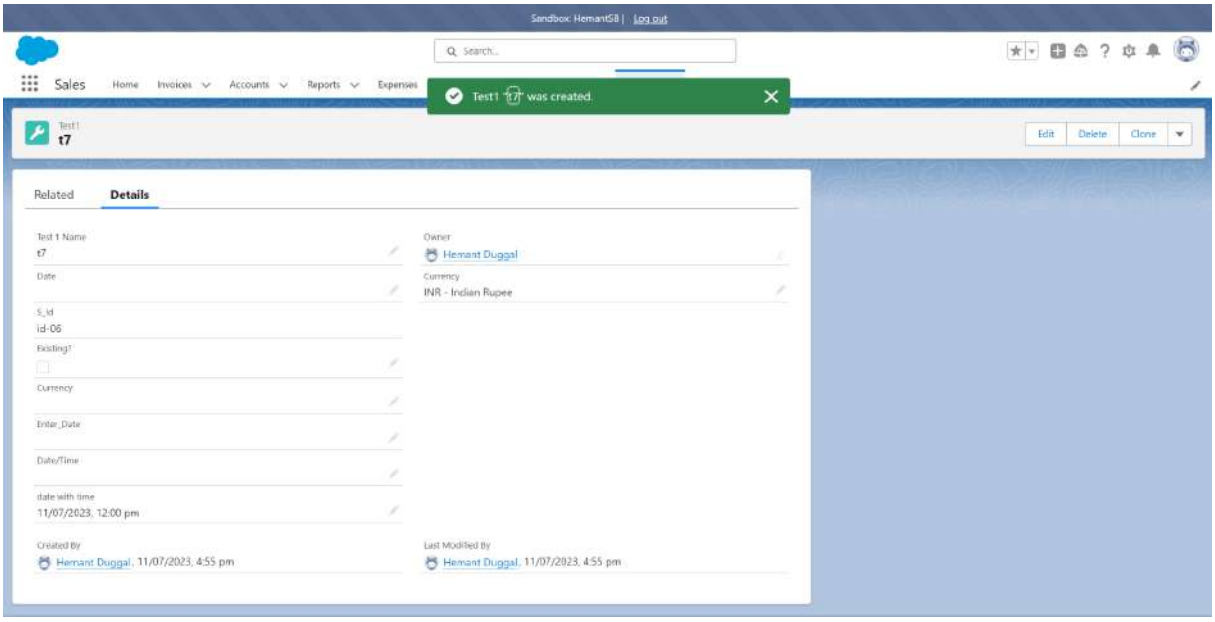


5. Enter Field label and Field Name and Click On **Next , Next and Save**.

6. In Entering Record Pick A Date From Calendar and Then **Save It**

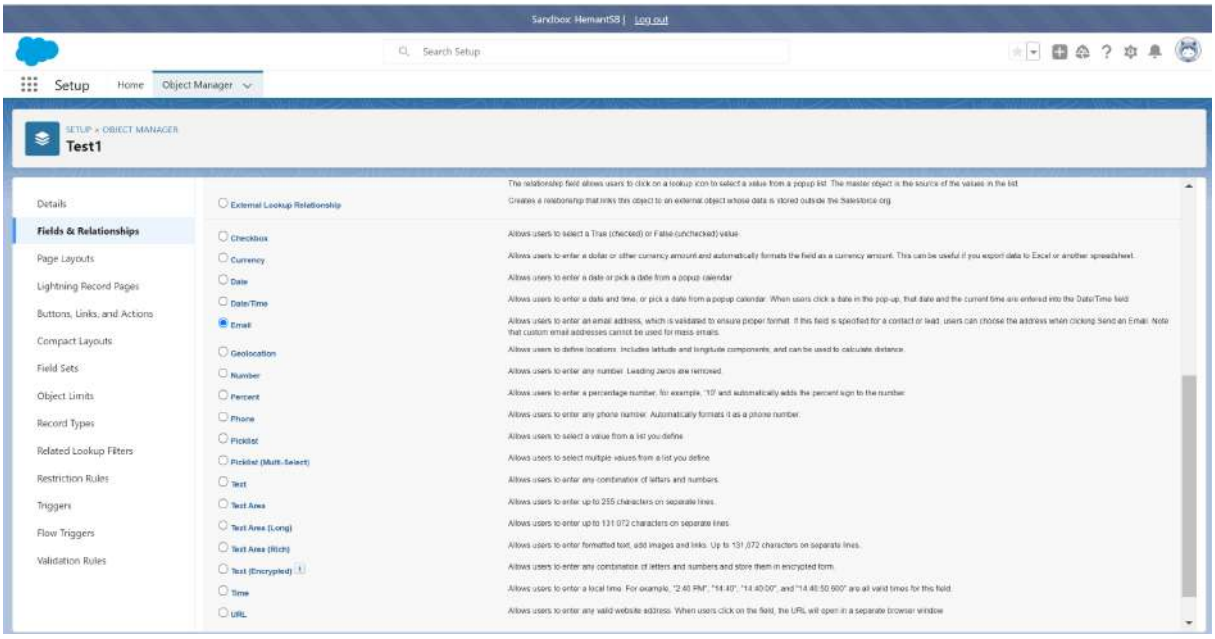


7. It will look like This in Records :

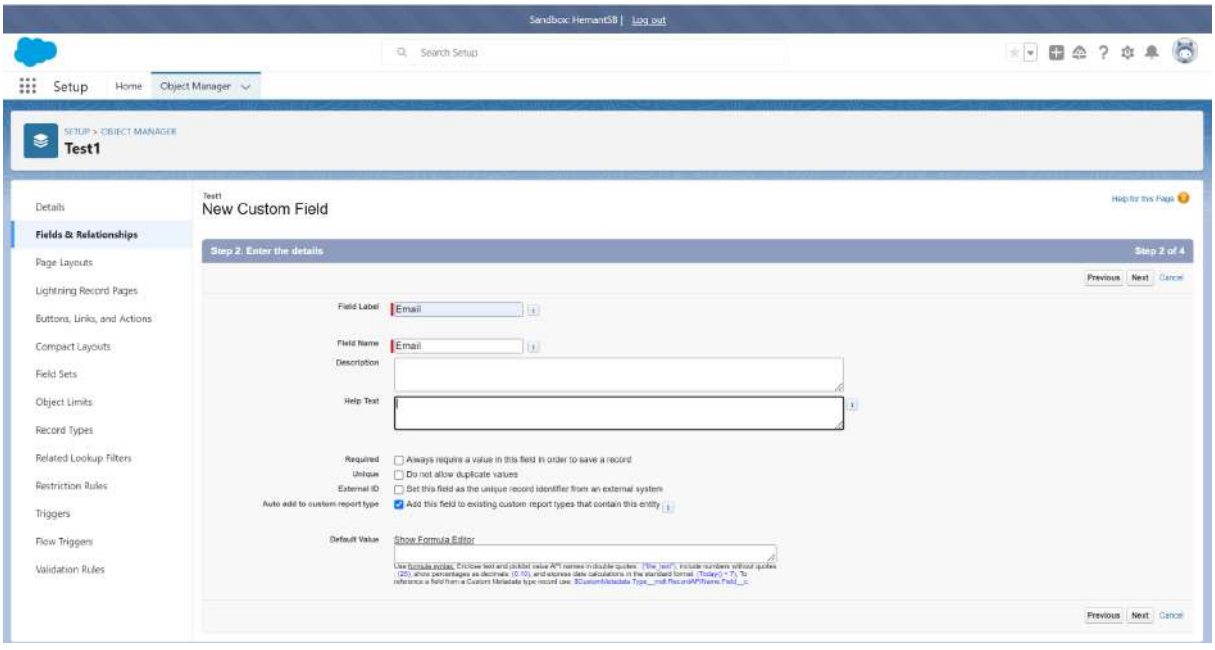


Email : Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

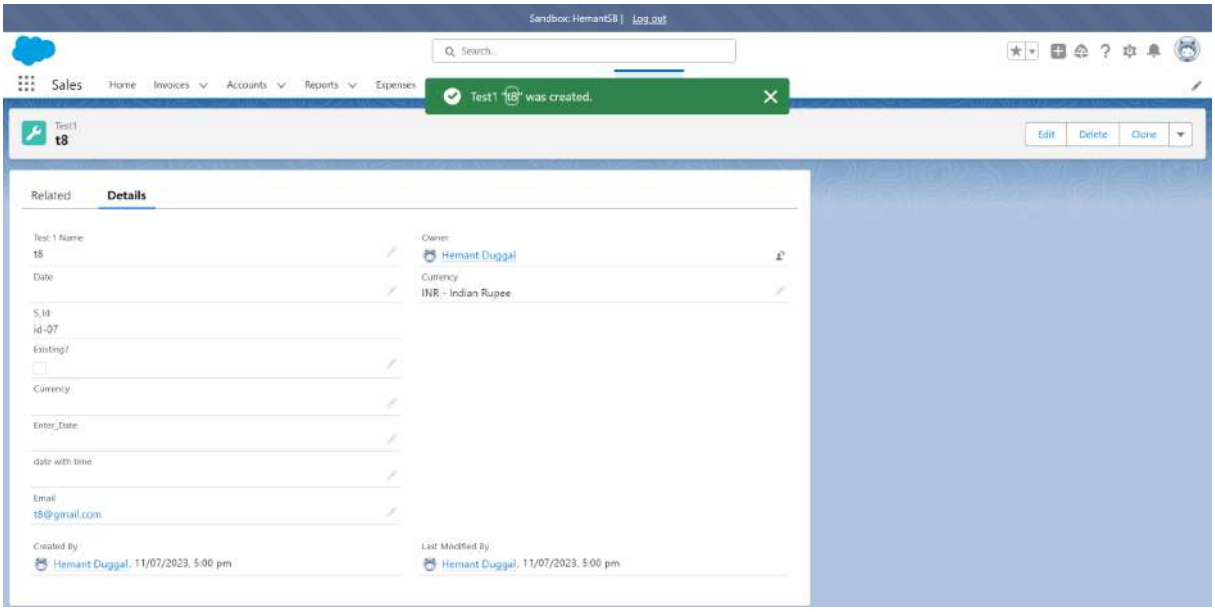
1. Click the Object Manager tab
2. In object Manager Go to Field & Relationship
3. Click on New
4. Choose The Data type **Email** and click on **Next**



5. Enter Field label and Field Name and Click On **Next , Next and Save.**

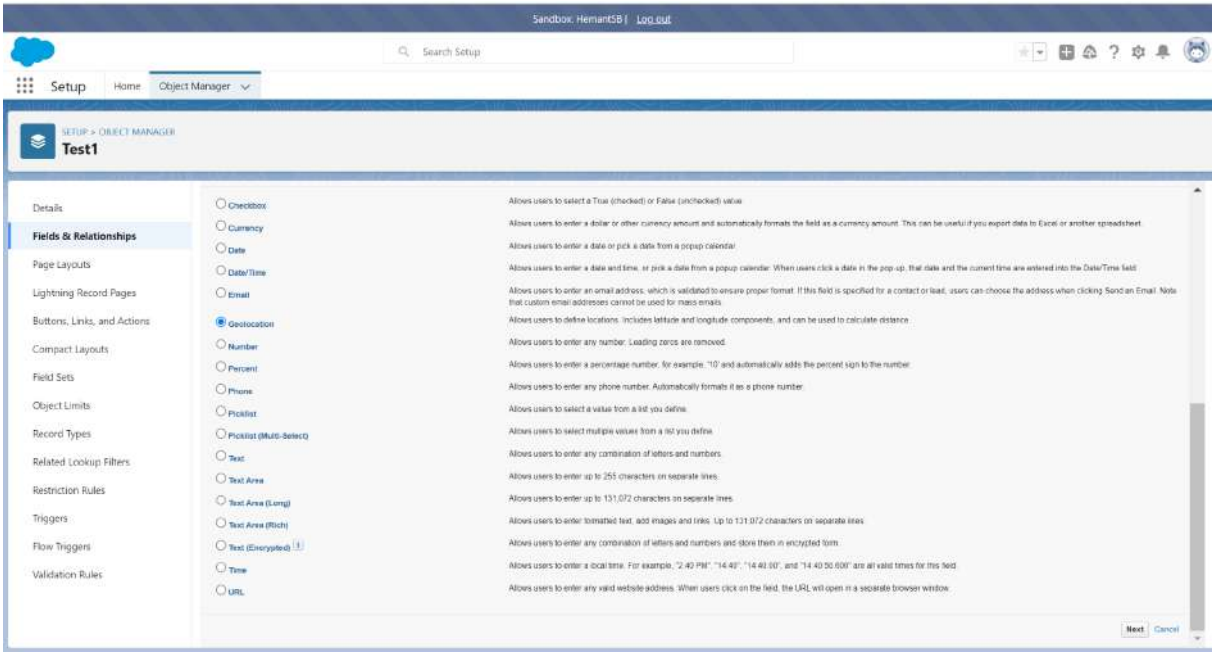


6. It will look like This in Records :

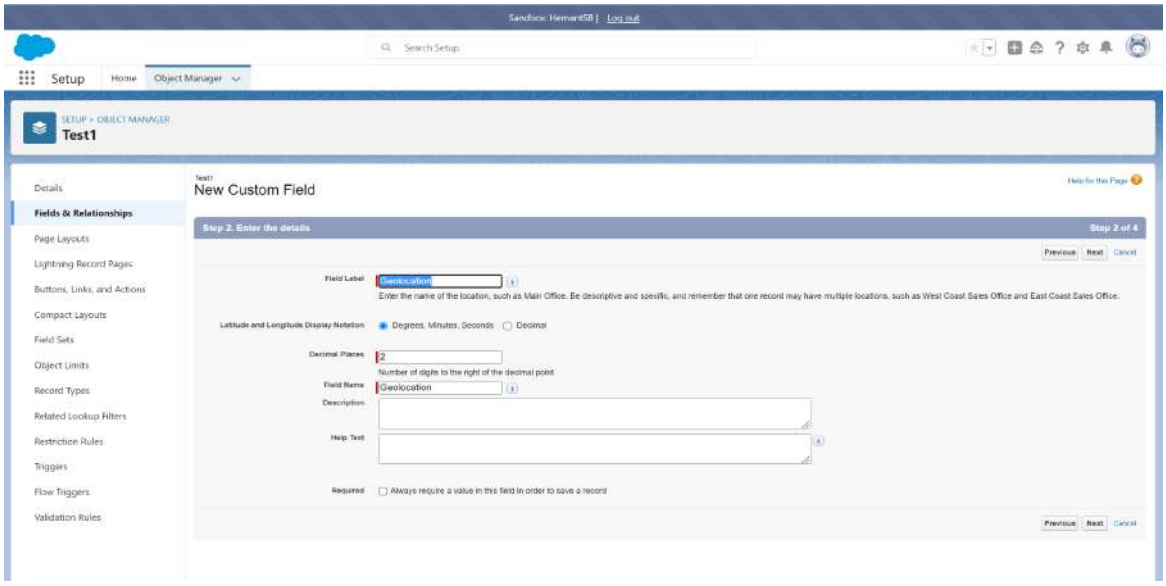


Geolocation : Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

1. Click the Object Manager tab
2. In object Manager Go to Field & Relationship
3. Click on New
4. Choose The Data type **Geolocation** and click on **Next**

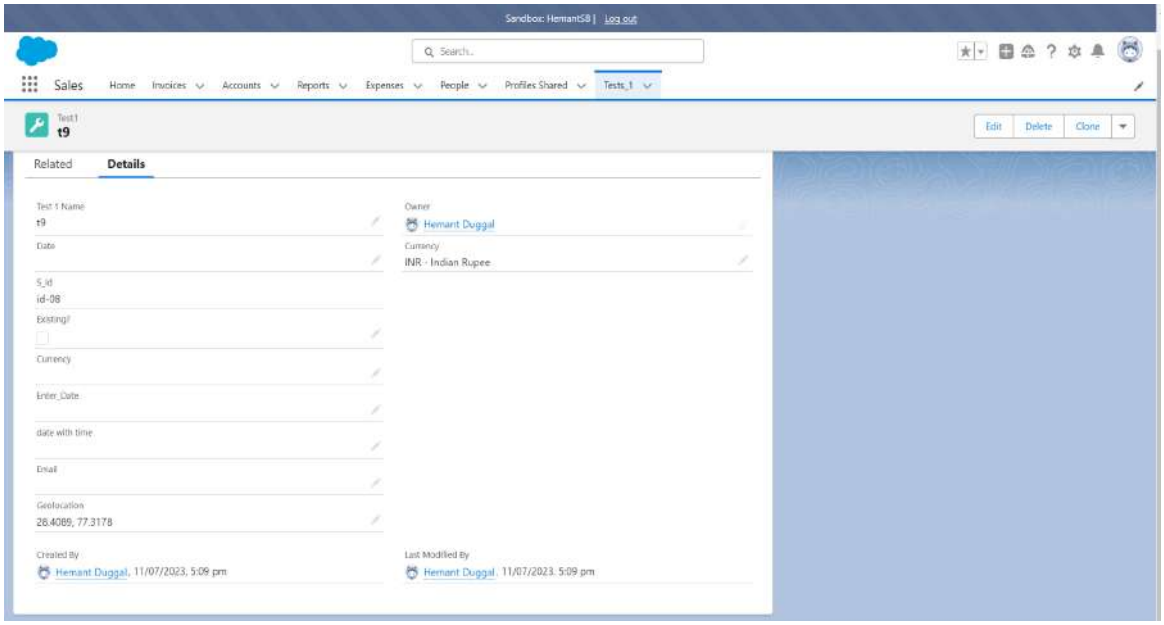


5. Enter Field label and Field Name and Decimal Places and Click On **Next , Next and Save.**



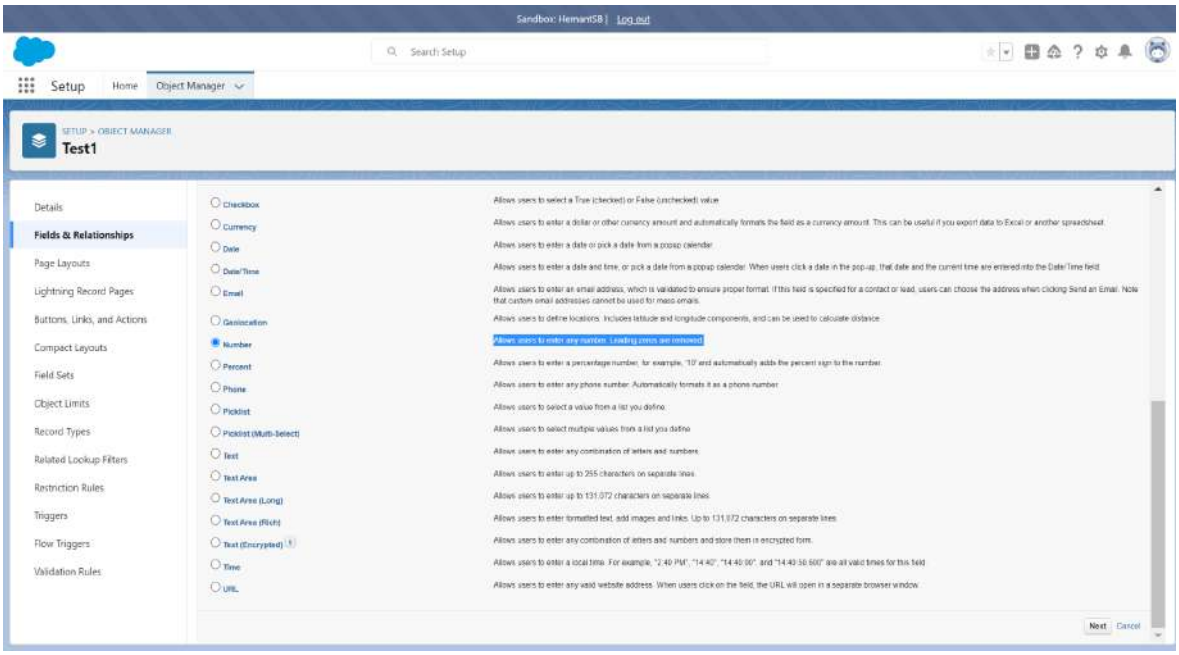
6. Enter longitude and latitude In Record

7. It will look like This in Records :



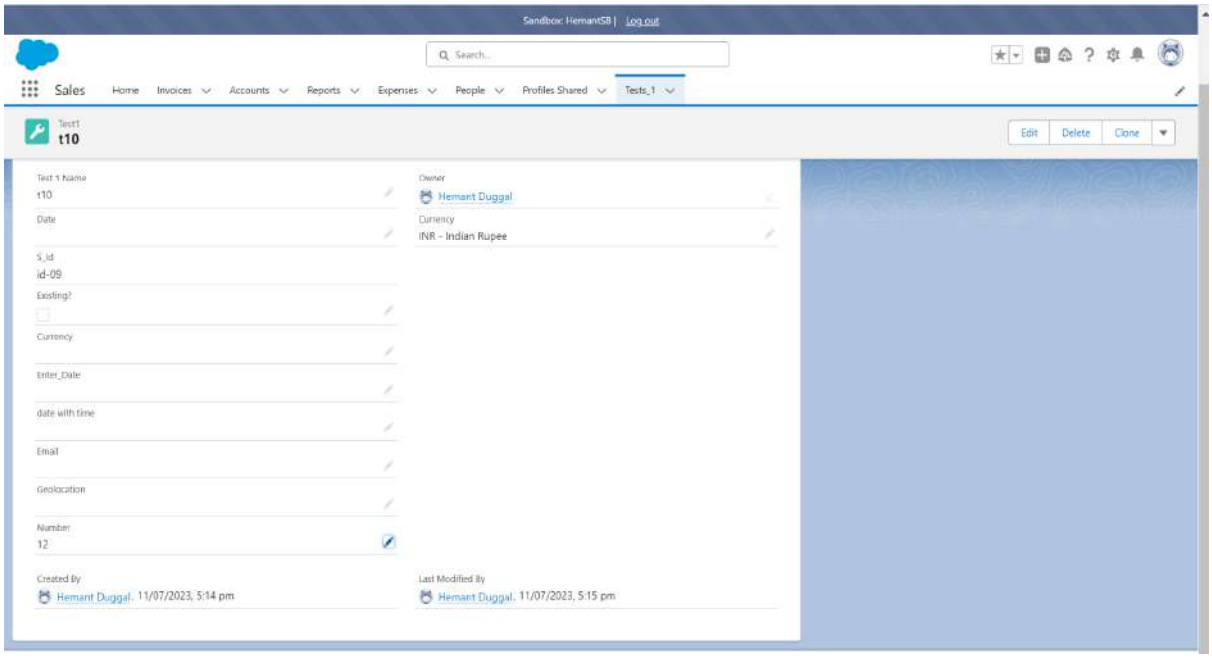
Number : Allows users to enter any number. Leading zeros are removed.

1. Click the Object Manager tab
2. In object Manager Go to Field & Relationship
3. Click on New
4. Choose The Data type **Number** and click on Next



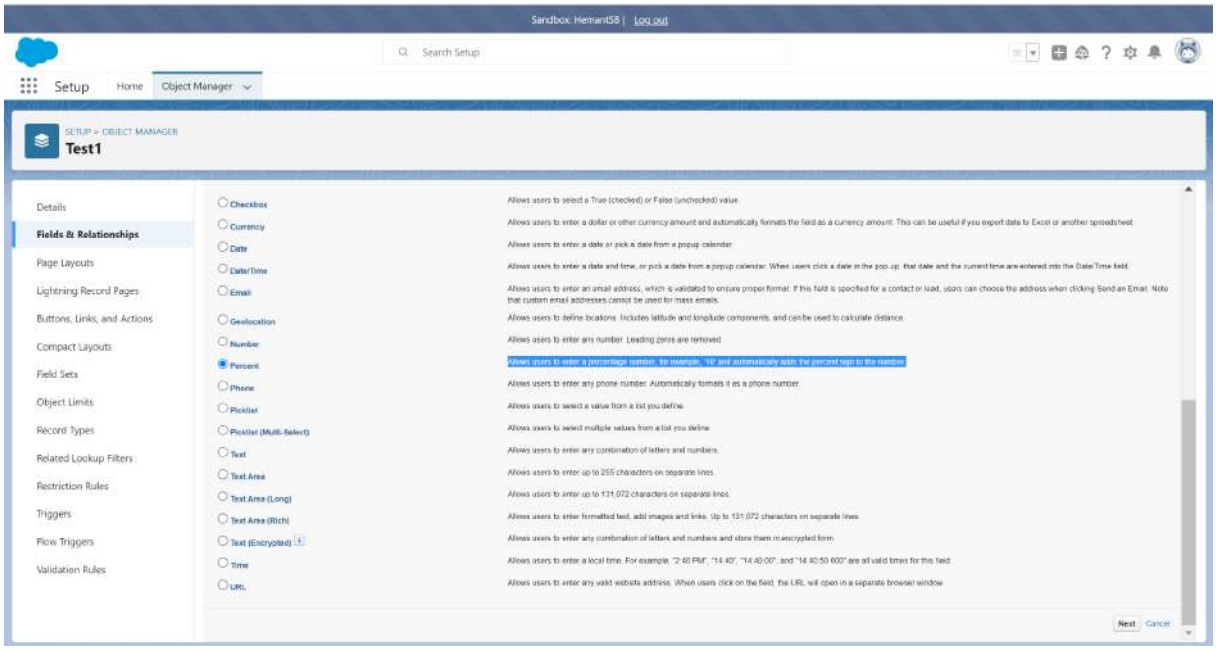
5. Enter Field label and Field Name and Length(max) and Decimal Places and Click On Next , Next and Save.

6. It will look like This in Records :

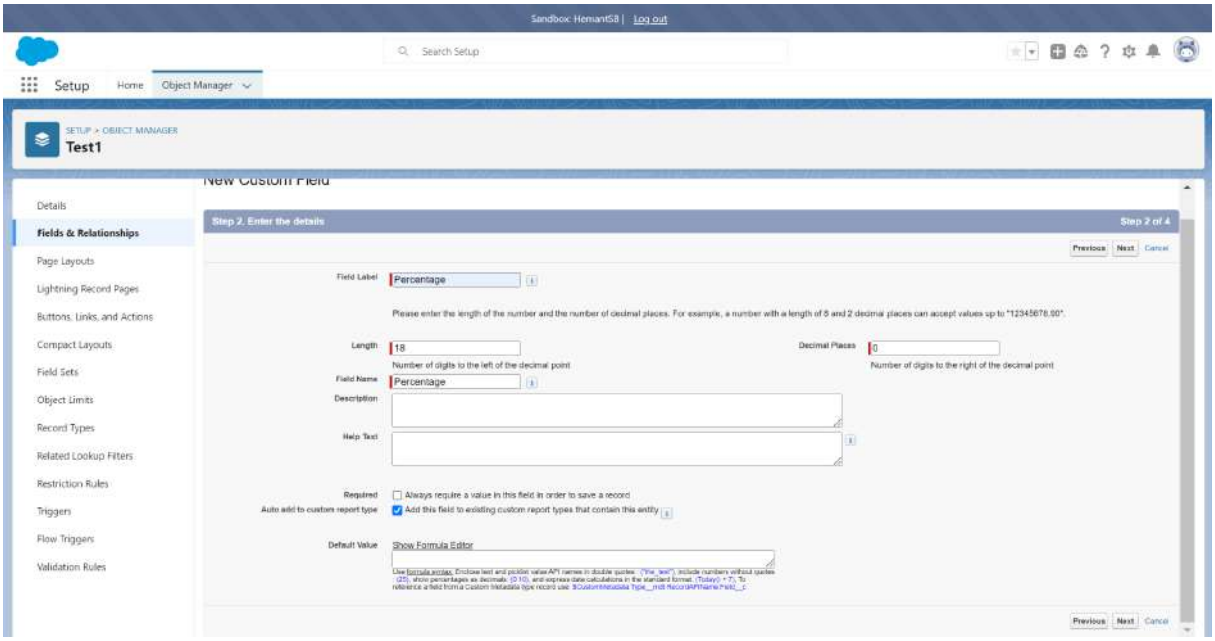


Percent : Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number

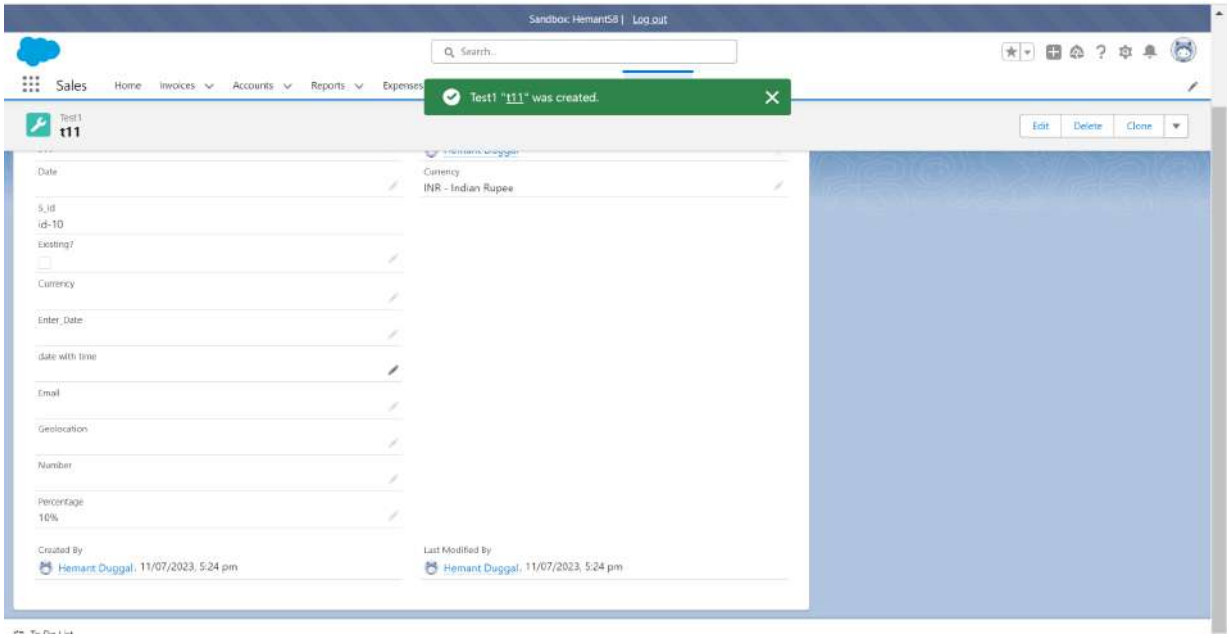
1. Click the Object Manager tab
2. In object Manager Go to Field & Relationship
3. Click on New
4. Choose The Data type **Percent** and click on **Next**



5. Enter Field label and Field Name and Click On Next and Length(max) and Decimal Places , Next and Save.

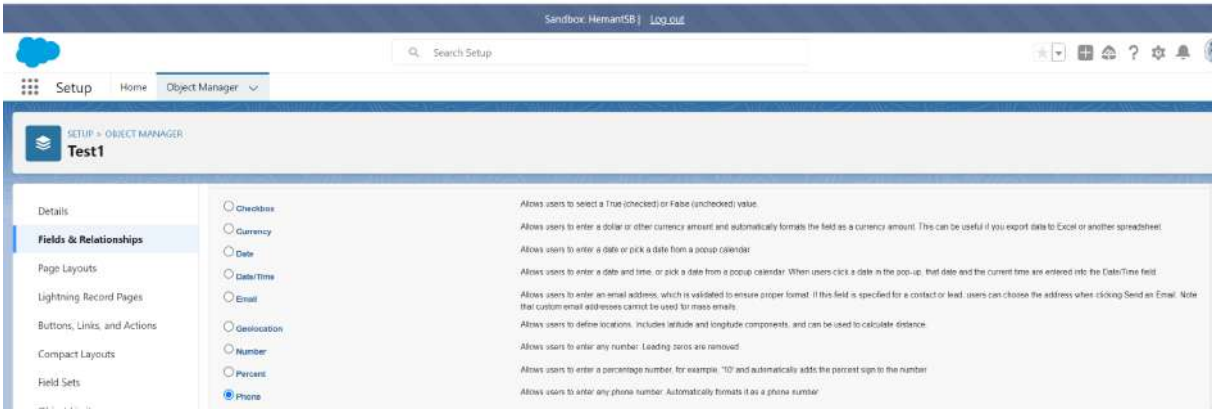


6. It will look like This in Records :

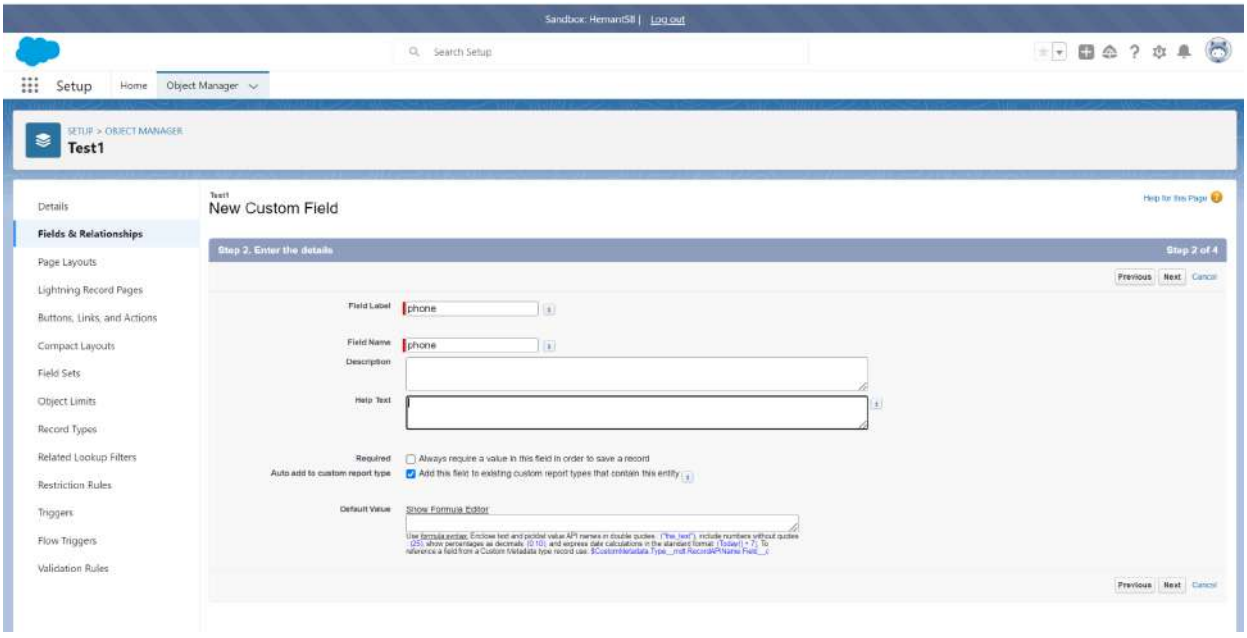


Phone : Allows users to enter any phone number. Automatically formats it as a phone number.

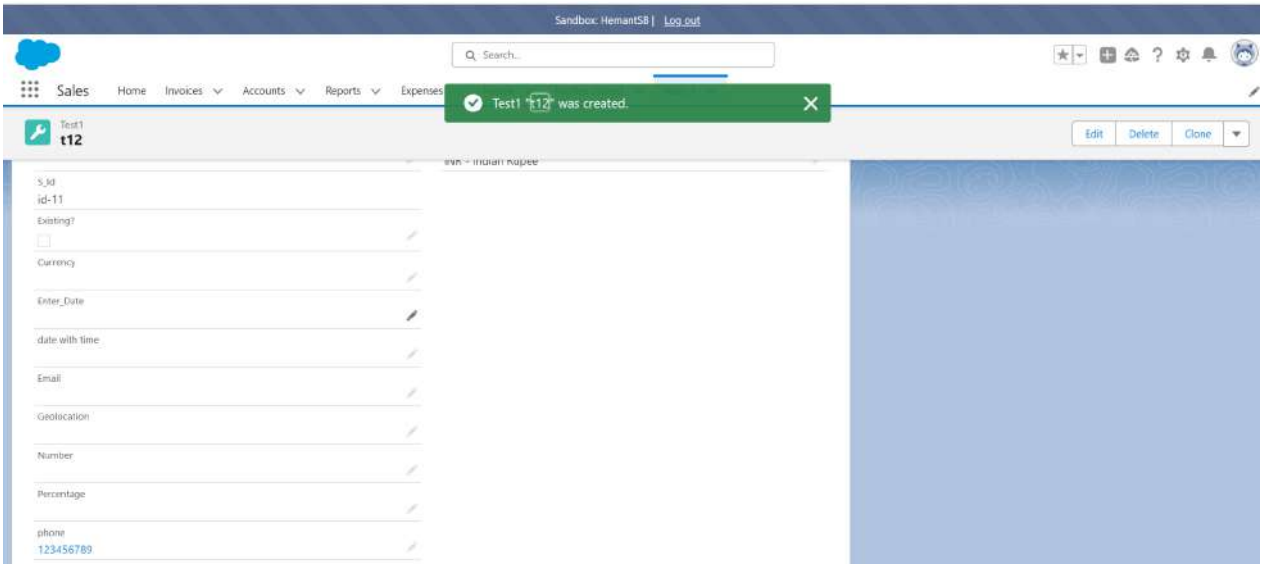
1. Click the Object Manager tab
2. In object Manager Go to Field & Relationship
3. Click on New
4. Choose The Data type **Phone** and click on **Next**



5. Enter Field label and Field Name and Click On **Next , Next and Save.**

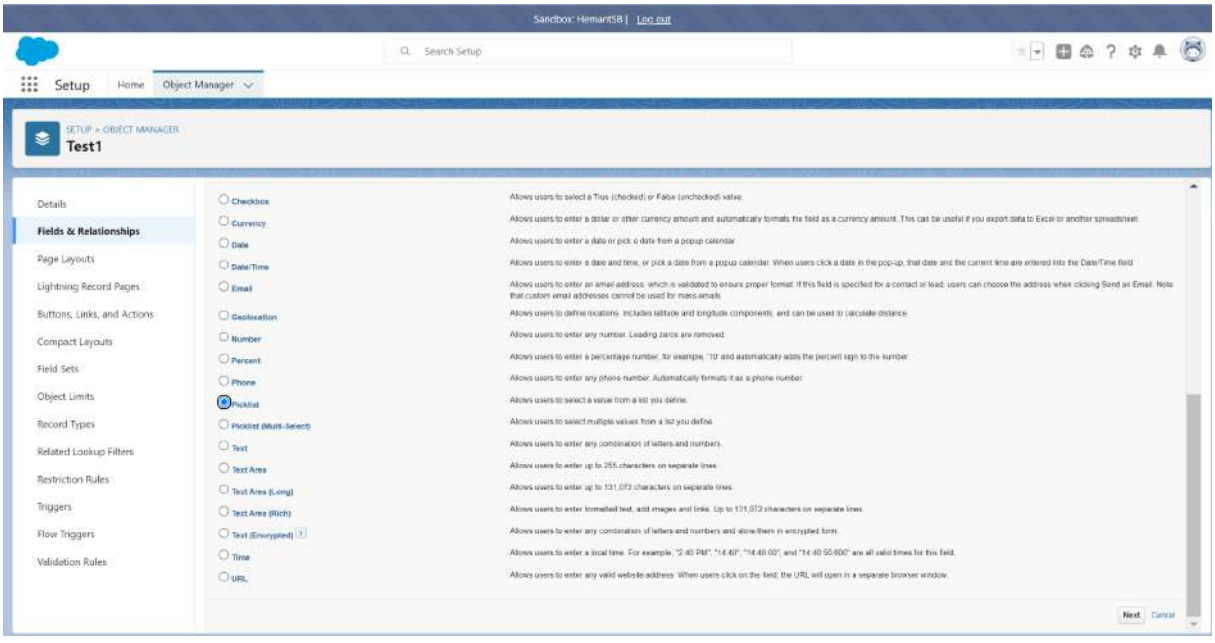


6. It will look like This in Records :



Picklist : It Allows users to select a value from a list you define.

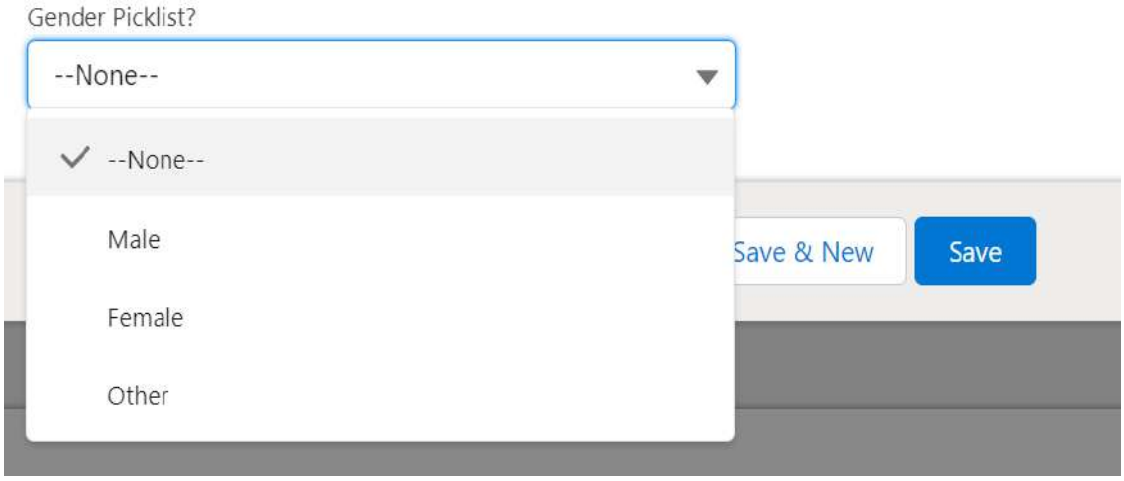
1. Click the Object Manager tab
2. In object Manager Go to Field & Relationship
3. Click on New
4. Choose The Data type Picklist and click on Next

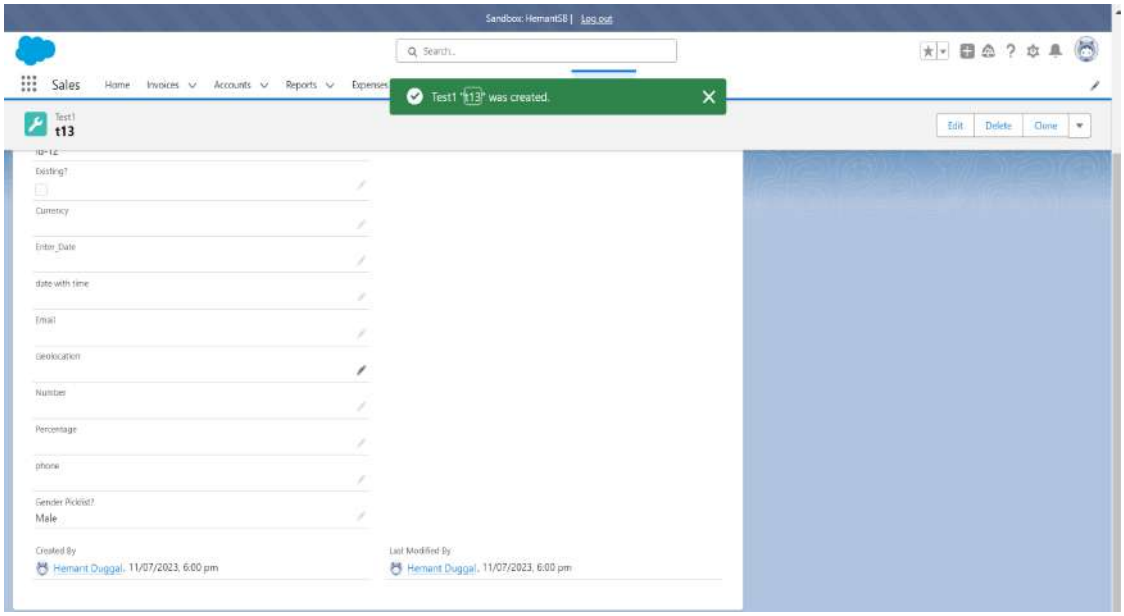


5. Enter Field label and Field Name and Click On values enter values, with each value separated by a new line. **Example Male ,Female ,Others**

6. Click On **Next , Next and Save**.

7. It will look like This in Records :





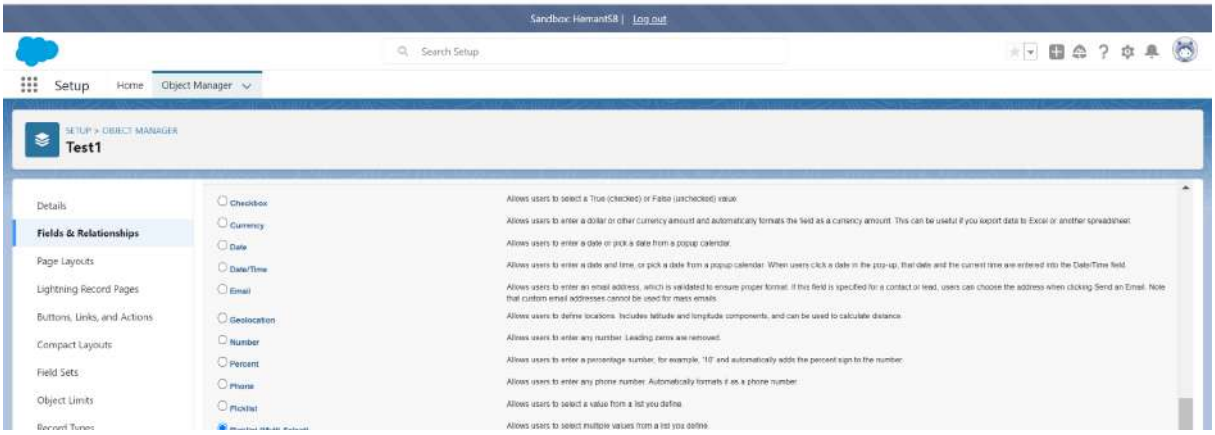
Picklist (Multiselect) : Allows User to select multiple values from a list you define.

1. Click the **Object Manager tab**

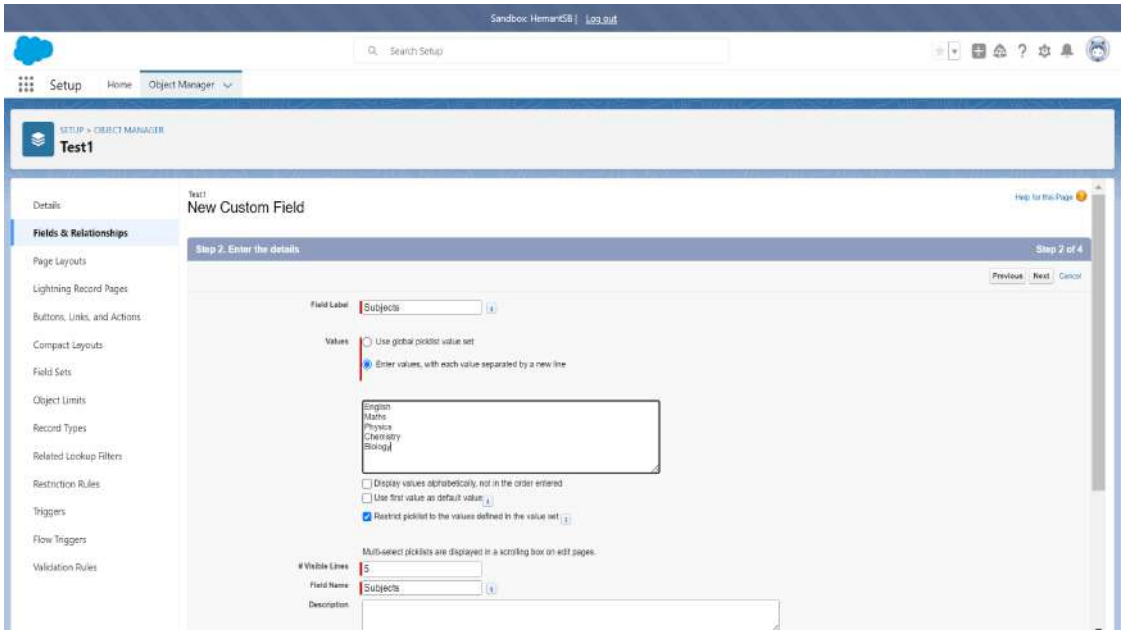
2. In object Manager Go to Field & Relationship

3. Click on **New**

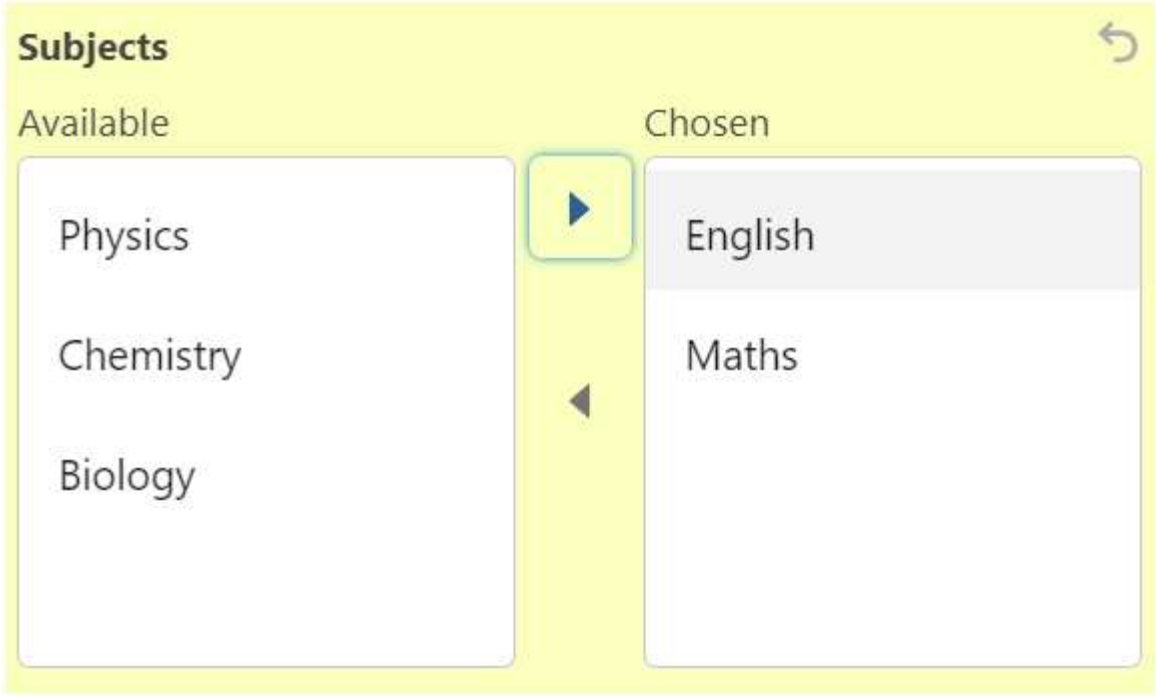
4. Choose The Data Type Picklist (Multiselect) and click on Next



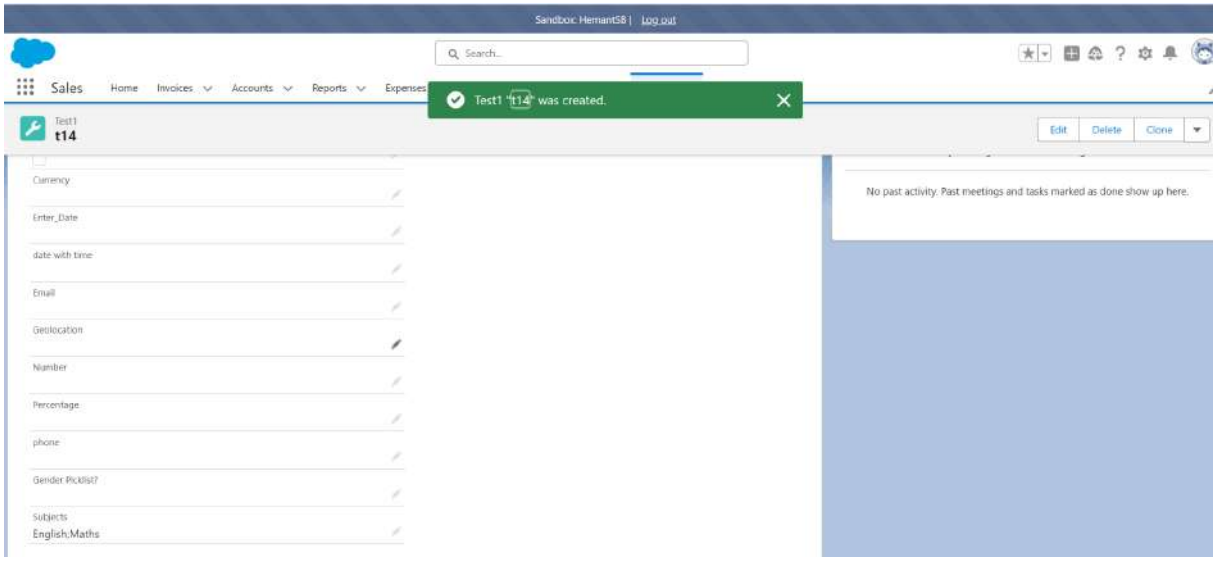
5. Enter Field label and Field Name and Enter visible lines and enter values whatever you want to add and Click On **Next , Next and Save.**



6. It will look like This in Records :

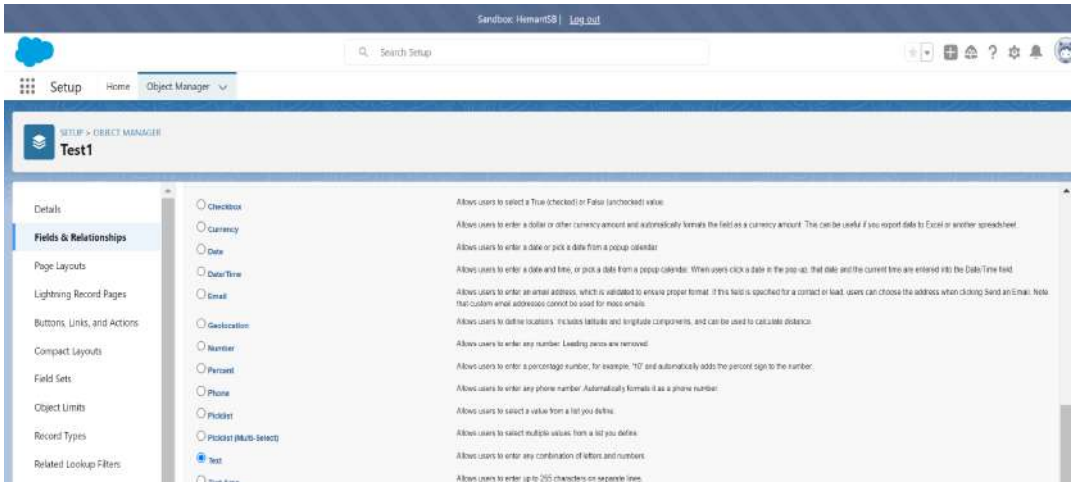


7. And After That it will final look like this :

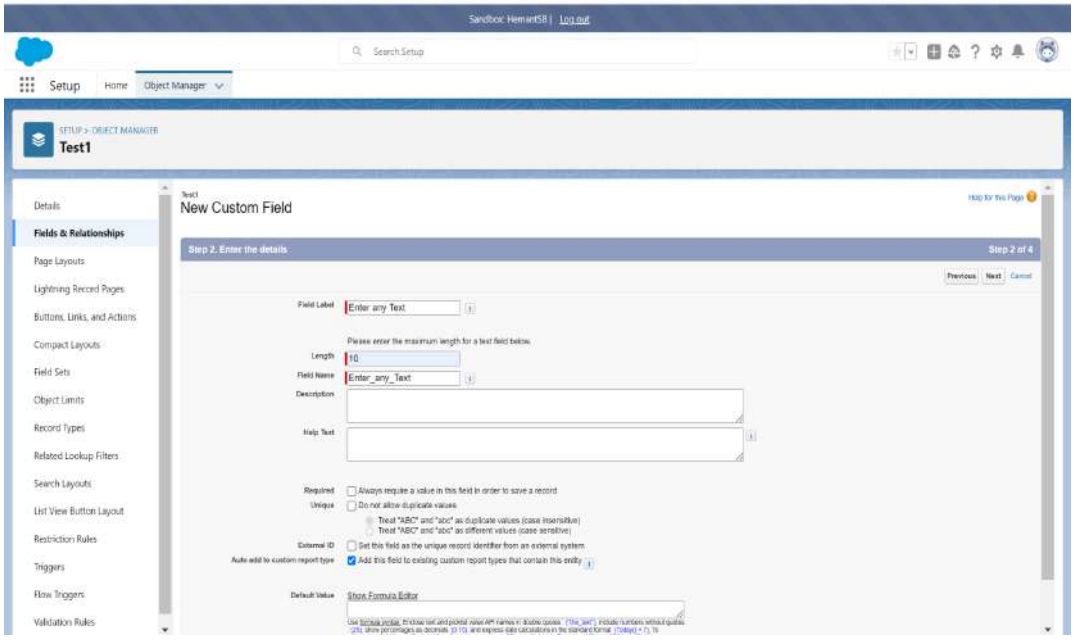


Text : Allows users to enter any combination of letters and numbers.

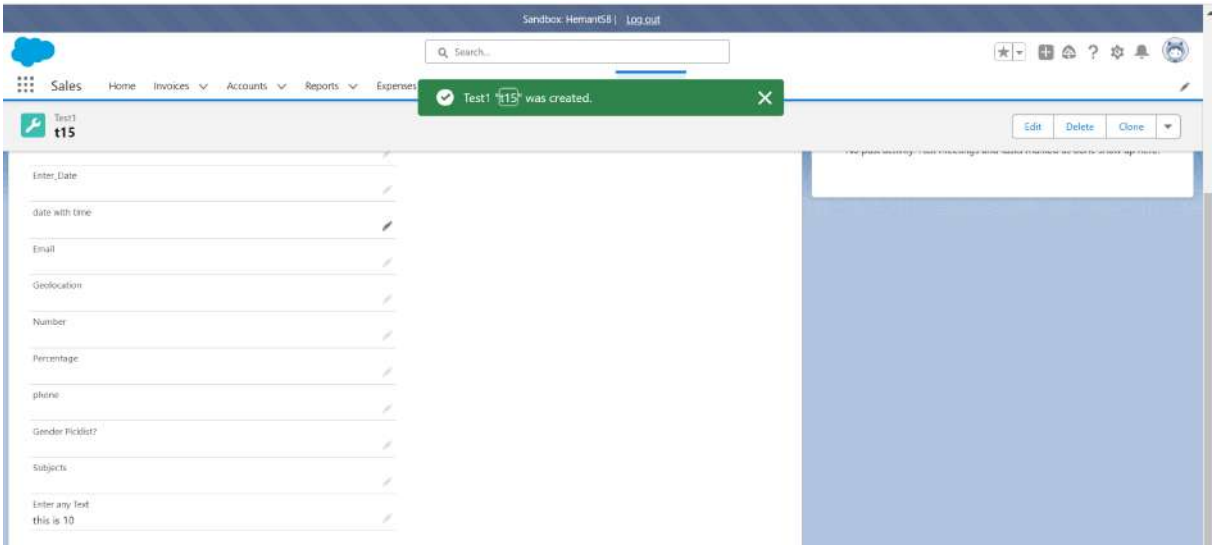
1. Click the **Object Manager tab**
2. In object Manager Go to Field & Relationship
3. Click on **New**
4. Choose The Data type **Text** and click on **Next**



5. Enter **Field label** and **Field Name** and **Enter Length** Click On **Next , Next and Save**.

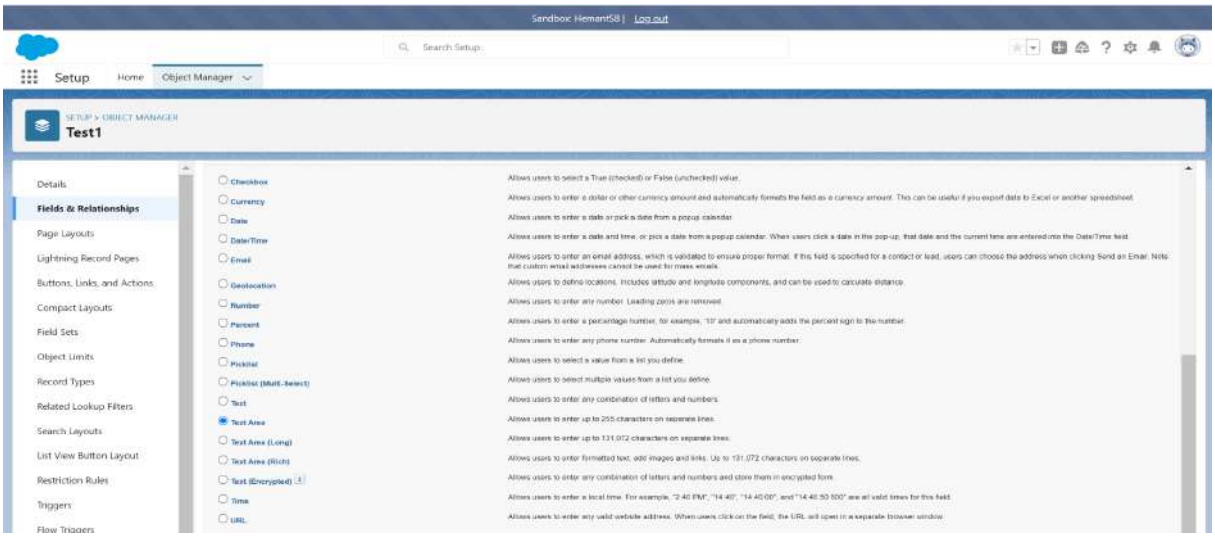


6. It will look like This in Records : **Enter Text**

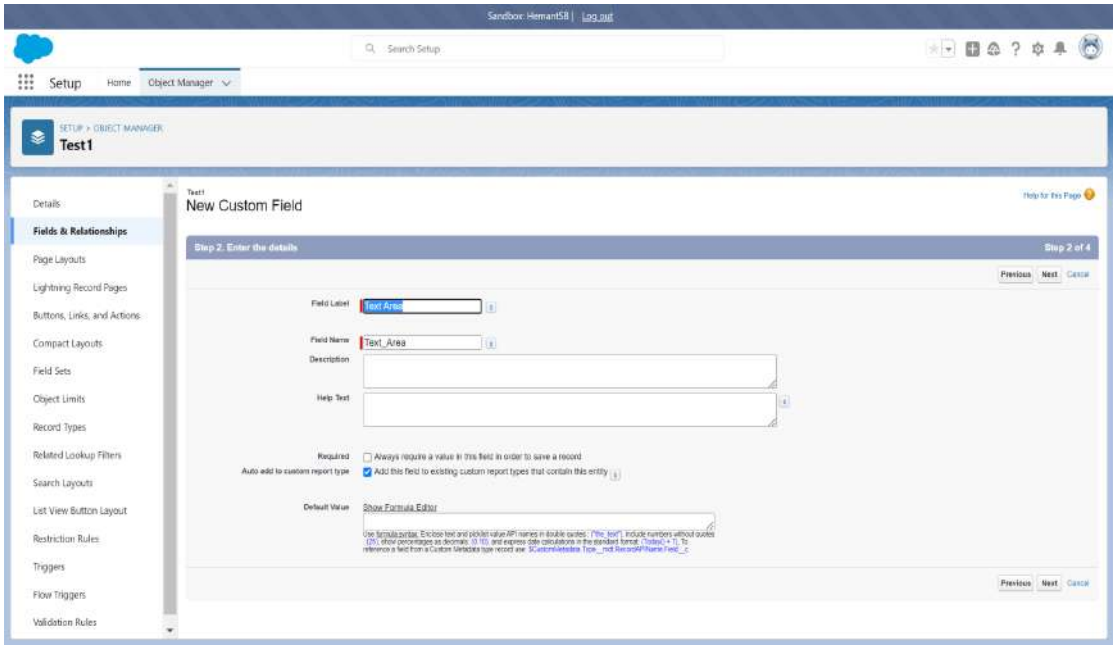


Text Area : Allows users to enter up to 255 characters on separate lines.

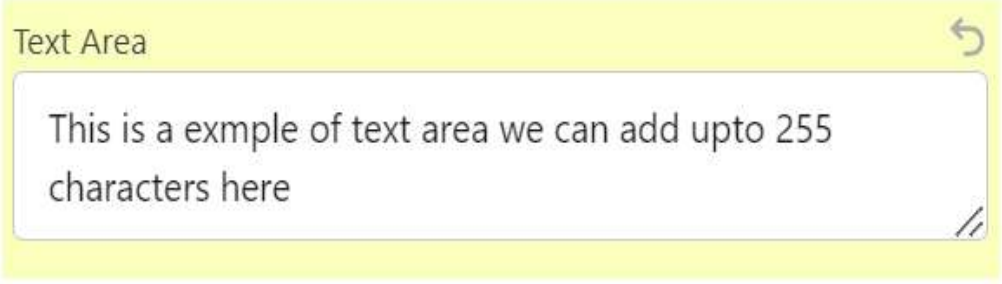
1. Click the **Object Manager tab**
2. In object Manager Go to Field & Relationship
3. Click on **New**
4. Choose The Data type **Text Area** and click on **Next**

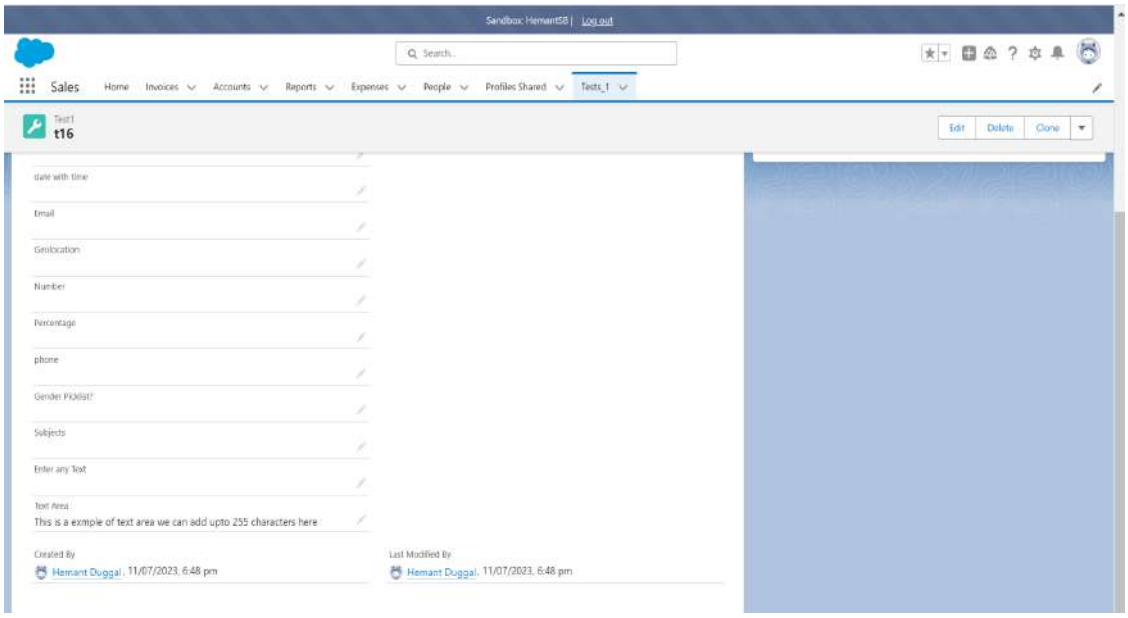


5. Enter **Field label and Field Name** and Click On **Next , Next and Save.**



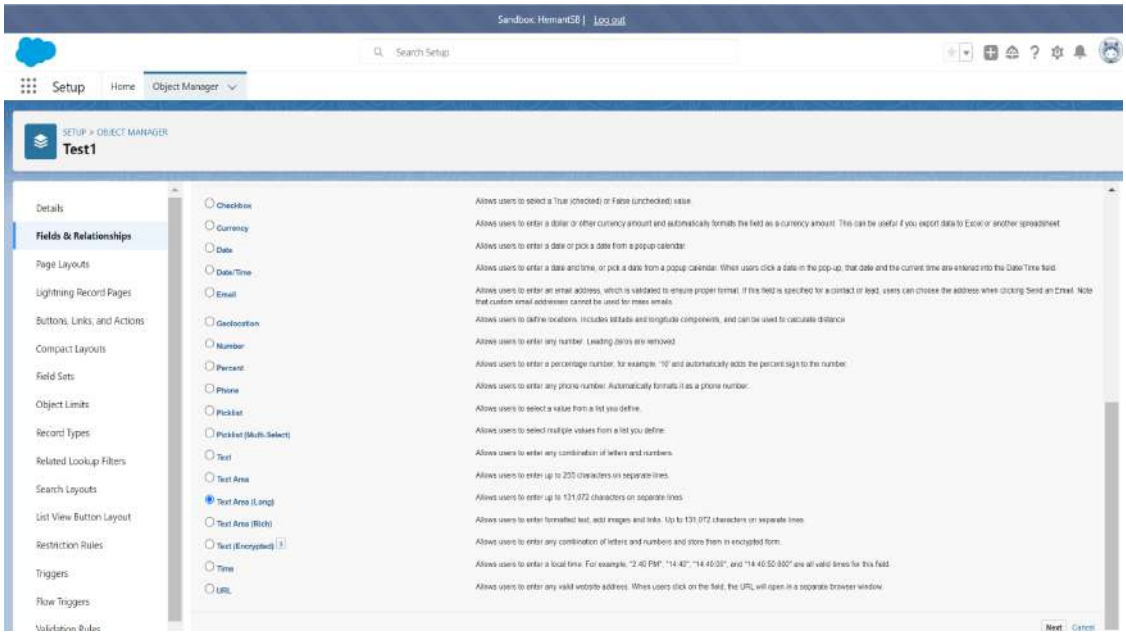
6. It will look like This in Records :



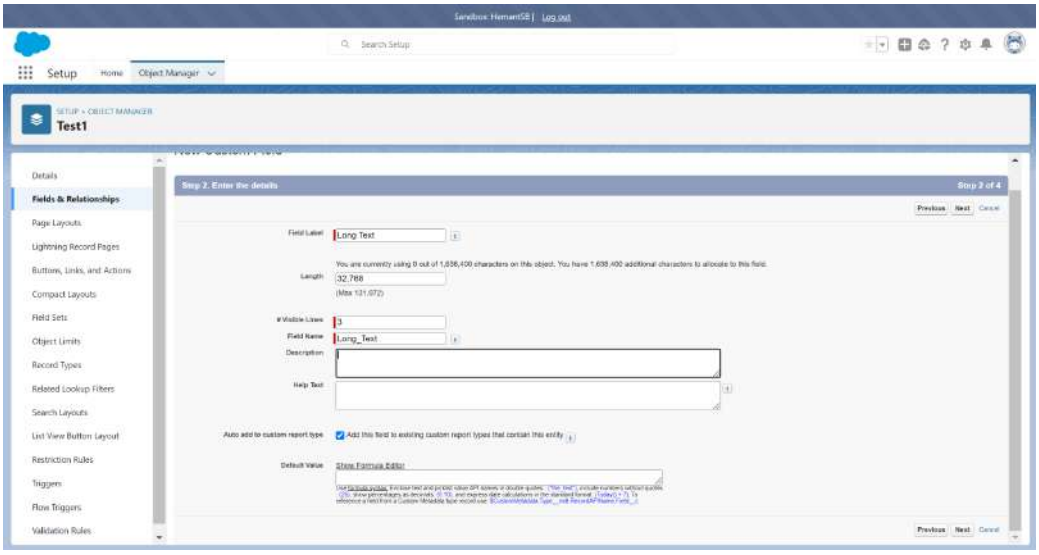


Text Area Long : Allows users to enter up to 131,072 characters on separate lines

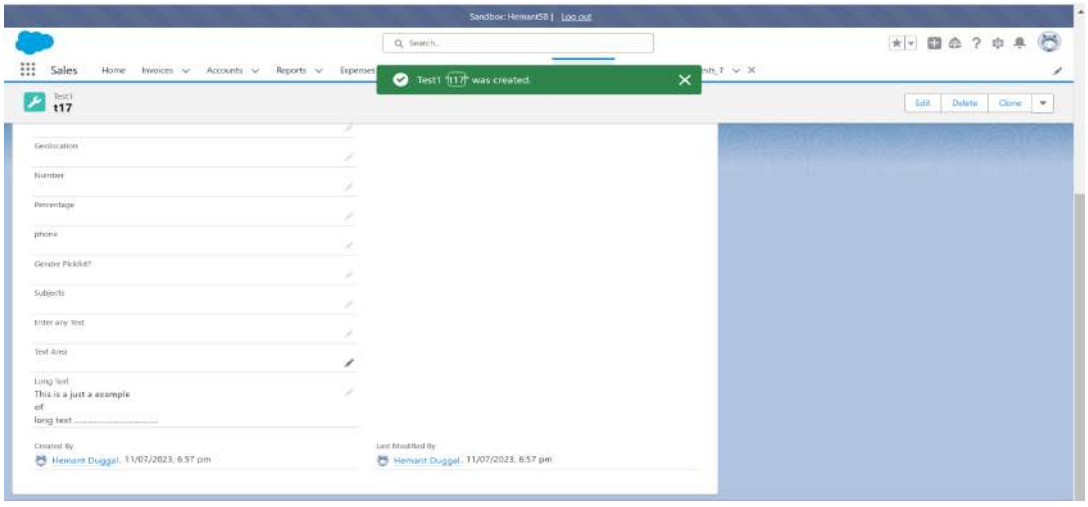
1. Click the **Object Manager tab**
2. In object Manager Go to Field & Relationship
3. Click on **New**
4. Choose The Data type **Text Area Long** and click on **Next**



5. Enter **Field label and Field Name** and Enter Length For **Example : 32,768** and also add **Visible lines** for **Example : 3** Click On **Next , Next and Save**.



6. It will look like This in Records :



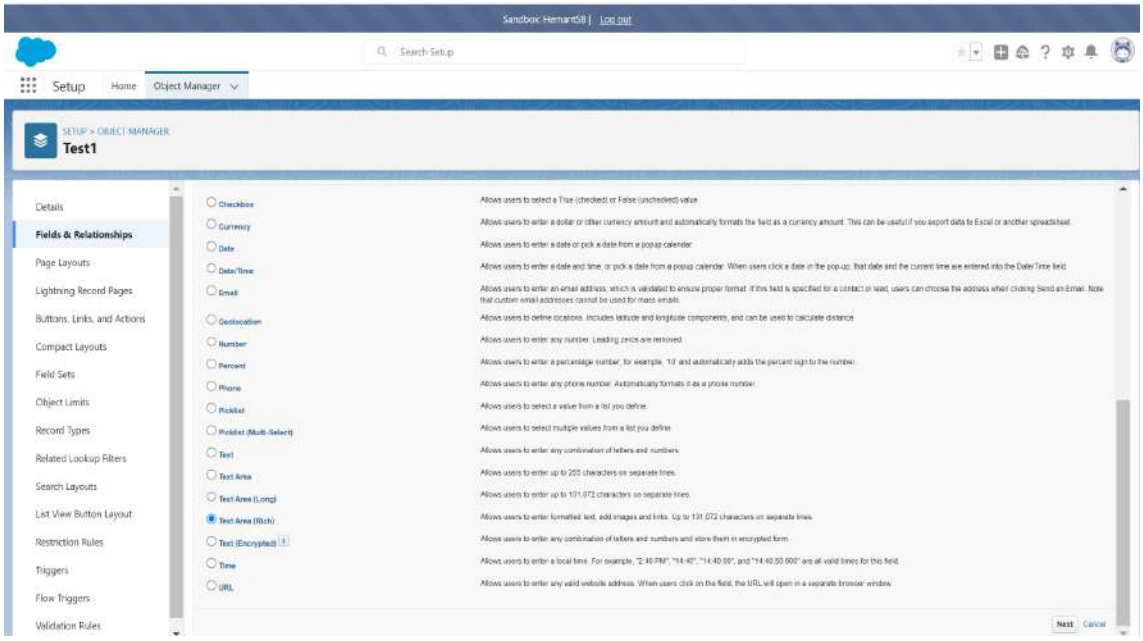
Text Area Rich : Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

1. Click the **Object Manager tab**

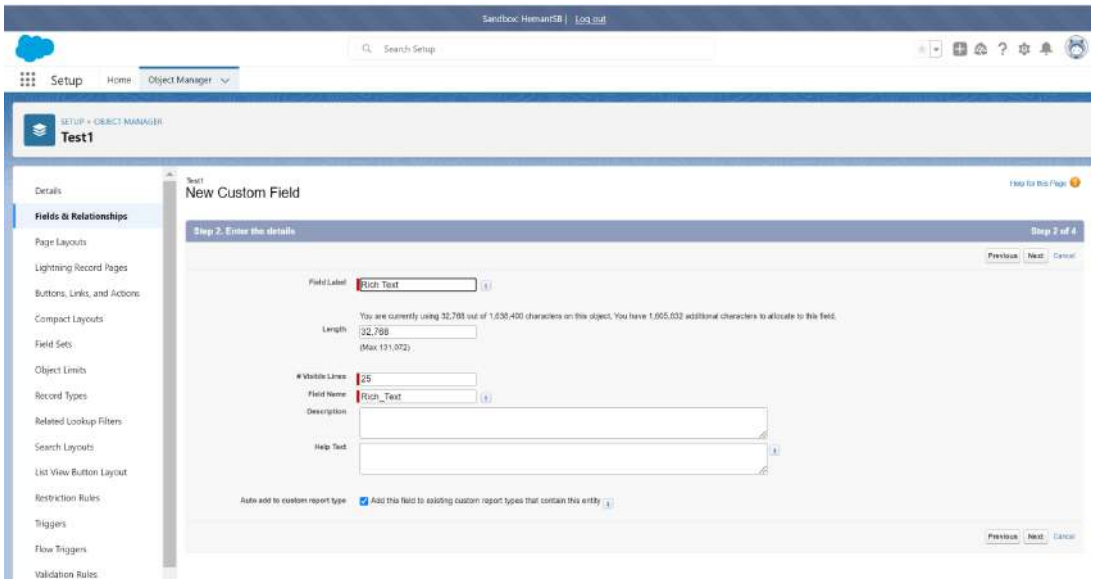
2. In object Manager Go to Field & Relationship

3. Click on **New**

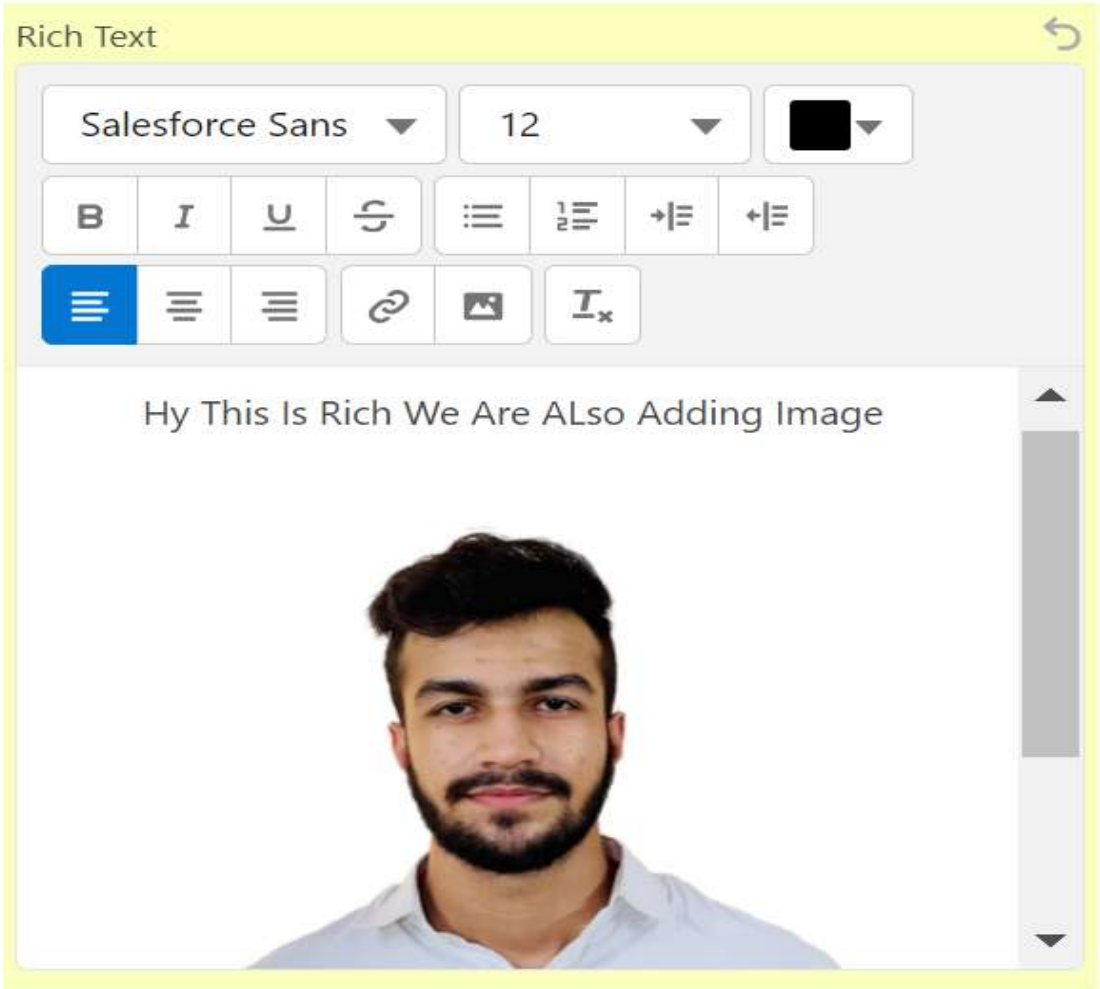
4. Choose The Data type **Text Area Rich** and click on **Next**

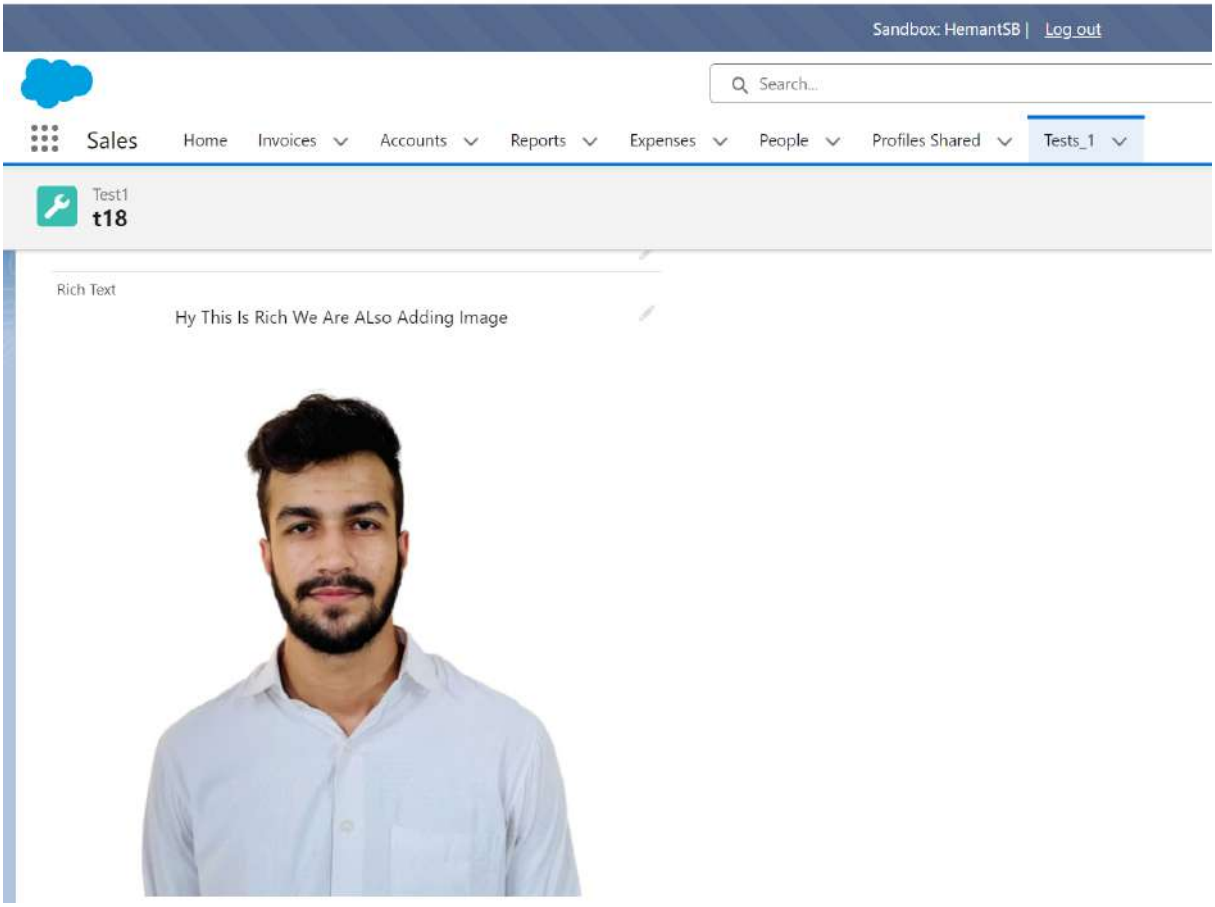


5. Enter **Field label and Field Name** and Enter Length For **Example : 32,768** and also add **Visible lines** for **Example : 25 ,** It must be greater than 10 else it will give an error Click On **Next , Next and Save**.



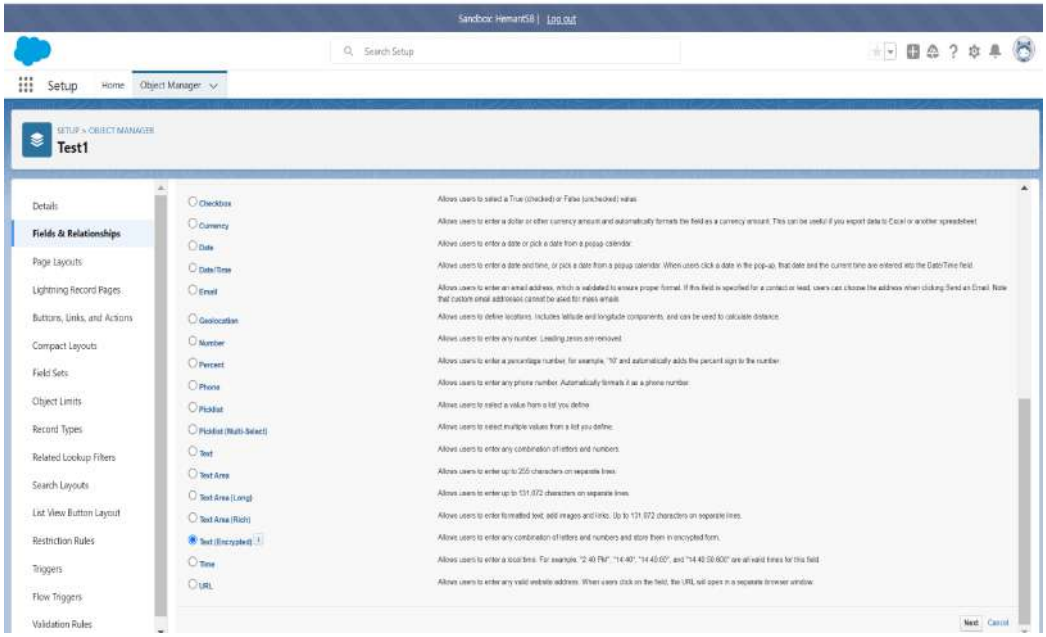
6. It will look like This in Records :

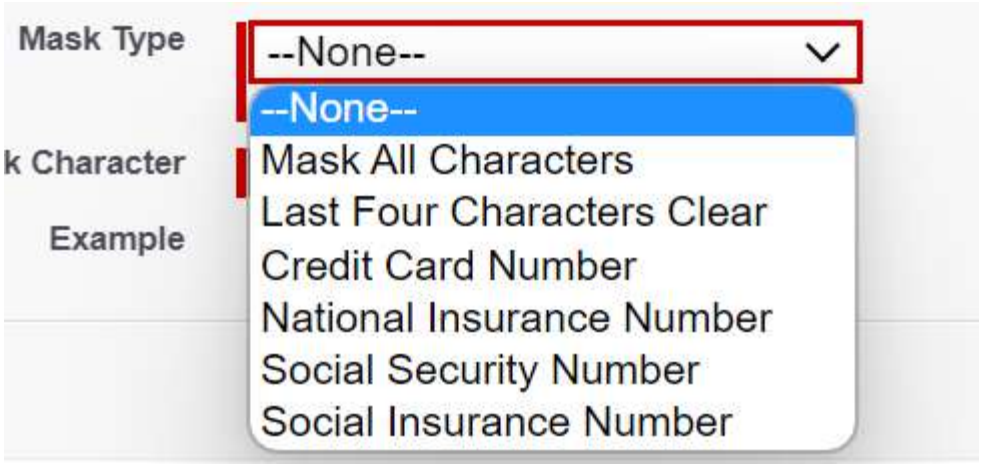




Text Encrypted : Allows users to enter any combination of letters and numbers and store them in encrypted form

1. Click the **Object Manager tab**
2. In object Manager Go to Field & Relationship
3. Click on **New**
4. Choose The Data type **Text Encrypted** and click on **Next**

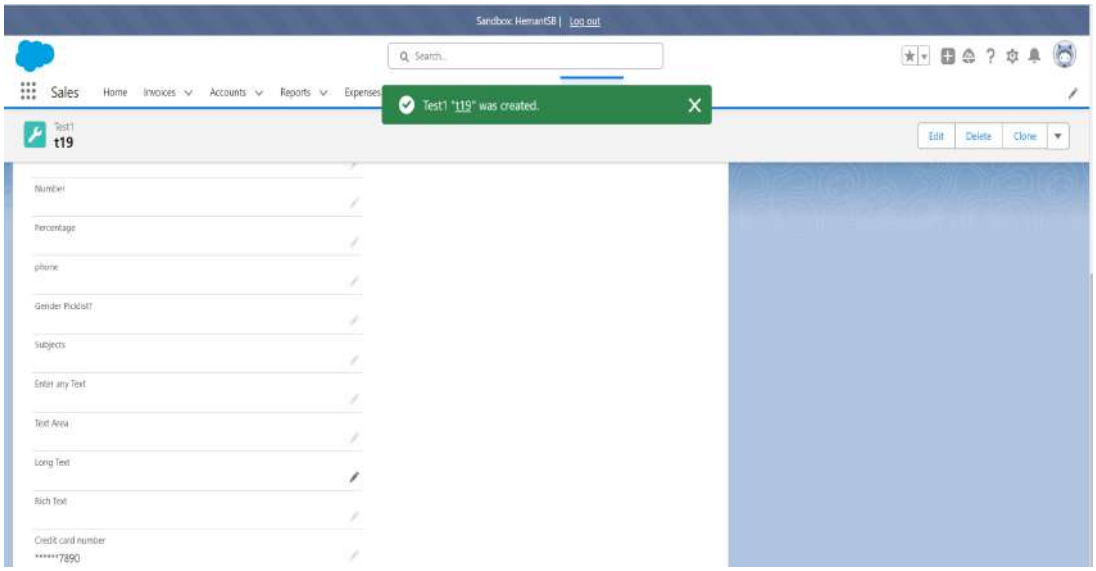


5. Enter Field label and Field Name
6. Enter Length Add **Mask type**
7. 

8. After That Add A Mask character on it : For **Example :**

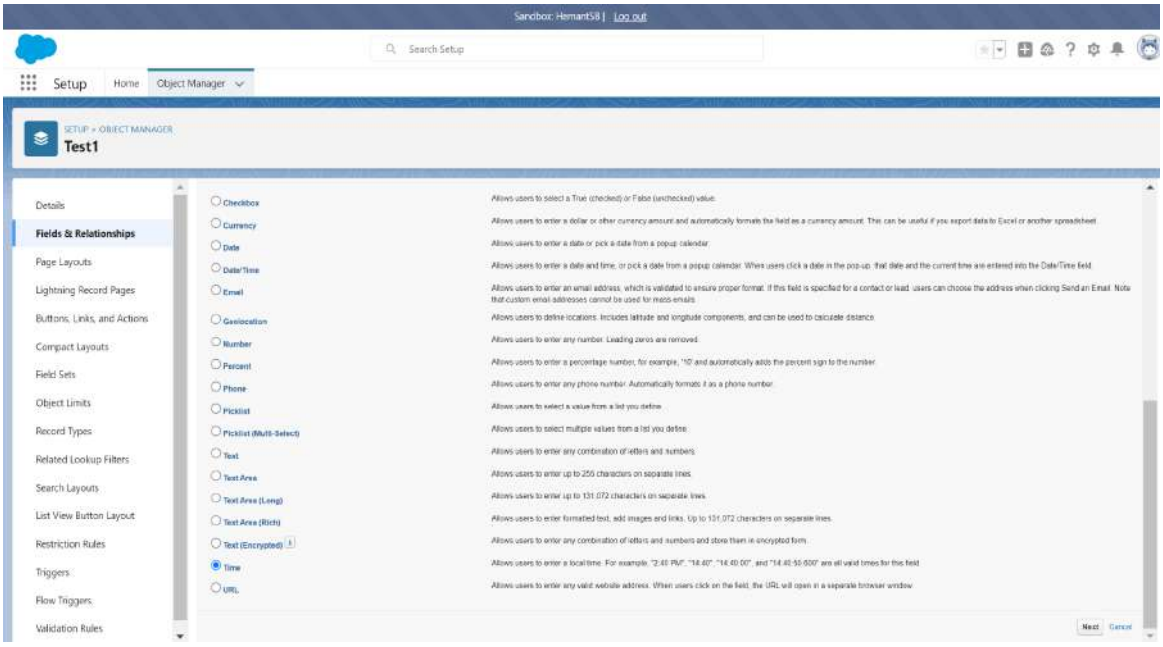
9. Click On **Next , Next and Save.**

10. It will look like This in Records :

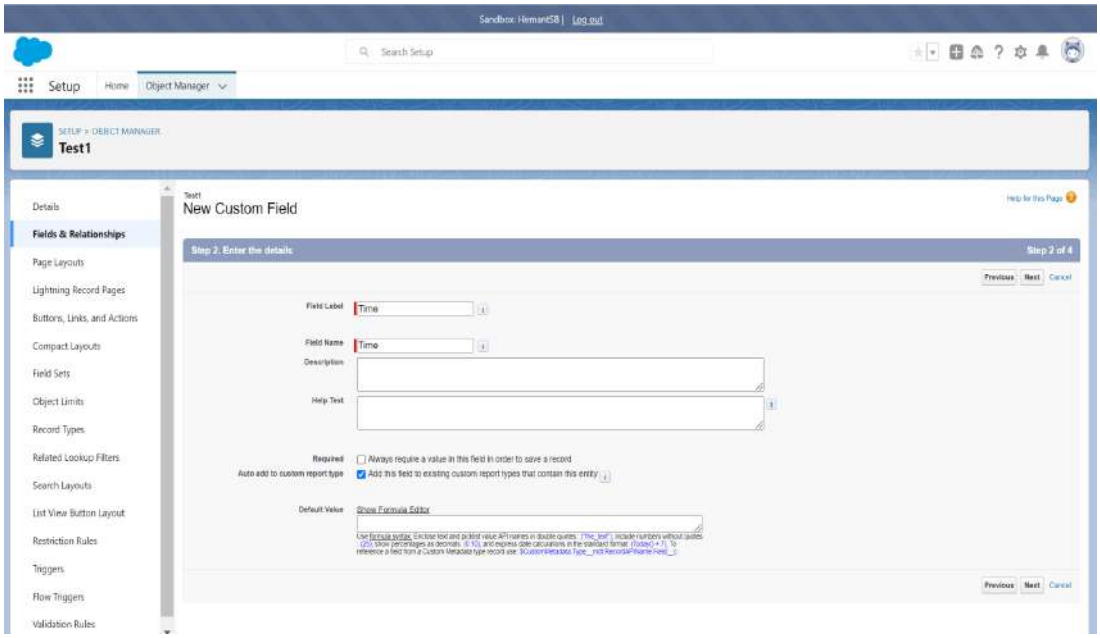


Time : Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.

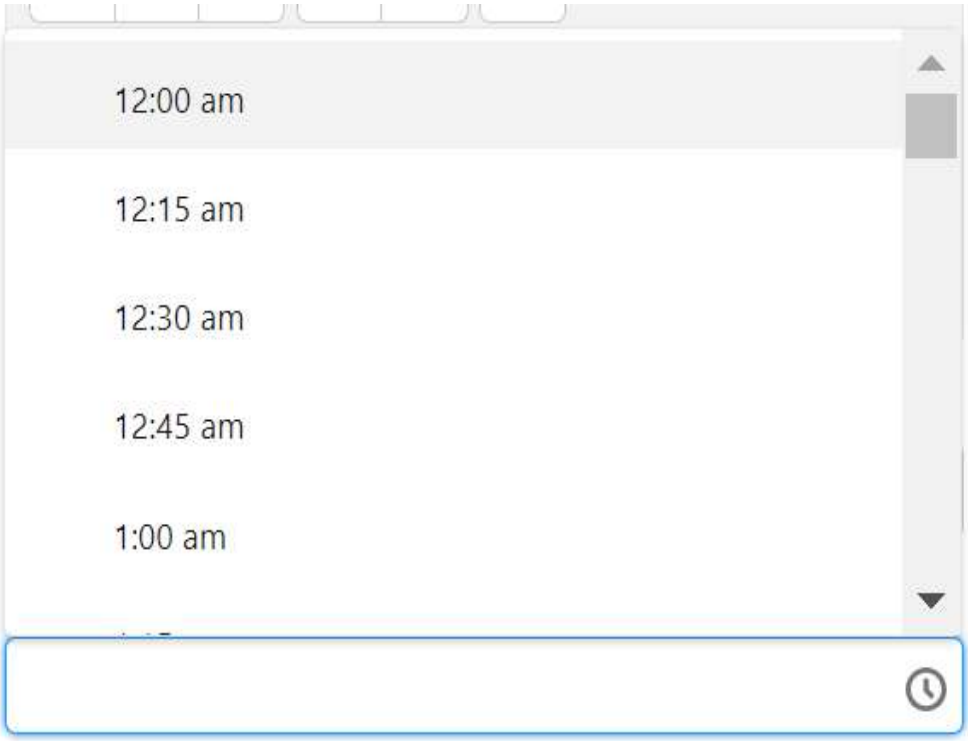
1. Click the **Object Manager tab**
2. In object Manager Go to Field & Relationship
3. Click on **New**
4. Choose The Data type **Time** and click on **Next**

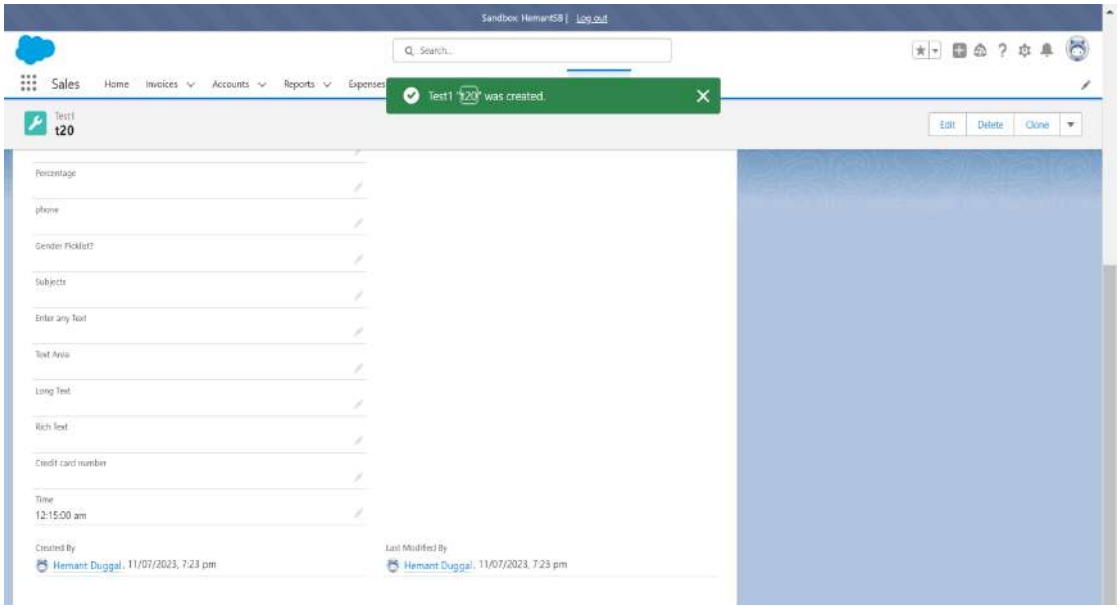


5. Enter Field label and Field Name and Click On **Next , Next and Save.**

6. 

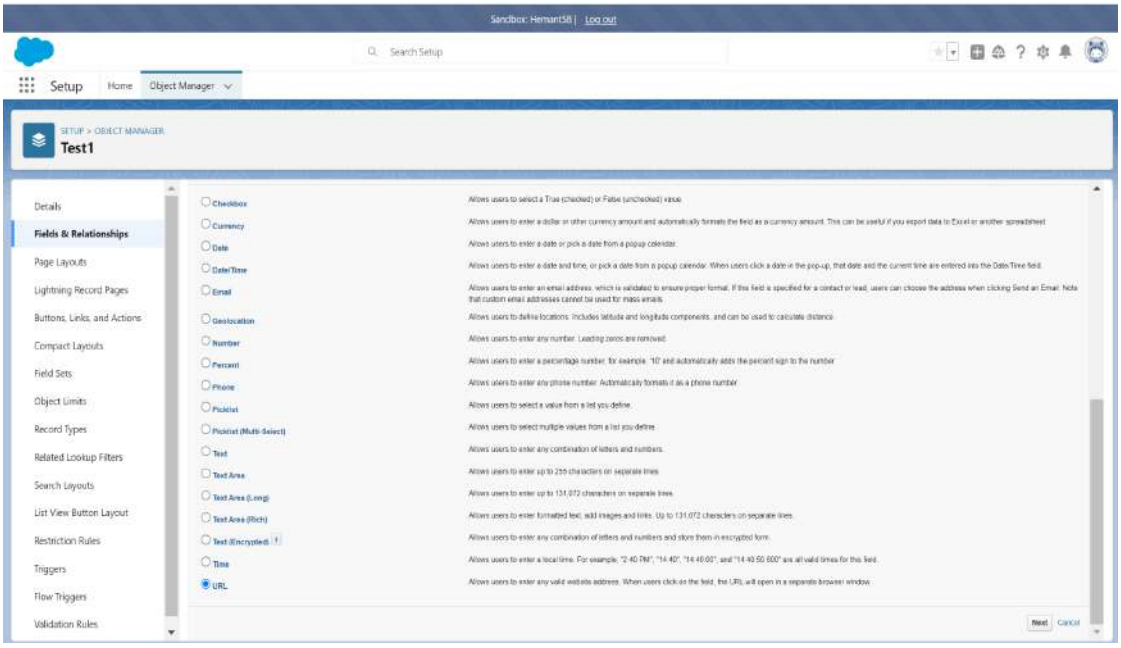
7. It will look like This in Records :



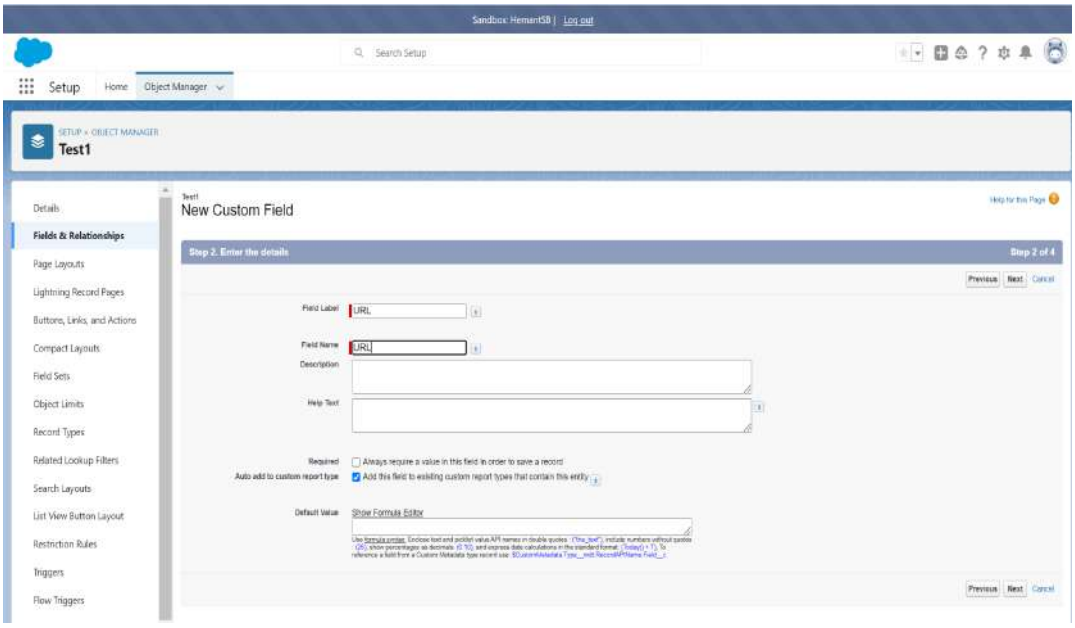


URL : Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

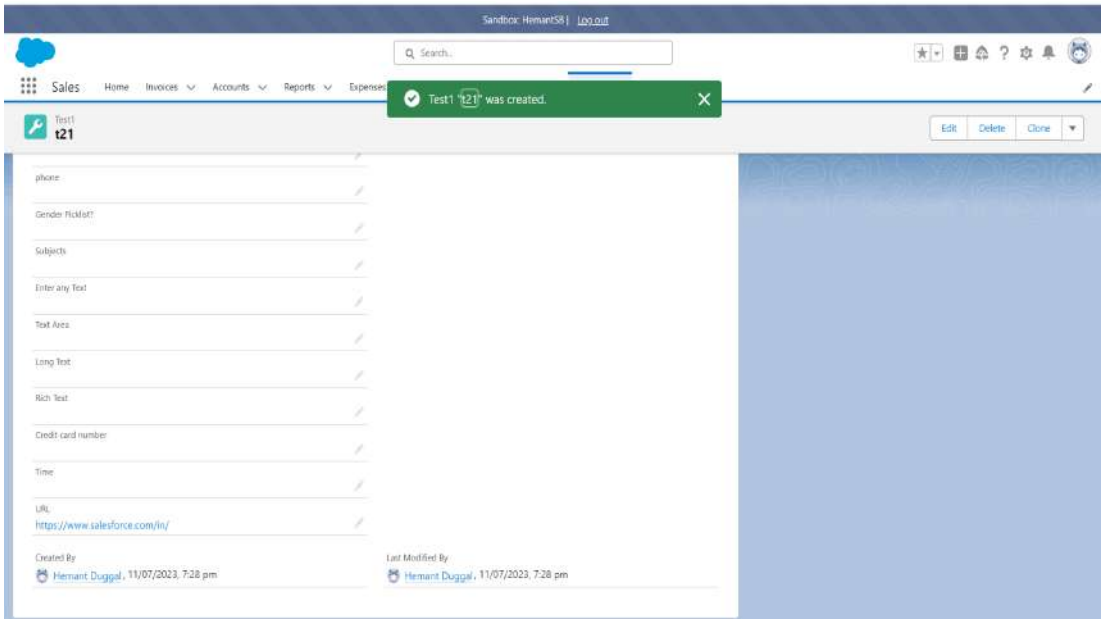
1. Click the **Object Manager tab**
2. In object Manager Go to Field & Relationship
3. Click on **New**
4. Choose The Data type **Url** and click on **Next**



5. Enter Field label and Field Name and **Click On Next , Next and Save**.



6. It will look like This in Records :



Relationship: A relationship is a bi-directional association between two objects. Relationships allow us to create links between one object and another.Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

Relationship is generally of six types:-

1. Self-relationship
2. Master-detail relationship
3. Lookup relationship
4. External lookup relationship
5. Many-to-many relationship (junction object)
6. Hierarchical relationship

➢ **Self Relationship:-**

Self-relationship simply means creating a relationship with itself. In this, we can relate an object with itself by look-up.
Example: Account object has a field called Parent Account which shows the self-relationship in Account.We can have a maximum of 25 self lookups .

➔ **Many-to-Many relationships:-**

In many-to-many relationships, records of particular objects are linked to multiple records of different objects and vice versa. There is no such field as a many-to-many relationship in Salesforce, we can create a many-to-many relationship by creating two master-detail relationships with a common object. This common object can also be specified as the junction object.

➢ **External relationship:-**

This is a new field type that has been introduced with *Salesforce Connect*. To link an external object to another external object, we use the external relationship field. It supports standard look-up relationships that use 18 characters Salesforce Id for the association.

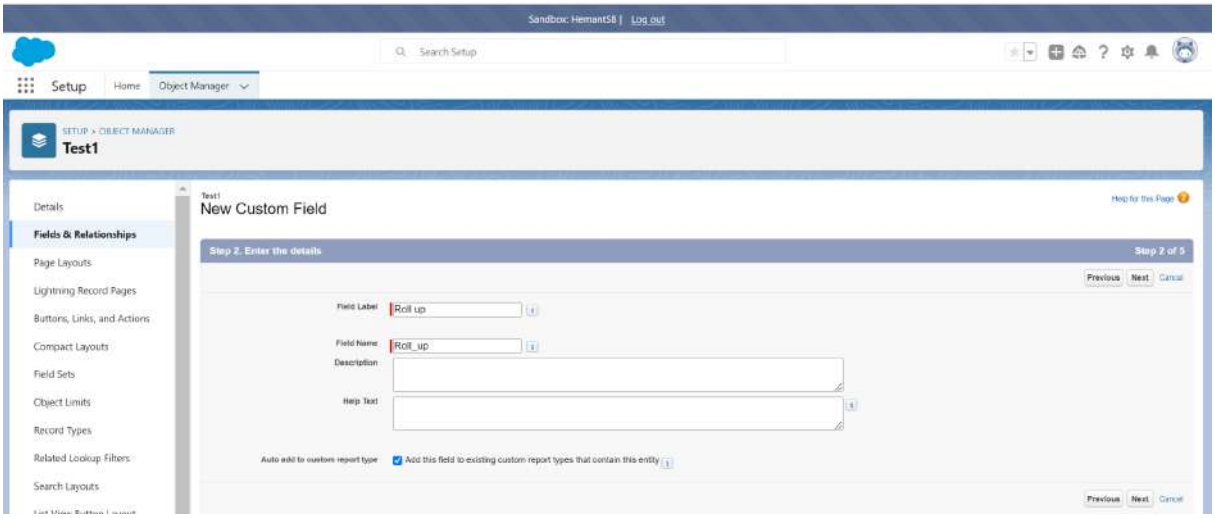
How to enable Roll up summary in Fields?

- Create a new custom object first and after that make a new field in **Master Detail Relationship**
- Click on **Next**
- Choose **Related to** : Previous object in which you want to create
- Click **Next**
- Enter **Field Name** and **Field Label** and **Child Relationship Name** Click On **Next,Next and Save**

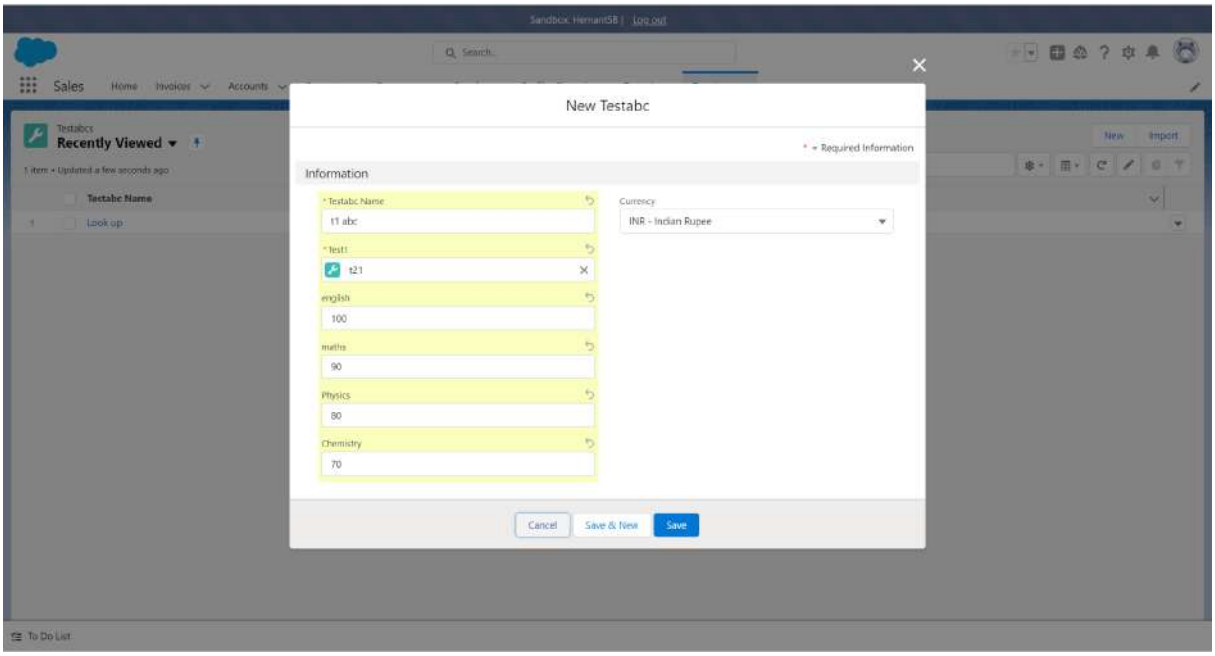
Roll Up Summary : A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Roll-up summary:-

- ➔ Roll-Up Summary fields are used to summarize data with any associated child object.
- ➔ Roll-Up Summary field can only be created for Master-detail Relationship.
- ➔ Roll-Up Summary field can not be created for Lookup Relationship.
- ➔ It Derives the data from child Objects.
- ➔ We can't change the field type of a field that we reference in a roll-up summary field.
- ➔ Auto numbers are not available here.
- ➔ Roll-Up Summary fields are not available for mapping lead fields of converted fields.
- ➔ We can have a maximum of 25 rollup summary fields per master object.
- ➔ Functions used in roll up summary.
    - Count : It calculates the total number of related records.
    - Sum : It totals the values of selected fields.
    - Min : Displays lowest value
    - Max : Displays the highest value.



Then First Create Fields in Child object of any type and then create a formula field in object as an example to create : let suppose **Total SUm and input a values**



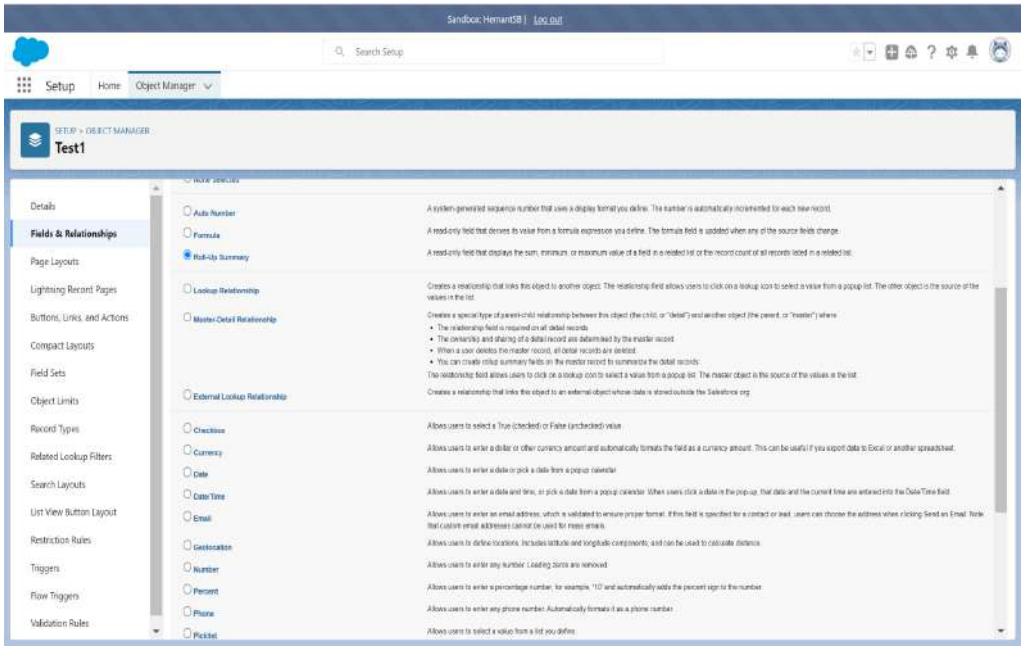
And after that Go to previous object i.e **Parent object** and make a **Roll-up-summary** field in that as:

1. Click the Object Manager tab

2. In object Manager Go to Field & Relationship

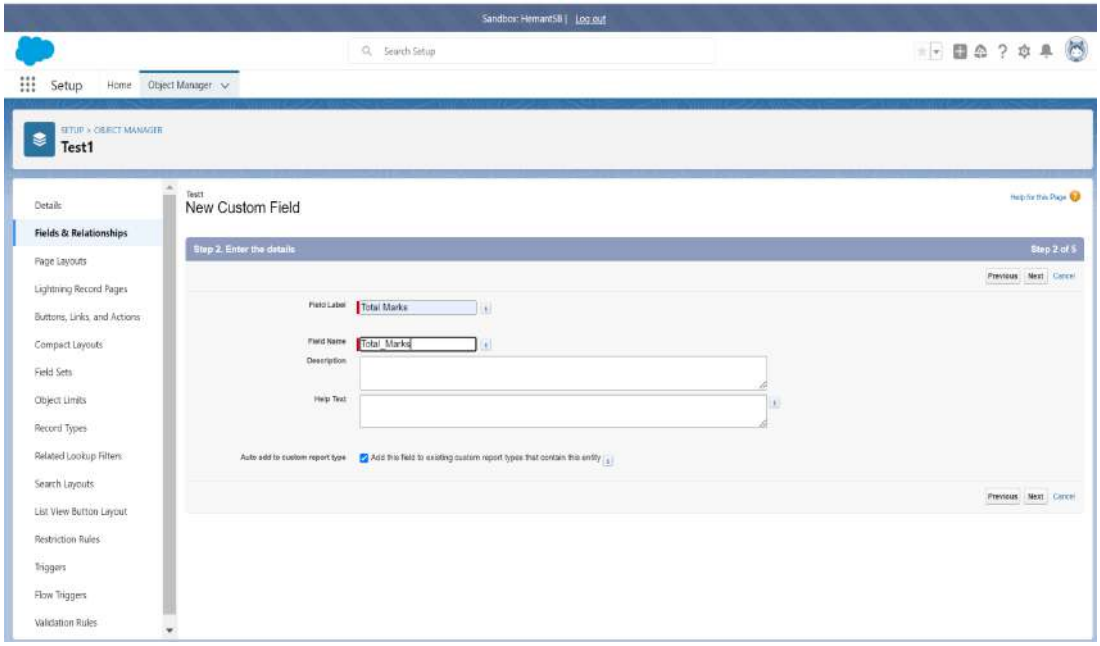
3. Click on New

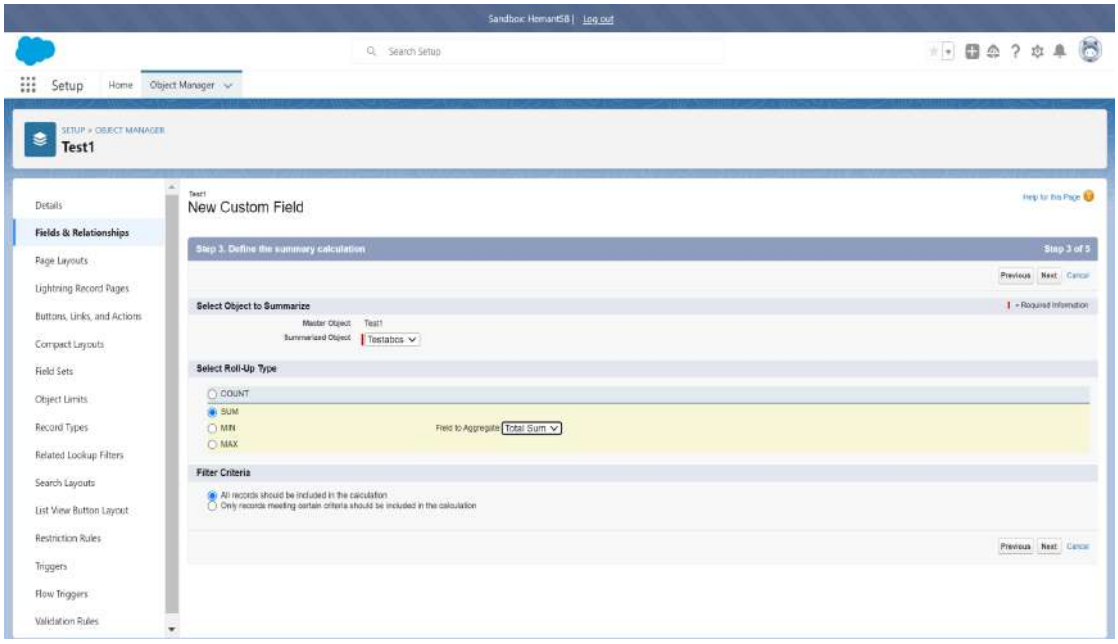
4. Choose The Data type **Roll-up-summary** and click on Next



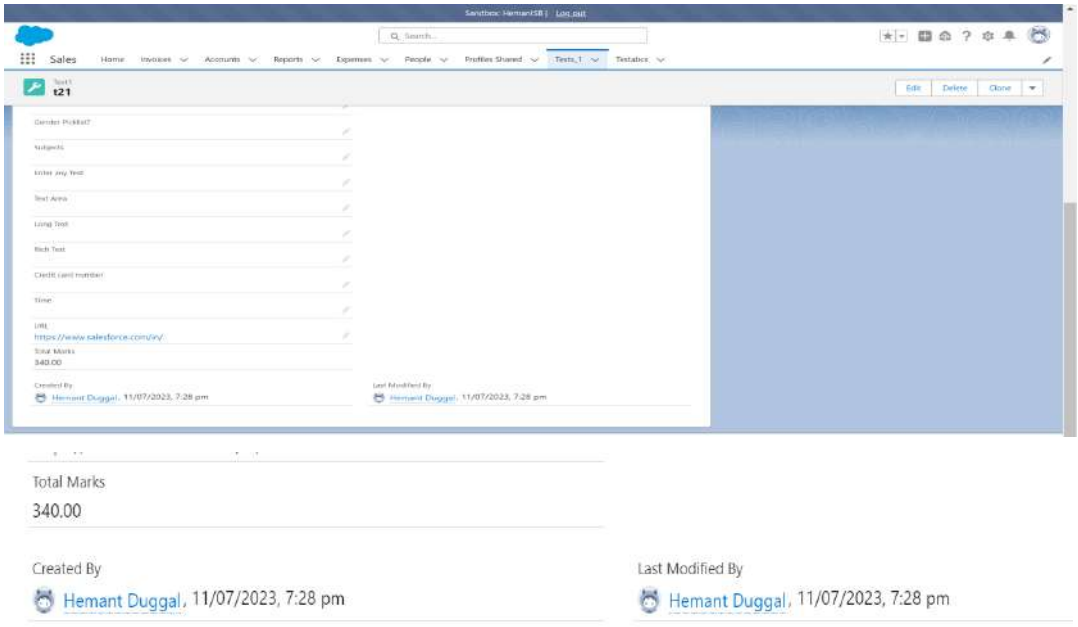
5. Enter Field label and Field Name and Click On **Next , and Summarize objects with object Next and select roll up type** and field aggregate to that

field in another object **and Save**.





6. It will look like This in Records :

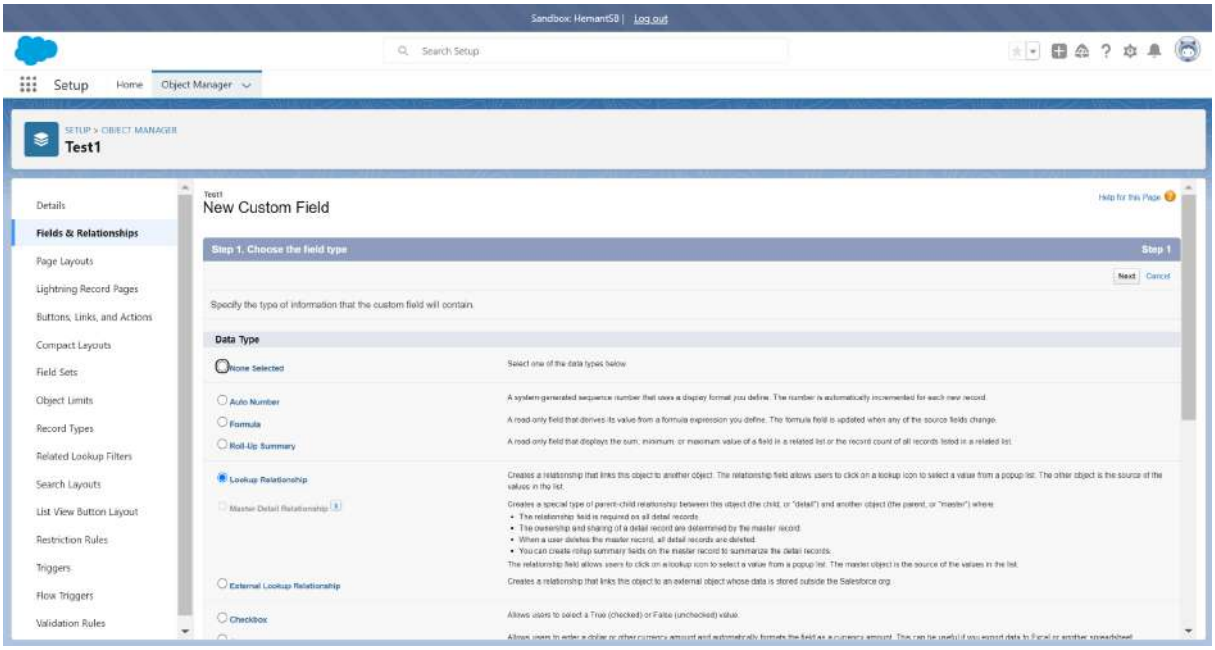


LOOK Up Relationship : Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

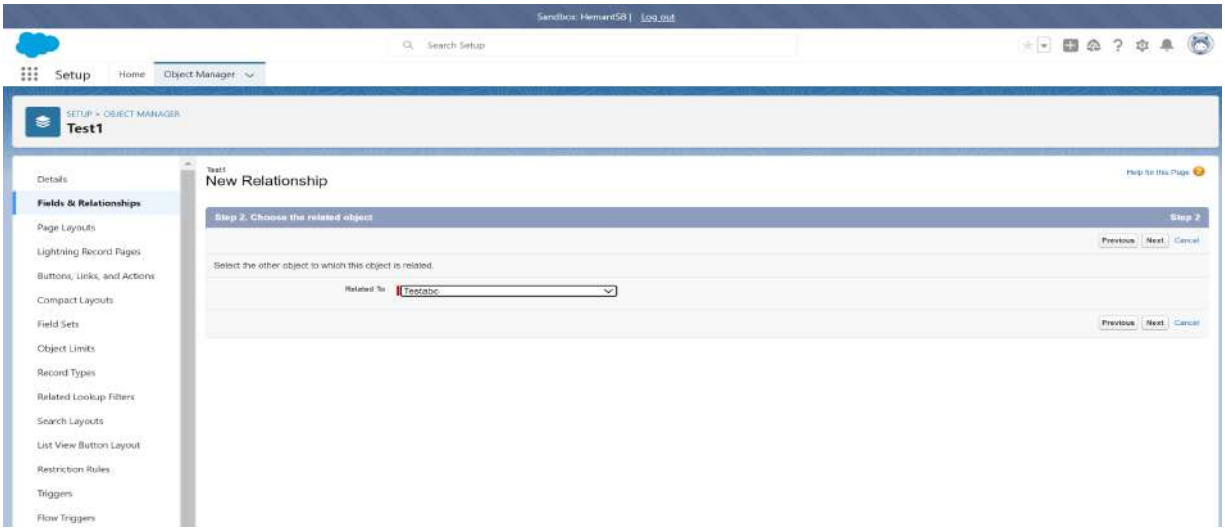
➔ Lookup relationship:-

- In this, objects are loosely coupled.
- When a parent's record gets deleted, the child remains in existence.
- We cannot create a roll-up summary field in a lookup relationship.
- Parent and child records have their own sharing and security settings in look-up relationships.
- The Lookup relationship field is not mandatory by default but we can select a checkbox to make it mandatory in lightning.
- We can have a maximum of 40 lookup per object.
- To convert a master-detail to look-up we have to check that there is no roll-up summary field available and can convert a look-up to master-detail if the lookup field in all records contains a value.

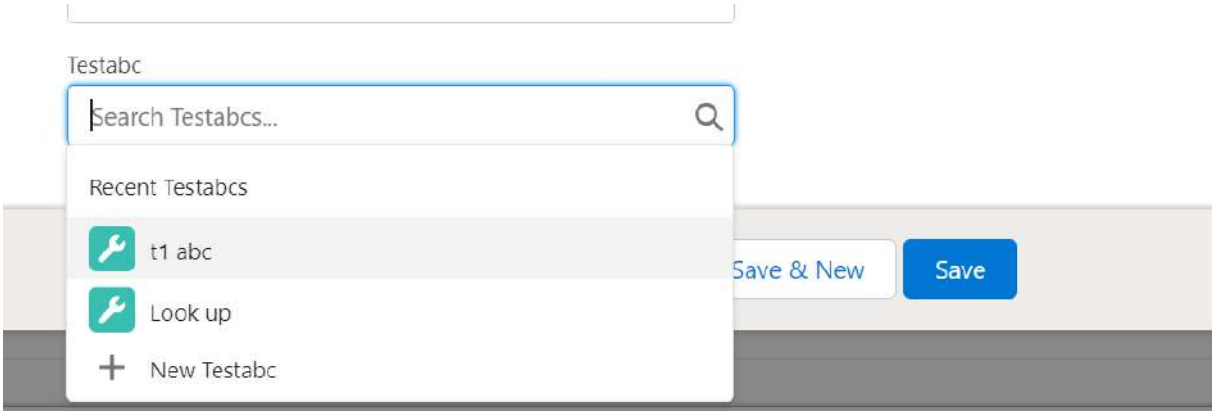
1. Click the **Object Manager tab**
2. In object Manager Go to Field & Relationship
3. Click on New
4. Choose The Data type **Look Up** and click on **Next**

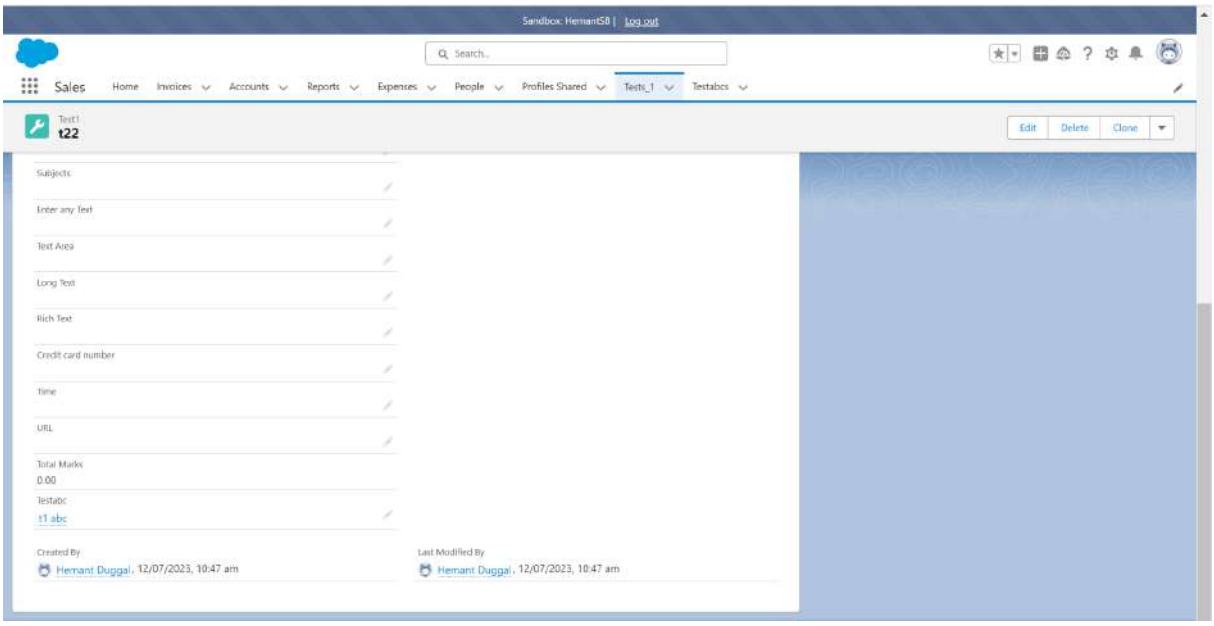


5. Enter Field label and Field Name and **Relate to** Click On Next , Next and Save.



6. It will look like This in Records :





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 detailed 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.

Master-detail relationship:-

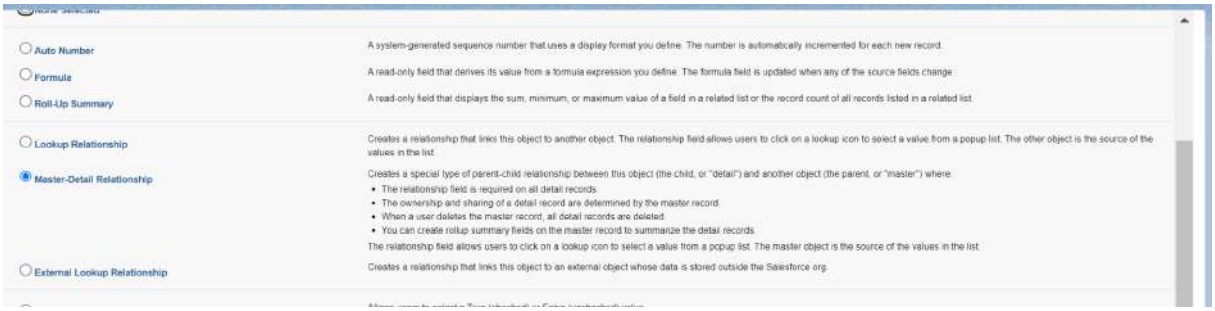
- ➔ This relationship acts as a parent-child relationship. We use this type of relationship when we want to bound two objects closely dependent on each other.
- ➔ Master detail relationship field is mandatory to be filled.it cannot be empty.
- ➔ When a master record gets deleted, its related child/detail record automatically gets deleted.
- ➔ We can have a maximum of 2 master/detail relationships per object.
- ➔ The master object is the source of the values in the list.
- ➔ The parent record controls the behavior of the child record regarding visibility and sharing.It means the security setting of a parent object applies to the child object.
- ➔ When there is a master-detail relationship between two objects, you can create a unique type of field over the master object, called Roll-up summary. A roll-up summary field allows us to calculate values from child records, such as the number of child records linked to a parent record.

1. Click the **Object Manager tab**

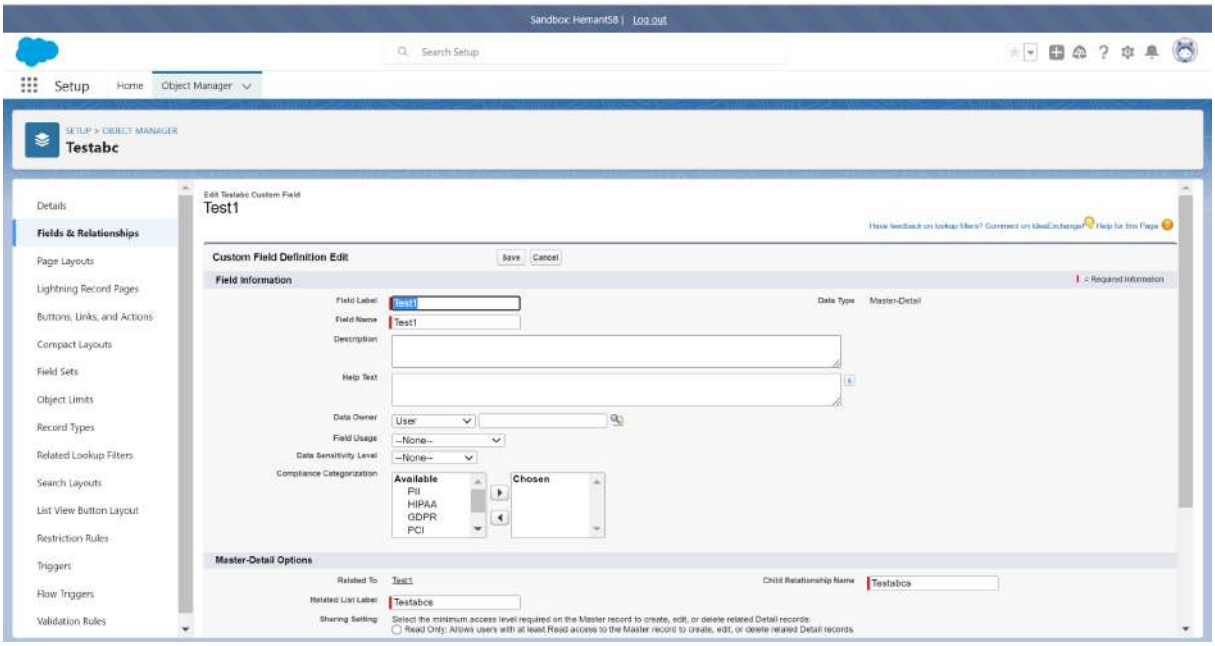
2. In object Manager Go to Field & Relationship

3. Click on **New**

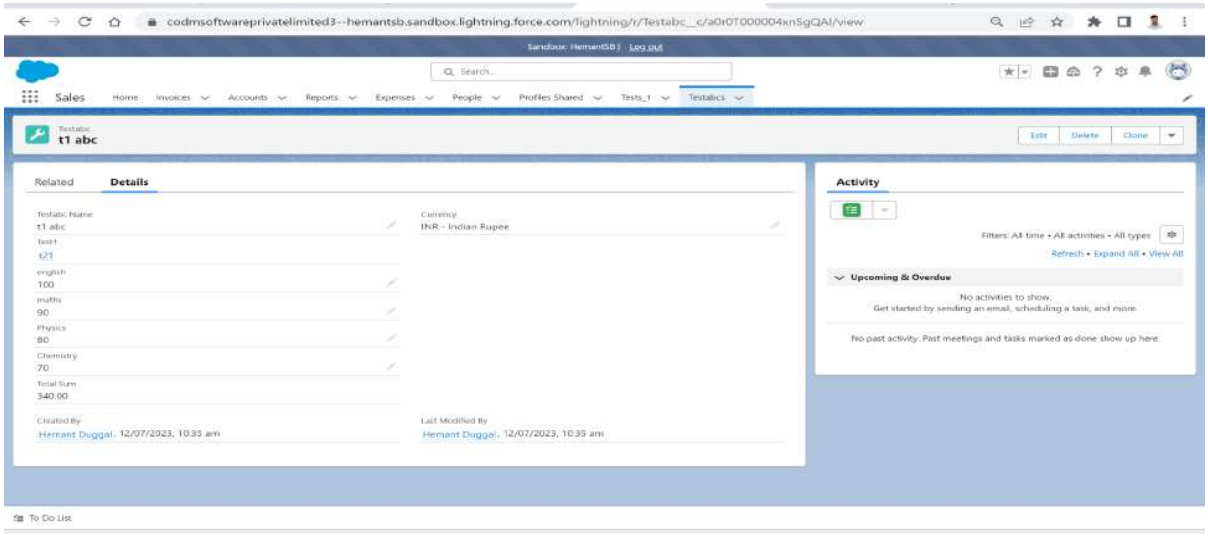
4. Choose The Data type **Master Detail** and click on **Next**



5. Enter Field label and Field Name and **Related** to and a Related list label and Click On **Next , Next and Save.**



6. It will look like This in Records :

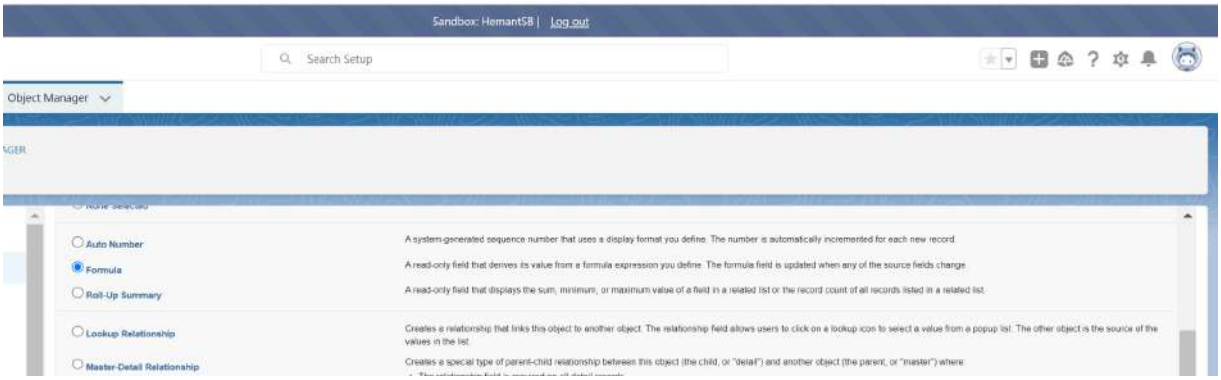


Formula : A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change**.**

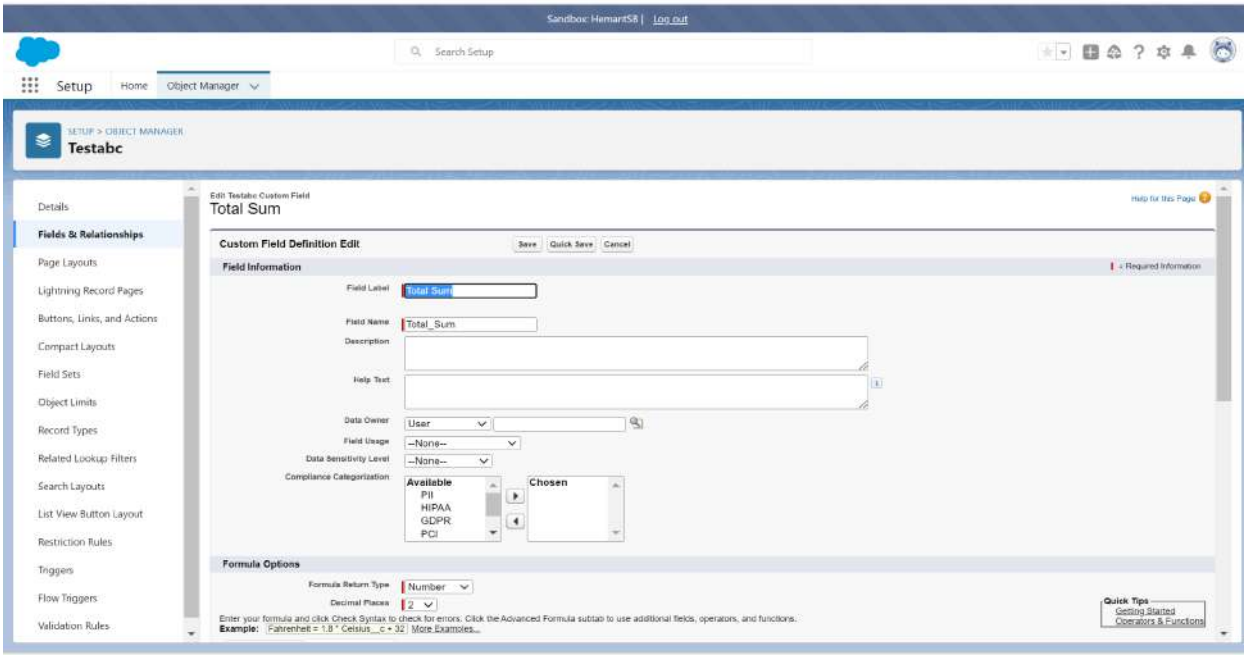
- This is the read only field whose value is derived from expression.
- It is used to display some calculated values.
- We cannot edit values of formula fields.
- It is automatically updated once the field involved in the formula changes its values.
- Values of formula fields depend on other fields.

Let us Understand With The Simplest Example :

1. Click the **Object Manager tab**
2. In object Manager Go to Field & Relationship
3. Click on **New**
4. Choose The Data type **Formula** and click on **Next**



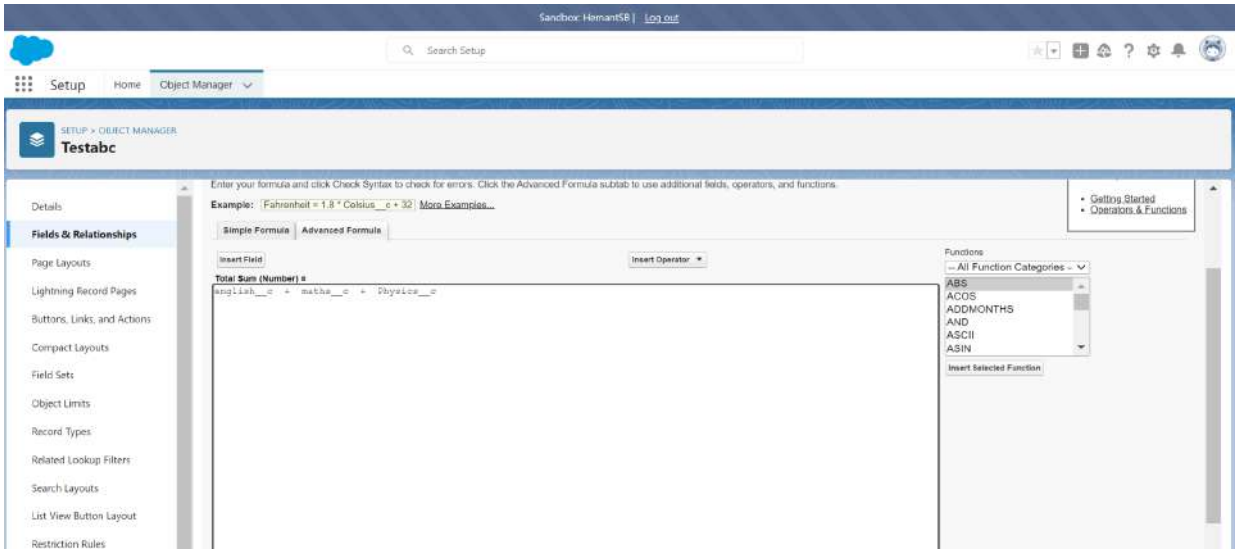
5. Enter **Field label and Field Name**



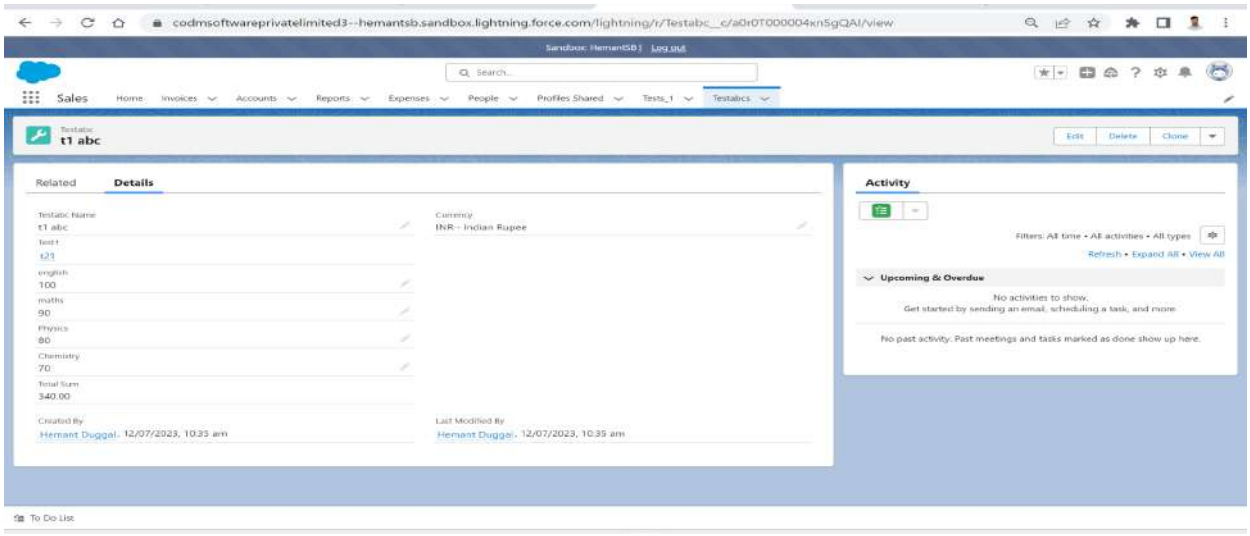
6. Select any Formula Return Type Suppose AS **Number**

7. Select **Formula Editor** And **insert Fields Operators And A Function** For That

8. Click On **Check Syntax** and Click On **Next , Next and Save.**

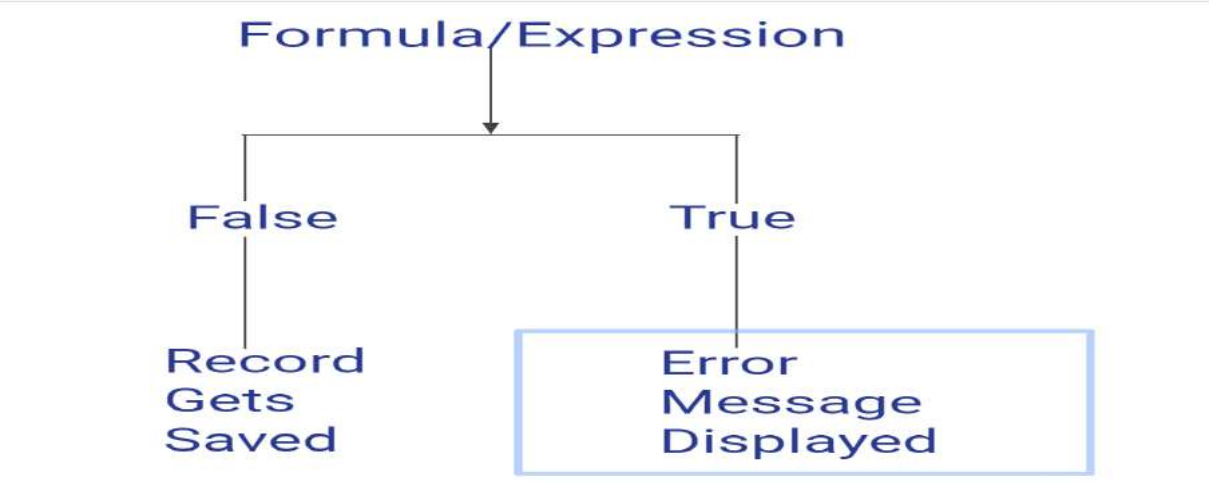


9. It will look like This in Records :



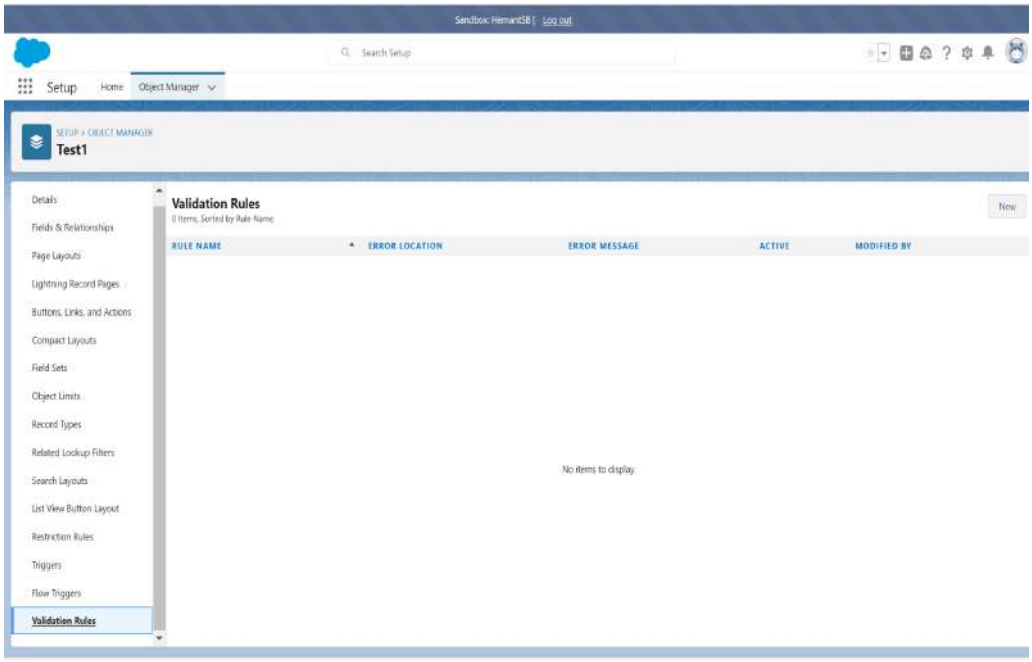
Validation Rules : Validation rules verify that data entered by users in records meets the standards you specify before they can save it. A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of “True” or “False.”

- ➢ It involves two steps:
  - ○ error condition(Formula/Expression)
  - ○ error message
    - ■ can be displayed on top of the page.
    - ■ can be displayed in front of any field.
- ➢ It also maintains the data quality.
- ➢ Avoid storing unnecessary data.
- ➢ One way of making a field mandatory.



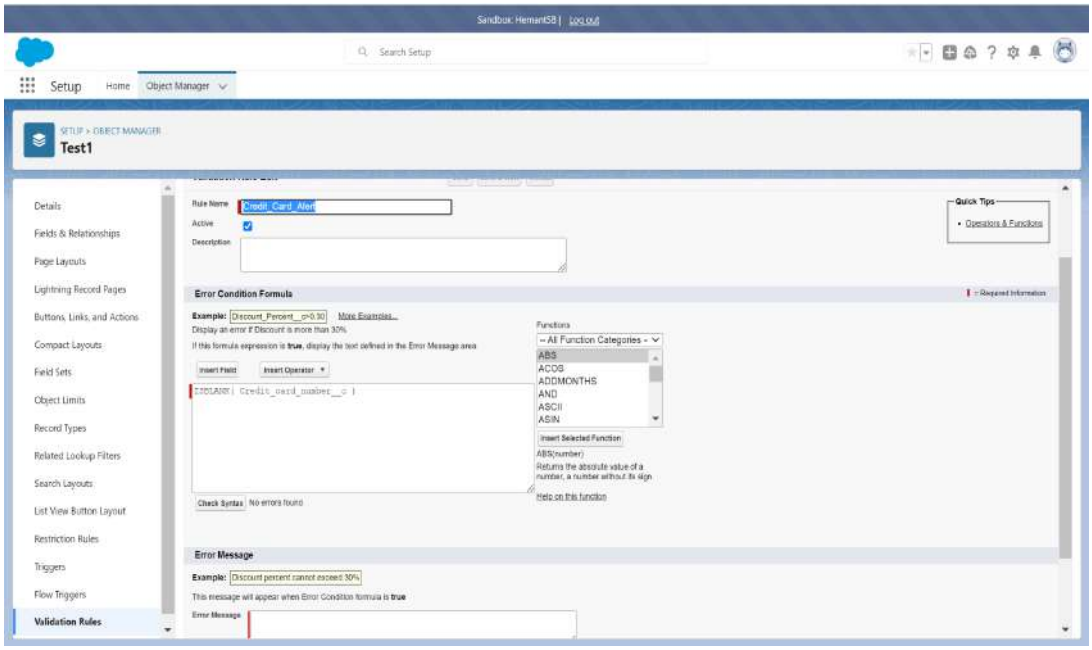
Steps To create Validation Rules :

- Click the **Object Manager tab**
- In object Manager Go to **Validation Rules**

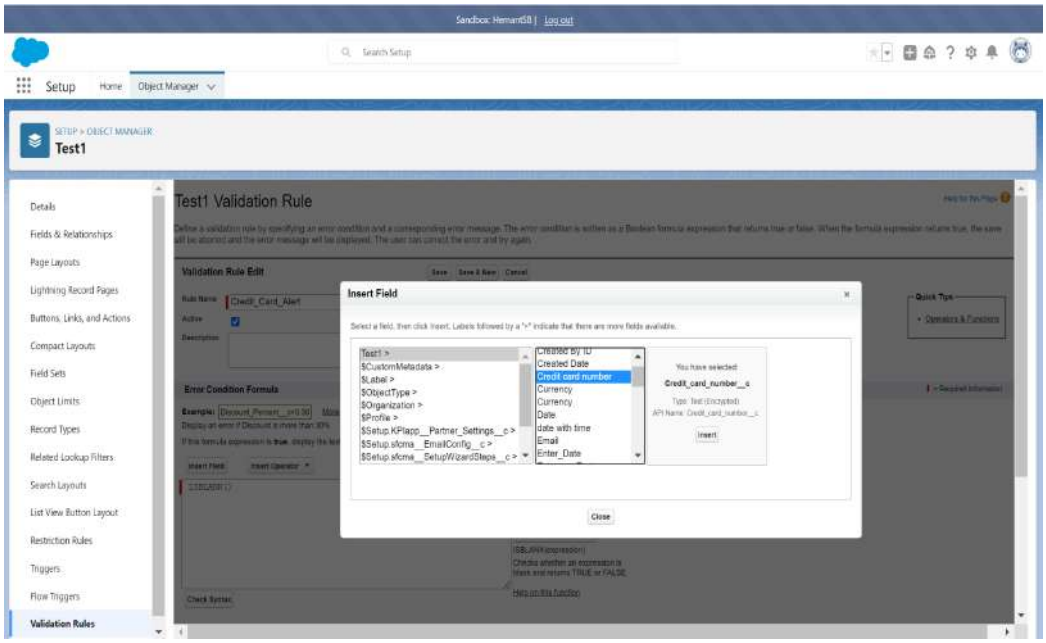


- Click on **New**

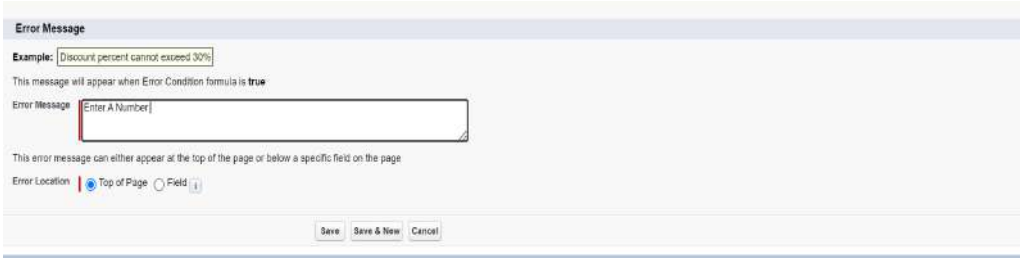
- Enter **Rule Name** And Click On Active Checkbox Button



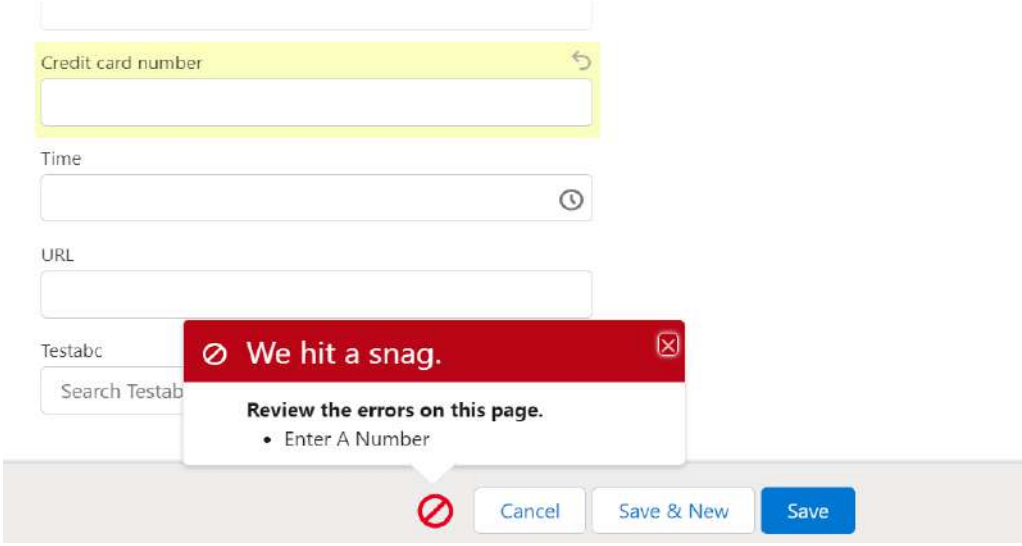
- Enter A **Validation Rule**



- **Enter A Error Message And Error Location And** Click On **Next, Next And Save**

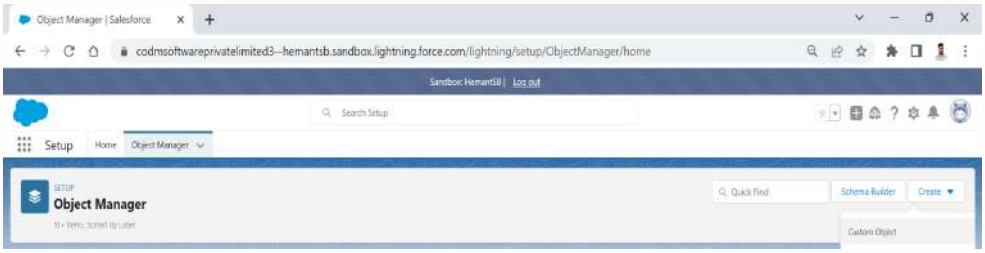


- Let Us Understand With The Example Of not inputting A value To credit card field
- We will get this **Error** :

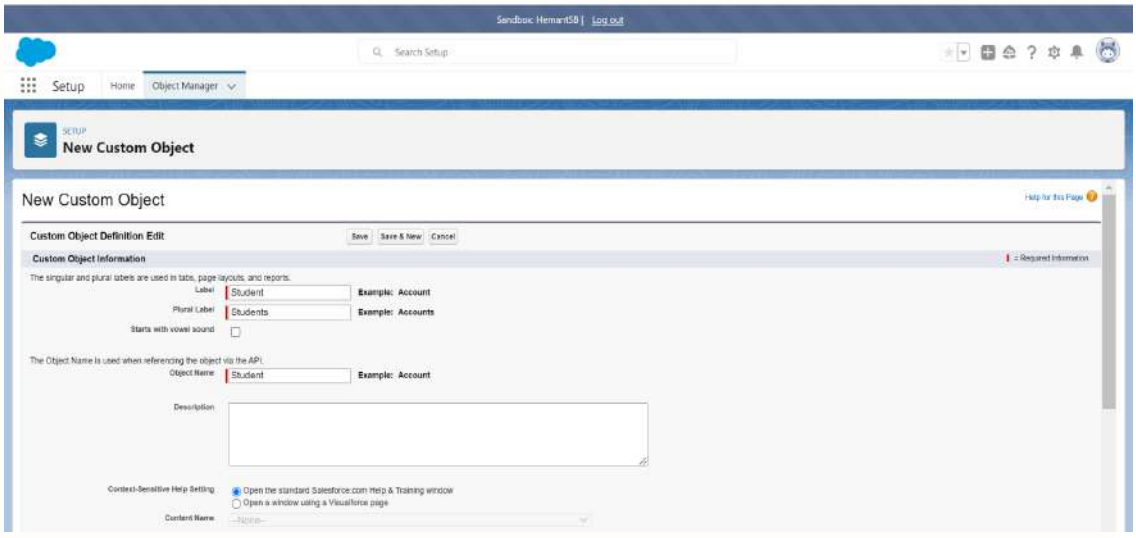


Example Covering Mostly Questions / Topics :

1. In your Salesforce org/sandbox , click the cog icon, and select **Setup**.
2. Click the **Object Manager** tab.
3. Click **Create** > **Custom Object** in the top-right corner.

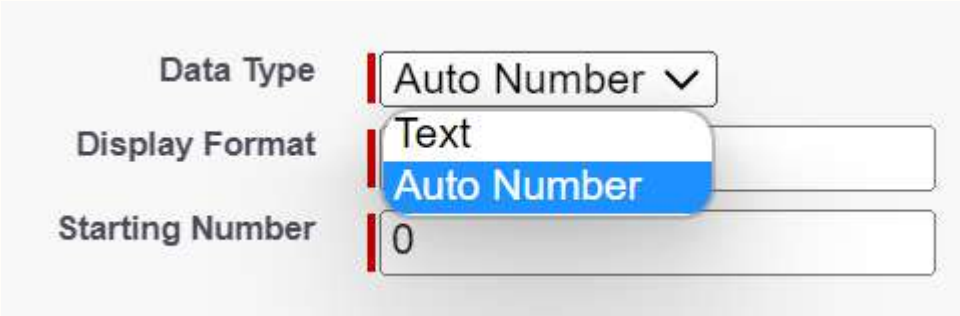


4. In the *Label* section, enter whatever you want to call your custom object. The Label and A plural Label **Example : Student , Object Name** and **Record Name** fields will auto-fill with the same name.

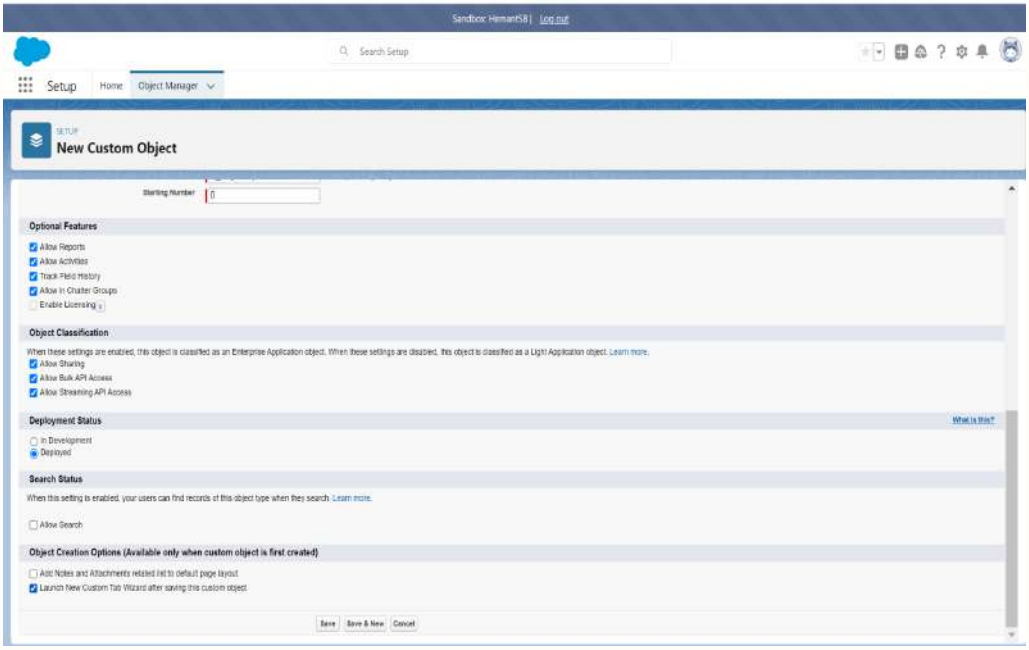


5. Enter Data Type Whether It is **Auto Number And Text** in my **Example :**

I have taken Student ID As Auto Number and display format as : S_id-{0000} and a starting number as 0.



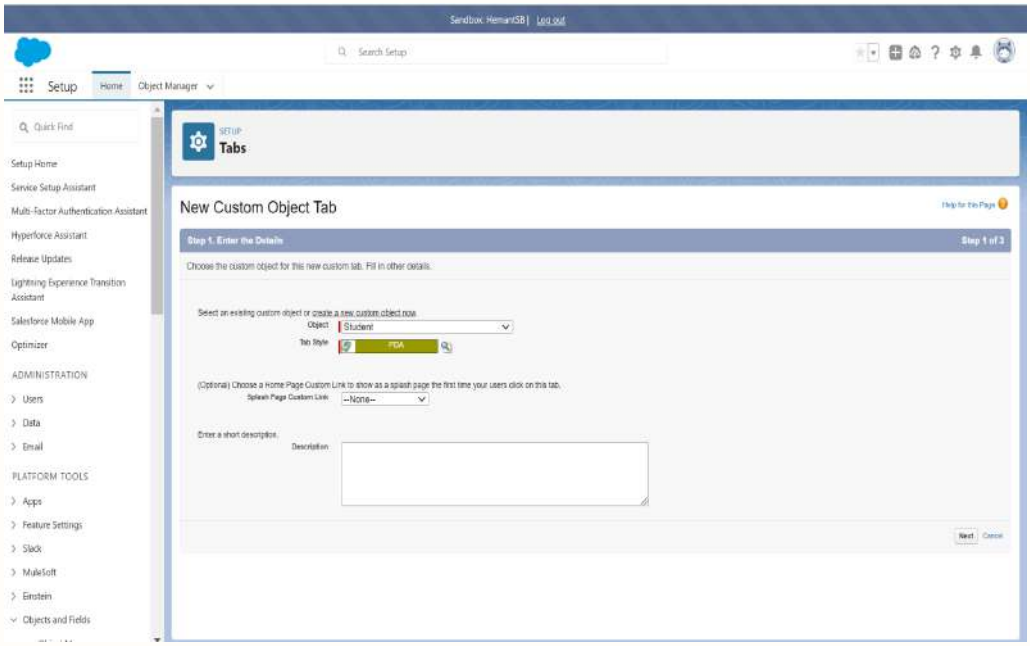
6. ENABLE THIS OPTIONAL FEATURES IF YOU WANT TO :



7. Scroll to the bottom of the page, and select the **checkbox** Launch Custom Tab Wizard after saving this custom object. Selecting this box will add your custom object as a tab in Salesforce.

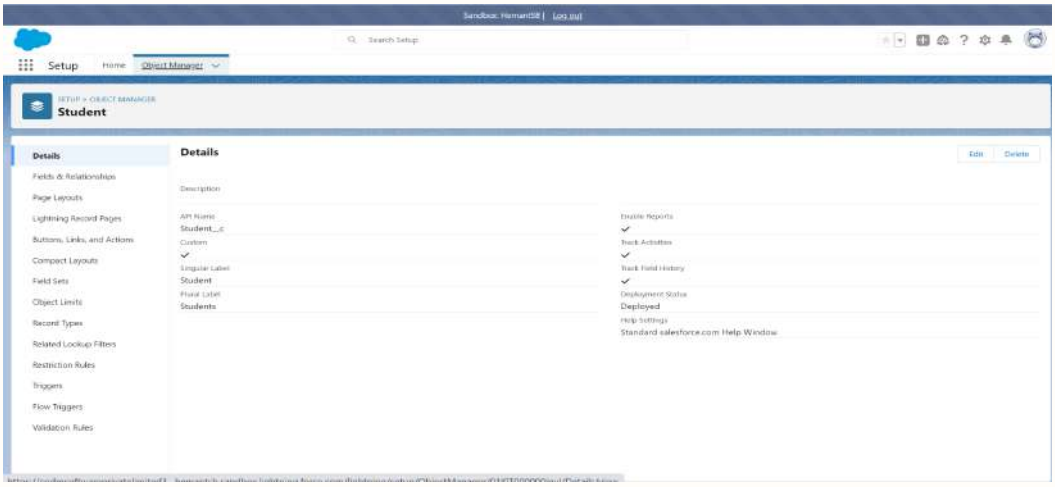
8. Click **Save.**

On the *New Custom Object Tab* page, click the **Tab Style** field, and choose a style. The style sets the icon to display in the UI for the object.



9. Click **Next**, **Next**, and **Save**.

In Object Manager it will appear like this :

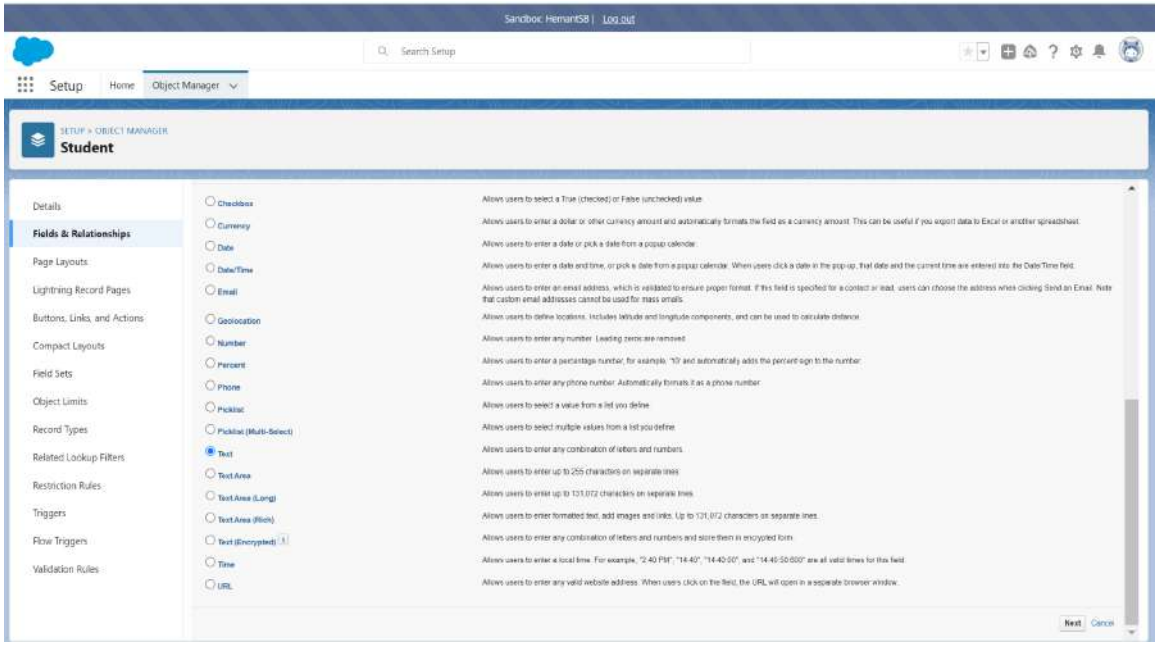


Steps to create a custom field :

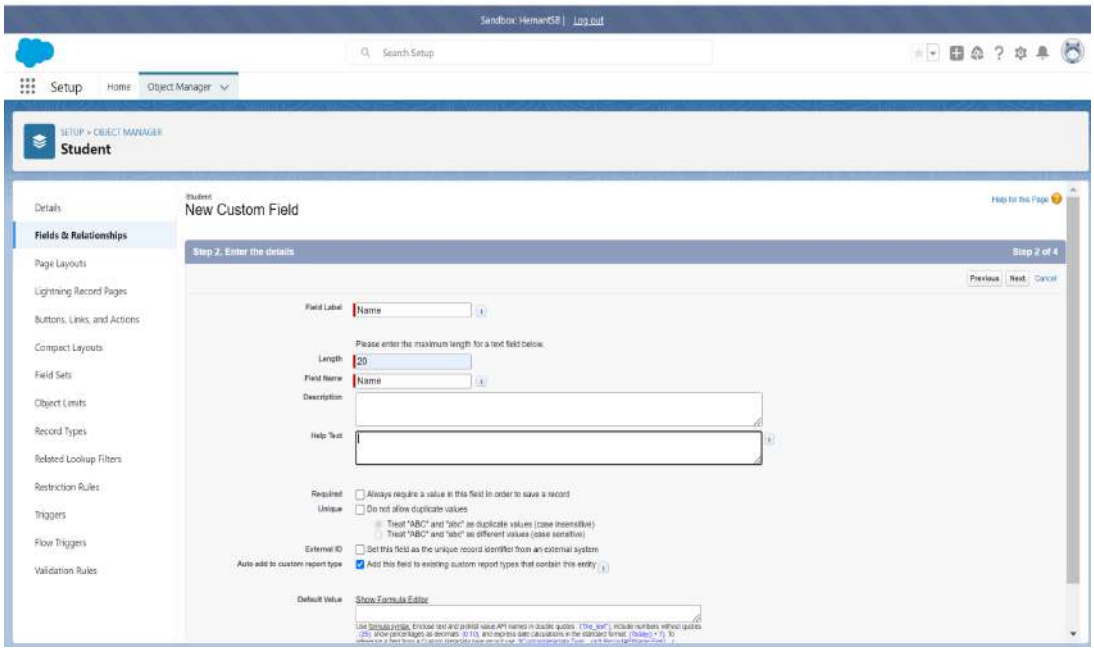
1. Click the **Object Manager** tab

2. In object Manager Go to Field & Relationship And Click On New

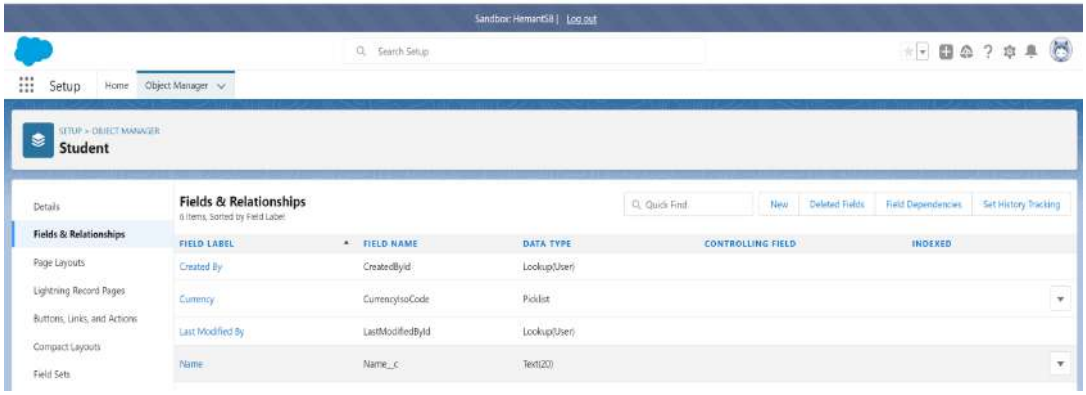
3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Text** and click on Next .



4. In new Custom Fields fill out the Field Label, Field Name,Length and click **Next**.



5. Click Next, Next . Then click Save.

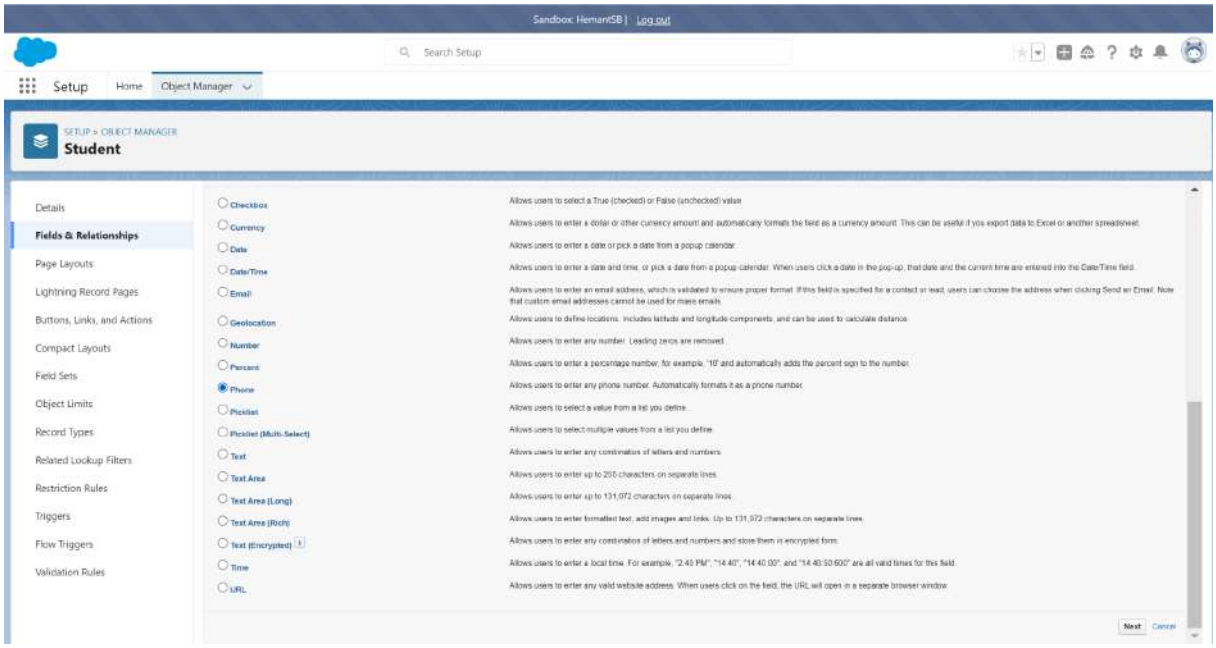


Now Next Field :

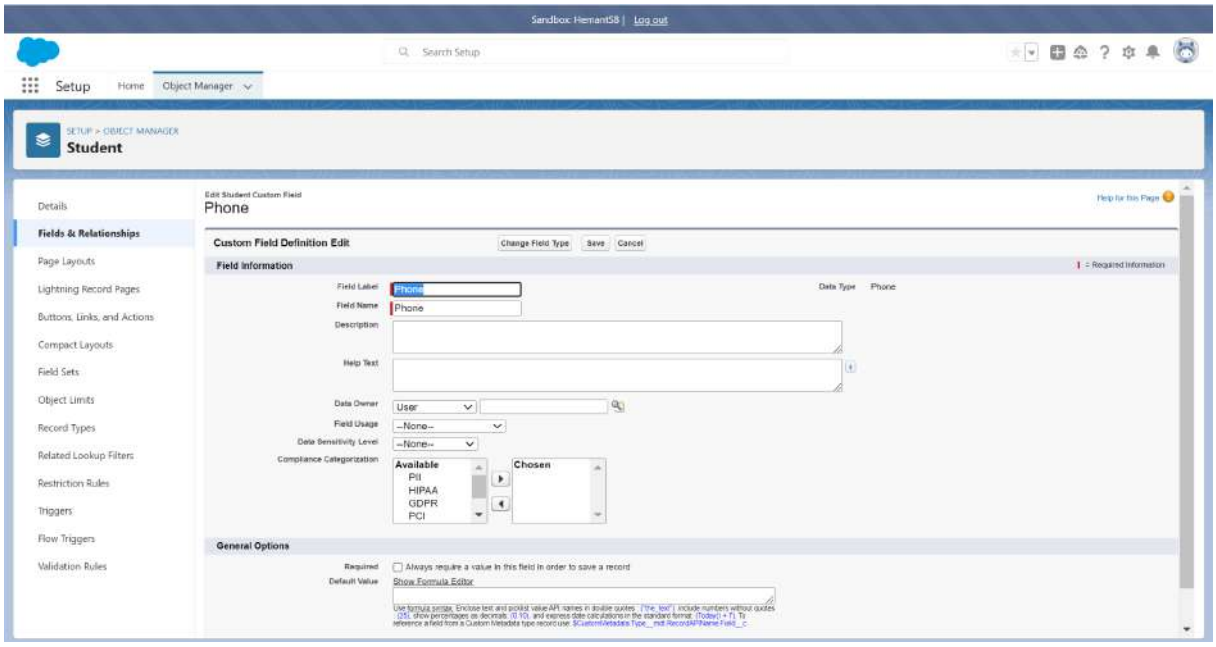
1. Click the **Object Manager** tab

2. In object Manager Go to Field & Relationship And Click On New

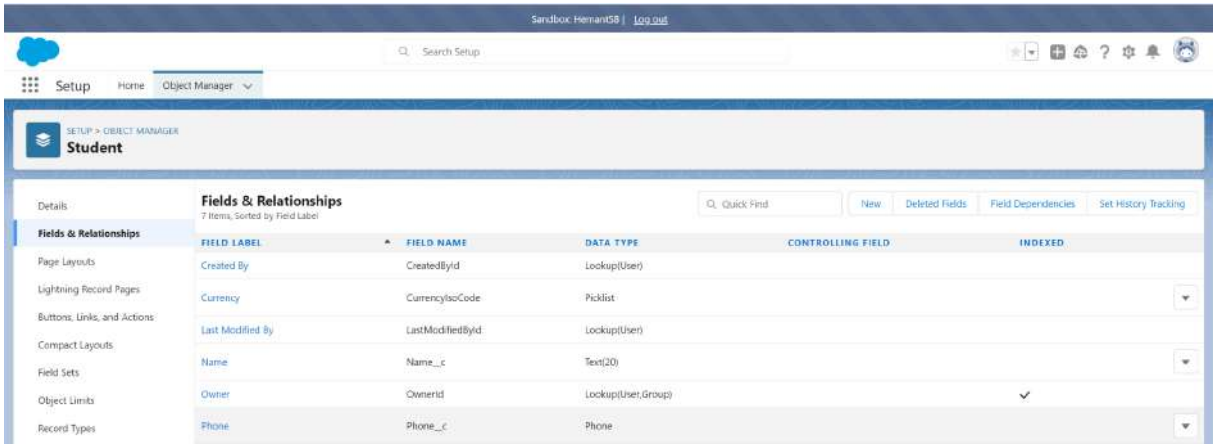
3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Phone** and click on Next .



6. In new Custom Fields fill out the Field Label, Field Name and click **Next**.



7. Click Next, Next . Then click Save.

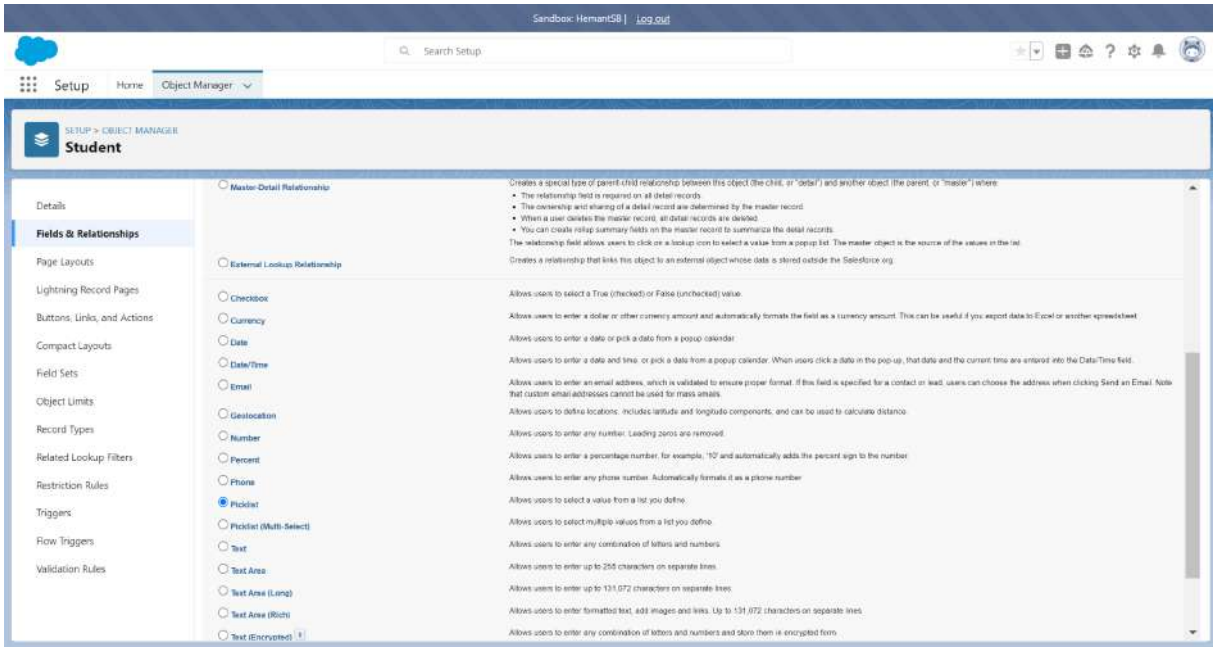


Now Next Field :

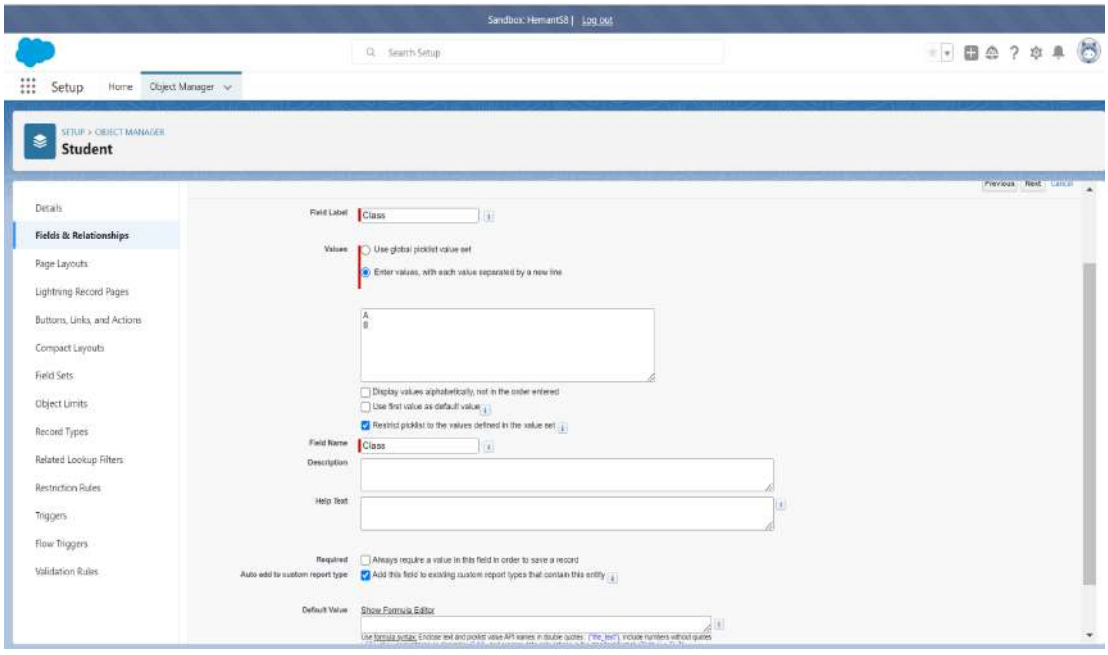
1. Click the **Object Manager** tab

2. In object Manager Go to Field & Relationship And Click On New

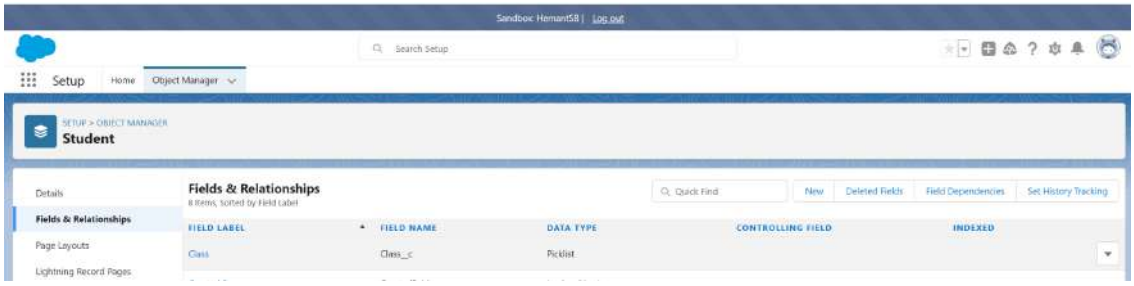
3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Picklist** and click on Next .



4. In new Custom Fields fill out the Field Label, Field Name Values Like **A, B** and click **Next**.



8. Click Next, Next . Then click Save.



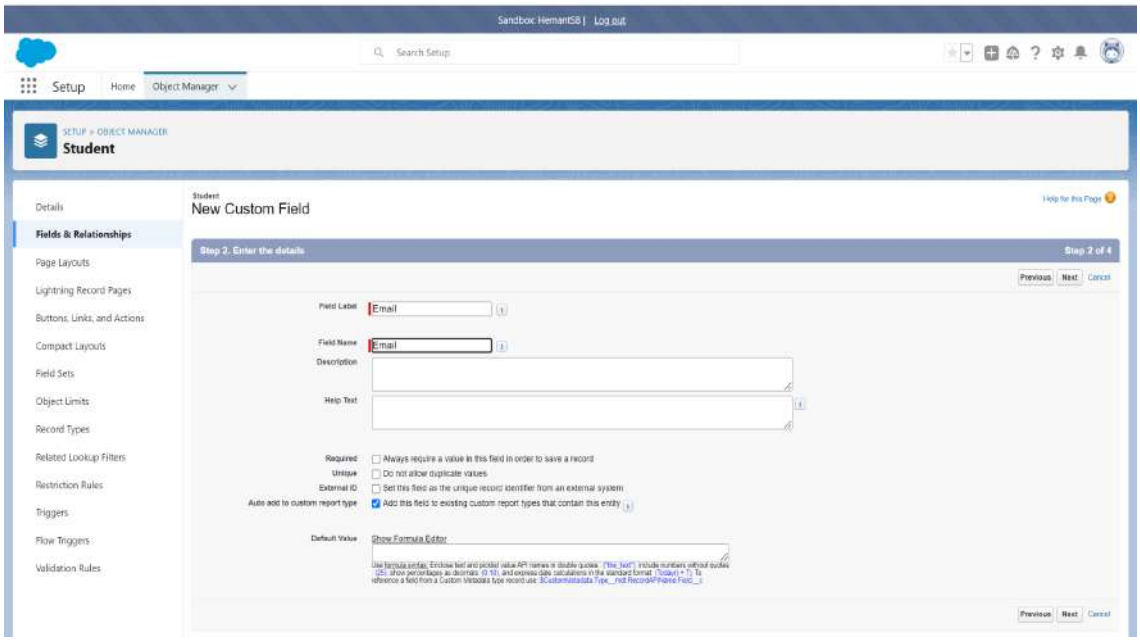
Now Next Field :

1. Click the **Object Manager** tab

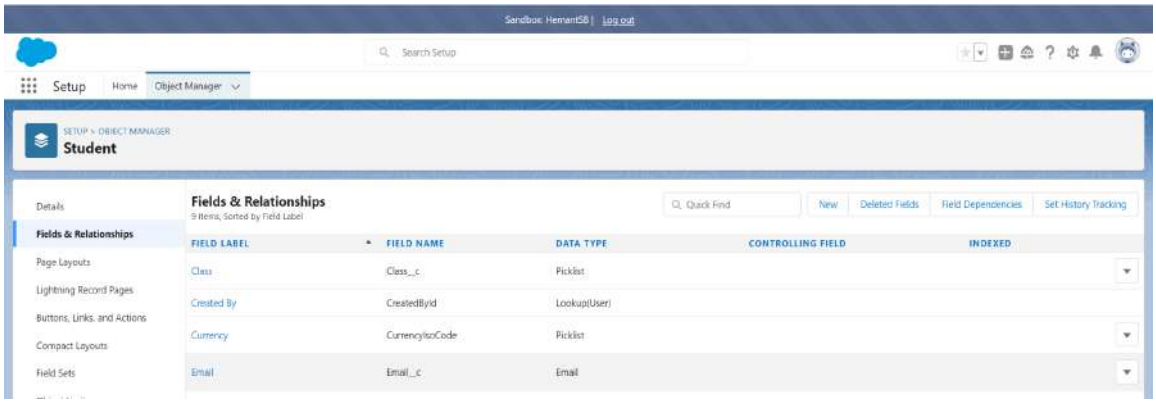
2. In object Manager Go to Field & Relationship And Click On New

3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Email** and click on Next .

4. In new Custom Fields fill out the Field Label, Field Name and click **Next**.



9. Click Next, Next . Then click Save.

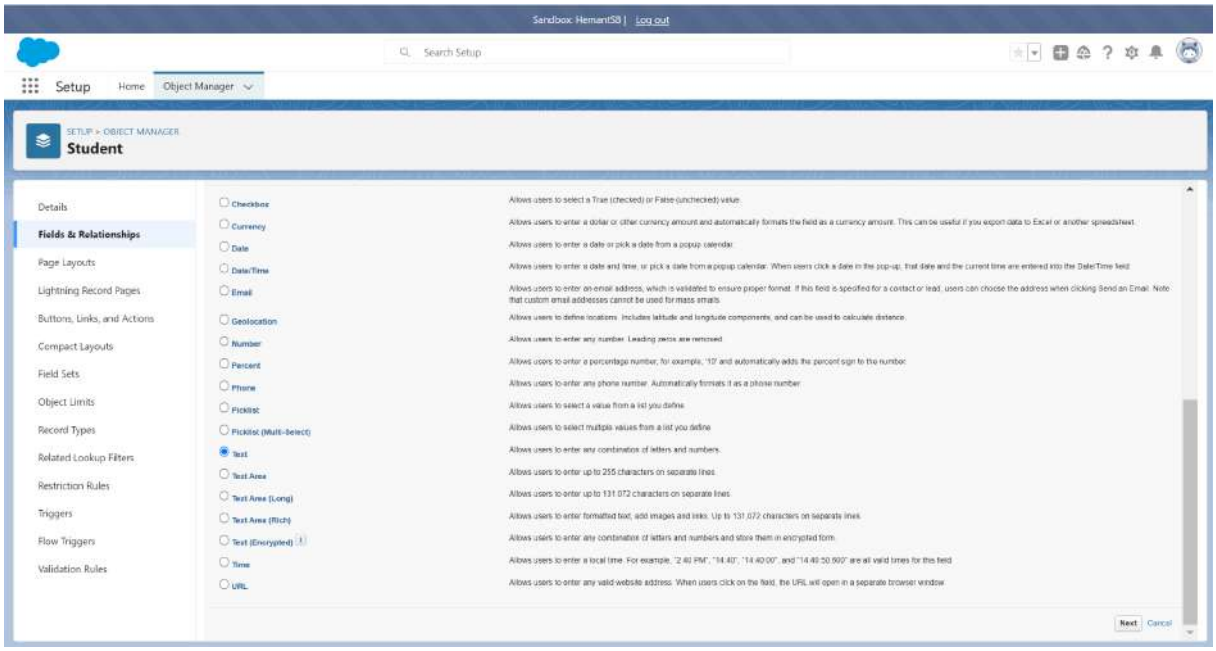


Now Next Field :

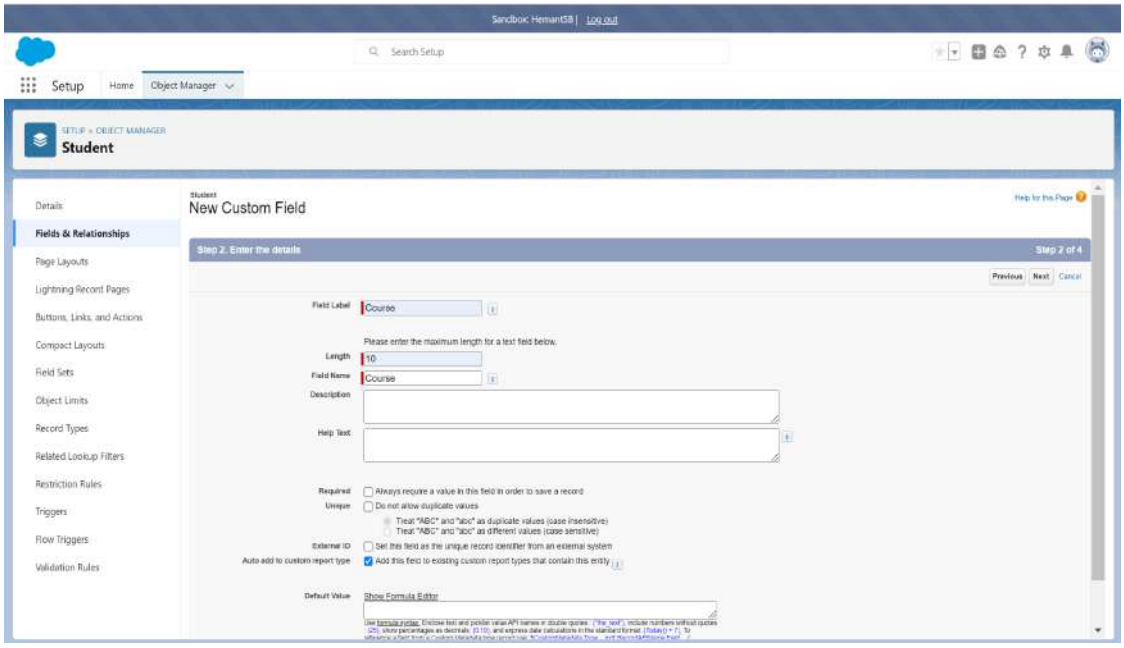
1. Click the **Object Manager** tab

2. In object Manager Go to Field & Relationship And Click On New

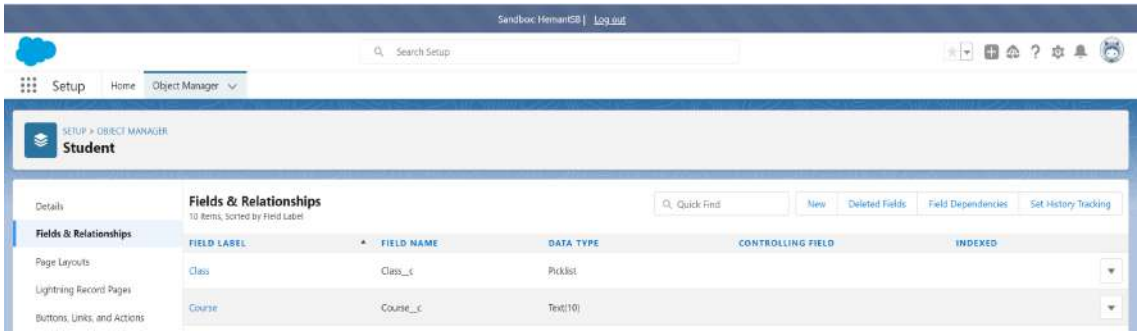
3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Text** and click on Next .



5. In new Custom Fields fill out the Field Label, Field Name And Length and click **Next**.



10. Click **Next, Next . Then click Save.**

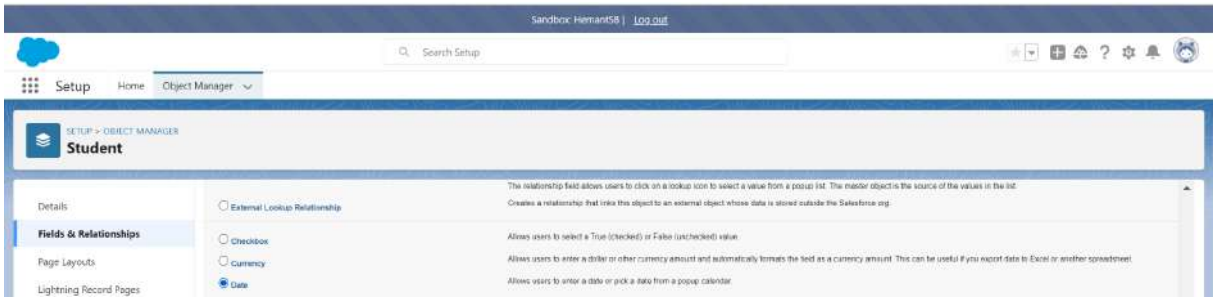


Now Next Field :

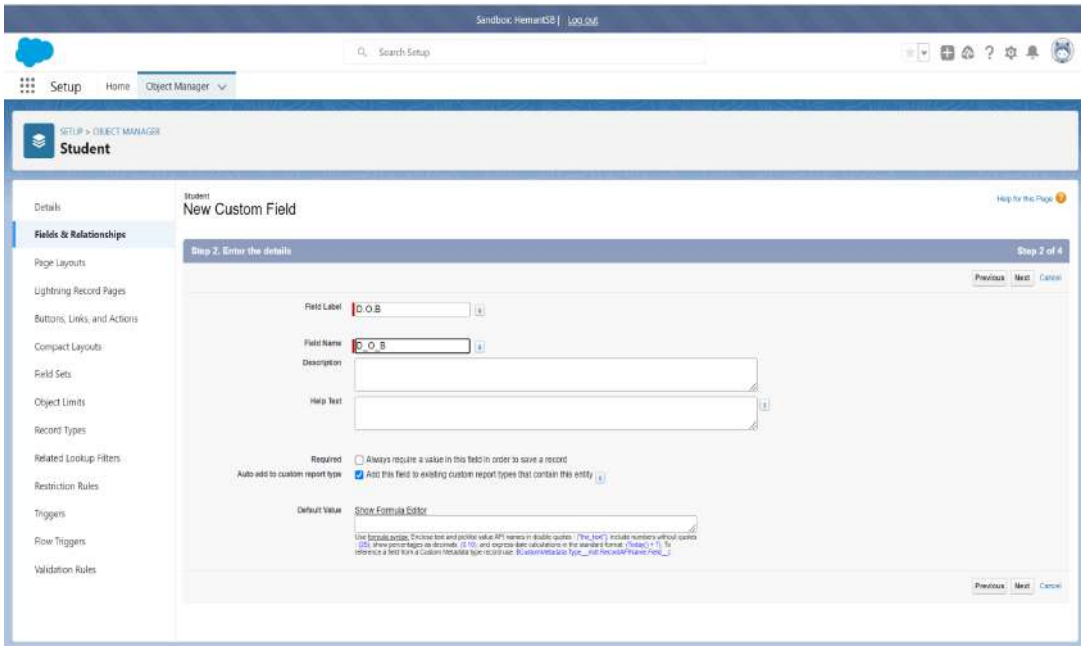
1. Click the **Object Manager** tab

2. In object Manager Go to Field & Relationship And Click On New

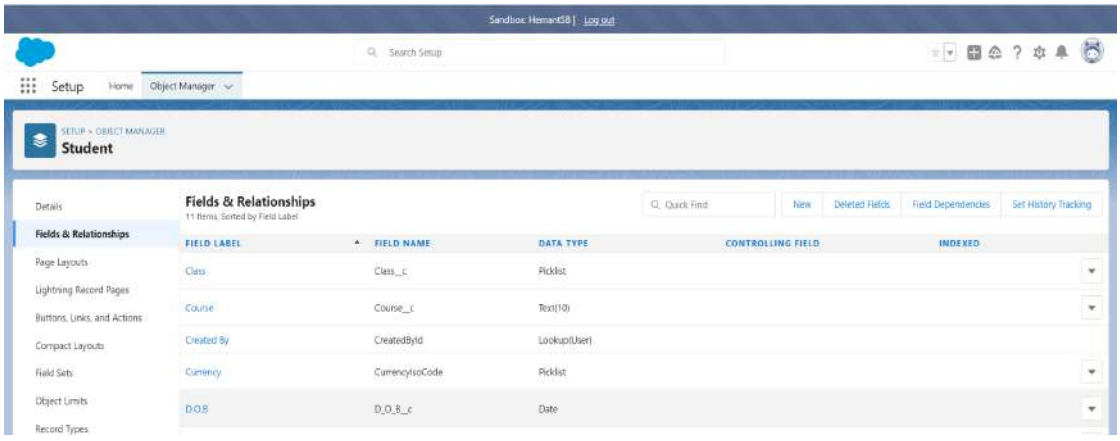
3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Date For My example D.O.B** and click on Next .



4. In new Custom Fields fill out the Field Label, Field Name and click **Next**.



5. Click **Next, Next . Then click Save.**

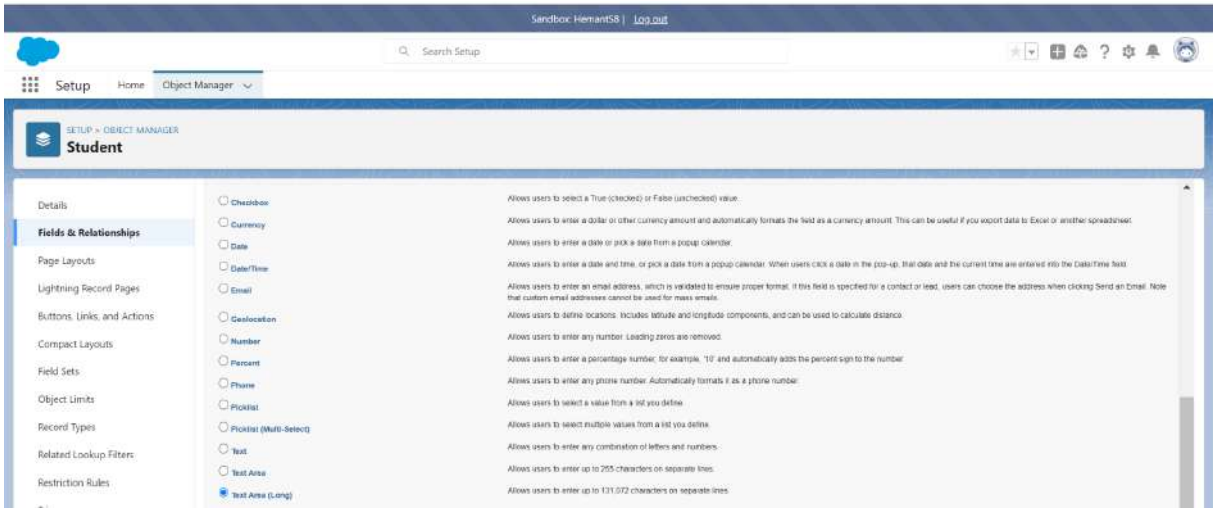


Now Next Field :

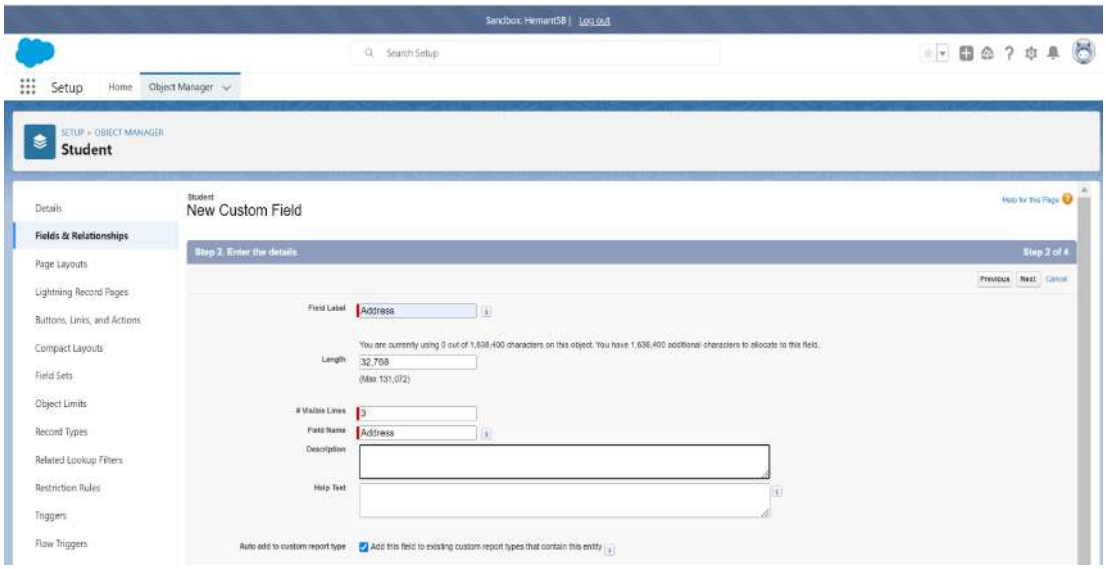
1. Click the **Object Manager** tab

2. In object Manager Go to Field & Relationship And Click On New

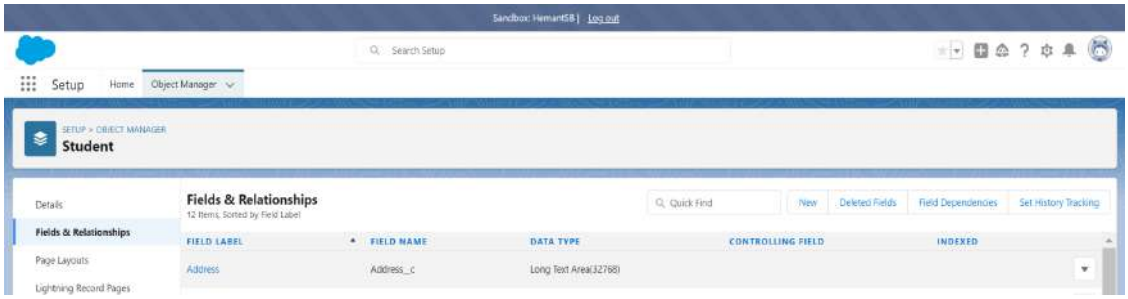
3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Text Area Long** and click on Next .



4. In new Custom Fields fill out the Field Label, Field Name , Visible Lines And Length and click **Next**.



5. Click **Next, Next . Then click Save.**

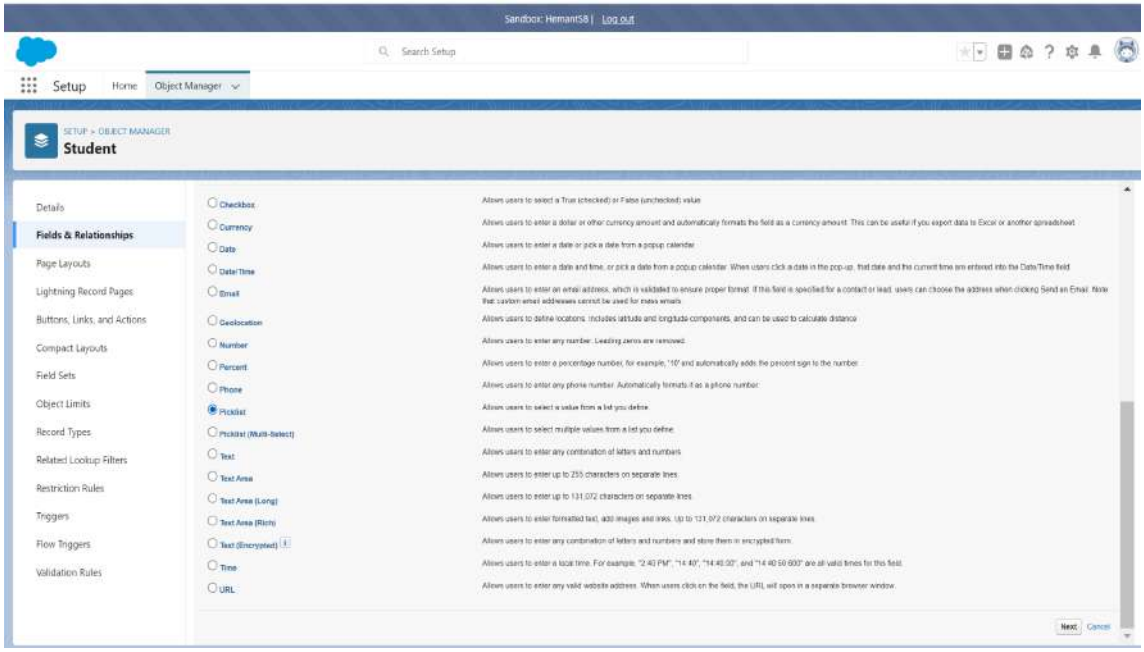


Now Next Field :

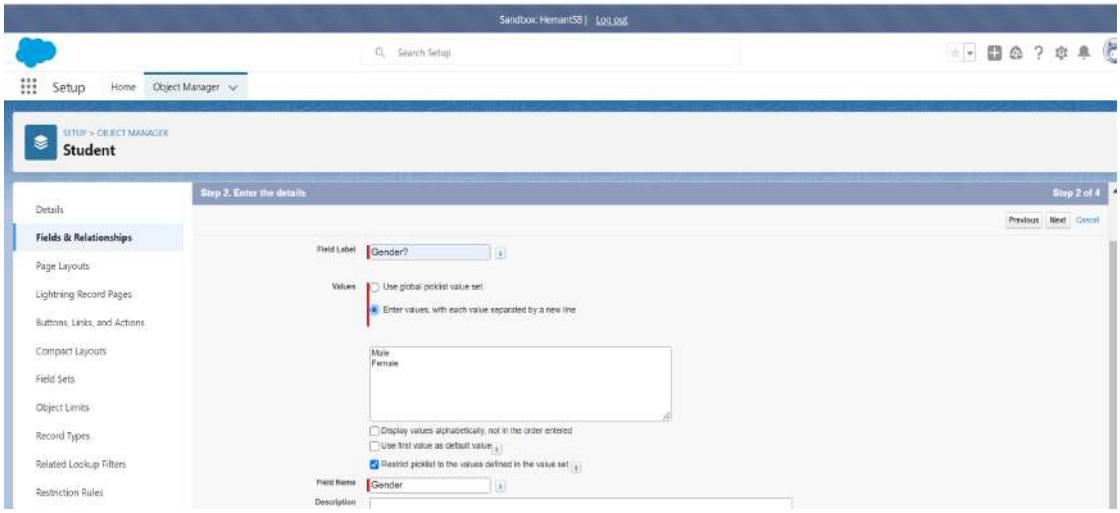
1. Click the **Object Manager** tab

2. In object Manager Go to Field & Relationship And Click On New

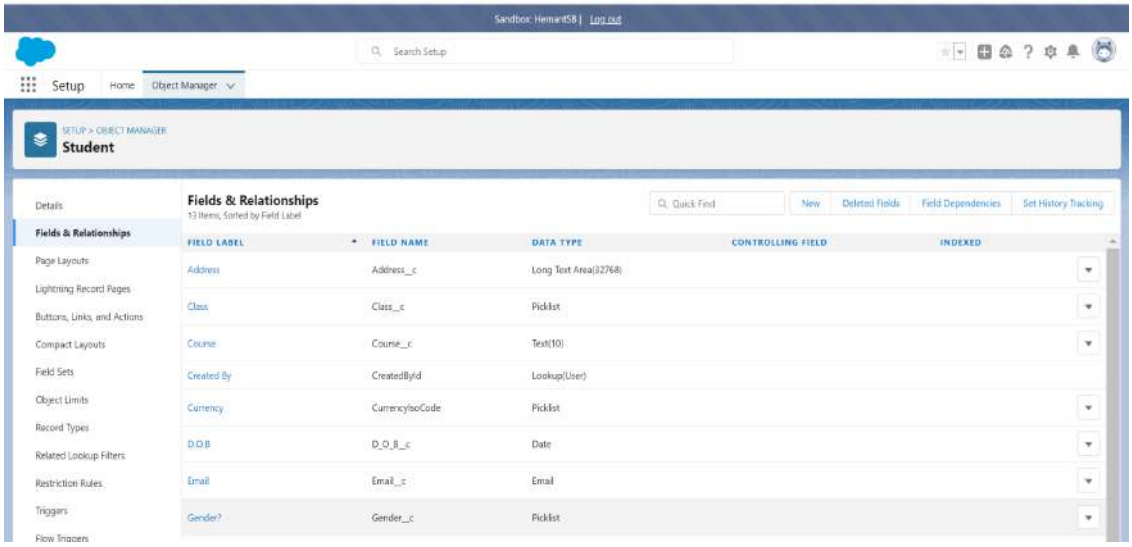
3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Picklist** and click on Next .



4. In new Custom Fields fill out the Field Label, Field Name , **Values Like Male , Female** and click **Next**.



5. Click **Next, Next . Then click Save.**

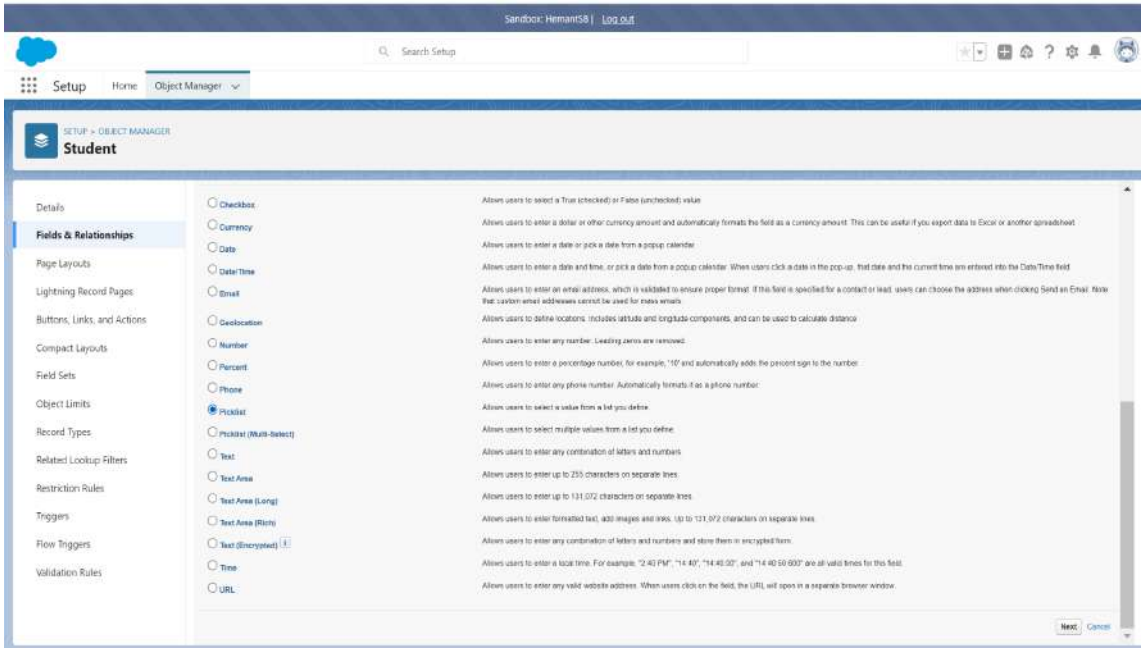


Now Next Field :

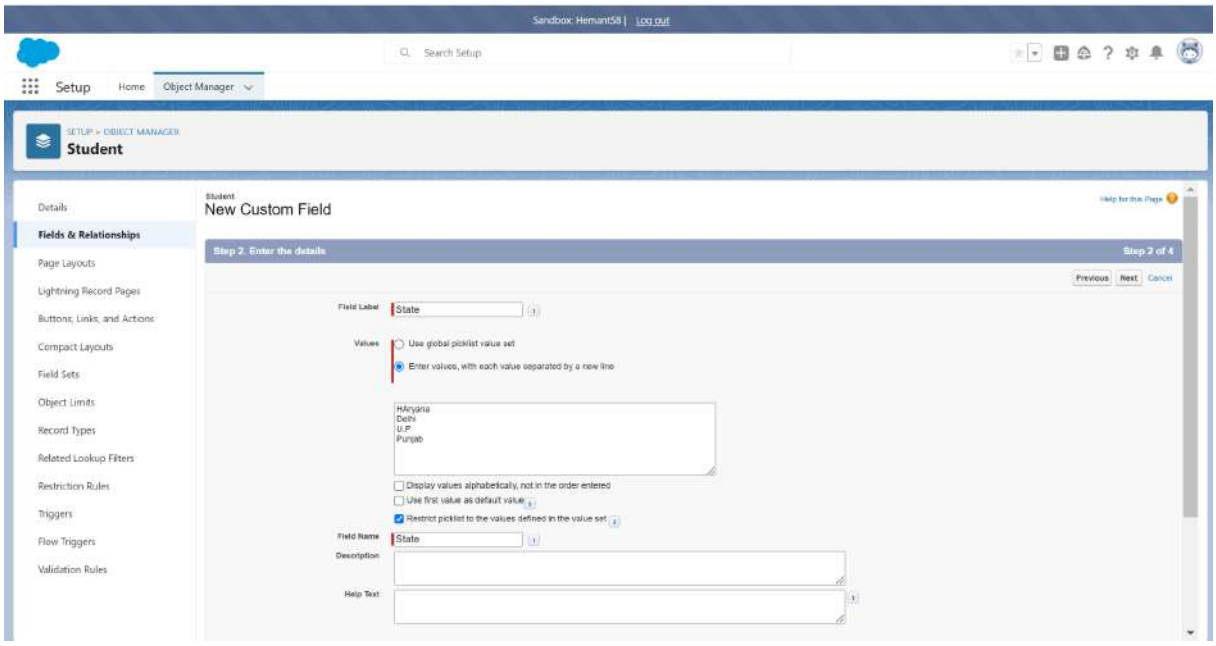
1. Click the **Object Manager** tab

2. In object Manager Go to Field & Relationship And Click On New

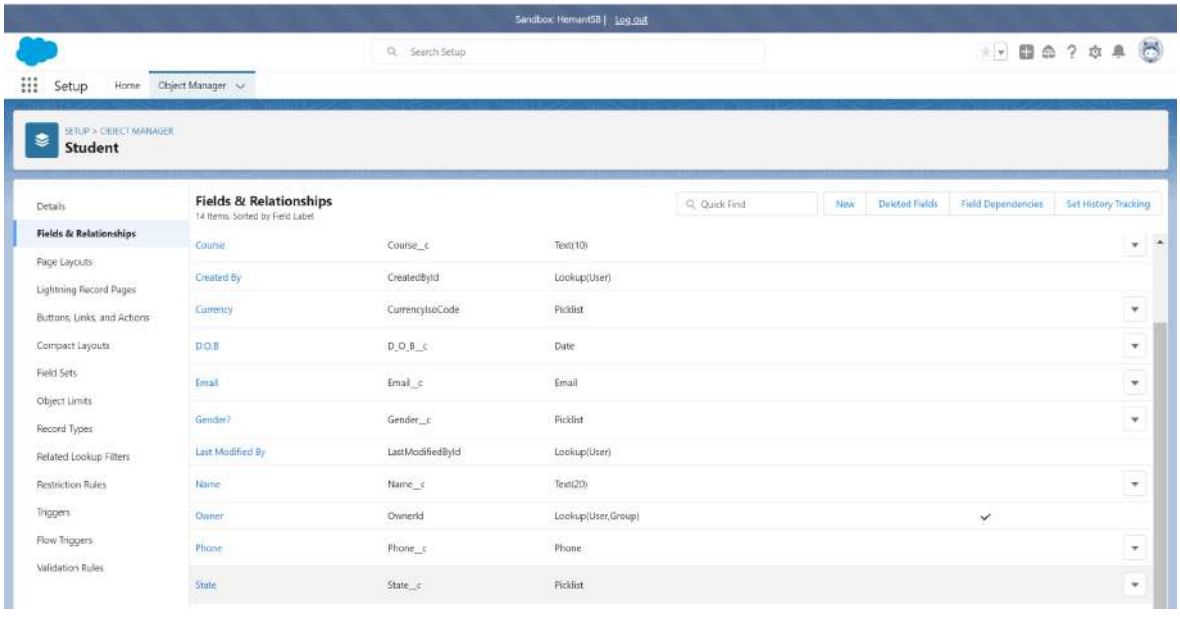
3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Picklist** and click on Next .



4. In new Custom Fields fill out the Field Label, Field Name , **Values Like Haryana , Delhi, U.P, Punjab** and click **Next**.



5. Click **Next, Next . Then click Save.**

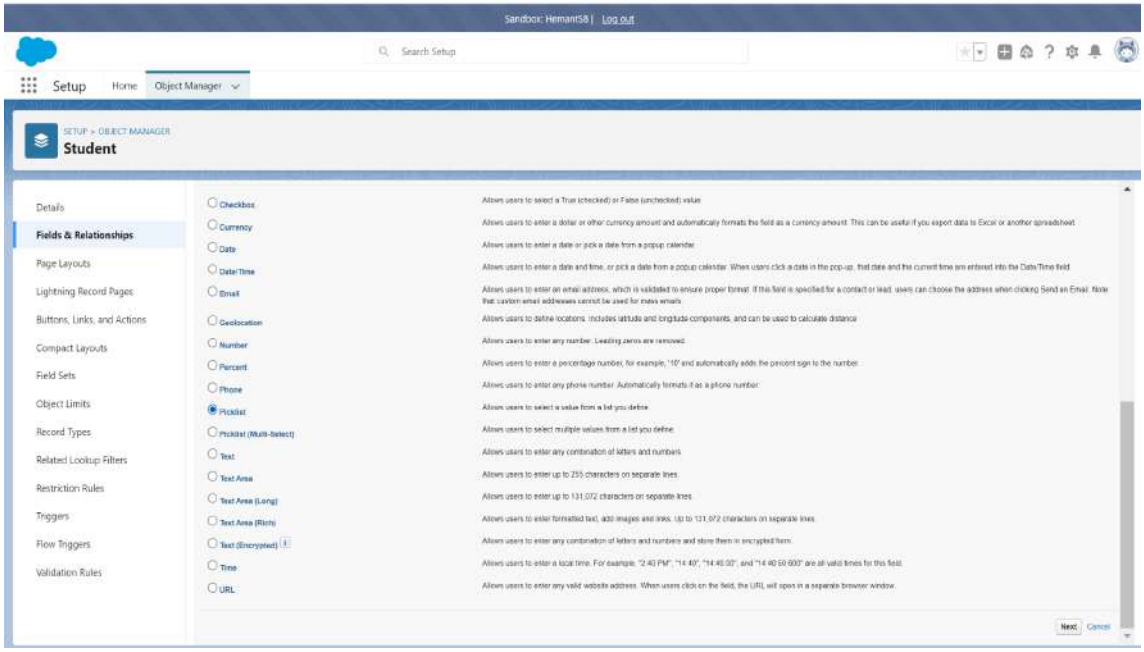


Now Next Field :

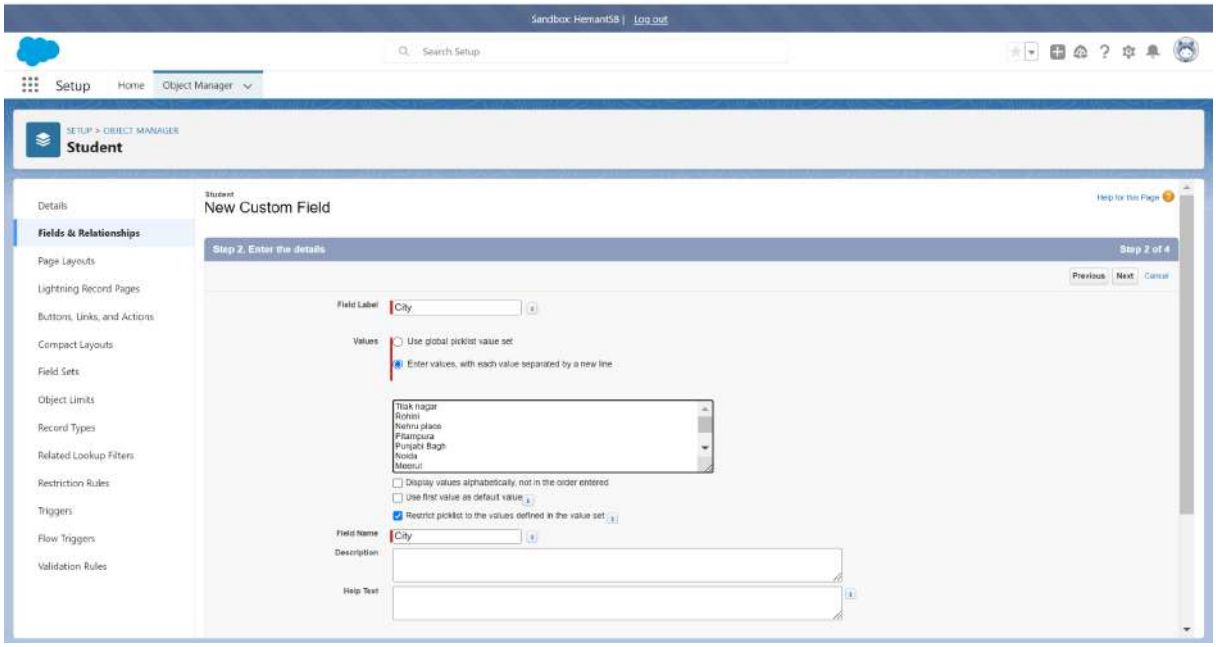
1. Click the **Object Manager** tab

2. In object Manager Go to Field & Relationship And Click On New

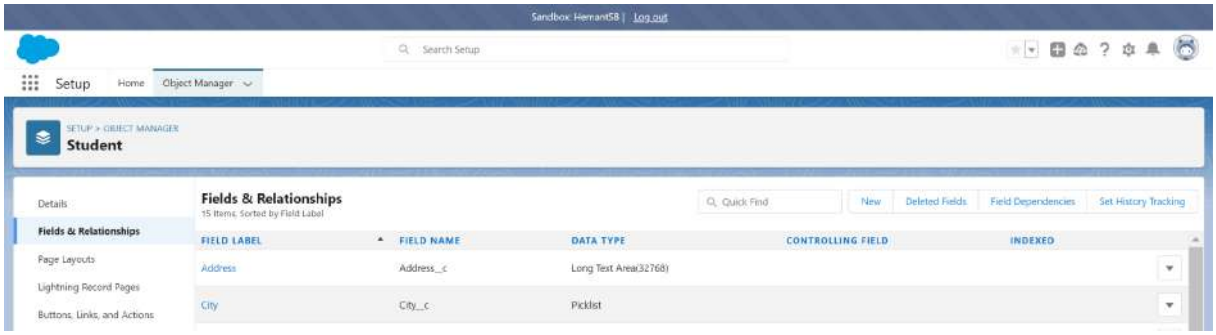
3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Picklist** and click on Next .



4. In new Custom Fields fill out the Field Label, Field Name , **Values Like** Tilak Nagar,Rohini,Nehru Place,Pitampura,PunjabiBagh,Noida,Meerut,Ghaziabad Greater Noida,Kanpur,Bulandseher,Faridabad,Gurgaon,Rohtak,Hisar,Sirsa Mansa,Amritsar,Barnala,Bathinda,Firozpur and click **Next**.



5. Click **Next, Next . Then click Save.**



Now Create A Formula In Age To Calculate AGe From D.O.B

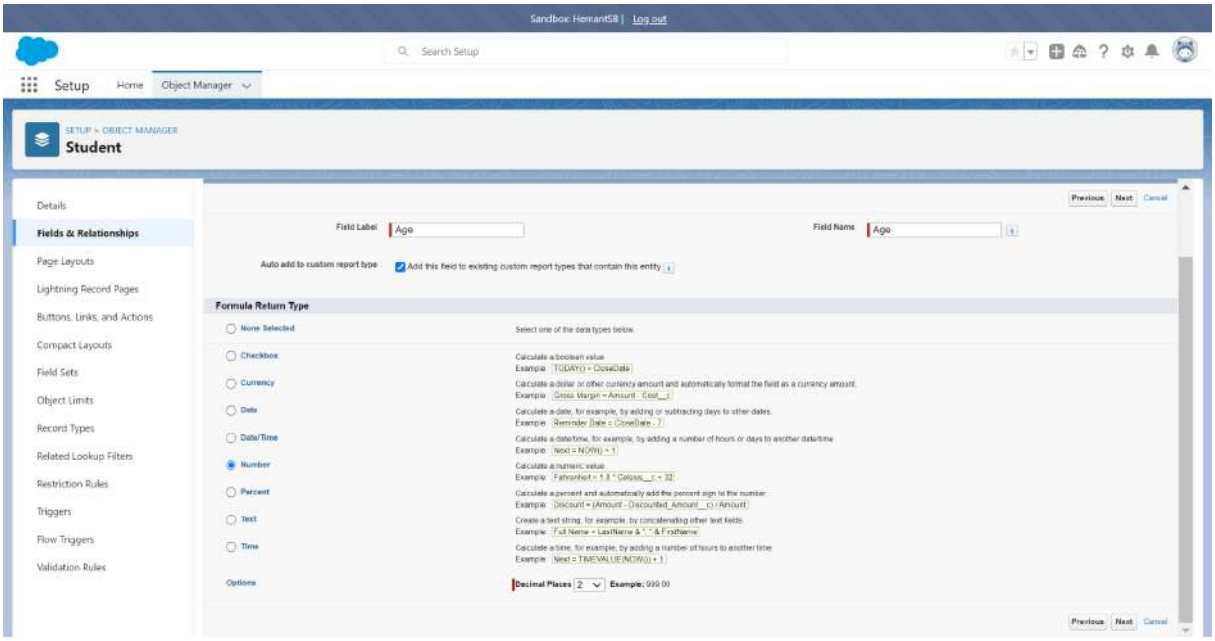
Now Next Field :

1. Click the **Object Manager** tab

2. In object Manager Go to Field & Relationship And Click On New

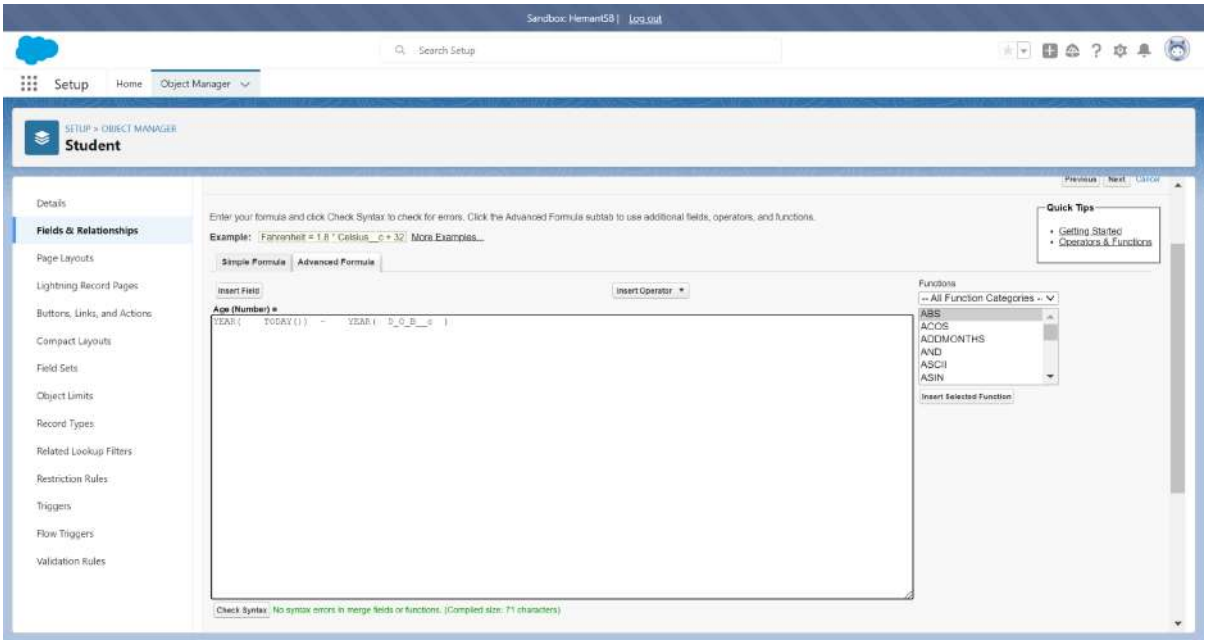
3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Formula** and click on Next .

4. In new Custom Fields fill out the Field Label, Field Name and click **on Formula Return Type**

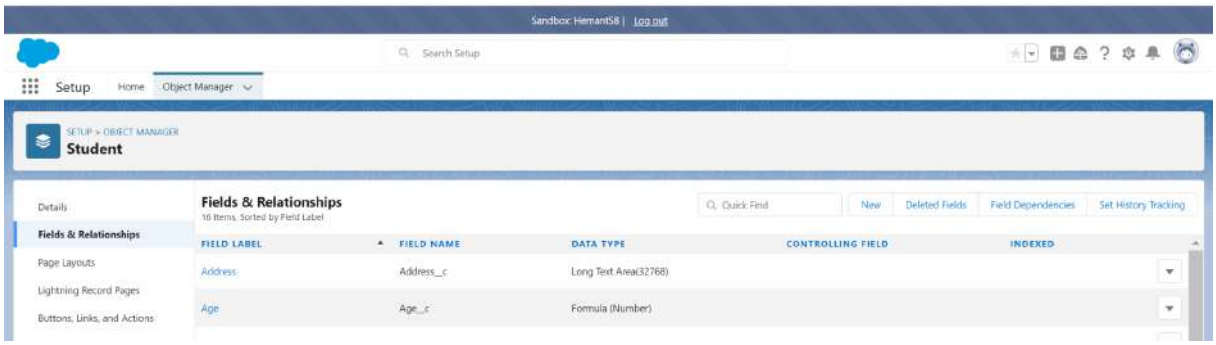


5. Now Select **Number** In Type and click on Next.

6. Enter This In Your Formula Editor : YEAR(TODAY()) - YEAR(DOB__c) as—-



5. Click **Next, Next . Then click Save.**



Now We Are Obtaining MArks

Now Next Field :

1. Click the **Object Manager** tab

2. In object Manager Go to Field & Relationship And Click On New

3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Number** and click on Next .

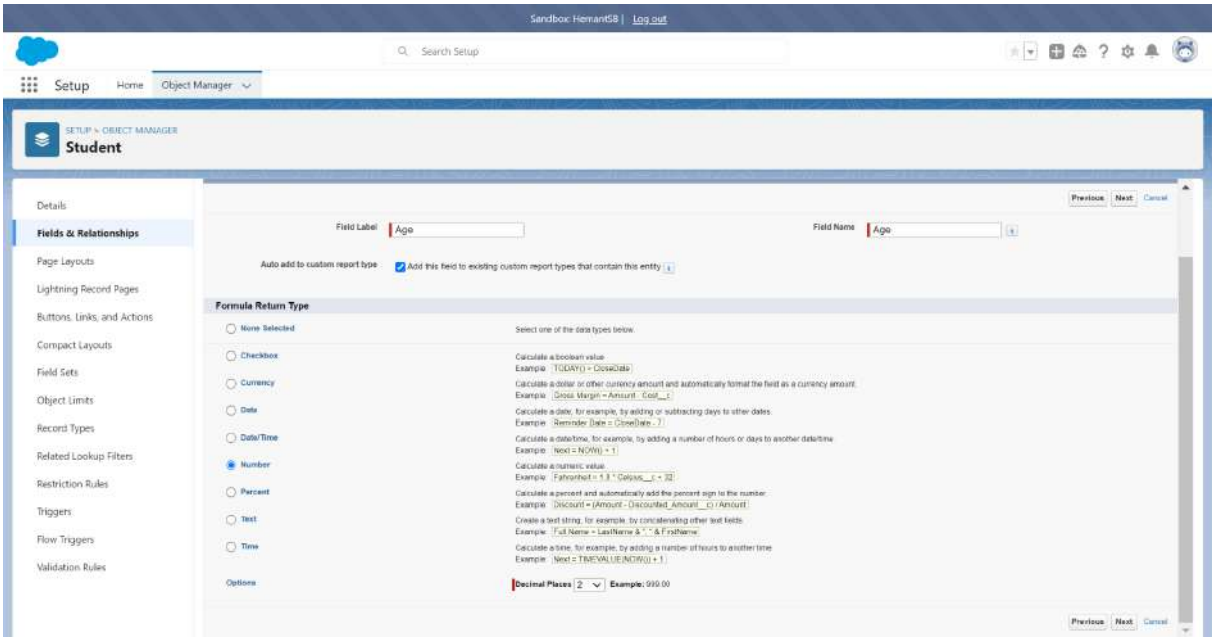
Now Next Field :

1. Click the **Object Manager** tab

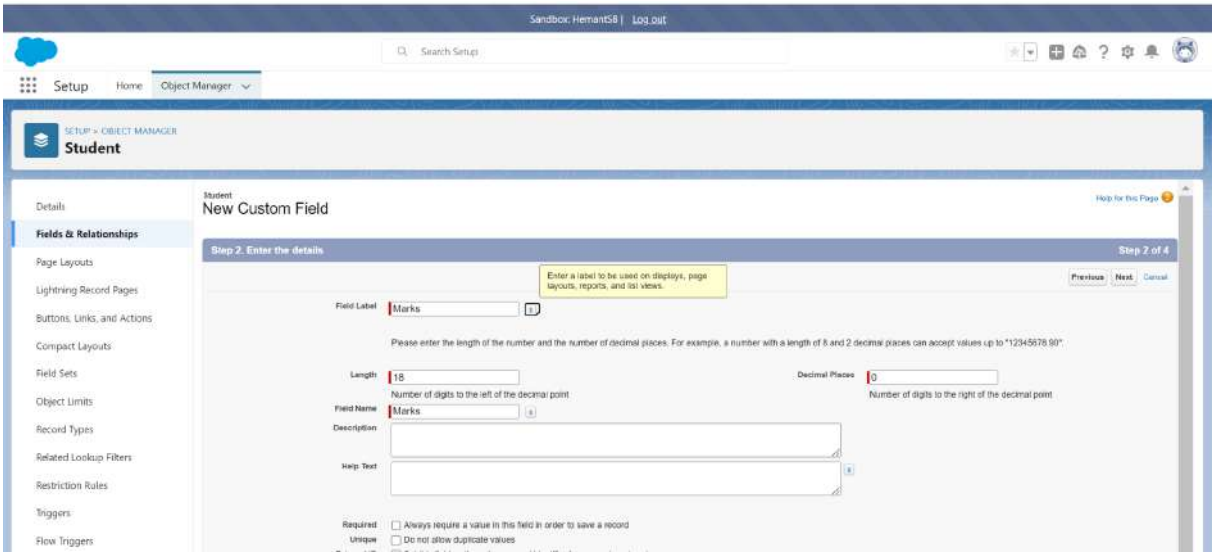
2. In object Manager Go to Field & Relationship And Click On New

3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Formula** and click on Next .

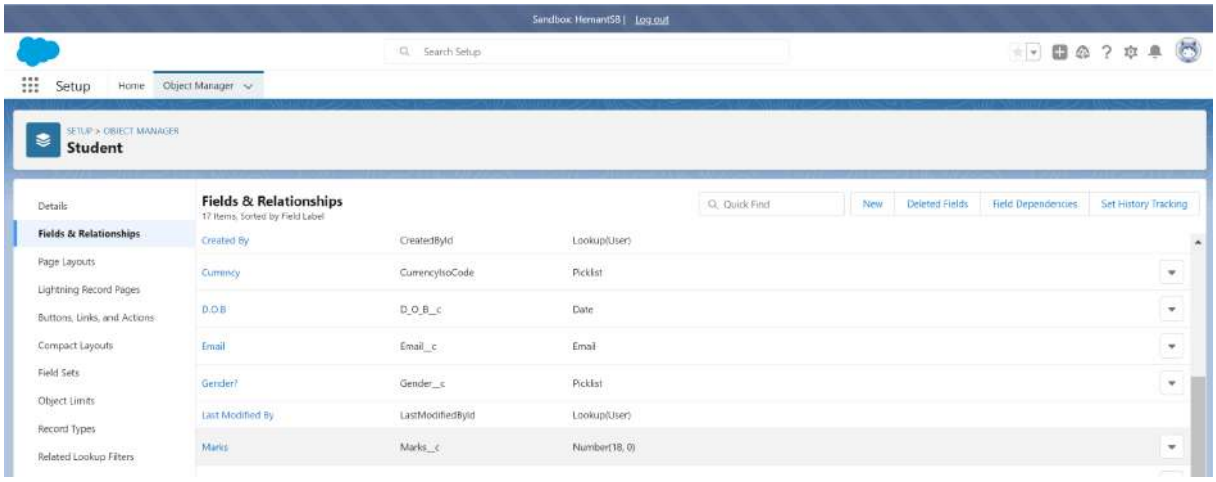
4. In new Custom Fields fill out the Field Label, Field Name and click **on Formula Return Type**



In new Custom Fields fill out the Field Label, Field Name and click **Next**



5. Click **Next, Next . Then click Save.**

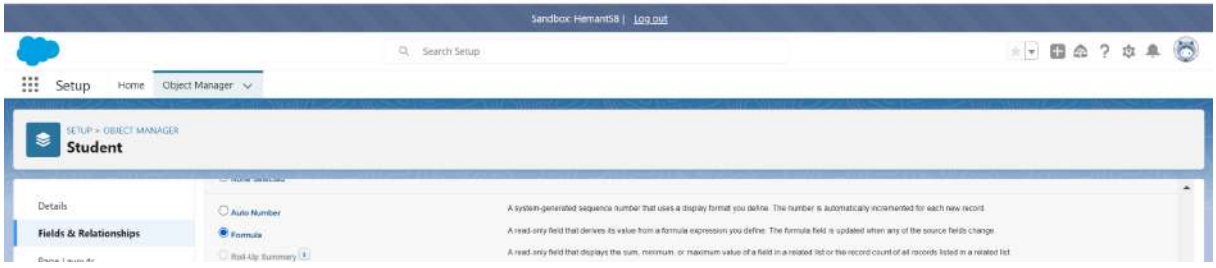


Now Next Field :

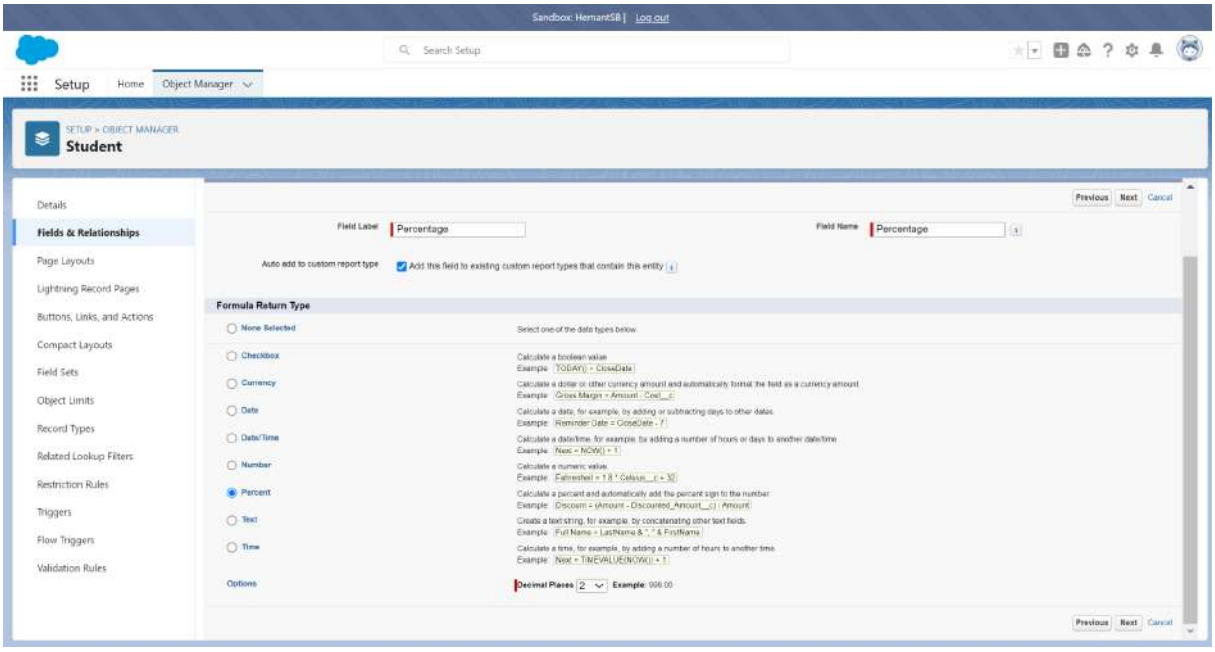
1. Click the **Object Manager** tab

2. In object Manager Go to Field & Relationship And Click On New

3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Formula** and click on Next .

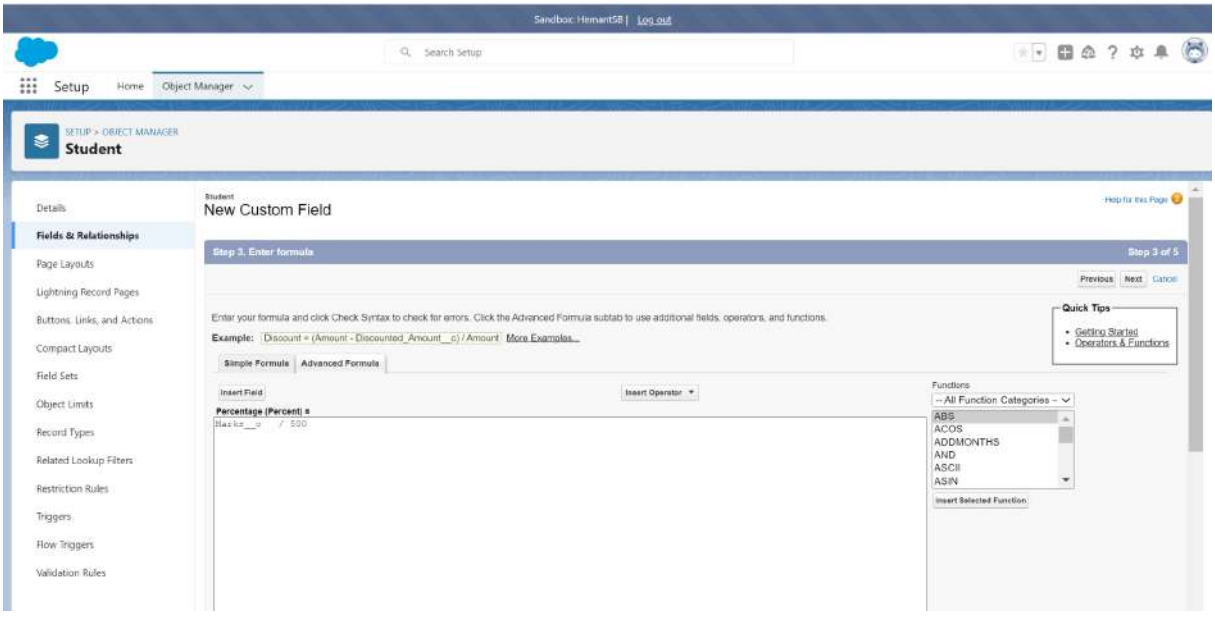


4. In new Custom Fields fill out the Field Label, Field Name and click **on Formula Return Type**

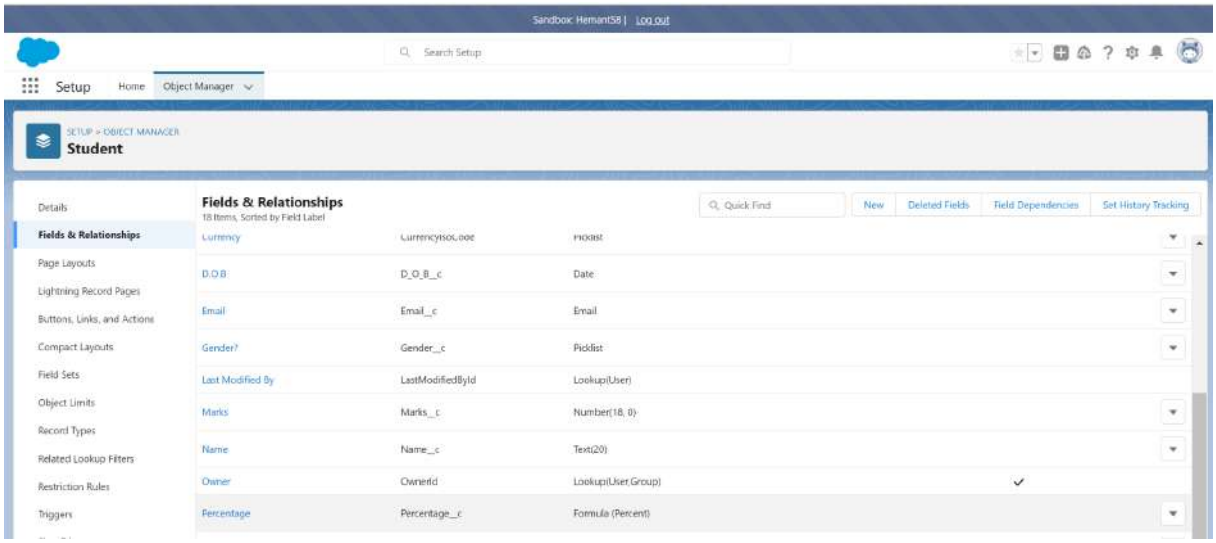


5. Now Select **Text** In Type and click on Next.

6. Enter This In Your Formula Editor : Marks__c / 500 as—-



5. Click **Next, Next . Then click Save.**



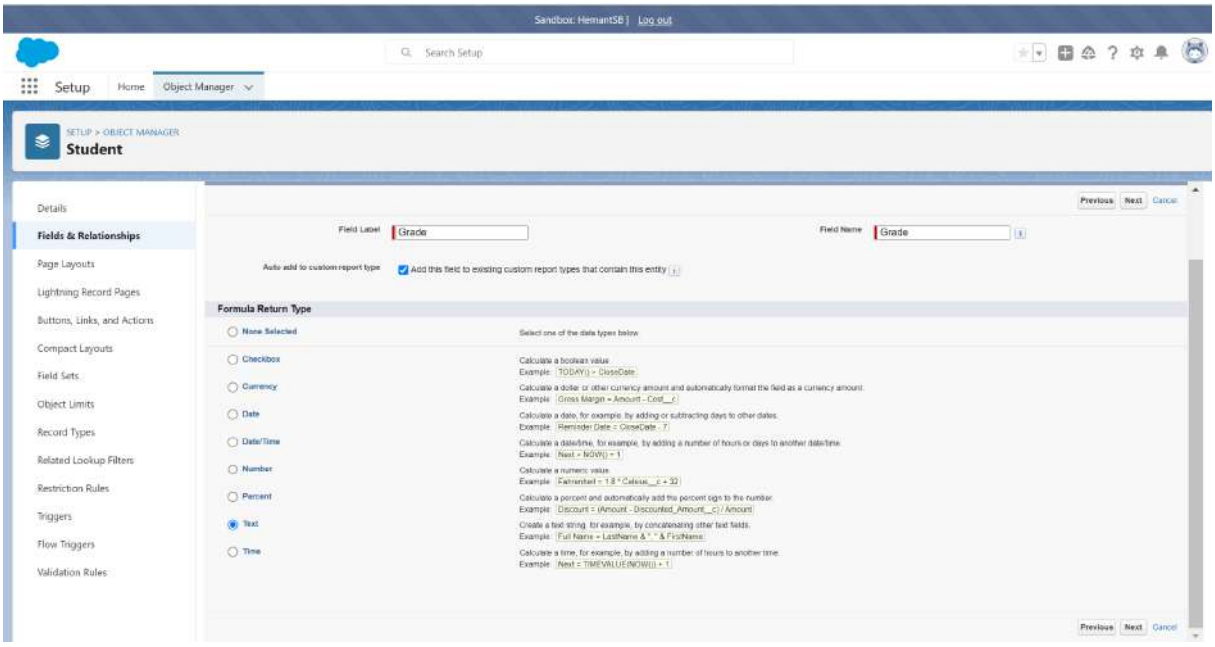
Now Next Field :

1. Click the **Object Manager** tab

2. In object Manager Go to Field & Relationship And Click On New

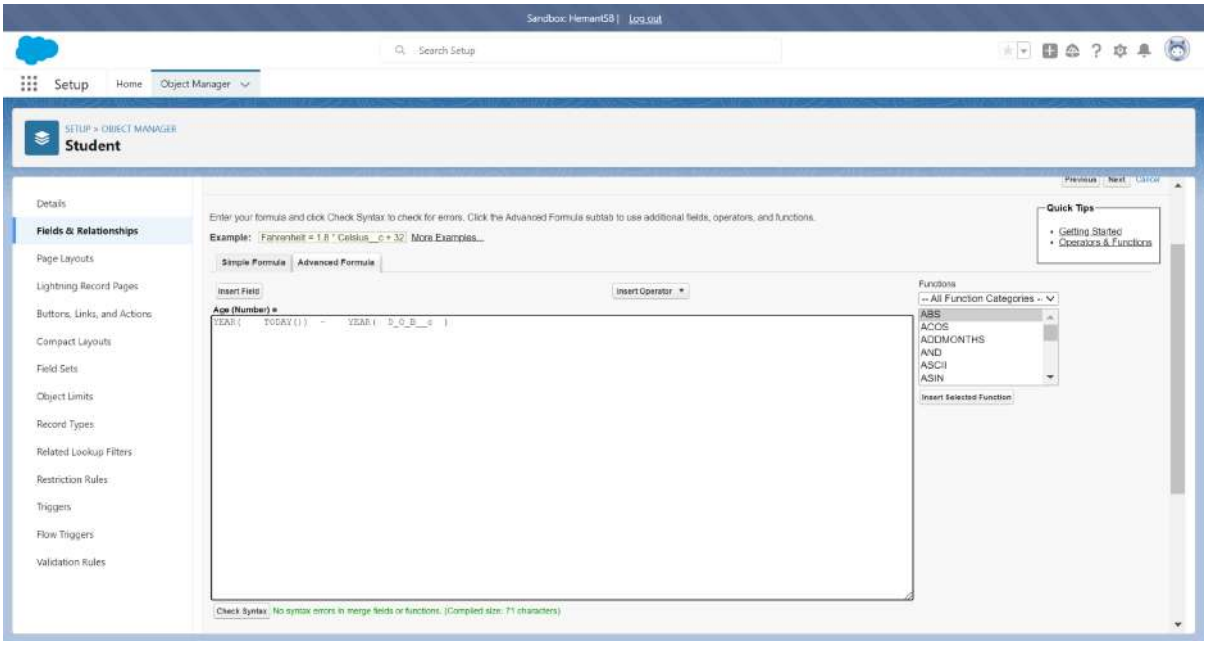
3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Formula** and click on Next .

4. In new Custom Fields fill out the Field Label, Field Name and click **on Formula Return Type**

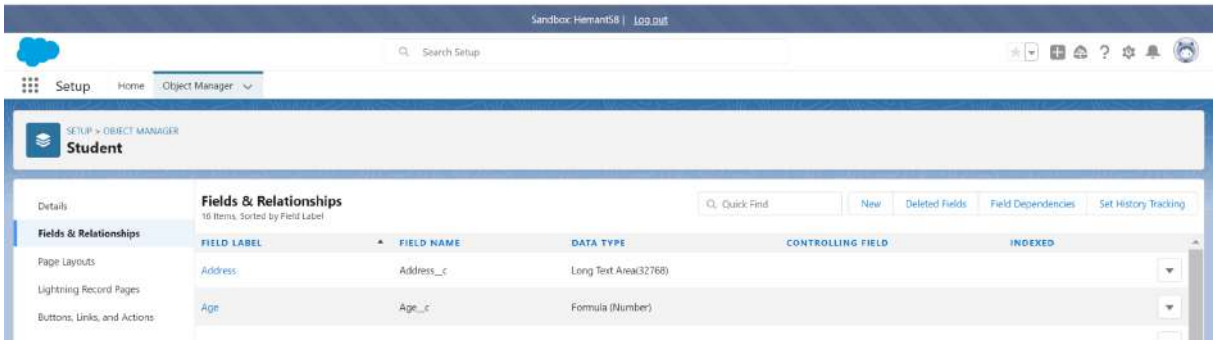


5. Now Select **Text** In Type and click on Next.

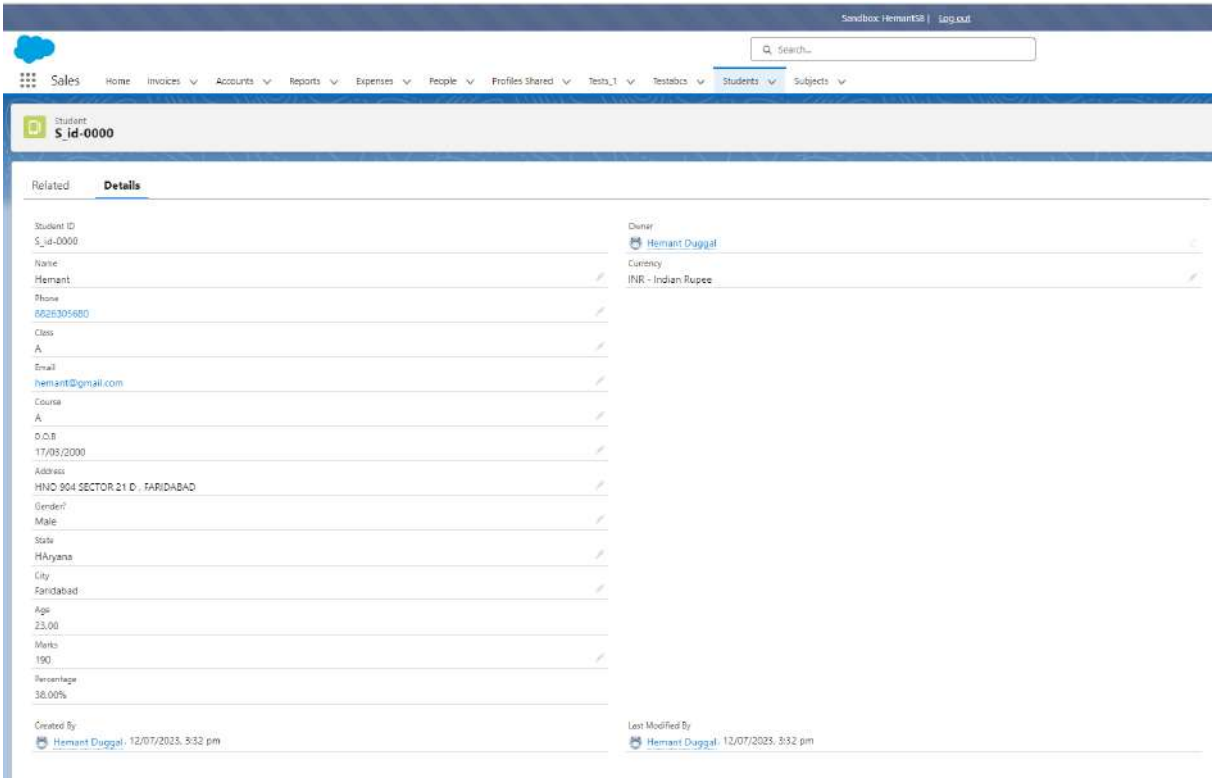
6. Enter This In Your Formula Editor : as—-



5. Click **Next, Next . Then click Save.**



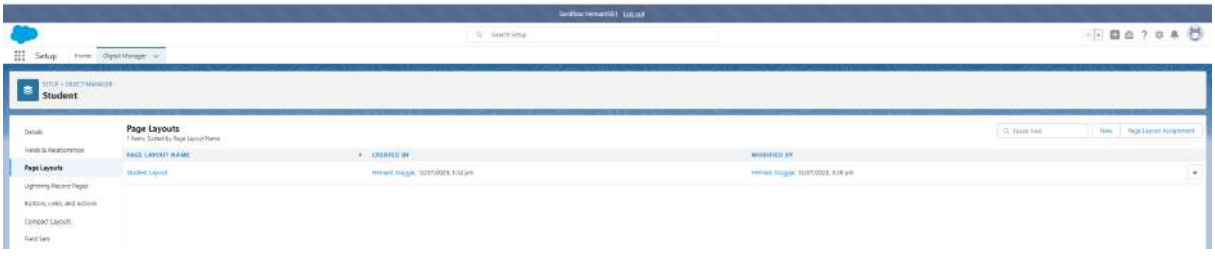
The Output For Above Question Will BE This :



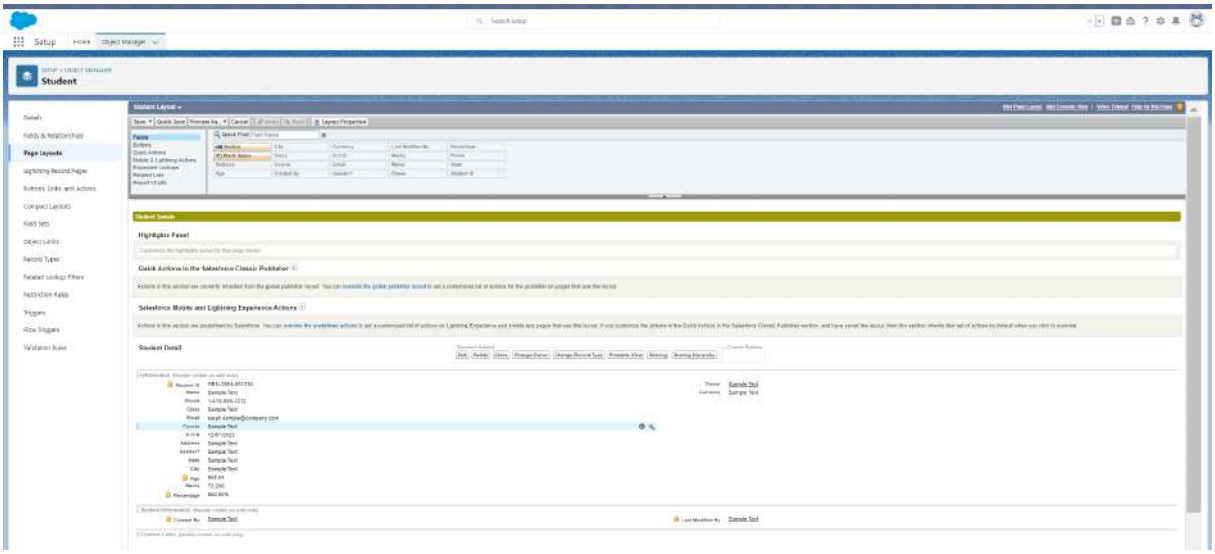
Here We CAn Also Change The Layout With layout Properties

Steps To Change layout :

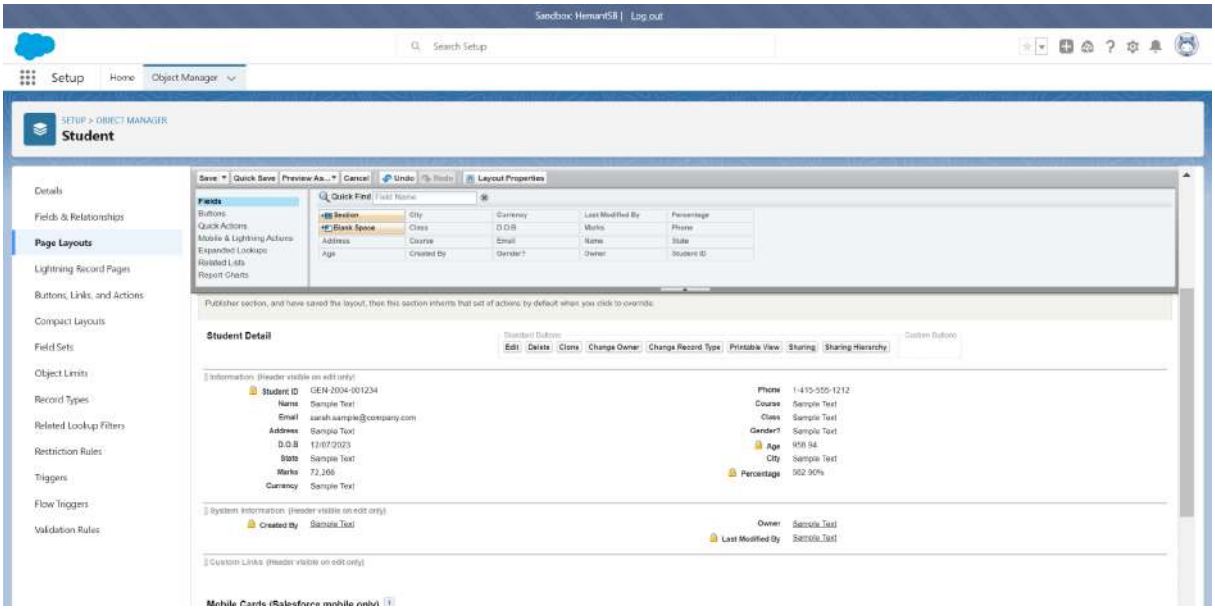
1. Go to Object Manager and select your Object Tap on Page Layout It Will Open Like This :



2. Click On Student Layout It will open Like This :

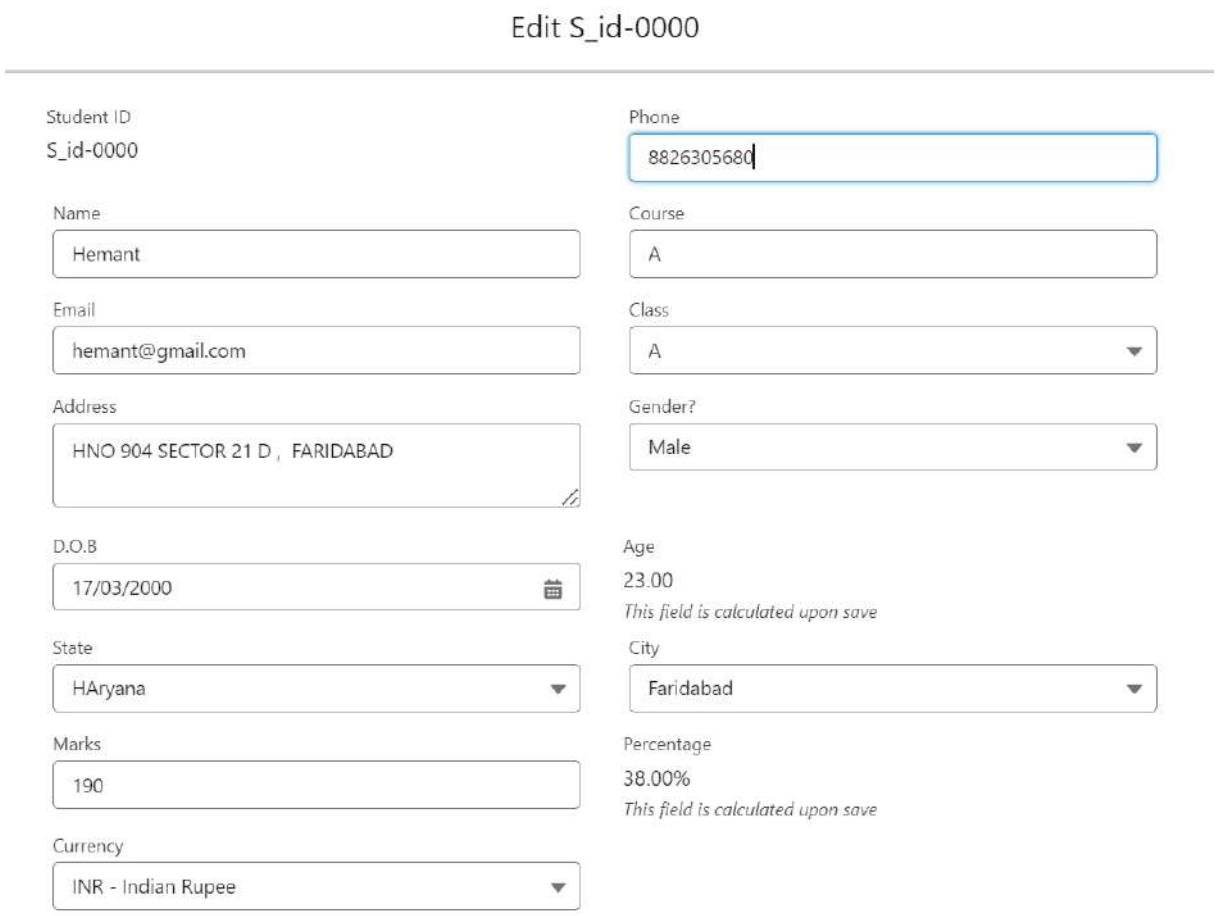


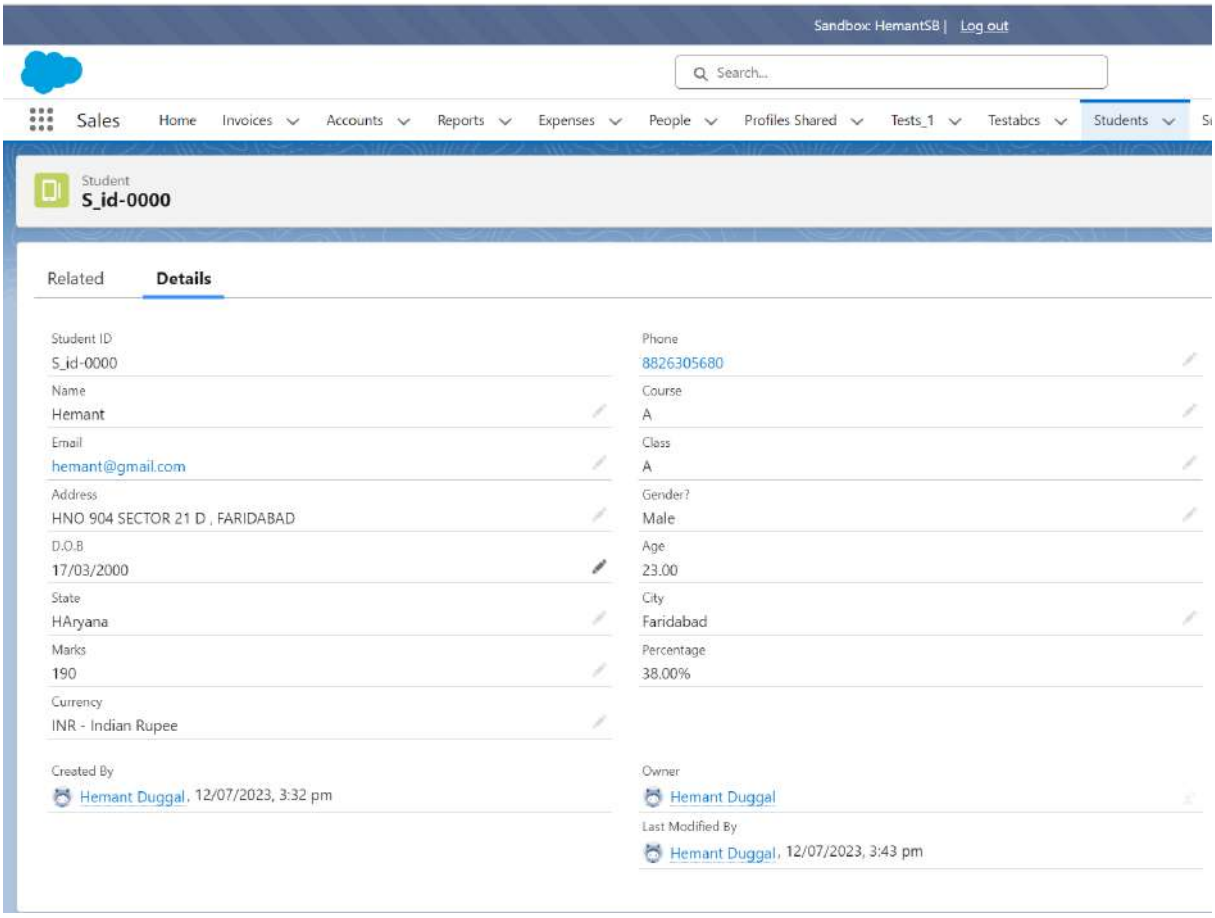
3. Use Drag And Drop Functionality to Change Layout



4. Then **Finally Click On Save**

FINAL OUTPUT OF BOVE EXAMPLE WILL BE :




Sandbox: HemantSB | Log out
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Home
Invoices
Accounts
Reports
Expenses
People
Profiles Shared
Tests_1
Testabcs
Students
Student
S_id-0000
Related
Details
Student ID
S_id-0000
Name
Hemant
Email
hemant@gmail.com
Address
HNO 904 SECTOR 21 D , FARIDABAD
D.O.B
17/03/2000
State
HAryana
Marks
190
Currency
INR - Indian Rupee
Phone
8826305680
Course
A
Class
A
Gender?
Male
Age
23.00
City
Faridabad
Percentage
38.00%
Created By
Hemant Duggal, 12/07/2023, 3:32 pm
Owner
Hemant Duggal
Last Modified By
Hemant Duggal, 12/07/2023, 3:43 pm