

Aim:-

To Create a Salesforce application

### INTRODUCTION:-

The primary function of a Salesforce app is to manage customer data. Salesforce apps provide a simple UI to access customer records stored in objects (tables). Apps also help in establishing relationship between objects by linking fields.

Apps contain a set of related tabs and objects which are visible to the end user. Let's create an app named StudentForce.

Tabs are used to access objects (tables) in the Salesforce application. They appear on top of the screen and are similar to a toolbar. It contains shortcut links to multiple objects. On clicking the object name in a tab, records in that object will be displayed. Tabs also contain links to external web content, custom pages and other URL's.

All applications will have a Home tab by default. Standard tabs such as Accounts, Contacts, Groups, Leads, Profile can be chosen by clicking on '+' in Tab menu.

A profile is a collection of settings and permissions which controls what a user can view, access and modify in Salesforce. Profiles can be defined based on background.

A profile controls user permissions, object permissions, field permissions, API settings, tab settings, Apex Class Access, Visualforce page access, page layouts, records types, login hour and login IP addresses. Similar to tabs, we can use any standard profile or create a custom profile.

Objects, fields and Records are the building blocks of Salesforce. Objects are database tables in Salesforce where data is stored. There are two types of objects in Salesforce:

- **Standard Objects:** The objects provided by Salesforce such as Accounts, Leads, Products, etc. are called Standard Objects.
- **Custom Objects:** The objects created by users are called Custom Objects.

Every how is an object consists of many fields. Thus a record in an object is a combination of related fields. Objects are a collection of records and records are a collection of fields.

Standard fields created for every object by default and custom fields are created by ourselves and these fields are suffixed with 'c' indicating that we can edit and delete those fields. Whereas some standard fields can be edited but not deleted.

Data types controls which type of data can be stored in a field. Fields within a record can have different data types. Eg:

- If it is a phone number field, we can choose Phone.
- If it is a name or a text field, we can choose Date/Time/Text.
- If it is a date/time field, we can choose Date/Time.
- By choosing Picklist as data type for a field, we can write predefined values in that field and create a drop-down.

Data types like Lookup Relationship, Master-Detail Relationship and External Lookup Relationship are used to create relationships between one or more objects.

## PROCEDURE:-

### # Steps to Setup the App

1. Click on Setup button next to app name in top right corner.
2. In the bar which is on the left side, go to Bbuild → Select Create → Select Apps from the drop down menu.
3. Click on New.
4. Choose Custom App.
5. Enter the ~~label~~ App Label. Studentforce is the label of my app. Click on Next.
6. Choose a profile picture for your app. Click Next.
7. Choose the tabs you deem necessary. Click Next.
8. Select the different profiles you want the app to be assigned to. Click Save.

### # Steps to Add Tabs

1. Click on '+' in the tab menu.
2. Click on customize tabs, which is present on the right side.
3. Choose the tabs of your choice and click on Save.

## # Steps to Create Custom Tabs

1. Navigate to Setup → Build → Create → Tabs.
2. Click on New
3. Select the Object name for which you are creating a tab. In this case, it is Students Data. This is a custom object which we have selected.
4. Choose a tab style of your preference and enter its description.
5. Click on Next → Save. The new Students Data Tab will appear as shown below.

## # Steps to Create a Profile:

1. Click on Setup → Administer → Manage Users → Profiles.
2. You can then clone any of the existing profiles by clicking on Edit.

## # Steps to Create Custom Object:

1. Navigate to Setup → Build → Create → Object
2. Click on New Custom Object.
3. Fill in the Object name and Description. As you can see in this case the object name is Students Data.
4. Click on Save.

## # Steps to Add Custom Fields:-

1. Navigate to Setup → Build → Create → Objects.
2. Select the object to which you want to add fields. In my case, it is Students Data.
3. Scroll down to Custom Fields & Relationships for that object and click on New.
4. We need to choose the data type of that particular field and then click Next. I have chosen Text format because we will be storing letters in this field.
5. We will then be prompted to enter the name of the field, maximum length of that field and description.
6. We can also make it an optional/mandatory field and allow/disallow duplicates values for different records by checking on the check boxes.
7. Click on Next.
8. Select the various profiles who can edit that text field at a later point of time. Click Next.
9. Select the page layouts that should include this field.
10. Click Save.

## # Steps to Add a Record:-

1. Go to the Object table from the top menu.  
Students Data is the object to which we will add records.
2. As we can see there are no existing records. Click on New to add new Student Records.
3. Add Student details into different fields. Click on Save.
4. We can create any number of Student Records. We have created 4 Student Records here.
5. In case if we wanted to edit the Student Details,  
~~you~~ we can click on Edit. Yes

Result:-

Thus we have successfully created an application in Salesforce.