

Exp No: 4

Date: 14/08/2024

PUBLIC CLOUD

CREATING AN INSTANCE IN SALESFORCE

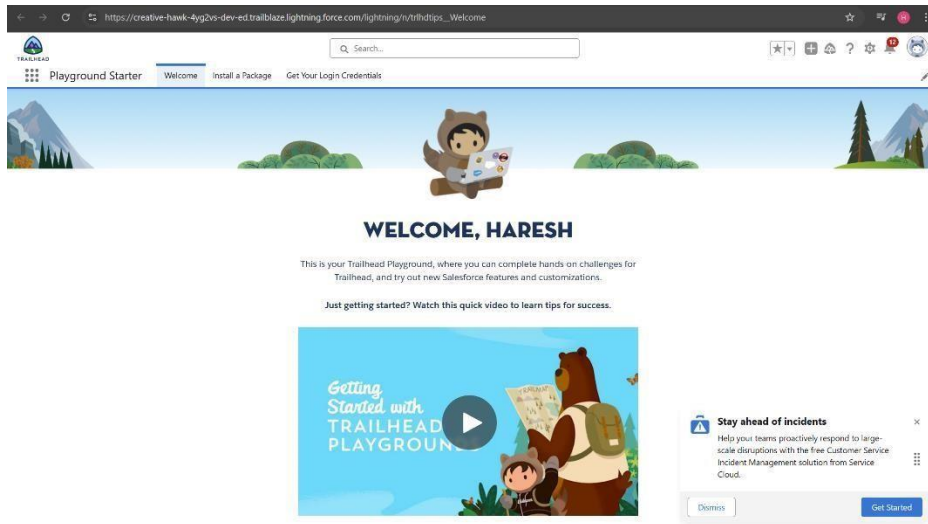
AIM:

Develop a simple application to understand the concept of PAAS using Sales force

PROCEDURE:

1. Log in to your Salesforce account.
2. Click Setup at the upper-right corner.
3. Under the Build section, click Create and select Objects.
4. To create a custom object, click New Custom Object.
5. Enter the name of the Custom Object in Label, Plural Label, and Object Name.
6. Choose the custom apps for which the new Custom tab is required and click Save.
7. Select whether you want to define a custom app or a Salesforce console.
8. Give the app a name and description. An app name can have a maximum of 40 characters, including spaces. Click Save.

OUTPUT:



cloud

Search Setup

Setup Home Object Manager

build

Feature Settings

Service

Field Service

Field Service Mobile

Field Service Mobile App Builder

Objects and Fields

Schema Builder

Process Automation

Process Builder

User Interface

Lightning App Builder

Notification Builder

Custom Notifications

Notification Delivery Settings


Offline

Briefcase Builder

Didn't find what you're looking for?
Try using Global Search.

SETUP Home


Create



Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.


[Get Started](#)



Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

[Learn More](#)



Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

[Get Started](#)

Most Recently Used

1 items

NAME	TYPE	OBJECT
Haresh Moorthy	User	

https://creative-hawk-4yg2vs-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/new

cloud

Search Setup

Setup Home Object Manager

cloud

Search Setup

Setup Home Object Manager

SETUP New Custom Object

Help for this Page

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label

Plural Label

Starts with vowel sound

Example: Account

Example: Accounts

☐

The Object Name is used when referencing the object via the API.

Object Name

Description

Example: Account

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Content Name


--None--

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name

Example: Account Name



SETUP

New Custom Object

New Custom Object

[Help for this Page](#)

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles.

[Tell me more!](#)
[Don't show this message again](#)

Custom Object Definition Edit

Save

Save & New

Cancel

Custom Object Information

Required information

The singular and plural labels are used in tabs, page layouts, and reports.

Label

Account

Example: Account

Plural Label

Accounts

Example: Accounts

Starts with vowel sound

☐

The Object Name is used when referencing the object via the API.

Object Name

Account

Example: Account

Description

For accounts maintaining

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Content Name

--None--

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name

Account Name

Example: Account Name

https://creative-hawk-4yg2vs-dev-ed.trailblaze.lightning.force.com/lightning/setup/CustomTabs/home

Setup Home Object Manager

Search Setup

build

Feature Settings

- Service
 - Field Service
 - Field Service Mobile
 - Field Service Mobile App Builder
- Objects and Fields
 - Schema Builder
- Process Automation
 - Process Builder
- User Interface
 - Lightning App Builder
- Notification Builder
 - Custom Notifications
 - Notification Delivery Settings
- Offline
 - Briefcase Builder

Didn't find what you're looking for? Try using Global Search.

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New What Is This?

No Custom Object Tabs have been defined

Web Tabs

New What Is This?

No Web Tabs have been defined

Visualforce Tabs

New What Is This?

No Visualforce Tabs have been defined

Lightning Component Tabs

New What Is This?

Action	Label	Tab Style	Description
Edit	Get Your Login Credentials	Flag	
Edit	Install a Package	Compass	
Edit	Welcome	Chalkboard	

Lightning Page Tabs

New What Is This?

Setup Home Object Manager

Search Setup

build

Feature Settings

- Service
 - Field Service
 - Field Service Mobile
 - Field Service Mobile App Builder
- Objects and Fields
 - Schema Builder
- Process Automation
 - Process Builder
- User Interface
 - Lightning App Builder
- Notification Builder
 - Custom Notifications
 - Notification Delivery Settings
- Offline
 - Briefcase Builder

Didn't find what you're looking for? Try using Global Search.

New Custom Object Tab

Step 1 of 3

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

New Custom Object Tab

Select an existing custom object or [create a new custom object now](#)

Object: Account

Tab Style: [Select]

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: --None--

Enter a short description.

Description: Custom object tab having account

Next Cancel

Setup

Home

Object Manager

Search Setup

build

Feature Settings

Service

Field Service

Field Service Mobile

Field Service Mobile App Builder

Objects and Fields

Schema Builder

Process Automation

Process Builder

User Interface

Lightning App Builder

Notification Builder

Custom Notifications

Notification Delivery Settings

Offline

Briefcase Builder

Didn't find what you're looking for?

Try using Global Search.

SETUP

Tab

Step 3. Add to Custom Apps

Step 3 of 3

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

Custom App	Include Tab
Platform (standard__Platform)	<input checked="" type="checkbox"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>
Marketing CRM Classic (standard__Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>
Site.com (standard__Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>

Search Setup

New Lightning App

App Details & Branding

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

App Details

App Branding

Org Theme Options

App Launcher Preview

* App Name

Name your app...

* Developer Name

Enter a developer name...

Description

Enter a description...

Image

Upload

Primary Color Hex

Value

#0070D2

☐ Use the app's image and color instead of the org's custom theme

Next

14	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning experience	11/11/2024, 10:56 am	Lightning	✓
15	Marketing CRM Clas...	Marketing	Track sales and marketing efforts with CRM objects.	11/11/2024, 10:56 am	Classic	✓
16	Platform	Platform	The fundamental Lightning Platform	11/11/2024, 10:56 am	Classic	✓
17	Revenue Center	Revenue Center	Get started with your Trailhead Revenue...	11/11/2024, 10:56 am	Lightning (Managed)	✓

← → ↺ https://creative-hawk-4yg2vs-dev-ed.trailblaze.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

Sales Cloud

ADMINISTRATION

Users

Data

Email

PLATFORM TOOLS

Apps

App

App

Connect

External

Lightning

Mobile

Slack

Workflow Services

Heroku

MuleSoft

New Lightning App

App Details & Branding

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

App Details

* App Name 1

Finance

* Developer Name 1

Haresh

Description 1

Finance app

App Branding

Image 1

Upload

Primary Color Hex Value 1

#007002

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next

New Lightning App

App Options

Navigation and Form Factor 1

* Navigation Style

☒ Standard navigation

☐ Console navigation

* Supported Form Factors

☒ Desktop and phone

☐ Desktop

☐ Phone

Setup and Personalization 1

Setup Experience

☒ Setup (full set of Setup options)

☐ Service Setup

App Personalization Settings

☐ Disable end user personalization of nav items in this app

☐ Disable temporary tabs for items outside of this app

☐ Use Omni-Channel sidebar

Back

Next

14 Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning Experience 11/11/2024, 10:56 am Lightning ✓

15 Marketing CRM Clas... Marketing Track sales and marketing efforts with CRM objects. 11/11/2024, 10:56 am Classic ✓

16 Platform Platform The fundamental Lightning Platform 11/11/2024, 10:56 am Classic ✓

17 Playground Chatter Playground Chatter Get started with your Trailhead Playground 11/11/2024, 10:56 am Lightning (Managed) ✓

https://creative-hawk-4yg2vs-dev-ed.trailblaze.lightning.force.com/lightning/setup/NavigationMenus/home

Setup Home Object Manager

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

- > Apps
 - App Manager
 - AppExchange Marketplace
 - > Connected Apps
 - > External Client Apps
 - > Lightning Bolt
 - Flow Category
 - Lightning Bolt Solutions
 - > Mobile Apps
 - > Salesforce
 - > Packaging
 - > Feature Settings
 - > Slack
 - > Workflow Services
 - > Heroku
 - > MuleSoft

Lightning Experience App Manager

29 Items • Sorted by App Name • Filtered by All appmenutems - TabSet Type, App Type

App Name	Developer Name	Description	Last Modified	App Type	Vi...
Ant Migration Tool	Forcecom_Migration_Tool	The Force.com Migration Tool is a Java/Ant-based command-line utility...	11/11/2024, 10:56 am	Connected (Managed)	
App Launcher	AppLauncher	App Launcher tabs	11/11/2024, 10:56 am	Classic	✓
Automation	FlowsApp	Automate business processes and repetitive tasks.	11/11/2024, 10:59 am	Lightning	✓
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	11/11/2024, 10:56 am	Lightning	✓
Community	Community	Salesforce CRM Communities	11/11/2024, 10:56 am	Classic	✓
Content	Content	Salesforce CRM Content	11/11/2024, 10:56 am	Classic	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	11/11/2024, 10:56 am	Lightning	✓
Dataloader Bulk	Dataloader_Bulk	The Data Loader is an easy to use graphical tool that helps you to get y...	11/11/2024, 10:56 am	Connected (Managed)	
Dataloader Partner	Dataloader_Partner	The Data Loader is an easy to use graphical tool that helps you to get y...	11/11/2024, 10:56 am	Connected (Managed)	
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	11/11/2024, 10:56 am	Lightning	✓
Finance	Haresh	Finance app	11/11/2024, 11:43 am	Lightning	✓
Force.com IDE	Forcecom_IDE	The Force.com IDE is a powerful client application for creating, modify...	11/11/2024, 10:56 am	Connected (Managed)	
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	11/11/2024, 10:56 am	Lightning	✓
Marketing CRM Clas...	Marketing	Track sales and marketing efforts with CRM objects.	11/11/2024, 10:56 am	Classic	✓
Platform	Platform	The fundamental Lightning Platform	11/11/2024, 10:56 am	Classic	✓
Playground Starter	Playground_Starter	Get started with your Trailhead Playground.	11/11/2024, 10:56 am	Lightning (Managed)	✓

RESULT:

A simple application to understand the concept of PAAS is successfully created using Sales force.