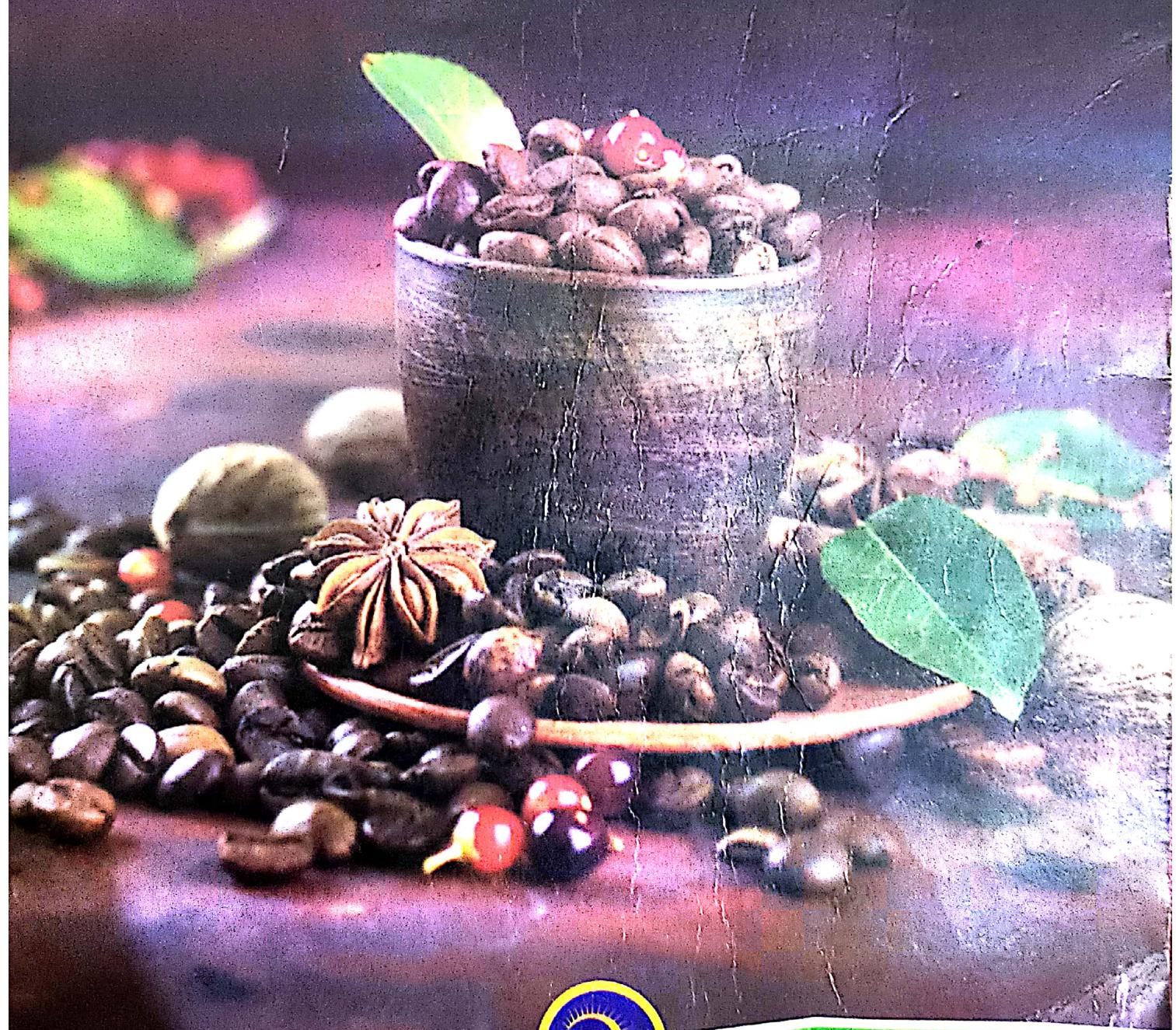


**RAFALE**

*Always Seek Knowledge*



**A4 EX.-BOOK**



Scanned with OKEN Scanner

उत्तरी Finance वाले लोग ure का सलफर्सेज़, Mail ID, CRM, Cromg

### Marketing

जून Cromg में लोगों द्वारा पुछताहो है कि credit लेने के बाये Bajaj वाले लोग तो तो marketing.

### Sale

आपके पास का यो credit कोड बदली करना. Emi, offer वही होते sale वाले लोग.

### Service

आपके payment आई उत्तरी problem solve करके उत्तरी द्वारा देखते service. वाले लोग.

# Data Modeling (Object Creation)

① What are the objects in Salesforce?

Object - It is collection of records and fields.

- ① Every database has tables to store data.
  - ② So, in Salesforce Object means table.
  - ③ Tables are collections of columns and rows.  
Table Name = form Header

- d There columns are called fields. (Fields for collecting data).  
These fields are appropriate for ADD (i.e. date, Name, DOB etc.)

e Row is called Record or Records (Records for collecting preferences).  
This row is appropriate for User info. (Name, DOB, etc.)

f Type of object:  
The two types of objects are:  
I Standard Objects: Me can apply standard objects.  
II Custom Objects.  
III External Objects.

- f) All objects are divisible under An application.

- ① Tabs are UI (User Interface) between Application & objects.

- (2) Cm-tower Qf each page + 10% of the total marks

- ① 3000 custom objects

- ④ Me een aantal verschillende catagorien

- mot ③ 50 - 80% ~~gęska~~ konotowęga nos ob nos gęska ④

- ④ Errentier o

- ⑤ professional pushes to do what you like

- ④ Enterprise 200 calls can be made through Call Center.

- Universität für Performance - 2,000.000,- Euro bis 2018

- ③ Developers, 400.

## (not for board) notes on standard objects

Q 2 What is the difference between standard object and custom objects?

→ standard objects

- 1 Standard objects are created by Salesforce.
- 2 Standard objects do not contain '-' in API Name.
- 3 Standard objects have so many standard fields.
- 4 We can not delete standard objects.
- 5 We can not do configuration changes in standard objects.
- 6 We can not delete tabs on standard objects.
- 7 We can not create new standard objects.
- 8 We can change standard object tab name.

Custom Objects

- 1 Custom objects are which are we can create as per business needs (called custom objects).
- 2 Custom objects have '-' in API Name.
- 3 Custom objects have 4 standard fields only i.e. owner, created by, modified by & Name.
- 4 We can delete custom objects.
- 5 We can do configuration changes in custom objects.
- 6 We can delete tab of custom objects.
- 7 We can create many custom objects.
- 8 We can change name of custom objects.

3) Steps to create an object in SFDC using classic view  
 → classic 8-

By going to the setup, then build and expand the create section, In create section there is an option of Object from that Object option we can create object. (i.e. New custom object).

Setup

→ Build

→ Create

dot go small → Object

→ New custom object.

4) steps to create an object in SFDC using Lightning View.

Lightning 8

By going to setup, then we have to go to search bar and typed object manager.

After clicking on object manager, we have

to click on create button, from that we

have to click on new custom object

button to the new custom object.

⑤ What is the difference between Label and plural Label in SFDC ?.



Label is a unique name of object.

eg. Account, Contact, Opportunity, etc.

- Label represents object names in UI.

- It can be used to create objects.

plural label

list

records

- plural label represents Name of tab.

the field which is used to display the list of records.

⑥ Can we user spacer while giving Object Name field (while creating ~~field~~ an object).

→ ~~Yes~~ <sup>Not</sup> we can give spacer while creating an object in object Name.

⑦

What is meaning of Description ?.

→ Description represents Information of object.

⑧

What is meaning of Allow Reports ?.

→ ~~Allow Reports~~ this checkbox represent whether the object we can use it or not while creating object.

(9) What is the use of context-sensitive Help setting?

→ provides help cards with problem block short

get Context-Sensitive Help setting -> settings

get all related objects block and its problems

- Means if we need help about that page then we can redirect on URL.

→ methods in block to run get it forth

for providing information to our user based on the context of the task in which they are involved.

requires - context

(10) Which data type we can use for the field, created while creating an object?

→ Text data type. and Auto increment + It

(11) What are the API names of the fields which getting creating along with the object?

→ for do not use any native API name who

can affect on write from object

(12) What is the use of Allow Activiti?

→ Allow Activiti is the checkbox representable whether we can create activiti by that object or not.

E.g. Email sending, task performance

and many more not be able in mongo with this

from object in mongo with this

(13) What is the use of Track field History.

→ Track field History this check box represent whether we can track the history of the data in any field which belongs to the object.

(14) What is the use of Allow in chatter.

→ Allow in chatter group checkbox represent whether we can send message or not in chatter group.

(15) What is Allow search.

→ It represents whether we can search records of the object or not.

(16) Which user can see an object when Deployment status is Pre Object Status.

→ Only System Administrator can see the object when deployment status is in deployment.

(17) Which user can see an object when Deployment status is Pre Deployed.

→ When this option is selected then all user can see the object in deployment.

(18) In which section of setup (classic view) we can see standard objects.



By going to setup → Then build → Then expand the ~~edit~~ customize section → Where we can see standard objects. i.e. setup → build → customize.

(19) How to identify whether an object is standard or custom.



Standard object → does not contain ~~standard~~ API Name. If have so many fields.

Custom object → contains ~~standard~~ API Name.

If have 4 standard fields, i.e. Owner, Created By, Modified By, Modified Date.

(20) Which objects you can see in Sales, Service & marketing cloud.



We can see only standard objects in Sales, Service & marketing cloud. → Account, Lead, Opportunity, Contact.



(21) Explain Lead, Account, opportunity, contact.

Lead & mean people who are interested in your product and service. of potential customer.

Account & mean company that you're doing business with it.

22 (2) Contact & means to the people who work for them.  
8 100% of business

Opportunity & means goals in progress of  
and our strength & no opportunity record to track details  
about details including which type  
of account they got.

Business is 100% profit of what (el)  
& means

(22) What are stages of Opportunity? business  
Stages of opportunity

① prospecting.

② qualification, analysis & help making

③ Need Analysis.

④ value proposition.

⑤ Identify Decisionmaker.

⑥ perception Analyst

⑦ proposal / price quote.

⑧ Negotiation.

⑨ closed won.

⑩ closed lost.



# Data Modeling (Tab)



→ How Many Ways We can create a Tab.

- There are 2 ways we can create a tab.

- Way ① While creating custom object there is 1st option launch new tab wizard from that we can create tabs. , or else
- Way ② If we have forgot mistakenly by pass that , then we can create New tab by going to setup, then Builders Hande Expand & then Create section. In creation Section there is option tab from that tab option we can create Tab.

By 1<sup>st</sup> Way

Setup → Objects → DPT → Create

Objects → DPT → New custom object → Information of custom object → click optional feature.

② Select Deployment status.

③ Search status.

④ Object creation options.

① Add Notes related to tab.

② Launch New custom tab.

\* Mandatory fields

When you create tab by creation of custom object.

Then Save it.

Second Window or step ① if fi → DPT

+ Mappings

① Select Object

DPT Fields ② \* Mandatory fields.

② Tab by style which you want.

Setup ③

step ④ of 90

Add profile which you want.

Add custom app when you click app display.



## (dot) problem ptpt

Then save it you create a custom tab.

dot is stored and will appear when  
By 2<sup>nd</sup> Way ↘

dot stored and we make a click on object

↳ Builder mode creates interface objects (① point)

↳ Create dot (Custom Tab)

Tab ↗ .edot

and right clicking on the tab → click on custom object tab (② point)

object at step ③ dot work. Object (show object name)

if you not created object at step ③ \* Mandatory fields → tab style (Tab)

object dot work many dot noitgo if choose tab style which you want

dot stores and save

③

② Can we create Tab for standard Objects.



No. We cannot create tab for standard object

→ also radius do not because Salesforce already provided tab for S.O.

Note:- ① Only one object have one tab.

③ Can we create multiple tabs for a single object?

→ No. (①)

No. (①)

④ What are of the tab in SFDC.



Tab & It is virtual representation of object name on

UI field (①)

practically to

There are 3 types of tabs (①)

① Custom Tab. ② Standard Tab

of tabs. (②)

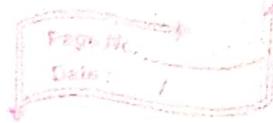
Web Tab.

Theoretically,

Voiceforce Tab

HTML.





① Custom Object Tab - i.e. allow you to find, add,

edit, change and delete the data in your custom object.

② Web Tab - i.e. allow you to display any web application or website within a Salesforce app.

③ Virtualforce Page Tab - i.e. allow you to display data from a virtualforce page tab.

④ How to create a tab in Salesforce lightning?

→ By 1<sup>st</sup> way & At the time of creating a Object, you don't know & don't know it will created a tab or not.

Setup

Object Manager

don't bookmark

Expand the create & select custom object.

→ ① fill all information of custom object

like name, label, plural label etc.

② Select option features which you want.

③ Select search after to allow search the custom tab.

→ Object Creation Options

\* Mandatory: Select checkbox of Launch New custom tab

① Object Automatically Selected.

\* mandatory ② Tab Style which you wanted.

Now set tab style → Next → Add profile → Custom App

Set radius for tab → Save & Assign → Done.

There is no creation tab when object creation.

Final steps: ⑧ Strong ⑨ Fresh policy ⑩ done





tab, half of your work will be done for us method (1) or of tab By 2<sup>nd</sup> way. When you forget a tab creation, it will do creation at the time of object creation.

Setup

Quick find

Box search

Type Tab

New

Setup

quick find, box search tab is - dpt dpt

smoothly

Select this tab option under the user interface.

↳ Open New window custom tab click [New] button

New

\* Mandatory.

↳ select Tab style

① Add profile.

② Custom App Visibility.

7

What is difference between standard Tab & custom Tab.

Standard Tab:

① User cannot create standard tabs.

② Standard tabs are provided by salesforce.

③ Standard tabs cannot be deleted.

④ In standard tabs you can't rename tab & label.

⑤ Standard tabs do not contain '-' in API Name.

⑥ Standard tabs you can't add field.

e.g.: Account, contacts, lead.

Custom Tab: (1)

① Custom tabs are created as per business needs.

② Custom tabs can be deleted by user.

③ Any modification can be done by custom tab.

④ Custom tabs contain '-' in API Name e.g.: rename, delete.

e.g. Central Bank App.

① Digital banking ② Deposite. ③ Retail loan.



Q - What happens if you forget to tab creation?

en you forget a tab creation,  
the time of object creation.

Search tab: → DPT tab (1)

option under the user interface.

Window custom tab click [New] button

Q - After creating object (2)

Select object in list

Select Tab style

1) Add profile.

2) Custom App Visibility (3)

→ If we click on down arrow

ween standard Tab & custom tab.

→ Click on

Standard tab.

Owned by Salesforce.

not be deleted.

Want to rename tab & label.

contains '---' in API Name.

Add field.

Account, Contact, Lead.

①

For permission needs by user.

Deleted by user.

done in custom tab.

API Name: e.g. rename, delete.

② Related to.

Q - Can we delete custom tabs after tab creation? (11)

→ Yes, we can delete it.

→ Standard tabs can't be deleted.

Q - Can we delete standard tabs?

→ No, we cannot delete it but you can be able to delete fields.

Q - Can we change the tab name of the tab after tab creation.

→ Yes, we can do it. By 2 ways.

→ By 1st way → Go to Setup → Object Manager → Tabs

→ By 2nd way → Go to Setup → Object Manager → Tabs

→ Click on Create

→ Select the objects which you want

→ Give new tab name.

→ Click on Save.

→ By 2nd way → Go to Setup → Object Manager → Tabs

→ Click on Customize

→ Tab Name or Label.

→ Rename it.

→ Change singular.

→ Plural name.



11 What is tab style? →

Tab style is It is visual representation which is of tabs to identify easily, handy in selection of tabs, also to select particular tab.

- Tab style is mandatory → Tab style does not have any properties →

Field id is from security perspective →

- Without tab style → Tab style applied only custom tabs →

you can't able create tabs →

12 Can we see the already tab created object name in the object list while creating a tab? →

No,

13 Can we create a tab without giving tab style →

→ No, tab style is a mandatory field.

14 Can we access any object without creating a tab? →

Yes →

Added by removing tab →

→ remove tab →

→ delegate object →

→ same thing →

## (299A) How to add any tab on Tab Bar in classic & lightning?

→ How to add any tab on Tab Bar in classic & lightning?

① Classic: It is called as IP TI - not available.

Available on screen at top right icon.

Go to Tab Bar.

→ There is '+' button click on it.

→ Open All Tabs window.

→ Then Right side Here scroll down  
(Customize my tabs click on it.)

→ store Available tabs.

→ select which you want..

→ save it.

method available present

store ↪

You can add tab on Tab Bar with help of customize my tabs.

② Lightning

By going to setup (qqA) brief steps done are →

→ Search App Manager way ↪

→ Click App. In there in dropdown arrow next to the app.

→ Click edit A shows of with (8)

(App setting) symbol ① ↪

Available item.

Then select tab which is available item.

→ ↪

Add [+] New item click on it.

→ Select this option ↪ save it.

→ done ↪

. qqA method P.M. If done and very

# Data Modeling (Appr).



① What are the Apps in the Salesforce?

→ Application - It is a collection of tabs that work together to serve a particular function.

② Where we can see these Apps in Salesforce.

→ Setup → Customize → App

① Classic route

→ Setup → Tools

→ Builder

→ Create

② By going to Sales, Right click

These are dropdown buttons

Where you can see the Apps.

② Lightning

Setup

→ Search quick find (App manager)

→ you can see all the Apps in Salesforce.

③ How to create Apps in SFDC?

→ ① Classic (Setup → App)

Setup

→ Builder → New → Custom App

→ Create

→ If no tabs create → App [New] ① select type ② custom App.

③ stop enter details ④ Parent Manager

⑤ choose tab ⑥ Action profiles

Save

You can save it as a custom App.



Scanned with OKEN Scanner

② Lightning → It is range skip old add

Setup → To manage app add new

↳ APP Manager (quick find)

↳ NEW lightning App ① App Details f

fill name & desc app id

② App Options. will

e.g. Name type (standard/Custom)

③ choose tab.

if select right app profile

then dot stands for both org & dev

④ What are two types of App in SFDC

→ two way of app nos dev id or std

① custom App.

② Standard App.

③ Configuration → not under a specific Salesforce UI

→ If application are intended to

enhance productivity by allowing everything

to be done from a single, tabbed, screen.

and dot of UI

⑤ What is the difference between App Label and App Name?

→ App Label → It will represent application on UI

if no App Label → It will represent application on UI

OR

If no UI for application will be displayed to the

user who is not aware on UI with app Label.

→ .dot

App Label → This is a actual Name of the application

if application will be referred programmatically

using App Name. i.e. API Name of it

(6) Can we give spaces in a Tab Name.

→ Yes, We can give spaces in a tab Name.

(7) How to add tabs in the app while creating any App.

→ If you are creating a app then there is the 3rd step that is choose Tab i.e. mean to add tabs to your app.

Available tabs you can add in your app.

.qqa root32

.qqa backroot3

(8) How to add tabs in the app after creating any app.

→ ① To add tabs there are 2 ways

→ Go to tab bar.

→ Then there is + button click on it.

→ Open All Tab Window

→ Then there is right side option i.e.

→ Click on it.

→ Then they show Available Tab.

→ Then you can add it on

→ Save it.

This applied on both classic & lightning.

② 1st Way: Add tab to app

When creating a custom tab then in 3rd step.

Add custom tab in app then you can include tab option a specific tab of specific app only.

③ Lightning more dot and square of melt

Setup gear

↳ setup

↳ search quick find in App Manager

↳ select the App Name you want to add.

↳ this app Name on right side drop down menu click on it.

→ click on edit.

→ tabs ↪

↳ choose Tab in Available

Tab of add it.

→ tabs ↪

→ favortes menu ↪

→ Save it.

Q) What is the meaning of Default Landing Tab in Salesforce?

→ Default Landing tab means whenever user open a need app then open default tab are

Find this dot in estimate's open it ↪

not go exit when you switch to classic into

classic no way first time ↪ lightning then only default landing tab pr Home open.

(10) Name of the Standard App given by SFDC?



- ① Marketing
- ② Sales
- ③ Service
- ④ Content
- ⑤ Platform
- ⑥ Community

(11)

How to remove any tab from an app?



There are 2 ways

① Classic

1st way

Setup

Builder

Create tab

App click

edit

Then select tab

Then remove it.

② 2nd way

Tab bar

Customize my tab

choose option

Select list you can remove

Save it

### ③ Lightning → How to install & enable & disable

Setup Gear → Installation & Configuration

→ setup → search quickfind in App Manager

→ Select the App Name you want to remove

→ Then thin app name right side tab, name.

→ choose edit option.

→ choose tab on selected tab

→ select if you want to remove it.

→ Save it.

→ Now click on start → install button

→ How many custom application we can build?

→ Depends upon the type of edition we have.

→ Click on more.

→ **i** Unlimited → Unlimited apps.

→ **ii** Enterprise → 10 apps.

→ **iii** Developer → 10 apps.

→ **iv** Professional → 5 apps.

→ **v** Standard →

→ **vi** Unlimited pro →

→ **vii** Group →

→ Now click on start → install button

→ Now click on start → install button