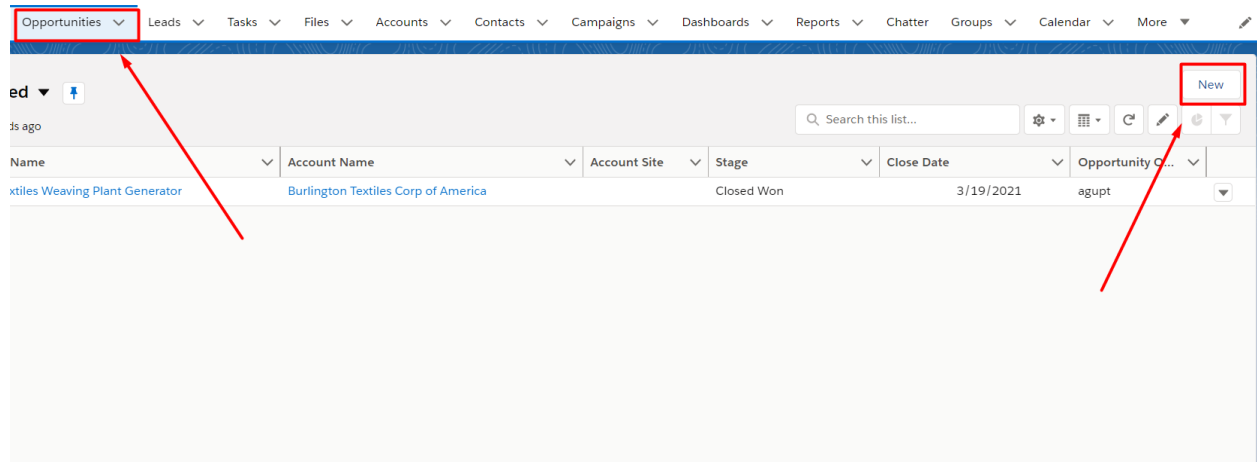


Lecture 4: Creating a Record.

In this lecture, we will understand how to create records in salesforce.


Step 1: As you click on the Opportunities tab on the top right corner of the screen you will see an option 'New'



Step 2: As you click on the new button you will be directed to the next page "Opportunity information" where you will see some blank fields such as account name, opportunity name, type, lead source, etc which are to be filled in order to create a record.


A screenshot of the 'Opportunity information' form in Salesforce. The form is divided into several sections. The top section includes 'Opportunity Owner' (astha gupta), a 'Private' checkbox, and a red box containing the following fields: '* Opportunity Name', 'Account Name' (with a search bar), 'Type' (dropdown menu), and 'Lead Source' (dropdown menu). Below this is the 'Additional Information' section, which contains two red boxes. The first box contains 'Order Number' and 'Current Generator(s)' fields. The second box contains 'Main Competitor(s)' and 'Delivery/Installation Status' (dropdown menu) fields. At the bottom of the form, there is a 'Tracking Number' field and three buttons: 'Cancel', 'Save & New', and 'Save'.

Step 3: As you go through the fields you will notice that the fields like closed date, opportunity name, and stage are denoted with an asterisk which means these are mandatory fields.

Opportunity Owner 	Amount <input type="text"/>
Private <input type="checkbox"/>	* Close Date <input type="text"/>
* Opportunity Name <input type="text"/>	Next Step <input type="text"/>
Account Name <input type="text" value="Search Accounts..."/>	* Stage <input type="text" value="--None--"/>
Type <input type="text" value="--None--"/>	Probability (%) <input type="text"/>
Lead Source <input type="text" value="--None--"/>	Primary Campaign Source <input type="text" value="Search Campaigns..."/>

Step 4: Once you have filled the fields of opportunity name, close date and stage click on the button save.

Opportunity Information

Opportunity Owner 	Amount <input type="text"/>
Private <input type="checkbox"/>	* Close Date <input type="text" value="5/4/2021"/>
* Opportunity Name <input type="text" value="Test 1"/>	Next Step <input type="text"/>
Account Name <input type="text" value="Search Accounts..."/>	* Stage <input type="text" value="Prospecting"/>
Type <input type="text" value="--None--"/>	Probability (%) <input type="text" value="10%"/>
Lead Source <input type="text" value="--None--"/>	Primary Campaign Source <input type="text" value="Search Campaigns..."/>

Additional Information

Order Number <input type="text"/>	Main Competitor(s) <input type="text"/>
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Current Generator(s)

Step 5: As you save it you will be directed to the next page and you will be able to see the record that you created.

Opportunity
Test 1

Account Name Close Date 5/4/2021 Amount Opportunity Owner [astha gupta](#)

Prospecting Qualification Needs Analysis Value Proposition Id. Decision Ma... Perception Anal... Proposal/Price ...

Activity Details Chatter

New Task Log a Call New Event Email

Step 6: In order to see the values which you provided in the fields you have to click on the Details option and all the values provided will be reflected here.

Activity **Details** Chatter

Opportunity Owner	Amount
astha gupta	
Private	Expected Revenue
<input type="checkbox"/>	
Opportunity Name	Close Date
Test 1	5/4/2021
Account Name	Next Step
Type	Stage
	Prospecting
Lead Source	Probability (%)
	10%
	Primary Campaign Source
Order Number	Main Competitor(s)
Current Generator(s)	Delivery/Installation Status

Step 7: As you click on the opportunity tab, you will be able to see all the recently Viewed records.

The screenshot shows the Salesforce interface with the 'Opportunities' tab selected. The 'Recently Viewed' section displays a list of two items. A red box highlights the table containing the following data:

	<input type="checkbox"/> Opportunity Name	<input type="checkbox"/> Account Name	<input type="checkbox"/> Account Site
1	<input type="checkbox"/> Test 1		
2	<input type="checkbox"/> Burlington Textiles Weaving Plant Generator	Burlington Textiles Corp of America	

Step 8: In order to see all opportunities you just have to click on the recently viewed tab and select "All Opportunities". you can also view your records according to various weeks and months.

The screenshot shows the 'Recently Viewed' dropdown menu in the Salesforce interface. A red box highlights the 'Recently Viewed' tab, and a red arrow points to the 'All Opportunities' option in the 'RECENT LIST VIEWS' section. The dropdown menu includes the following options:

- RECENT LIST VIEWS
 - ☐ All Opportunities
 - ☒ Recently Viewed (Pinned list)
- ALL OTHER LISTS
 - Closing Next Month
 - Closing This Month
 - My Opportunities
 - New Last Week
 - New This Week