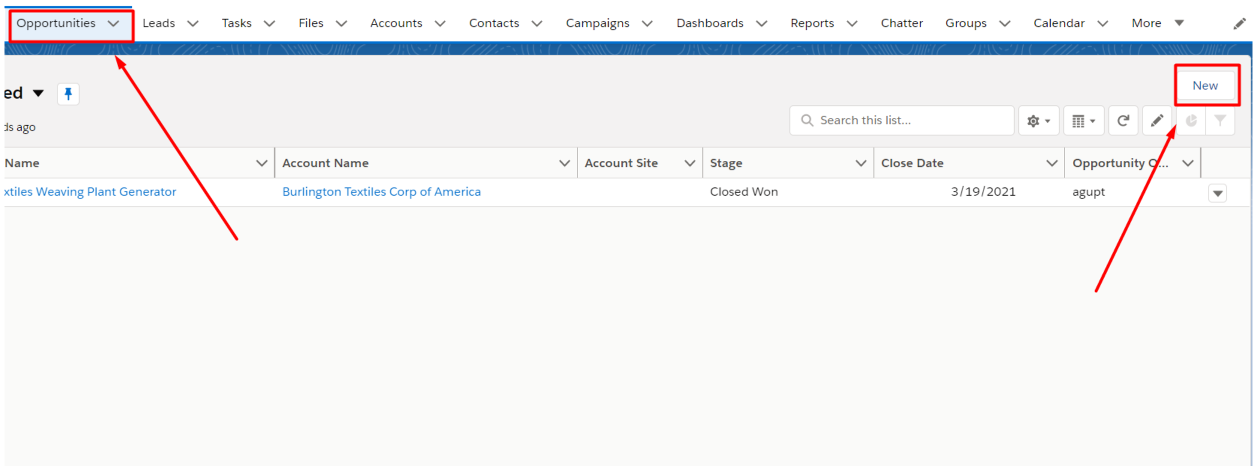
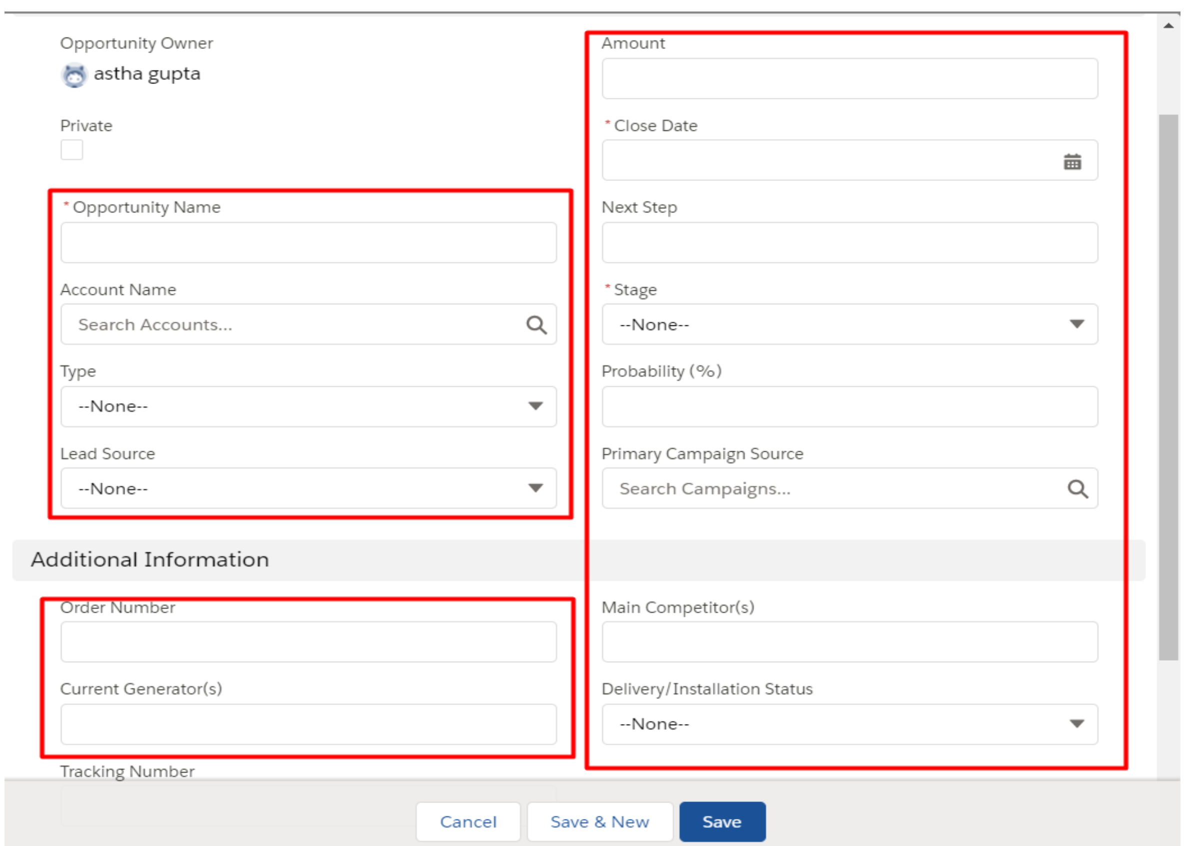
Lecture 4: Creating a Record.

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

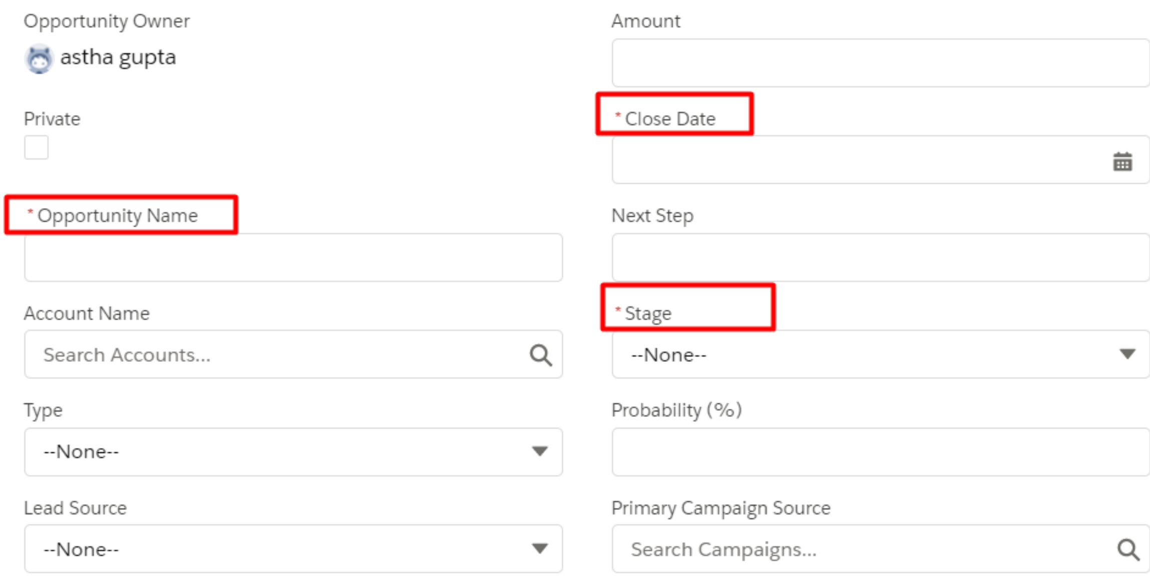
Step 1: As you click on the Opportunities tab on the top right corner of the screen you will see an option 'New'



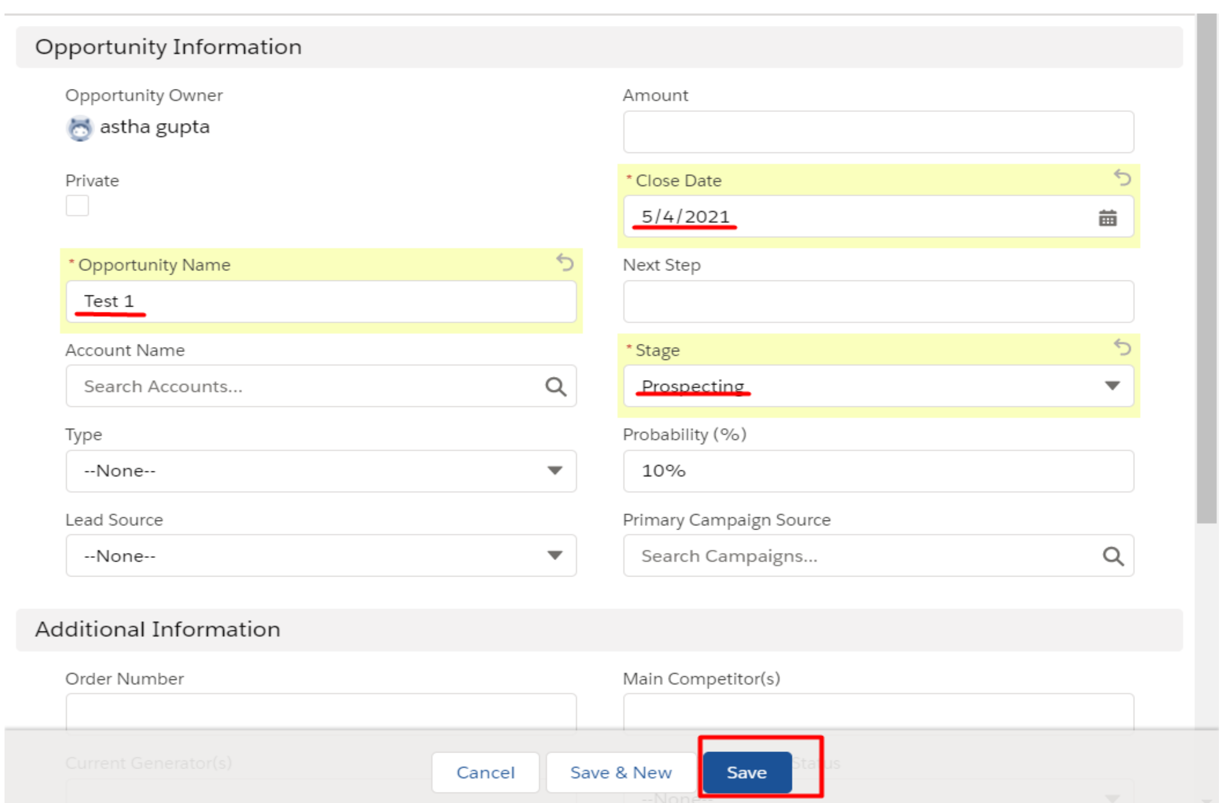
Step 2: As you click on the new button you will be directed to the next page "Opportunity information" where you will see some blank fields such as account name, opportunity name, type, lead source, etc which are to be filled in order to create a record.



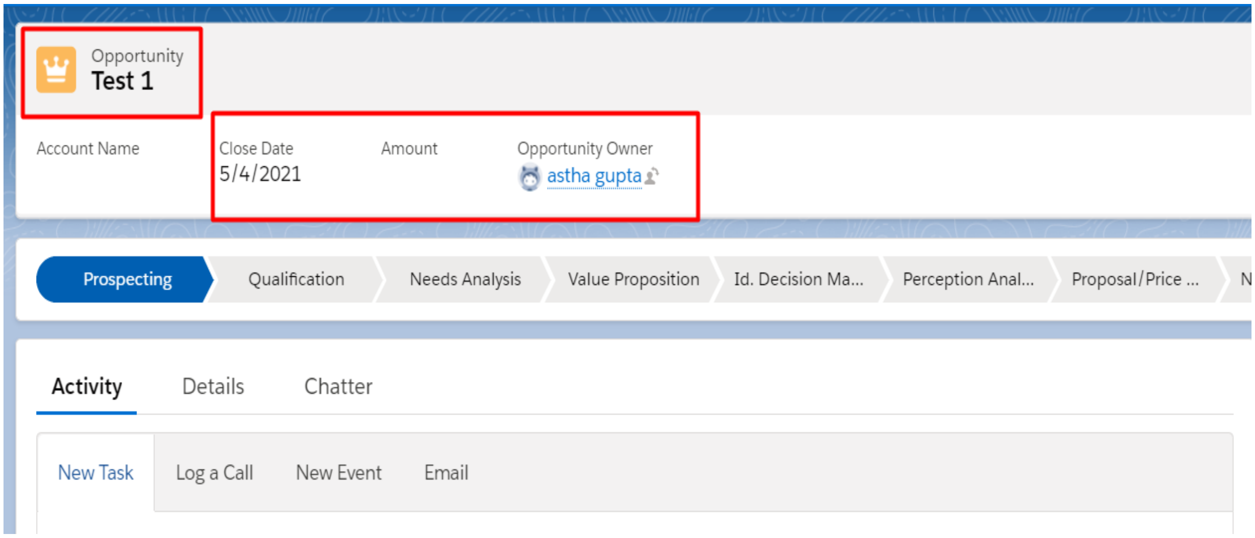
Step 3: As you go through the fields you will notice that the fields like closed date, opportunity name, and stage are denoted with an asterisk which means these are mandatory fields.



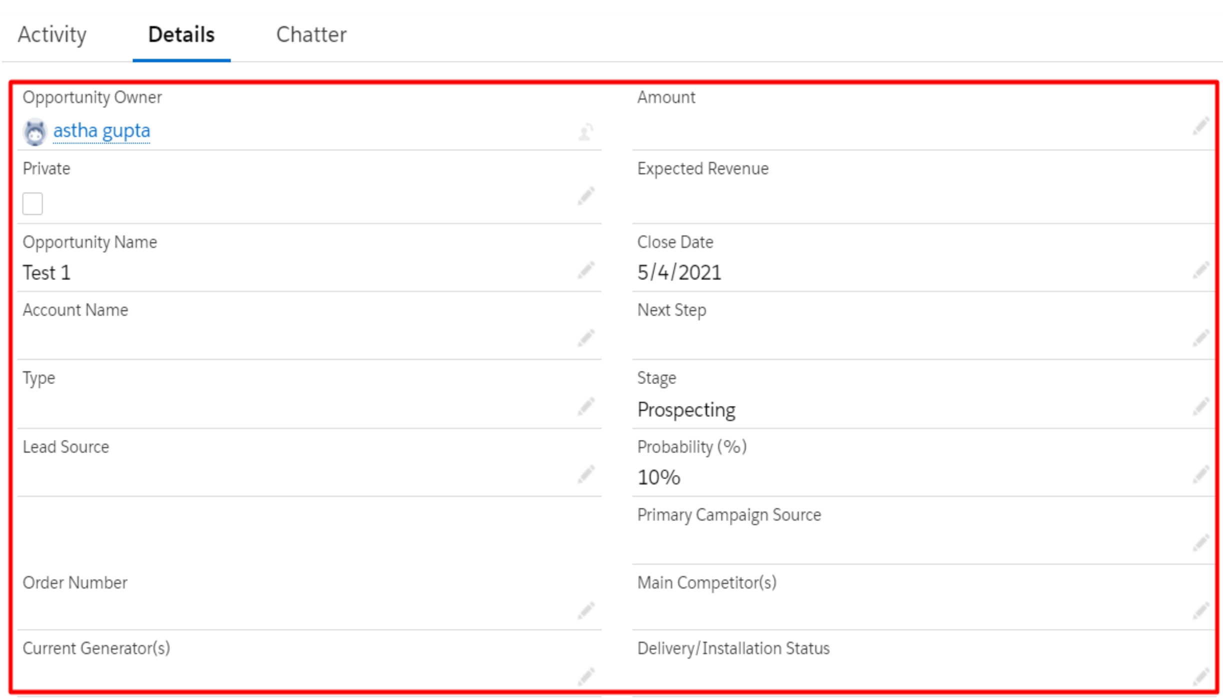
Step 4: Once you have filled the fields of opportunity name, close date and stage click on the button save.



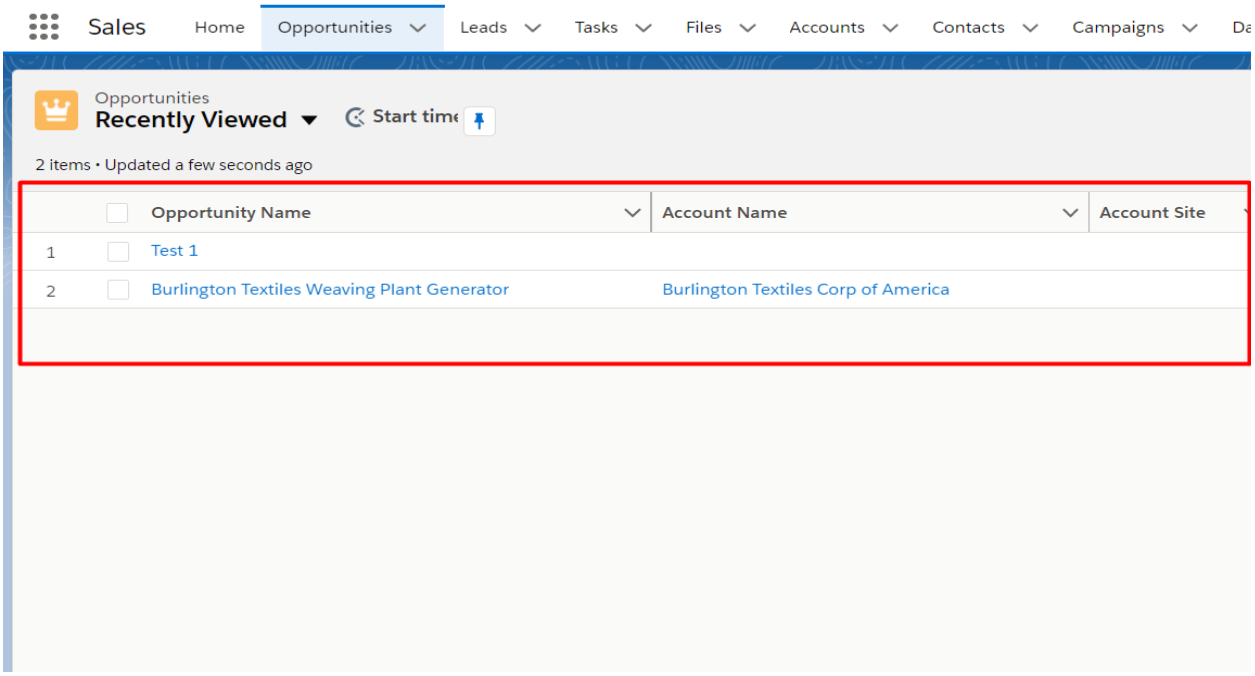
Step 5: As you save it you will be directed to the next page and you will be able to see the record that you created.



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.



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



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.