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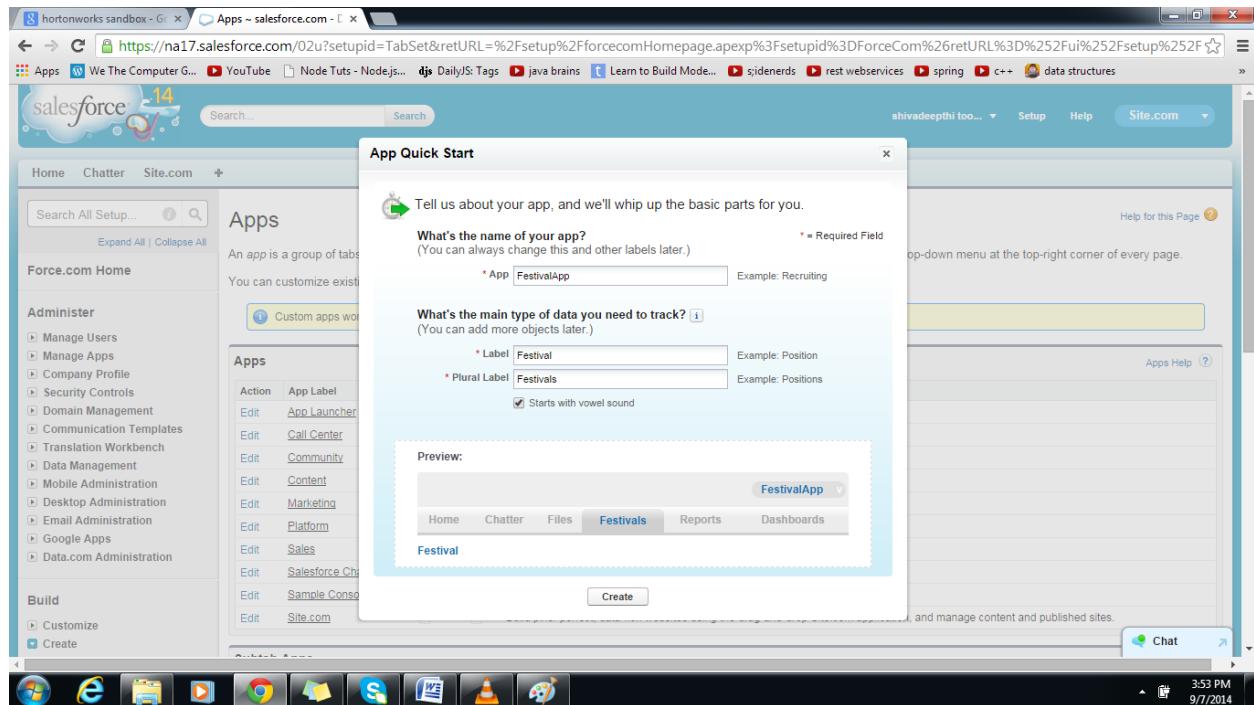
Introduction to sales force App development

Force.com is a PAAS (platform as a service).It gives the platform for developers to build applications easily. There are two ways to build an app on sales force using point click and actual coding.

Here we are going to build a music festival APP.

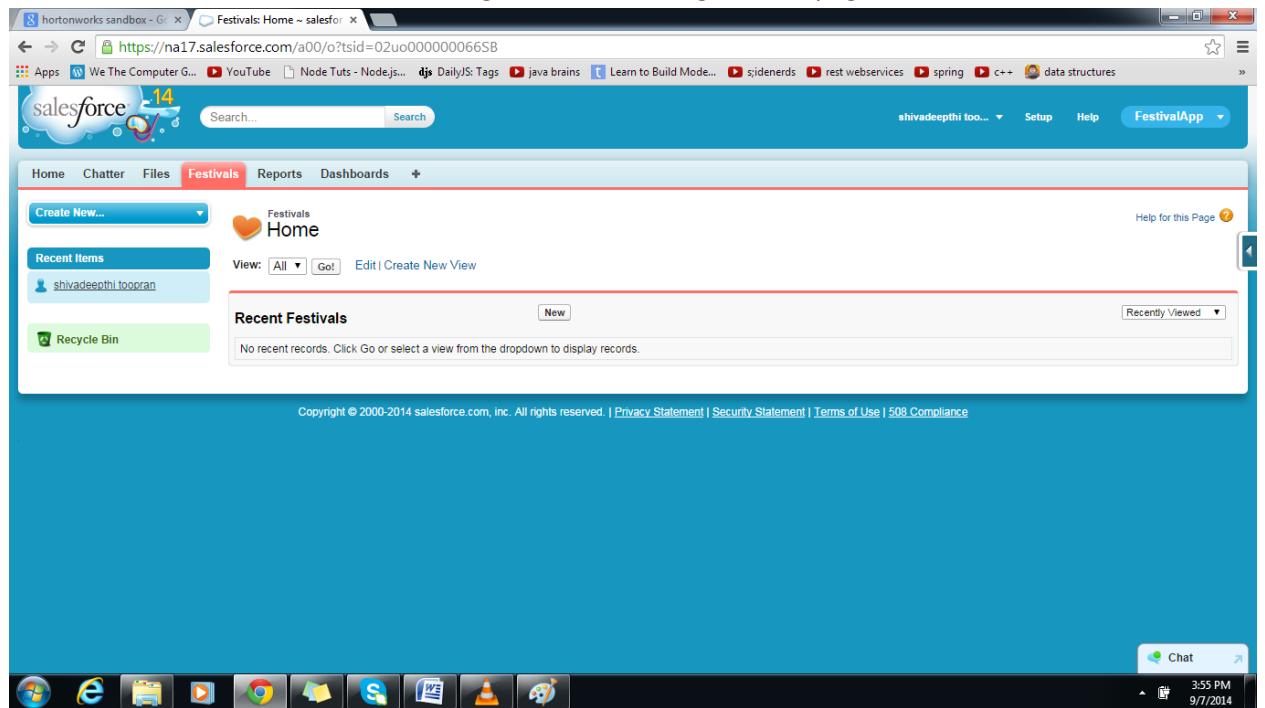
create an App on sales force

1. Create an account on force.com.
2. Sales force provides user with free PAAS (force.com) in order to develop applications easily
3. In order to develop an APP for music festival ,we have to break down and analyze the things we want to track like:
 - a. Attendees
 - b. Stages
 - c. Bands
4. Click on “BuildAPP” button to start building our music festival application. Fill in the details in the pop up like in the figure shown below:

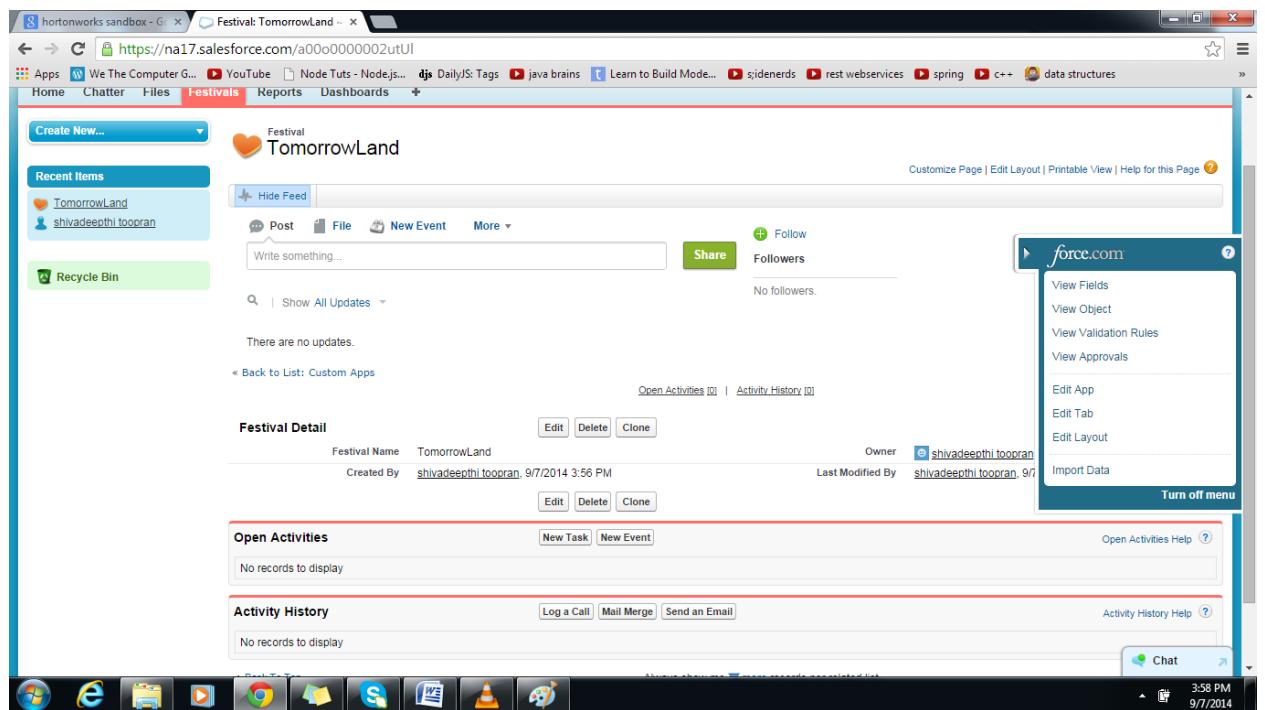


5. Then Click on “GO TO My APP “button. Which will navigate us to new page called “festival”.Here Objects are represented on a separate tab. Each object will have attributes and records

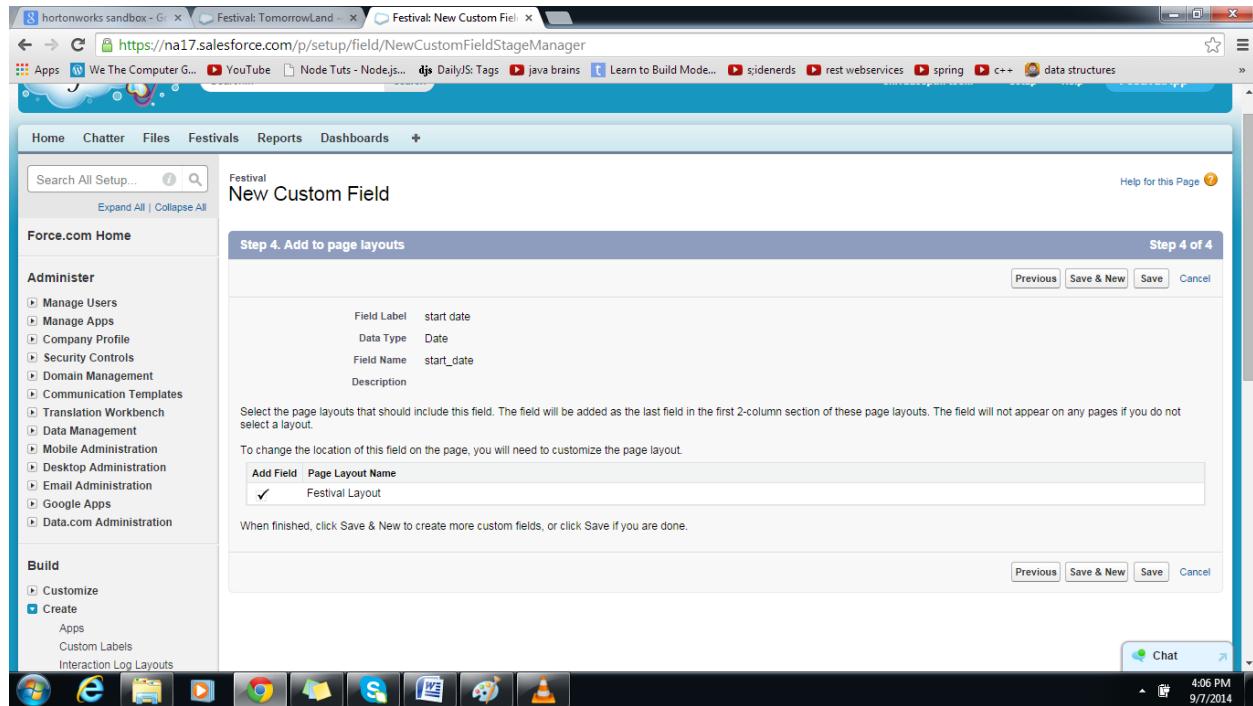
associated to it. We will be able to configure those all things on this page.



6. In order to create a new record inside “Festival” object, click on “New” button. We have created a festival object called “TOMMOROWLAND”. In order to add fields/attributes to the object, we have make use of the pop up from the right corner of the page.



7. We will be able to configure data type, field name and label, security permissions for each attribute/field we create.



8. The above picture shows festival object with start_date, end_date etc, and fields. Now in order to track info about attendees, we have to create an object called "Attendee". This will be created by using a "quick access menu" on "TOMMOROWLAND" festival page. Add in the attributes and save.

9. In order to add information into attendees object. Navigate to “ATTENDEE” tab and click on “NEW”. Add in the attendee and save.

10. In order to relate festival to attendee object. We have to create a relationship between both of them, i.e one festival can have more than one attendee going .So on sales force we have two types of relationships:

- a. Master-Detail-Child needs to have parent
- b. Look-up-Parent is optional.

We create a look-up relation between our festival and attendees object. Since we cannot append all all the people going to a festival on one table, we indeed create a separate field called “festival” in “ATTENDEES” object by clicking on the “quick access menu”. This will allow us to choose relationship, field name etc and then save it. This added field will be a new label in attendee’s object, where in we will be able to link each attendee to a festival he wanted to go.

The screenshot shows the Salesforce Setup interface for creating a custom object named 'Attendee'. The 'Custom Object Definition' tab is selected. The object details are as follows:

- Singular Label:** Attendee
- Plural Label:** Attendees
- Object Name:** Attendee
- API Name:** Attendee__c

Checkboxes for various settings are checked:

- Enable Reports:
- Track Activities:
- Allow Sharing:
- Allow Bulk API Access:
- Allow Streaming API Access:
- Track Field History:
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window
- Modified By: shivadeepthi tooran, 9/7/2014 4:19 PM

The 'Standard Fields' section lists the fields created:

Action	Field Label	Field Name	Data Type	Controlling Field
Edit	Attendee Name	Name	Text(80)	
Edit	Created By	CreatedBy	Lookup(User)	
Edit	Last Modified By	LastModifiedBy	Lookup(User)	
Edit	Owner	Owner	Lookup(User,Queue)	

The 'Custom Fields & Relationships' section lists the relationships created:

Action	Field Label	API Name	Data Type	Controlling Field	Modified By
Edit Del	email	email__c	Email		shivadeepthi tooran, 9/7/2014 4:23 PM
Edit Del	Festival	Festival__c	Lookup(Festival)		shivadeepthi tooran, 9/7/2014 4:45 PM
Edit Del	phone	phone__c	Phone		shivadeepthi tooran, 9/7/2014 4:23 PM
Edit Del	purchasedate	purchasedate__c	Date		shivadeepthi tooran, 9/7/2014 4:24 PM
Edit Del Replace	purchaseSource	purchaseSource__c	Picklist		shivadeepthi tooran, 9/7/2014 4:25 PM
Edit Del Replace	TicketType	TicketType__c	Picklist		shivadeepthi tooran, 9/7/2014 4:28 PM

11. Now in order to track “num of tickets” sold, or number of specific ticket type sold in a festival, sales force provides us a data type called “roll up” and “formula” types. Where in we will be able to specify the rules as show below.

hortonworks sandbox - G Attendees: Home ~ salesfo Festival: New Custom Field

https://na17.salesforce.com/p/setup/field/NewCustomFieldStageManager

Home Chatter Files Festivals Reports Dashboards Attendees

Search All Setup... Expand All | Collapse All

Festival New Custom Field

Help for this Page ?

Step 3 of 5

Previous Next Cancel

Select Object to Summarize

Master Object: Festival
Summarized Object: Attendees

Select Roll-Up Type

COUNT (radio button selected)
SUM
MIN
MAX

Field to Aggregate: Tickets purchased

Filter Criteria

All records should be included in the calculation
Only records meeting certain criteria should be included in the calculation

Field	Operator	Value	AND
TicketType	equals	Full Madness Pass Comfort	AND
--None--	--None--		

Chat 5:25 PM 9/7/2014

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.
- Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.
- Checkbox Allows users to select a True (checked) or False (unchecked) value.
- Currency Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful in Excel or another spreadsheet.

Step 3 of 5

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: `Fahrenheit = 1.8 * Celsius__c + 32` [More Examples...](#)

Quick Tips

- Getting Started
- Operators & Functions

Simple Formula **Advanced Formula**

Select Field Type Insert Field

Insert Merge Field Insert Operator

Total tickets sold (Number) =

```
Total_Full_Madness_Pass__c + Total_Full_Madness_Pass_Comfort__c
```

12. We can also validate the number of tickets brought by the customers by writing a validation rule. This can be done by clicking on “validation rule” from quick access menu and set the the validation.

hortonworks sandbox - G Attende Validation Rule - Festival: TomorrowLand - https://na17.salesforce.com/03d/e?setupid=CustomObjects

Manage Users
Manage Apps
Company Profile
Security Controls
Domain Management
Communication Templates
Translation Workbench
Data Management
Mobile Administration
Desktop Administration
Email Administration
Google Apps
Data.com Administration

Build
Customize
Create
Objects
Packages
Report Types
Tabs
Global Actions
Workflow & Approvals

Develop
Schema Builder
Canvas App Previewer
Installed Packages

Rule Name:
Active:
Description: no of tickets bought should be less than 8 and greater than one

Error Condition Formula
Example: More Examples
Display an error if Discount is more than 30%
If this formula expression is true, display the text defined in the Error Message area

Tickets_purchased_c > 8 || Tickets_purchased_c < 1

Functions
All Function Categories
ABS
AND
BEGINS
BLANKVALUE
BR
CASE
Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign

Check Syntax: No errors found
Help on this function

Error Message
Example:
This message will appear when Error Condition formula is true
Error Message:

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hortonworks sandbox - G Attende Edit: New Attendee - Festival: TomorrowLand - https://na17.salesforce.com/a/01/e

Home Chatter Files Festivals Reports Dashboards Attendees +

Create New...
Recent Items
TomorrowLand
shivadeepthi
shivadeepthi_loopran
Jonny concert
Recycle Bin

Attendee Edit: New Attendee

Attendee Edit
Save Save & New Cancel

Error: Invalid Data.
Review all error messages below to correct your data.
Dudeyou have to buy 1 to 8 num of tickets

Information
Attendee Name:
email:
phone:
purchasedate: (9/7/2014)
purchaseSource:
TicketType:
Festival:
Tickets purchased:

Save Save & New Cancel

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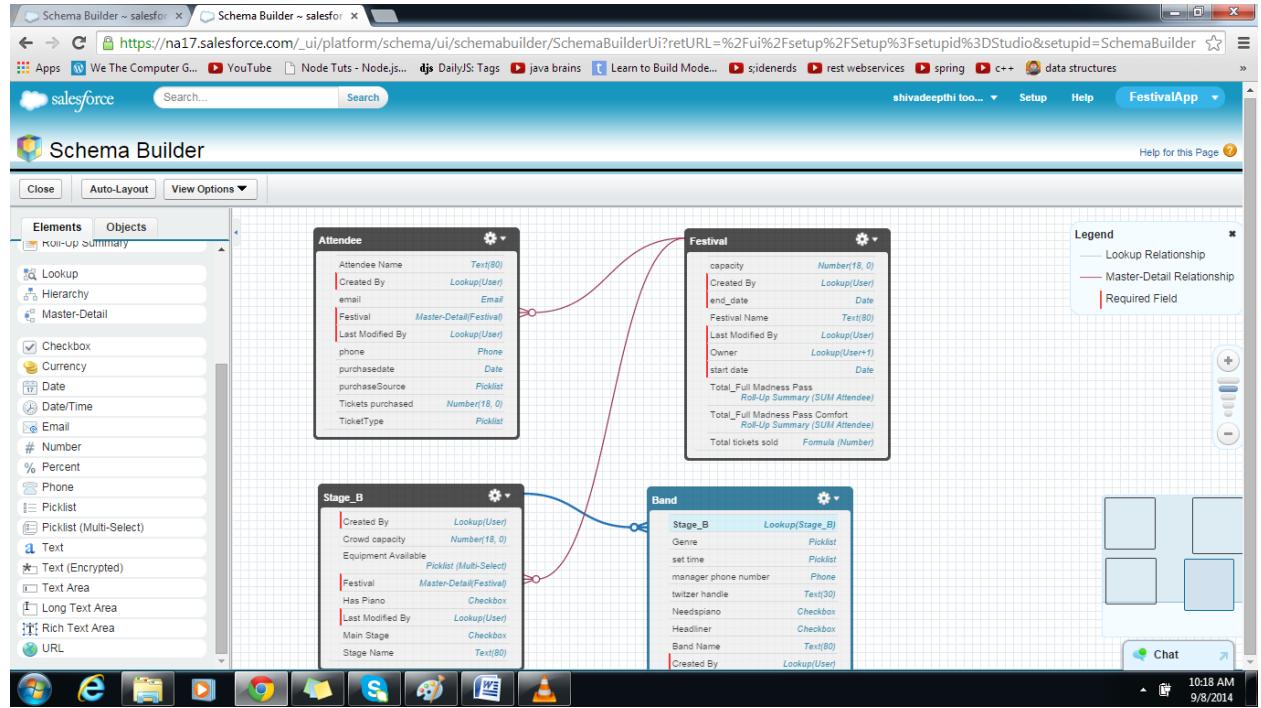
Schema building-(Building a data model)

13. We can create “Stages object also in a similar way. We can view the overall structure of our application by navigating to “setup” and under build->we have an option called “Schema builder”. This will show us the overall object structure, view and relationships between objects.

14. We can also create a band object using schema builder. This tool provides us with drag and drop facility in order to add the fields and attributes easily. We can do this using the object setup in

one clean sweep but its lot more easily using this schema builder.

15. Now the relationship between Stages and Bands is one –many. It can either be master-detail or look-up relationship .Here we choose lookup because a band can be there with a stage been decided. Since the band is the child of Stage (parent), we have to put the relation ship on child object i.e., (band).

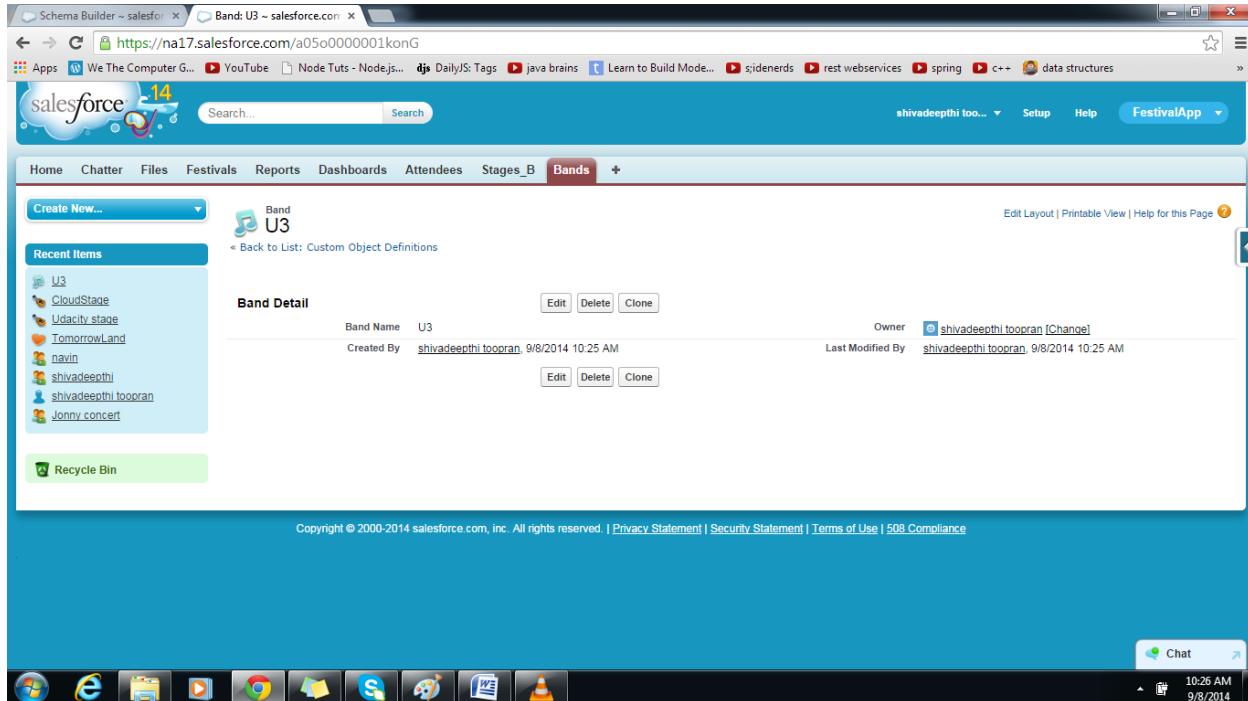


16. But there is a trade off by building an object using schema builder .We will have to create a separate tab by searching for a keyword "tab" on object setup page. Then drag the added fields on to Band object by editing the "object layout".

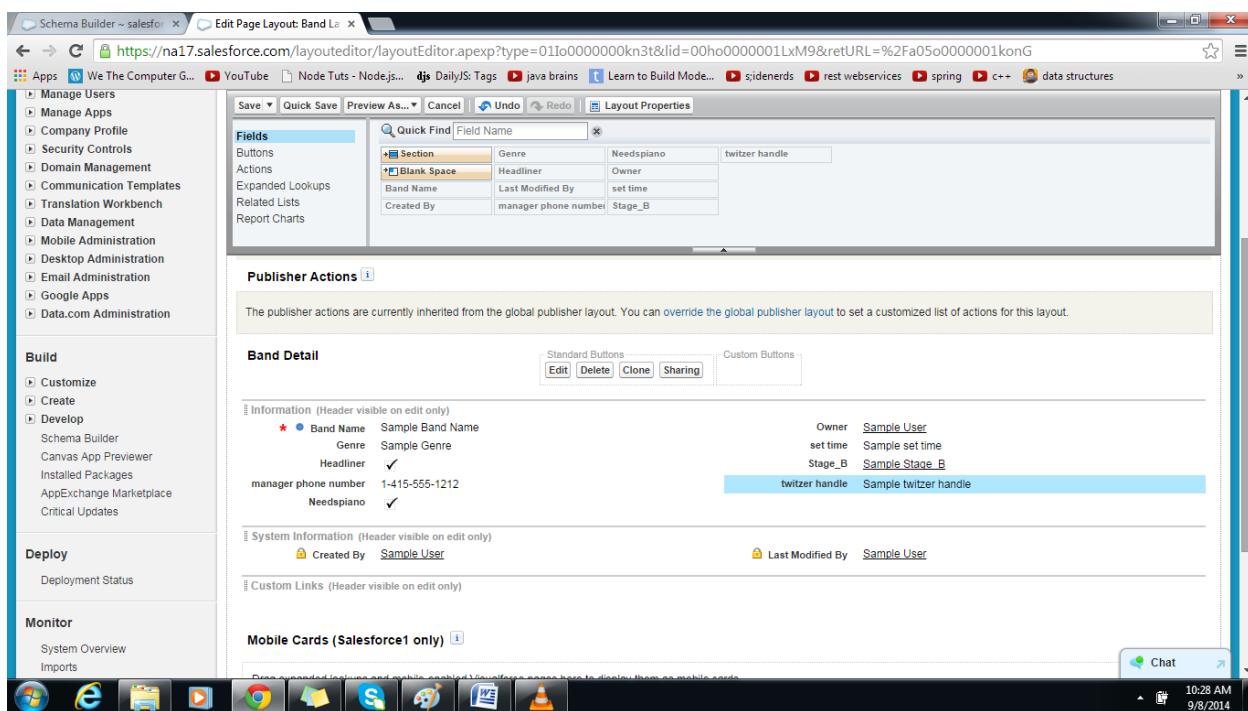
The screenshot shows the Salesforce Setup page for creating a custom tab. The left sidebar lists sections: Home, Chatter, Files, Festivals, Reports, Dashboards, Attendees, Stages_B, and a plus sign. The main area is titled "Custom Tabs" and contains sections for "Custom Object Tabs", "Web Tabs", and "Visualforce Tabs". In the "Custom Object Tabs" section, there is a table with columns: Action, Label, Tab Style, and Description. It shows three tabs: "Attendees" (People icon), "Festivals" (Heart icon), and "Stages_B" (Guitar icon). Below these sections, there are buttons for "New" and "What Is This?". The status bar at the bottom right shows "10:20 AM 9/8/2014".

Add in a record for band by clicking on “new”, and by clicking on “edit layout” at the top right

Corner of the page we add drag the added fields onto band object.



The screenshot shows the Salesforce Band object detail page for 'U3'. The page title is 'Band: U3 ~ salesforce.com'. The URL is <https://na17.salesforce.com/a05o0000001konG>. The page header includes 'shivadeepthi too...' and 'FestivalApp'. The main content area shows the 'Band Detail' for 'U3', with fields: Band Name (U3), Created By (shivadeepthi tooran), Last Modified By (shivadeepthi tooran), Owner (shivadeepthi tooran), and a 'Recycle Bin' button. The left sidebar shows 'Recent Items' including 'U3', 'CloudStage', 'Udacity stage', 'TomorrowLand', 'navin', 'shivadeepthi', 'shivadeepthi tooran', and 'Jonny concert'. The bottom of the page includes a copyright notice and a toolbar with various icons.



The screenshot shows the 'Edit Page Layout: Band' page. The URL is <https://na17.salesforce.com/layoutEditor/layoutEditor.apexp?type=01Io00000000kn3t&lid=00ho0000001LxM9&retURL=%2Fa05o0000001konG>. The left sidebar includes 'Manage Users', 'Build', 'Deploy', and 'Monitor' sections. The main content area shows the 'Layout Properties' for the 'Band' object. It includes a 'Fields' section with a 'Quick Find' field, a 'Publisher Actions' section, and a 'Band Detail' section. The 'Band Detail' section displays fields: Band Name (Sample Band Name), Genre (Sample Genre), Headliner (✓), manager phone number (1-415-555-1212), Needspiano (✓), Owner (Sample User), set time (Sample set time), Stage_B (Sample Stage_B), and twitzer handle (Sample twitzer handle). The bottom of the page includes a toolbar with various icons.

17. If suppose, we have many number of bands records, then inputting all the values is a tedious process. Sales force provides us with an import wizard called "CSV import wizard" which basically allows us to input the records present on spread sheet into our structure by mapping the fields we want.

Import Wizard for student - Google Chrome
https://na17.salesforce.com/_ui/ui/setup/imp/ImportWizard

Step 3 of 7

Band records are owned by users. If there is a record owner column in your file, specify below the user field that it represents. If you do not include a record owner column in your file, you will be saved as the owner of all created records.

Which user field are you including in your file to designate record owners?

Name
 Salesforce.com ID
 External ID
 None

Band records have lookup relationship fields that you can set to link Bands with existing records in salesforce.com.

Note: Only Band records will be created or updated as a result of this import operation.

Which lookup fields, if any, are included in your import file?

Object Access Level
 Stage_B

Previous Next

Get Info Before You Start

- FAQ: Importing
- Importing Help
- Sign up for Importing Training

Top 5 Questions

- How do I prevent duplicates?
- How do I mass update existing records?
- Which fields are required?
- Can I update lookup fields during import?
- What is an external ID?

Import Queue

- Which import files are pending?

10:34 AM 9/8/2014

Import Wizard for student - Google Chrome
https://na17.salesforce.com/_ui/ui/setup/imp/ImportWizard

Step 5 of 7

Use the drop-down lists below to specify the salesforce.com fields that correspond to the columns in your import file. For your convenience, identically matching labels will be automatically selected.

Import Field	Salesforce.com Field
Band Name (col 0)	Band Name
Genre (col 1)	Genre
Has Piano (col 2)	Needspiano
Headliner (col 3)	Headliner
Manager Phone (col 4)	manager phone number
Special Requests (col 5)	--None--
Twitter (col 6)	twitter handle
Expected Draw (col 7)	--None--

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Top 5 Questions

- How do I prevent duplicates?
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- Can I update lookup fields during import?
- What is an external ID?

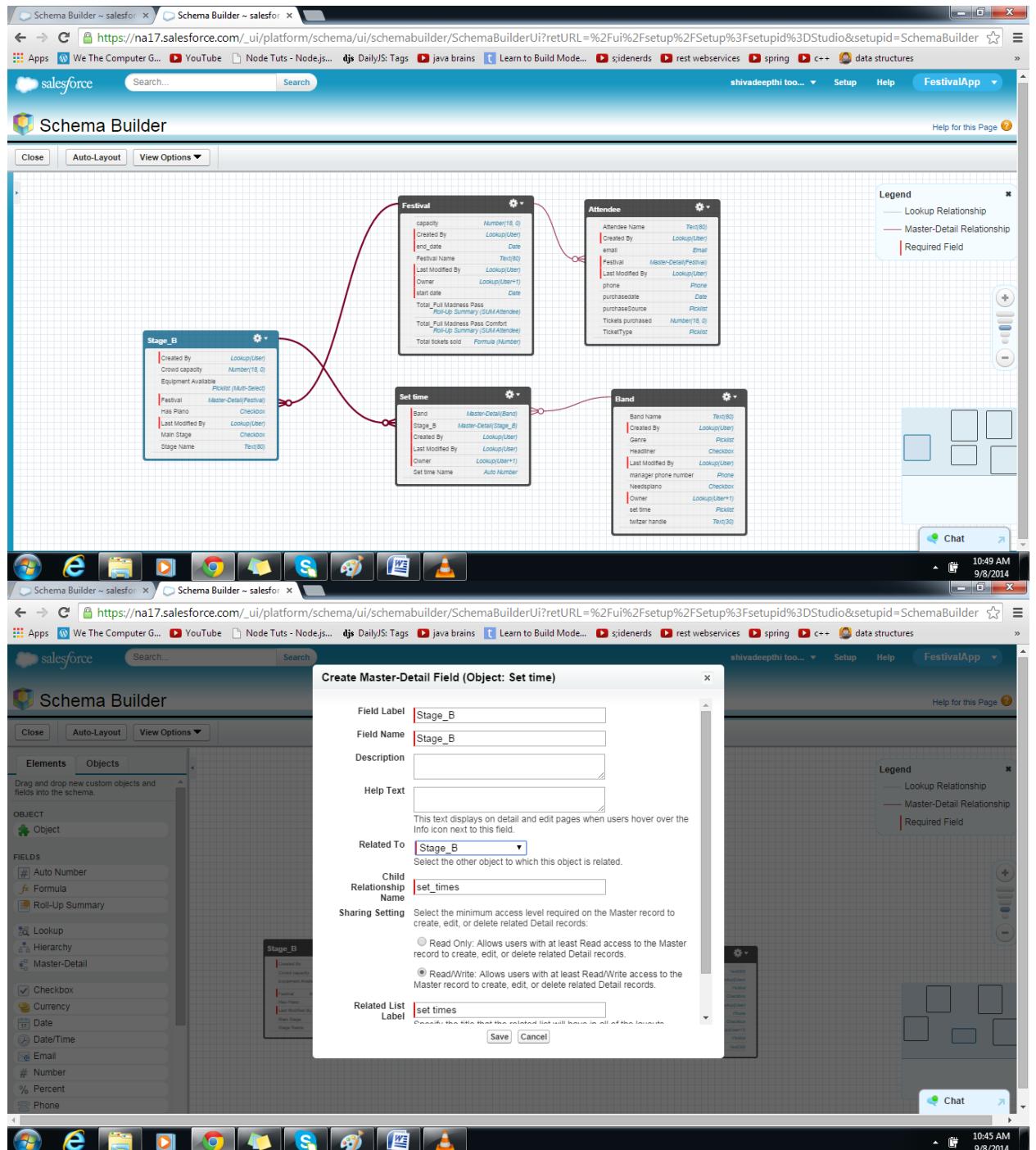
Import Queue

- Which import files are pending?

10:35 AM 9/8/2014

18. Now that we have set the relation between stages and bands as many to one. What if we have multiple bands playing a diff time on the same stage? This is like many to many relationships between them. Sales force introduces an object called “junction object” which breaks the many-many relationship into two one-many relationships. We can build a junction object by jus going to object setup->festival app->accessing the quick access menu->create object. We can add new fields/attributes if required in the same way as we did previously.

19. In order to map this junction object “set times” with bands and stage object we add master detail relationship between both of them. The below picture shows the overall view of our application on schema builder.



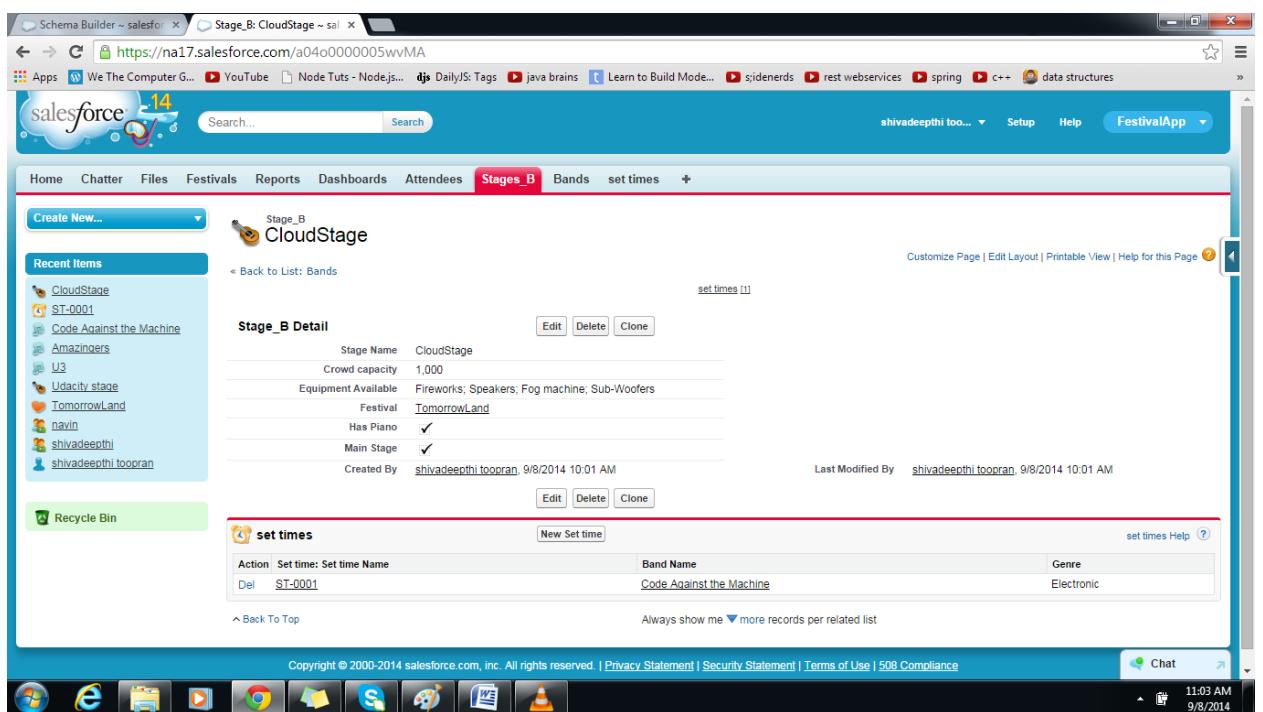
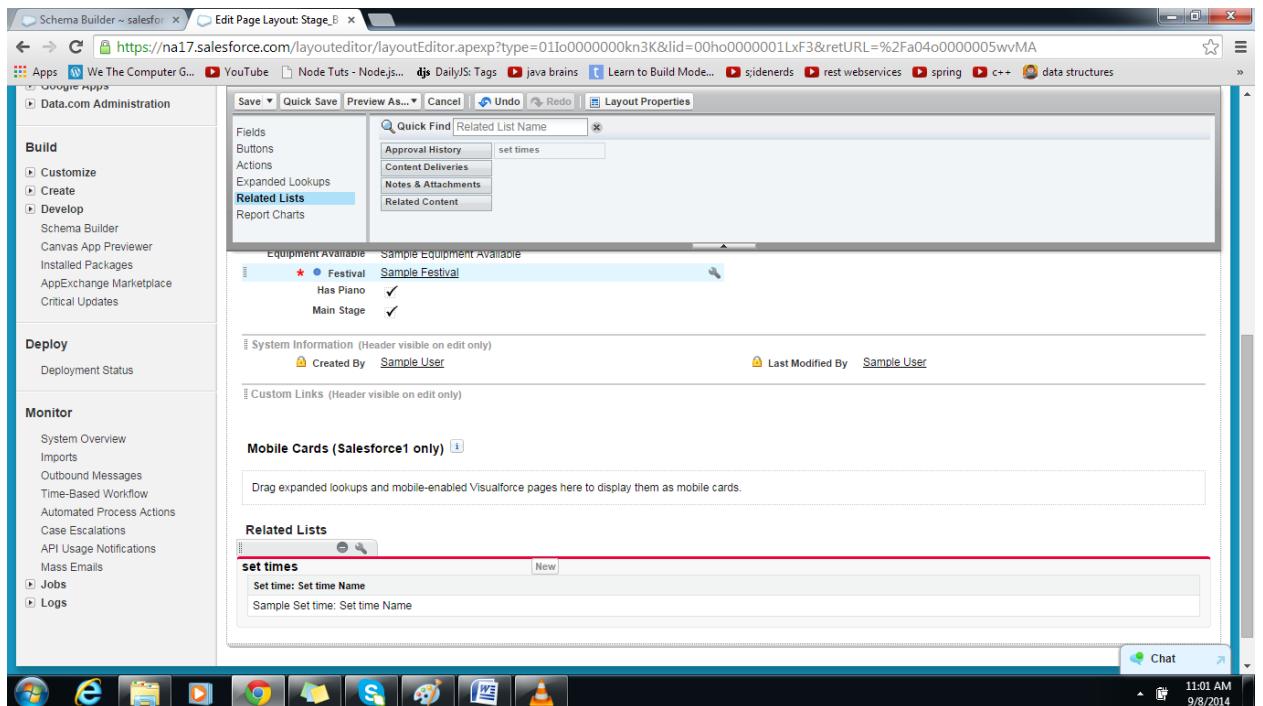
Set time Detail

Set time Name	ST-0001	Edit Delete Clone
Stage_B	CloudStage	
Band	Code Against the Machine	
Created By	shivadeepthi_toopran, 9/8/2014 10:57 AM	Last Modified By shivadeepthi_toopran , 9/8/2014 10:57 AM
	Edit Delete Clone	

20. Now we need to include this “set times” object detail in bands and stage object .In order to include it in stage object, navigate to stage tab, on the right corner of the page click on edit layout link. In that page now we should select related links “set times” and drag it on to relate list section. Similarly we have to do the same in “Band” object too.

Set time Detail

Set time Name	ST-0001	Edit Delete Clone
Stage_B	CloudStage	
Band	Code Against the Machine	
Created By	shivadeepthi_toopran, 9/8/2014 10:57 AM	Last Modified By shivadeepthi_toopran , 9/8/2014 10:57 AM
	Edit Delete Clone	



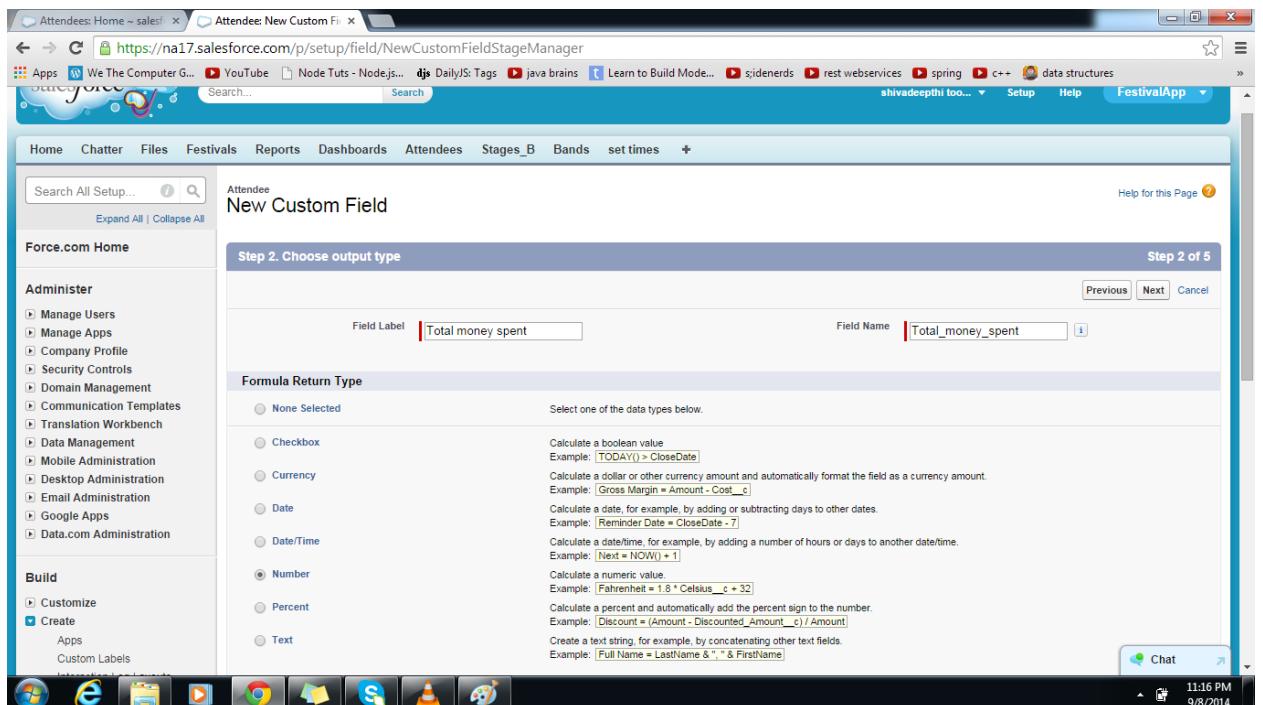
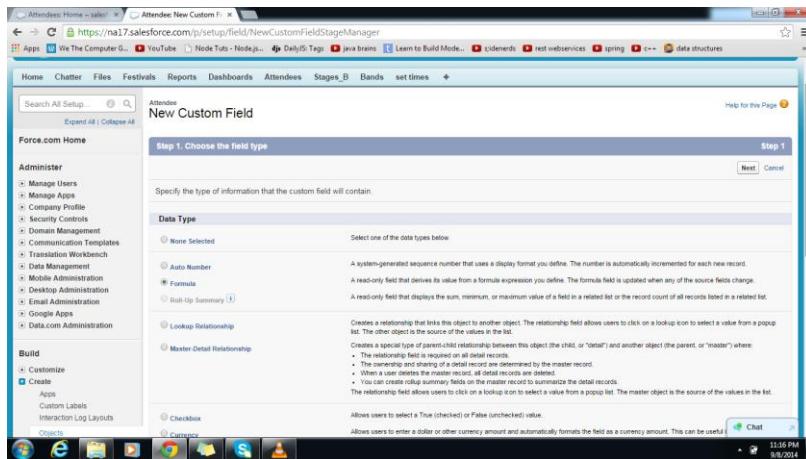
In the above figure we are able to view the band playing on the stage at a given time. Similarly we will be able to view stage on which the band is playing.

21. Now in order to manage stages, we need an employee .For such scenario sales force provides us with an in built object called “user”. This user object will be the parent to “stage” object. In order to make that relationship we have create a separate field on stage object and add relationship as “master-detail” or lookup.

The screenshot shows the Salesforce interface with the following details:

- Page Title:** Stage_B: CloudStage
- Page URL:** https://na17.salesforce.com/a04o0000005vvMA
- Recent Items:**
 - CloudStage
 - Code Against the Machine
 - ST-0001
 - Amazingers
 - U3
 - Udacity stage
 - TomorrowLand
 - navin
 - shivadeepthi
 - shivadeepthi tooran
- Stage_B Detail View:**
 - Stage Name: CloudStage
 - Crowd capacity: 1,000
 - Equipment Available: Fireworks, Speakers, Fog machine, Sub-Woofers
 - Festival: TomorrowLand
 - Has Piano: ✓
 - Main Stage: ✓
 - Stage manager: shivadeepthi tooran
 - Created By: shivadeepthi tooran, 9/8/2014 10:01 AM
 - Last Modified By: shivadeepthi tooran, 9/8/2014 10:01 AM
- set times:**
 - Action: Set time: Set time Name
 - Del: ST-0001
 - Band Name: Code Against the Machine
 - Genre: Electronic

22. Now That we have created the entire required objects which we mentioned that we need for tracking. Uploaded the data from CSV, now it's time for us to visually represent it. In sales force we represent it using "Reports" and "Dashboards".
23. Reports: Here we will be able to create reports on the data that got into the application. Suppose we would want to find the "total revenue in a festival" or "total monthly revenue" or "distribution of genre".
24. Dashboard: It's a place where we choose the correct graphical notation for a given report.i.e, line graph, bar chart, scatter graph etc.
25. Now we are going to build "total revenue in festival" chart and show it on dashboard section.
26. For that we have to create a new field called "total amount spent" for each attendee and plug in a formula to calculate automatically, depending on the type of ticket and number of ticket purchased.



Attendee: shivadeepthi ~ x Attendee: New Custom Fi x https://na17.salesforce.com/p/setup/field/NewCustomFieldStageManager

Administrator

- Manage Users
- Manage Apps
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Email Administration
- Google Apps
- Data.com Administration

Build

- Customize
- Create
 - Apps
 - Custom Labels
 - Interaction Log Layouts
 - Objects
 - Packages
 - Report Types
 - Tabs
 - Global Actions
 - Workflow & Approvals
- Develop
- Schema Builder
- Canvas App Previewer

Simple Formula Advanced Formula

Insert Field Insert Operator Functions

Example: Fahrenheit = 1.8 * Celsius__c + 32 [More Examples...](#)

Total money spent (Number) =
IF(ISICKVAL(TicketType__c, "Full Madness Pass Comfort"), 100 * Tickets_purchased__c, 50 * Tickets_purchased__c)

Check Syntax: No syntax errors in merge fields or functions. (Compiled size: 150 characters)

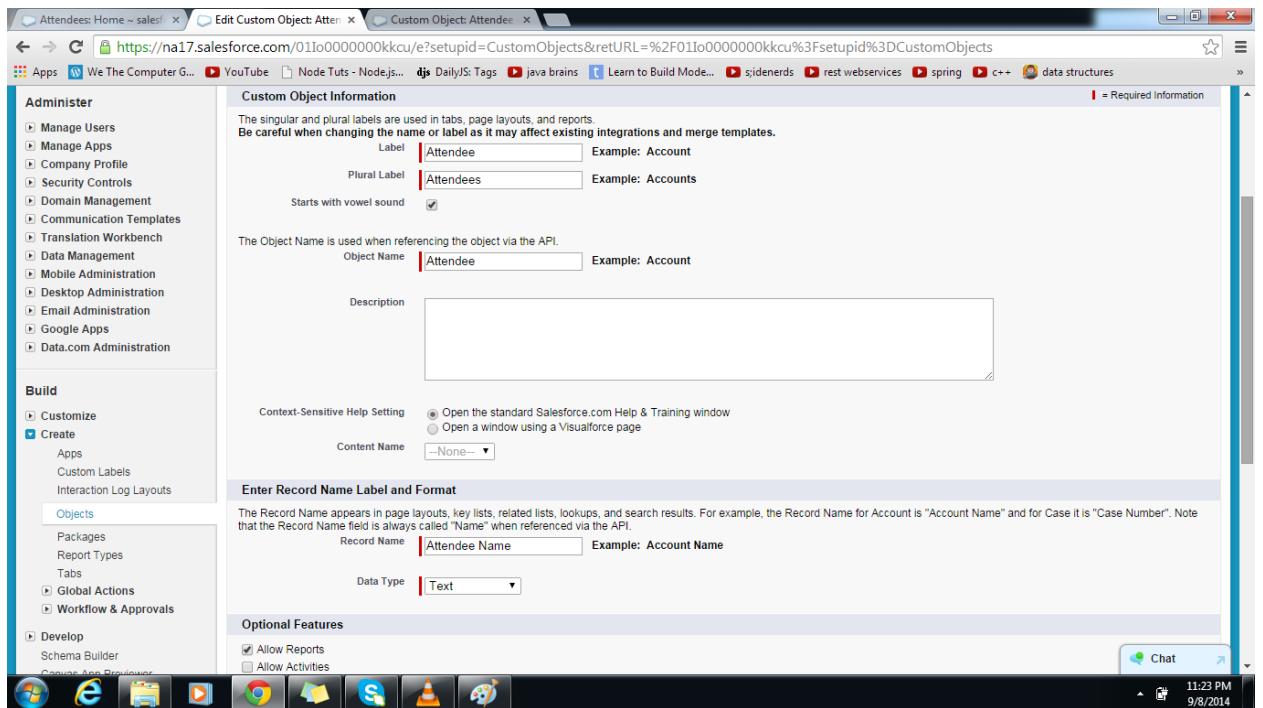
Attendee: shivadeepthi ~ x Custom Object: Attendee x https://na17.salesforce.com/a01o0000001cQxQ

Attendee Detail

Attendee Name	shivadeepthi
email	naveneet.hs@rao.co.uk
phone	(246) 546-4344
purchasedate	9/7/2014
purchaseSource	FaceBook
TicketType	Full Madness Pass
Festival	TomorrowLand
Tickets purchased	2
Total money spent	100.00
Created By	shivadeepthi_tooran, 9/7/2014 4:38 PM
Last Modified By	shivadeepthi_tooran, 9/8/2014 1:01 PM

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27. In order to create a report on attendee object we need to check in a configuration option "activate reports" in edit custom object page of attendee.



Create Reports, charts on dashboard(Visualization)

28. Now to create reports, navigate to reports tab and search for “attendee”, which will give us “Festival with attendee” object. Select that object and click on “create”. This will give the table with lookup fields, now drag and drop the fields that we require for constructing our report.

The top screenshot shows the 'Create New Report' page in the Salesforce Report Builder. The URL is <https://na17.salesforce.com/reportbuilder/reportType.apexp>. The page includes a search bar, a 'Select Report Types to Hide' button, and a 'Select Report Type' sidebar with a search field and a list of report types. The list shows 'Other Reports' and 'Festivals with Attendees'.

The bottom screenshot shows the 'Report Type: Festivals with Attendees' page. The URL is <https://na17.salesforce.com/reportbuilder/reportType.apexp>. The page includes a 'Save' button, 'Report Properties' button, 'Add Report Type' button, and a 'Run Report' button. The 'Fields' section on the left lists various fields like 'Festival' and 'Attendee'. The 'Preview' section shows a tabular format with columns: Festival: Festival Name, Attendee: Attendee Name, Total money spent, purchaseSource, and TicketType. The data preview table is as follows:

Festival: Festival Name	Attendee: Attendee Name	Total money spent	purchaseSource	TicketType
TomorrowLand	navin	100.00	Official Website	Full Madness Pass
TomorrowLand	Jonny concert	400.00	Box Office	Full Madness Pass Comfort
TomorrowLand	shivadeepthi	100.00	FaceBook	Full Madness Pass
TomorrowLand	Louis Yu	150.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Brittney Tannehill	150.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Beth Hillhouse	50.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Jennifer Presswood	100.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Leigh Andrew	150.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Genaro Brasfield	200.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Jamie Genest	50.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Carolyn Gridley	100.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Jody Maxfield	300.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Vanessa McCaffery	150.00	3rd Party Ticket Vendor	Full Madness Pass

29. There are different formats for a report.

- Tabular format: This represents the data in tab form.
- Summary: Similar to tabular form but adds little grouping
- Matrix: creates grouping on top and side.
- Joined: combination of bunch of reports and shows different types of data in different ways.

30. Now for creating a report for total revenue in a festival. We need to select “festival name”, “attendee name”, “ticket type”, “purchase source”, and “total money spent” by just dragging and dropping on to the table area. And select “summary” for grouping things.

Report Type: Festivals with Attendees
Unsaved Report

Fields

Filters

Preview

Festival	Festival Name	Attendee Name	Total money spent	purchaseSource	TicketType
TomorrowLand	Summary		100.00	Official Website	Full Madness Pass
TomorrowLand	Matrix		400.00	Box Office	Full Madness Pass Comfort
TomorrowLand	Joined		100.00	FaceBook	Full Madness Pass
TomorrowLand	Help me choose...	shill	150.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Beth Hillhouse		150.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Jennifer Presswood		50.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Leigh Andrew		150.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Genaro Brassfield		200.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Jamie Genest		50.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Carolyn Gridley		100.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Jody Maxfield		300.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Vanessa McCaffery		150.00	3rd Party Ticket Vendor	Full Madness Pass

31. Now we need to group by each ticket type and summarize the “total spent” on each ticket type. This grouping will give us the overall total gained by each festival. Edit the title and save and run.

Report Type: Festivals with Attendees
Unsaved Report

Fields

Filters

Preview

Festival	Festival Name	Attendee	Total money spent	purchaseSource	TicketType
TomorrowLand	navin		100.00	Official Website	Full Madness Pass
TomorrowLand	Jonny concert		400.00	Box Office	Full Madness Pass Comfort
TomorrowLand	shivadeepthi		100.00	FaceBook	Full Madness Pass
TomorrowLand	Louis Yu		150.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Brittney Tannehill		150.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Beth Hillhouse		50.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Jennifer Presswood		100.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Leigh Andrew		150.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Genaro Brassfield		200.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Jamie Genest		50.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Carolyn Gridley		100.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Jody Maxfield		300.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand	Vanessa McCaffery		150.00	3rd Party Ticket Vendor	Full Madness Pass
TomorrowLand			200.00	3rd Party Ticket Vendor	Full Madness Pass

Unsaved Report ~ salesfor x https://na17.salesforce.com/reportbuilder/reportType.apexp

Report Type: Festivals with Attendees

Unsaved Report

Save Save As Close Report Properties Add Report Type Run Report

Fields All #

Filters Add Show My festivals Date Field end_date Range All Time From To

Drag and drop to add fields to the report.

Festival: Festival Name Attendee: Attendee Name Total money spent purchaseSource

TomorrowLand	Beth Hillhouse	50.00	3rd Party Ticket Vendor
TomorrowLand	Jennifer Presswood	100.00	3rd Party Ticket Vendor
TomorrowLand	Leigh Andrew	150.00	3rd Party Ticket Vendor
TomorrowLand	Genaro Brassfield	200.00	3rd Party Ticket Vendor
TomorrowLand	Jamie Genest	50.00	3rd Party Ticket Vendor
TomorrowLand	Carolyn Gridley	100.00	3rd Party Ticket Vendor
TomorrowLand	Jody Maxfield	300.00	3rd Party Ticket Vendor
TomorrowLand	Vanessa McCaffery	150.00	3rd Party Ticket Vendor
TomorrowLand	Jeremy Rodman	200.00	3rd Party Ticket Vendor
TomorrowLand	Shay Dulaney	150.00	3rd Party Ticket Vendor
TomorrowLand	Charlene Reiber	150.00	3rd Party Ticket Vendor
TomorrowLand	Rhett Bissett	150.00	3rd Party Ticket Vendor
TomorrowLand	Reagan Topps	100.00	3rd Party Ticket Vendor
TomorrowLand	Juliana Silvis	100.00	3rd Party Ticket Vendor
TomorrowLand	Julia Robins	100.00	3rd Party Ticket Vendor
TicketType: Full Madness Pass Comfort (1 Record)			
TomorrowLand	Jonny concert	400.00	Box Office
Grand Totals (20 records)			

12:02 AM 9/9/2014 Chat

Summary of amount spent x https://na17.salesforce.com/00Oo0000002V8Jo/e?retURL=%2F00Oo0000002V8Jo

Report Type: Festivals with Attendees

Summary of amount spent

Save Save As Close Report Properties Add Report Type Run Report

Fields All #

Filters Add Show My festivals Date Field end_date Range All Time From To

Drag and drop to add fields to the report.

Festival: Festival Name Attendee: Attendee Name Total money spent purchaseSource

TicketType: Full Madness Pass (19 Records)			
Drop a field here to create a grouping. Hide			
TomorrowLand	navin	100	
TomorrowLand	shivadeepthi	100	
TomorrowLand	Louis Yu	150	
TomorrowLand	Brittney Tannehill	150	
TomorrowLand	Beth Hillhouse	50	
TomorrowLand	Jennifer Presswood	100	
TomorrowLand	Leigh Andrew	150	
TomorrowLand	Genaro Brassfield	200.00	3rd Party Ticket Vendor
TomorrowLand	Jamie Genest	50.00	3rd Party Ticket Vendor
TomorrowLand	Carolyn Gridley	100.00	3rd Party Ticket Vendor
TomorrowLand	Jody Maxfield	300.00	3rd Party Ticket Vendor
TomorrowLand	Vanessa McCaffery	150.00	3rd Party Ticket Vendor
TomorrowLand		200.00	3rd Party Ticket Vendor

Sort Ascending Sort Descending Group by this Field Summarize this Field Bucket this Field Remove Column

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Summary of amount spent

https://na17.salesforce.com/000o00000002VBJo

Festival	Festival Name	Attendee	Attendee Name	Total money spent	purchaseSource
TicketType: Full Madness Pass (219 records)					
				28,100.00	
TomorrowLand		pavin		100.00	Official Website
TomorrowLand		shivadeepthi		100.00	FaceBook
TomorrowLand		Louis Yu		150.00	3rd Party Ticket Vendor
TomorrowLand		Brittney Tannehill		150.00	3rd Party Ticket Vendor
TomorrowLand		Beth Hillhouse		50.00	3rd Party Ticket Vendor
TomorrowLand		Jennifer Presswood		100.00	3rd Party Ticket Vendor
TomorrowLand		Leigh Andrew		150.00	3rd Party Ticket Vendor
TomorrowLand		Genaro Brassfield		200.00	3rd Party Ticket Vendor
TomorrowLand		Jamie Genest		50.00	3rd Party Ticket Vendor
TomorrowLand		Carolyn Gridley		100.00	3rd Party Ticket Vendor
TomorrowLand		Jody Maxfield		300.00	3rd Party Ticket Vendor
TomorrowLand		Vanessa McCaffery		150.00	3rd Party Ticket Vendor
TomorrowLand		Jeremy Rodman		200.00	3rd Party Ticket Vendor
TomorrowLand		Shay Dulaney		150.00	3rd Party Ticket Vendor
TomorrowLand		Charlene Reiber		150.00	3rd Party Ticket Vendor
TomorrowLand		Rhett Bissett		150.00	3rd Party Ticket Vendor
TomorrowLand		Reagan Topps		100.00	3rd Party Ticket Vendor
TomorrowLand		Juliana Silvis		100.00	3rd Party Ticket Vendor
TomorrowLand		Julia Robins		100.00	3rd Party Ticket Vendor
TomorrowLand		Jarrett Breedlove		200.00	3rd Party Ticket Vendor
TomorrowLand		Dewey Wein		200.00	3rd Party Ticket Vendor
TomorrowLand		Elisabeth Reardon		50.00	3rd Party Ticket Vendor
TomorrowLand		Katherine Slavden		50.00	3rd Party Ticket Vendor
TomorrowLand		Lynette Plaster		50.00	3rd Party Ticket Vendor
TomorrowLand		Edith McIntire		50.00	3rd Party Ticket Vendor
TomorrowLand		Charla Lecroy		100.00	3rd Party Ticket Vendor
TomorrowLand		Bradford Lawhon		150.00	3rd Party Ticket Vendor
TomorrowLand		Shannon Steptoe		200.00	3rd Party Ticket Vendor
TomorrowLand		Brennan Towles		250.00	3rd Party Ticket Vendor

32. Now to display it on dashboard, navigate to dashboard tab and click on “create new dashboard”.

This will navigate us to new page where in will be able to select the type of graph we would want to represent, and the report we want to visualize. On the left corner of the page, we will have to select the graph by drag and dropping it on the dash board area, and select the custom report which we created previously in reports and drop it on the selected graph.

Then save it on the dashboard.

Dashboard

https://na17.salesforce.com/01Z/e?retURL=%2F01Z

Dashboard Properties Add Filter

Recent | My | All

Reports My Personal Custom Reports Summary of amount spent

Visualforce Pages

Save Save As Close Dashboard Properties Add Filter

Click to enter a dashboard description.

Medium Medium Medium

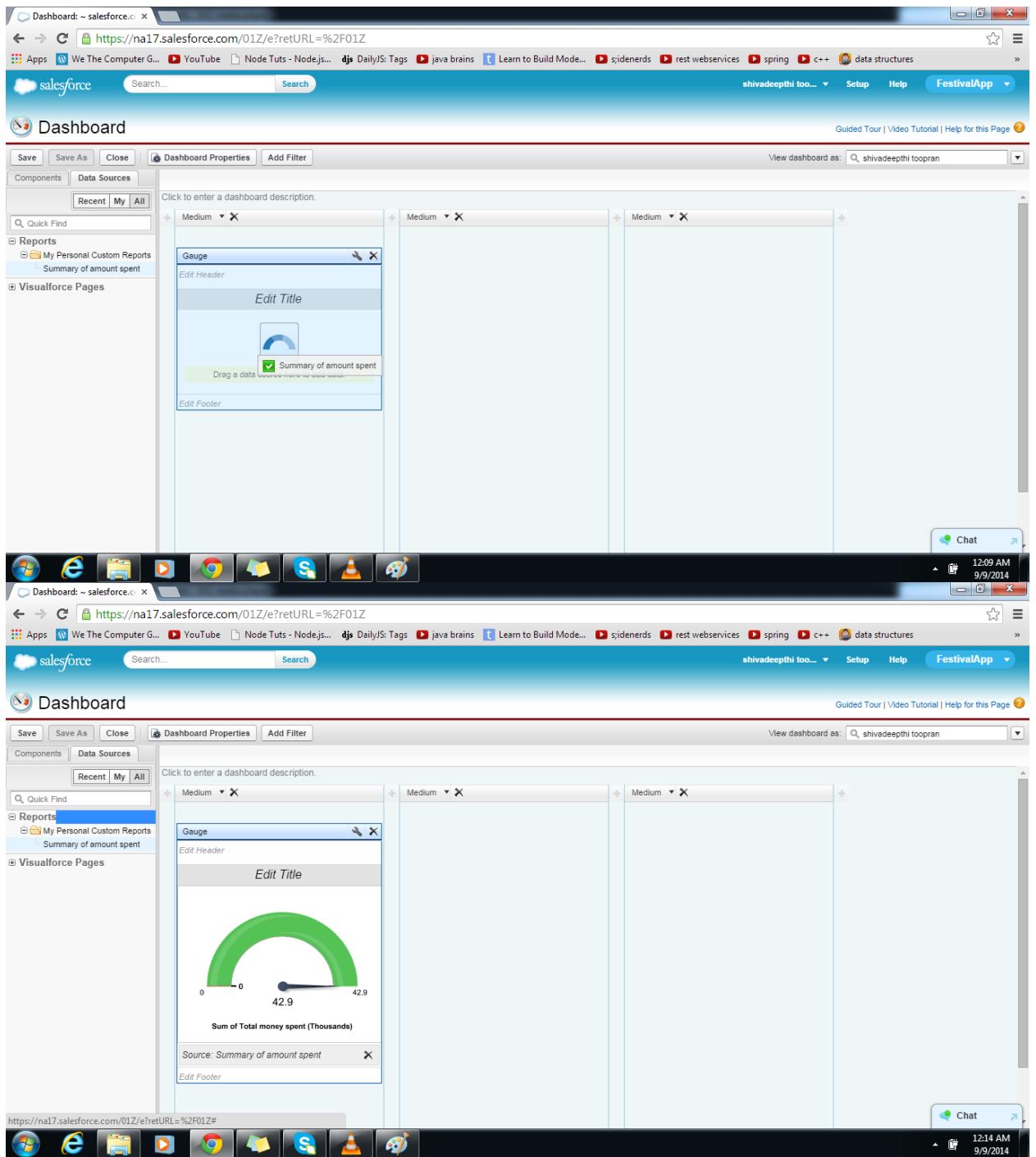
Gauge Edit Header Edit Title Edit Footer

Drag a data source here to add data.

Guided Tour | Video Tutorial | Help for this Page

View dashboard as: shivadeepthi topman

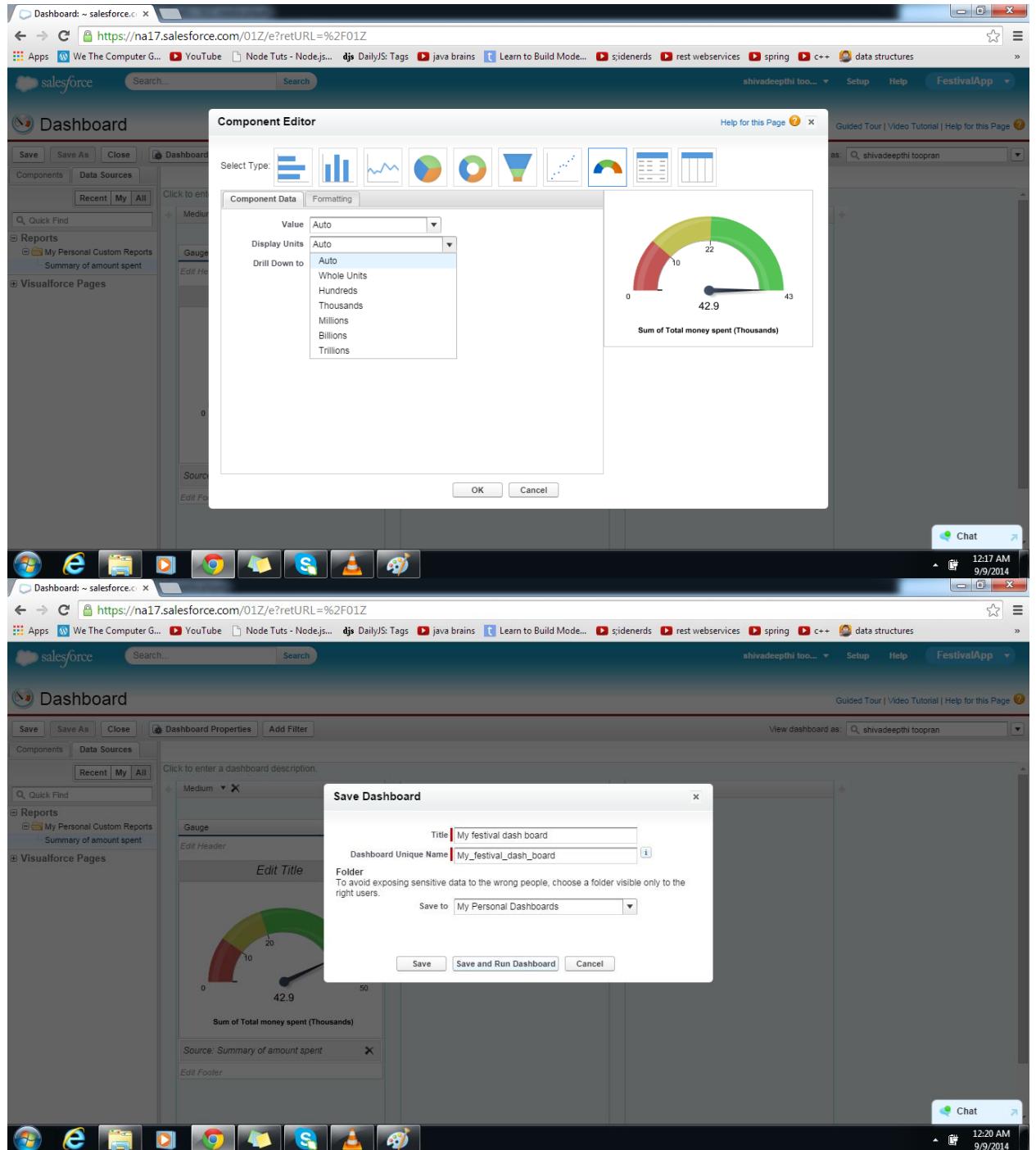
https://na17.salesforce.com/01Z/e?retURL=%2F01Z



33. We can customize our graph by clicking on the little “wrench” at the top of the graph. There are different kinds of charts available

- Bar/column: good for comparing amounts
- Line graph: good for showing changes
- Pie graph: Proportion of a single value
- Donut: it's like pie chart but displays the total amount .

- e. Funnel: shows different stages in a process.
34. We will customize it by setting the threshold values “min, middle range, max” amount so that we will be able to know whether we have earned the profit or not. Suppose I have invested 22000\$ in making this festival. And my expectation is I might earn 44000\$ in the festival. This gauge meter show that info, whether the finance manager who is involved in organizing this festival is in crisis or profit.



35. We can also make a filter on a particular festival, suppose if we have more than one festival happening, in order to differentiate between different data source we can create a filter on report page.

Festival: Festival Name	Attendee: Attendee Name	Total money spent	purchaseSource
TomorrowLand	navin	100.00	Official Website
TomorrowLand	shivadeepthi	100.00	FaceBook
TomorrowLand	Louis Yu	150.00	3rd Party Ticket Vendor
TomorrowLand	Brittney Tannehill	150.00	3rd Party Ticket Vendor
TomorrowLand	Beth Hillhouse	50.00	3rd Party Ticket Vendor
TomorrowLand	Jennifer Presswood	100.00	3rd Party Ticket Vendor
TomorrowLand	Leigh Andrew	150.00	3rd Party Ticket Vendor
TomorrowLand	Genaro Brassfield	200.00	3rd Party Ticket Vendor
TomorrowLand	Jamie Genest	50.00	3rd Party Ticket Vendor
TomorrowLand	Carolyn Gridley	100.00	3rd Party Ticket Vendor
TomorrowLand	Jody Maxfield	300.00	3rd Party Ticket Vendor
TomorrowLand	Yanessa Maffettone	150.00	3rd Party Ticket Vendor

36. We can also build charts for “total monthly revenue”, where in we will be grouping on purchase date and ticket type and summarizing the total spent by monthly bases.

Festival: Festival Name	Attendee: Attendee Name	Total money spent	purchaseSource
TomorrowLand		150.00	

totalTickettype ~ salesfor

https://na17.salesforce.com/000o0000002V8O1

Grouped By: purchasedate TicketType
Sorted By: purchasedate > TicketType

Festival: Festival Name	Attendee: Attendee Name	Total money spent	purchaseSource
purchasedate: May 2013 (31 records)			
5,300.00			
TicketType: Full Madness Pass (17 records)			
2,100.00			
TomorrowLand	Kim Clausen	100.00	Official Website
TomorrowLand	Tim Arlnt	200.00	Official Website
TomorrowLand	Wayne Fredrickson	200.00	Official Website
TomorrowLand	Mave Head	50.00	Official Website
TomorrowLand	Dean Sturz	50.00	Official Website
TomorrowLand	Kevin Clark	50.00	Official Website
TomorrowLand	Darlene Hartz	50.00	Official Website
TomorrowLand	Craig Jardine	100.00	Official Website
TomorrowLand	Larry Poulton	150.00	Official Website
TomorrowLand	Jim Thompson	200.00	Official Website
TomorrowLand	Chris Munsteriger	250.00	Official Website
TomorrowLand	Jeff Thomas	250.00	Official Website
TomorrowLand	Steve Boyce	50.00	Official Website
TomorrowLand	Eric Burdette	150.00	Official Website
TomorrowLand	Brian Lossett	100.00	Official Website
TomorrowLand	Dale Blank	50.00	Official Website
TomorrowLand	Michael Campbell	100.00	Official Website
TicketType: Full Madness Pass Comfort (14 records)			
3,200.00			
TomorrowLand	Larry Larry	400.00	Official Website
TomorrowLand	Brandon Grissom	100.00	Official Website
TomorrowLand	Kisha Hendrick	100.00	Official Website

totalTickettype ~ salesfor

https://na17.salesforce.com/000o0000002V8O1/e?retURL=%2F00Oo0000002V8O1

Report Type: Festivals with Attendees

totalTickettype

shivateepthi too... Setup Help FestivalApp

Guided Tour | Video Tutorial | Help for this Page

Save Save As Close Report Properties Add Report Type Run Report

Fields All #

Drag and drop add fields to the report.

Formulas Add Formula

Bucket Fields Add Bucket Field

Festival: Info

- Festival: ID
- Festival: Festival Name
- # capacity
- end_date
- start_date
- # Total_Full Madness Pass
- # Total_Full Madness Pass
- # Total tickets sold
- Festival: Owner Name
- Festival: Owner Alias
- Festival: Owner Role
- Festival: Created By
- Festival: Created Alias
- Festival: Last Modified By
- Festival: Last Modified Alias
- Festival: Last Activity Date

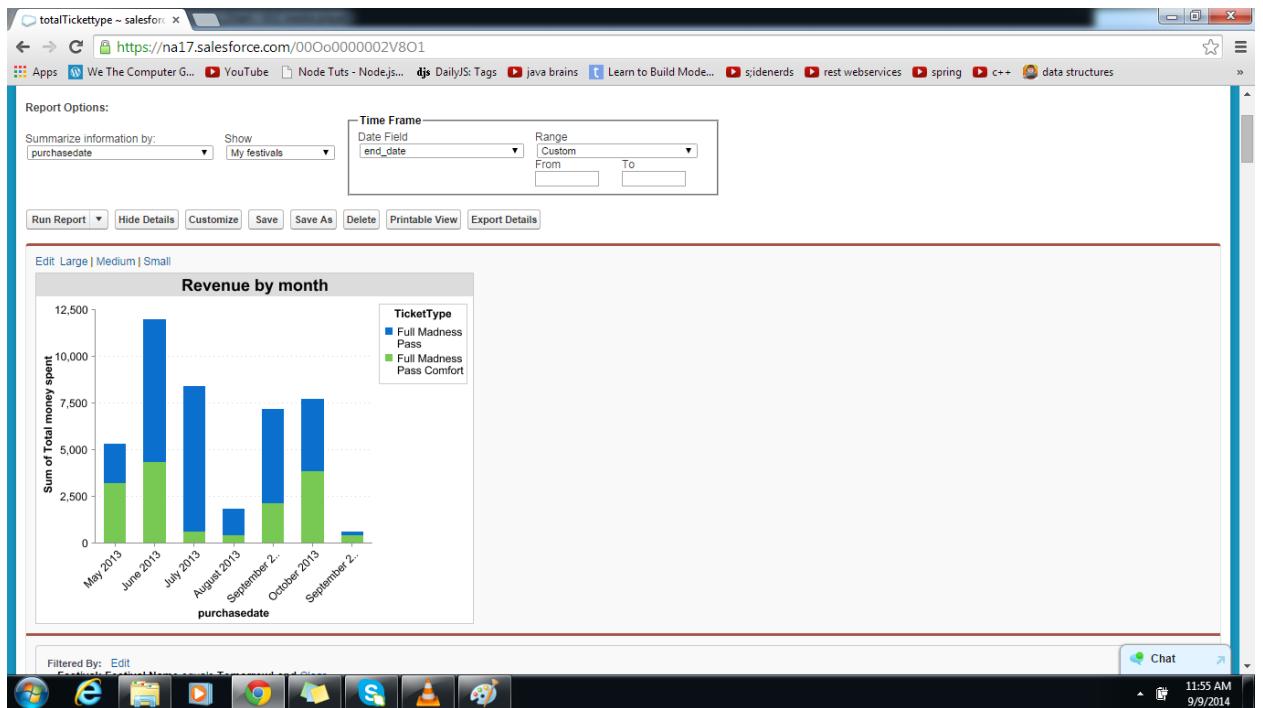
Filters Add Show My festivals

Date Field end_date Range All Time From To

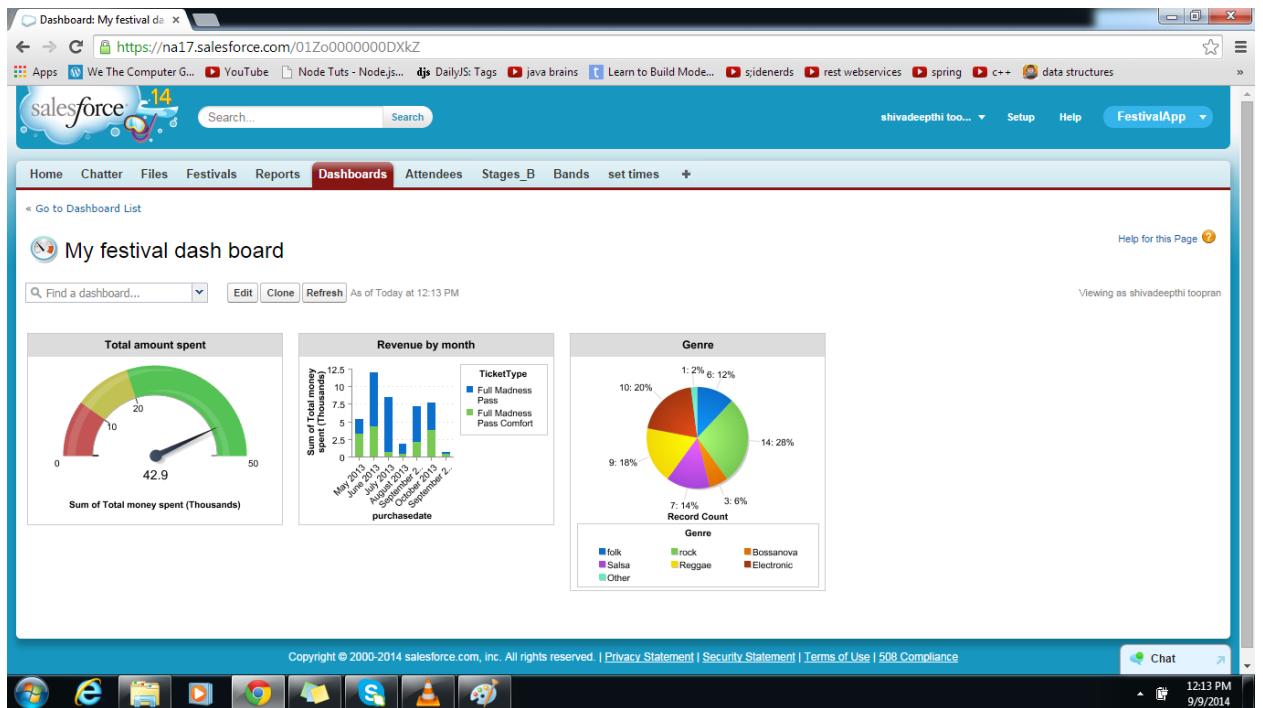
Festival: Festival Name equals "TomorrowLand"

Preview Summary Format Show Add Chart Remove All Columns

Festival: Festival Name	Attendee: Attendee Name	Total money spent	purchaseSource
purchasedate: September 2013 (17 Records)			
2,350.00			
TicketType: Full Madness Pass (17 Records)			
2,350.00			
Drop a field here to create a grouping. Hide			
TomorrowLand	Louis Yu	150.00	3rd Party Ticket Vendor
TomorrowLand	Brittney Tannehill	150.00	3rd Party Ticket Vendor
TomorrowLand	Beth Hillhouse	50.00	3rd Party Ticket Vendor
TomorrowLand	Jennifer Presswood	100.00	3rd Party Ticket Vendor
TomorrowLand	Leigh Andrew	150.00	3rd Party Ticket Vendor
TomorrowLand	Genaro Brassfield	200.00	3rd Party Ticket Vendor
TomorrowLand	Jamie Genest	50.00	3rd Party Ticket Vendor
TomorrowLand	Carolyn Gridley	100.00	3rd Party Ticket Vendor
TomorrowLand	Jody Maxfield	300.00	3rd Party Ticket Vendor



37. We can also build charts from the report page as well. After creating a report we should click on "customize" button to do that. This will allow us to create chart and in order to display it on dash board we need to select the graph and click on the default option i.e, use the report chart from the report page.
38. We build chart "pie graph" for distribution of "genre" in the same way as depicted above. The below shows the overall view in the dashboard.



39. Sales force also provides us the facility to create a new view on the objects created. The only view seen by default is “ALL”. Where it displays all the records present in the object. Suppose we would want to filter our number of bands playing “ROCK” genre. We click on “create view” and set in the formula as shown in the picture below and save it.

Step 1. Enter View Name

View Name: Rock
View Unique Name: Rock

Step 2. Specify Filter Criteria

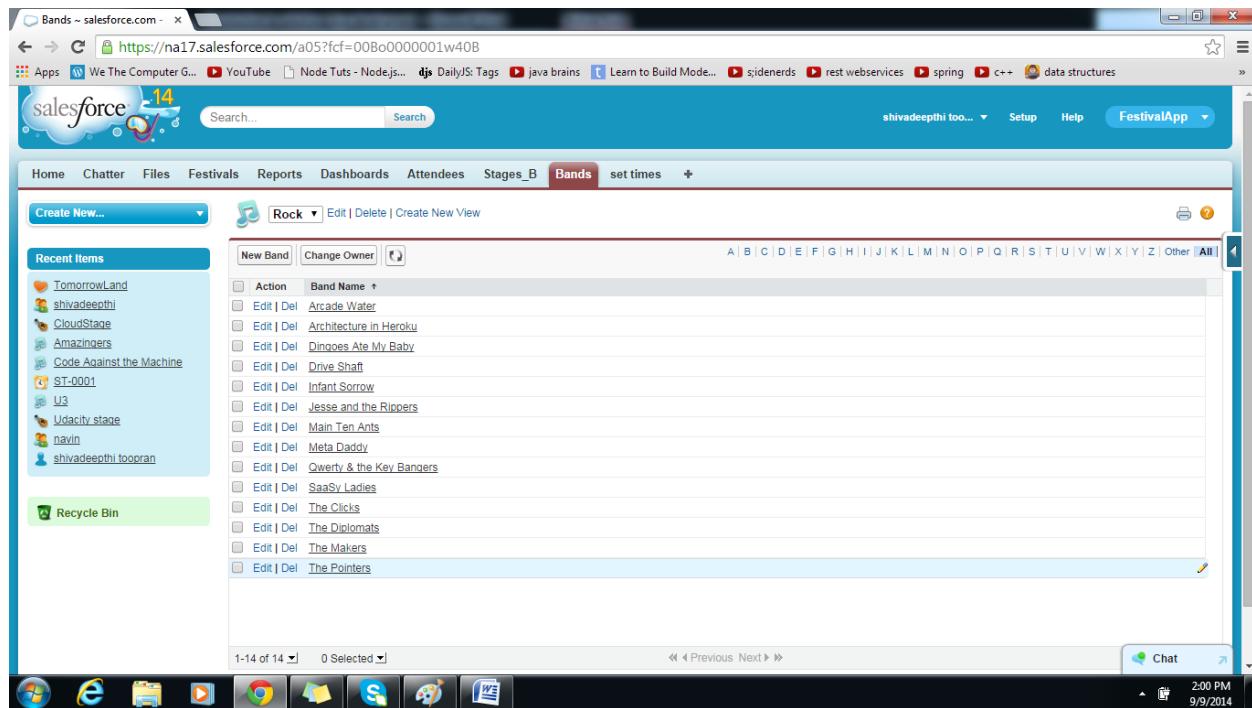
Filter By Owner:
 All Bands
 My Bands

Filter By Additional Fields (Optional):

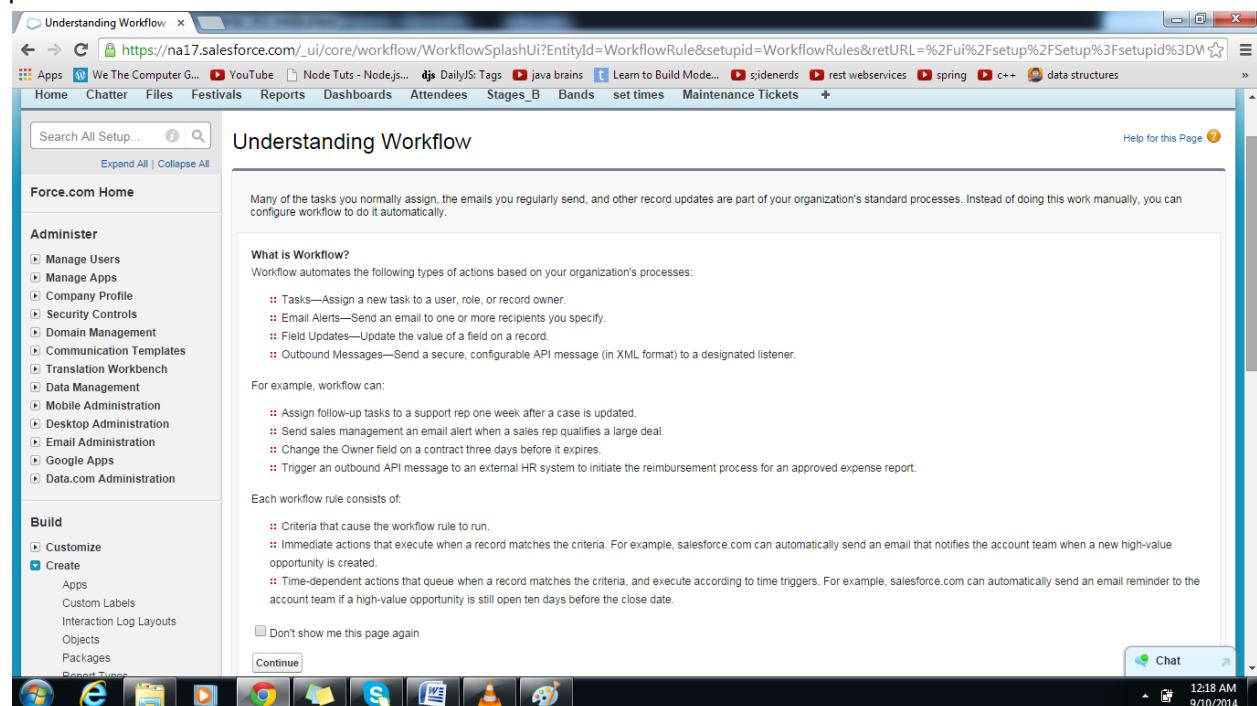
Field	Operator	Value
Genre	equals	Rock
--None--	--None--	

Step 3. Select Fields to Display

Available Fields: Record ID, Genre
Selected Fields: Band Name



40. Sales force not only allows us to build the application statically, it allows us to automate the workflow process by creating few rules. In order to automate any part of our application we have to create a work flow process for each situation. So that when that particular situation is triggered then this work flow will automatically get executed. For eg:
Send an email to a technician when something is not going well in the festival. The technician would automatically receive an email (assigned a task) on which we would be working to fix the problem.



Automation(workflow, Approval Process)

41. In order to create the workflow , Go to->setup->in the search box ->search for “workflow processes”. This takes us to the workflow page, click on continue and select the object we want to create the workflow. We select “Maintenance object” and create the ticket. The fields like ticket name, technician the ticket should go, evaluation criteria (is when this rule should trigger),and rule criteria can be configured.

Force.com Home

Administrator

- Manage Users
- Manage Apps
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Email Administration
- Google Apps
- Data.com Administration

Build

- Customize
- Create**
 - Apps
 - Custom Labels
 - Interaction Log Layouts
 - Objects
 - Packages
 - Report Types
 - Tabs

Object Maintenance Ticket

Rule Name Alert Technician

Description

Evaluation Criteria

Evaluate the rule when a record is:

- created
- created, and every time it's edited
- created, and any time it's edited to subsequently meet criteria [?](#)

How do I choose?

Rule Criteria

Run this rule if the following formula evaluates to true:

Example: `OwnerId <= LastModifiedById` evaluates to true when the person who last modified the record is not the record owner. [More Examples...](#)

Insert Field Insert Operator Functions

... All Function Categories - ABS

Insert Field

Select a field, then click Insert. Labels followed by a ">" indicate that there are more fields available.

Rule

Maintenance Ticket > \$Organization > \$Profile > \$System > \$User > \$UserRole > Last Modified Date Maintenance Ticket Name priority Record ID Stage_B Stage_B > Status Technician name Technician name > Department Division Employee Number End of Day Extension Fax First Name Last Name

You have selected: Technician_name__r.Email

Type: Email API Name: Technician_name__r.Email

Insert

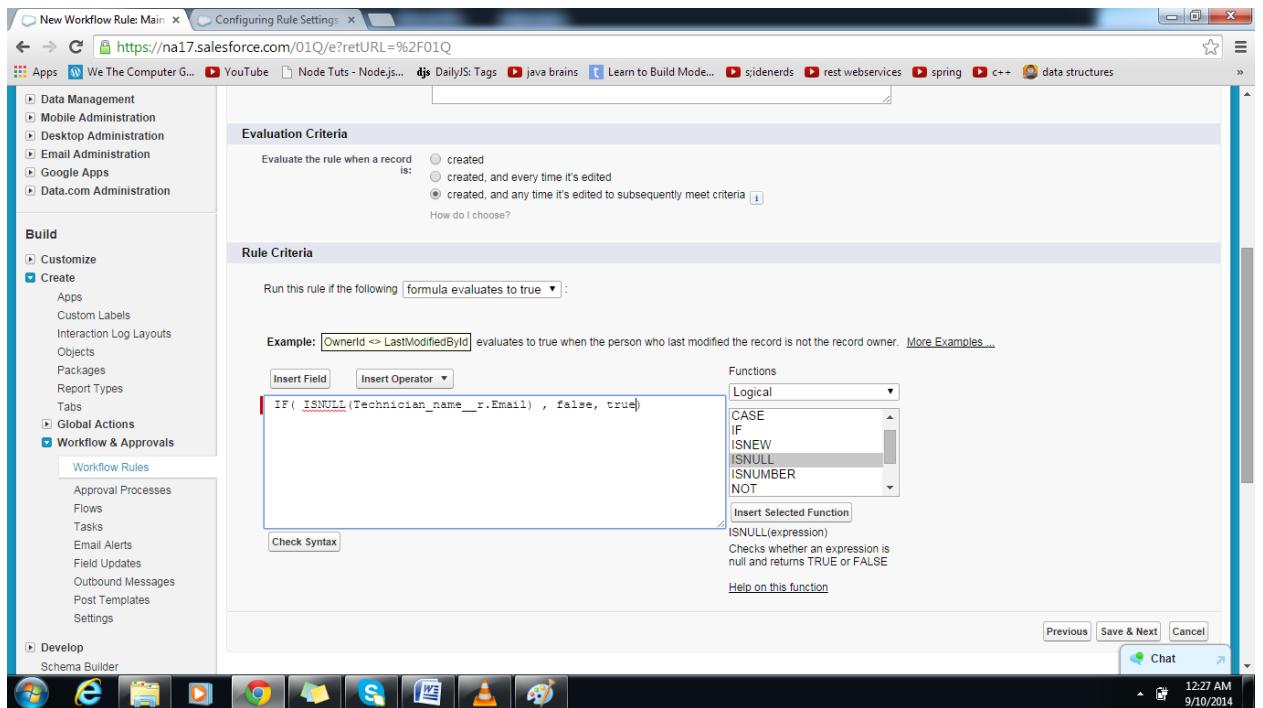
Close

Check Syntax

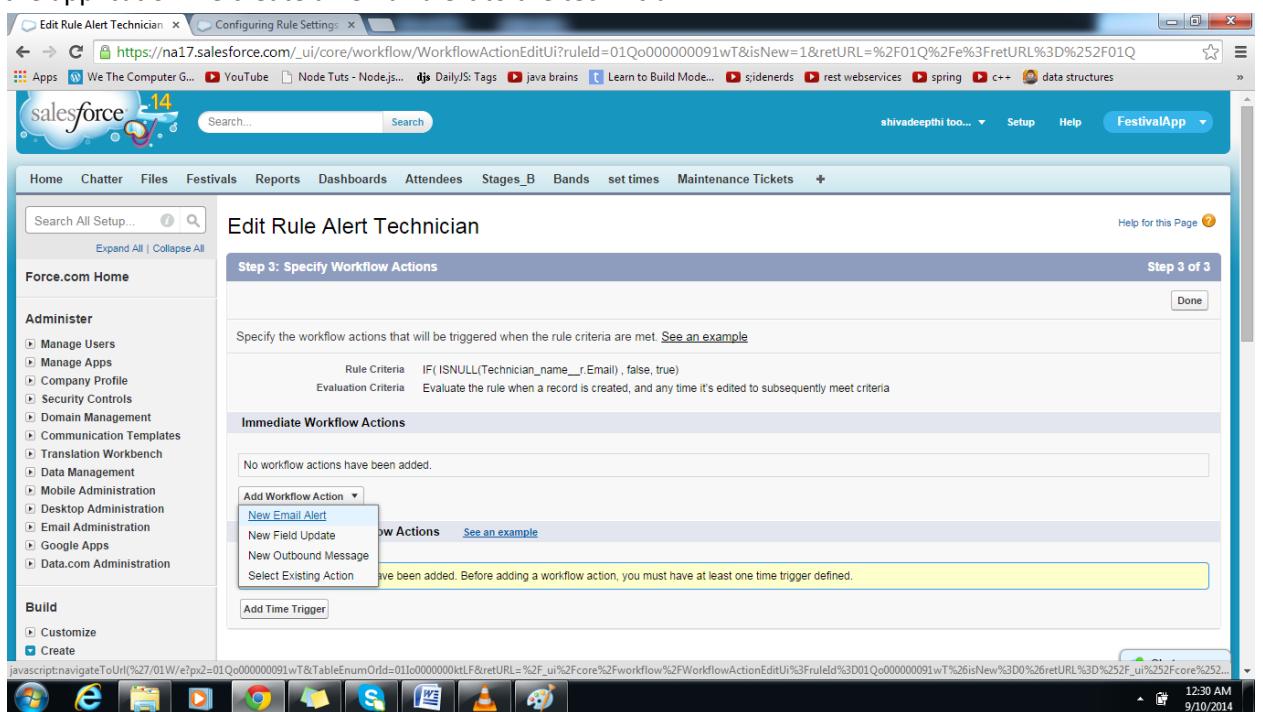
Insert Selected Function

12:23 AM 9/10/2014

12:24 AM 9/10/2014



42. After creating the rule criteria and evaluation criteria, we should configure the workflow action. Action means when certain set of rules gets satisfied what kind of action, you want to create to notify the user the ticket is created. We can notify by creating an email, field update etc. Here in the application we create an email alert to the technician.



Email Alert Edit

Description: Email technician

Unique Name: Email_technician

Object: Maintenance Ticket

Email Template: Support: Escalated Case No

Recipient Type: Related User

Recipients: Available Recipients (Related User: Last Modified By) and Selected Recipients (Related User: Technician name)

Edit Rule Alert Technician

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria: IF(ISNULL(Technician_name__r.Email) , false, true)

Evaluation Criteria: Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

Action	Type	Description
Edit Remove	Email Alert	Email technician

Time-Dependent Workflow Actions [See an example](#)

No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

Add Time Trigger

43. But In order to start tracking the work flow process we have to activate it by clicking on "activate" button. Now in order to track on an object, we have to edit the object definition by checking in "allow activities" and "allow tracking" options.

set times: Home ~ salesfo Maintenance Tickets: Hon Maintenance Ticket: MT-0100

https://na17.salesforce.com/a0700000001B1Eo

Apps We The Computer G... YouTube Node Tuts - Node.js... djs DailyJS: Tags java brains Learn to Build Mode... sjidenerds rest webservices spring c++ data structures

salesforce 14

Search... Search

shivadeepthi foo... Setup Help FestivalApp

Home Chatter Files Festivals Reports Dashboards Attendees Stages_B Bands set times Maintenance Tickets +

Create New... Recent Items

Maintenance Ticket MT-0100

Back to List: Custom Object Definitions

Maintenance Ticket Detail

Maintenance Ticket Name	MT-0100	Edit Delete Clone
priority	High	
Technician name	shivadeepthi tooran	
Stage_B	Udacity stage	
Description	Every thing is broken	
Status	New	
Created By	shivadeepthi tooran, 9/10/2014 12:41 AM	Last Modified By shivadeepthi tooran, 9/10/2014 12:41 AM

[Edit](#) [Delete](#) [Clone](#)

Recycle Bin

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set times: Home ~ salesfo Maintenance Tickets: Hon Edit Custom Object: Main Related lists under Lesson

https://na17.salesforce.com/01Io0000000ktLF/e?setupid=CustomObjects&retURL=%2F01Io0000000ktLF%3Fsetupid%3DCustomObjects

Apps We The Computer G... YouTube Node Tuts - Node.js... djs DailyJS: Tags java brains Learn to Build Mode... sjidenerds rest webservices spring c++ data structures

Chat 12:41 AM 9/10/2014

Google Apps Data.com Administration

Build

- Customize
- Create
 - Apps
 - Custom Labels
 - Interaction Log Layouts
 - Objects
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 - Report Types
 - Tabs
 - Global Actions
 - Workflow & Approvals

Develop

- Schema Builder
- Canvas App Previewer
- Installed Packages
- AppExchange Marketplace
- Critical Updates

Deploy

- Deployment Status

Monitor

- System Overview
- Imports
- Outbound Messages

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

Data Type Display Format Example: A-(0000) [What Is This?](#)

Optional Features

- Allow Reports
- Allow Activities
- Track Field History

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

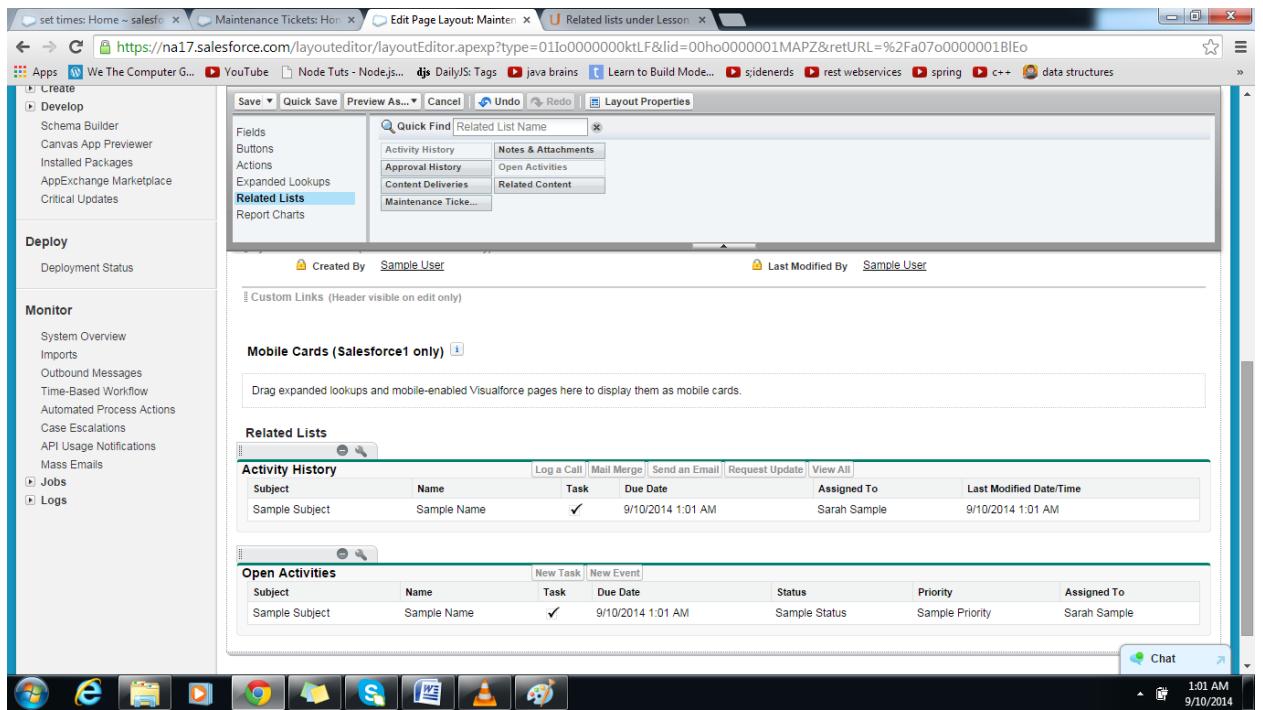
Deployment Status

[What Is This?](#)

In Development

Deployed

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44. In order to show up the activity history and open activities lists on “maintenance ticket”, we need to edit our layout and drag-drop the activity history and open activities details so that user can see what are all his tickets completed and pending.
45. We can also have approval process in our application. It works same as workflow process but it involves in stamping the approval from the manager etc that kind of interaction in order to complete the cycle. We do approve process for ‘Set_time’. Where this is a junction object. Suppose an agent manager (band) comes and want to book a stage at particular time. Then this process has to go to this approval process by the stage manager in order to allow that band performing on that stage at a particular time. Stage manager can only approve if he doesn’t have any event performing at that time slot which had been asked.
46. To Create an approval process go to setup->search for approval processes->select jump start wizard and fill in the details for approval process.

Approvals are complex business processes that require information gathering and planning before implementing. It is recommended that you follow the instructions below before getting started.

1. Read the help topic
2. View the checklist
3. Create a custom user hierarchical relationship field
4. Create email templates
5. Create an approval process using either the Jump Start or Standard Wizard
6. Add Approval History Related List to all page layouts
7. Activate the process to deploy to your users

Manage Approval Processes For: Set time

A listing of both active and inactive approval processes for **set times** is displayed below. To create a new approval process, click **Create New Approval Process** then select **Use Jump Start Wizard** to set up your approval process in a few short steps. Or, select **Use Standard Wizard** to configure all approval options.

Create New Approval Process

Active Approval Processes

No approval processes available

Inactive Approval Processes

No approval processes available

47. Fill in the approval process information, specify the entry criteria i.e., if the rule specified there gets satisfied that approval process is created for that item. Here we configure that the set time's object time should not be null i.e. when user wants an approval process to be created the field (time) in "set_time" should not be null. And the approver could be anyone in the organization. Here we select automatically assign the approver option.

The screenshots show the 'Approval Process Jump Start' wizard in the Salesforce interface. The top screenshot is the 'Approval Process Information' step, where you can name the process (e.g., 'Stage manager approval') and set an approval assignment email template. The bottom screenshot is the 'Select Approver' step, where you can choose to let the submitter choose the approver manually or automatically assign an approver using a standard or custom hierarchy field. Both screenshots show a table for specifying entry criteria, which in the bottom screenshot is populated with 'Set time: time' and 'not equal to' conditions.

48. We can configure the steps or stages in the approval process i.e. approval information is set up, there are few steps that automatically gets executed. So ,in sales force we will be able to configure those steps as shown below.

- When a record is first created its status will be new, we user sends that for approval process, the status should be change to “ interview” .This is configured as shown below

Field Update Detail

Name	Unique Name	Description	Object	Field to Update	Field Data Type
Change status to in review	Change_status_to_in_review	Set time	Set time	Status	Picklist

Rules Using This Field Update

This field update is currently not used by any rules

Approval Processes Using This Field Update

Action	Approval Process Name	Description	Type	State
Edit Del	Stage manager approval	Set time	Set time	Inactive

- b. Similarly in order to change the status from “ interview”, “cancelled”, “new”, we have to configure in approval steps, final approval action, final rejection action and recall action respectively.

Initial Submission Actions

Action	Type	Description
Record Lock	Lock the record from being edited	
Edit Remove	Field Update	Change status to in review

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit	1	Step 1			User:shivadeepthi_toorap	Final Rejection

Final Approval Actions

Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit Remove	Field Update	change status to confirmed

Final Rejection Actions

Action	Type	Description
Edit	Record Lock	Unlock the record for editing
Edit Remove	Field Update	change status to cancelled

Recall Actions

Action	Type	Description
Edit	Record Lock	Unlock the record for editing
Edit Remove	Field Update	change status to new

12:03 PM 9/10/2014

12:04 PM 9/10/2014

49. Now to go set_time tab, create a new record and “click on approval request”. This creates a pending decision on the case and status will change to “in review”. When user who is responsible to approve the case accepts it, the status changes from “in review” to “confirmed” status.

Minning The Social Web 2 | set times: Home ~ salesfo | Set time: ST-0002 ~ salesfo | Maintenance Ticket: MT-0002

https://na17.salesforce.com/a0600000001bRpm

Apps We The Computer G... YouTube Node Tuts - Node.js... djs DailyJS: Tags java brains Learn to Build Mode... sjdeners rest webservices spring c++ data structures

Home Chatter Files Festivals Reports Dashboards Attendees Stages_B Bands **set times** Maintenance Tickets +

Create New... Set time ST-0002

Recent Items ST-0002 Amazingers MT-0100 MT-0101 Udacity stage MT-0102 ST-0001 CloudStage TomorrowLand shivadeepthi

Recycle Bin

Set time Detail

Set time Name	ST-0002
time	9/10/2014 12:06 PM
Status	In review
Stage_B	Udacity stage
Band	Amazingers
Created By	shivadeepthi toopran, 9/10/2014 11:38 AM
Last Modified By	shivadeepthi toopran, 9/10/2014 12:06 PM

Bands | Approval History

Unlock Record Edit Delete Clone

Bands New Band Bands Help

No records to display

Approval History Recall Approval Request

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Step 1 (Pending for first approval)						Pending
Reassign / Approve / Reject	9/10/2014 12:06 PM	Pending	shivadeepthi toopran	shivadeepthi toopran		
Approval Request Submitted						
	9/10/2014 12:06 PM	Submitted	shivadeepthi toopran	shivadeepthi toopran		

Back To Top Always show me more records per related list Chat 12:07 PM 9/10/2014

Mining The Social Web 2 | set times: Home ~ salesfo | Approval Request: Set time: ST-0002 | Maintenance Ticket: MT-0002

https://na17.salesforce.com/p/process/ProcessInstanceWorkitemWizardStageManager?id=04i000000000000DqR

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salesforce 14 Search... Search shivadeepthi toopran Setup Help FestivalApp

Home Chatter Files Festivals Reports Dashboards Attendees Stages_B Bands **set times** Maintenance Tickets +

Create New... Set time: ST-0002

Recent Items ST-0002 Amazingers MT-0100 MT-0101 Udacity stage MT-0102 ST-0001 CloudStage TomorrowLand shivadeepthi

Recycle Bin

Approve/Reject Approval Request

Set time Name	ST-0002
Comments	Looks good

Approve Reject Cancel

Approval History Approval History Help

Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Step 1 (Pending for first approval)					Pending
9/10/2014 12:06 PM	Pending	shivadeepthi toopran	shivadeepthi toopran		
Approval Request Submitted					
9/10/2014 12:06 PM	Submitted	shivadeepthi toopran	shivadeepthi toopran		

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Set time ST-0002

Recent Items

- ST-0002
- Amazingers
- MT-0100
- MT-0101
- Udacity stage
- MT-0102
- ST-0001
- CloudStage
- TomorrowLand
- shivadeepthi

Bands

Approval History

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Step 1	9/10/2014 12:08 PM	Approved	shivadeepthi tooran	shivadeepthi tooran	Looks good	Approved

Make it Social (chatter feeds ,move it onto mobile)

50. Since there are many people using the application at the same time? It's very difficult to collaborate or communicate to each of them. In order to overcome such difficulty sales force provides us with a chatter feed , where in people can post, follow etc to get updated on the changes happening to a object. Select the object and field we want to track by navigating to chatter page.

Feed Tracking

Asset

Fields in stages_B

Field	Value
Crowd capacity	<input checked="" type="checkbox"/>
Festival	<input type="checkbox"/>
Main Stage	<input type="checkbox"/>
Stage manager	<input checked="" type="checkbox"/>
Equipment Available	<input type="checkbox"/>
Has Piano	<input type="checkbox"/>
Stage Name	<input type="checkbox"/>

You can also display feed activity for related objects.

Stage_B Udacity stage

Recent Items

- Udacity stage
- MT-0100
- Amazingers
- ST-0002
- MT-0101
- MT-0102
- ST-0001
- CloudStage
- TomorrowLand
- shivadeepthi

Recycle Bin

Stage_B Detail

Stage Name: Udacity stage

set times

Chatter

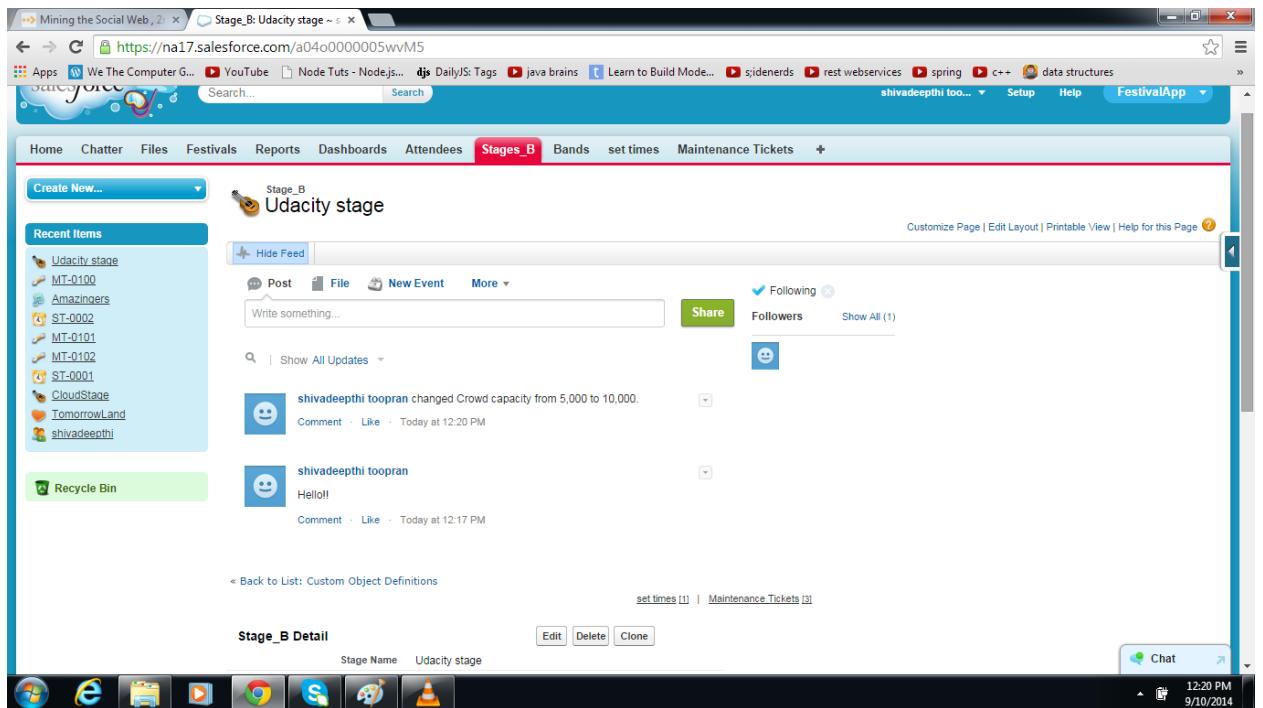
Recent Items

- Udacity stage
- MT-0100
- Amazingers
- ST-0002
- MT-0101
- MT-0102
- ST-0001
- CloudStage
- TomorrowLand
- shivadeepthi

Recycle Bin

Calendar

51. So when anyone who is working with stage object changes a field, this gets posted on to the chatter feed. This helps other people to get updated.



52. We can also create few actions from the page. If the page(object) on which we want to create is master then, we will be able to create a record of a child table from here itself. For that we must go to edit object definition page->scroll to “button actions and links” section and create a “New action”. We can create different kinds of publisher actions, like log a call, update record etc.

The image consists of two screenshots of the Salesforce developer console, both titled "Action: Create a new time".

Screenshot 1 (Top): Enter Action Information

This screenshot shows the "Enter Action Information" form. The "Object Name" is set to "Stage_B". The "Action Type" is "Create a Record". The "Target Object" is "Set time". The "Label" is "Create a new time". The "Name" is "Create_a_new_time". The "Description" field is empty. The "Icon" is a standard icon. The "Save" and "Cancel" buttons are at the bottom.

Screenshot 2 (Bottom): Set time Fields

This screenshot shows the "Set time Fields" configuration. The "Field Name" is "time". The "Blank Space" field is empty. The "Band" field is empty. The "Stage_B" field is empty. The "Status" field is empty. The "Status" field is highlighted in blue. The "Stage_B" field is marked with a red asterisk. The "Band" field is marked with a red asterisk. The "time" field is marked with a red asterisk. The "9/10/2014 12:31 PM" value is displayed in the "time" field.

53. Now In order to show that on the chatter feed, need to edit out layout, select actions->select the action created ,and select the field which we want display. Drag and drop them on to publisher actions section.

Minin the Social Web 2 Stage_B: Udacity stage ~ Edit Page Layout: Stage_B

https://na17.salesforce.com/layoutEditor/layoutEditor.apexp?type=01o0000000kn3K&lid=00h00000001LxF3&retURL=%2F01o0000000kn3K%3Fsetupid%3DCustomObj

Custom Console Components Mini Page Layout Mini Console View | Video Tutorial Help for this Page

Home Chatter Files Festivals Reports Dashboards Attendees Stages_B Bands set times Maintenance Tickets +

Search All Setup... Expand All | Collapse All

Force.com Home

Administrator

- Manage Users
- Manage Apps
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Email Administration
- Google Apps
- Data.com Administration

Build

- Customize
- Create
- Apps

Actions

Quick Find	Action Name
Create a new time	Mobile Smart Actions
File	New Event
Link	New Group
Log a Call	New Lead
	Poll
	New Contact
	New Note
	Post

Stage_B Sample

Highlights Panel

Customize the highlights panel for this page layout.

Publisher Actions

Post Create a new time File Mobile Smart Actions Link Poll

Stage_B Detail

Standard Buttons Edit Delete Clone Custom Buttons

Information (Header visible on edit only)

Stage Name Sample Stage Name

12:57 PM 9/10/2014

Minin the Social Web 2 Stage_B: Udacity stage ~

https://na17.salesforce.com/a04o0000005wvM5

Customize Page | Edit Layout | Printable View | Help for this Page

Home Chatter Files Festivals Reports Dashboards Attendees Stages_B Bands set times Maintenance Tickets +

Create New...

Recent Items

- Udacity stage
- MT-0100
- Amazingers
- ST-0002
- MT-0101
- MT-0102
- ST-0001
- CloudStage
- TomorrowLand
- shivadeepthi

Recycle Bin

Stage_B Udacity stage

Post Create a new... File More

Status

Stage_B

Band

time

Following

Followers Show All (1)

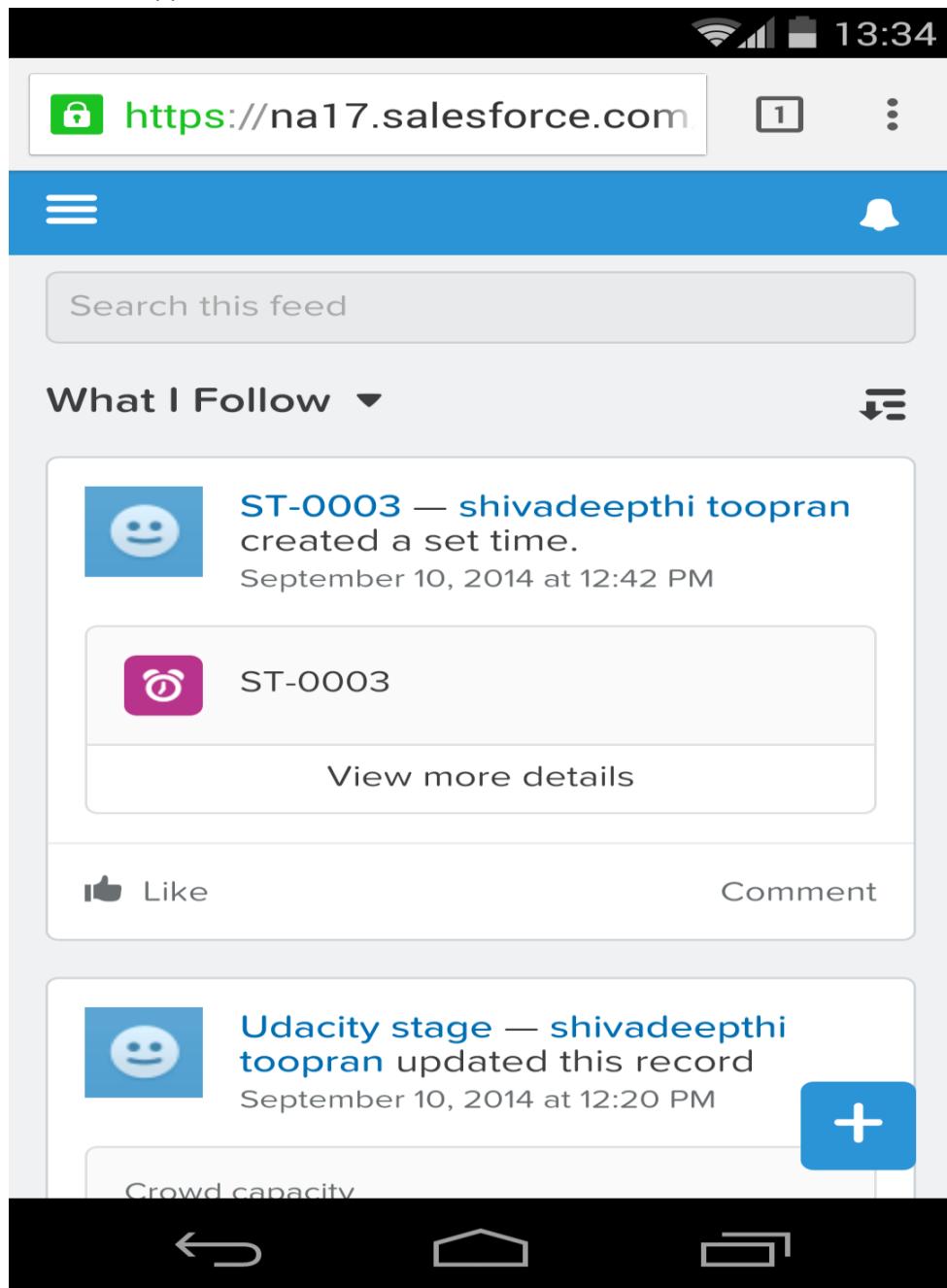
Create

12:42 PM 9/10/2014

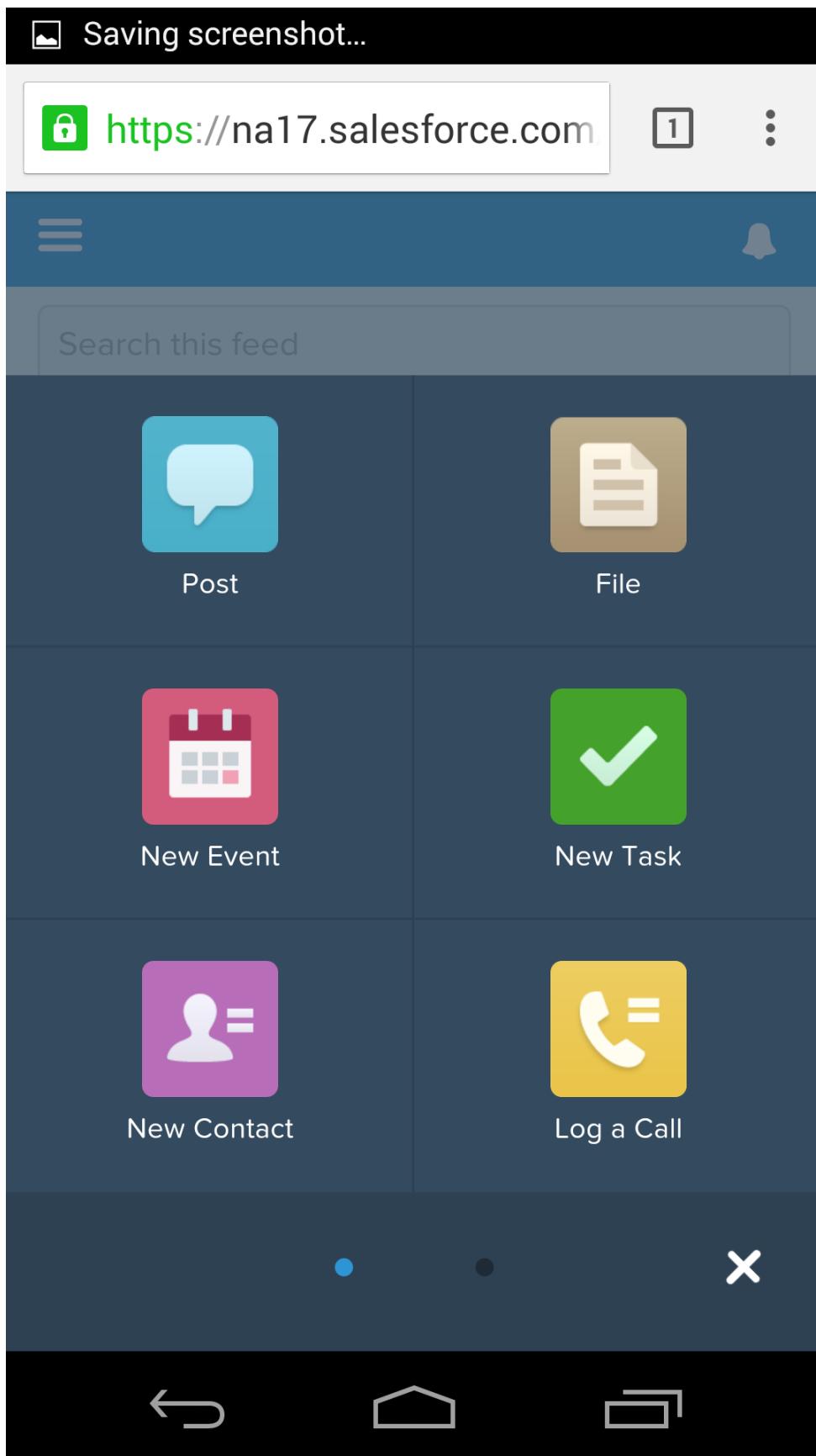
54. Below is the final schema of the festival app.

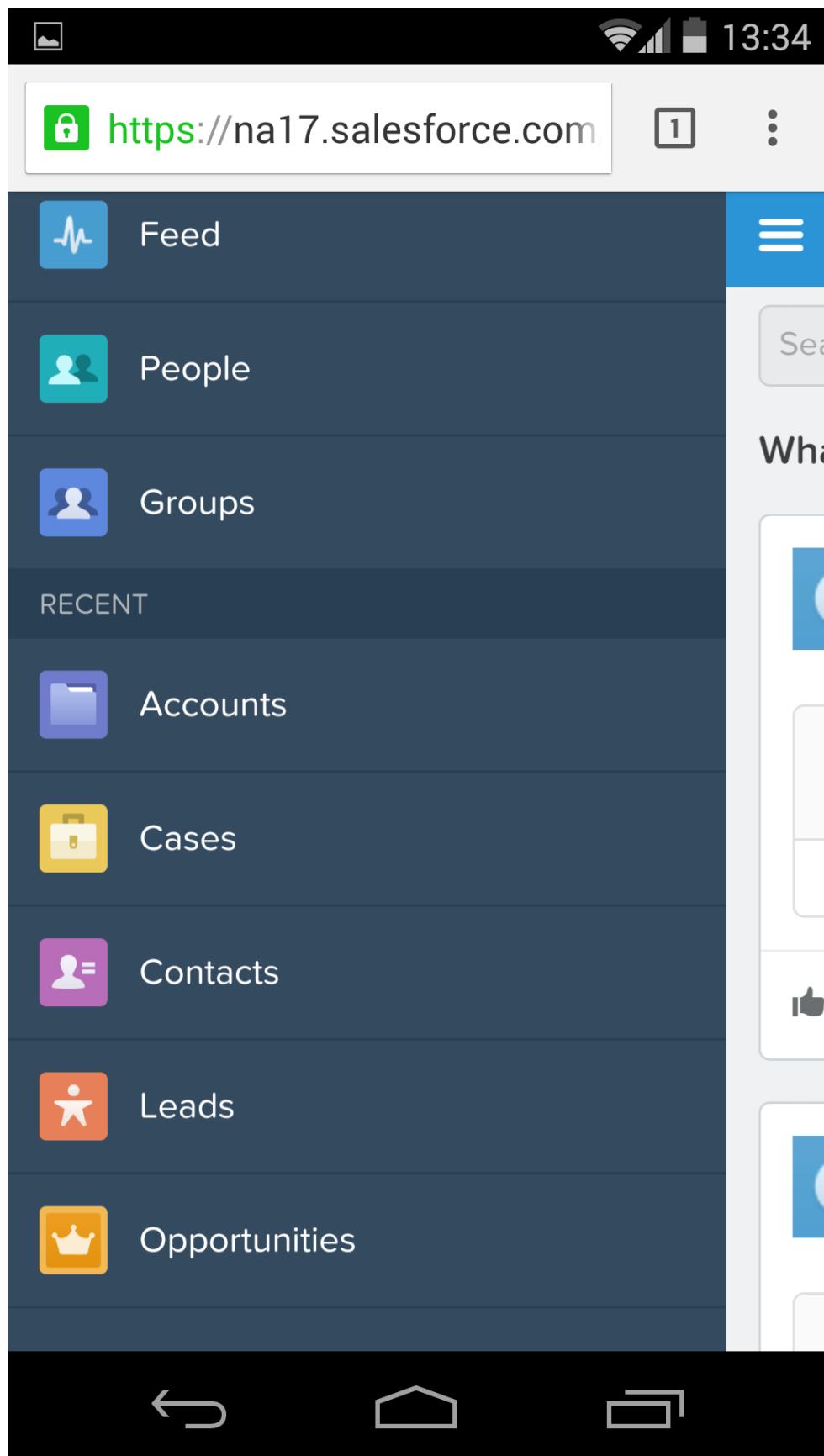
55. Sales force not only allows us to build the application on console, but all the previously mentioned steps will also help us creating a mobile app parallel. So the festival app created can also be viewed on the mobile.

56. On our mobile by just <https://na17.salesforce.com/one/one.App> we will be able to view/access our festival application on mobile also.



📷 Saving screenshot...





The image shows a screenshot of the Salesforce mobile application running on an Android device. The top status bar is black with white icons for signal strength, battery level, and the time (13:34). Below the status bar is a white header bar containing a green padlock icon, the URL <https://na17.salesforce.com>, a small icon with the number '1', and a vertical ellipsis icon.

The main content area has a dark blue header with a light blue vertical bar on the right containing a white three-line menu icon. Below the header is a search bar with the placeholder text 'Search' and a 'What's New' section with a blue header and a blurred image.

The main menu is a list of items with icons and labels:

- Feed (blue icon)
- People (teal icon)
- Groups (blue icon)
- RECENT (light blue header)
- Accounts (purple folder icon)
- Cases (yellow briefcase icon)
- Contacts (pink person icon)
- Leads (orange person icon)
- Opportunities (orange crown icon)

At the bottom of the screen are three white navigation icons: a left arrow, a house (Home), and a square (Recent/Recent).

 Saving screenshot...



<https://na17.salesforce.com>

1



Show More

APPS



Tasks



Dashboards



Events



shivadeepthi toopran



Help



Full Site



Logout



https://na17.salesforce.com

1

...

What's new

shivadeepthi toopran requested approval for this set time: ST-0002

September 10, 2014 12:06 PM

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Recent apps