

# Salesforce Components – necessary to understand before start development

## Components Type

Salesforce basics tutorials are essentials to know before we are going to salesforce.com main concepts. Let we discuss about the menus that are available when we logged in to [salesforce.com](https://salesforce.com). Below we have given screenshot here we find all menu available. After logging in to your free developer account([salesforce login](https://salesforce.com/login)) we observe some menu. They are listed below

1. **TAB Menu.**
2. **All TAB Menu.**
3. **More TAB Menu.**
4. **User Menu.**
5. **Setup Menu.**
6. **Application Menu.**
7. **Search Menu.**

**TAB MENU** : In TAB Menu all tabs are arranged in a row. Here we can arrange TABs that we created.

**ALL TAB MENU** : In All Tabs Menu we find all Tabs available in salesforce.com. Through all Tabs menu we can add our custom tab to TAB Menu.

**MORE TAB MENU** : In more tabs we can find more Tabs available in salesforce.com.

**USER MENU** : User menu is available at the top with username. In User menu we can change our profile settings, my settings. To log out from account click your Account name .

**APPLICATION MENU** : Application menu is shown at the top right listing the set of applications. This menu allows to shuffle between the applications. Please observe some of the pre built applications available in salesforce.com. With free account salesforce.com has some sample applications with some sample data and implementations.

**SEARCH MENU** : Search menu help to search in salesforce.com.

**SIDEBAR MENU** : Inside bar menu we have different sections like Administrations, Build, Monitor, jobs, logs.

## **Data Type**

**Data types and field types in sfdc** :In this tutorial we are going to know about **What are the different data types, Different types of Field types**. In General both **data types and field types** have the same names in the user names. We use different Data types depending on the condition.

Generally in API there are 5 different data types. They are

1. ID.
2. String.
3. Boolean.
4. Double.
5. Varies by type

We can group **different field types depending on the Data types.**

ID	Look up relationship, master-detail relationship
String	Auto number, email, phone, multi select pick list, text, text area, long text area, rich text area, data category group reference and URL
Boolean	Check box
Double	Currency, Formula, number, percent and roll-up summary.
Varies by type	Formula Field

## Different Field Types

**Auto number** : when auto number data types is selected a system-generated sequence number that uses a certain display format that we define. Auto generated number will be increment for every record we create.

**Formula** : When Formula data type is selected we are able to derive different Formula expressions that derives values. The formula field is updated every time when there is a change in source field. It is a read-only field type.

**Roll-up Summary** : Roll-up Summary is also a read-only field type. By using this Roll-up Summary data types we are able to make some mathematical calculations like Sum, Minimum, Maximum values of a field in a related list or the record count of all records listed in a related list.

**Lookup Relationship** : This type of Data type links two objects. we can link on object to another object by Lookup relationship. This data type field allows user to select a value from popup list.

**Master-detail relationship** : Master-detail relationship also links two objects but it creates a special type of parent-child relationship between the two objects.

**Checkbox** : If a user wants boolean function like true or false this Checkbox data types is used.

**Currency** : Currency field type allows user to enter INR or any other country currency values in the record.

**Date** : Allows user to enter date or we can select the date from popup calendar.

**Date/ time** : Date and Date/Time field types are different from each other. In Date/Time the user can select date from popup calendar and also current time is entered in the Date/Time field.

**Email** : Allows users to enter Email address.

**Geolocation** : Allows users to enter altitude and longitude values.

**Number** : Allows users to enter numbers.

**Percent** : Automatically percentage sign is added .

**Phone** : Allows users to enter Phone Number.

**Picklist** : Allows users to select only on list from a group of lists that we defined.  
Picking one among many.

**Text** : Allows users to enter combination of both letters and numbers.

**Text Area** : Allows users to enter up to 255 characters of letters and numbers.

**Text area (Long)** : Allows users to enter up to 32,768 characters on separate lines.

**Text Area (Rich)** : Allows users to enter formatted text, add images and links up to 32,768 characters on separate lines.

**Text(Encrypted)** : Allows users to enter any combination of letters an numbers and store them in encrypted format.

**URL** : Allows users to enter a valid website address.

Picklist (multi-select) : Allows users to select many from a group of list that we defined

## Custom Objects

**Salesforce Objects** :- In this [salesforce tutorial](#) we are going to know **how to create Custom object in salesforce** and also we came to know about different types of objects in salesforce. Creating objects in Salesforce is the very first thing we do after creating salesforce.com account.

### **What is Salesforce object ?**

An Objects is represented as a database table which stores organization data .

**Objects** consists of set of **fields** and we store data against that field. To view data

**Salesforce** provided **TABS**.

Salesforce Objects types

- **Standard Objects.**
  
- **Custom Objects**

**Standard Objects** : Standard Objects are those which are created by Salesforce. We can use these standard objects automatically. Example :- Accounts, contacts, chatter, Leads etc.

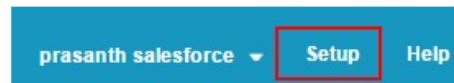
**Custom Objects** : Salesforce Custom objects are those which are created by user. We can create any number of custom objects. Example :- Student info, college etc.

## Creating Custom object in salesforce.

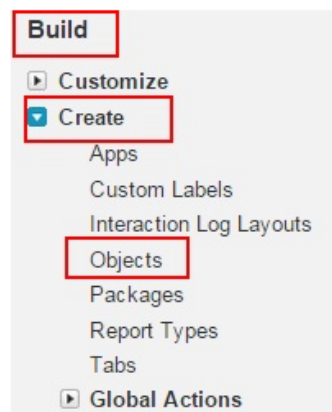
1. Go to **Setup Menu**.
2. **Configuration** (Available on Side Bar).
3. Now go to **Build** section.
4. Go to **create**.
5. Select **Objects**.

Now we are going to create a **custom object** called “**Student**”. Enter all the details as shown below screenshots.

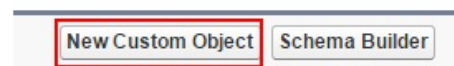
- Go to **Setup** menu



- Now go to **configuration** which is available on side bar. Then go to **Build** => **Create** => **Objects**.



In the right side of the window we will observe a button called “**new custom object**”. Click on that button which allows to create a **new custom object in salesforce**.



Enter all the details given below. **Label name** is given as **Student**. **Plural name** is given as **Students**. This Plural name is used in other cases. We will discuss about this in further articles.



## Custom Object Definition Edit

Save

Save & New

Cancel

### Custom Object Information

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

Label SalesforceTutorial

Example: Account

Plural Label SalesforceTutorials

Example: Accounts

Starts with  
vowel  
sound ☐

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

Object Name SalesforceTutorial

Example: Account

Description

Context-  
Sensitive  
Help  
Setting

- ☒ Open the standard Salesforce.com Help & Training window  
☐ Open a window using a Visualforce page

Content  
Name

--None--

**Record name** will be automatically generated as given for label name. And next option is to select **data type**. In object creation we are having to Data types. **1) Text**  
**2) Auto number**. In our next article we can find clear details on **data types**.

**Enter Record Name Label and Format**

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

Record Name

SalesforceTutorial Name

Example: Account Name

Data Type

Text

**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 disabled, it is classified as a Light Application object. [Learn more.](#)

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

**Deployment Status**

☐ In Development  
☒ Deployed

**Object Creation Options (Available only when custom object is first created)**

☒ Add Notes and Attachments related list to default page layout  
☐ Launch New Custom Tab Wizard after saving this custom object

Chat

## Optional Features.

In optional feature section we have three options they are **Allow Reports, All Activities, Allow track field history**. During object creation only we have to select these 3 option later on object creation we are not able set those features to a object.

- Click **Save** .

Now we are taken to new screen which is shown similar to above screenshot. Here we can find **Custom object details**. These are the details what we have given during **object creation**. We find a field called “**API name**“. Any **custom object or custom fields API names** are “**suffixed**” with **\_\_c**. It is an easier way to identify the difference between **Standard Object and Custom object**.

Custom Object
[Help for this Page](#)

[Standard Fields \[4\]](#) | [Custom Fields & Relationships \[0\]](#) | [Validation Rules \[0\]](#) | [Page Layouts \[1\]](#) | [Field Sets \[0\]](#) | [Compact Layouts \[1\]](#) | [Search Layouts \[4\]](#) | [Buttons, Links, and Actions \[0\]](#) | [Record Types \[0\]](#) | [Apex Sharing Reasons \[0\]](#) | [Apex Sharing Recalculation \[0\]](#) | [Object Limits \[10\]](#)

Custom Object Definition Detail

Edit
Delete
Truncate

Singular Label	SalesforceTutorial	Description		
Plural Label	SalesforceTutorials	Enable Reports	✓	
Object Name	SalesforceTutorial	Track Activities	✓	
API Name	SalesforceTutorial__c	Allow Sharing	✓	
		Allow Bulk API Access	✓	
		Allow Streaming API Access	✓	
		Track Field History	✓	
		Deployment Status	Deployed	
		Help Settings	Standard salesforce.com Help Window	
Created By	<a href="#">prasanth.salesforce</a> 11/17/2014 5:53 PM		Modified By	<a href="#">prasanth.salesforce</a> 11/17/2014 5:53 PM

Salesforce Objects

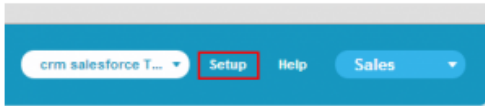
**And also we observe Standard fields like Created By, Last modified by, owner, Name. These are the 4 Standard fields in a Custom Object.**

## Custom Fields

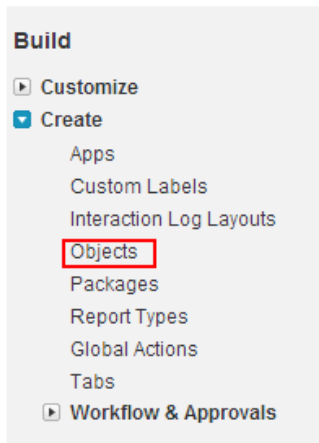
**How to create custom fields in Salesforce :** In this tutorial we are going to study about how to create custom fields in an Custom object. To create custom fields we have to create Custom objects already. In our previous article we studied how to create Custom object in salesforce. And now we are creating custom fields in Student Object.

- **Father name.**
- **DOB.**
- **Address.**
- **Phone**
- **E-mail.**
- **Fee Paid.**
- **Subject S1 marks**
- **Subject S2 marks.**
- **Subject S3 marks.**

To create fields in an Custom object go to Setup Menu



Build = > Create = > Objects



No select the objects in which you the custom fields you want to create.

New Custom Object Schema Builder				
Action	Label	Master Object	Deployed	Description
<a href="#">Edit</a>   <a href="#">Del</a>	<b>Student</b>		✓	

Now go to Custom fields & Relationships Section and select New.

**Custom Fields & Relationships**
New
Field Dependencies
Set History Tracking

No custom fields defined

We are going to create fields in Student objects which are listed below.

1. We are creating Father Name field. To create Father name field we have to select data type. For Father Name we are selecting Text data type.

☒ Text
 

Allows users to enter any combination of letters and numbers.

☐ Text Area
 

Allows users to enter up to 255 characters on separate lines.

☐ Text Area (Long)
 

Allows users to enter up to 32,768 characters on separate lines.

☐ Text Area (Rich)
 

Allows users to enter formatted text, add images and links. Up to 32,768 characters on separate lines.

☐ Text (Encrypted)
 

Allows users to enter any combination of letters and numbers and store them in encrypted form.

☐ URL
 

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next
Cancel

Now select Next.

Fill all the details as given below.

The screenshot shows a form configuration interface for a field named "Father name". The form includes the following sections:

- Field Label:** A text input field containing "Father name" with a small "x" icon to its right.
- Length:** A text input field containing "16". Above this field is the instruction: "Please enter the maximum length for a text field below."
- Field Name:** A text input field containing "Father\_name" with a small "x" icon to its right.
- Description:** A large empty text area.
- Help Text:** A large empty text area with a small "x" icon to its right.
- Required:** A checkbox labeled "Always require a value in this field in order to save a record".
- Unique:** A checkbox labeled "Do not allow duplicate values". Below this are two radio buttons:
  - ☒ Treat "ABC" and "abc" as duplicate values (case insensitive)
  - ☐ Treat "ABC" and "abc" as different values (case sensitive)
- External ID:** A checkbox labeled "Set this field as the unique record identifier from an external system".
- Default Value:** A section with a link "Show Formula Editor" and a text input field. Below the field is a small text block: "Use formula syntax: e.g., Text in double quotes: 'Hello', Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7".

At the bottom right of the form, there are three buttons: "Previous", "Next" (which is highlighted with a red border), and "Cancel".

Then we are taken to new screen. Select visible to all.



Then we are taken to new screen. Select visible to all.

**Step 3. Establish field-level security** Step 3 of 4

Previous Next Cancel

Field Label	Father name
Data Type	Text
Field Name	Father_name
Description	

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Now Select Save & New. Like Father name field create all the remaining fields.

**Step 4 of 4**

Previous **Save & New** Save Cancel

Create all the custom fields. Below screen will be displayed

Create all the custom fields. Below screen will be displayed

Custom Fields & Relationships <span>New</span> <span>Field Dependencies</span> <span>Set History Tracking</span> <span>Custom Fields &amp; Relationships Help ?</span>						
Action	Field Label	API Name	Data Type	Controlling Field	Modified By	Track History
Edit   Del	Address	Address__c	Text Area(255)		crm.salesforce.Training 1/28/2014 5:18 AM	<input type="checkbox"/>
Edit   Del	DOB	DOB__c	Date		crm.salesforce.Training 1/28/2014 5:18 AM	<input type="checkbox"/>
Edit   Del	Father name	Father_name__c	Text(18)		crm.salesforce.Training 1/28/2014 5:15 AM	<input type="checkbox"/>
Edit   Del	Fee paid	Fee_paid__c	Currency(15, 2)		crm.salesforce.Training 1/28/2014 5:21 AM	<input type="checkbox"/>
Edit   Del	Phone number	Phone_number__c	Phone		crm.salesforce.Training 1/28/2014 5:19 AM	<input type="checkbox"/>
Edit   Del	S1	S1__c	Number(18, 0)		crm.salesforce.Training 1/28/2014 5:21 AM	<input type="checkbox"/>
Edit   Del	S2	S2__c	Number(18, 0)		crm.salesforce.Training 1/28/2014 5:22 AM	<input type="checkbox"/>
Edit   Del	S3	S3__c	Number(18, 0)		crm.salesforce.Training 1/28/2014 5:23 AM	<input type="checkbox"/>

Create all the custom fields as created above.

## Custom Objects

**How to create Custom Tabs in sfdc:** In this training article we are going to **create Custom Tabs** and also we are learning about how to **arrange custom Tabs in Tab Menu**.

Generally there are three types of Tabs available in sfdc.

1. Custom Object Tabs.
2. Custom Web Tabs.
3. Visualforce Tabs.

**Custom Tab Definition** : Custom Tab is a user interface component which we create to display custom Object data or other web content embedded in the application.

We can find all these three Tabs in different Editions of Salesforce.

**Custom Object Tabs** : Contact Manager, Group, Professional, Enterprise, Performance, unlimited and Developer Editions.

**Custom Web Tabs** : Contact Manager, Group, Professional, Enterprise, Performance, unlimited and Developer Editions.

**Visualforce Tabs** : Contact Manager, Group, Professional, Enterprise, Performance, unlimited and Developer Editions.

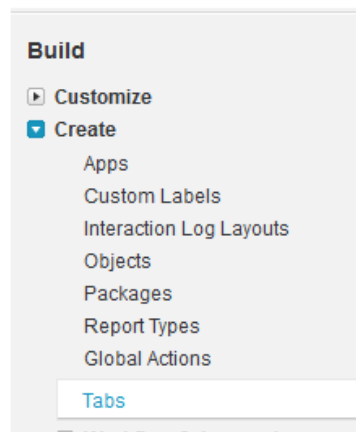
## How to create Custom Object Tabs in Sfdc.

**Custom Object Tabs** : Custom Object Tabs are those which displays the data of or custom object in a user interface tab. Custom Object look and function like Standard Objects.

### Steps to create Custom Tabs.

In Previous training articles we created Custom student Object. For Custom Student Object we are going to create Custom Student Tab and also we are going to arrange that custom Student Tab in Tab Menu.

First go to Setup Menu = > Build Section => Create => Tabs.



**Select New.**

Now we are required to select the object to which we want to create Tab and also select Tab Style from popup window.

**Select Next.**

Now we are taken to new window . Choose the user profiles for which the new Custom tab will be available and also we can examine or alter the visibility of tabs from the detail and edit pages of each profile.

**Select next.**

Step3 : Add to Custom Apps.

Choose the custom apps for which the new custom Object tab will be available. Select Include Tab check box and Save .

custom Object Tab is successfully created but we are not able to look in Tab Menu. In order to arrange Custom Student Tab in Tab menu select(+) all Tabs menu.

**Select Customize my Tabs.**

Now we see list of Available Tabs and selected tabs. Move Student Tab upwards using arrows. Place Student Object Tab to which place you prefer and Save.

**Customize My Tabs**

Choose the tabs that will display in each of your apps.

Custom App:  

Sales

Available Tabs

Data.com

Documents

Files

Groups

Ideas

Libraries

People

Price Books

Profile

Profile Feed

Profile Overview

Site.com

Add

Remove

Selected Tabs

Contacts

Opportunities

Forecasts

Courses

Contracts

Cases

Solutions

Products

Reports

Dashboards

employs

Students

Up

Down

Save

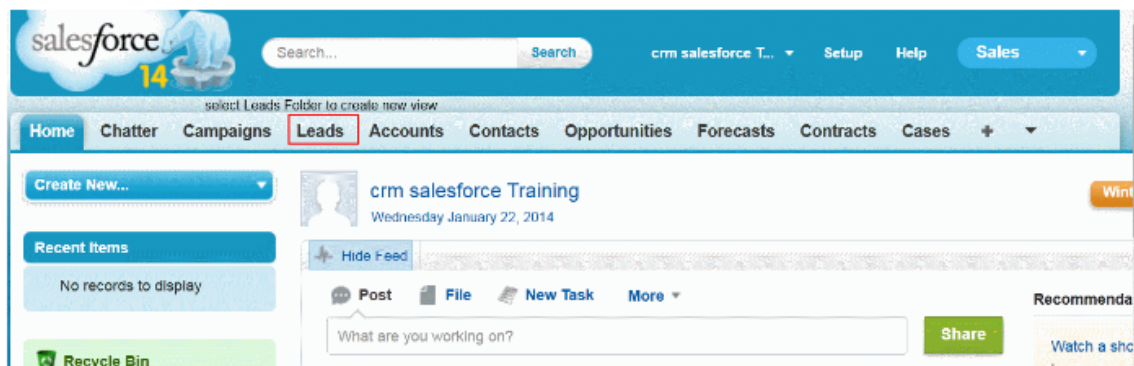
Cancel

# Components View

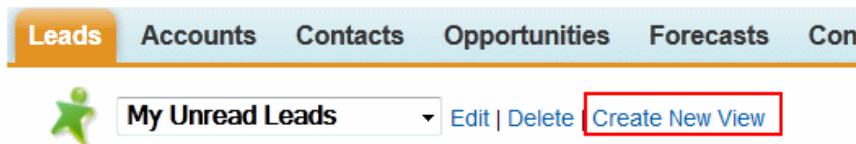
## How to create views in salesforce.com

Here in this article we are going to create a new view in salesforce.com. Creating views is the process to filter data that the data exact we want to view from a record. Views allows to filter the records as well as the relevant column data to be displayed and provides the flexibility in the given accessibility to specify set of users o to all the users or we can specify to visible only to you.

1. Click Lead Tab.



2. Now view Click hyperlink called create new view.



1. Now a form is shown.

### Step1.

Enter view name , view name unique .

**Step 1. Enter View Name**

= Required Information

View Name: USA leads

View Unique Name: USA leds

**Step 2. Specify Filter Criteria**

**Filter By Owner:**

☒ All Unconverted Leads

☐ My Unconverted Leads

☐ Queue --None--

**Filter By Campaign (Optional):**

Campaign Name:

[Field Filters Help ?](#)

**Filter By Additional Fields (Optional):**

Field	Operator	Value	
Country	equals	USA	AND
--None--	--None--		AND
--None--	--None--		AND

### **Step 2.**

Now specify filter criteria that you want to view . Select Filter by additional fields.

### **Step3.**

Now select display options that you want to view .

#### **Step 3. Select Fields to Display**

Available Fields		Selected Fields	
Salutation	<div>Add ▶</div> <div>Remove ◀</div>	Name	<div>Top ⬆</div> <div>Up ⬆</div> <div>Down ⬇</div> <div>Bottom ⬇</div>
Last Name		Company	
First Name		State/Province	
Title		Email	
Website		Lead Status	
Phone		Created Date	
Mobile		Owner Alias	
Fax		Unread By Owner	
Street			
City			
Zip/Postal Code			
Country			
Lead Source			
Industry			
Rating			



**Step 4.** Restrict Visibility.

**Step 4. Restrict Visibility**

- ☒ Visible only to **me**
- ☐ Visible to **all users** (Includes partner and customer portal users)
- ☐ Visible to certain **groups of users**

Save

Cancel

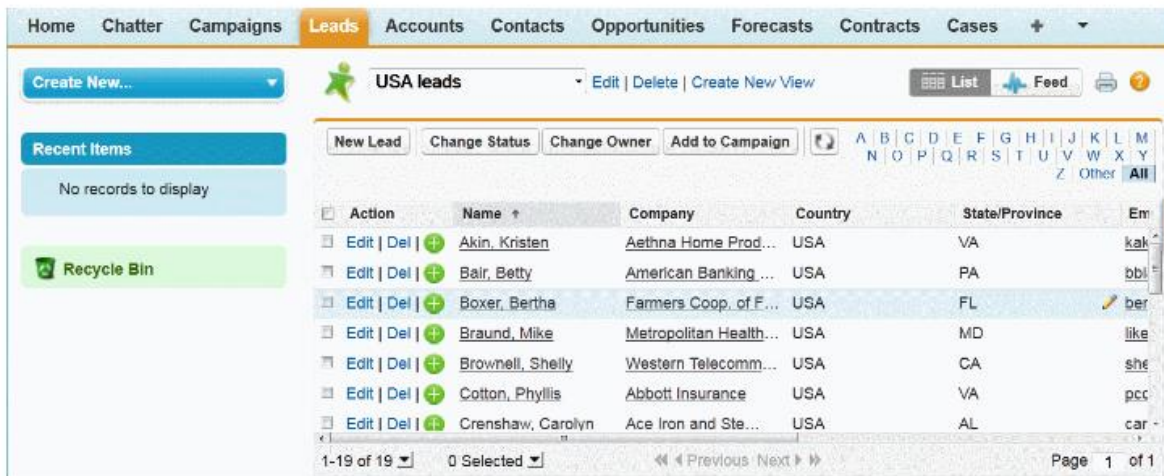
**Here we can find 3 options that to choose visibility.**

1. Visible to me.
2. Visible to all.
3. Visible to certain users.

Select any one from the above options.

Select **SAVE.**

In the above criteria elements add filter elements specify multiple conditions.



The screenshot shows a CRM interface with a navigation bar at the top containing links for Home, Chatter, Campaigns, Leads, Accounts, Contacts, Opportunities, Forecasts, Contracts, and Cases. The 'Leads' tab is selected. On the left sidebar, there is a 'Create New...' button, a 'Recent Items' section with 'No records to display', and a 'Recycle Bin' button. The main content area displays a list of leads under the heading 'USA leads'. Above the list are buttons for 'New Lead', 'Change Status', 'Change Owner', and 'Add to Campaign'. A search bar with a dropdown arrow is also present. The list itself has columns for Action, Name, Company, Country, State/Province, and Email. The first six rows of the list are visible, showing leads from Akin, Kristen to Crenshaw, Carolyn. At the bottom, there is a pagination bar showing '1-19 of 19' and '0 Selected'.

Action	Name	Company	Country	State/Province	Email
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	Akin, Kristen	Aethna Home Prod...	USA	VA	kak...
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	Bair, Betty	American Banking ...	USA	PA	bb...
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	Boxer, Bertha	Farmers Coop. of F...	USA	FL	ber...
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	Braund, Mike	Metropolitan Health...	USA	MD	like...
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	Brownell, Shelly	Western Telecomm...	USA	CA	she...
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	Cotton, Phyllis	Abbott Insurance	USA	VA	pcc...
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	Crenshaw, Carolyn	Ace Iron and Ste...	USA	AL	car...

Here we can find all the Leads who belongs to Country USA.

Ex : If i want to put the filter condition to Country belongs to USA, State/ Province belongs to PA my filter condition will be like below.

(Country equals USA) **AND** (State/Province equals to PA).