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. Below we have given screenshot here we find all menu available. After logging in to your free developer account(salesforce 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 afield 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.

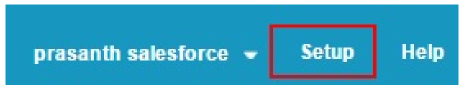
Custom Objects : Salesforce Custom objects are those which are created by user. We can create any number of custom objects. Example :- Student info, college etc.

Creating Custom object in salesforce.

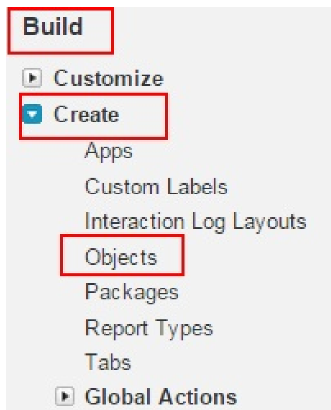
1. Go to **Setup Menu.**
2. **Configuration** (Available on Side Bar).
3. Now go to **Build** section.
4. Go to **create**.
5. Select **Objects**.

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

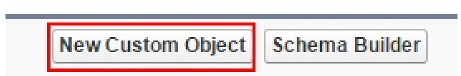
- Go to **Setup menu**



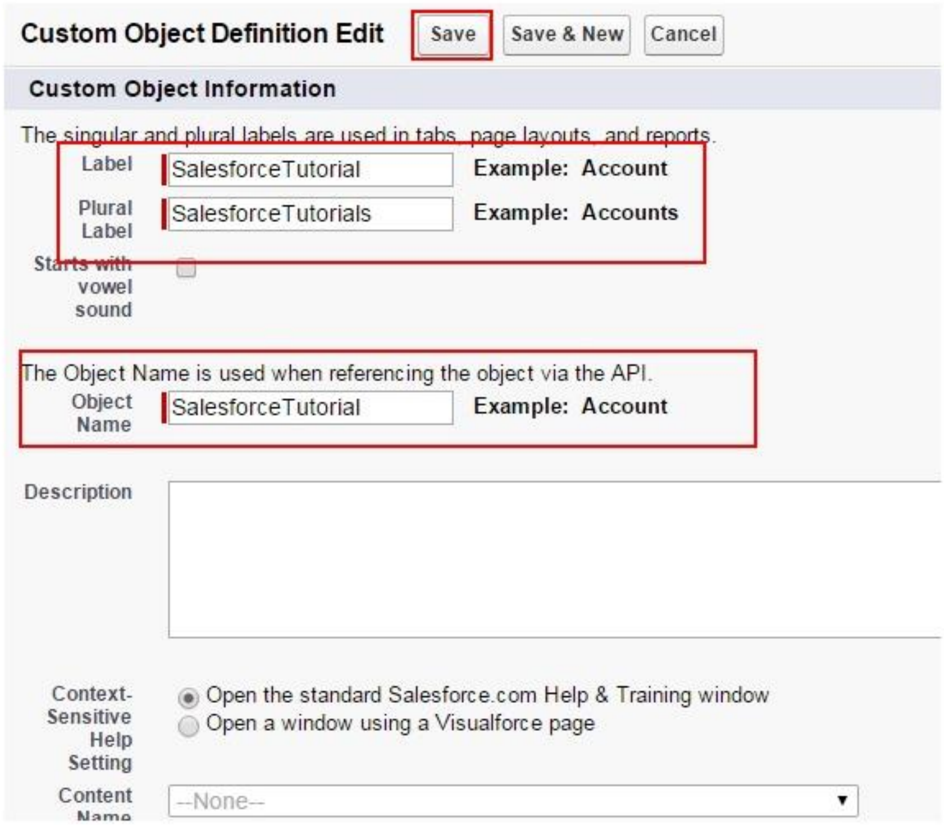
- Now go to **configuration** which is available on side bar. Then go to **Build = > Create = > Objects.**



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--

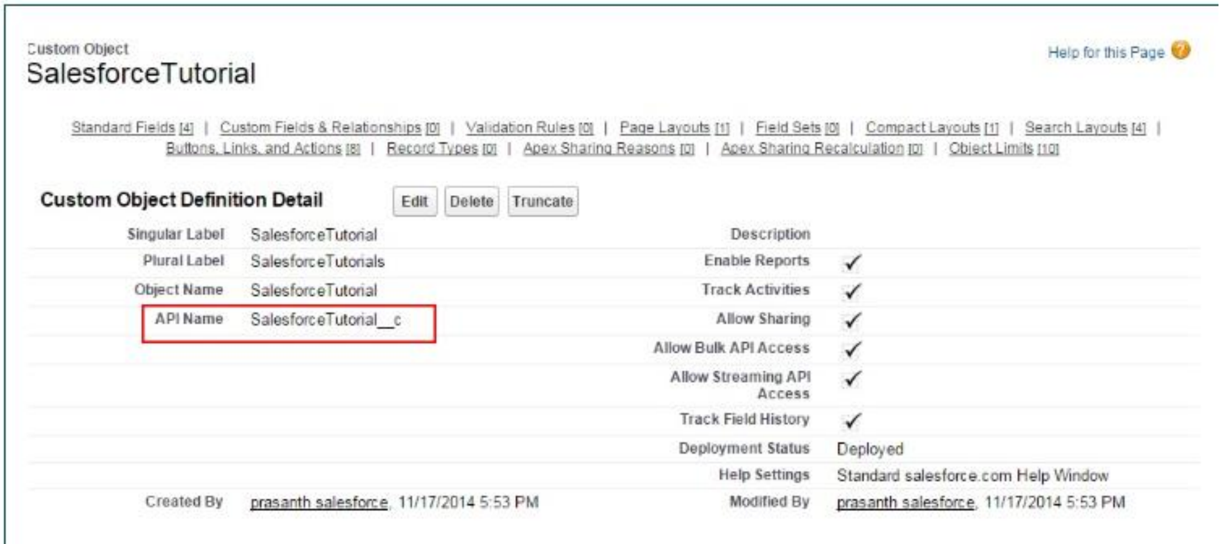
Record name will be automatically generated as given for label name. And next option is to select **data type**. In object creation we are having to Data types**. 1) Text 2) Auto number**. In our next article we can find clear details on **data types**.

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.**



Salesforce Objects

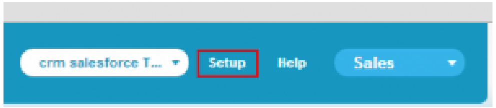
And also we observe Standard fields like Created By, Last modified by, owner, Name. These are the 4 Standard fields in a Custom Object.

Custom Fields

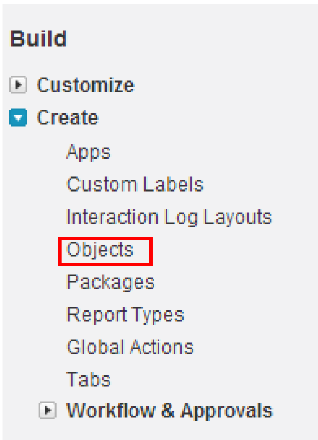
How to create custom fields in Salesforce : In this tutorial we are going to study about how to create custom fields in an Custom object. To create custom fields we have to create Custom objects already. In our previous article we studied how to create Custom object in salesforce. And now we are creating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

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

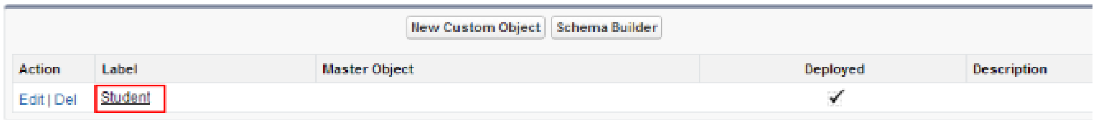
To create fields in an Custom object go to Setup Menu



Build = > Create = > Objects



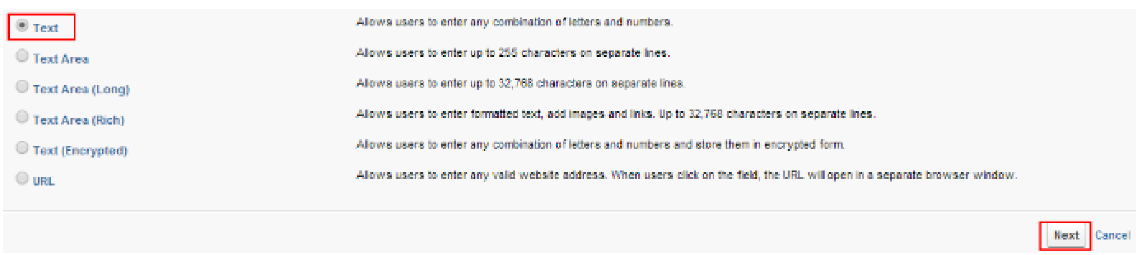
No select the objects in which you the custom fields you want to create.



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

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.



Now select Next.

Fill all the details as given below.

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

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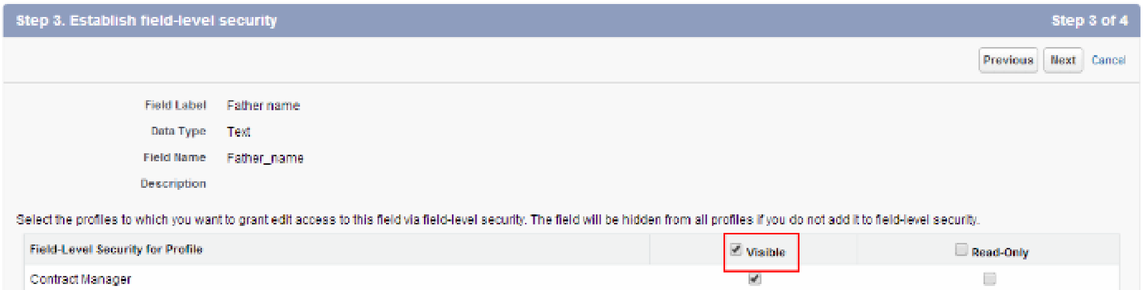
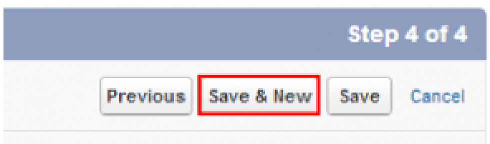


Now Select Save & New. Like Father name field create all the remaining fields.



Create all the custom fields. Below screen will be displayed

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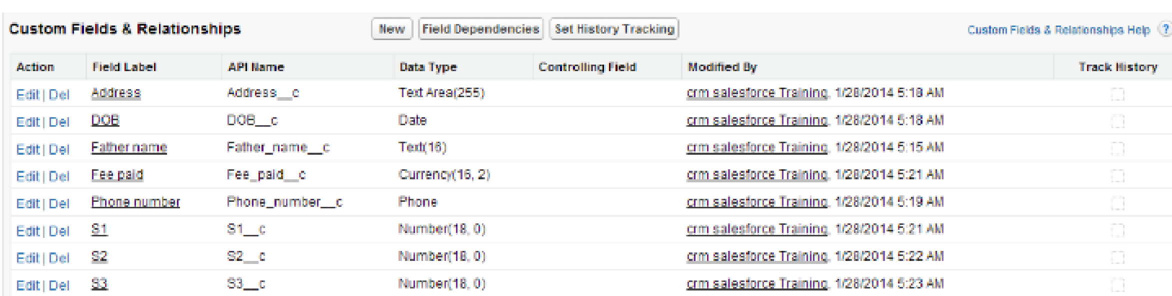

Custom Fields & Relationships [New] [Field Dependencies] [Set History Tracking] Custom Fields & Relationships Help

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	
Edit | Del	DOB	DOB__c	Date		crm salesforce Training, 1/28/2014 5:18 AM	
Edit | Del	Father name	Father_name__c	Text(16)		crm salesforce Training, 1/28/2014 5:15 AM	
Edit | Del	Fee paid	Fee_paid__c	Currency(16, 2)		crm salesforce Training, 1/28/2014 5:21 AM	
Edit | Del	Phone number	Phone_number__c	Phone		crm salesforce Training, 1/28/2014 5:19 AM	
Edit | Del	S1	S1__c	Number(18, 0)		crm salesforce Training, 1/28/2014 5:21 AM	
Edit | Del	S2	S2__c	Number(18, 0)		crm salesforce Training, 1/28/2014 5:22 AM	
Edit | Del	S3	S3__c	Number(18, 0)		crm salesforce Training, 1/28/2014 5:23 AM	

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.

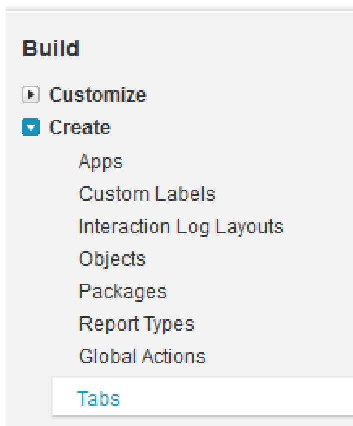
How to create Custom Object Tabs in Sfdc.

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.

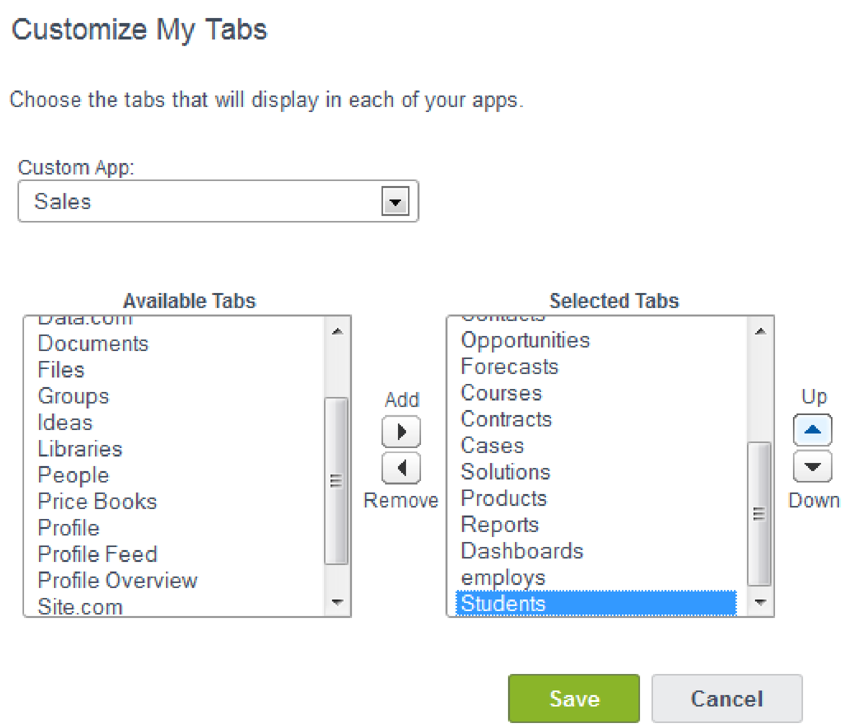
Step3 : Add to Custom Apps.

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.

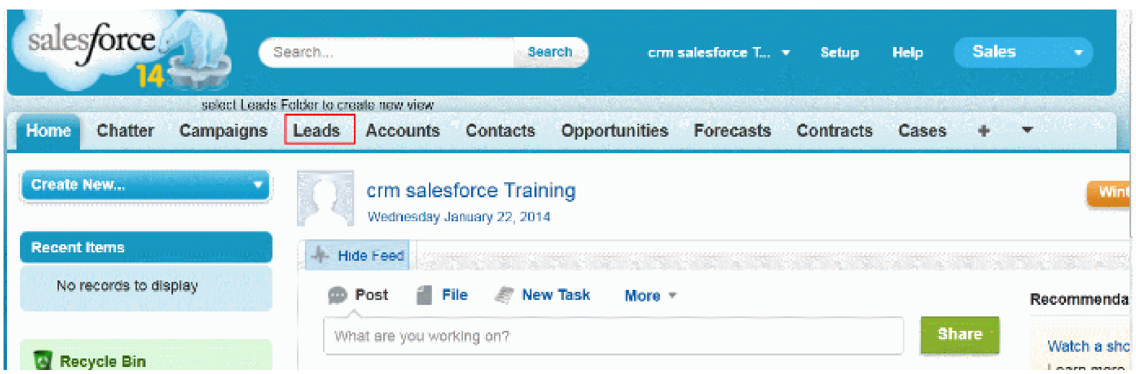


Components View

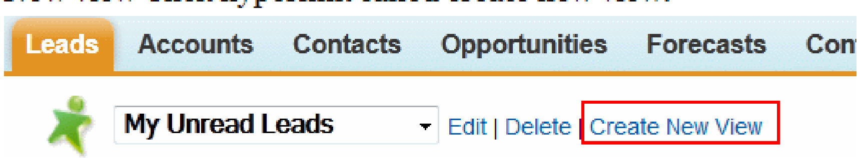
How to create views in salesforce.com

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.



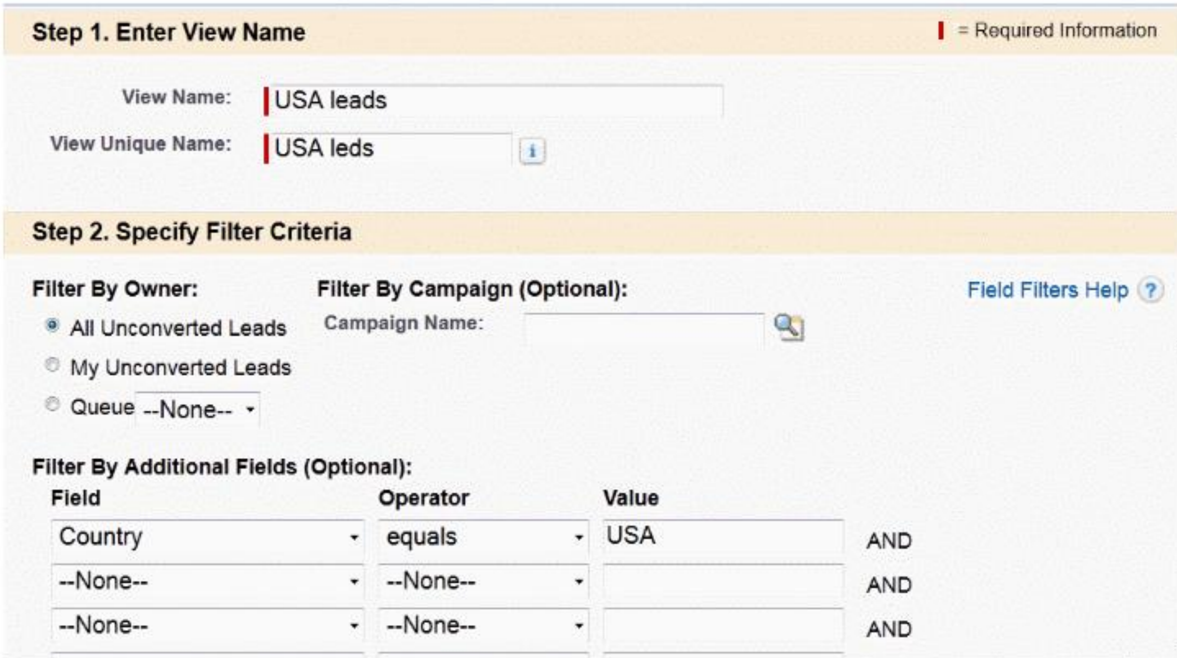
2. Now view Click hyperlink called create new view.



1. Now a form is shown.

Step1.

Enter view name , view name unique .

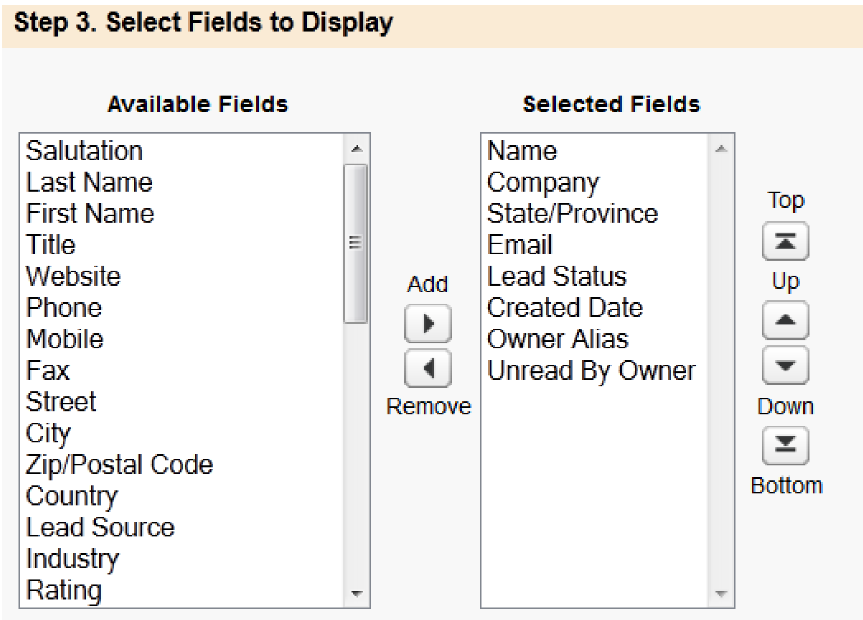


Step 2.

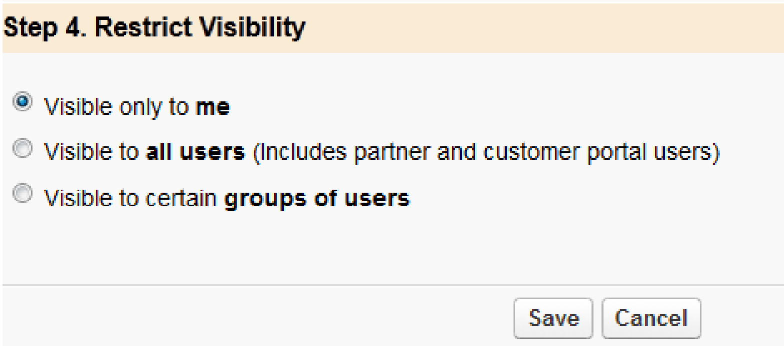
Now specify filter criteria that you want to view . Select Filter by additional fields.

Step3.

Now select display options that you want to view .



Step 4. Restrict Visibility.



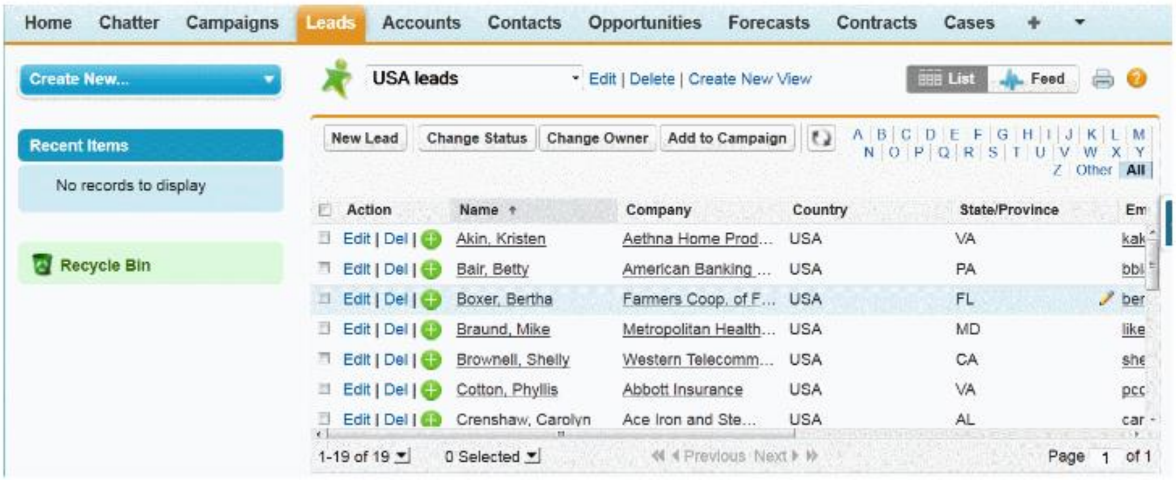
Here we can find 3 options that to choose visibility.

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.



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).