Salesforce BootCamp

Agenda

Why Cloud Computing and Salesforce
 Salesforce Benefits to Customer
Salesforce Offerings
Releases
 Concept of clicks vs coding for faster development
 Salesforce Editions and license
Get started with a developer org
Move on to actual configuration of applications/objects and UI

Issues with Client Server Systems

Mainframes, Client /Server Computing/ Web based

→The customers have to purchase servers, network and storage infrastructure and maintain all of them in a large space of their own called a Datacenter!

→This also needs cooling equipment, power supply, leased line to the head office and branch offices!

→Apart from all of this you need to buy software to be installed on the servers, desktops of your users and constantly upgraded and maintained

→Buy Operating system, DB server, desktop OS, application server software, firewall and other security software

→Cloud is a metaphor for Internet and is all about accessing services available over the Internet without worrying about buying or maintaining hardware, software and setting your own data centre as a business

→Salesforce is one of the pioneers of Cloud Computing back in 1998

→Salesforce CRM and Force.com platform available on the Cloud

Technology change

Two main types of CRM systems

On Premise / Traditional systems (Siebel)

On Demand / Cloud Based Systems (SFDC)

1960's
Mainframe

1980's
Client/server

Today
Cloud Computing Applications

Key Benefits for Customers

→Don't worry about buying, deploying, configuring hardware and software

→No need to upgrade hardware , software every year , it's done automatically !

→Just focus on solving your business problem by building apps

→SFDC has 3 product releases every year (Winter, Spring, Summer)

→Pay-as-you-go model / subscription based model

→Mobile enabled (to access SF1 from your smartphone please try as given below

→Install the SF1 app on your android or IOS device

→Simulator on browser (https://ap2.salesforce.com/one/one.app)

OnPremise Vs Cloud Cost

On Premises - Hidden Costs

Cloud Computing

46% Lower TCO

No Upfront License Fees

No Hardware Infrastructure

Lower Implementation Costs

Free Upgrades

No Ongoing Maintenance Fees

Predictable

"A software-as-a-service model will **substantially lower TCO**, especially in the first year."

Key Offerings Salesforce Cloud

Multi-tenant

Automatic Upgrades

Secure

Integrated

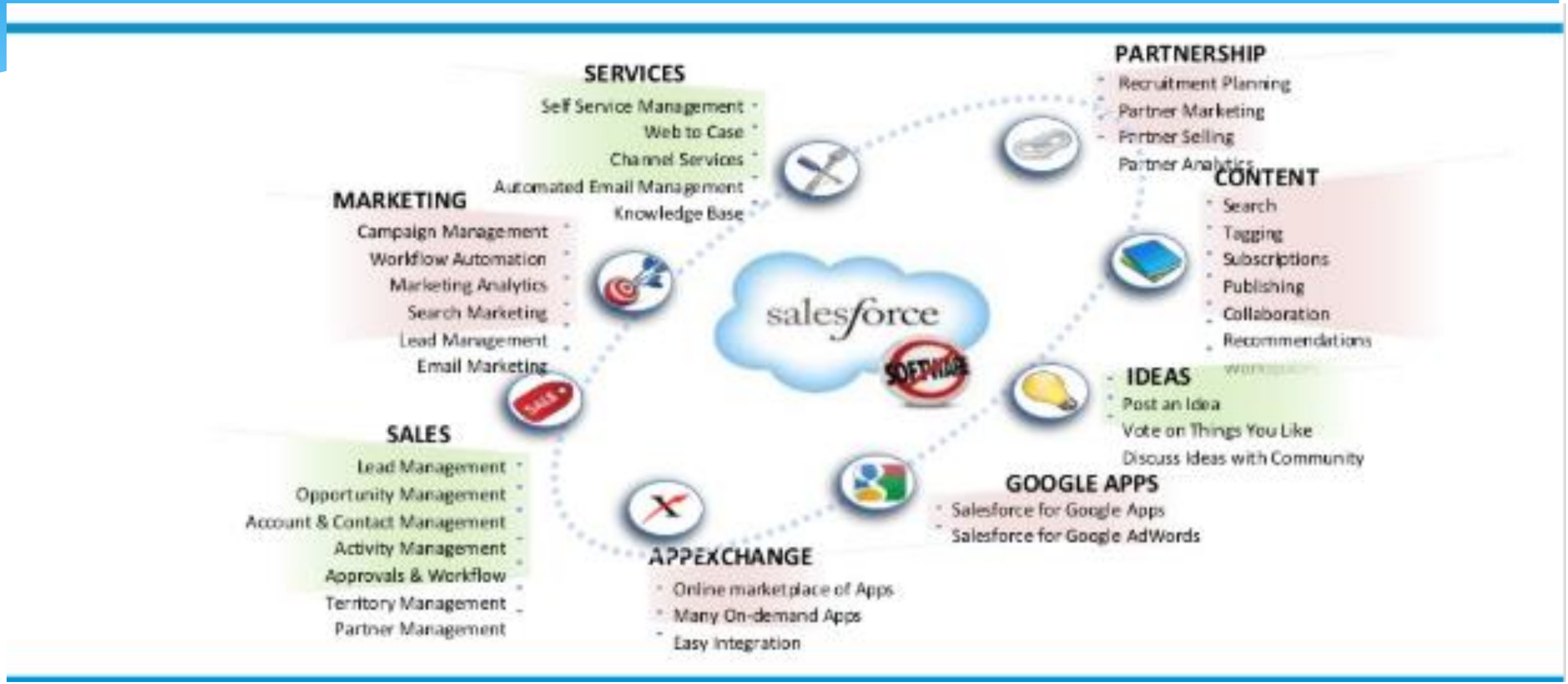
Easy to Use

5 Times Faster

Half the Cost

"Companies were able to reduce their three year TCO by 54%, saving $560,000 per application."

Standard salesforce applications



Salesforce.com Releases

Release	Release objective	Frequency	TYPICAL Time of the week	Example
Major	Significant new functionality and enhancement	Approx 3 - 4 per year	Friday night, Saturday	Planned 146 release
Patch/Dot	Bug fixes or minor functionality enhancement	Weekly for first 3-4 weeks after major release Every other week there after	Wednesday evening (No Downtime)	End user experience enhancement with 146.8 release
E Release	Fix production vulnerabilities	Unscheduled on as needed basis	(No Downtime)	Break fix errors

Key for developers: Click vs Code

→Declarative (Point and Click)

- » Data modelling
- » Business logic
- » Process Automation (Lightning Process builder)
- » User Interface
- » Reports and Dashboards
- » Mobile access (SF1)

→Programmatic

- » Apex and Visualforce
- » SOQL and SOSL

Multi-tenant And Key Points To Keep In Mind

→If you are living in an apartment you have to respect the rules of the apartment !!

→These are not constraints or limitations as SF1 provides computing power that's at par with any this is basic discipline in even on premise environment

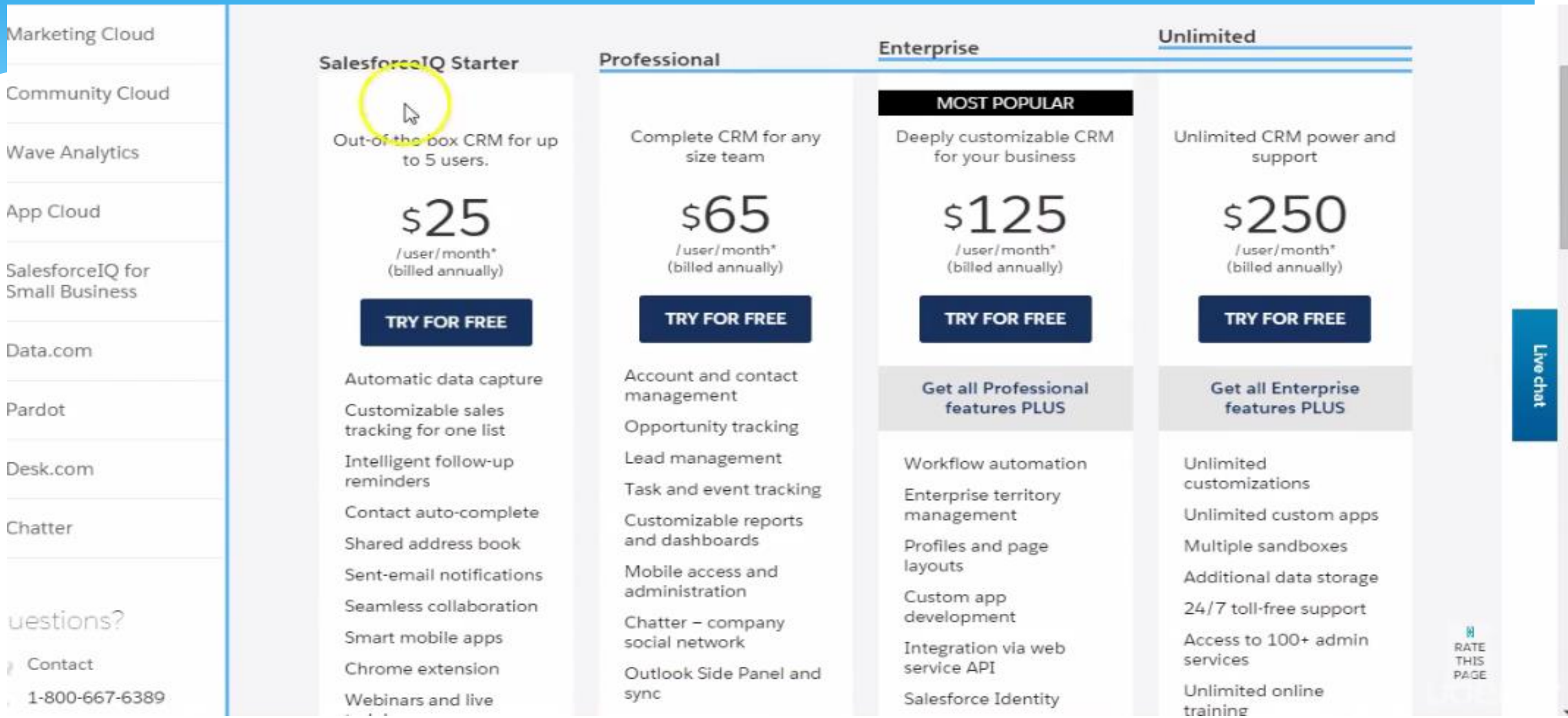
→Governor limits !!

→ Need not worry too much at the declarative / click mode of development level but there are number of custom objects, number of records, number of workflow rules and number of fields p can be created

→Advanced developers using Apex and VF and other integration stuff should be aware of these!

→This is about optimal use of computing resources like CPU, heap memory, storage , network etc.

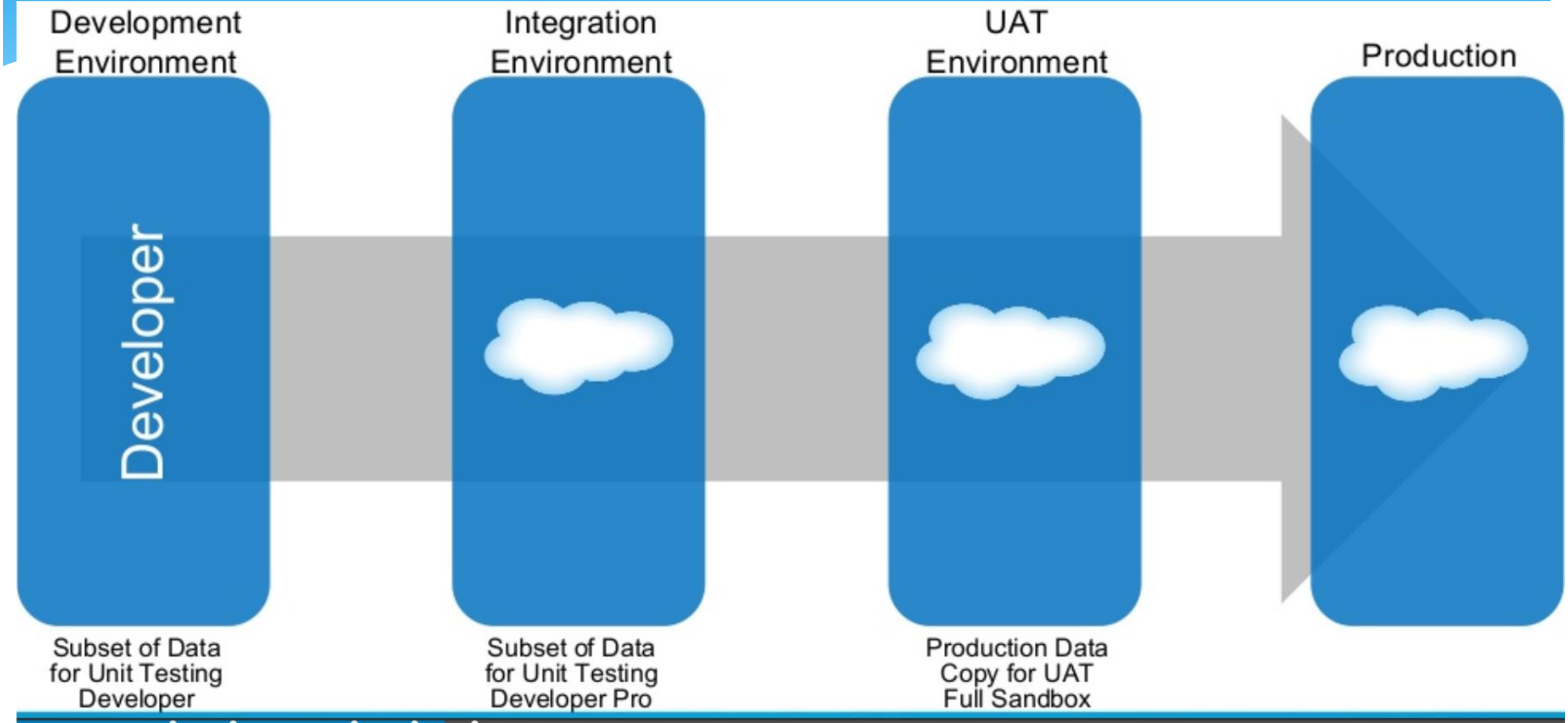
Salesforce Licenses



Sandboxes and Developer Edition – A comparison

Development Environment	User Licenses	Data Storage	Notes
Developer Edition	2 CRM Licenses	5 MB	Sign up is free
Full Sandbox	Same as PROD	Same as PROD	Paid. This is a copy of your production org including data and customization
Partial Copy Sandbox	Same as PROD	5 GB data (about 2.5M records)	Paid. This copies the customization, and a sample of your production organization's data.
Developer Pro Sandbox	Same as PROD	1 GB data (about 0.5M records)	Paid. This copies customization (metadata), it doesn't copy production data
Developer Sandbox	Same as PROD	200 MB data (about 100K records)	Paid. This copies customization (metadata), it doesn't copy production data

Sandboxes in salesforce



Create your developer org and Login

→https://developer.salesforce.com/signup - Lifetime free environment

→Saleforce1 mobile app on iOS /Android Mobile platform

→http://login.salesforce.com

→Please provide a working email id to get the login details

→The Force.com environment has a built-in database, user-friendly GUI ,a business logic layer and a solid multi-layered security model to allow multiple users and devices and API calls all bundled into this platform .

→This is a data driven / data centric application with objects, fields like a typical RDBMS product like MS Access, ORACLE etc.

→Apart from data even data about data (Metadata) is stored in the same database. Auto-upgraded three times in an year (Summer, Winter, Spring)

→Multi-tenant and meta-data driven architecture

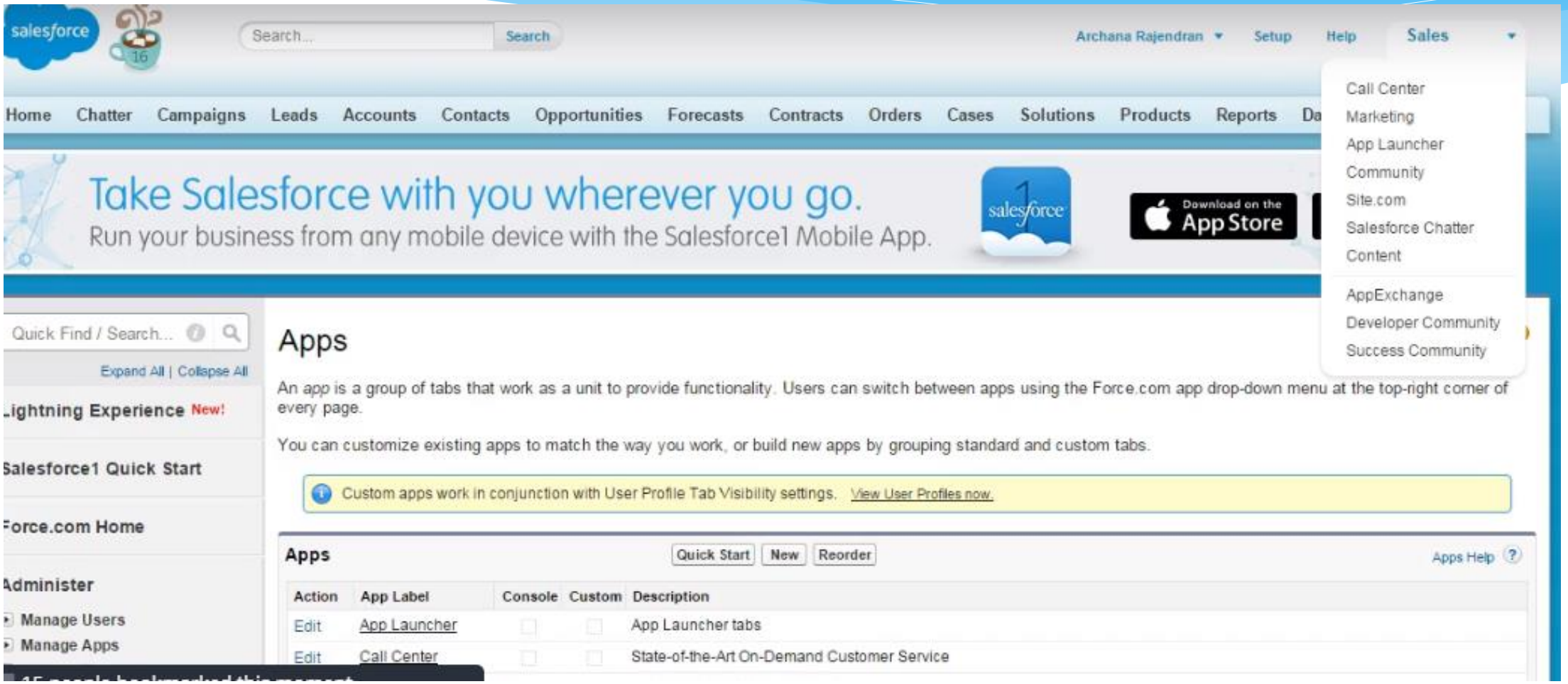
Main Parts of an salesforce application

* App : is Group of related tabs towards a business function,example sales app,service app. Apps are a collection of Tabs.
* Tabs:Point to an underlying table or Sobject in salesforce. They can be standard tabs or custom tabs. Example Account Tab,Lead Tab
* Sobject:Table which stores the information of any entity
* Fields and Records are part of sobject. Fields can be of differenct data types
* Page Layouts :Every custom object will have a page layout automatically created,user can make changes to the layout
* Record pages: For lightning ,record pages are used to show data ,contains many components . But object page layout is still used to render record detail data
* Labs:Browse through standard app,build a custom app with few standard tabs .

Objects

* **Objects**
*
* Objects are a key element in Salesforce CRM as they provide a structure for storing data and are incorporated in the interface, allowing users to interact with the data.
*
* Similar in nature to a database table, objects have properties such as:
*
* Fields which are similar in concept to a database column
*
* Records which are similar in concept to a database row
*
* Relationships to other objects
*
* Optional tabs which are user interface components to display the object data

Apps


salesforce
Search...
Search
Archana Rajendran
Setup
Help
Sales
Call Center
Marketing
App Launcher
Community
Site.com
Salesforce Chatter
Content
AppExchange
Developer Community
Success Community
Home
Chatter
Campaigns
Leads
Accounts
Contacts
Opportunities
Forecasts
Contracts
Orders
Cases
Solutions
Products
Reports
Take Salesforce with you wherever you go.
Run your business from any mobile device with the Salesforce1 Mobile App.
Download on the App Store
Quick Find / Search...
Expand All | Collapse All
Lightning Experience New!
Salesforce1 Quick Start
Force.com Home
Administer
Manage Users
Manage Apps
Apps
An app is a group of tabs that work as a unit to provide functionality. Users can switch between apps using the Force.com app drop-down menu at the top-right corner of every page.
You can customize existing apps to match the way you work, or build new apps by grouping standard and custom tabs.
Custom apps work in conjunction with User Profile Tab Visibility settings. View User Profiles now.
Apps
Quick Start
New
Reorder
Apps Help
Action
App Label
Console
Custom
Description
Edit
App Launcher
App Launcher tabs
Edit
Call Center
State-of-the-Art On-Demand Customer Service

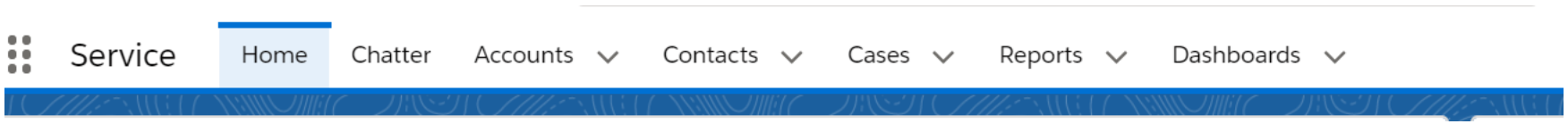
Type of Objects

* **Standard objects**
*
* Salesforce provides standard objects in the application when you sign up and these include Account, Contact, Opportunity, and so on. These are the tables that contain the data records in any standard tab such as Accounts, Contacts, or Opportunities.
*
* In addition to the standard objects, you can create custom objects and custom tabs.
*
* **Custom objects**
*
* Custom objects are the tables you create to store your data. You can create a custom object to store data specific to your organization. Once you have the custom objects and have created records for these objects, you can also create

Tabs

* **Tabs**
* A tab is a user-interface element which, when clicked, displays the record data on a page specific to that **object.**
* **Standard tabs**
*
* Salesforce provides tabs for each of the standard objects that are provided in the application when you sign up. For example, there are standard tabs for **Accounts**, **Contacts**, **Opportunities**, and so on:
*
* Visibility of the tab depends on the setting on the tab display setting for the app.
*
*
* **Custom tabs**
*
* You can create three different types of custom tabs: **Custom Object Tabs**, **Web Tabs**, and **Visualforce Tabs**.
*

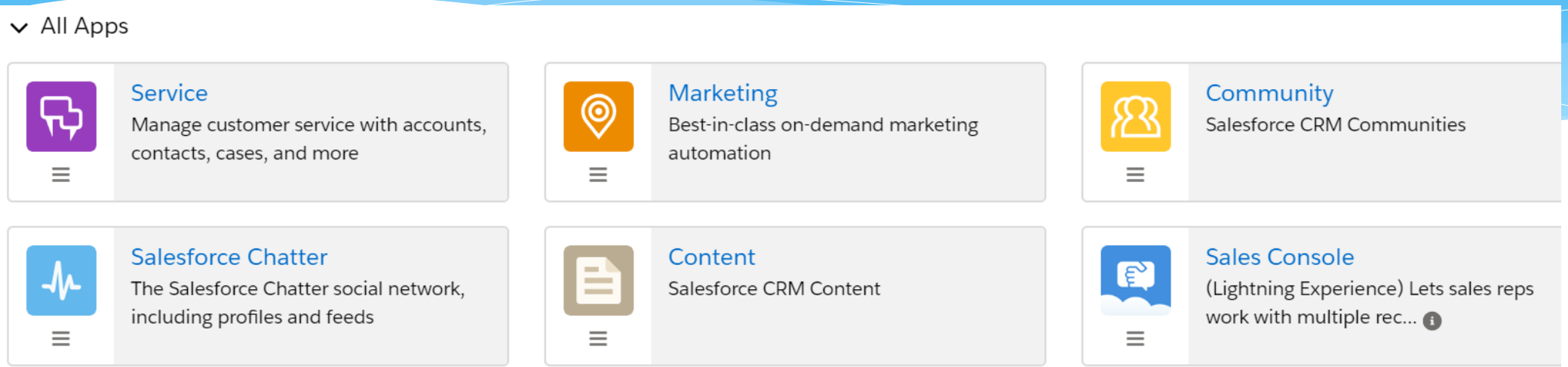
Tabs


Service
Home
Chatter
Accounts
Contacts
Cases
Reports
Dashboards

APPS

* **Apps**
* An app in Salesforce is a container for all the objects, tabs, processes, and services associated with a business function.
* **Standard apps**
*
* Salesforce provides standard apps such as **Sales**, **Call Center**, and **Marketing**.
*
* **Custom apps**
*
* A custom app can optionally include a custom logo.
*
* Both standard and custom apps consist of a name, a description, and an ordered list of tabs.

Apps in lightning



Basic Setup-Lab

* Check your user profile and role in setup
* Browse through the apps and tabs
* Ensure you have access to classic and lightning interface
* Setup company information .
* Business hours ,holiday for response- will look at more detail in service cloud module

Default Org settings

* **Default locale :**The default locale setting affects the format of date, date/time, and number fields.
* For example, a given date in the English (United States) locale would appear as 07/27/2012 and in the English (United Kingdom) locale as 27/07/2012.
* However, individual users can set their own locale which will override the

* **Default time zone**
* This is the primary time zone in which your organization is located. The head-office location, for example.. However, individual users can set their own time zone which will override the organization-wide setting.
* The **Company Information** page also displays all of the base licenses, active users, and feature licenses that have been purchased by your organization.

Default Org settings

* **Standard fiscal years**
*
* The fiscal year settings in Salesforce by default use the Gregorian calendar year (twelve month structure) starting from January 1st and ending on December 31st. If your organization follows the twelve month structure you can use standard fiscal years. Standard fiscal years can start on the first day of any month and you can specify whether the fiscal year is named for the starting or ending year. For example, if your fiscal year starts in April 2012 and ends in March 2013, your fiscal year setting can be either 2012 or 2013.
*
* **Custom fiscal years**
*
* If your fiscal year is more complicated than this, you can define these periods using custom fiscal years. For example, as part of a custom fiscal year, you can create a 13-week quarter represented by three periods of 4, 4, and 5 weeks, instead of calendar months