

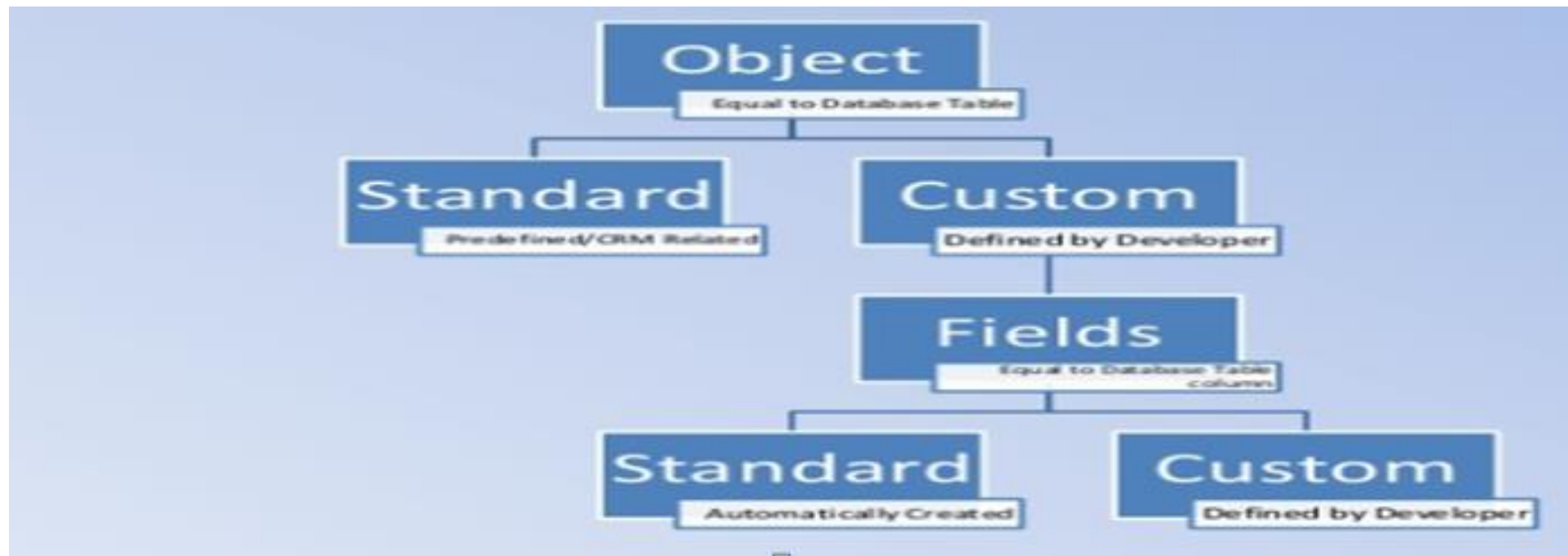
Object Configurations

- * What are objects
- * What are standard and custom objects and fields
- * How to create custom fields in std objects
- * How to create custom objects and custom fields
- * Field Data types and key properties(required,unique,foreign key)
- * Advanced data types (automatic validation,formatting)
- * UI:Page Configuring and creating page layout for objects
- * Set up history tracking for record updates on an object
- * Setting up chatter

Object is a Table

- Objects logically correspond to database tables in a relational database.
- Objects can be **Standard or Custom**. Standard are objects are predefined by Salesforce like Accounts, Case, Contact etc
- Custom objects store information that is unique and important to your organization. Custom objects are created by developers based upon application requirements.
- Custom objects are reportable and search-able.
 - **Creating Record**
The record type can be text or auto-number. Auto-number can take values like A-{0001}, A-{0002} etc

Objects And Fields



Field and Data Types

→ Custom Fields - Fields created to store different custom information

→ Standard Fields are created when the object is created

- » **ID** - Primary key, System generated, indexed. First 3 characters represents the object (All account records will start with 001, contact start with 003 etc.) <https://ap2.salesforce.com/003280000028JIJ> represent a contact record
- » **Name** - Required field, data type - text or auto-number, appears as first column in list views and related lists, indexed, is required
- » **Owner** - Record owner, creator of the record is the first owner and can be changed later
- » Created By, Created Date, Last modified data, Last modified by are other standard fields

→ Data types

- » Numeric, Picklist, multi-picklist, checkbox, text, formatted etc.
- » Auto-number, roll-up summary, Formula

Fields and Data types

- **Name** - is an internal reference - salary__c (__c is automatically added to the field when it is stored, this is referred in APIs)
- **More properties** - Required field, Unique field
- Default value, help text, **Encrypted fields**
 - » Can encrypted field be unique or an external field???
- **External ID** (This is important for data uploads !!) - Text, number, email id can be marked as External id
 - » Object can have 3 (can be more in future) external IDs max, only text, number or email can be marked as External Id
 - » Will have a custom index created automatically
- If custom field is deleted after records are created, this could result in data loss

Data Types for Fields

Custom Fields in Salesforce

Numeric	Calendar	Required Options	Formatted	Text	Calculation
Number	Date	Check Box	Email	Text	Auto number
Currency		Pick List	Phone	Text Area (Long)	Formula
Percent	Date time	Pick List(Multi select)	URL	Text Area (Rich)	Roll-up Summary
				Encrypted	

Field Creation Process:Automatic layout and profile settings sidenote

- * When you create a new field, 2 things will keep appearing everytime during the process
- * Layouts to be added,Salesforce will automatically add the new fields to any existing layouts.
- * Which Profiles can see the fields, Profiles control what apps,tabs,crud access an object can have,we will look at profiles in security settings module

Layouts

- * Layouts are UI screens automatically created for each and every object that either exist or is created
- * Layouts hold fields, sections, buttons,
- * Layouts hold related list UI which shows related records to main object
- * Layout look and feel can be configured.
- * Layouts can be cloned to create new, and assigned to different record type and profile. So when user selects the record type, user will be presented with that particular record type layout.
- * Layouts data is saved, edited, deleted by underlying standard controller.

Record type

- * Each object can have multiple record types
- * Each record type can be assigned to particular profile .
- * So user with the right profile can access the right record types.
- * Record type can be used to show particular layout or list of values
- * Profiles control what apps,layouts,object level access,we will look at profiles in detail in the security settings module.

Mapping record type to profile and layouts

- * We can multiple record types and create layout for each record type
- * Need to map record type to layout via user profiles
- * So if a profile has access to all the record types,the user will see the record type selection when user hits new button and will se corresponding layout
- * Lab:Actual implementation

Edit page layouts

- * Navigate to a record and click the edit layout in the quick access menu

HomeAccountsCasesStudentMaster2sStudentmarks2s+

Create New...

Shortcut

Calendar

Unresolved Items

Recent Items

Online Demo

Richard

3

2

Ashwin

1

Ashwin

Ashwin

New account creation triggered

Lastdemopiece1

Online Demo

Customize Page | Edit Layout

force.com

View Fields

View Object

View Validation Rules

View Approvals

Edit App

Edit Layout

View Record Type

Import Data

Turn off menu

Show Feed

Click to add topics:

Back to List: Custom Object Definitions

Contacts [1]

Account History [1]

Opportunities [0]

Cases [0]

Open Activities [1]

Activity History [0]

Notes & Attachments [0]

Partners [0]

Accountdetails [0]

Account Team [0]

Orders [0]

Student Masters [0]

Contacts [0]

Contacts (Dellaccountmd) [0]

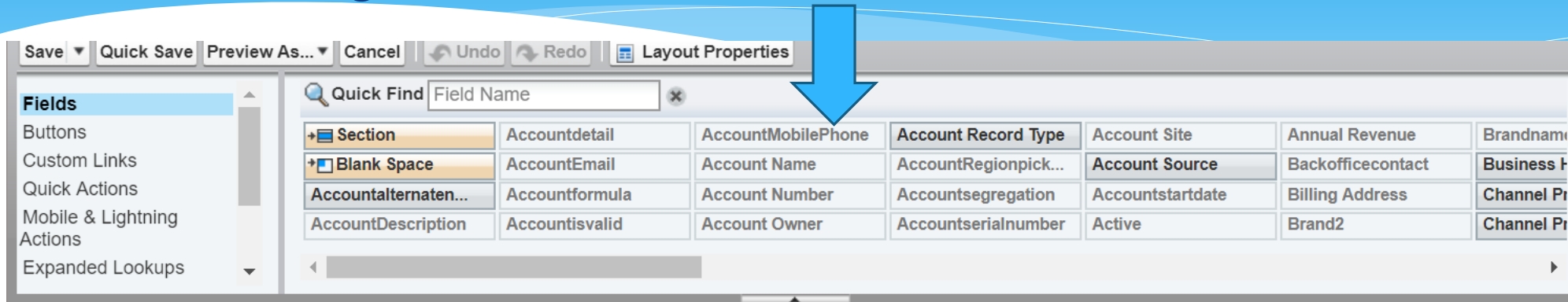
Account Detail

EditDeleteSharingInclude OfflineManage External Account

Account Owner	Naren R [Change]	Active	No
Account Name	Online Demo [View Hierarchy]	Type	
Parent Account		Rating	
Account Number	777	Phone	
Account Site		Fax	
Industry		Website	
SIC Code		Ticker Symbol	
Annual Revenue		Upsell Opportunity	
Employees		Ownership	
Masterhotelbill		Number of Locations	

Format fields/sections/spaces

- * Click and drag fields in to the layout from the field sets



Save Quick Save Preview As... Cancel Undo Redo Layout Properties

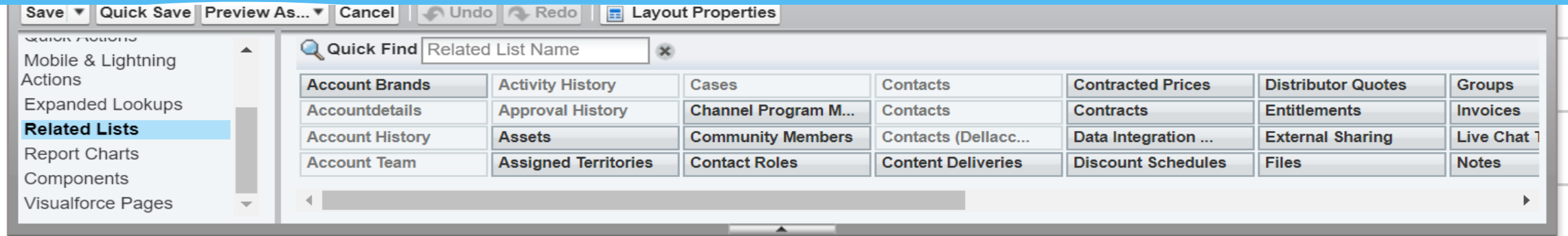
Quick Find Field Name

Section	Accountdetail	Account MobilePhone	Account Record Type	Account Site	Annual Revenue	Brandname
Blank Space	AccountEmail	Account Name	AccountRegionpick...	Account Source	Backofficecontact	Business I
Accountalternaten...	Accountformula	Account Number	Accountsegregation	Accountstartdate	Billing Address	Channel Pr
AccountDescription	Accountisvalid	Account Owner	Accountserialnumber	Active	Brand2	Channel Pr

Account Information (Header visible on edit only)

Account Owner	Sample Text	Exclude from territory assignment rules	<input checked="" type="checkbox"/>
* Account Name	Sample Text	* Active	Sample Text
Parent Account	Sample Text	Type	Sample Text
Account Number	Sample Text	Rating	Sample Text
Account Site	Sample Text	Phone	1-415-555-1212
Industry	Sample Text	Fax	1-415-555-1212
SIC Code	Sample Text	Website	www.salesforce.com
Annual Revenue	Rs.123.45	Ticker Symbol	Sample Text
Employees	56,805	Upsell Opportunity	Sample Text
Masterhotelbill	Sample Text	Ownership	Sample Text
registernum	78,099	Number of Locations	79
Accountdetail	Sample Text		

Configure the related lists if the object has MD or lookup relation



Mobile Cards (Salesforce mobile only)

Twitter

Related Lists

Contacts

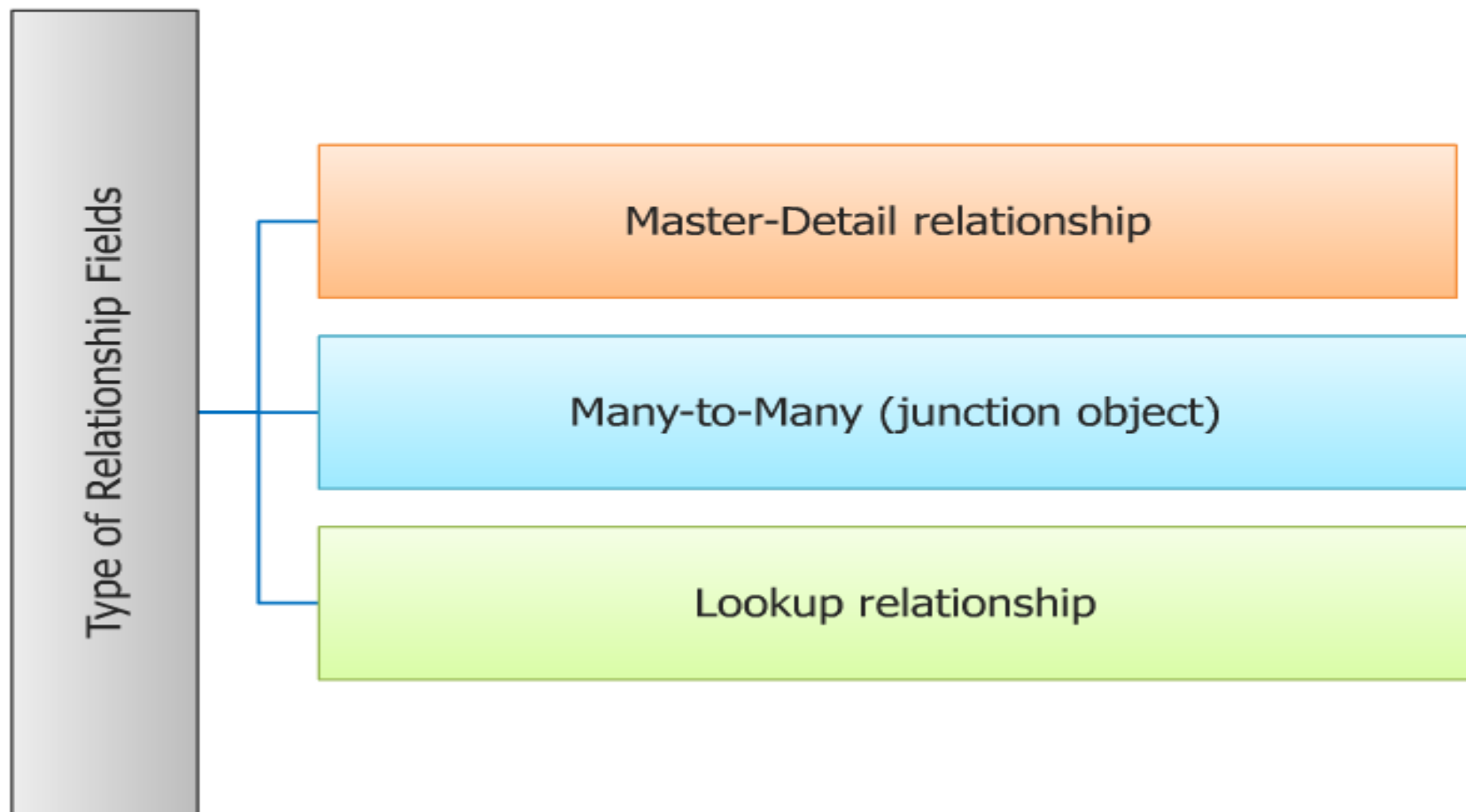
New Merge Contacts Add to Campaign

Contact Name	Title	Email
Sarah Sample	Sample Text	sarah.sample@company.com

Labs

- * Create Custom app objects/Tabs/fields
- * Adding custom fields to standard objects
- * Create New App and add the tabs
- * List views and Page layouts for labs
- * Create criteria based list view
- * Create section in page layouts for the objects

Type of Relationship Fields



Type of Relationship Fields

Master-Detail relationship

- Tightly coupled relationship between two objects
- Detail object inherit the look and feel and security of Master
- Records in detail object cannot be created first, Master record is required
- Cross-object field updates and roll-up summary formula can be created

Lookup relationship

- Loosely coupled
- This relationship can be created when detail object records can exists independently and at times linked to master
- Detail object ownership and security is independent of Master
- Cross-object field updates and roll-up summary are not possible

Type of Relationship Fields

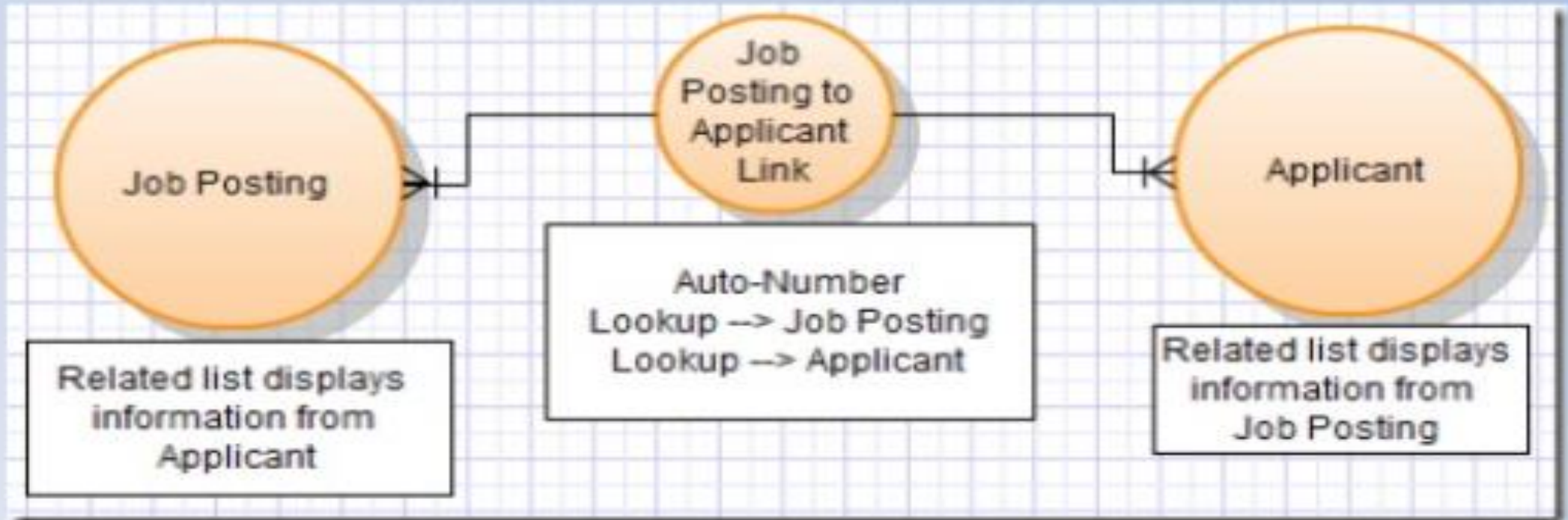
Junction object

- Create junction object
- Create 2 master – detail relationships
- Customize related lists
- The first master-detail relationship you create on your junction object becomes the primary relationship. This affects the following for the junction object records
- Look and feel: The junction object's detail and edit pages use the color and any associated icon of the primary master object.
- Record ownership: Junction object record ownership is inherited from the first master object

Many-to-Many relationship

Two Master-Detail Relationships

Required 3rd object called junction object



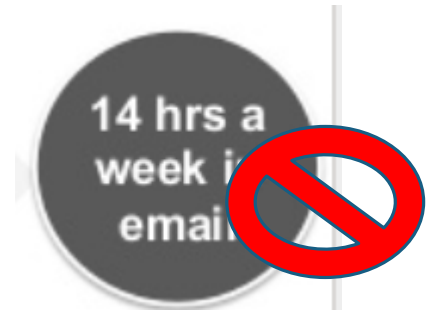
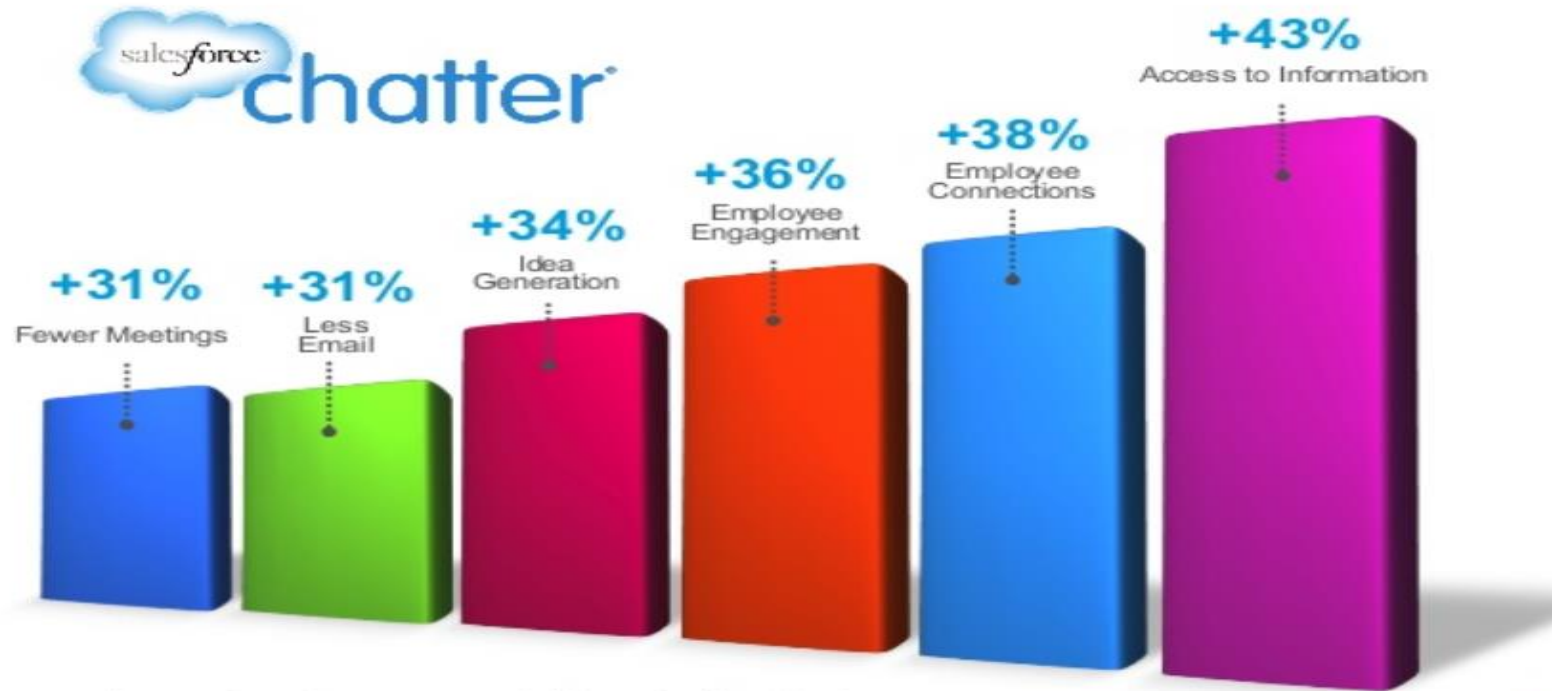
Field History tracking

- * Upto 20 fields can be tracked on each object using field history tracking,
- * Who ,when and what changes were made.
- * Helps with record level audit
- * Lab:Configure the layout to show tracking records in related list

Chatter usage

- * • Broadcast messages with high significance but low priority
- * • Peer recognition • HR updates
- * • Department or team KPIs and company-wide performance updates
- * • Industry or job-specific articles and videos that promote innovation
- * • Presentation slides
- * • Group voting and polls
- * • Which logo redesign do you like best?
- * • Idea generation
- * • What should we include in our meeting agenda?
- * • What problems are customers having we can solve?
- * • Asking non-urgent questions to other departments or subject matter experts
- * • Use the “knowledgeable people” feature to find people who can answer questions on specific topics
- * • Project team and committee updates, collaboration between meetings
- * • Questions and answers are searchable
- * • Post links or files relevant to topic
- * • Post updates to action items discussed during meetings
- * • Post files, status reports, questions and project updates

Benefits to companies

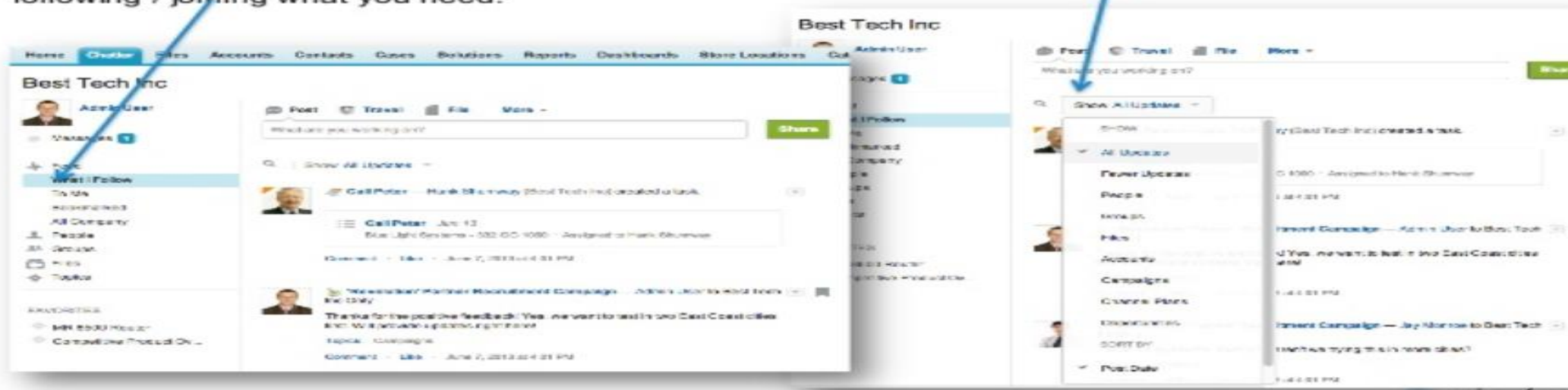


Chatter Feed

The feed is a stream of everything in Chatter that's relevant to you. It delivers the right content and insights to you when you need it, the way you need it

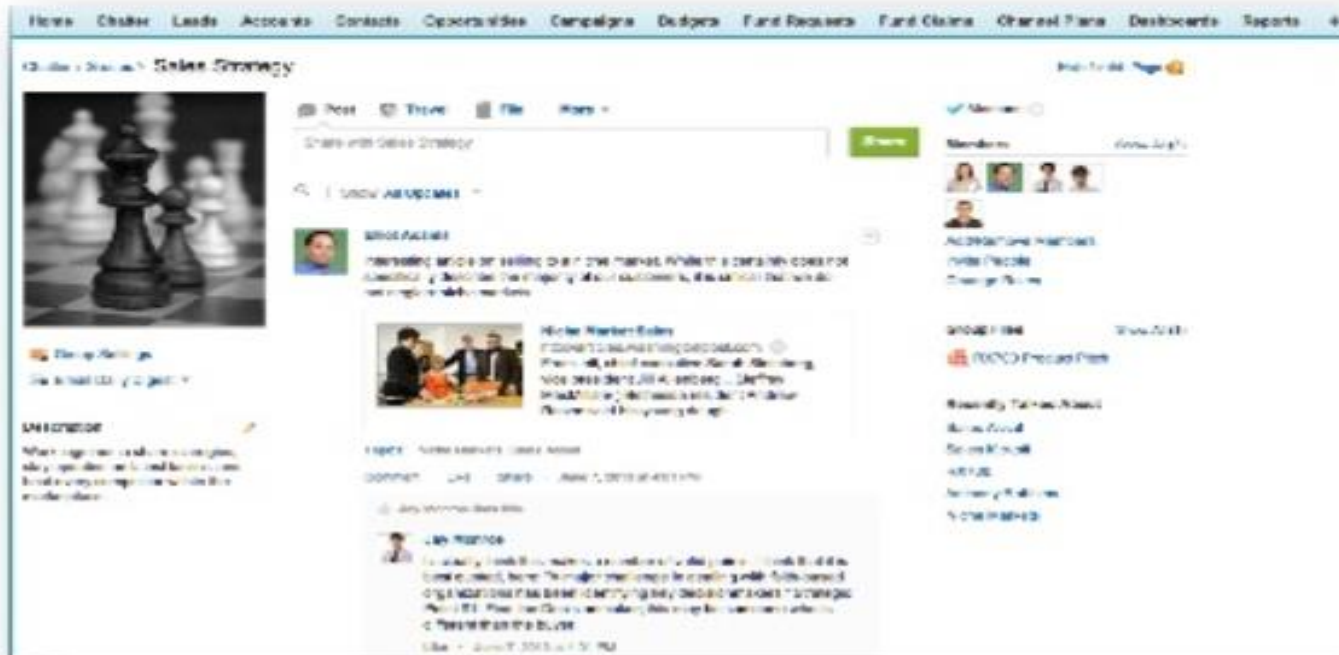
Your feed is made up of posts made by people and objects you follow, and groups you are a member of. You have **full control** of what goes into it by following / joining what you need.

You can tweak the feed as you see fit to display all of the posts you subscribed to, or just some



Chatter Groups

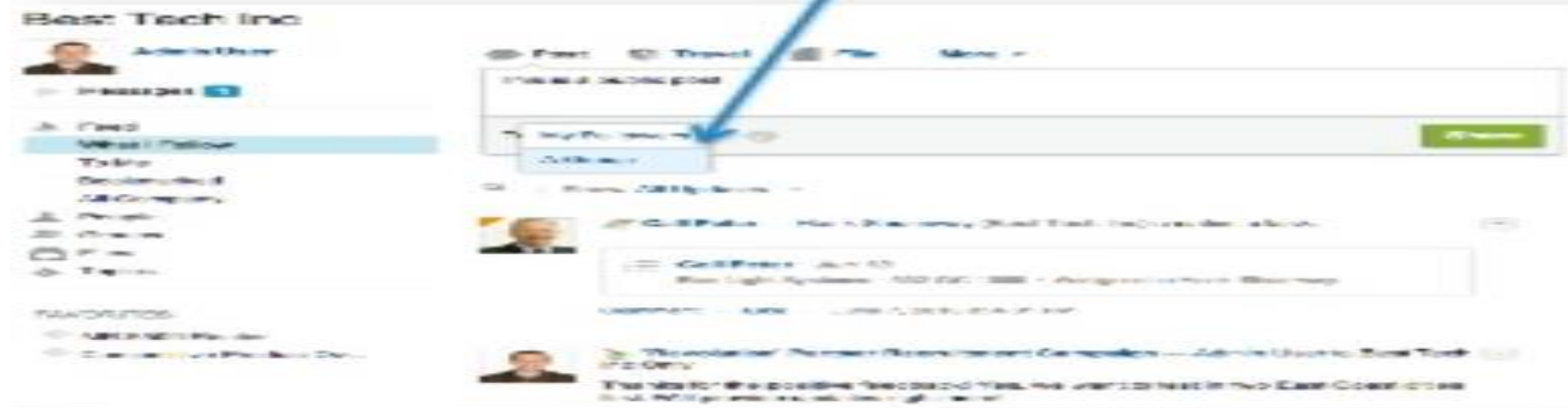
Groups help organize content and discussions. Think of them as containers of knowledge. Each group can be public or private. Each group has its own feed, and by joining a group, you get all posts from that group in your Chatter feed. You can also proactively navigate to any group and check out what's there – if you have the right permissions.



In the right side of the group, you can check out other group members, popular files and topics

Chatter post

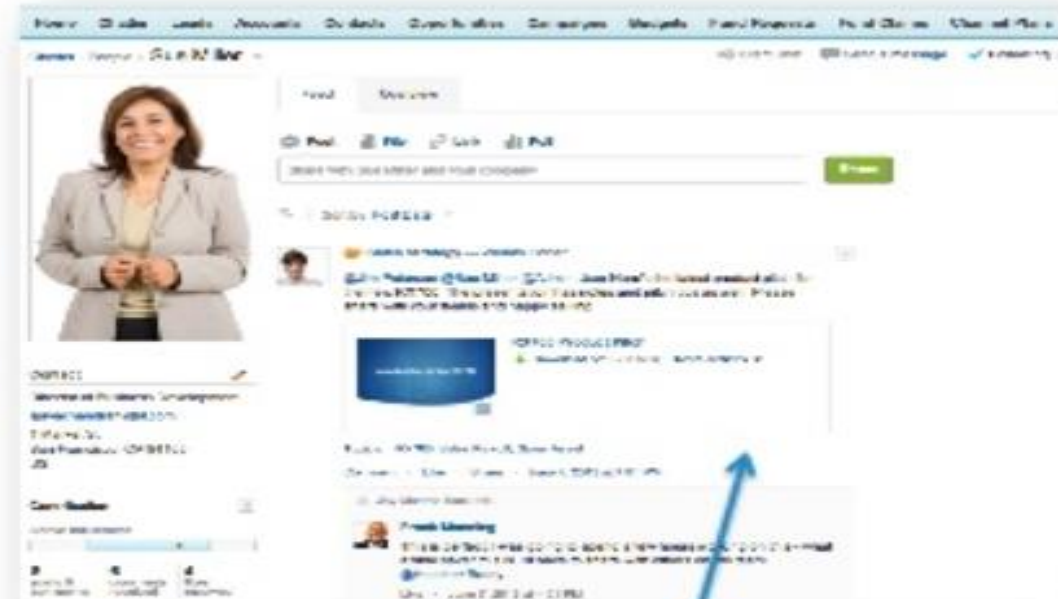
Posts are the building blocks of feeds and groups. You can post anything: a file, a text post, a picture, a URL. Public posts can be made into groups or to people's profiles. Everyone in that group or following that person can see them.



People and Profile

Each person in your network has a profile – just like on your consumer social networks . When you follow a colleague, you will get his / her posts in your “Followed” feed.

You can read about your colleague to decide if you want to connect with and/or follow. It's a great way to get connected to people you have never met before – and ones you have!



Everything this person posts goes into his / her feed

Chatter files

Files are the lifeblood of a company. To start collaborating, just head over to Files tab and peruse existing files – or upload a new one!

can also be seen on the right

The screenshot displays the Chatter Files interface. At the top, a navigation bar includes tabs for Home, Chatter, Files, Accounts, Contacts, Cases, Solutions, Reports, Dashboards, Store Locations, and Catalogs. The 'Files' tab is selected. Below the navigation bar, the 'Files I've created' section shows a list of files. The first file, 'Tristar Win/Loss', is highlighted. To the right, a detailed view of this file is shown, featuring a large image of a chessboard and the title 'Tristar Win/Loss Report'. The file details include a download size of 10.3 MB, a file sharing link, and a version history. On the right side of the interface, there is a sidebar with sections for 'Members' (showing 22411 members), 'Add New Members' (with a 'Change Roles' button), and 'Recently Talked About' (listing various topics and members).

Files I've created

Upload Files or drag and drop to add files...

Actions

Tristar Win/Loss

Downloaded 10.3 MB

File Sharing Details

Version 1

Downloaded

Tristar Win/Loss Report

Members

Add New Members

Recently Talked About

The file info page has all the associated information

Topics

Topics help organize posts in a feed, according to.. Their topics! You can discover popular topics through the Topics feed, or through global search. If you follow a topic, posts tagged with that topic will appear in your feed.

The screenshot shows a user profile for 'Best Tech Inc' with a profile picture of a man and the name 'Admin User'. The interface includes a left sidebar with navigation options: Feed, People, Groups, Files, Topics, and All Topics (highlighted). Below the sidebar is a 'FAVORITES' section with two items: 'NR 6600 Router' and 'Competitive Product Ov...'. The main content area is titled 'Topics' and features a search bar with the placeholder 'Search Topics' and a dropdown menu set to 'Show All sorted by People Talking About This'. Below the search bar is a list of topics, each with a title, a count of people talking about it, and a 'Follow' button.

Topic	People Talking About This	Action
Interworld	5 people talking	Follow
Financial Services	5 people talking	Follow
Competitive Product Overview	5 people talking	Follow
Acme-Best Tech Q&A	5 people talking	Follow
Sales Kickoff	4 people talking	Follow
HP700 Laptop	4 people talking	Follow
Battery Light Flickers	4 people talking	Follow
Sales Award	4 people talking	Follow
Campaigns	4 people talking	Follow
Deals	3 people talking	Follow

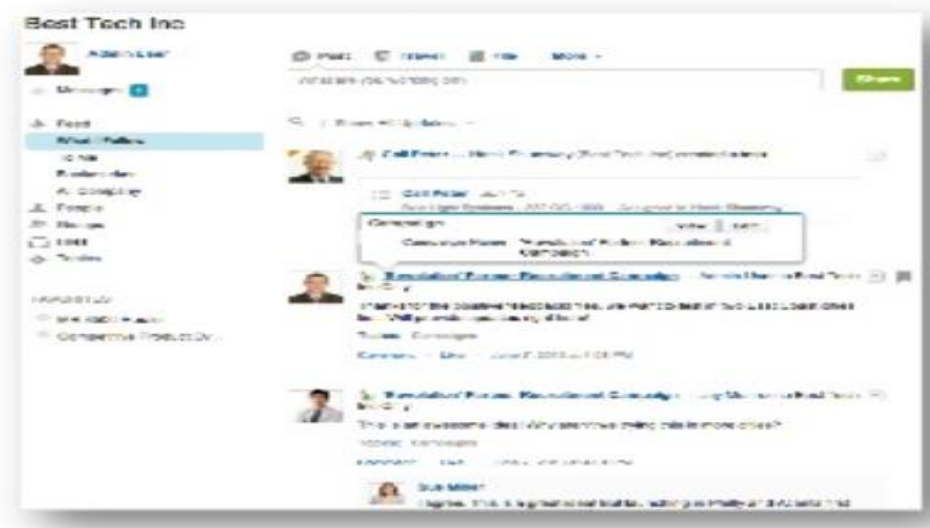
Object tracking with Chatter

Like files, business objects are where work happens in your company. Just like people, files and groups, you can follow objects so that any changes and conversations can post to your feed. An object can be:

.. an account, opportunity or case, or...



.. a campaign — or anything that's important to you!



Email Settings 1

Email me when someone:

Follows

Follows me



Posts or Likes

Posts on my profile



Shares a post I made



Likes a post or a comment I made



Comments

Comments on my status or a change I made



Comments on a post on my profile



Comments after me



Comments on an item I bookmarked



Comments on an item I like



Mentions or Messages

Mentions me in a post



Mentions me in a comment



Sends me a message



Set frequency for personal digest:

8

Daily

Weekly

Never

Navigate to Setup > My Chatter Settings > Chatter Email Settings

Top tip: Set as many or as few notifications as you would like. You will fine-tune your settings over to receive more or fewer notifications

Manage settings per group

- On each post – I'm THE expert, critical to my job
- Daily – I want to stay on top of developments
- Weekly – I want to catch up periodically
- Never – I occasionally ask questions and don't mind updates it in my feed

Groups

Set default frequency for groups I join:

1

Email on each post



Daily digests



Weekly digests



Never

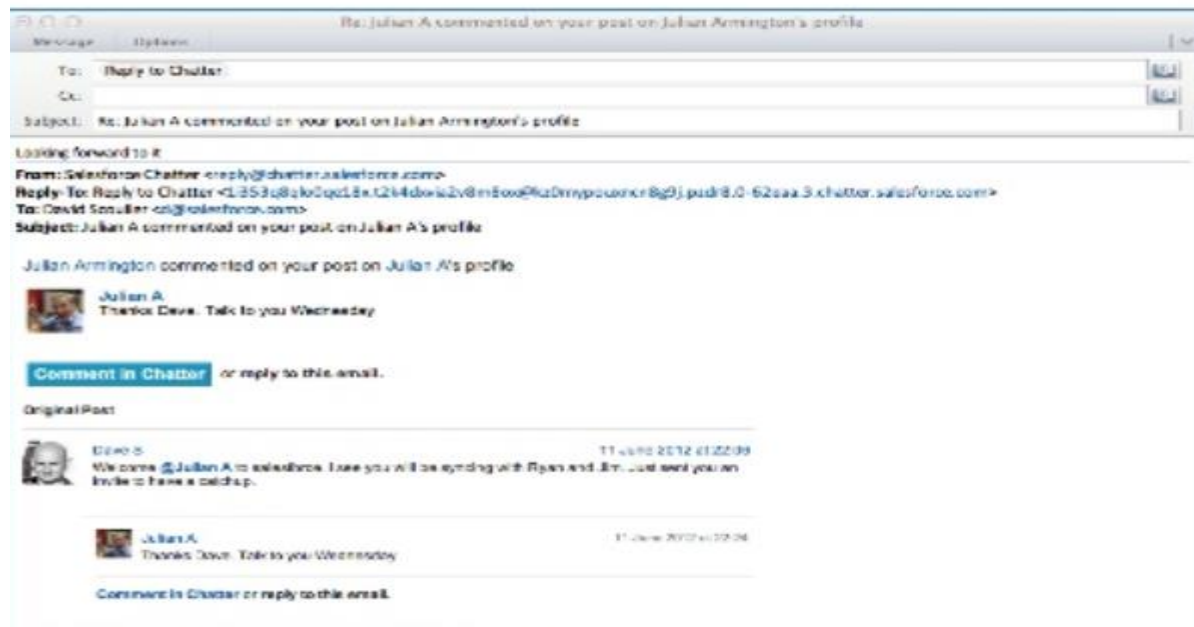


Chatter Group	Email on Each Post ¹	Daily Digests ¹	Weekly Digests ¹	Never
Competitive Experts	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Customer Collaboration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
DJS Sec	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Product Experts	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Sales Strategy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Email settings 2

Respond Right From Email

You can reply to an email notification from Chatter, and your reply will show up as a comment. This is a great tool for easing e-mail centric participants productive on your mobile device.



Lab

1. Fill out your profile and upload a picture
2. Set your email settings
3. Follow your manager and colleagues
4. Join your team, department and project groups
 - If there isn't an existing group, start one!
5. Follow your customer records
6. Do a search on a topic
 - Follow topics
 - Join groups
 - Follow experts