Object Configurations

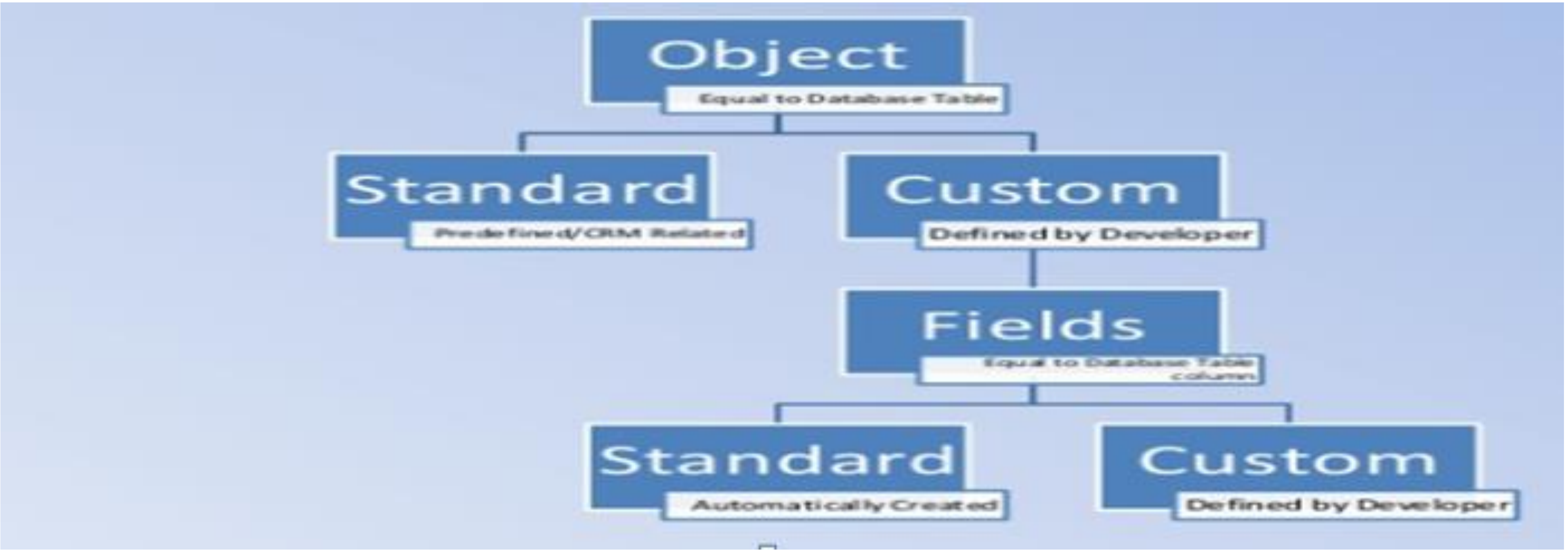
* What are objects
* What are standard and custom objects and fields
* How to create custom fields in std objects
* How to create custom objects and custom fields
* Field Data types and key properties(required,unique,foreign key)
* Advanced data types (automatic validation,formatting)
* UI:Page Configuring 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

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

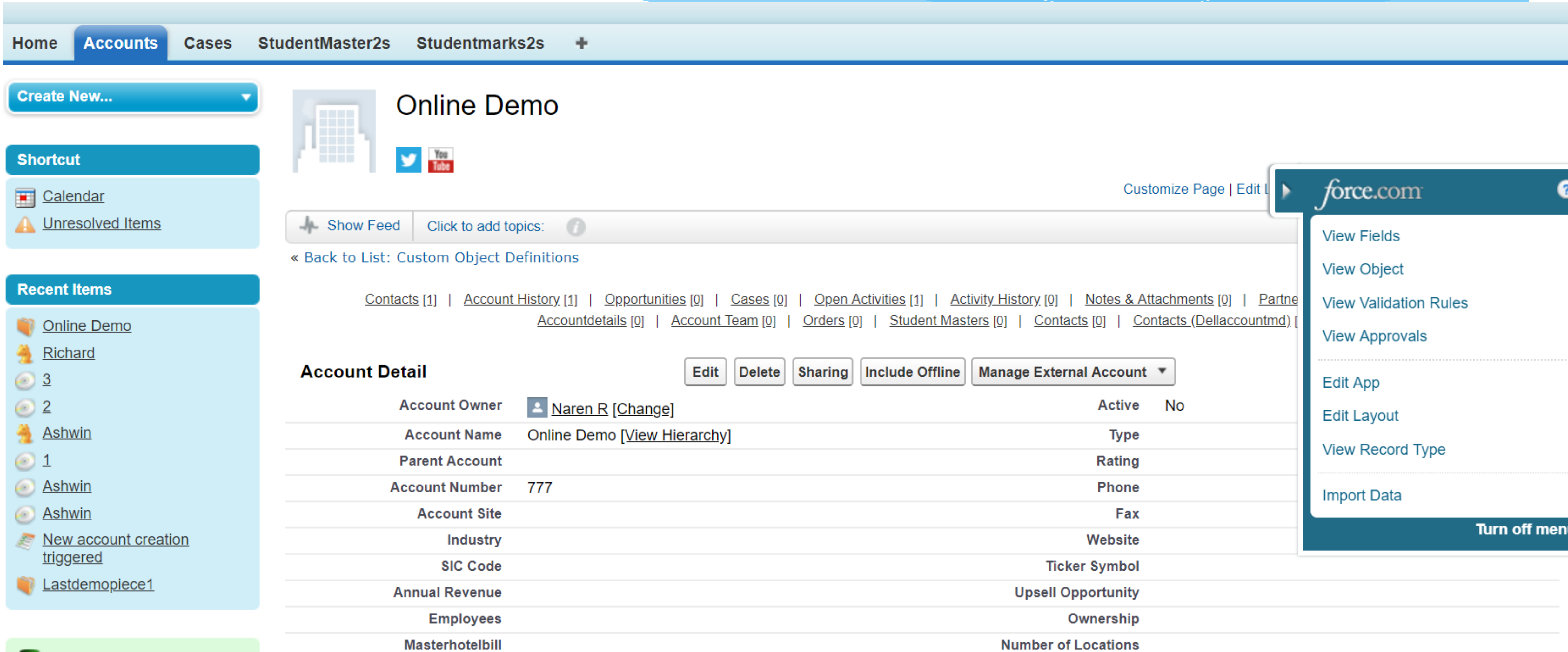
- Each object can have multiple record types
- Each record type can be assigned to particular profile .
- So user with the right profile can access the right record types.
- Record type can be used to show particular layout or list of values
- Profiles control what apps,layouts,object level access,we 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

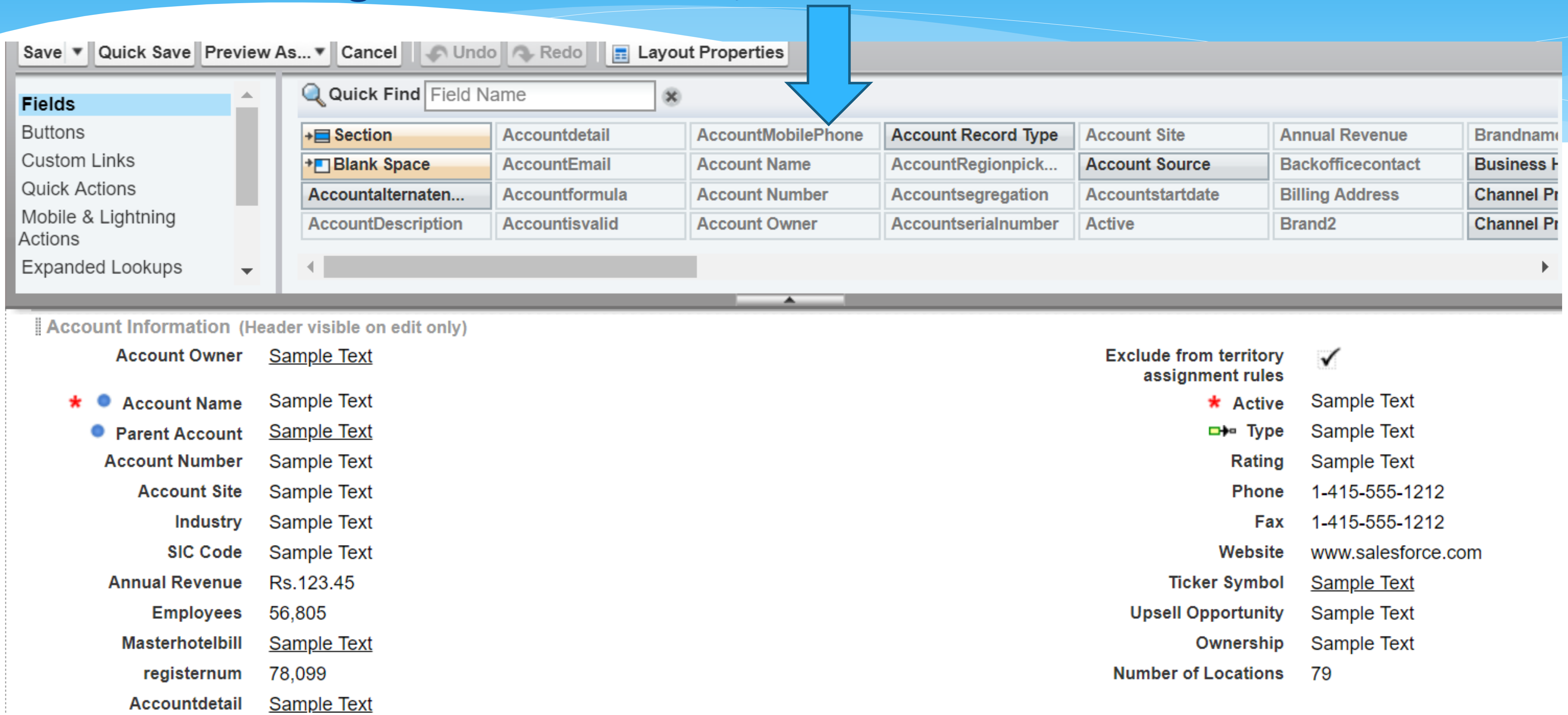
Edit page layouts

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

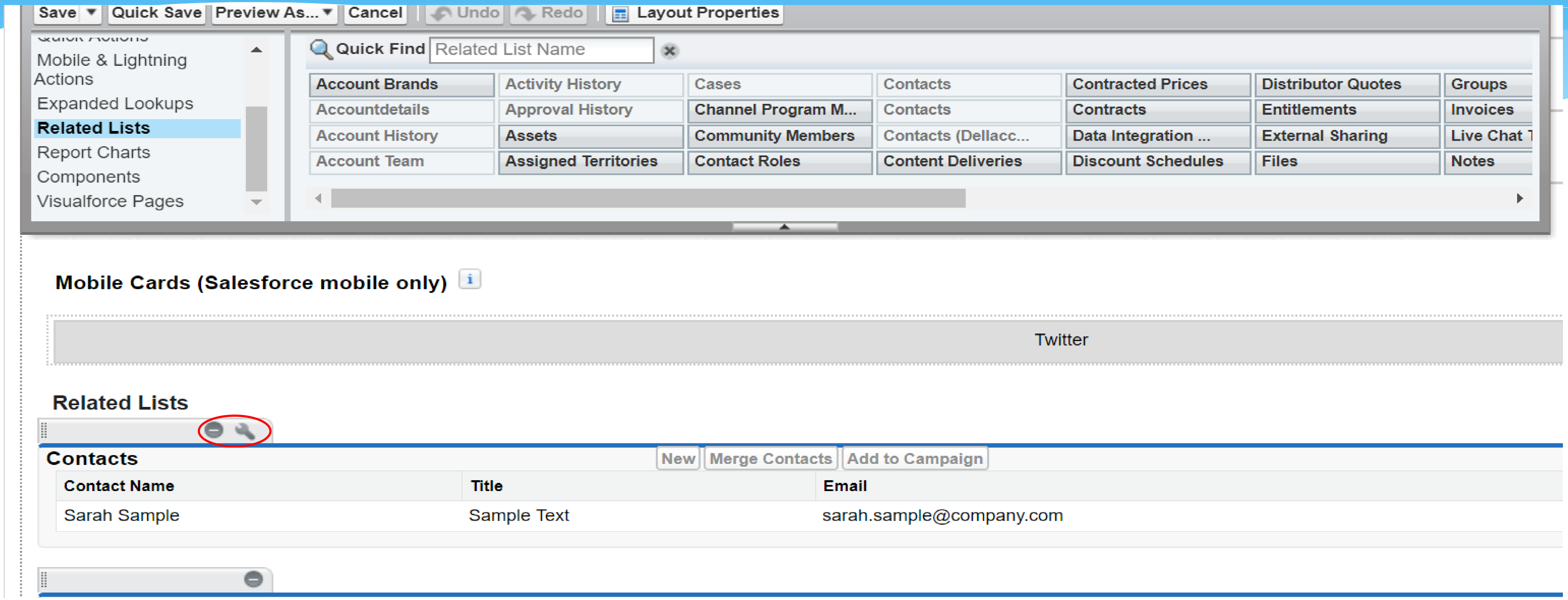


Format fields/sections/spaces

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



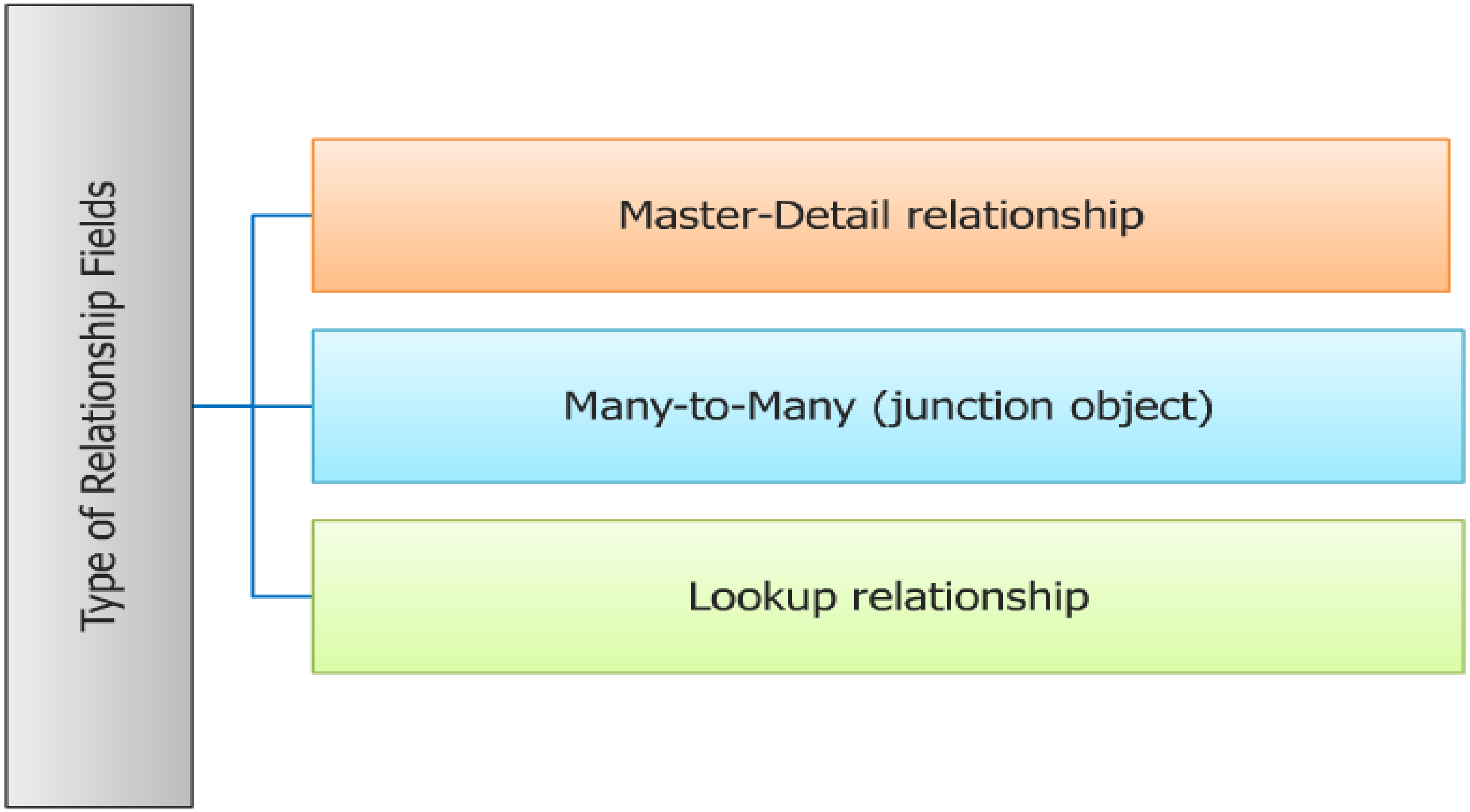
Configure the related lists if the object has MD or lookup relation



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

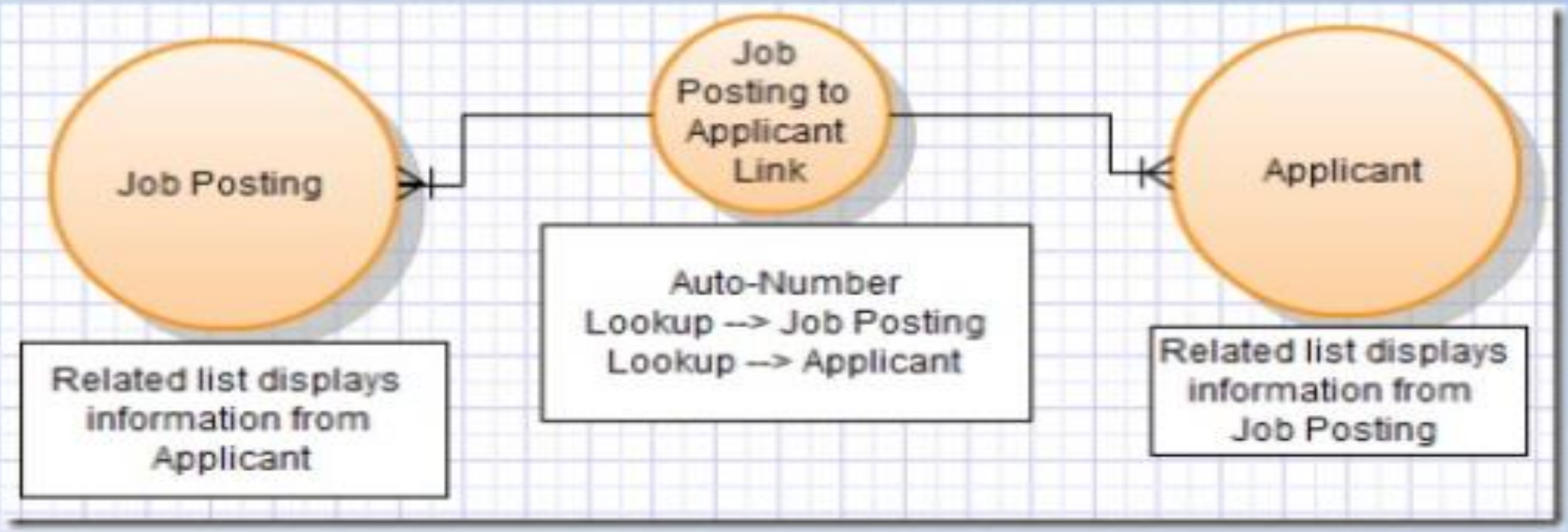
→Look and feel: The junction object's detail and edit pages use the color and any associated icon of the primary master object.

→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



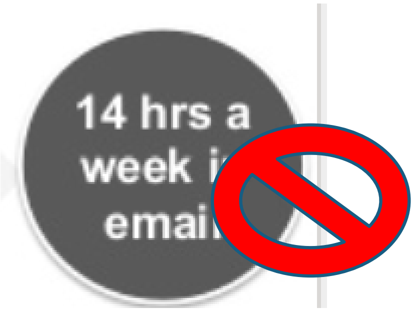
Field History tracking

* 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

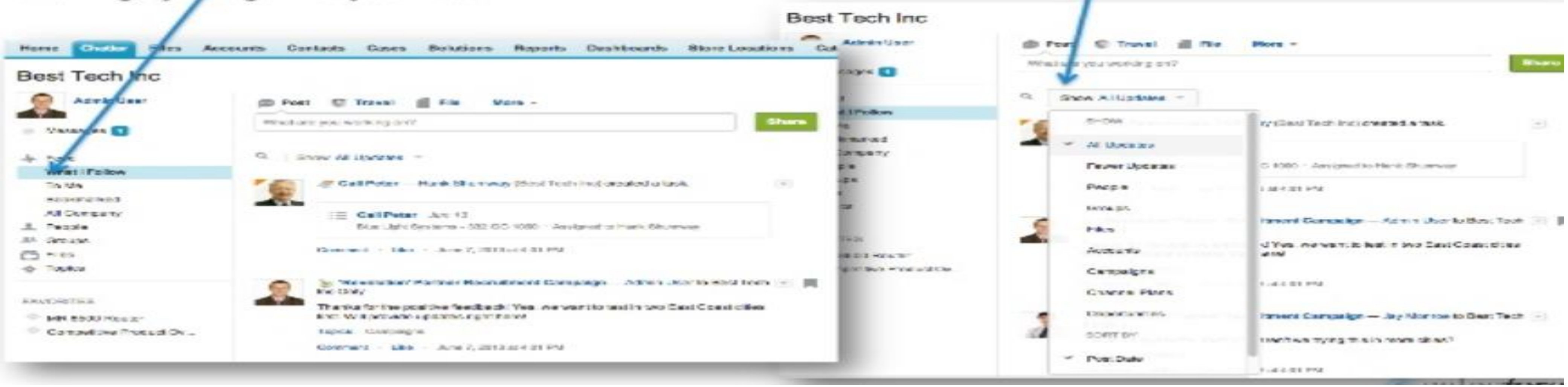


Chatter Feed

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

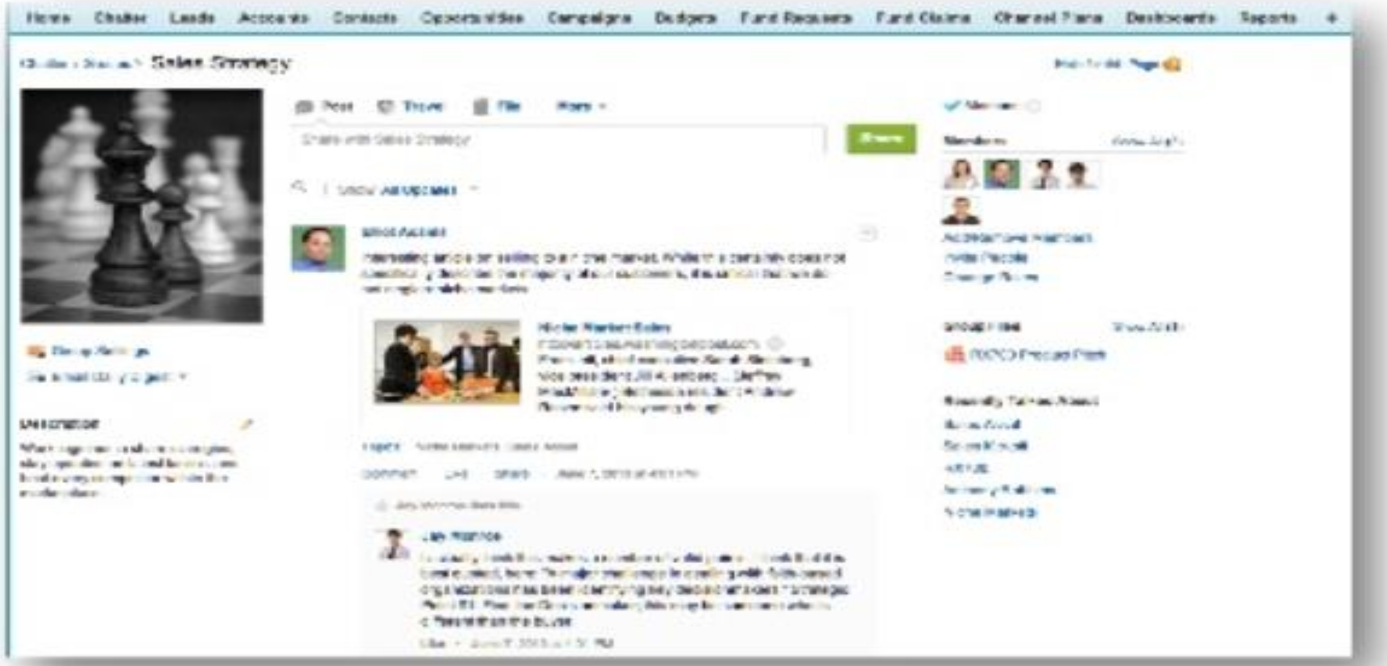
Your feed is made up of posts made by people and objects you follow, and groups you are a member of. You have ***full control*** of what goes into it by following / joining what you need.

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



Chatter Groups

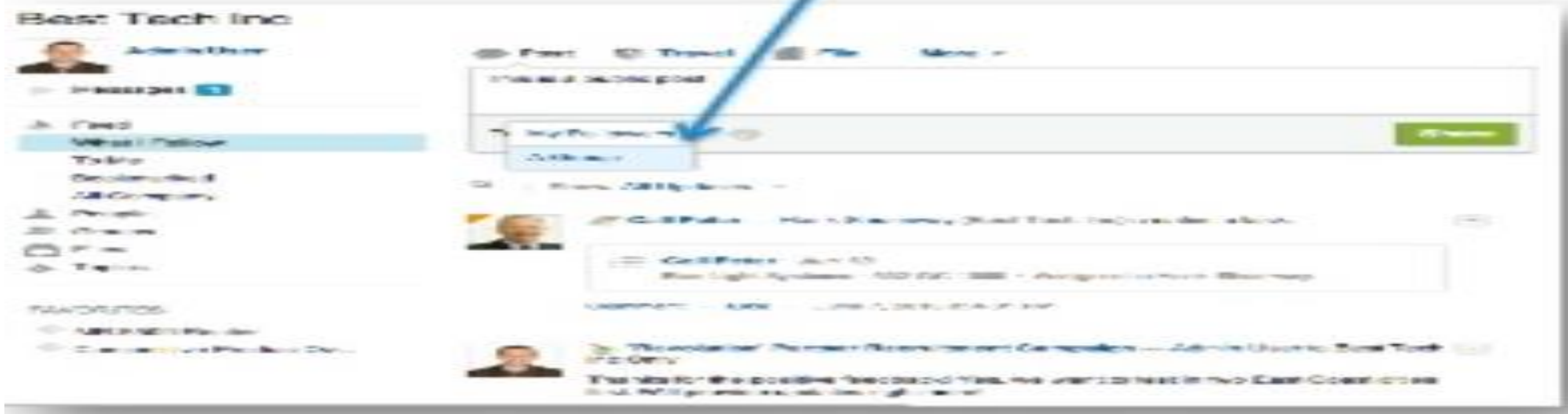
Groups help organize content and discussions. Think of them as containers of knowledge. Each group can be public or private. Each group has its own feed, and by joining a group, you get all posts from that group in your Chatter feed. You can also proactively navigate to any group and check out what's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

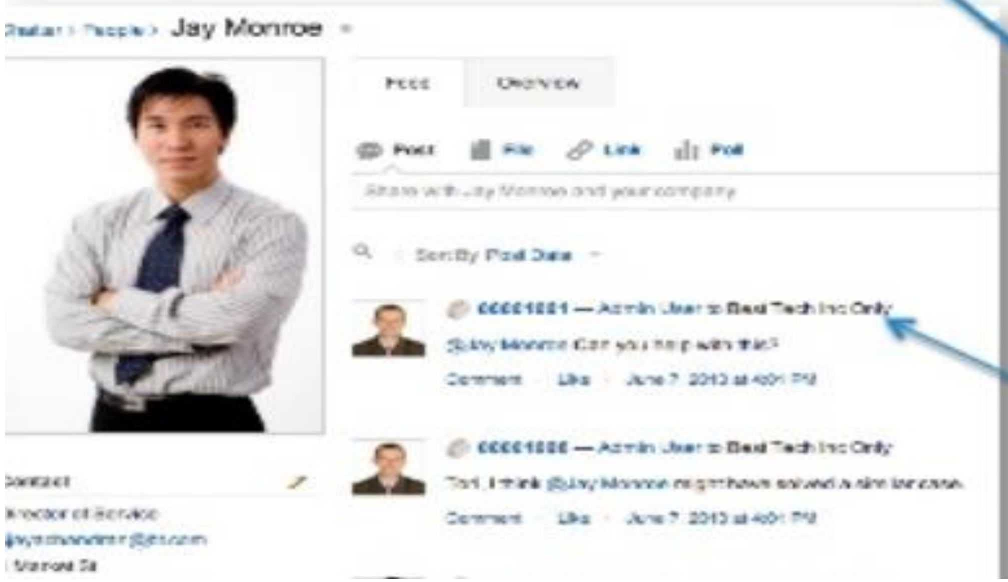
Posts are the building blocks of feeds and groups. You can post anything: a file, a text post, a picture, a URL. Public posts can be made into groups or to people's profiles. Everyone in that group or following that person can see them.



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!

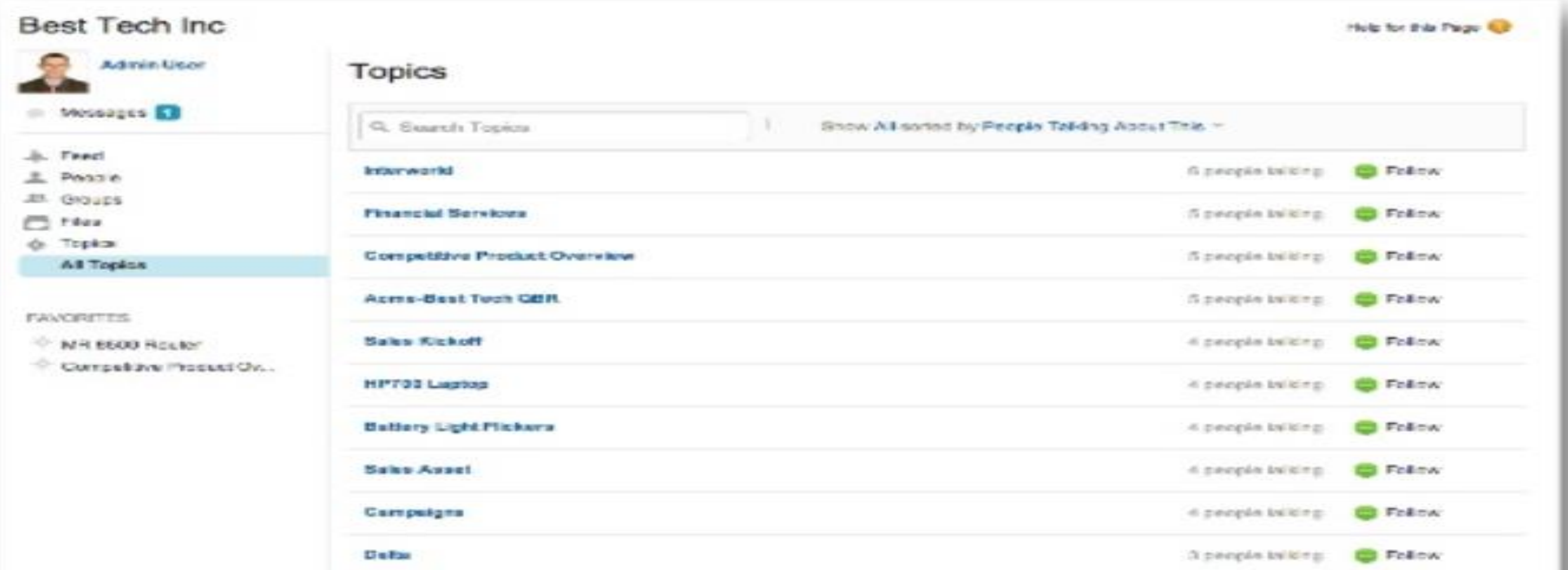


Everything this person posts goes into his / her feed

Chatter files

Topics

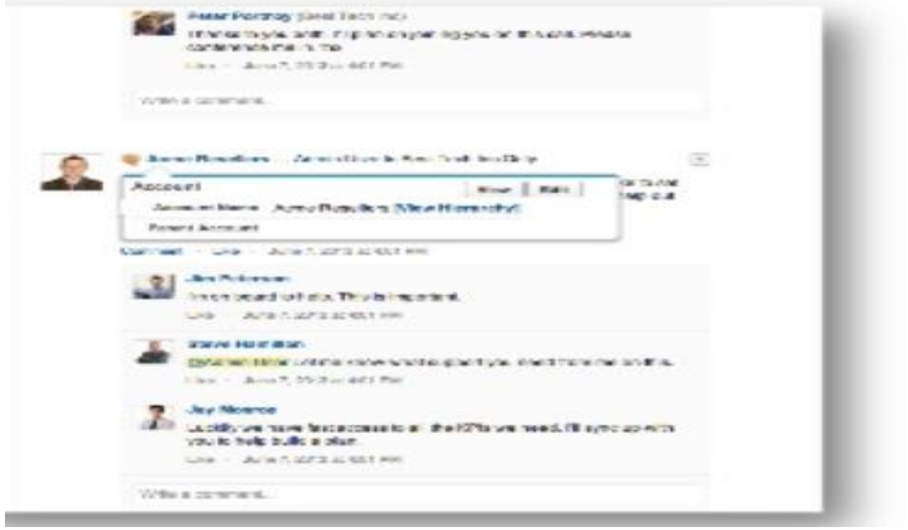
Topics help organize posts in a feed, according to.. Their topics! You can discover popular topics through the Topics feed, or through global search. If you follow a topic, posts tagged with that topic will appear in your feed.



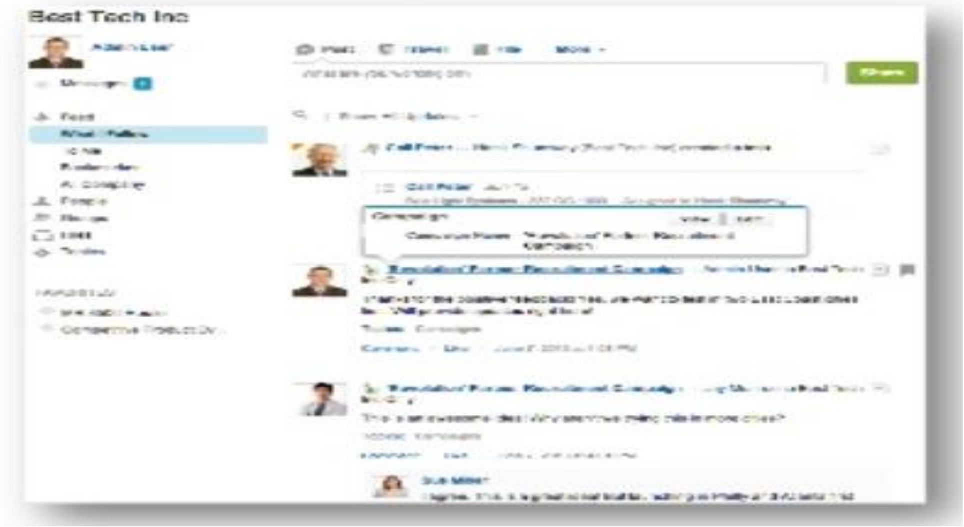
Object tracking with Chatter

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:
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 jo
- 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

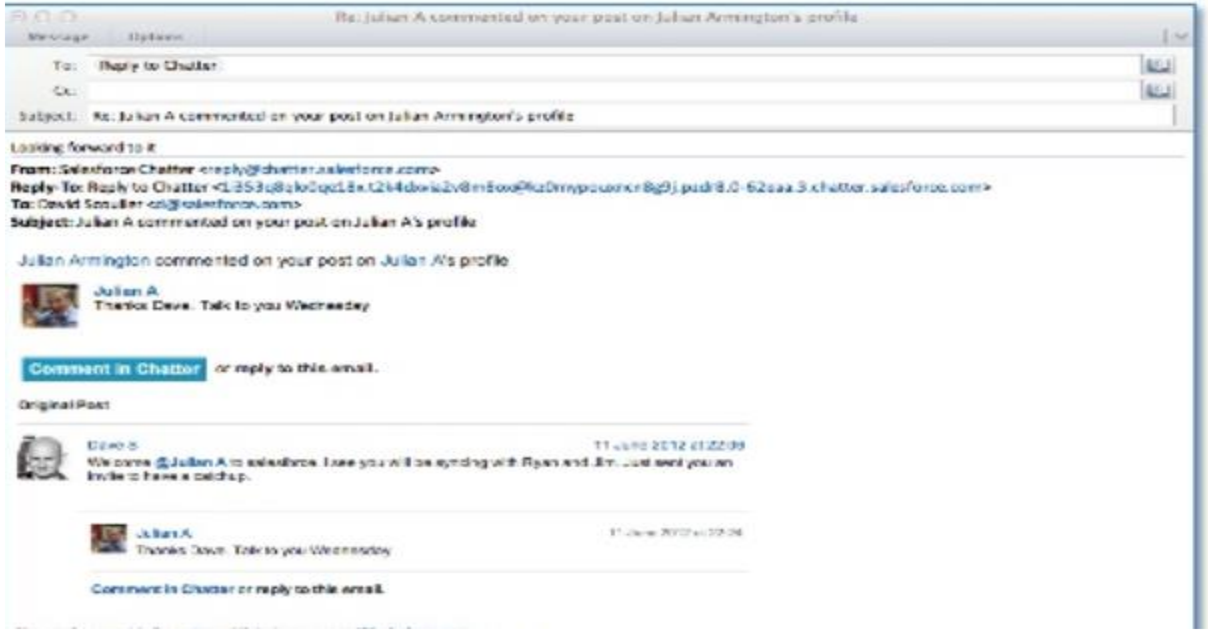
Set default frequency for groups I join:
Email on each post ○
Daily digests ●
Weekly digests ○
Never ○

Chatter Group	Email on Each Post	Daily Digests	Weekly Digests	Never
Competitive Experts	●	○	○	○
Customer Collaboration	○	○	○	●
DJS Sec	○	●	○	○
Product Experts	○	○	●	○
Sales Strategy	○	○	○	●

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