Getting Started with SalesForce CRM

Getting Started with SALESFORCE Part VII
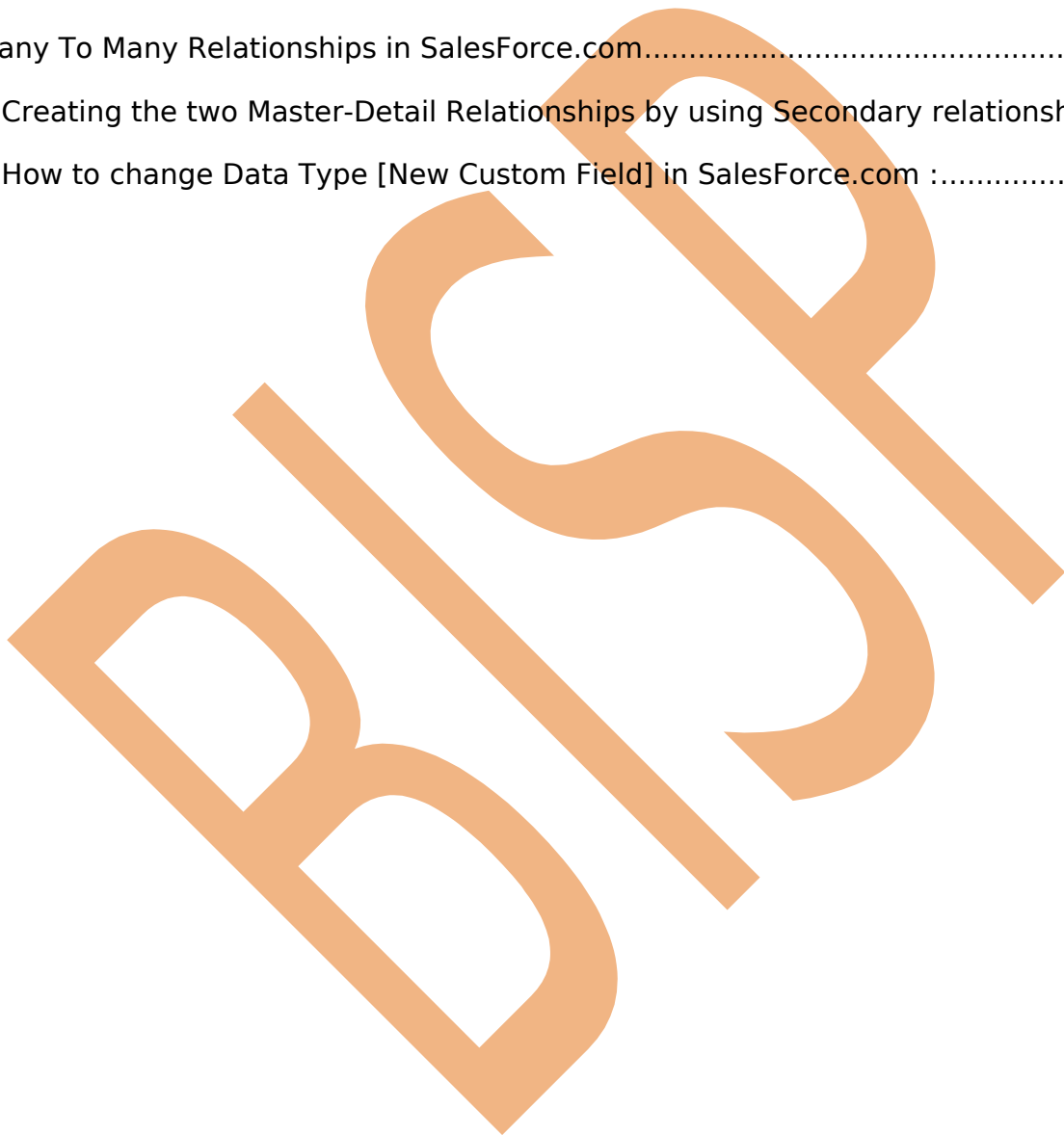
Description:

BISP is committed to provide BEST learning material to the beginners and advance learners. In the same series, we have prepared a complete end-to end Hands-on Beginner's Guide for SalesForce. The document focuses on URL Links, Many to Many Relationship and Changing Data Type. Join our professional training program and learn from experts.

History:

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Contents

URL Link to a Custom Field in SalesForce

Hyperlink / URL Link to a Custom Field allow to user enter any valid website address. if user add any valid web site in SalesForce, URL Link to a Custom Field it open new tab in same browser.

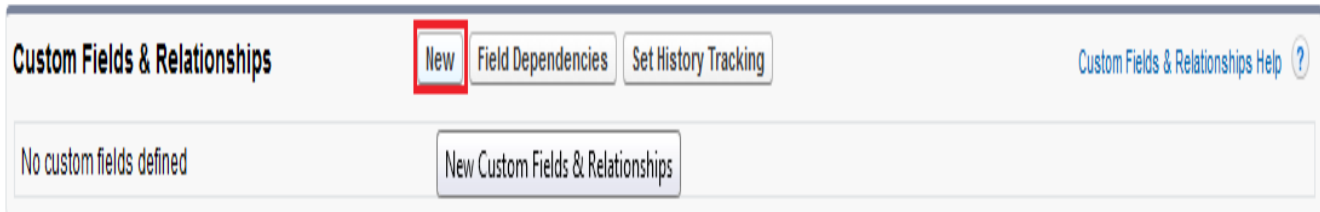## How to Create URL Link to a Custom Field in SalesForce :

You can add URL Link to a Custom Field in any **New Custom Tab** For Ex :-(I will add employment website **new custom Tab**).

Step 1 :-

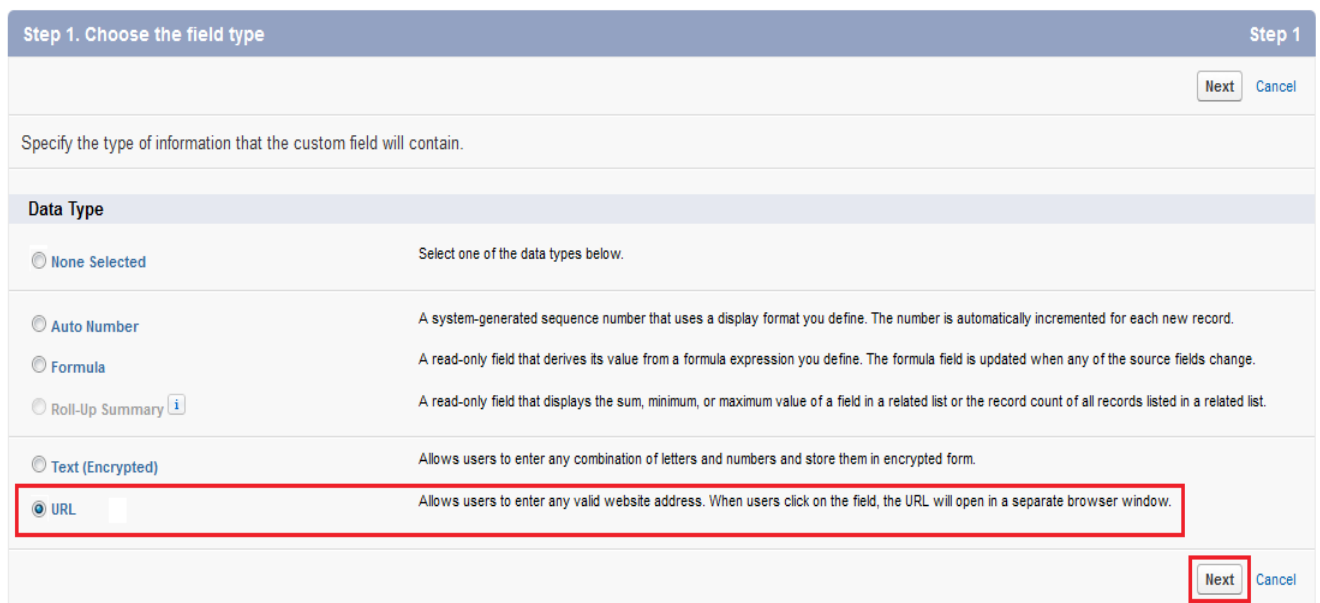**For Creating URL Link to a Custom Field in Sales Force**

click to **Setup** -> **Create** -> **Objects** -> Click to any **Custom Object** (Ex :- employment website)
There is you can find **Custom Fields & Relationships** in this Custom Fields & Relationships click to **New** button you can see below screen.

Custom Fields & Relationships	New	Field Dependencies	Set History Tracking		Custom Fields & Relationships Help ?
No custom fields defined		New Custom Fields & Relationships			

Step 2 :-
After click **New** button open new page called as **New Custom Field** in this page you can see many data type, select one checked **URL** radio button and click to **Next** button you can see below.

Employment website
New Custom Field

Help for this Page ?

Step 1. Choose the field type	Step 1

Next Cancel

Specify the type of information that the custom field will contain.

Data Type

○ None Selected	Select one of the data types below.
○ Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
○ Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
○ Roll-Up Summary ⓘ	A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
○ 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

Step 3 :-

In this page fill Field Label, Field Name, Description, Help Text and click to **Next** button.

Step 4 :-
Click to **Next** button.

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

Previous | Next | Cancel

Field Label	website
Data Type	URL
Field Name	website
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
Authenticated Website	✔	☐
Contract Manager	✔	☐
Custom: Marketing Profile	✔	☐
Custom: Sales Profile	✔	☐
Custom: Support Profile	✔	☐
Customer Portal Manager Custom	✔	☐
Customer Portal Manager Standard	✔	☐
Force.com - App Subscription User	✔	☐
Force.com - Free User	✔	☐
Gold Partner User	✔	☐
High Volume Customer Portal	✔	☐
Marketing User	✔	☐
Partner App Subscription	✔	☐
Read Only	✔	☐
Silver Partner User	✔	☐
Solution Manager	✔	☐
Standard Platform User	✔	☐
Standard User	✔	☐
System Administrator	✔	☐

Step 5 :-

Click to **Save** button. save this URL data type.

Step 4. Add to page layouts		Step 4 of 4

Previous | Save & New | Save | Cancel

Field Label	website
Data Type	URL
Field Name	website
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field	Page Layout Name
✔	Employment website Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous | Save & New | Save | Cancel

Step 6 :-

After click to Save button, you click on custom tab (Ex :- Employment websites) and click to New button you can see below.

Step 7 :-

After click on New button, then fill Employment Name, Website Address and click to Save button.

Step 8 :-

You can click on Website Address, you can see that web site open new tab in same browser.

Click here on this link

Many To Many Relationships in SalesForce.com

You can use master-detail relationship to many-to-many relationship between any two objects.

A many-to-many relationship allows each record of one object to be linked to multiple records

from another object.

1. To create a many to many relationship you need to create a third custom object called as a(junction object.)

between the two objects and create two master detail relationship on it.

2. a). Primary relationship.

   b). Secondary relationship.

3. The junction object (if not assigned a tab) will inherit the style (color and icon) on the primary (object)

4. if the primary relationship is deleted, the secondary relationship becomes the primary relationship automatically.

Junction Object :

A custom object with two master-detail relationships Using by junction object, you can model a many-to-many relationship between two objects

Step 1 :-
 Creating the Junction Object :
   Click **Setup** -> **Create** -> **Objects**
   Click New Custom Object (Ex :- Job Posting)
you can see below.

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. Tell me more! Don't show this message again

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information | = Required Information

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

Label | Job Posting | Example: Account
Plural Label | | Example: Accounts
Starts with vowel sound | ☐

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

Object Name | Job_Posting | 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-- ▾

Enter Record Name Label and Format

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

Record Name | Job Posting Name | Example: Account Name
Data Type | Auto Number ▾
Display Format | JP-{000} | Example: A-{0000} What Is This?
Starting Number | 1

Optional Features

☑ Allow Reports
☑ Allow Activities
☑ Track Field History

Deployment Status What is this?

○ 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

Save Save & New Cancel

Step 2 :-

Creating the two Master-Detail Relationships by using Primary relationship :
On New Custom Page (Ex:- Employment websites) there is you can find **Custom Fields & Relationships**
and click to **New** button, You can see below.

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	Website Address	Website_Address__c	URL(255)		yogesh sharma, 10/5/2013 4:08 PM	☐
	Deleted Fields (1)					

Step 2(I) :-

Select Master-Detail Relationship and click to Next button.

Employment website
New Custom Field

Help for this Page ?

Step 1. Choose the field type	Step 1

Next   Cancel

Specify the type of information that the custom field will contain.

Data Type

○ None Selected	Select one of the data types below.
○ Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
○ Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
○ Roll-Up Summary ⓘ	A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
○ Lookup Relationship	Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
● Master-Detail Relationship	Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
• The relationship field is required on all detail records.
• The ownership and sharing of a detail record are determined by the master record.
• When a user deletes the master record, all detail records are deleted.
• You can create rollup summary fields on the master record to summarize the detail records.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Step 2(II) :- Select **Related To** any option on dropdown list(Ex:- I am select Position custom object).

Job Posting
New Relationship

Help for this Page ?

Step 2. Choose the related object	Step 2 of 6

Previous   Next   Cancel

Select the other object to which this object is related.

Related To   [Postion ▼]   ◄——   Click here to select you Related To list.

Previous   Next   Cancel

Step 2(III) :-

Fill all the field's and click to Next button.

Previous | Next | Cancel

Field Label	Postion
Field Name	Postion
Description	
Help Text	
Child Relationship Name	Job_Postings

Sharing Setting — Select the minimum access level required on the Master record to create, edit, or delete related Detail records:

○ Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.

● Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting — ☐ Child records can be reparented to other parent records after they are created

Lookup Filter

Optionally, create a filter to limit the records available to users in the lookup field. Tell me more!

▸ Show Filter Settings

Previous | Next | Cancel

Step 2(IV) :-
Click to **Next** button.

Previous | Next | Cancel

Field Label	Postion
Data Type	Master-Detail
Field Name	Postion
Description	

These are the field-level settings for a Master-Detail relationship. They cannot be changed.

Field-Level Security for Profile	Visible	Read-Only
Authenticated Website	✔	☐
Contract Manager	✔	☐
Custom: Marketing Profile	✔	☐
Custom: Sales Profile	✔	☐
Custom: Support Profile	✔	☐
Customer Portal Manager Custom	✔	☐
Customer Portal Manager Standard	✔	☐
Force.com - App Subscription User	✔	☐
Force.com - Free User	✔	☐
Gold Partner User	✔	☐
High Volume Customer Portal	✔	☐
Marketing User	✔	☐
Partner App Subscription	✔	☐
Read Only	✔	☐
Silver Partner User	✔	☐
Solution Manager	✔	☐
Standard Platform User	✔	☐
Standard User	✔	☐
System Administrator	✔	☐

Step 2(V) :-
Click to **Next** button.

Step 5. Add reference field to Page Layouts   Step 5 of 6

Previous | Next | Cancel

Field Label	Postion
Data Type	Master-Detail
Field Name	Postion
Description	

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Field	Page Layout Name
✓	Job Posting Layout

Previous | Next | Cancel

Step 2(VI) :-
Click to **Save** button.

Step 6. Add custom related lists   Step 6 of 6

Previous | Save & New | Save | Cancel

Field Label	Postion
Data Type	Master-Detail
Field Name	Postion
Description	

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label   Job Postings

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List	Page Layout Name
☑	Postion Layout

☑ Append related list to users' existing personal customizations

Previous | Save & New | Save | Cancel

After click to Save button , you can create same second **Master-Detail Relationships** and Save.

Note:- You can only create two Master-Detail Relationships only for one object , after create two Master-Detail Relationships
you want to create third Master-Detail Relationships you not allow to create this detail when you click to create new Master-Detail Relationships you find these option is hide you can see.

You can see How to Relate :

Step 1:-

Click to custom tab which one you add on Master-Detail relationships (Ex: - Position Tab).

and go down you can find **New job Position** button click on this button.

Step 2 :-

Click on **Look up** button and open new page on this page you can select any web site name and click to Save button.

After that you can go second custom tab you can add these one (ex :- employment)

Click on this tab and click to any bind web site name and go to down and you can see that.
this is a secondary table click to job application id (ex :- JP-001) you can go primary table.

Note :- When I deleted Primary detail table Secondary detail table automatically assign as a primary detail table.

Creating the two Master-Detail Relationships by using Secondary relationship :

Note :- If create Master-Detail Relationships by using Secondary relationship it not possible by using Master-Detail Relationships if try to create it give you error message . you can see below.

How to Create Secondary relationship :
Step 1 :-
Click to **Setup** -> **Create** -> **Objects**
Then click on custom object (Ex :- employment website) there is find them **Custom Fields & Relationships** and click to **New** button.

Step 2(I) :-
Then Select **Lookup Relationship** and click to **Next** button.

Lookup Relationship — Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship — Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Step 2(II) :-

Select you option and click Next button.

Employment website
New Relationship

Help for this Page

Step 2. Choose the related object	Step 2

Previous   Next   Cancel

Select the other object to which this object is related.

Related To | Postion |

Click here to select you option.

Previous   **Next**   Cancel

Step 2(III) To Step 2(V) :- Some mediatory field fill and click to **Next , Next** button.

Step 2(VI) : - And last click to **Save** button save this Secondary Relationship. You can see below.

Employment website
New Relationship

Help for this Page

Step 6. Add custom related lists	Step 6 of 6

Previous   Save & New   Save   Cancel

Field Label	Postion
Data Type	Lookup
Field Name	Postion
Description	

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label | Employment websites |

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Related List	Page Layout Name
☑	Postion Layout

☑ Append related list to users' existing personal customizations

Previous   Save & New   **Save**   Cancel

Step 3 :-

After Save you can click on custom tab (Ex :-Employment website) and here you can add position .
There is you can write position and click to save button.

How to change Data Type [New Custom Field] in SalesForce.com :

If you want to change data type (New Custom Field) after create.
Scenario: I will create **Picklist** data type in **job application** and want to change this data type **Picklist** to **Picklist (Multi-Select).**

First you will create Pick list data type in job application (or you can create other custom tab) after that fallow some steps. you can see below.

There you can see that that is **picklist** in job application.

Job Application
JD-008

« Back to List: Custom Object Definitions

Open Activities [0] | Activity History [0] | Reviews [0]

Job Application Detail   [Save] [Cancel]

Job Application #	JD-008	Owner	🔴 yogesh sharma [Change]
Status	New		
cv.cover latter	Fifth		
Postion	sdfc developer		
Candidate	Y-002		
Candidate Name	suresh		
Min Pay of this position	Rs.30,000.00		
Total Rating ❓	0		
City	--None-- ▾ 🔄		
Created By	yogesh sharma, 9/3/2013 11:18 AM	Last Modified By	yogesh sharma, 9/3/2013 11:18 AM

[Save] [Cancel]

Step 1:-

Click to **Step** -> **Create** -> **Objects** -> select you **custom Objects**(Ex :- Job Applications)

After then you click on Edit button.

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	Candidate	Candidate__c	Lookup(Candidate)		yogesh sharma, 9/3/2013 10:57 AM	☐
Edit | Del	Candidate Name	Candidate_Name__c	Formula (Text) 🌿		yogesh sharma, 9/3/2013 11:35 AM	☐
Edit | Del | Replace	City	City__c	Picklist		yogesh sharma, 10/8/2013 10:30 AM	☐
Edit | Del	cv.cover latter	cv_cover_latter__c	Text Area(255)		yogesh sharma, 9/2/2013 3:35 PM	☐
Edit | Del	Min Pay of this position	Min_Pay_of_this_position__c	Formula (Currency) 🌿		yogesh sharma, 9/3/2013 11:37 AM	☐
Edit | Del	Postion	Postion__c	Lookup(Postion)		yogesh sharma, 9/3/2013 10:48 AM	☐
Edit | Del | Replace	Status	Status__c	Picklist		yogesh sharma, 9/2/2013 3:33 PM	☐
Edit | Del	Total Rating	Total_Rating__c	Roll-Up Summary (SUM Review)		yogesh sharma, 9/30/2013 11:15 AM	☐
	Deleted Fields (1)					

Step 2:-

Click on **Change Field Type** button.

Edit Job Application Custom Field
City

Help for this Page ⊘

Custom Field Definition Edit	Change Field Type Save Cancel

Field Information | = Required Information

Field Label | City | Data Type | Picklist
Field Name | City
Description |
Help Text |

Picklist Options

Change Field Type Save Cancel

Step 3:-
Select **Picklist(Multi-Select)** Radio Button and click to **Next** button.

○ Picklist — Allows users to select a value from a list you define.
◉ Picklist (Multi-Select) — Allows users to select multiple values from a list you define.
○ 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.
○ 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

Step 4 :-
In Visible Lines Field how many number you can want to visible there is enter number (for ex: - 5).
and click to **Next** button.

Help for this Page 📄

Step 2. Enter the details   Step 2 of 3

Previous   Save   Next   Cancel

Field Label | City | ⓘ

Below is a list of picklist values. Click Edit to change the name of the value or make it the default value.

Action	Values	Default	Chart Colors	Modified By
Edit	Del	Bhopal	☐	Assigned dynamically	yogesh sharma, 10/8/2013 10:30 AM
Edit	Del	Pune	☐	Assigned dynamically	yogesh sharma, 10/8/2013 10:30 AM
Edit	Del	Hyderabad	☐	Assigned dynamically	yogesh sharma, 10/8/2013 10:30 AM
Edit	Del	Chennai	☐	Assigned dynamically	yogesh sharma, 10/8/2013 10:30 AM
Edit	Del	Delhi	☐	Assigned dynamically	yogesh sharma, 10/8/2013 10:30 AM

Multi-select picklists are displayed in a scrolling box on edit pages.

Visible Lines |

How many lines you want to visible please enter numeric value here.

Field Name | City | ⓘ

Description |

Help Text | | ⓘ

Previous   Save   Next   Cancel

Step 5 :-
Click to **Save** button.

Edit Job Application Custom Field
City

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

Previous   Save   Cancel

Field Label	City
Data Type	Picklist (Multi-Select)
Field Name	City
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	☑	☐
Custom: Marketing Profile	☑	☐
Custom: Sales Profile	☑	☐
Custom: Support Profile	☑	☐
Force.com - App Subscription User	☑	☐
Force.com - Free User	☑	☐
Gold Partner User	☐	☐
Marketing User	☑	☐
Partner App Subscription	☑	☐
Read Only	☑	☐
Silver Partner User	☐	☐
Solution Manager	☑	☐

Chat

After that you can see that data type will change .
There you can see Data Type **Picklist** to **Picklist(Multi-list)** converted.

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	Candidate	Candidate__c	Lookup(Candidate)		yogesh sharma, 9/3/2013 10:57 AM	☐
Edit | Del	Candidate Name	Candidate_Name__c	Formula (Text) 🧪		yogesh sharma, 9/3/2013 11:35 AM	☐
Edit | Del | Replace	City	City__c	Picklist (Multi-Select)		yogesh sharma, 10/8/2013 11:09 AM	☐
Edit | Del	cv.cover latter	cv_cover_latter__c	Text Area(255)		yogesh sharma, 9/2/2013 3:35 PM	☐
Edit | Del	Min Pay of this position	Min_Pay_of_this_position__c	Formula (Currency) 🧪		yogesh sharma, 9/3/2013 11:37 AM	☐
Edit | Del	Postion	Postion__c	Lookup(Postion)		yogesh sharma, 9/3/2013 10:48 AM	☐
Edit | Del | Replace	Status	Status__c	Picklist		yogesh sharma, 9/2/2013 3:33 PM	☐
Edit | Del	Total Rating	Total_Rating__c	Roll-Up Summary (SUM Review)		yogesh sharma, 9/30/2013 11:15 AM	☐
	Deleted Fields (1)					