



Getting Started with SalesForce CRM

Getting Started SALESFORCE Part II

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 basic keywords, terminology and definitions one should know before starting SalesForce. **Join our professional training program and learn from experts.**

History:

Version	Description Change	Author	Publish Date
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BISP

Field Dependencies in Salesforce

Field Dependency called as picklist field dependencies in salesforce.com, picklist field is a dropdown list. you can select available value on picklist.

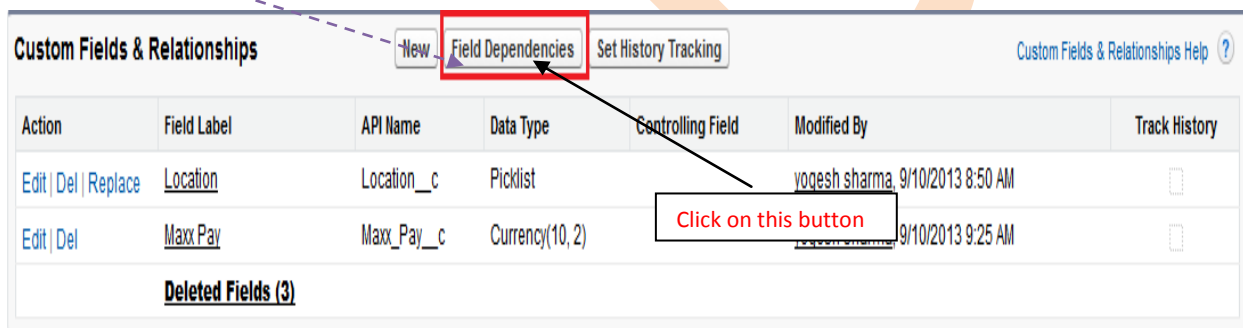
There is two type picklist field dependencies in Salesforce.com

1. Standard Picklist :- Standard Picklist you can select one value at one time.
2. Multi Select picklist :- Multi Select picklist you can select one or more values at one time.

Field Dependencies sub field(sub value) depend on Super field(Super value). Salesforce provide the allow to field dependency.

How To Create field dependencies in Salesforce :-

Click on **setup** -> **Build** -> **Create** -> **Objects** -> find **Custom Fields & Relationship** in section you can see **Field Dependencies** you can see blow image.



The screenshot shows the 'Custom Fields & Relationships' page in Salesforce. The 'Field Dependencies' tab is selected and highlighted with a red box. Below the tabs is a table with the following data:

Action	Field Label	API Name	Data Type	Controlling Field	Modified By	Track History
Edit Del Replace	Location	Location__c	Picklist		vogesh.sharma, 9/10/2013 8:50 AM	<input type="checkbox"/>
Edit Del	Maxx Pay	Maxx_Pay__c	Currency(10, 2)		vogesh.sharma, 9/10/2013 9:25 AM	<input type="checkbox"/>

Below the table, there is a section for 'Deleted Fields (3)'. A red box highlights the 'Field Dependencies' tab, and a callout box with the text 'Click on this button' points to it.

Click on **Field Dependencies** button and new show on blow screen. Then click to **New** button.

Department Field Dependencies

[Help for this Page](#)

[« Back to Custom Object: Department](#)

This page allows you to define dependencies between fields (e.g., dependent picklists).



The screenshot shows the 'Department Field Dependencies' page. The 'Field Dependencies' section is visible, and a red box highlights the 'New' button. Below the button, the text 'No dependencies defined.' is displayed.

There is two field's **Controlling field** and **Dependent field** choose field's and click to **Continue** button.

New Field Dependency

[Help for this Page](#) ?

Create a dependent relationship that causes the values in a picklist or multi-select picklist to be dynamically filtered based on the value selected by the user in another field.

- The field that drives filtering is called the "controlling field." Standard and custom checkboxes and picklists with at least one and less than 300 values can be controlling fields.
- The field that has its values filtered is called the "dependent field." Custom picklists and multi-select picklists can be dependent fields.

Step 1. Select a controlling field and a dependent field. Click Continue when finished.

Step 2. On the following page, edit the filter rules that control the values that appear in the dependent field for each value in the controlling field.

After that you will see new screen show on blow screen .

There is show on screen **Location** and **sub Location** if want select any field double click on cell for selecting, same as unselecting double click on cell. and click To **Save** button.

Edit Field Dependency

[Help for this Page](#) ?

Controlling Field: Location
Dependent Field: Sub Location

Instructions

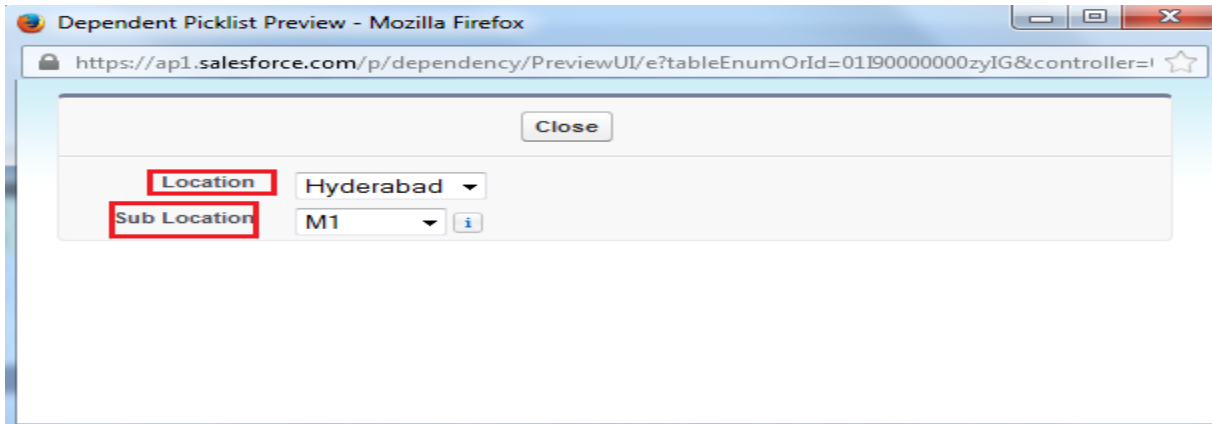
- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

Click button to include or exclude selected values from the dependent picklist

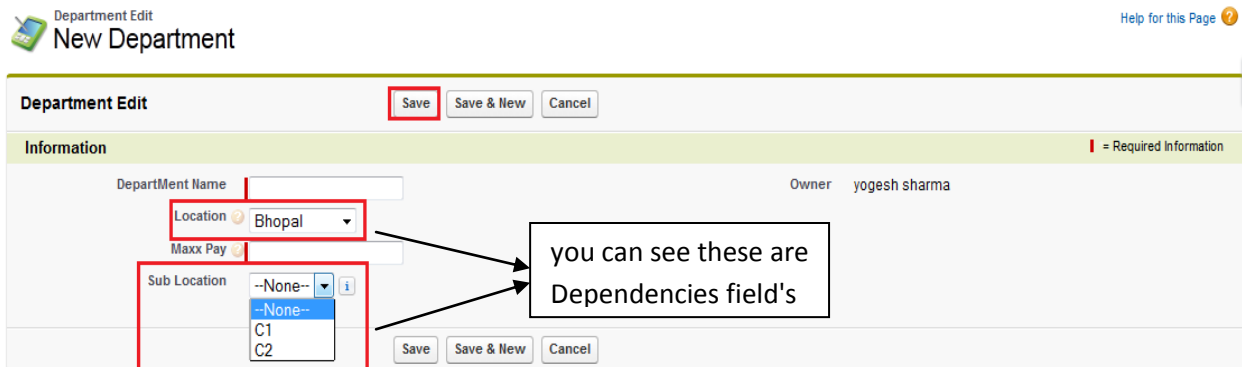
Location:	Bhopal	Delhi	Gwalior	Hyderabad	Jablpur
Sub Location:	C1	C1	C1	C1	C1
	C2	C2	C2	C2	C2
	M1	M1	M1	M1	M1
	M2	M2	M2	M2	M2
	P1	P1	P1	P1	P1
	P2	P2	P2	P2	P2

Click button to include or exclude selected values from the dependent picklist

if want see Preview Click to **Preview** button open popup window show preview blow screen.



After set the Field Dependencies you can check now go to Objects Create and click to any custom field and click to **New** button. Show on blow screen.



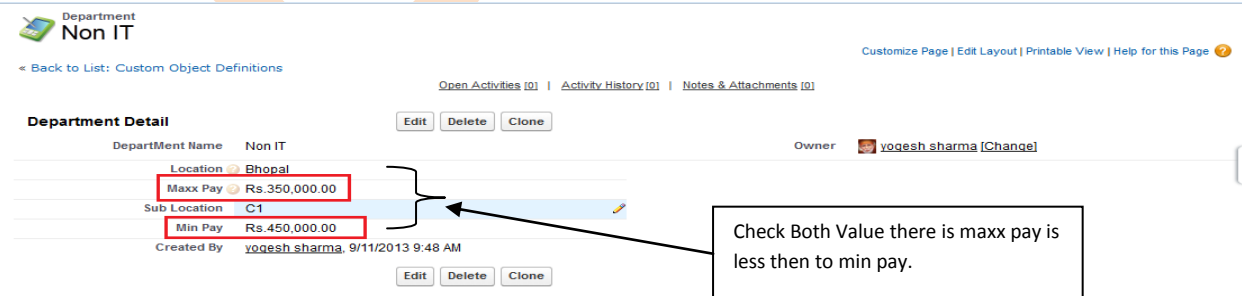
What is validation in SalesForce

Validation verify that the data client side or server side, user enters in a record and user not allow to wrong entry in the database. it will inform to you front end give error message.

Why Need Validation

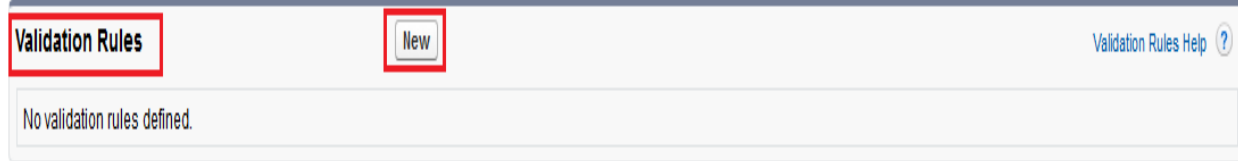
User can not be entered wrong entry on given field's.

For Ex :- When using Custom Fields & Relationships and by mistake save data Maxx pay 350000 and Min Pay 450000. This is wrong value save in data base. in database wrong value not save and check all value on First time save database use validation. Show in blow screen.



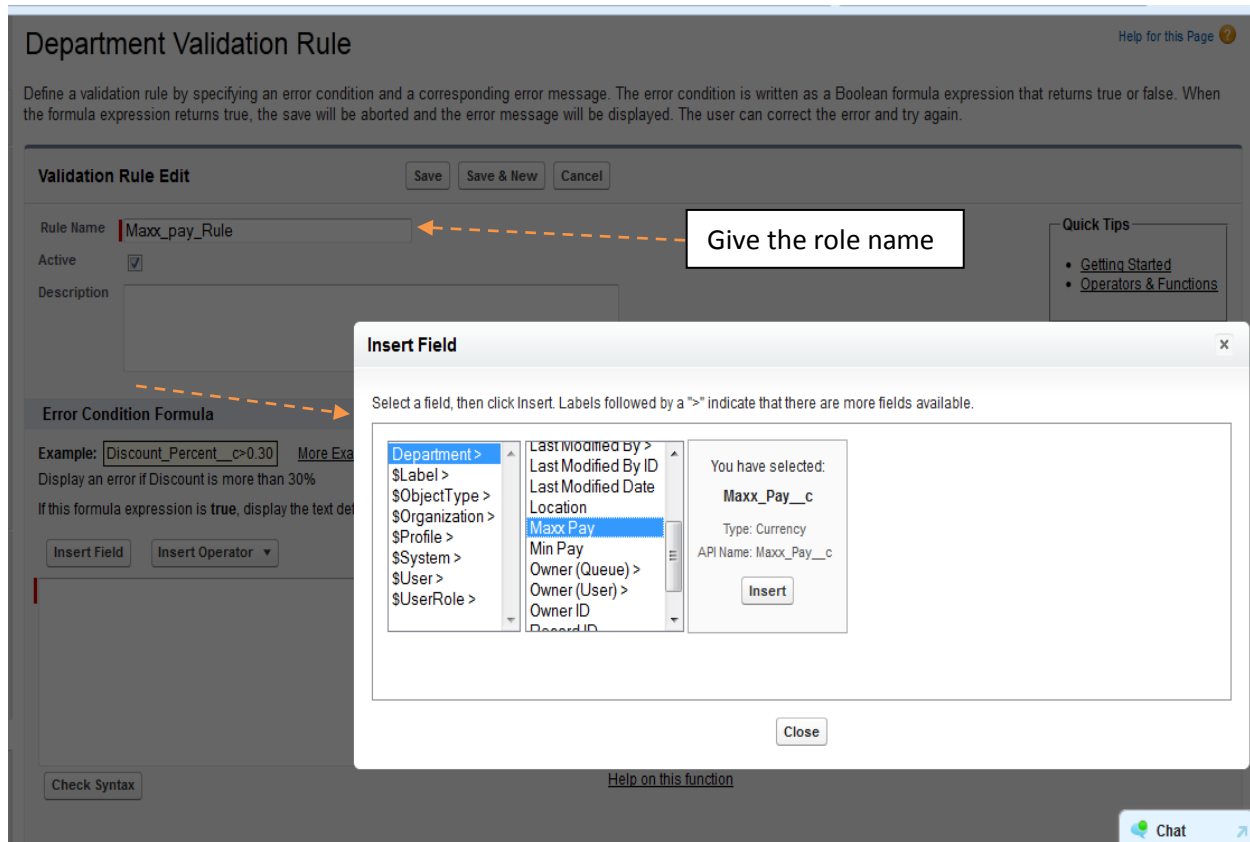
How to use Validation in Salesforce

Go to **Setup** -> **objects** -> select any **Custom objects** -> find the **Validation Rules** show in blow screen.



Click to **New** Button after that show new screen you can see blow

Step 1# :-



Give the **Role Name** after that come to Error Condition Formula Click to **Insert Field** button Show pop window you can see Select the custom object and choose value which want to perform operation and click to **insert** button.

Then Click to **Insert Operator** button for inserting operator (choose '**< Less Than**' Operator) and again click to **Insert Field** button to add Min pay after that click on **Check Syntax** button for checking Syntax. you can see blow screen.

Department Validation Rule

[Help for this Page](#)

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit Save Save & New Cancel

Rule Name:

Active:

Description:

Quick Tips

- Getting Started
- Operators & Functions

Error Condition Formula ! = Required Information

Example: [More Examples ...](#)

Display an error if Discount is more than 30%

If this formula expression is true, display the text defined in the Error Message area

No errors found

Functions

-- All Function Categories --

- ABS
- AND
- BEGINS
- BLANKVALUE
- BR
- CASE

ABS(number)
Returns the absolute value of a number, a number without its sign

[Help on this function](#)

and you can all show add error message when you enter wrong value. you can see blow

Error Message

Example:

This message will appear when Error Condition formula is true

Error Message:

This error message can either appear at the top of the page or below a specific field on the page

Error Location: Top of Page Field

Save Save & New Cancel

Annotations:

- Give The proper Error message
- Select your Error location where to show the error message check the radio button.

Click to **Save** button Save validation.

After that you can check this validation Click to custom object tab (Ex :- Departments) click to **New** button and Give the wrong value in (Ex :- maxx_pay < min_pay [Maxx pay 350000 or Min pay 450000])

you can see in blow screen.

Department Edit Save Save & New Cancel

Error: Invalid Data.
Review all error messages below to correct your data.

Information = Required Information

Department Name Owner yogesh sharma

Location

Maxx Pay Error: Max Pay Should Less Then Min Pay

Sub Location i

Min Pay

Save Save & New Cancel

When you provide value is correct min value < less then max value this data save successfully.

How to use Function in validation

Let's be use AND function. Click find the **Functions** in **Validation Rule** and select the AND function. there is few step show on blow screen –

Step 1# :- You can show in page **Function**. Add to function tow way

- i) Double click on selected function.
- ii) Select the function and click to **Insert Selected Functions** button.

After add function you can see blow image.

Validation Rule Edit Save Save & New Cancel

Rule Name **Quick Tips**
• Getting Started
• Operators & Functions

Active

Description

Error Condition Formula = Required Information

Example: [More Examples ...](#)
Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

Functions

-- All Function Categories --

ABS
AND
BEGINS
BLANKVALUE
BR
CASE

AND(logical1,logical2,...)
Checks whether all arguments are true and returns TRUE if all arguments are true

[Help on this function](#)

Error: Incorrect number of parameters for function 'SPICKVAL()'. Expected 2, received 3

Step 2# :- AND (logic1, logic2, . . .) . Clear the this area (logic1, logic2, . .) after that

Step 3# :- AND() go to function select **ISPICKVAL** Double click on **ISPICKVAL** .

Step 4# :- after that look like

- AND(ISPICKVAL(picklist_field, text_literal))

Remove picklist_field and insert field Status__c

- AND(ISPICKVAL(Status__c, text_literal))

Remove the text_literal write here 'Closed' [This is value of pick list].

- AND(ISPICKVAL(Status__c , 'Closed'))

Step 5# :- Select other function

- AND(ISPICKVAL(Status__c , 'close'), ISBLANK (expression))

Step 6# :- remove the **expression** and **Insert Field**

- AND(ISPICKVAL(Status__c , 'close'), ISBLANK(Close_date__c))

Step 7# :- Write the Error Message and select the Error Location click to **Save** button.
you can see in blow screen.

Department Validation Rule

[Help for this Page](#)

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit Save Save & New Cancel

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Error Condition Formula ! = Required Information

Example: [More Examples...](#)

Display an error if Discount is more than 30%

If this formula expression is true, display the text defined in the Error Message area

Functions

-- All Function Categories --

- ABS
- AND
- BEGINS
- BLANKVALUE
- BR
- CASE

ABS(number)

Returns the absolute value of a number, a number without its sign

[Help on this function](#)

Error Message

Example:

This message will appear when Error Condition formula is true

Error Message:

This error message can either appear at the top of the page or below a specific field on the page

Error Location: Top of Page Field

Save Save & New Cancel

After Save you can see the what error is occurred when without giving close date status is closed and try to save data.

Department
Non IT

Customize Page | Edit Layout | Printable View | Help for this Page

Back to List: Custom Object Definitions

Open Activities [0] | Activity History [0] | Notes & Attachments [0]

Department Detail

Save Cancel

Error: Invalid Data.
Review all error messages below to correct your data.

Owner: yoqesh sharma [Change]

Department Name: Non IT

Location: Bhopal

Maxx Pay: Rs. 350,000.00

Sub Location: C1

Min Pay: Rs. 150,000.00

Open date: Error: You must enter a value

Close date: Error: You must enter a value

Status: Closed

Created By: yoqesh sharma, 9/11/2013 9:48 AM

Last Modified By: yoqesh sharma, 9/11/2013 11:43 AM

Save Cancel

You can see the error on close date and open date status is closed

Default Value

when you add new field like a (ex :- add new department) there is one field is open date you don't want to add date, this field add automatically and this field add default date. you can see the blow screen

Department Edit

Save Save & New Cancel

Information

Department Name: | |

Owner: yoqesh sharma

Location: --None--

Maxx Pay: | |

Sub Location: --None--

Min Pay: | |

Open date: [9/12/2013]

Close date: [9/12/2013]

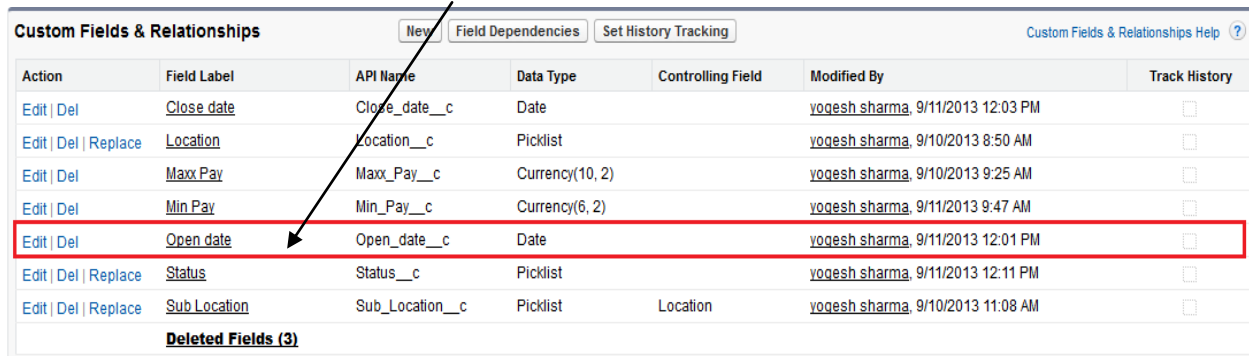
Status: --None--

Save Save & New Cancel

This Date Field want to get Default value.

How to set Default Value

Click to **setup** -> **Build** -> **create** -> **object** -> select your **custom object**(Ex :- Departments) -> Select you **Custom Field & Relationship** (Ex :- Open Date) you can see blow screen.



Action	Field Label	API Name	Data Type	Controlling Field	Modified By	Track History
Edit Del	Close date	Close_date__c	Date		voqesh sharma, 9/11/2013 12:03 PM	<input type="checkbox"/>
Edit Del Replace	Location	Location__c	Picklist		voqesh sharma, 9/10/2013 8:50 AM	<input type="checkbox"/>
Edit Del	Max Pay	Maxx_Pay__c	Currency(10, 2)		voqesh sharma, 9/10/2013 9:25 AM	<input type="checkbox"/>
Edit Del	Min Pay	Min_Pay__c	Currency(6, 2)		voqesh sharma, 9/11/2013 9:47 AM	<input type="checkbox"/>
Edit Del	Open date	Open_date__c	Date		voqesh sharma, 9/11/2013 12:01 PM	<input type="checkbox"/>
Edit Del Replace	Status	Status__c	Picklist		voqesh sharma, 9/11/2013 12:11 PM	<input type="checkbox"/>
Edit Del Replace	Sub Location	Sub_Location__c	Picklist	Location	voqesh sharma, 9/10/2013 11:08 AM	<input type="checkbox"/>

Deleted Fields (3)

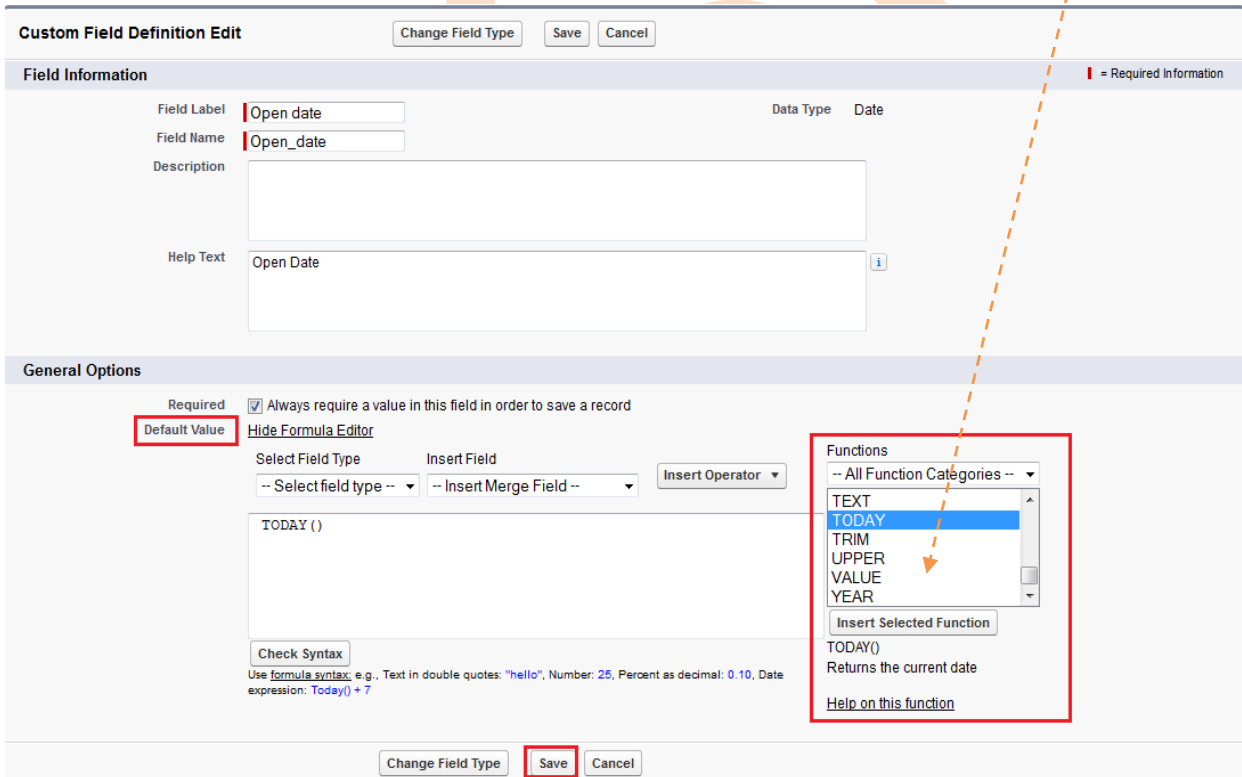
After that click on **Edit** button.

Then find default value and click on [Show Formula Editor](#) **Hyper link**.

And there is you can see Bottom -Right side on screen **Function** in function you find the **TODAY()**.

TODAY() :- TODAY() function return type current date.

Select this function and click to **Insert Selection Function** button. all these work you can see blow screen. After that Click to **Save** button.



Custom Field Definition Edit Change Field Type Save Cancel

Field Information = Required Information

Field Label: Data Type: Date

Field Name:

Description:

Help Text: ?

General Options

Required: Always require a value in this field in order to save a record

Default Value [Hide Formula Editor](#)

Select Field Type: Insert Field: Insert Operator

TODAY ()

Check Syntax

Use [formula syntax](#): e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7

Functions

-- All Function Categories --

- TEXT
- TODAY**
- TRIM
- UPPER
- VALUE
- YEAR

Insert Selected Function

TODAY()
Returns the current date

[Help on this function](#)

Change Field Type **Save** Cancel

After That you can go Custom objects(Ex :- Departments) and Click to **New** button there is you can see in **open date** field already fill by current date.

And you can all so change this date click on Text box or Click on date label.

Department Edit Save Save & New Cancel

Information Required Information

Department Name Owner yogesh sharma

Location

Maxx Pay

Sub Location

Min Pay

Open date ← See the **open date** field is fill current date.

Close date

Status

Save Save & New Cancel

Formula Field's

Formula is a validation rules, it can manage field's data.

How to Set Formula field :- click to Setup -> Go to objects -> Select you Custom object (Ex :- Departments) -> and find **Custom Fields & Relationships** click to **New** button

Step 1 :- there is find **Formula** Radio Button. Checked this Radio Button click to **Next** button. you can see blow screen.

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.

Step 2 :-

There is 7 **Formula Return Type :-**

- 1.) Checkbox
- 2.) Currency
- 3.) Date
- 4.) Date/Time
- 5.) Number
- 6.) Percent
- 7.) Text

Fill the **Field Label** and checked(Any Radio button), I will go **Date** radio button after then click to **Next** button.

Department
New Custom Field

Help for this Page

Step 2. Choose output type Step 2 of 5

Previous **Next** Cancel

Field Label Field Name

Formula Return Type

None Selected Select one of the data types below.

Checkbox Calculate a boolean value
Example: `TODAY() > CloseDate`

Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost_c`

Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date = CloseDate - 7`

Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `Next = NOW() + 1`

Number Calculate a numeric value.
Example: `Fahrenheit = 1.8 * Celsius_c + 32`

Percent Calculate a percent and automatically add the percent sign to the number.
Example: `Discount = (Amount - Discounted_Amount_c) / Amount`

Text Create a text string, for example, by concatenating other text fields.
Example: `Full Name = LastName & ", " & FirstName`

Step 3 :- After Gating Formula Field there show to Tab **Simple Formula** and **Advance Formula** select Advance Formula because there is more option available. Click to **Next** button.

Department
New Custom Field

Help for this Page

Step 3. Enter formula Step 3 of 5

Previous **Next** Cancel

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: `Reminder Date = CloseDate - 7` [More Examples...](#)

Simple Formula **Advanced Formula**

Last Day (Date) =
`DATE (YEAR (TODAY ()) , MONTH (TODAY ()) , DAY (DATE (YEAR (TODAY ()) , MONTH (TODAY ()) + 1 , 1) - 1))`

No syntax errors in merge fields or functions. (Compiled size: 323 characters)

Quick Tips

- Getting Started
- Operators & Functions

Functions

-- All Function Categories --

- ABS
- AND
- BEGINS
- BLANKVALUE
- BR
- CASE

Description

Help Text

Blank Field Handling

If your formula references any number, currency, or percent fields, specify what happens to the formula output when their values are blank.

Treat blank fields as zeroes

Treat blank fields as blanks

Previous **Next** Cancel

Step 4 :-

After that show new screen blow Click to Next button Go to next step.

Step 4. Establish field-level security Step 4 of 5

Previous **Next** Cancel

Field Label Last Day
 Data Type Formula
 Field Name Last_Day
 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	<input type="checkbox"/> Visible	Read-Only
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Partner App Subscription	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Silver Partner User	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Standard Platform User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Previous Next Cancel

Step 5 :- Click to **Save** button save this formula.

Department
 New Custom Field

[Help for this Page](#) ?

Step 5. Add to page layouts Step 5 of 5

Previous Save & New **Save** Cancel

Field Label Last Day
 Data Type Formula
 Field Name Last_Day
 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.

<input checked="" type="checkbox"/> Add Field	Page Layout Name
<input checked="" type="checkbox"/>	Department Layout

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

Previous Save & New Save Cancel

After that you will check this formula how is it work click to custom objects (Ex :- Departments) --> select any custom objects(Ex :- Non IT) you can see blow how is show last date function.

[« Back to List: Custom Object Definitions](#)

[Open Activities \(0\)](#) | [Activity History \(0\)](#) | [Notes & Attachments \(0\)](#)

Department Detail

[Edit](#) [Delete](#) [Clone](#)

Department Name	Non IT	Owner	 yqesh sharma [Change]
Location	 Bhopal		
Maxx Pay	 Rs.350,000.00		
Sub Location	C1		
Min Pay	Rs.150,000.00		
Open date	 9/4/2013		
Close date	 9/16/2013		
Status	Closed		
Last Date	9/30/2013		
Created By	yqesh sharma , 9/11/2013 9:48 AM	Last Modified By	yqesh sharma , 9/11/2013 2:31 PM

[Edit](#) [Delete](#) [Clone](#)

There is show last date of Month

