Getting Started with SalesForce CRM

Getting Started with SALESFORCE Part III
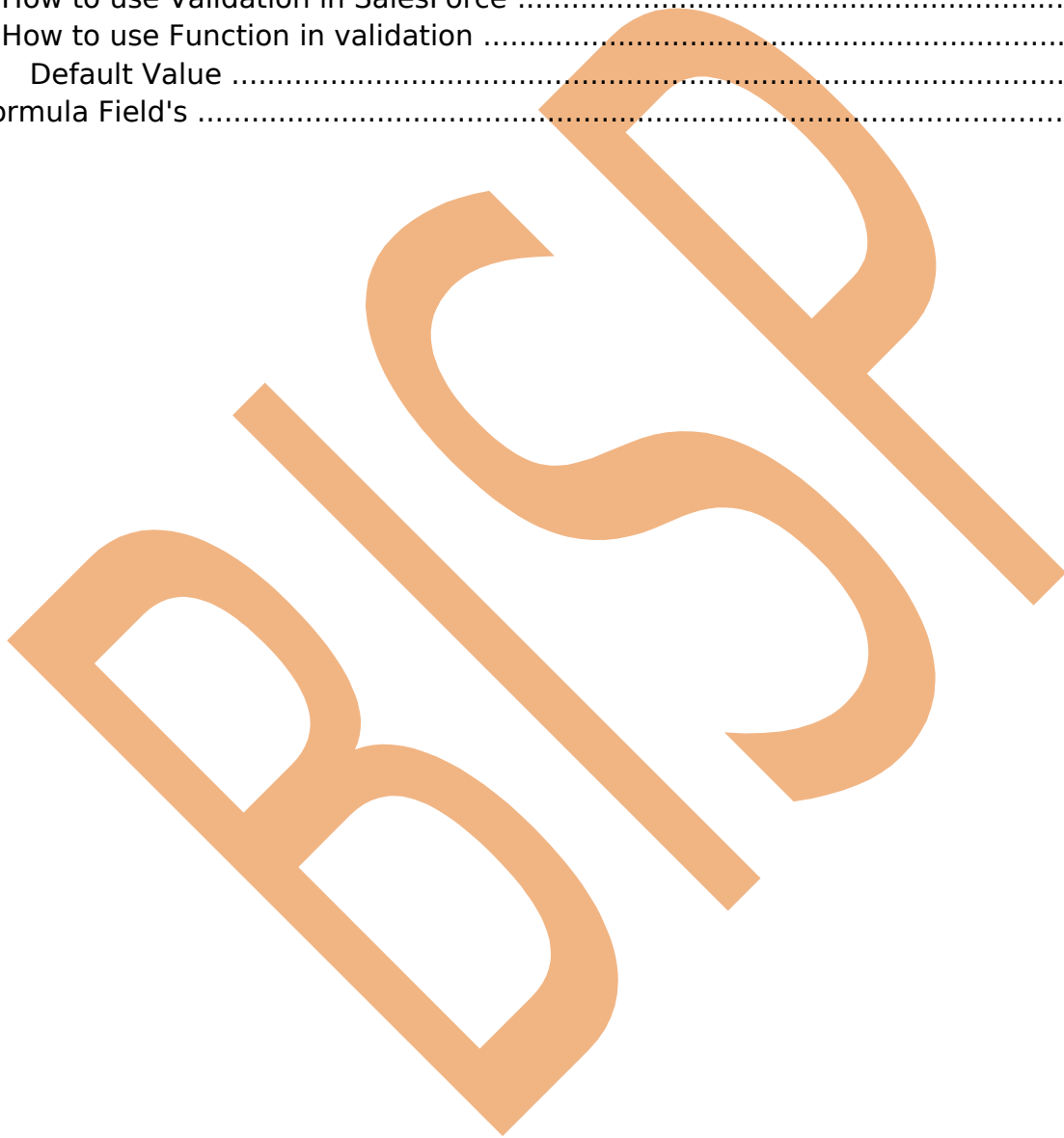
Description:

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 various aspects of validation. Join our professional training program and learn from experts.

History:

Version	Description Change	Author	Publish Date
0.1	Initial Draft	Chandra Prakash Sharma	20th July 2012
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Contents

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.

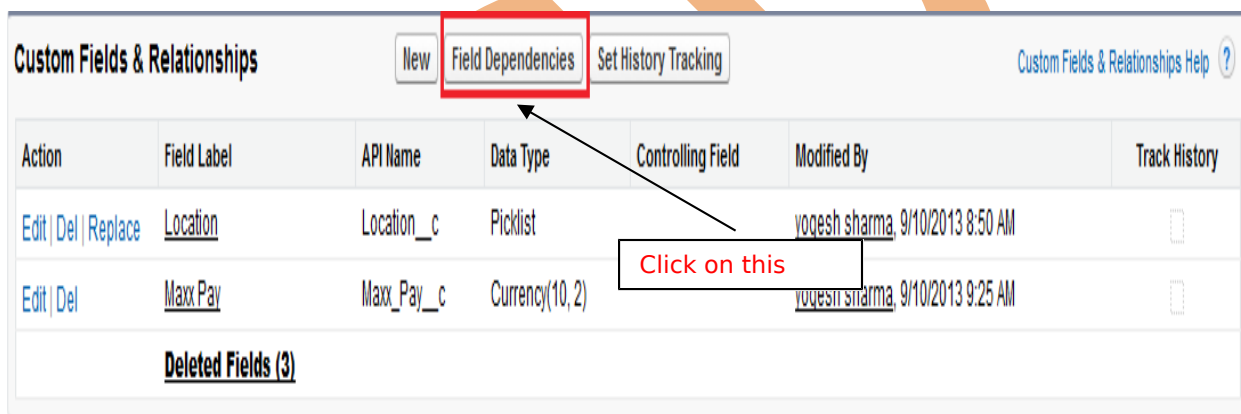There is two type picklist field dependencies in SalesForce.com

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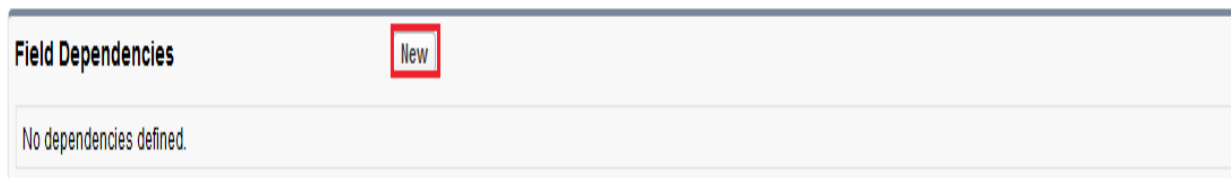
Click on **Field Dependencies** button and new show on below screen. Then click to **New** button.

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

After that you will see new screen show on below 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.

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

you can see these are

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 below screen.

Check Both Value there is maxx pay is less then to min pay.

How to use Validation in SalesForce

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

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

---

Step 1# :-

Department Validation Rule

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.

Help for this Page

Validation Rule Edit   Save   Save & New   Cancel

Rule Name   Maxx_pay_Rule   Give the role

Active   ☑

Description

Quick Tips
- Getting Started
- Operators & Functions

Insert Field   ✕

Select a field, then click Insert. Labels followed by a ">" indicate that there are more fields available.

Department >	Last Modified By >	You have selected:
$Label >	Last Modified By ID	
$ObjectType >	Last Modified Date	**Maxx_Pay__c**
$Organization >	Location	
$Profile >	Maxx Pay	Type: Currency
$System >	Min Pay	API Name: Maxx_Pay__c
$User >	Owner (Queue) >	
$UserRole >	Owner (User) >	Insert
	Owner ID	
	Record ID	

Error Condition Formula

Example: Discount_Percent__c>0.30   More Exa

Display an error if Discount is more than 30%

If this formula expression is **true**, display the text de

Insert Field   Insert Operator ▼

Check Syntax   Help on this function

Close

💬 Chat

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 Then' 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 below screen.

Department Validation Rule

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   Maxx_pay_Rule
Active   ☑
Description

Quick Tips
• Getting Started
• Operators & Functions

Error Condition Formula   ▌ = Required Information

Example: Discount_Percent__c>0.30   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

Insert Field   Insert Operator ▼

Maxx_Pay__c < Min_Pay__c

Functions
-- All Function Categories -- ▼
ABS
AND
BEGINS
BLANKVALUE
BR
CASE

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

Help on this function

Check Syntax   No errors found

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

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is **true**

Error Message   Max Pay Should Less Then Min Pay

Give The proper Error

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 Maxx Pay   ▼   i

Select your Error location where to show the error message check

Save   Save & New   Cancel

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 below screen.

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

How to use Function in validation

Let's be use <u>AND</u> function. Click find the **Functions** in **Validation Rule** and select the <u>AND</u> function.

there is few step show on below 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 below image.

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 below screen

Al_____ status is closed and try to save data.

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 filed add automatically and this filed add default date. you can see the below screen

This Date Field want to get Default

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 below screen.

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	Close date	Close_date__c	Date		yogesh sharma, 9/11/2013 12:03 PM		☐
Edit | Del | Replace	Location	Location__c	Picklist		yogesh sharma, 9/10/2013 8:50 AM		☐
Edit | Del	Maxx Pay	Maxx_Pay__c	Currency(10, 2)		yogesh sharma, 9/10/2013 9:25 AM		☐
Edit | Del	Min Pay	Min_Pay__c	Currency(6, 2)		yogesh sharma, 9/11/2013 9:47 AM		☐
Edit | Del	Open date	Open_date__c	Date		yogesh sharma, 9/11/2013 12:01 PM		☐
Edit | Del | Replace	Status	Status__c	Picklist		yogesh sharma, 9/11/2013 12:11 PM		☐
Edit | Del | Replace	Sub Location	Sub_Location__c	Picklist	Location	yogesh sharma, 9/10/2013 11:08 AM		☐
	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 below screen. After that Click to **Save** button.

   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.

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

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 below screen.

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.

Step 2. Choose output type   Step 2 of 5

Give Label Name

Previous | **Next** | Cancel

Field Label `Last Day`   Field Name `Last_Day` ℹ

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.

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**

Insert Field   Insert Operator ▾

Quick Tips
- Getting Started
- Operators & Functions

Last Day (Date) =

`DATE(YEAR(TODAY())  ,MONTH(TODAY()),DAY(DATE(YEAR(TODAY()),MONTH(TODAY())+1,1)-1))`

Functions
-- All Function Categories -- ▾

ABS
AND
BEGINS
BLANKVALUE
BR
CASE

Insert Selected Function

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

Write This formula for

Description

Help Text ℹ

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 below Click to Next button Go to next step.

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	☐ 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	☑	✓
Standard Platform User	☑	✓
Standard User	☑	✓
System Administrator	☑	✓

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.

☑ Add Field	Page Layout Name
☑	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 below how is
show last date function.

Department
Non IT

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

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

Department Detail   [Edit] [Delete] [Clone]

DepartMent Name	Non IT	Owner yogesh 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	yogesh sharma, 9/11/2013 9:48 AM	Last Modified By yogesh sharma, 9/11/2013 2:31 PM

There is show last date of Month

[Edit] [Delete] [Clone]