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Getting Started with SalesForce CRM

Getting Started with SALESFORCE Part V
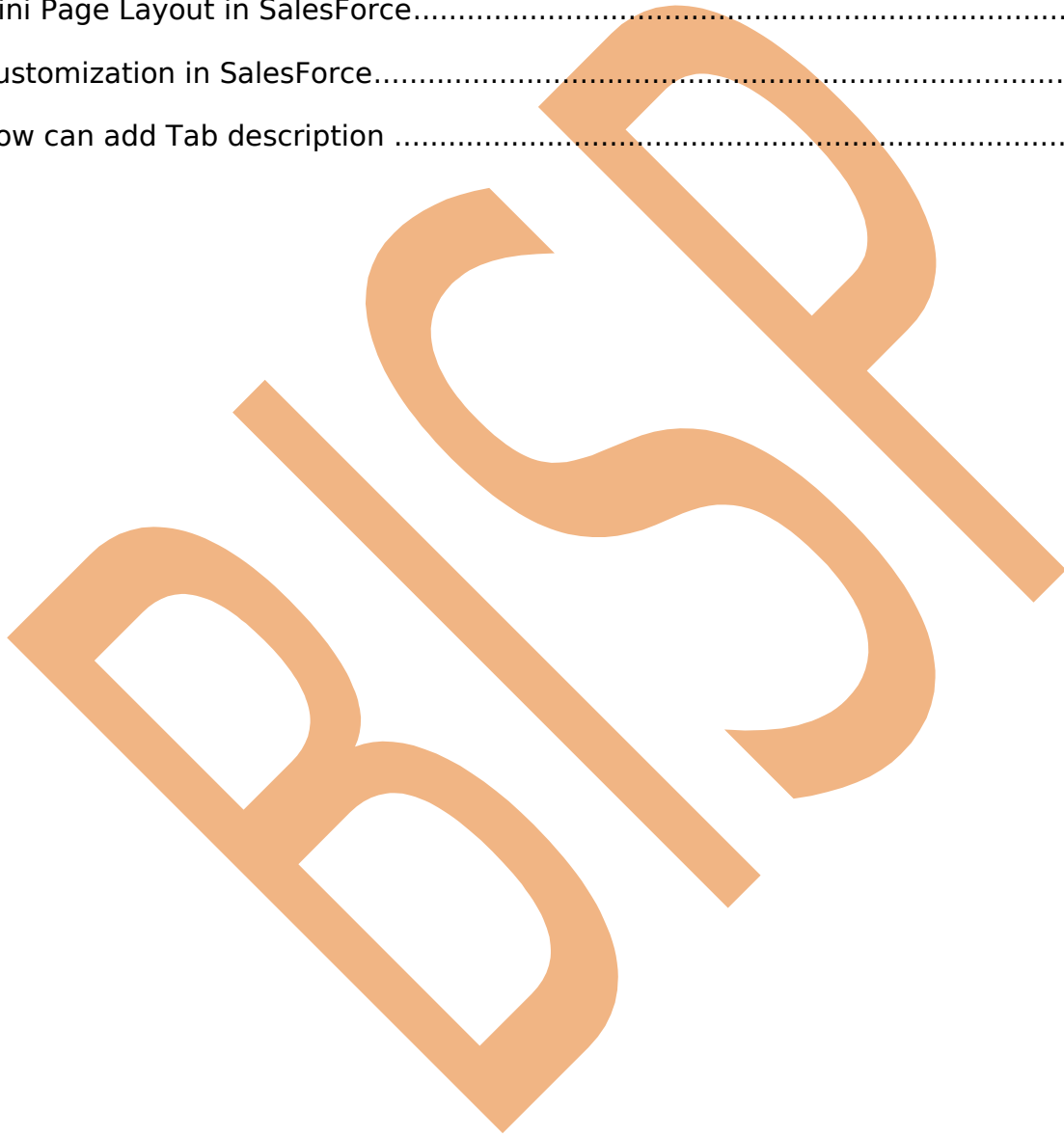
Description:

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 relationship, formula field and customization. Join our professional training program and learn from experts.

Contents

Relationship in SalesForce

Use relationship to associate one object to another object in salesFroce.com. The relationship just called parent our child relation, create relation parent our child relation.
The object which on you create a relation is called the child, you can only create a relation field on the child object.

In SalesForce you have two option
1.) Lookup Relationship
2.) Master Detail Relationship

1.) Lookup Relationship :- Lookup field is non mandatory field by default, deleting the parent record will not affect the child records, in lookup Relationship we have create 25 child.

2.) Master Detail Relationship :- Master detail field is mandatory field by default, deleting the parent record will also delete all the associated records, master detail relationship we have create 2 parent.

Click to **setup** -> **create** -> click on field after that you find the **Custom Fields & Relationships** in **Custom Fields & Relationships** click on **new** button. and select the **Lookup Relationship** Radio button. check this ration button and click to **Next** button. you can see below.

Step 1 :-

Employee
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 [i]	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.

After Click **Next** button

Step 2 :-

There is one dropdown menu name is **Related List** in this dropdown select any value which want to you and click to N**ext** button. you can see below .

Select any value and click

Step 3 :-

Fill the Field Name and click to Next button.

Employee
New Relationship

Step 3. Enter the label and name for lookup field	Step 3 of 6

Previous | Next | Cancel

Field Label Candidate ℹ️

Field Name Candidate ℹ️

Description

Help Text ℹ️

Child Relationship Name Employees ℹ️

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

What to do if the lookup record is deleted? ⦿ Clear the value of this field. You can't choose this option if you make this field required.

○ Don't allow deletion of the lookup record that's part of a lookup relationship.

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 4 :-
Click to next Button and Go next screen.

Employee
New Relationship

Help for this Page ?
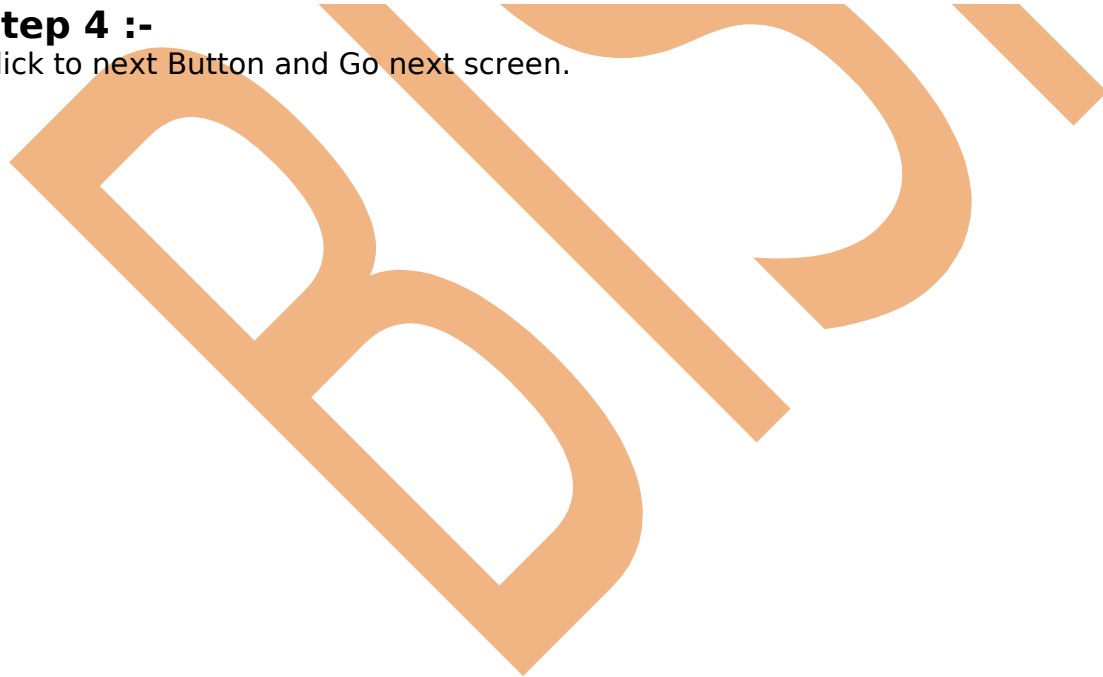
Step 4. Establish field-level security for reference field	Step 4 of 6

Previous | **Next** | Cancel

Field Label   Candidate
Data Type   Lookup
Field Name   Candidate
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	☑	☐

Step 5 :-

Employee
New Relationship

Help for this Page ?

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

Previous | Next | Cancel

Field Label   Candidate
Data Type   Lookup
Field Name   Candidate
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
☑	Employee Layout

Previous | **Next** | Cancel

Click to Next button.

Step 6 :-
Click to **Save** button.

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Page 6

Step 6. Add custom related lists   Step 6 of 6

Previous | Save & New | Save | Cancel

Field Label	Candidate
Data Type	Lookup
Field Name	Candidate
Description	

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

Related List Label   Employees

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
☑	Candidate Layout

☑ Append related list to users' existing personal customizations

Previous | Save & New | Save | Cancel

After that you can click on employee tab and check the change on employee tab.

Employee Edit
Emp-002

Help for this Page

Employee Edit   Save | Save & New | Cancel   = Required Information

Information

Employee Number	Emp-002
First Name	abbc
Mobile Number	1234567890
Email Id	a@a.com
Candidate	
Postion	

Save | Save & New

Lookup

Search [   ] Go!

You can use "*" as a wildcard next to other characters to improve your search results.

Search Results

Candidate Number	First Name	Mobile Number	Email Id
Y-001	chandra prakash	(658) 545-6875	bpl@bpl.com
Y-002	suresh	65	a@a.com

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After Save you can see that page .

Employee
Emp-002

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

« Back to List: Custom Object Definitions

Open Activities [0] | Activity History [0]

Employee Detail   Edit | Delete | Clone

Employee Number	Emp-002		Owner	yogesh sharma [Change]
First Name	abbc			
Mobile Number	1234567890			
Email Id	a@a.com			
Candidate	Y-001			
Postion	Java dev			
Created By	yogesh s		Last Modified By	yogesh sharma, 9/17/2013 1:55 PM

Candidate   View | Edit

First Name	chandra prakash
Email Id	bpl@bpl.com
Mobile Number	(658) 545-6875

Open Activities   Open Activities Help

No records to display

If you want see position is dependent or not for example delete the any position name after that you can see the changes.

And before deleting SF Developer you can see

Click on Positions Tab and click after that click any field name and delete this field
Ex :- Positions **->** SF Developer **->** Delete
you can see below screen.

After delete Position name you can see that filed is empty because these field depend on position field.

Depending

Formula Field in SalesForce

Formula Field called Cross object formula field. And they are work only in relationship. it can make use of various data and operations to perform the calculation

How To Add Formula Field :

Click to **Setup -> Objects** -> **select your custom object(Ex :- Employees)** and find **Custom Fields & Relationships** click on **New** Button. and check the field **Formula** you can see below.

Step 1:-
Select Formula and click **Next** button .

Employee
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 [i]   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.

Step 2 :-
  Give the **First Label** name and select **Formula Return Type** and click to **Next** button.

Step 3 :-

In this step click on **Insert Field** button after that open popup window you may be select your field click to **Insert** button .

After that you can see that Formula is add in text field. see below.
There you can see Formula will add on text field click to **Next** button .

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: | Full Name = LastName & ", " & FirstName | More Examples ...

Simple Formula | Advanced Formula

Insert Field   Insert Operator ▼

Quick Tips
- Getting Started
- Operators & Functions

Functions
-- All Function Categories -- ▼

Employee Name (Text) =

Candidate__r.First_Name__c

ABS
AND
BEGINS
BLANKVALUE
BR
CASE

Insert Selected Function

Step 4 :-

After that click to **Next** button .

Previous **Next** Cancel

Field Label   Employee Name
Data Type   Formula
Field Name   Employee_Name
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	☑	✓

Step 5 :-
if you want to add more formula field click to **Save & New** button else click on **Save** button.

Employee
New Custom Field

Step 5. Add to page layouts	Step 5 of 5

Previous | Save & New | **Save** | Cancel

Field Label — Employee Name
Data Type — Formula
Field Name — Employee_Name
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
☑	Employee 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 can check it Click to Custom objects(Ex :- Employee) and you can any employee list and see the changes.

Employee
Emp-005

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

« Back to List: Custom Object Definitions

Open Activities [0] | Activity History [0]

Employee Detail   Edit | Delete | Clone

Employee Number	Emp-005	Owner yogesh sharma [Change]
First Name	abbc	
Mobile Number	1234567890	
Email Id	a1@a.com	
Candidate	Y-002	
Postion	Sr. SW	
Employee Name	suresh 🔒	These are formula field and it will not editable
Min Pay Of This Position	Rs.35,000.00 🔒	
Created By	yogesh sharma, 9/18/2013 9:37 AM	Last Modified By yogesh sharma, 9/18/2013 10:10 AM

Edit | Delete | Clone

When you add new record you can find there is no formula field show .it will show only view time.

Mini Page Layout in SalesForce

You can define mini page layout for the records that appear in the mini view in SalesForce.
This allows users to access information across multiple object and multiple records types on one screen without the use of custom formulas, VisualForce pages, or any other code.
Mini Page Layout only show mandatory fields.

You can all so add new field on candidate list .
how can open mini page layout list in SalesForce :-
Click on the Custom object (Ex :- **Positions**) and after that click on any **position name**

After that click on **Edit Layout**

After That Click on **Mini Page Layout**
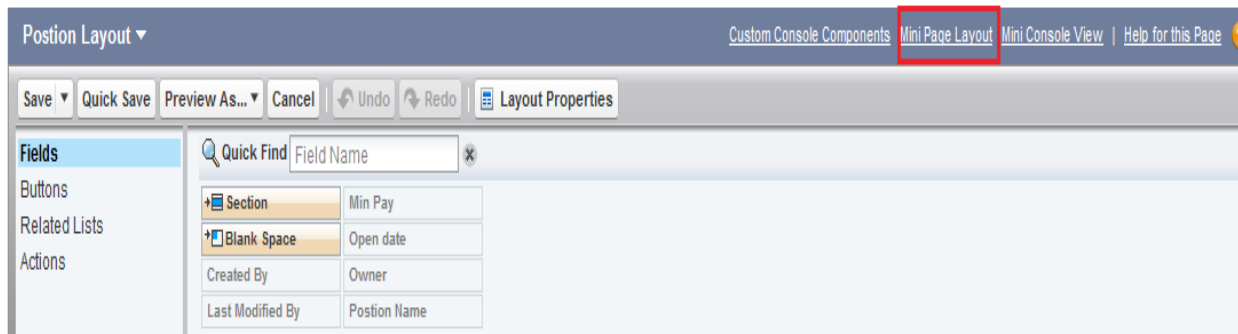
After that you can show below screen on this screen you can add the available item and click to **Save** button.
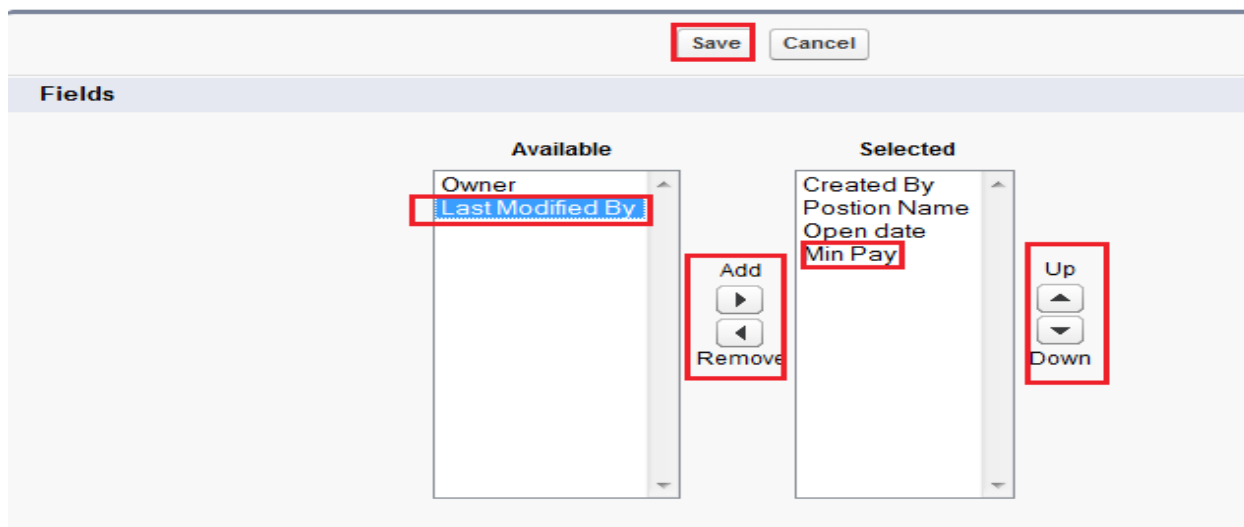
After **Save** you can check the employee list.

This is mini page

Customization in SalesForce

If you need to adapt SalesForce functionality to your company's existing processes and workflows so as to make them more efficient and effective, we will help you customize your SalesForce experience. We can customize and personalize your existing Salesforce.com CRM solution according to your business needs.

For Ex :- if you want to add new employee record there is many post and employee code available how to find the particular Job and employee code etc.
see below on screen.

you can seen upper screen there is many job available if you have many office in country and have you requirement of in pune, java developer in this list find to you on job bases very difficult so you can add some more information about position like a city name, sub location etc.

How to Create :
Click on **Setup** -> **Objects** -> **Select any object (Ex :- Employees)** - > there is find you
Search Layout in this section you can find **Lookup dialog.**

you can see below **.**

After that you can click on **Edit** button and add item you can show below screen.

After that click to save button and see below. You can seen that changes

When click on any custom objects Tab (Ex: - Employees) there is show list not fully describe you can show below screen.

There is no More Tab

How can add Tab description

Click to **setup** - > **objects** -> select on **custom objects** name(Ex :- Employees) click on this Tab and find the **Search Layouts** panel in this panel **Employee Tab** is show click to **Edit** button.

After that add available field click to **Add** button and save the data you can check it click on employee Tab. see below.

after save the data you can see it in employee record available with details.