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Getting Started with SalesForce CRM

Getting Started with SALESFORCE Part VI

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 master details relationship. Join our professional training program and learn from experts.

History:

Version	Description Change	Author	Publish Date
0.1	Initial Draft	Chandra Prakash Sharma	12th May 2012
0.1	Review#1	Amit Sharma	13th May 2012

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Master Detail Relationship

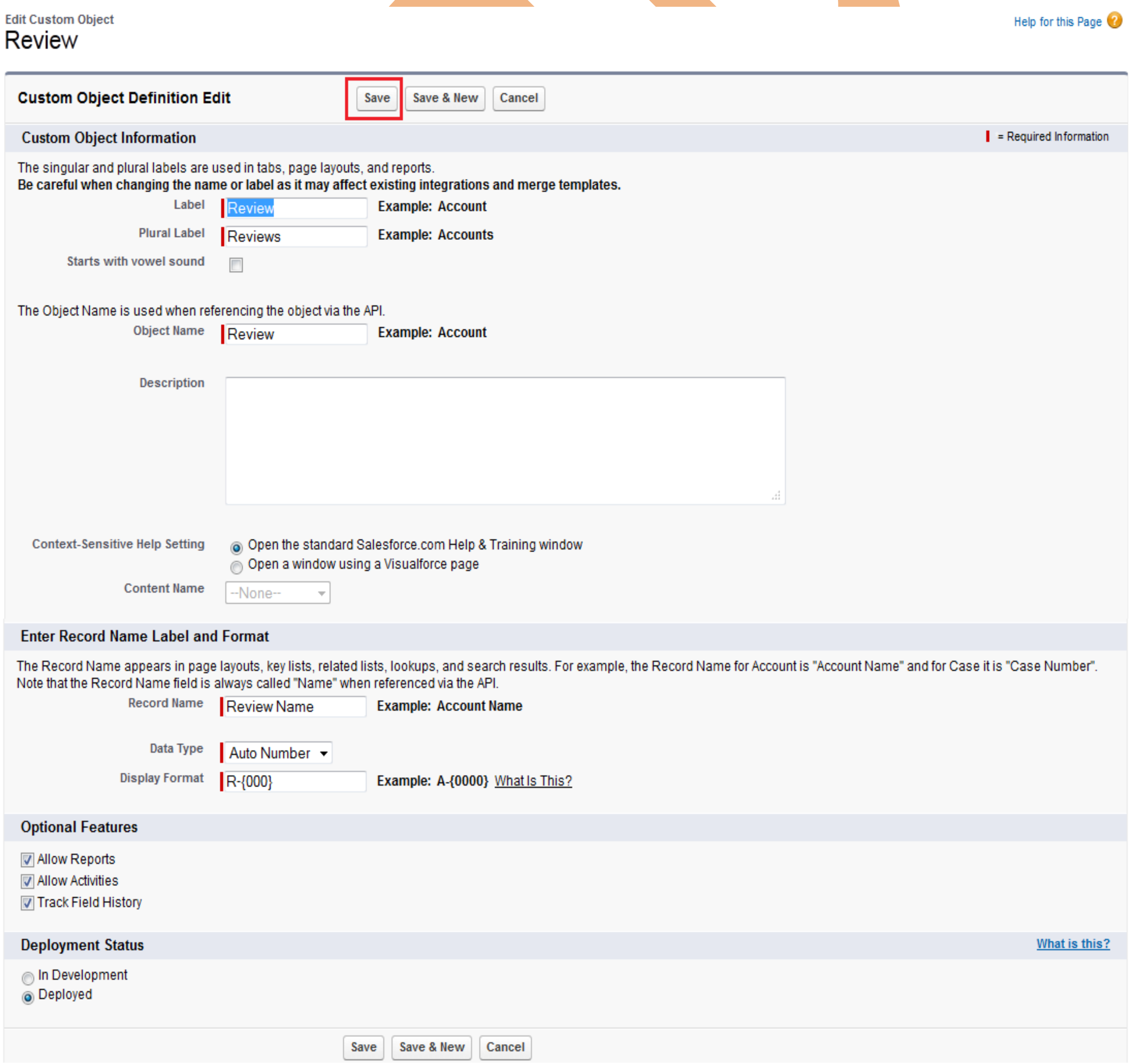
Master Detail Relationship create multilevel master detail relationships. Master Detail Relationship perform parent child relationship and all so define master detail relationship custom object and standard object.

- Child record must have a parent.
- Cascade record-level security.

show master detail relationship with compare two objects Ex-(Candidates and job application)
flowing some steps for create master detail relationship.

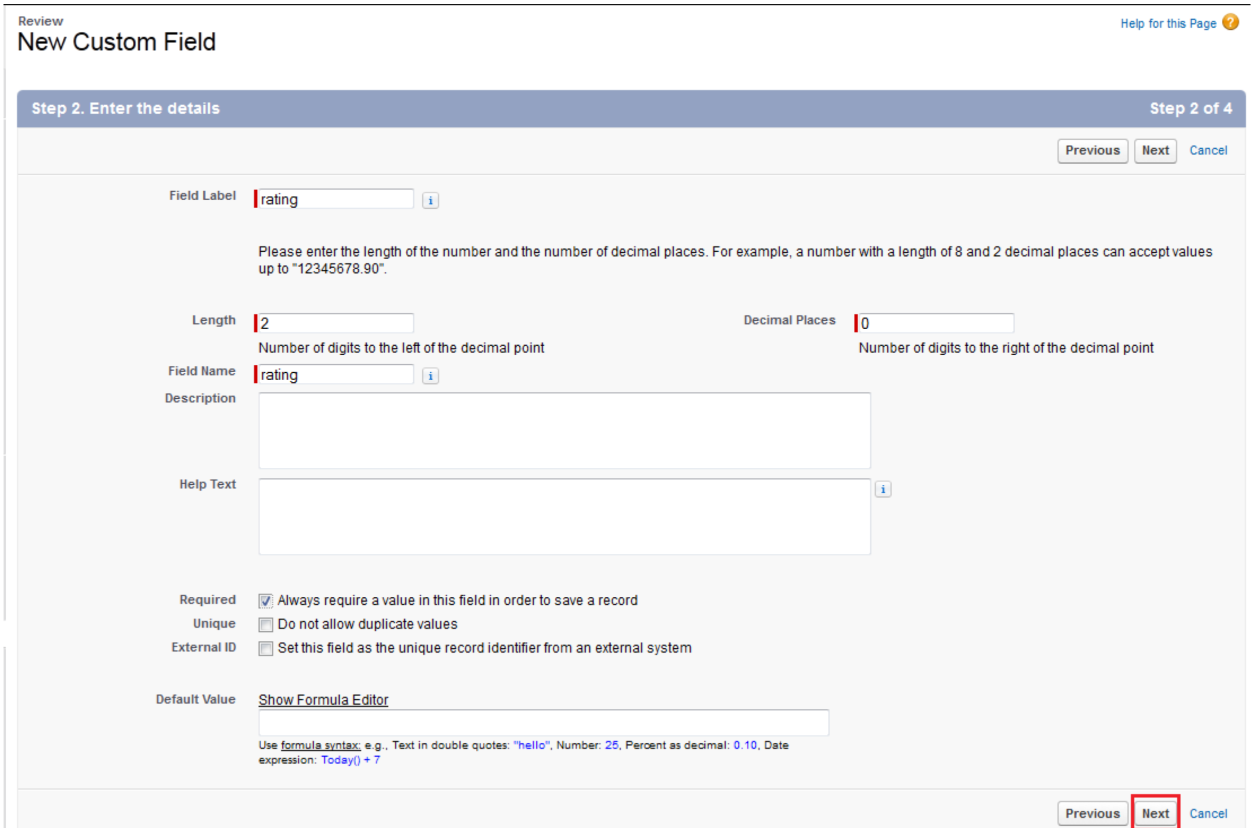
How to Create Master Detail Relationship :-
Click to **Setup** -> **Create** -> **Objects** -> Click to **New Custom Object**

Step 1 :- Create new Custom Objects Ex- (Review).



Step 2 :-

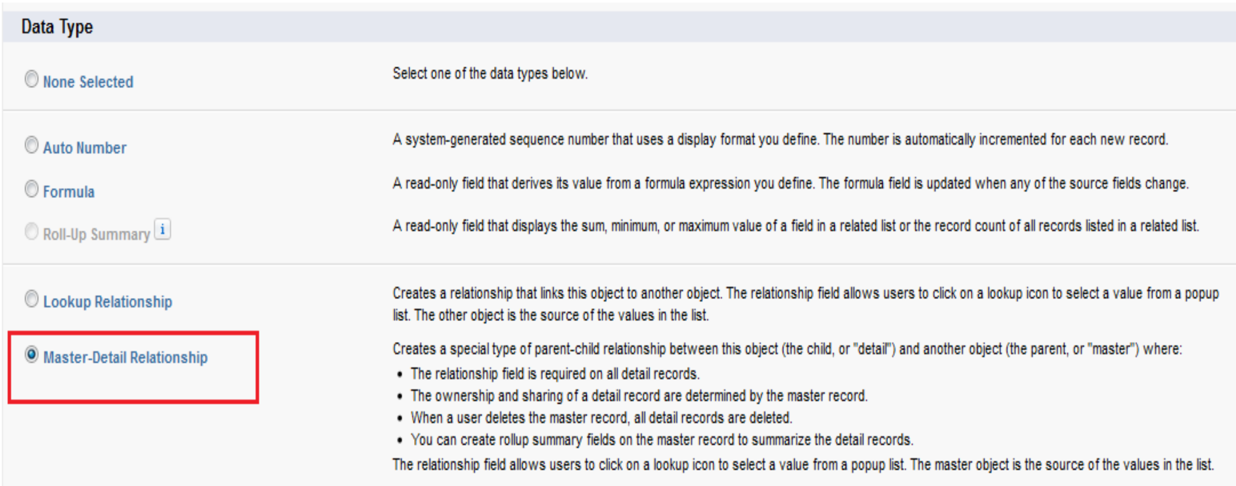
After creating add new **Custom Fields & Relationships**. select any data type Ex-(i am selecting number for review rating.



Finish all the step on this **Custom Fields & Relationships** and same add all so anther Text area field.

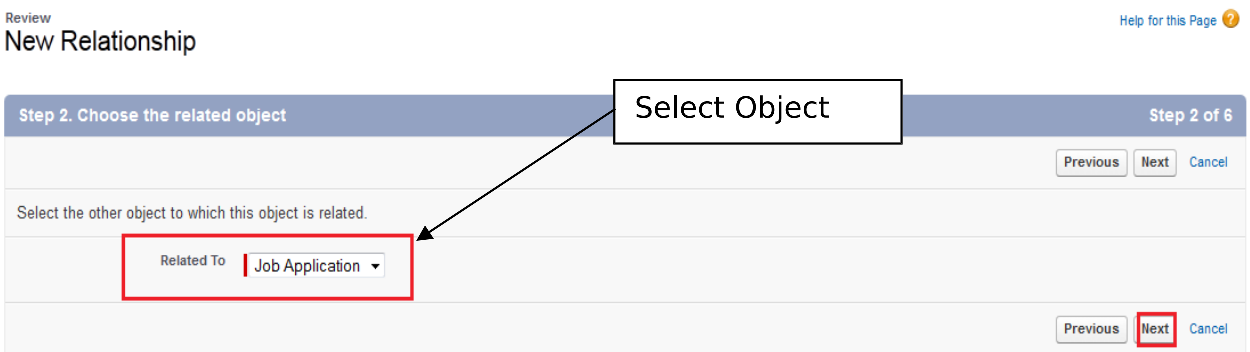
Step 3 :-

Click to Custom Fields & Relationships **New** button and select the **Master-Detail Relationship** show in below.



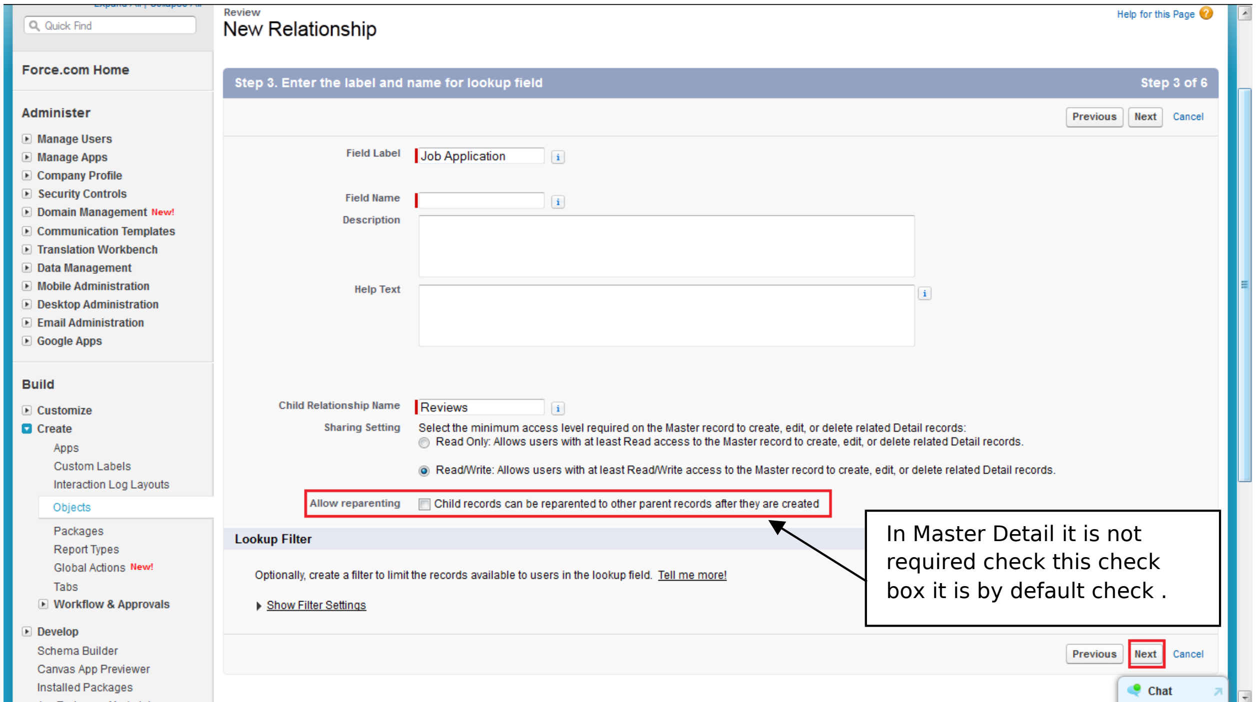
Step 3 :-

Select **Master-Detail Relationship** and click to **Next** button.
Select the other object to which this object is related. click to **Next** button.

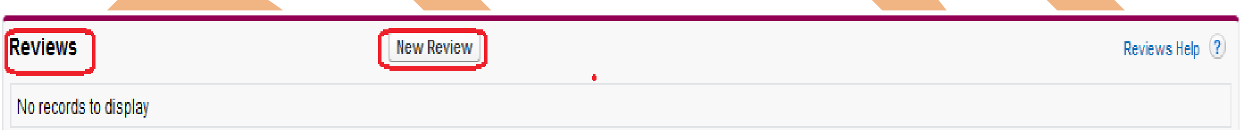


Step 4 :-

Check the option and click to **Next** button.



Click to **Next**.. **Next** button and Save this relationship.
After that you can see that click on job location and see below give the review. click to **New Review** button create review,



Validation by using Relational Operators in SalesForce.com

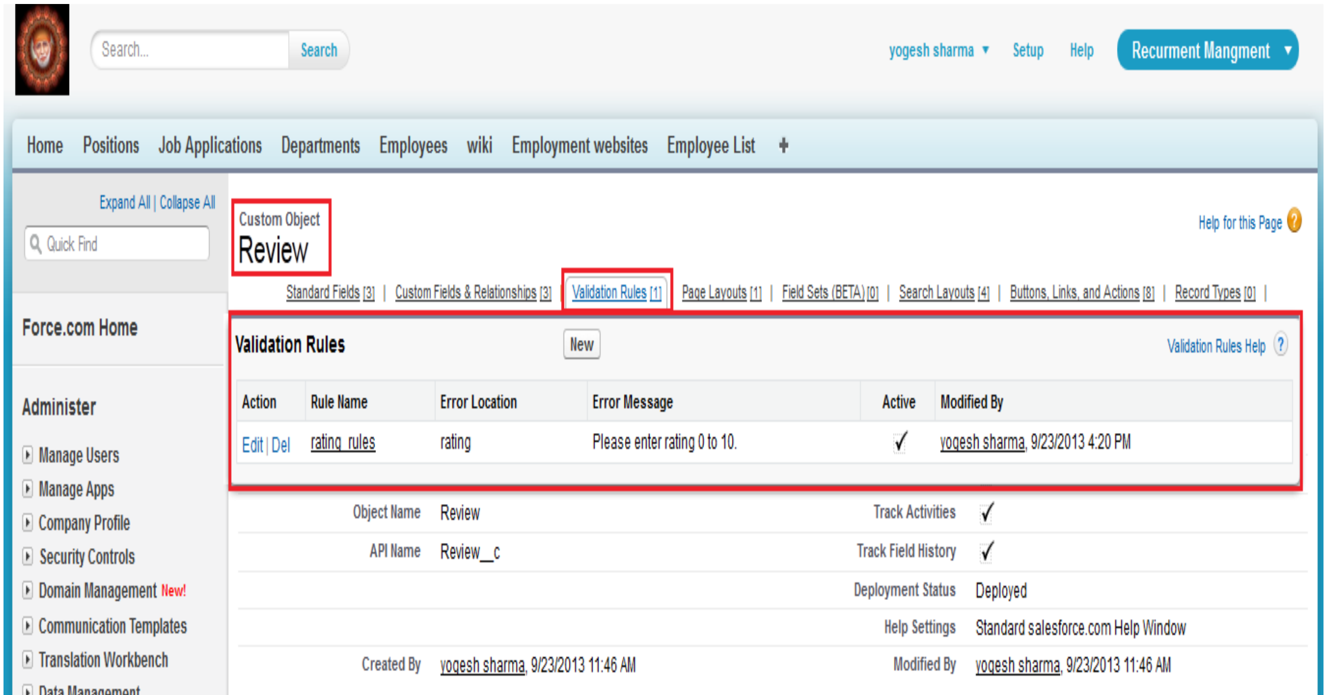
Ex: - How to validate in Review rating field user cannot give less than 1 and greeter then 10.

Step 1 :-

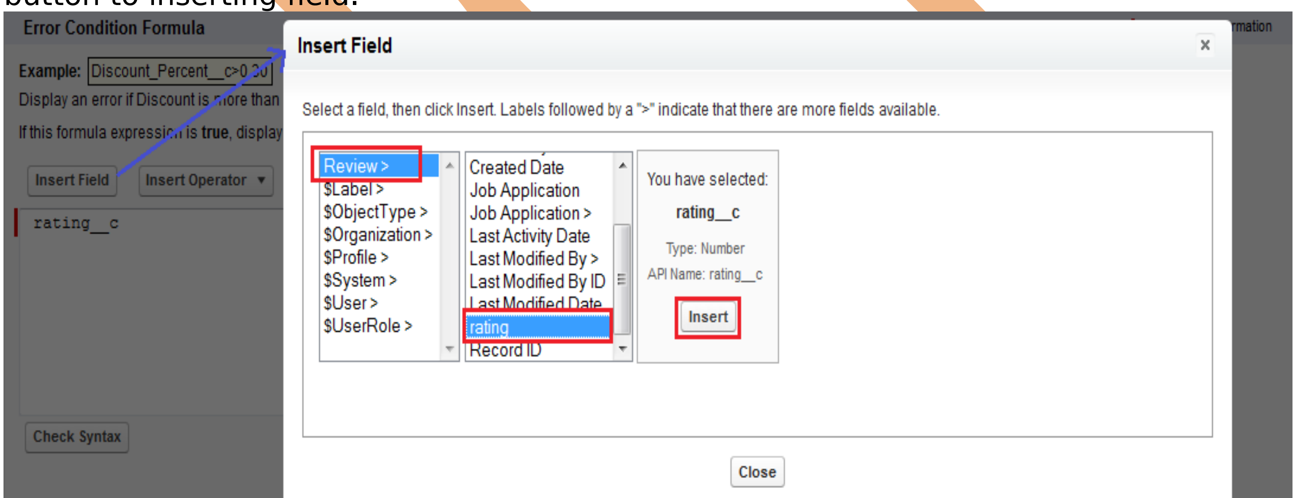
How to create validation :

Click to **Setup** -> **Create** -> **Objects** -> select you **custom tab**(ex- Review) -> there is you can find **Validation Rules** link on near top side page.

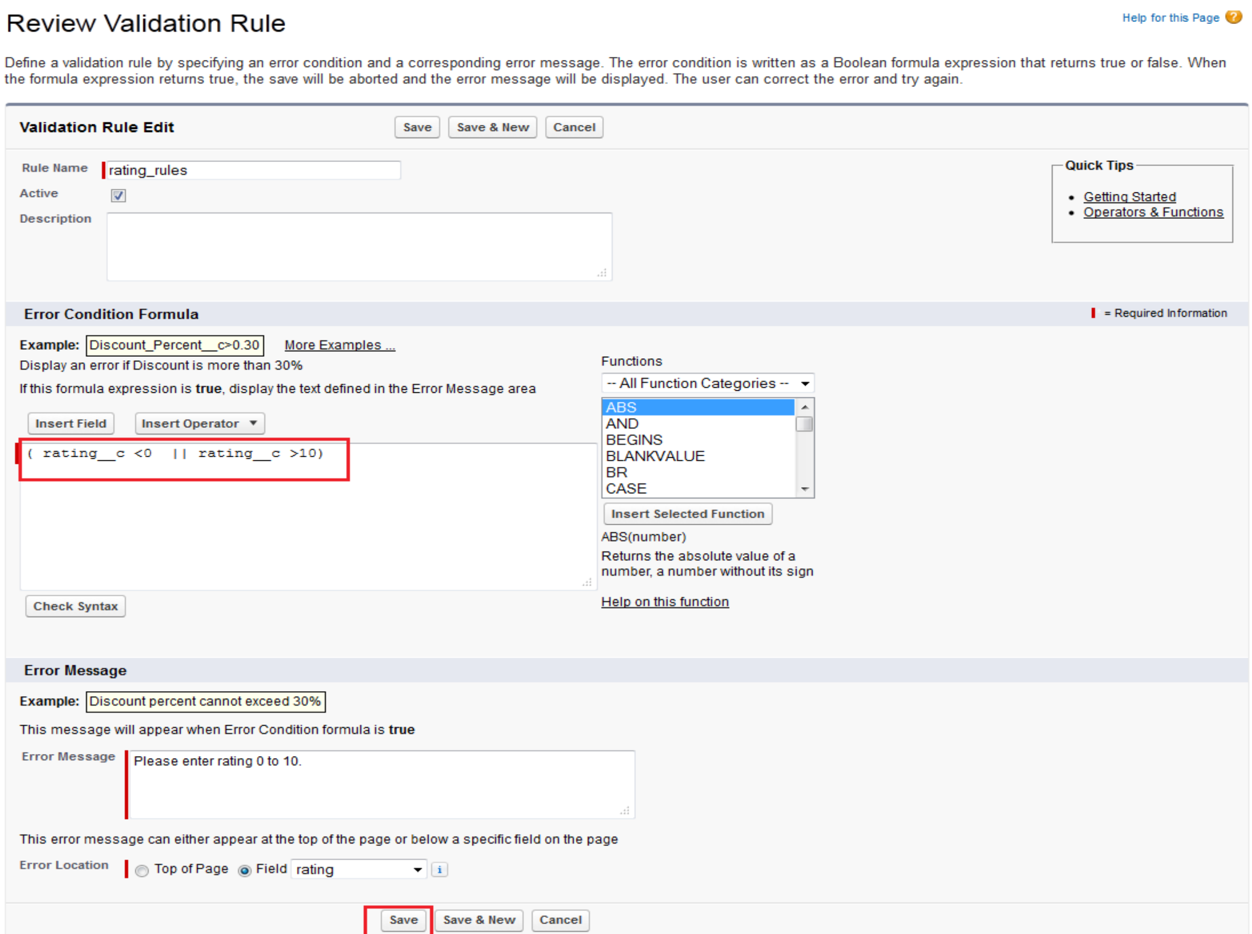
you can see below, just go and mouse hover on this link you can see popup window related to Validation Rules click to **New** button



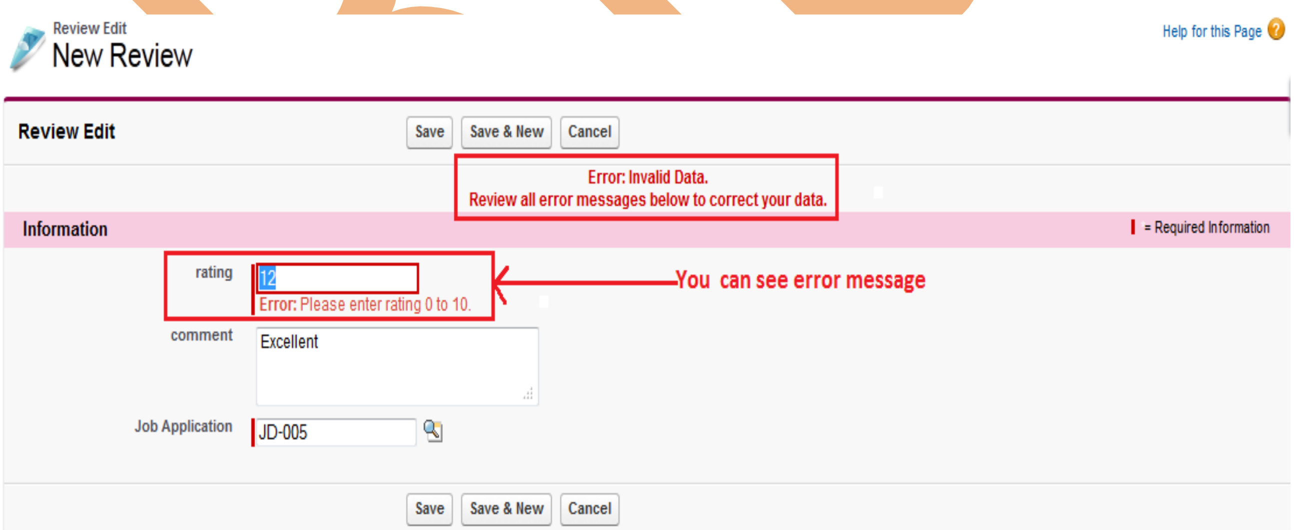
After that show on new page on this page fill all mandatory fields, click to **Insert field** button to inserting field.



You can write validation (Ex :- condition A < 0 || condition B > 10) for adding operator click to **Insert Operator** button. Click to **Save** button for save this validation.

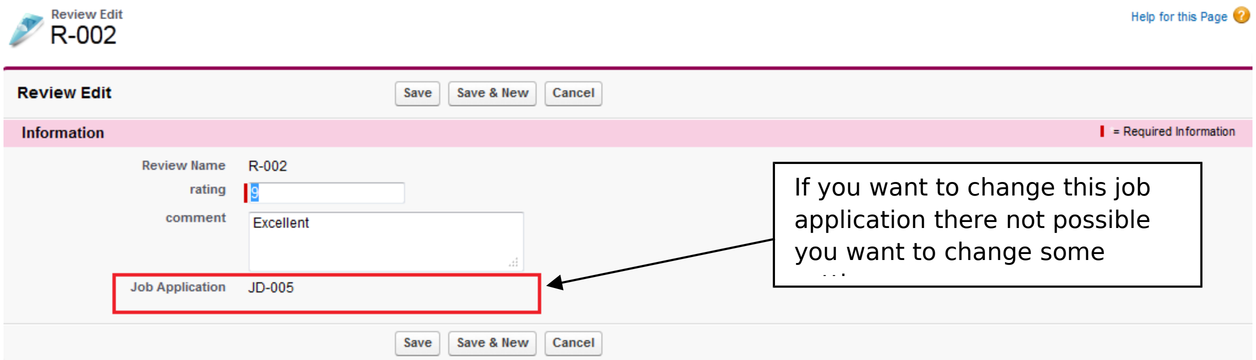


After that you can check if you give wrong entry it will throw error message and not accept greeter then or less then value.
see below image. only give true value .

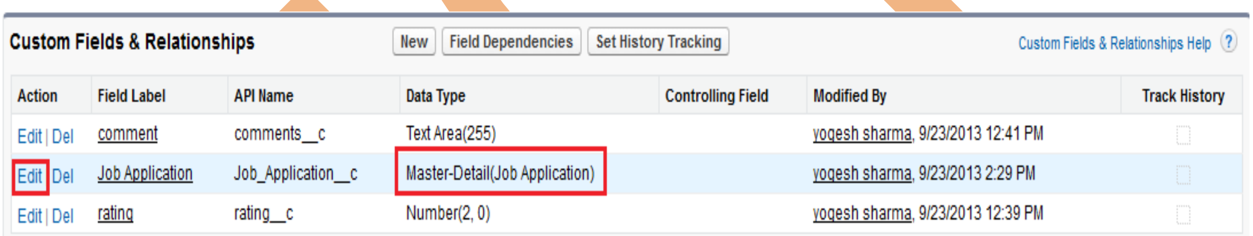


How To Change Setting In Master Detail :

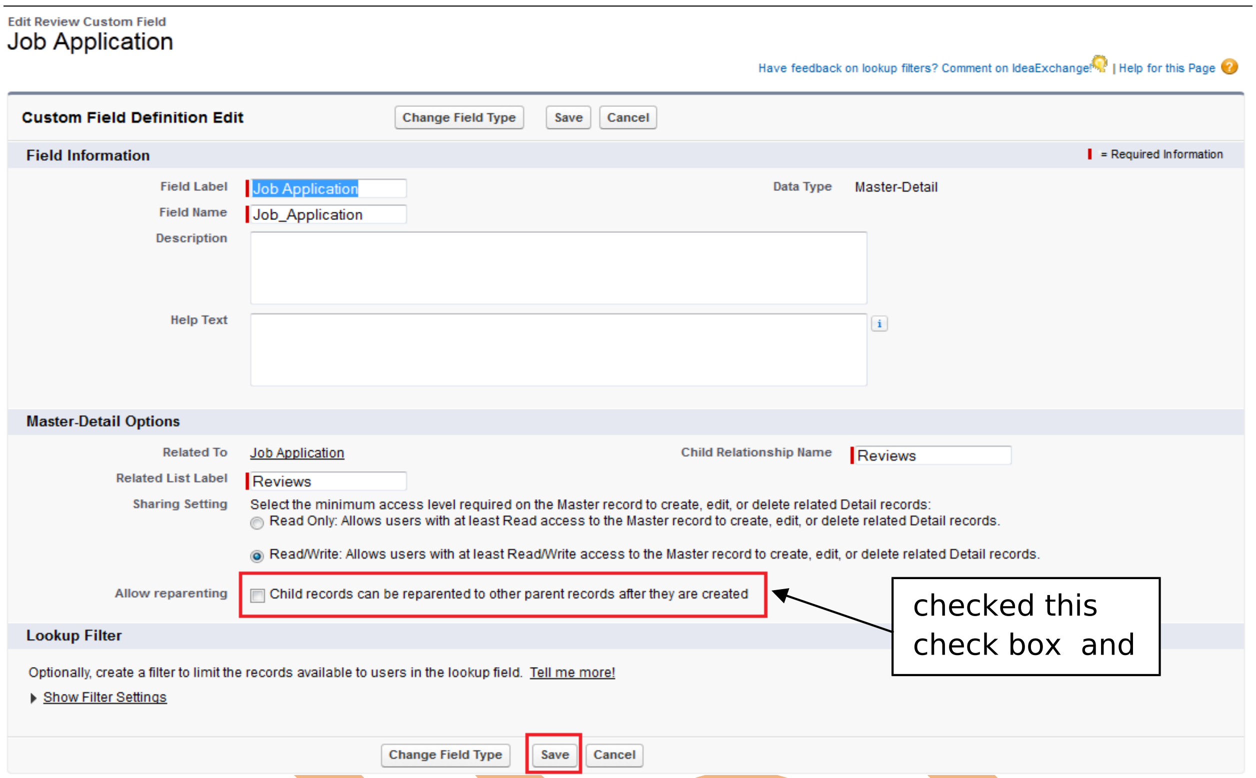
If you want to change **job application** on **Review page** there not possible you want to change some setting.
let's see the step's how to change setting allow to enter field data.



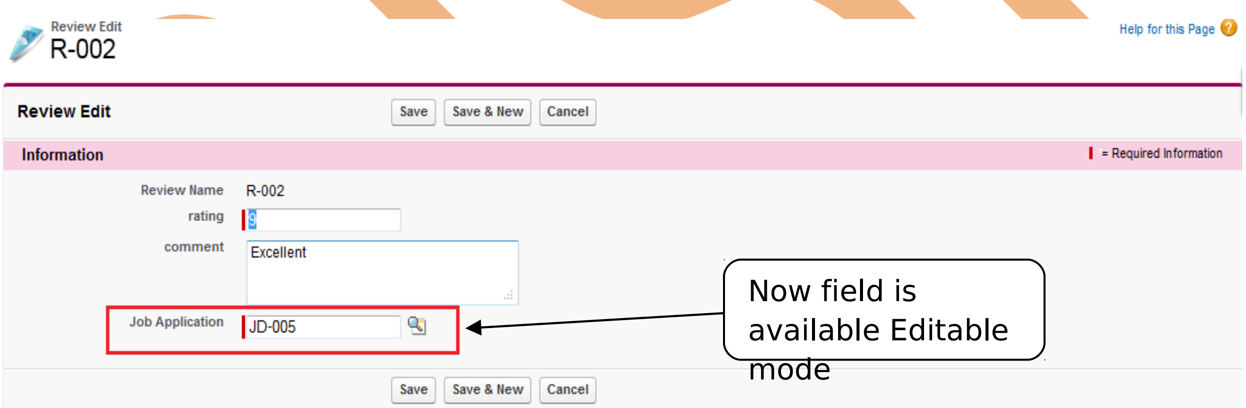
Click to **Setup** -> **Objects** -> Select your **custom object field**(Ex- Review) and in this page find the **Custom Fields & Relationships** there is find **Data type - Master Detail** click to **Edit** button you can see below.



After click on Edit button you can see new screen.



checked this check box and click to Save button. after that go to Review custom object and there is you can see the field is available on editable mode.



Then you can change this job application.

Note :- Profile with modify all or system administrator in master detail.

Roll-up Summary Field in SalesForce

The Roll up summary field support only use of static criteria for evaluating which record to COUNT, SUM, MAX, MIN. it's an advanced formula filed which can perform

Roll-up summary field is 4 types

1. Count
2. Max

3. Min
4. sum

Roll-up Summary Limitations :
- The field being rolled up cannot be a formula field.
- must be master-detail relationship in order to use them.
- you can put only 10 roll-up summary fields.

Note :- Roll-up summary field is only enable for a parent object in a master detail relation.

How to create Roll-up summary field in SalesForce

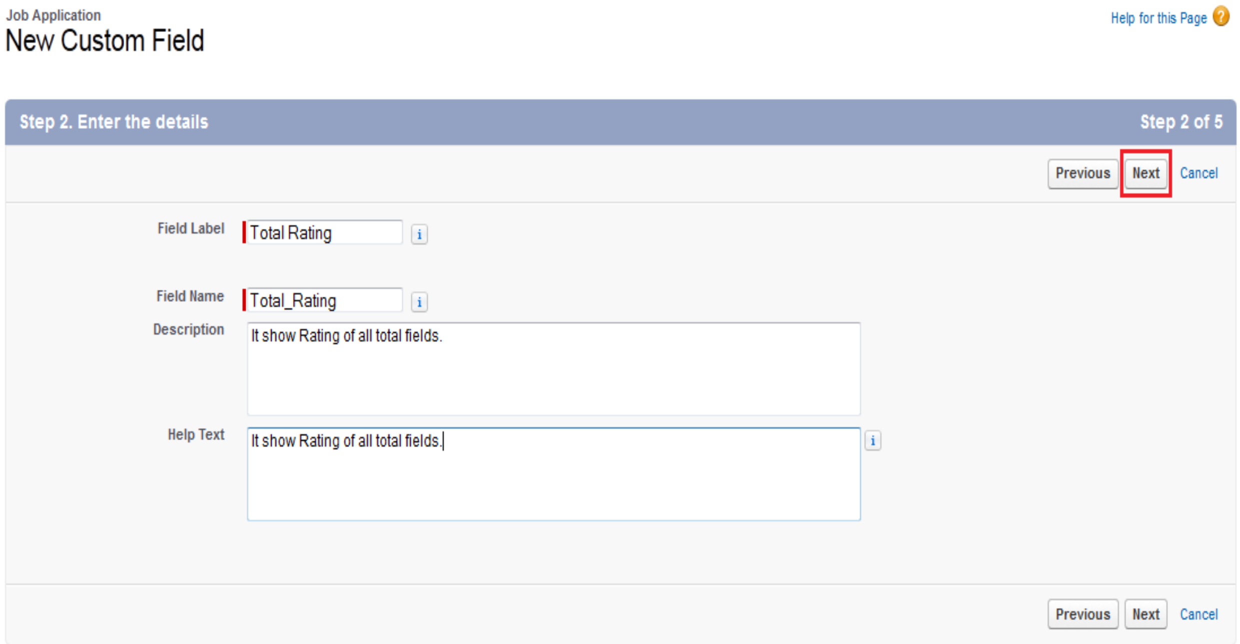
Go to **Setup ->** **Create ->** **Objects ->** **Select your parent object(Ex :- Job Application) ->** **find Custom Fields & Relationships** and click **New** button **->** and select **Roll-Up Summary**

Step 1 :-

checked this Roll-Up Summary field and click to **Next** button.

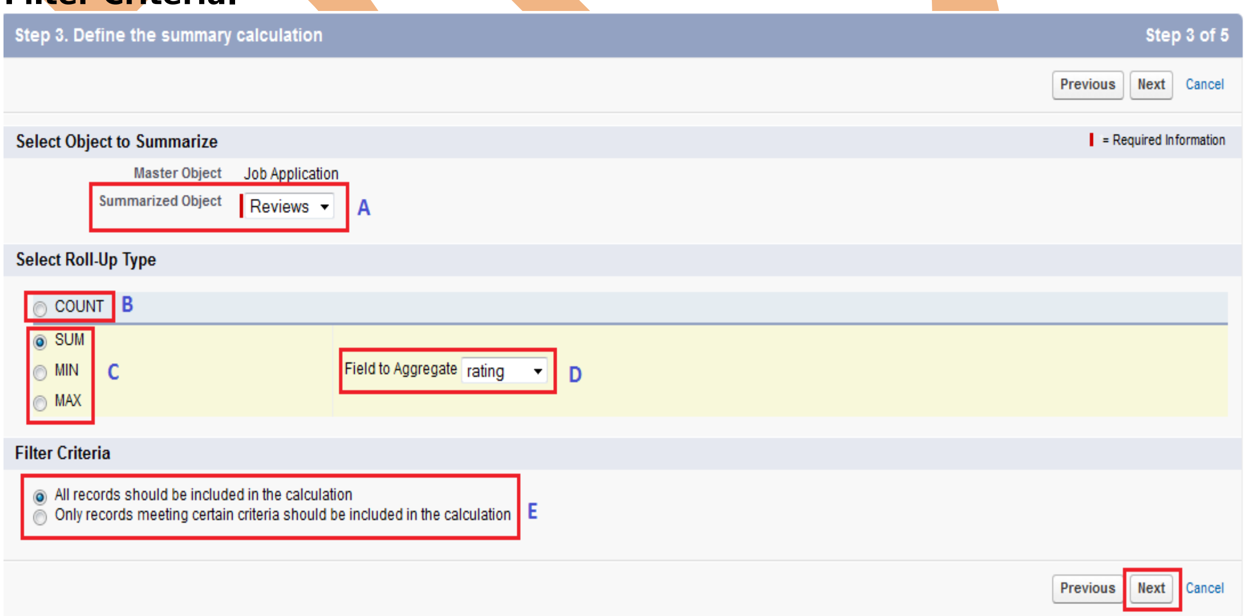
Step 2 :-

Fill the all fields, Field Label, Field Name, Description, Help Text. and click to **Next** button.



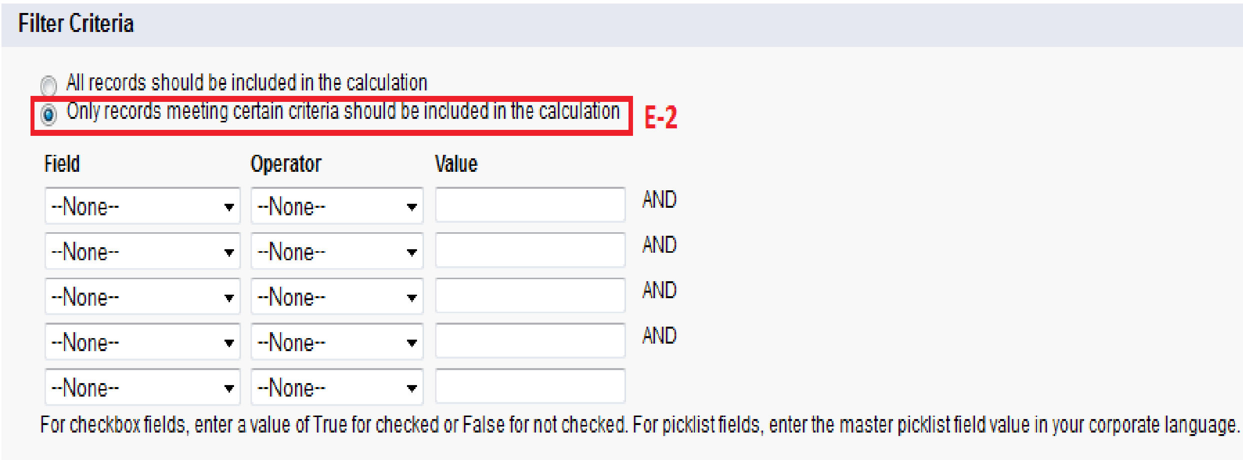
Step 3 :-

There is you can see some fields **Summarized object**, **Select Roll-up** Type , and **Filter Criteria.**



A :- Select **Summarized Object** by using dropdown.
B :- If select **COUNT** for counting for ex :-(1,2,3,....10).
C :- If you select **Sum**, **Min**, **Max** after that select [**D:-** for select rating]

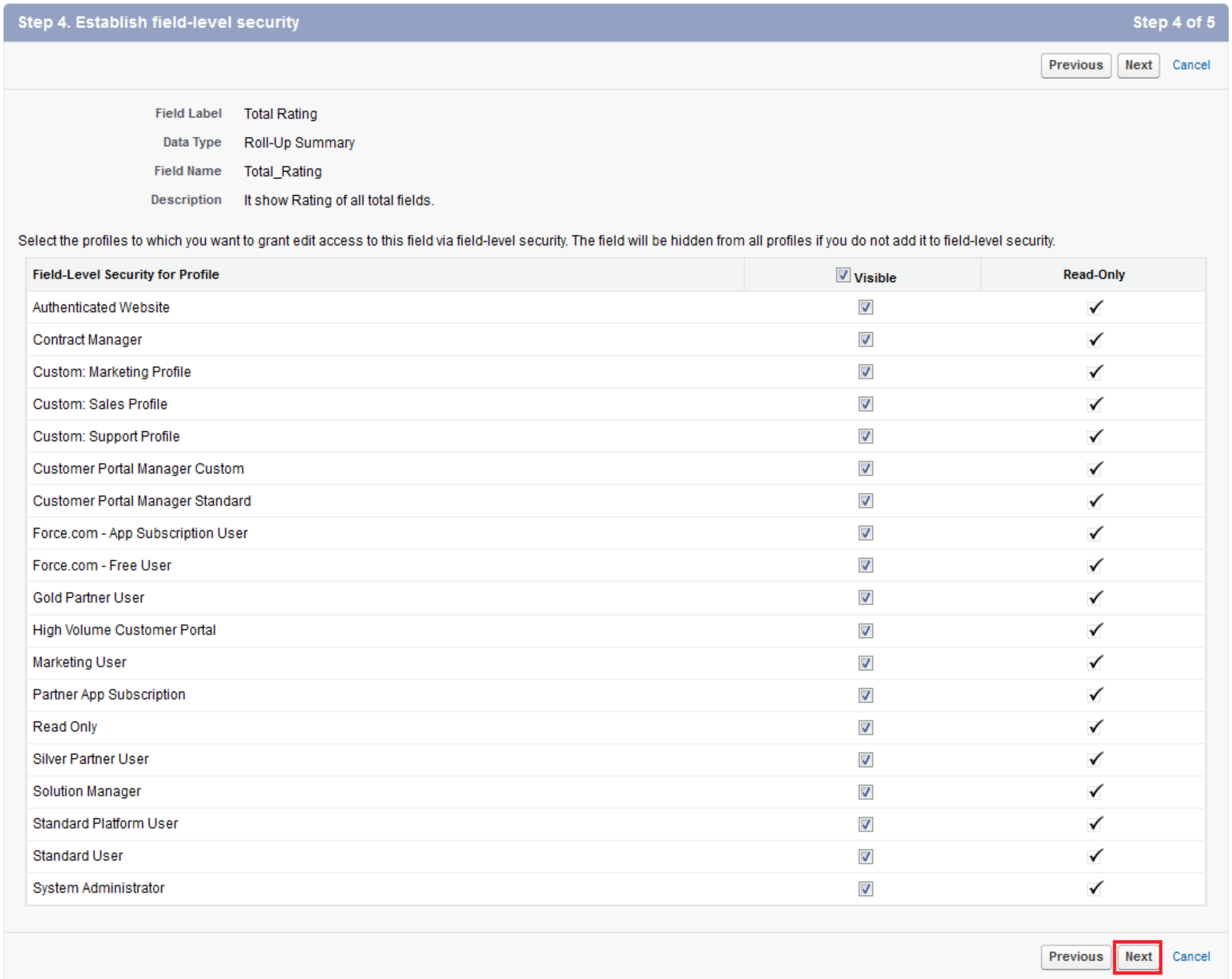
E:- **1**. All records should be include in the calculation for all records.
E :-2. Only records meeting certain should be include in the calculation
when you select option 2 for choose selected item or fields. after select option you can see below how lock the page.



I will select C-1, D and E-1 and click to **Next** button you can see below.

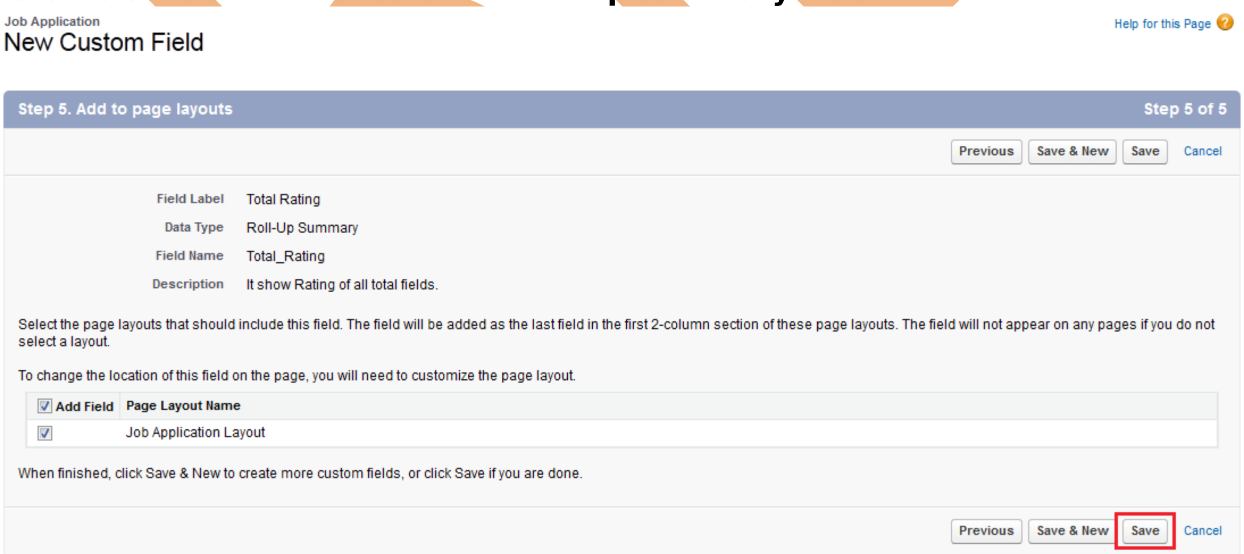
Step 4 :-

Click to **Next** button.

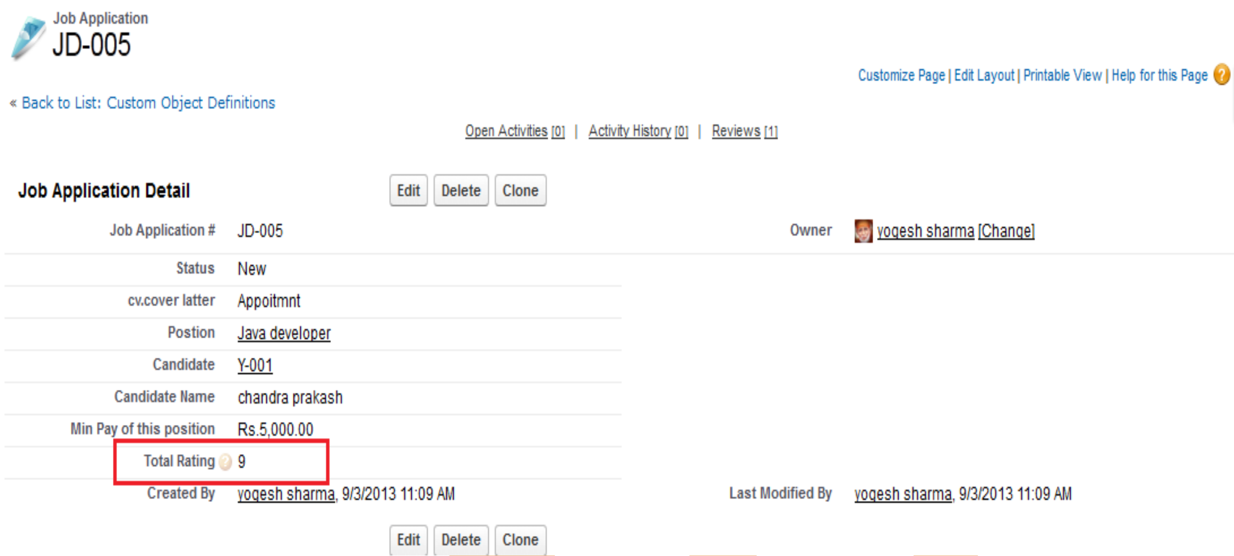


Step 5 :-

Click to Save button for save this **Roll-up summary field.**



After that you can click on **parent object(Ex :- Job Application)** you can see below. **Total Rating .**

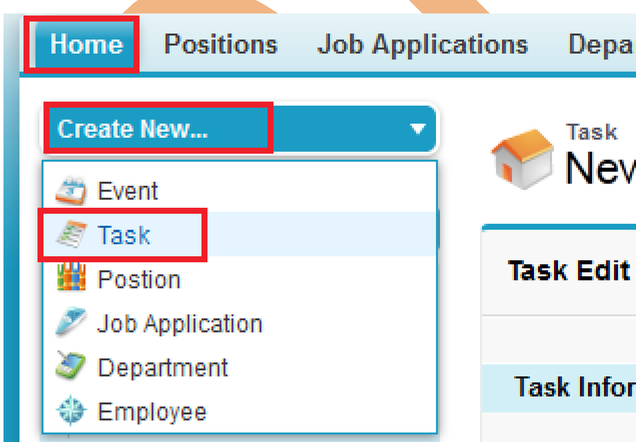


Assign Task in SalesForce

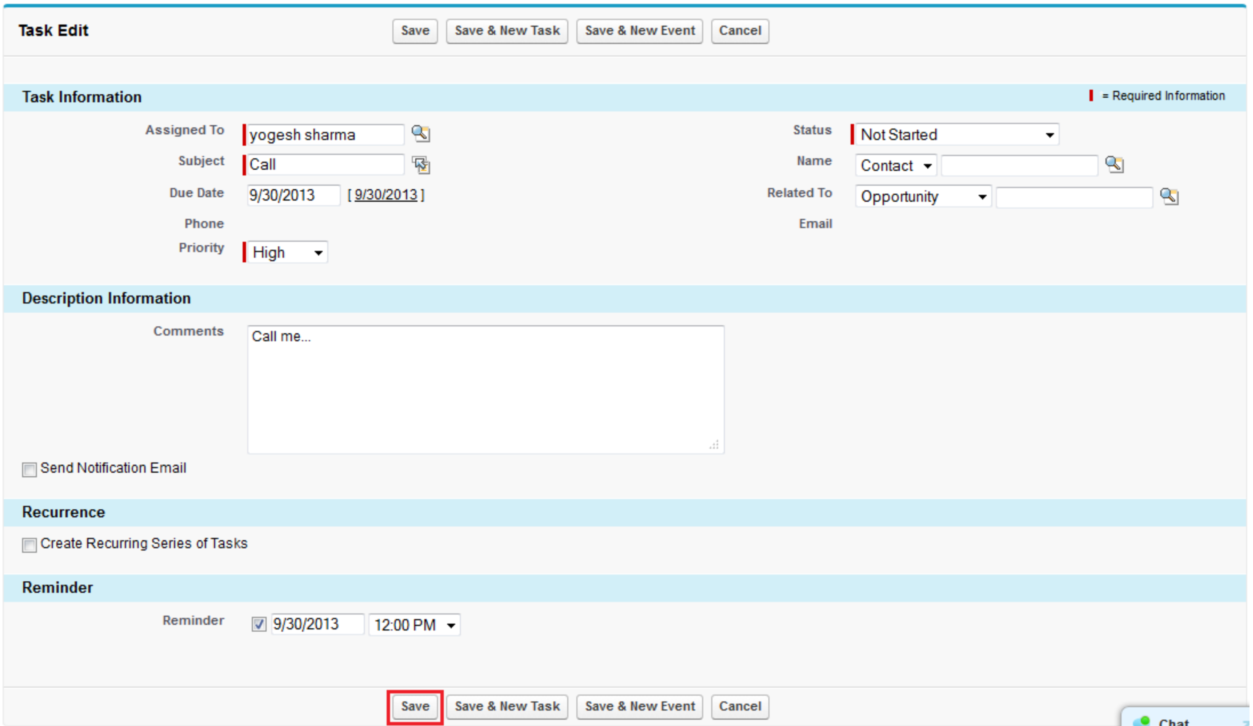
SalesForce provide to your organization to provide any task, meeting schedule, subject, Due date, Priority, Comments, Reminder etc by using **Task** link.

How to Assign Task :

Click to **Home** tab **-> Create New -> Task**



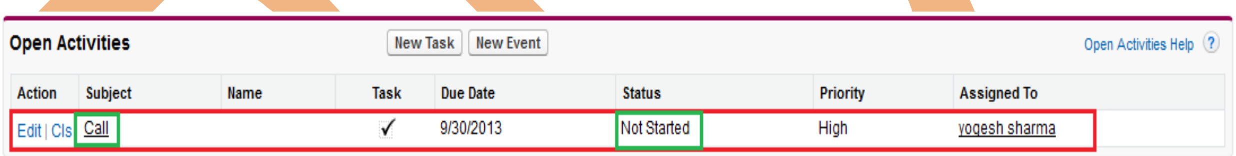
Click to Task link then you need some field fill. these are field show in below.



After that you can save this task.

After that assign task you can see that how to lock assign task status employee side.

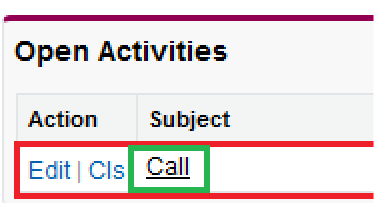
you can see this task **Custom Object(Ex :- Job Application)** click on this field.



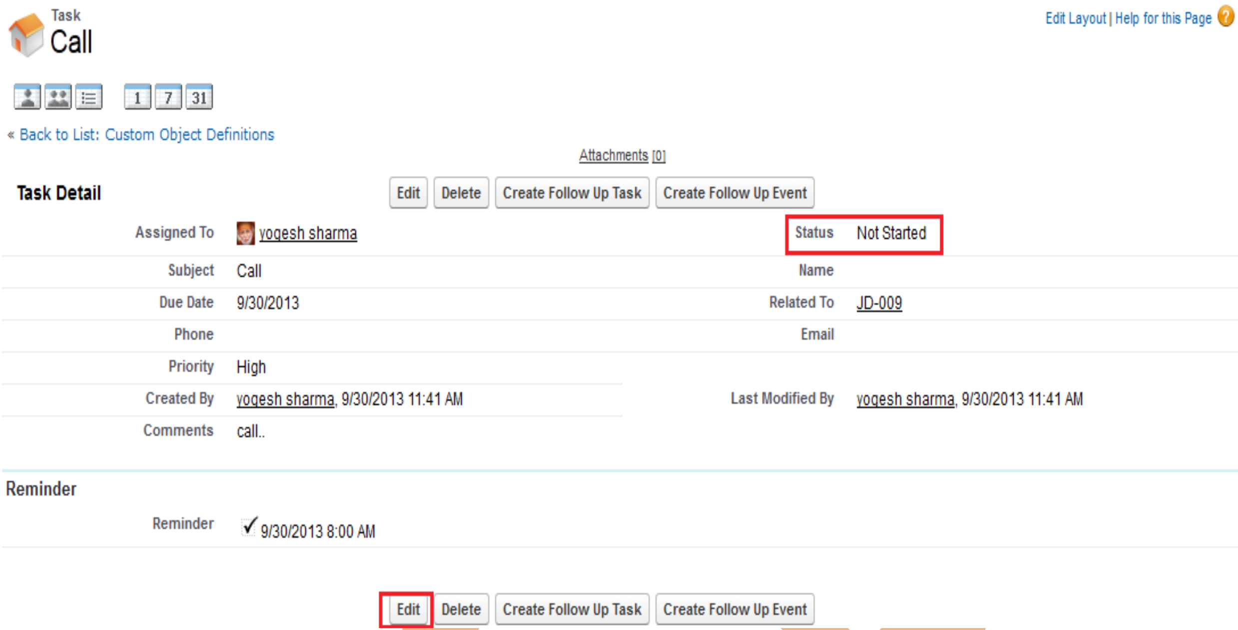
After you completed task you can change **Status**. that time status is Not Started.

How to change Assign Task Status in SalesForce

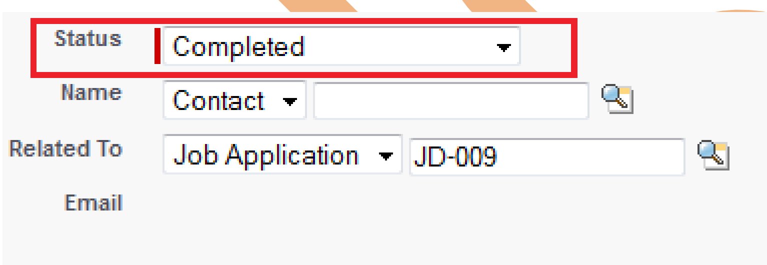
Click to **Custom Object(Ex :- Job Application)** Find that **Open Activities** and find task and click on **Subject** ex:-(Call).



After that New screen you can see below on this page click to **Edit** button and change status.



After change Status **Save** this status.



After that you can see the screen . there you can see task is done. you can see below image.