



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	12 th May 2012
0.1	Review#1	Amit Sharma	13 th May 2012

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BIS

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).

Edit Custom Object
Review

[Help for this Page](#)

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label Example: Account
Plural Label Example: Accounts
Starts with vowel sound

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

Object Name Example: Account

Description

Context-Sensitive Help Setting Open the standard Salesforce.com Help & Training window
 Open a window using a Visualforce page

Content Name

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 Example: Account Name

Data Type

Display Format Example: A-{0000} [What Is This?](#)

Optional Features

Allow Reports
 Allow Activities
 Track Field History

Deployment Status

[What is this?](#)

In Development
 Deployed

Step 2 :-

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

Review Help for this Page ?

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label ⓘ

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length Decimal Places

Number of digits to the left of the decimal point Number of digits to the right of the decimal point

Field Name ⓘ

Description

Help Text ⓘ

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

Unique Do not allow duplicate values

External ID Set this field as the unique record identifier from an external system

Default Value [Show Formula Editor](#)

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

Previous **Next** Cancel

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

Step 3 :-

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

Data Type	
<input type="radio"/> None Selected	Select one of the data types below.
<input type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> 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.
<input type="radio"/> 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.
<input type="radio"/> 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.
<input checked="" type="radio"/> Master-Detail Relationship	<p>Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:</p> <ul style="list-style-type: none"> • 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. <p>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.</p>

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.

Review [Help for this Page](#) 

New Relationship

Step 2. Choose the related object
Select Object
Step 2 of 6

Select the other object to which this object is related.

Related To Job Application ▼

Step 4 :-

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

Review
New Relationship

Step 3. Enter the label and name for lookup field

Field Label: Job Application

Field Name: []

Description: []

Help Text: []

Child Relationship Name: Reviews

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

Previous Next Cancel

Chat

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,

Reviews New Review Reviews Help ?

No records to display

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

Search... Search

yogesh sharma Setup Help Recurment Mangment

Home Positions Job Applications Departments Employees wiki Employment websites Employee List

Expand All | Collapse All

Quick Find

Force.com Home

Administer

- Manage Users
- Manage Apps
- Company Profile
- Security Controls
- Domain Management *New!*
- Communication Templates
- Translation Workbench
- Data Management

Custom Object **Review** Help for this Page

Standard Fields (3) | Custom Fields & Relationships (3) | **Validation Rules (1)** | Page Layouts (1) | Field Sets (BETA) (0) | Search Layouts (4) | Buttons, Links, and Actions (8) | Record Types (0)

Validation Rules New Validation Rules Help

Action	Rule Name	Error Location	Error Message	Active	Modified By
Edit Del	rating_rules	rating	Please enter rating 0 to 10.	<input checked="" type="checkbox"/>	yogesh sharma, 9/23/2013 4:20 PM

Object Name: Review Track Activities

API Name: Review__c Track Field History

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Created By: yogesh sharma, 9/23/2013 11:46 AM Modified By: yogesh sharma, 9/23/2013 11:46 AM

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

Error Condition Formula

Example: `Discount_Percent__c > 0.20`
 Display an error if Discount is more than
 If this formula expression is true, display

`rating__c`

Insert Field Close

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

<ul style="list-style-type: none"> Review > \$Label > \$ObjectType > \$Organization > \$Profile > \$System > \$User > \$UserRole > 	<ul style="list-style-type: none"> Created Date Job Application Job Application > Last Activity Date Last Modified By > Last Modified By ID Last Modified Date rating Record ID 	<p>You have selected:</p> <p>rating__c</p> <p>Type: Number</p> <p>API Name: rating__c</p> <p><input type="button" value="Insert"/></p>
---	---	---

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.

Review 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

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 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 .

Review Edit

[Help for this Page](#)

Review Edit

[Save](#) [Save & New](#) [Cancel](#)

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

Information

rating **Error: Please enter rating 0 to 10.** ← You can see error message

comment

Job Application

[Save](#) [Save & New](#) [Cancel](#)

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.

Review Edit
R-002 Help for this Page ?

Review Edit Save Save & New Cancel

Information = Required Information

Review Name: R-002
rating:
comment:

Job Application

Save Save & New Cancel

If you want to change this job application there not possible you want to change some ...

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.

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	comment	comments__c	Text Area(255)		yoqesh sharma, 9/23/2013 12:41 PM	<input type="checkbox"/>
Edit Del	Job Application	Job_Application__c	Master-Detail(Job Application)		yoqesh sharma, 9/23/2013 2:29 PM	<input type="checkbox"/>
Edit Del	rating	rating__c	Number(2, 0)		yoqesh sharma, 9/23/2013 12:39 PM	<input type="checkbox"/>

After click on Edit button you can see new screen.

Custom Field Definition Edit [Change Field Type] [Save] [Cancel]

Field Information [Required Information]

Field Label: Job Application Data Type: Master-Detail
Field Name: Job_Application
Description: [Text Area]
Help Text: [Text Area]

Master-Detail Options

Related To: Job Application Child Relationship Name: Reviews
Related List Label: Reviews
Sharing Setting: 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](#)

[Change Field Type] [Save] [Cancel]

checked this check box and

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.

Review Edit [Save] [Save & New] [Cancel]

Information [Required Information]

Review Name: R-002
rating: [Dropdown]
comment: Excellent
Job Application: JD-005

[Save] [Save & New] [Cancel]

Now field is available 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 field 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 :-

Job Application Help for this Page ?
New Custom Field

Step 1. Choose the field type Step 1

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

Data Type

<input type="radio"/> None Selected	Select one of the data types below.
<input type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> 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.
<input checked="" type="radio"/> 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.

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 2. Enter the details Step 2 of 5

Field Label

Field Name

Description

Help Text

Step 3 :-

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

Step 3. Define the summary calculation Step 3 of 5

Select Object to Summarize = Required Information

Master Object Job Application

A

Select Roll-Up Type

COUNT B

SUM C

MIN D

MAX

Field to Aggregate D

Filter Criteria

All records should be included in the calculation

Only records meeting certain criteria should be included in the calculation E

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.

Filter Criteria

All records should be included in the calculation
 Only records meeting certain criteria should be included in the calculation **E-2**

Field	Operator	Value	
--None--	--None--		AND

For checkbox fields, enter a value of True for checked or False for not checked. For picklist fields, enter the master picklist field value in your corporate language.

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 4. Establish field-level security Step 4 of 5

Previous Next Cancel

Field Label Total Rating
 Data Type Roll-Up Summary
 Field Name Total_Rating
 Description It show Rating of all total fields.

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 checked="" type="checkbox"/> Visible	Read-Only
Authenticated Website	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
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"/>
Customer Portal Manager Custom	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Customer Portal Manager Standard	<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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
High Volume Customer Portal	<input checked="" 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 checked="" 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 for save this **Roll-up summary field**.

Job Application
New Custom Field

[Help for this Page](#)

Step 5. Add to page layouts Step 5 of 5

Previous Save & New Save Cancel

Field Label Total Rating
 Data Type Roll-Up Summary
 Field Name Total_Rating
 Description It show Rating of all total fields.

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

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

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

[Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Reviews \[1\]](#)

Job Application Detail

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

Job Application #	JD-005	Owner	yogesh sharma [Change]
Status	New		
cv.cover letter	Appoitmnt		
Position	Java developer		
Candidate	Y-001		
Candidate Name	chandra prakash		
Min Pay of this position	Rs.5,000.00		
Total Rating	9		
Created By	yogesh sharma , 9/3/2013 11:09 AM	Last Modified By	yogesh sharma , 9/3/2013 11:09 AM

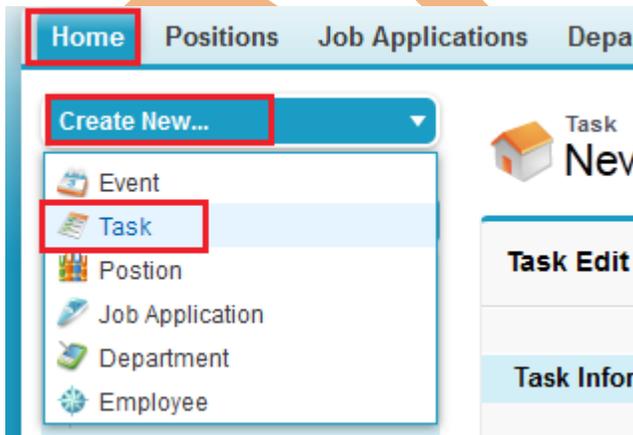
[Edit](#) [Delete](#) [Clone](#)

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.

Task Edit Save Save & New Task Save & New Event Cancel

Task Information = Required Information

Assigned To: yogesh sharma
 Subject: Call
 Due Date: 9/30/2013 [9/30/2013]
 Phone:
 Priority: High

Status: Not Started
 Name: Contact
 Related To: Opportunity
 Email:

Description Information

Comments: Call me...

Send Notification Email

Recurrence

Create Recurring Series of Tasks

Reminder

Reminder: 9/30/2013 12:00 PM

Save Save & New Task Save & New Event Cancel Chat

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.

Open Activities New Task New Event Open Activities Help ?

Action	Subject	Name	Task	Due Date	Status	Priority	Assigned To
Edit Cls	Call		✓	9/30/2013	Not Started	High	yogesh sharma

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).

Open Activities

Action	Subject
Edit Cls	Call

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

< Back to List: Custom Object Definitions

Attachments (0)

Task Detail

Edit Delete Create Follow Up Task Create Follow Up Event

Assigned To  [yogesh sharma](#)

Status Not Started

Subject Call

Name

Due Date 9/30/2013

Related To [JD-009](#)

Phone

Email

Priority High

Created By [yogesh sharma](#), 9/30/2013 11:41 AM

Last Modified By [yogesh sharma](#), 9/30/2013 11:41 AM

Comments call..

Reminder

Reminder 9/30/2013 8:00 AM

Edit Delete Create Follow Up Task Create Follow Up Event

After change Status **Save** this status.

Status **Completed** ▼

Name Contact ▼ 

Related To Job Application ▼ JD-009 

Email

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