Accenture Salesforce Hackathon

Salesforce Solutions
for a sustainable business

Day Three - Customization
03rd May 2022

ACCENTURE SALESFORCE ACADEMY
TECH TRAINING LAB – HIGH LEVEL AGENDA – DAY 3

3 Customization

RACHEL

01 Data Modeling

02 Data Management

03 Lightning Experience Customization

04 Lightning App Builder

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ACCENTURE SALESFORCE ACADEMY
TECH TRAINING LAB – LOW LEVEL AGENDA – DAY 3

Modules	Unit Details	Mins
Data Modeling	Understand Custom and Standard Objects	15 min
	Create Object Relationship	15 min
Data Management	Import Data	30 min
Lightning App Builder	Get Started with the Lightning App Builder	15 min
	Build a Custom Home Page for Lightning Experience	20 min
	Build an App Home Lightning Page	20 min
Lightining Experience Customization	Set Up Your Org	30 min
	Create and Customize Lightning Apps	20 min
	Create and Customize List Views	20 min
	Customize Record Highlights with Compact Layouts	20 min
	Customize Record Details with Page Layouts	30 min

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ACCENTURE SALESFORCE ACADEMY
TECH TRAINING LAB – QUIZ TIME

Day 2 - Quiz Time Solution:

01

Trailhead is

Trailhead and the Trailblazer Community are part of one unified platform. The Trailblazer Community helps you learn relevant skills, connect with other Trailblazers, and give back. Together, Trailhead and the Trailblazer Community are your one-stop shop to learn, earn, and connect from anywhere

02

CRM is

CRM allows you to manage relationships with your customers and prospects and track data related to all of your interactions. It also helps teams collaborate, gather insights from social media, track important metrics, and communicate via email, phone, social, and other channels.

03

Salesforce is

Salesforce is your customer success platform, has everything you need to run your business from anywhere. Using standard features you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

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ACCENTURE SALESFORCE ACADEMY
TECH TRAINING LAB – QUIZ TIME

Day 2 - Quiz Time Solution:

04 Lead & Lead Conversion

Leads are people and companies that are identified as potential customers.
A Lead can be converted **for a Business** in: **Business Account; Business Contact and Opportunity**

05 Account vs Contact

Accounts are companies that you're doing business with, and contacts are the people who work for them. Account and Contact are **Salesforce Standard Object**

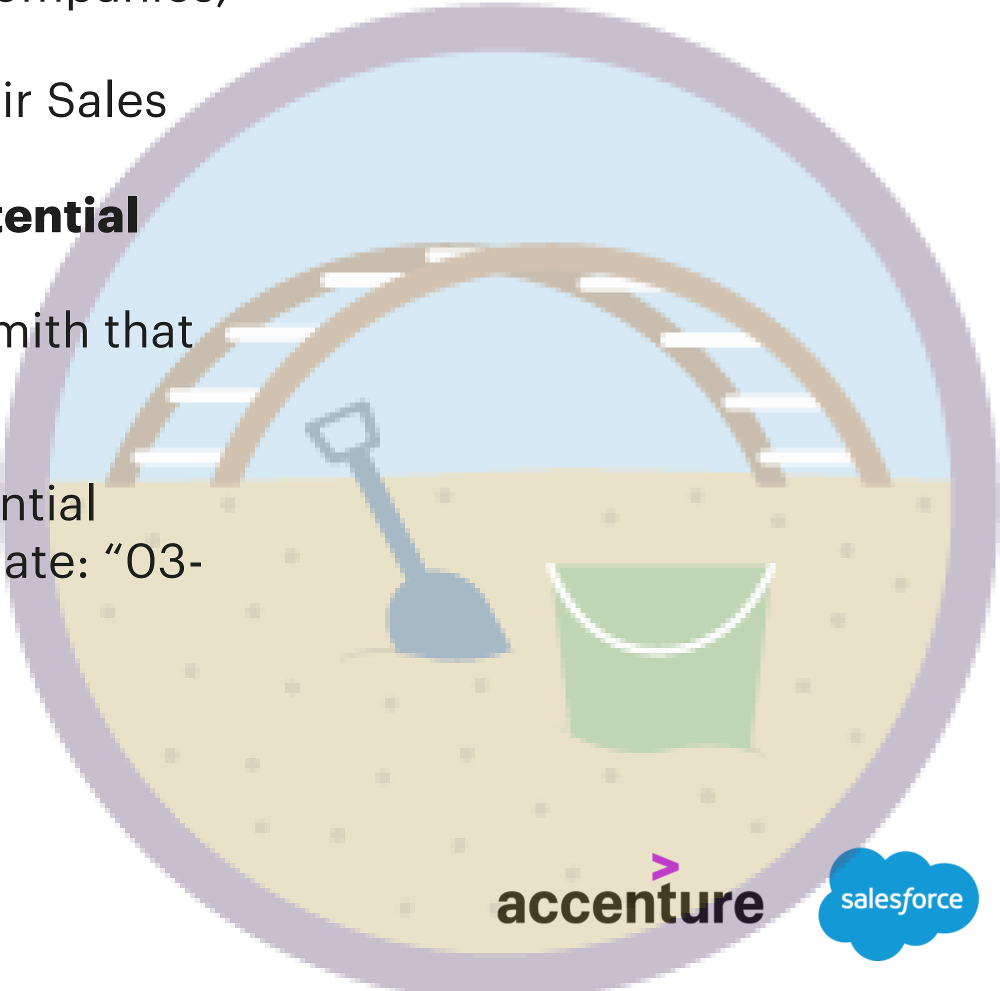
06 Opportunities are:

An Opportunity is a deal in progress. An Opportunity can be created converting a lead or creating a new Opportunity for an existing Account

ACCENTURE SALESFORCE ACADEMY
HANDS – ON CHALLENGE – DAY 2 - RESOLUTION

Your Customer is a firm that sells mobile phones to big companies, the MOBILE SRL.
The MOBILE SRL asks you to meet the requirement of their Sales Agents.
A Sales Agent ask you to track for him in Salesforce **a potential Customer.**
More in depth, the Sales Agent has spoken with Cristal Smith that represent the Company: Cloudy SPA.

The Sale Agent ask you to track a task related to the potential customer: “Call Cristial Smith for Cloudy SPA” with due date: “03-May-2022”.



ACCENTURE SALESFORCE ACADEMY
LEARNING OBJECTIVE

After completing the pre-requisite trailmix, you'll be able to:

- Create Custom Object
- Customize standard object
- Navigate through standard object
- Create relationship between object

TRAILHEAD

[Customization]

In detail, you'll be able to:

- Explain the difference between a standard and custom object
- Identify exactly which module is right for your journey
- Define the difference between record object, field
- Define what an object relationship is
- Define the lightning experience customization

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SALES CLOUD & CUSTOMIZATION
DATA MODELING

A database table in Salesforce is **an Object.**
The column of the table are the **fields** of the object (the information that should be collected).
Each **row of the table** is a single **record** of the Object

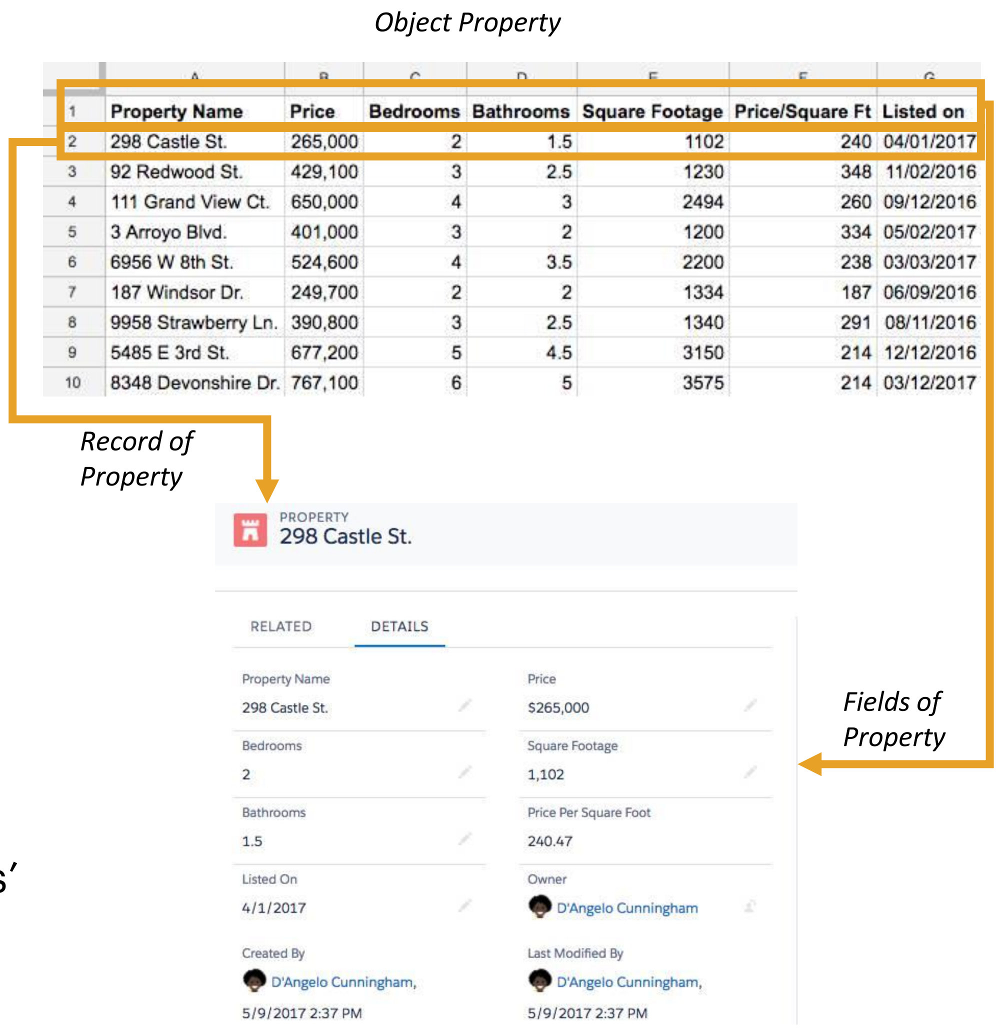
In Salesforce there are different kind of Object:

- **Standard,** are objects that are included with Salesforce (Account, Contact, Lead, Opportunity ecc)
- **Custom,** are objects created to store information specific of your company

Each **Object** (Standard and Customer) **has fields:**

- **Identity:** An account ID looks like 0015000000Gv7qJ
- **System:** CreatedDate, LastModifiedById, and LastModifiedDate
- **Name:** A contact's name can be Julie Bean. A support case's name can be CA-1024
- **Custom:** custom field on the Contact object to store your contacts' birthdays

Each Field has a **data type** that indicates what kind of information are stored in (checkbox, picklist, text, number ecc).



	A	B	C	D	E	F	G
1	Property Name	Price	Bedrooms	Bathrooms	Square Footage	Price/Square Ft	Listed on
2	298 Castle St.	265,000	2	1.5	1102	240	04/01/2017
3	92 Redwood St.	429,100	3	2.5	1230	348	11/02/2016
4	111 Grand View Ct.	650,000	4	3	2494	260	09/12/2016
5	3 Arroyo Blvd.	401,000	3	2	1200	334	05/02/2017
6	6956 W 8th St.	524,600	4	3.5	2200	238	03/03/2017
7	187 Windsor Dr.	249,700	2	2	1334	187	06/09/2016
8	9958 Strawberry Ln.	390,800	3	2.5	1340	291	08/11/2016
9	5485 E 3rd St.	677,200	5	4.5	3150	214	12/12/2016
10	8348 Devonshire Dr.	767,100	6	5	3575	214	03/12/2017

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SALES CLOUD & CUSTOMIZATION
DATA MODELING

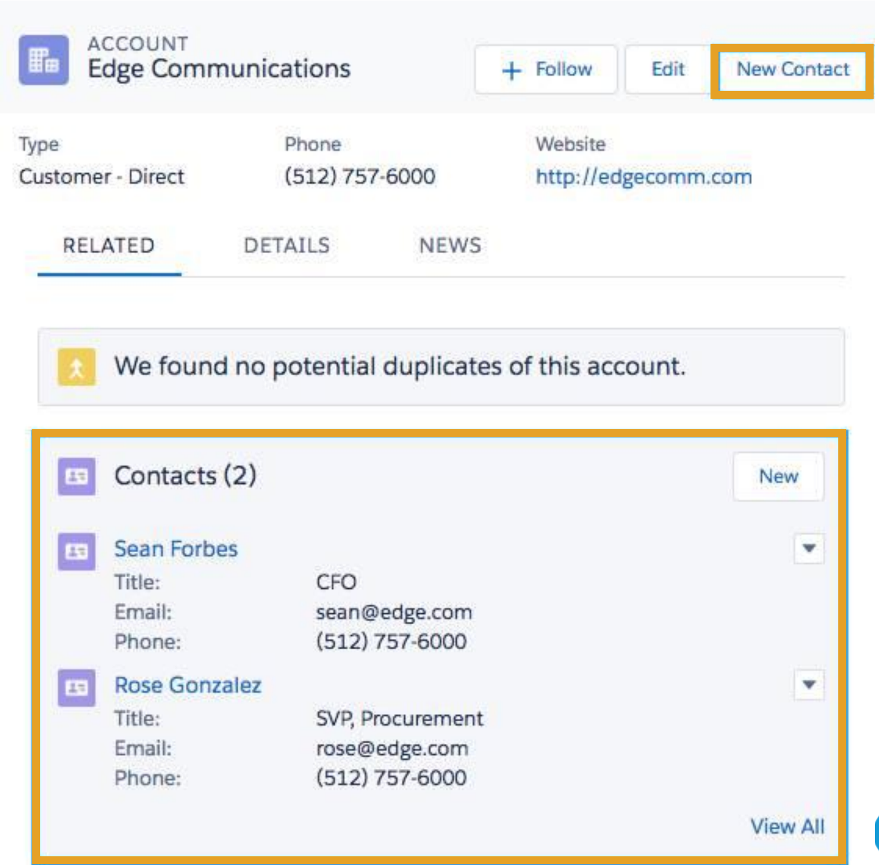
Object relationships are a special field type that connects two objects together.

There are two main type of object relationship:

1) Lookup Relationship: links two objects together so that you can "look up" one object from the related items on another object.
Lookup relationships can be **one-to-one or one-to-many**.

Example and how to create a Lookup relationship?

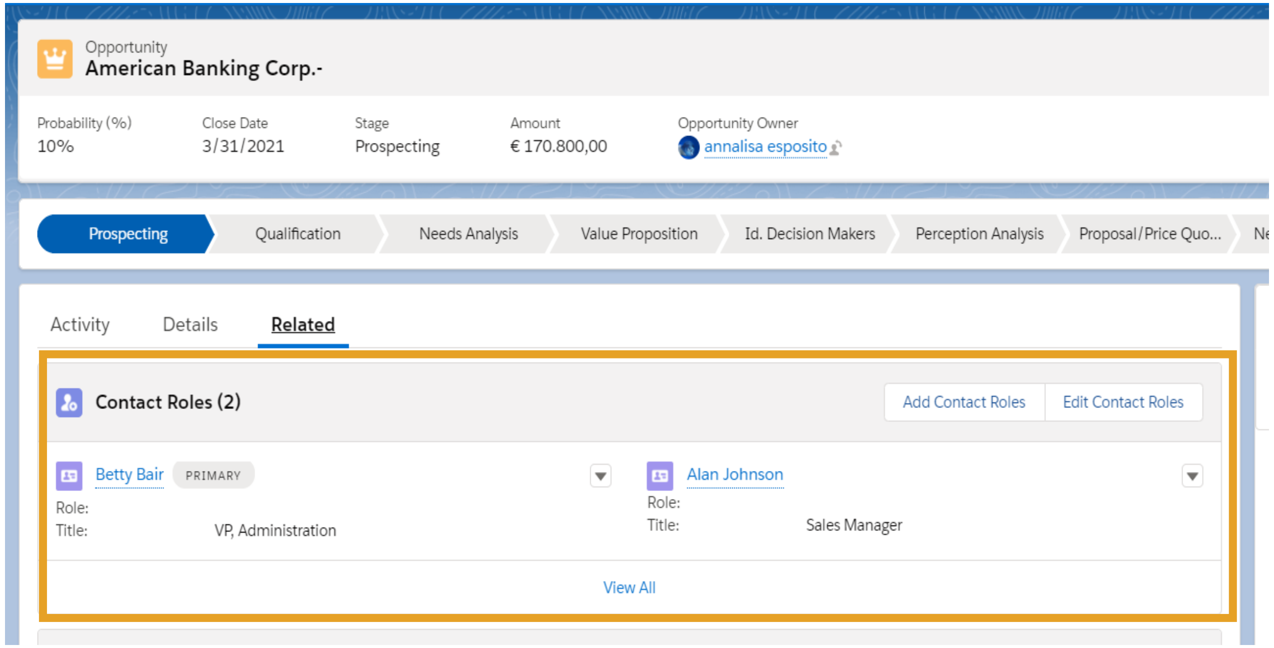
- An Account can have multiple contacts and a contact has only one Account: one to many relationship.
- In this case you have to create a lookup field on the Contact. The field lookup to the Account.
- From the Account you can see all the many related contact from a Related list



SALES CLOUD & CUSTOMIZATION
DATA MODELING

Object relationships are a special field type that connects two objects together.

2) Master Detail Relationship: the detail object doesn't work as a stand-alone. It's highly dependent on the master. In fact, if a record on the master object is deleted, all its related detail records are deleted as well. When you're creating master-detail relationships, you always create the relationship field on the detail object.



Example and how to create a Master detail relationship?

- The Opportunity can have multiple Opportunity contact roles. An Opportunity Contact Role refers to only one Opportunity. Because the Opportunity contact role is a key contact for the Opportunity, the Opportunity contact role has a Master Detail Relationship with the Opportunity

DATA MANAGEMENT

How Import Data in Salesforce?

You can easily import external data into Salesforce, in (.csv) format.

- **Data Import Wizard,** accessible through the Setup menu
  - Import data in common standard objects, such as contacts, leads, accounts, as well as data in custom objects.
  - Import up to 50,000 records at a time.
  - Provides a simple interface

- **Data Loader,** a client application that you must install separately.
  - Import up to five million records at a time, of any data type, either from files or a database connection.
  - Schedule regular data loads, such as nightly imports.

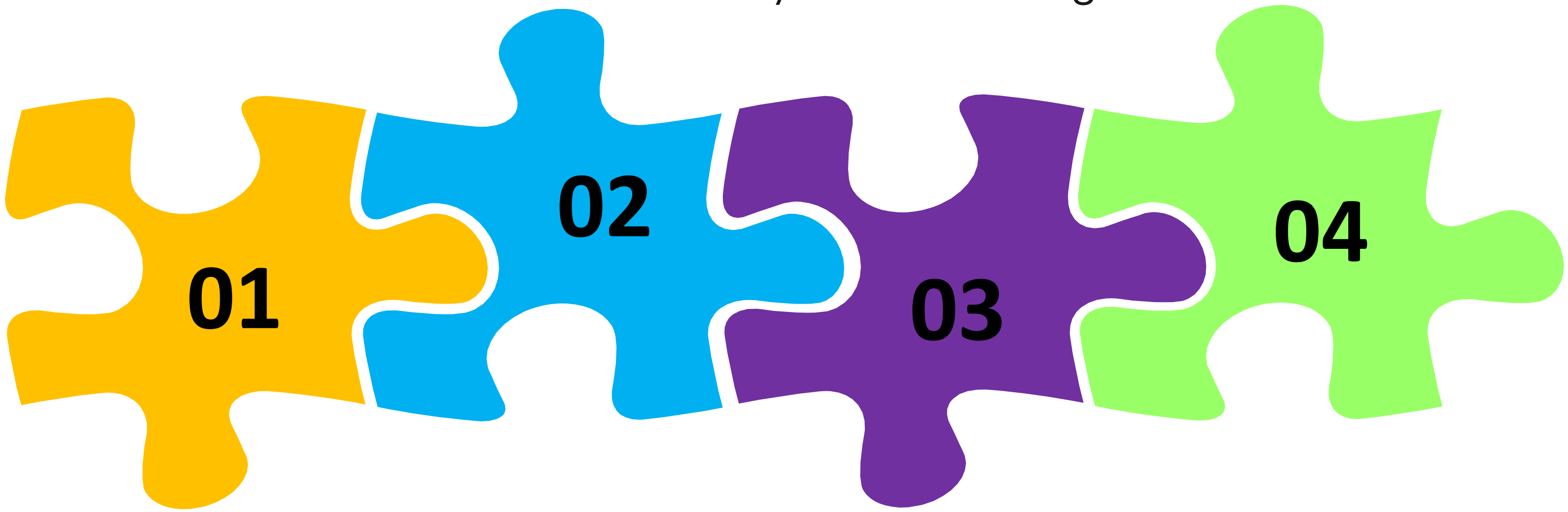
How Export Data in Salesforce?

You can easily export data from Salesforce, **manually or on an automatic schedule**. The data is exported as a set of comma-separated values (CSV) files.

- **Data Export Service,** in-browser service, accessible through the Setup menu.
  - Export data manually once every 7 days (for weekly export) or 29 days (for monthly export).
  - Export data automatically at weekly or monthly intervals.
- **Data Loader,** a client application that you must install separately.
  - Use for automate export
  - User for integrate with another System

CUSTOMIZATION
LIGHTNING EXPERIENCE CUSTOMIZATION

Create **Custom Object** and define a **New Tab** to access using the four-step new custom object wizard. The information you need to provide at each step will differ depending both on selection of the type custom object Record Name and on new Tab to access the stored data you are creating.



Custom Object

- Label
- Description
- Type of Record Name
- Allow search
- Launch New Custom Tab Wizard after saving this custom object

Tab

- Tab Style
- Description

Set Field-Level Security

- Define Tab visibility by profile

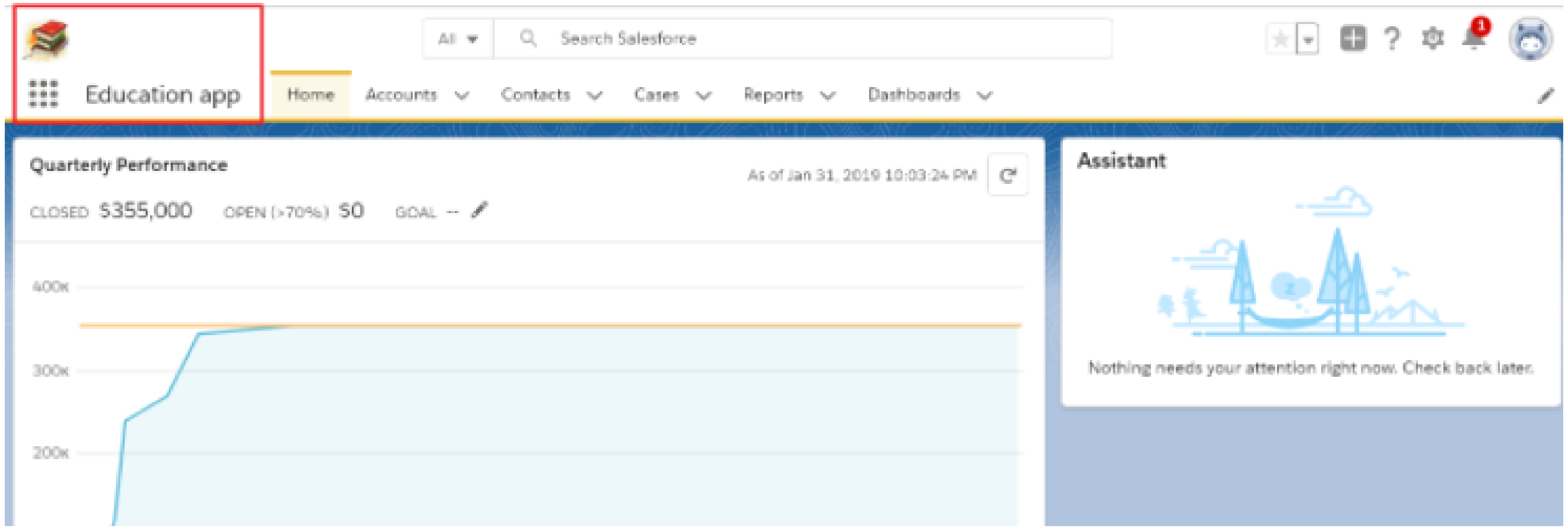
Choose custom App

- Set Tab Visibility in custom Apps

CUSTOMIZATION
LIGHTNING EXPERIENCE CUSTOMIZATION

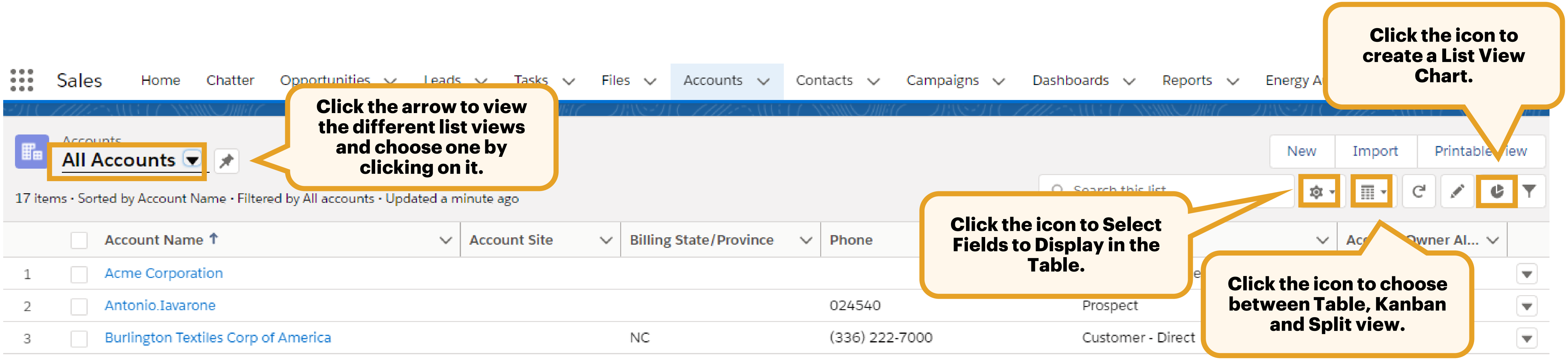
We can brand and customize **Lightning apps** to help users work more efficiently. We can customize the following features

- The navigation bar color brand it with a logo.
- Make the app available in the App Launcher for certain user profiles.
- The utility bar is a fixed footer that opens components in docked panels. you can add a **utility bar** for **common processes** and tools, like **Recent Items, Dialer, Notes** and **Open CTI.**
- **Customize** which **items appear** in the app's **navigation bar**.
- If the user doesn't have access or permissions to the app, Top Results includes the **Account, Contact, Opportunity, Case, Lead, User**, and **Group objects** until the user's most frequently used objects are determined.



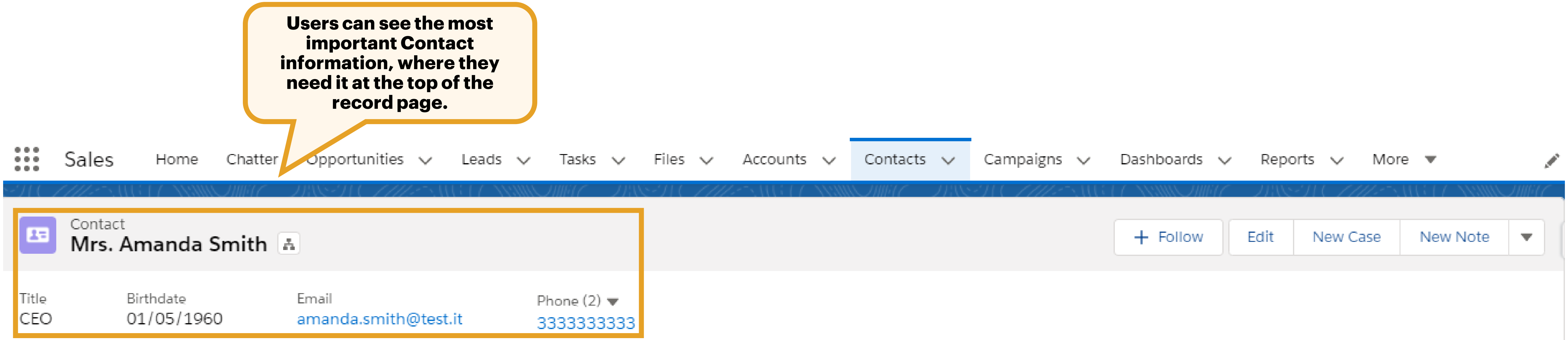
CUSTOMIZATION
LIGHTNING EXPERIENCE CUSTOMIZATION

List views are filtered and structured categories of records in Salesforce. They allow you to sort records in a manner that makes sense to you, making it easier to find specific records. The View drop down can be accessed through the home pages of each of the tabs such as Leads, Accounts, Contacts, Opportunities.



CUSTOMIZATION
LIGHTNING EXPERIENCE CUSTOMIZATION

Compact layouts are used to display the key fields of a record whenever the minimum required details of the record is needed.
Compact layouts control which fields users see in the **highlights panel** at the top of a record. It also control the fields that appear in the **expanded lookup card** that we see when we hover over a link in record details.



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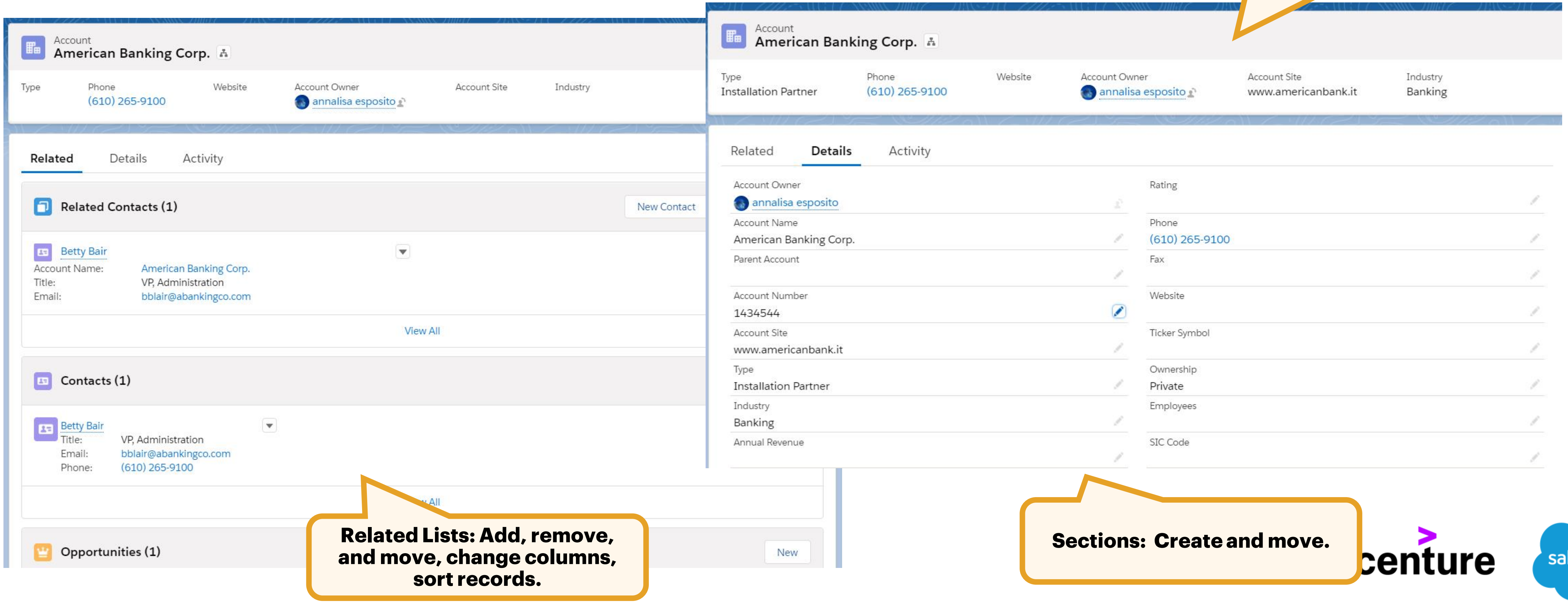
CUSTOMIZATION
LIGHTNING EXPERIENCE CUSTOMIZATION

A **page layout** controls the fields, sections, related lists, buttons and quick action that appear when users view or edit a record. You can modify an object’s default page layout or create a new one.

To ensure that users see the correct page layouts, assign page layouts to user profiles, through “Page layout assignment” button.



CUSTOMIZATION
LIGHTNING APP BUILDER

The **Lightning App Builder** is a point-and-click tool that makes it easy to create **custom pages** for the Salesforce **mobile app** and **Lightning Experience**, giving your users what they need all in one place.

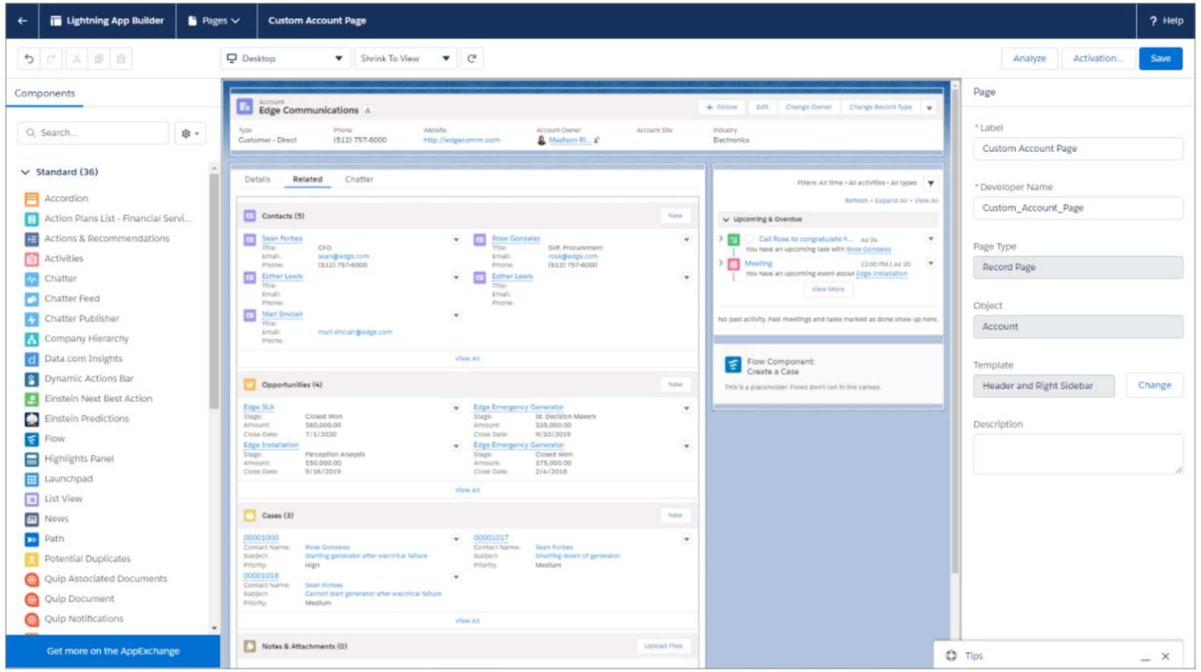
When you edit a Lightning app from the App Manager in **Setup**, you're brought into the *Lightning App Builder* to manage the app's settings. You can update the app's branding, navigation, app options, and manage the Lightning pages assigned to that app all inside the Lightning App Builder.

A Lightning component is a compact, configurable, and reusable element that you can add to a Lightning page in the Lightning App Builder.

Lightning pages support

- **Standard Components**,
- **Custom Components**
- **Third-Party Components on AppExchange**

You can create different types of Lightning pages with the Lightning App Builder: **App Page**, **Home Page** and **Record Page.**

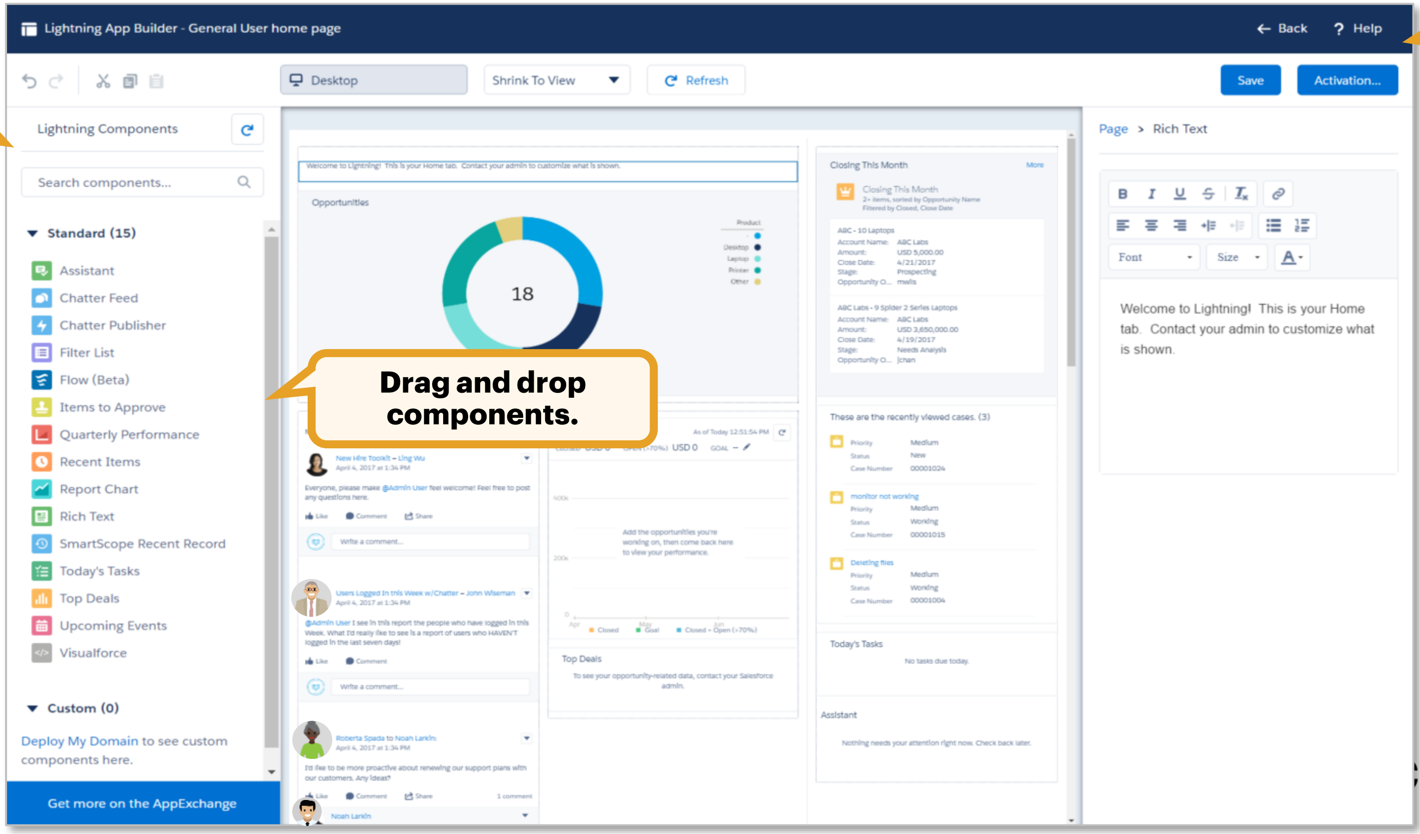


CUSTOMIZATION
LIGHTNING APP BUILDER

The Home page is a versatile canvas for bringing relevant updates, details, and summaries to your users with Lightning components.

- Apply standard or custom Lightning components;
- Update component properties;
- Assignable to user profiles.

Apply Standard and Custom components.



Drag and drop components.

Be sure to Activate when done!

CUSTOMIZATION
LIGHTNING APP BUILDER

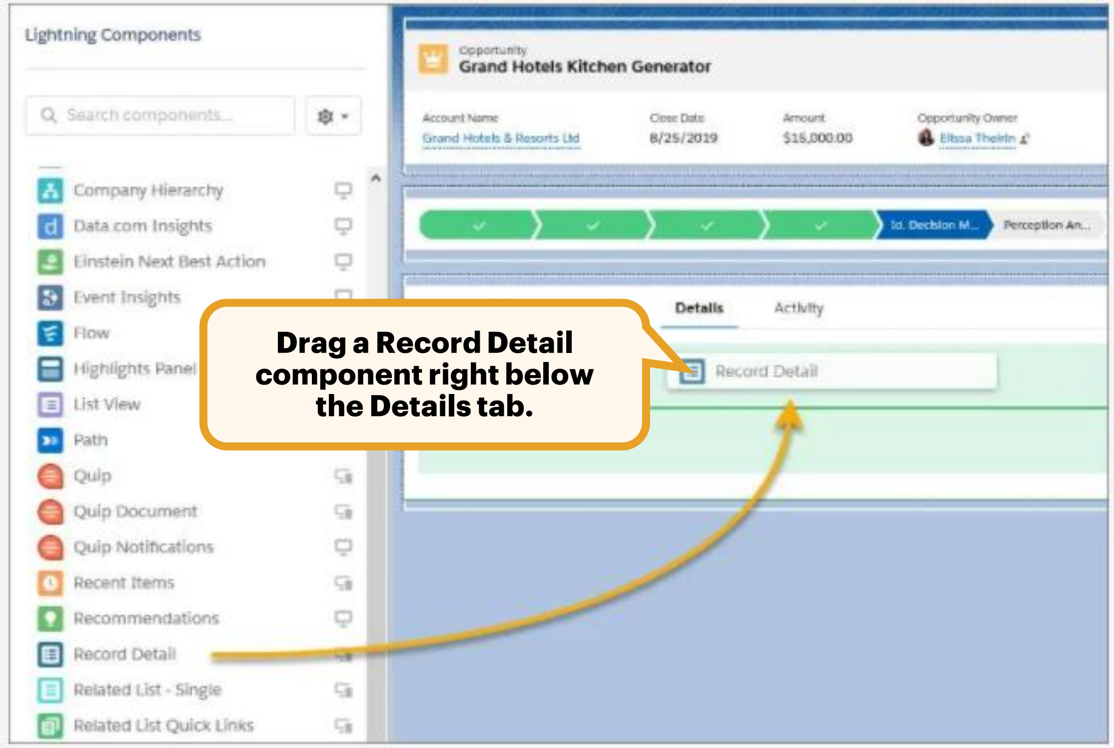
Record Page is used to build custom lightning record pages containing the components with related records based on the user requirement. Custom record pages are supported in Lightning Experience and in the Salesforce mobile app.

Just like the Home page, you can create a custom record page in different ways:

- Create it from scratch **using a template,**
- **clone one of your other custom record pages,**
- **edit an existing page.**

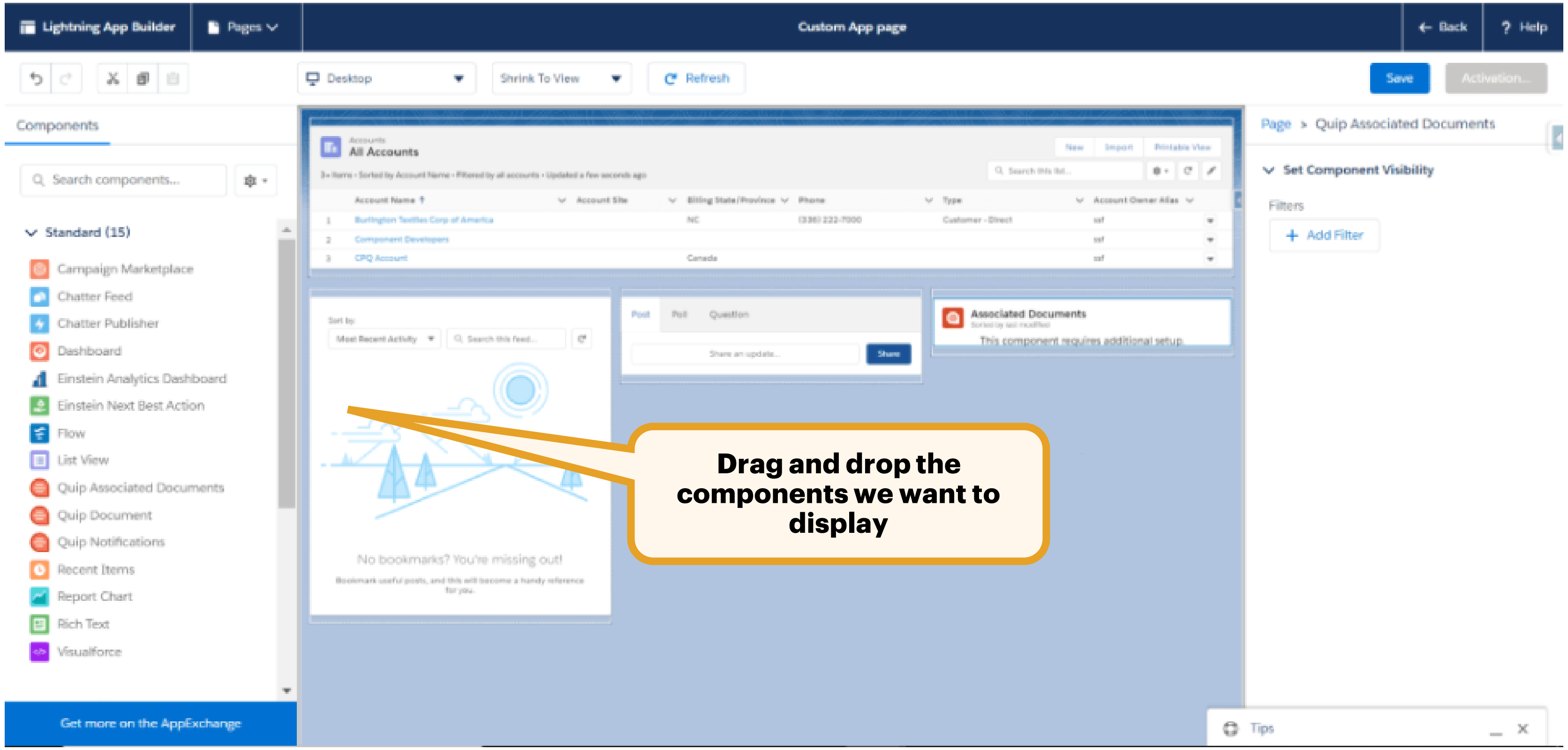
However, unlike the Home page, custom record pages are not only supported in **Lightning Experience** on desktop but also in the **Salesforce mobile app.**

Component visibility properties appear when you select a component on a record, app, or Home page in the Lightning App Builder. This behavior applies to standard components, custom components, and components from AppExchange. No need to do anything to your custom components. It's all handled by the Lightning App Builder. If you don't define a filter, the component displays on the Lightning page as usual. When you define one or more filters and set the filter logic for a component, the component is hidden until the filter logic criteria are met.



CUSTOMIZATION
LIGHTNING APP BUILDER

When we select an app in the org like a **sales app** or **service app** or any **other custom app** the **page** that appears is known as **APP Page** (Sales App or any custom app we have created). It will be **like a home page** for each app.
Just like the other pages, your users can't access your app page **until you activate it**. During activation, you can **customize the page's custom tab label**, adjust its **visibility**, and **set its position** in the Salesforce mobile app and Lightning Experience app navigation bars, all in one place.



ACCENTURE SALESFORCE ACADEMY
HANDS – ON CHALLANGE

Hands-on Challenge

Your Customer is a firm that sells mobile phones to big companies, the MOBILE SRL.
The MOBILE SRL asks you to meet the requirement of their Sales Agents.
The Sales Agents needs **to track a new information** when they register a new potential customer in Salesforce: **the environmental sustainability rank**. In particular, the Sale Agents select a value from the following: Low, Medium, High.
When the potential customer become a customer, the Sale Agents need to see the environmental sustainability rank on the Account object.
Furthermore, each month the Sale Agents call their Customer in order to collect information on the **Customer Satisfaction**:

- Satisfaction Rate: from 1 to 5
- Sales Experience: Very Bad, Bad, Good, Very Good

The Sale Agents wants to see all the Customer Satisfaction from the Account related list.

ACCENTURE SALESFORCE ACADEMY
TECH TRAINING LAB – QUIZ TIME

And now is your time!

Test your knowledge, instructions below

https://traininggarage-developer-edition.eu40.force.com/QuizTime/s/

Insert your Name, Surname and the code: TV_02

Thank You