

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



01
[Data Modeling](#)



02
[Data Management](#)



04
[Lightning App Builder](#)



03
[Lightning Experience Customization](#)



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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
Lightning 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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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



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.

02

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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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



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**

05

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



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HANDS – ON CHALLENGE – DAY 2 - RESOLUTION

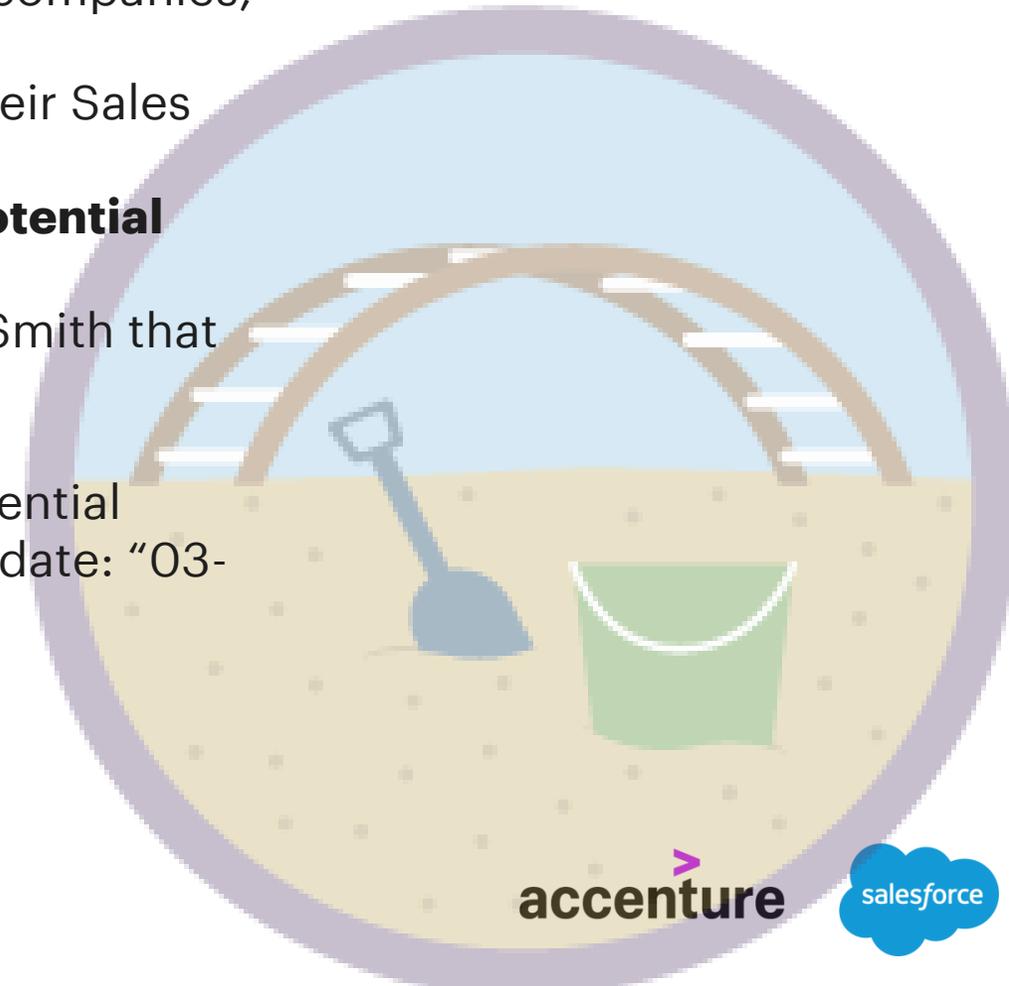
Your Customer is a firm that sells mobile phones to big companies, the MOBILE SRL.

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 Cristal Smith for Cloudy SPA” with due date: “03-May-2022”.



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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



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

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 00150000000Gv7qJ
- **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).

Object Property

	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

Record of Property

PROPERTY
298 Castle St.

RELATED DETAILS

Property Name 298 Castle St.	Price \$265,000
Bedrooms 2	Square Footage 1,102
Bathrooms 1.5	Price Per Square Foot 240.47
Listed On 4/1/2017	Owner D'Angelo Cunningham
Created By D'Angelo Cunningham, 5/9/2017 2:37 PM	Last Modified By D'Angelo Cunningham, 5/9/2017 2:37 PM

Fields of Property

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

The screenshot shows the Salesforce interface for an Account record. At the top, there are buttons for '+ Follow', 'Edit', and 'New Contact'. Below these are fields for 'Type' (Customer - Direct), 'Phone' ((512) 757-6000), and 'Website' (http://edgecomm.com). A 'RELATED' tab is selected, showing a message: 'We found no potential duplicates of this account.' Below this, a list of related contacts is displayed, including Sean Forbes (CFO) and Rose Gonzalez (SVP, Procurement). A 'View All' link is at the bottom right of the list.

Type	Phone	Website
Customer - Direct	(512) 757-6000	http://edgecomm.com

RELATED DETAILS NEWS

We found no potential duplicates of this account.

Contacts (2) New

Sean Forbes	
Title:	CFO
Email:	sean@edge.com
Phone:	(512) 757-6000
Rose Gonzalez	
Title:	SVP, Procurement
Email:	rose@edge.com
Phone:	(512) 757-6000

View All



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.

The screenshot displays a Salesforce Opportunity record for 'American Banking Corp.' with a probability of 10%, a close date of 3/31/2021, and a stage of 'Prospecting'. The amount is € 170.800,00 and the opportunity owner is annalisa.esposito. The record is in the 'Prospecting' stage of a sales process. Below the main record, the 'Related' section shows two contact roles: Betty Bair (Primary, VP, Administration) and Alan Johnson (Sales Manager). Buttons for 'Add Contact Roles' and 'Edit Contact Roles' are visible.

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

SALES CLOUD & CUSTOMIZATION

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.

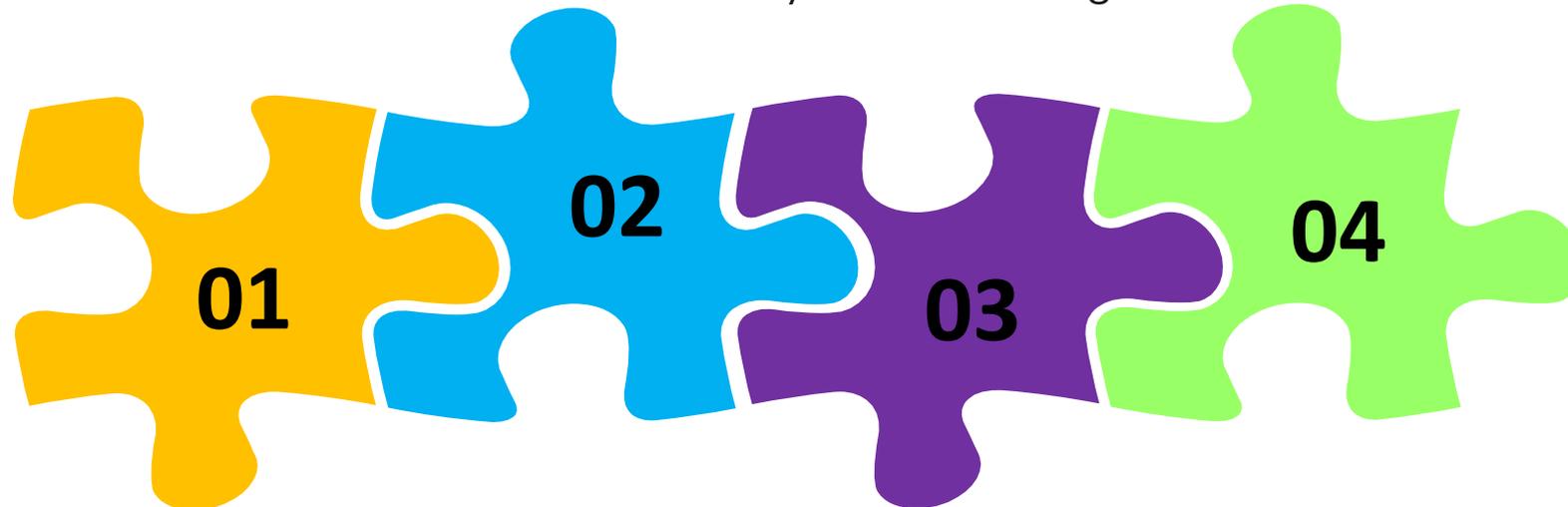
- **Data Export Service**, in-browser service, accessible through the Setup menu.
 - Export data manually once every 7 days (for weekly export) or 29 days (for monthly export).
 - Export data automatically at weekly or monthly intervals.
- **Data Loader**, a client application that you must install separately.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

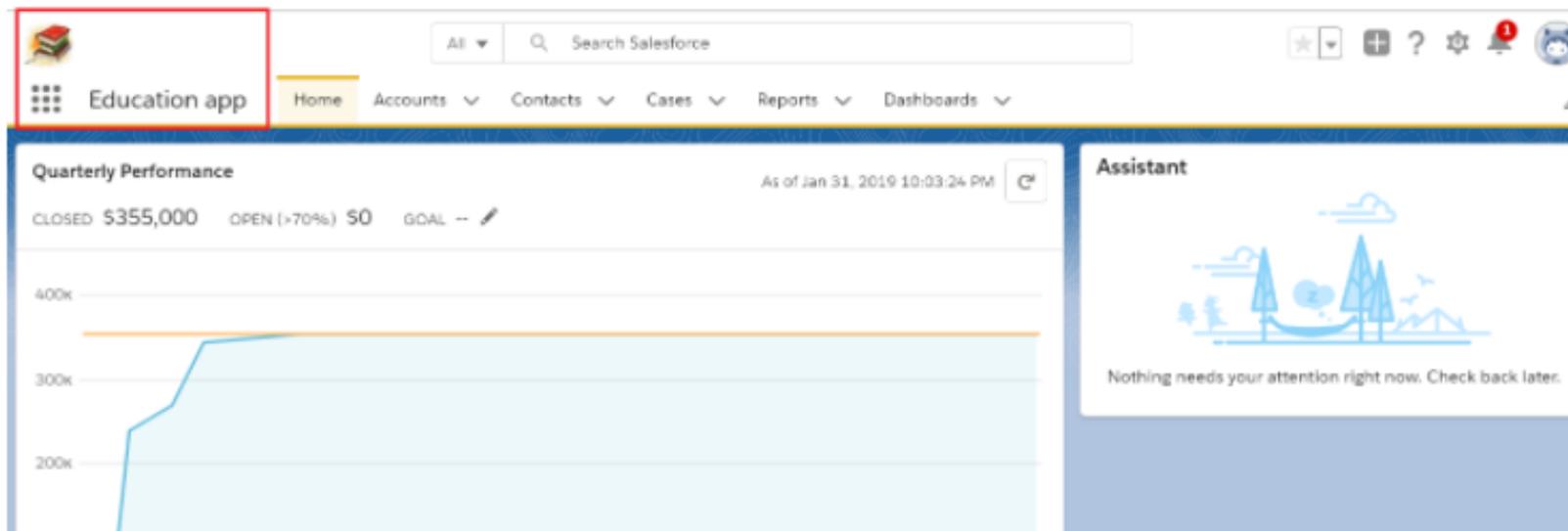
CUSTOMIZATION

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.

The screenshot shows the Salesforce interface for the Accounts list view. The top navigation bar includes tabs for Sales, Home, Chatter, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, and Energy A. The Accounts tab is active, showing a list of 17 items. The list view is currently set to 'All Accounts'. The table columns are Account Name, Account Site, Billing State/Province, and Phone. The table contains three rows of data:

	Account Name ↑	Account Site	Billing State/Province	Phone
1	Acme Corporation			
2	Antonio.Iavarone			024540
3	Burlington Textiles Corp of America		NC	(336) 222-7000

Callout boxes provide instructions on how to customize the view:

- Click the arrow to view the different list views and choose one by clicking on it.** (Points to the 'All Accounts' dropdown menu)
- Click the icon to Select Fields to Display in the Table.** (Points to the gear icon in the toolbar)
- Click the icon to choose between Table, Kanban and Split view.** (Points to the view toggle icons in the toolbar)
- Click the icon to create a List View Chart.** (Points to the chart icon in the toolbar)

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.

Users can see the most important Contact information, where they need it at the top of the record page.

The screenshot shows the Salesforce Lightning Experience navigation bar with the 'Contacts' tab selected. Below the navigation bar, a compact layout for a Contact record is displayed. The record details are highlighted with an orange box. The record information is as follows:

Title	Birthdate	Email	Phone (2)
CEO	01/05/1960	amanda.smith@test.it	3333333333

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.

Fields: Add, remove, and move; make Read Only or required.

Related Lists: Add, remove, and move, change columns, sort records.

Sections: Create and move.

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.

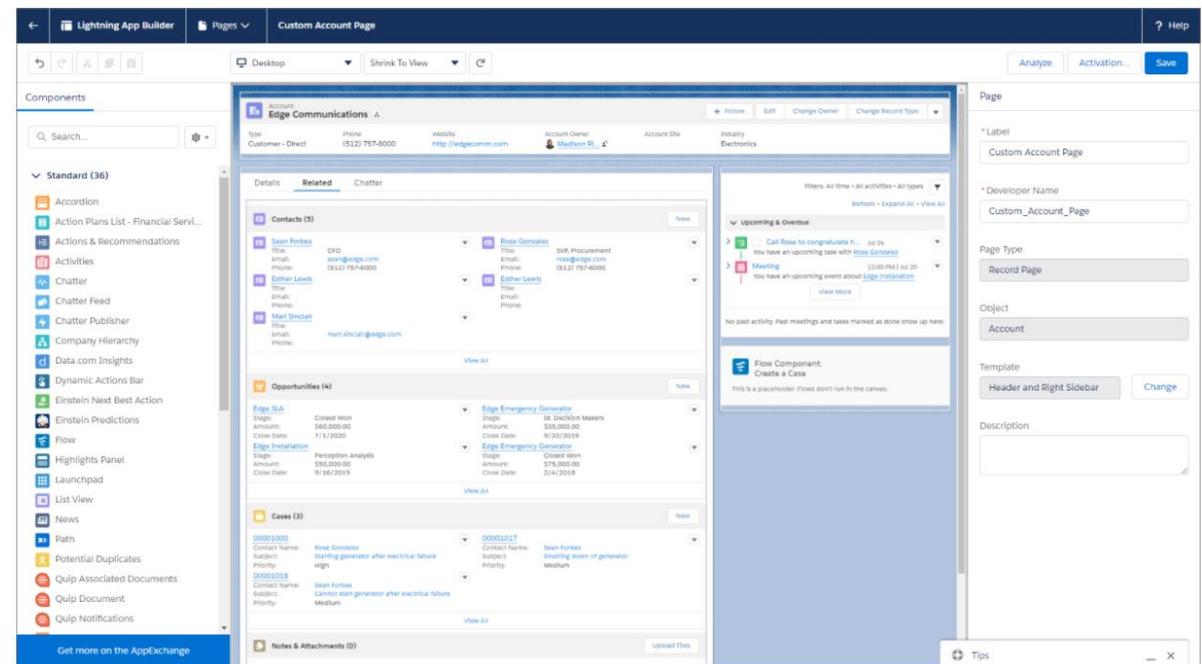
When you edit a Lightning app from the App Manager in **Setup**, you're brought into the *Lightning App Builder* to manage the app's settings. You can update the app's branding, navigation, app options, and manage the Lightning pages assigned to that app all inside the Lightning App Builder.

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**.



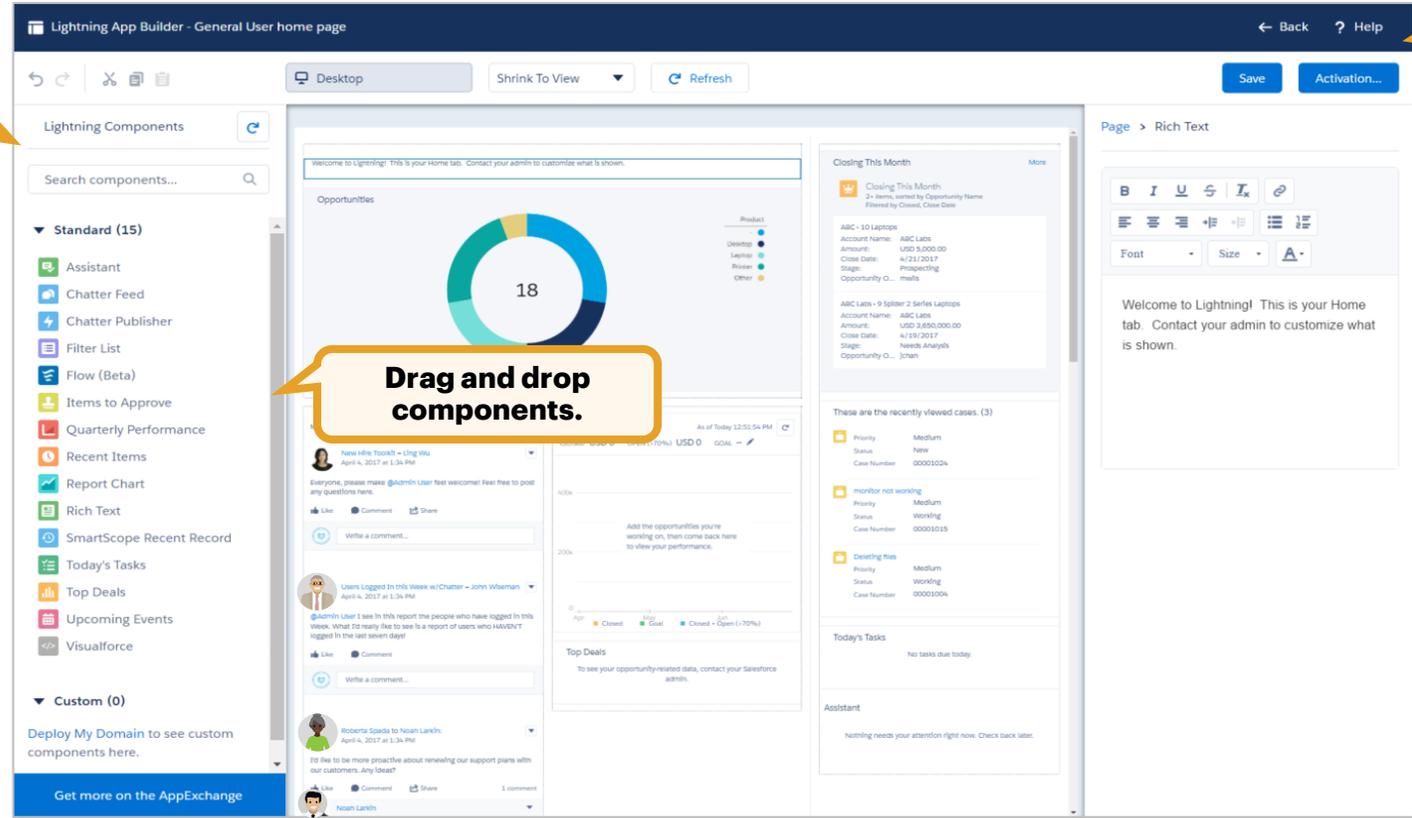
CUSTOMIZATION LIGHTNING APP BUILDER



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

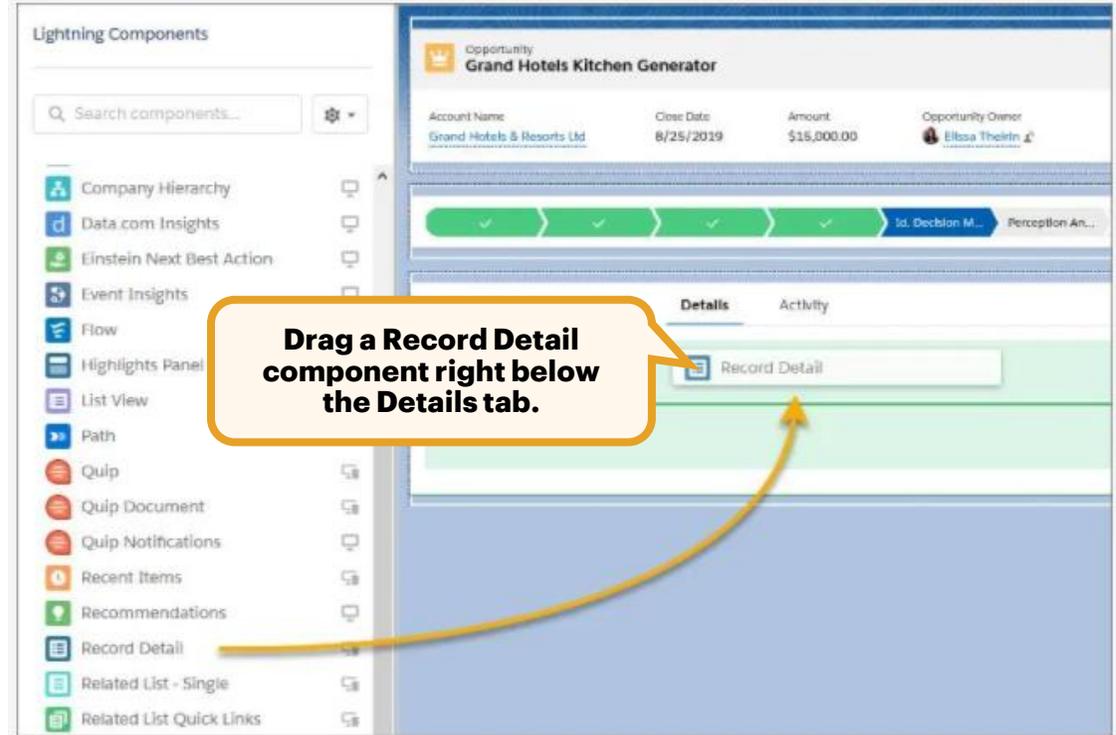
Record Page is used to build custom lightning record pages containing the components with related records based on the user requirement. Custom record pages are supported in Lightning Experience and in the Salesforce mobile app.

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.

The screenshot displays the Lightning App Builder interface for a custom app page. The top navigation bar includes 'Lightning App Builder', 'Pages', and 'Custom App page'. Below the navigation bar, there are controls for 'Desktop' view, 'Shrink To View', and 'Refresh'. A 'Components' sidebar on the left lists various standard components like 'Campaign Marketplace', 'Chatter Feed', 'Dashboard', and 'Quip Associated Documents'. The main workspace shows a preview of the app page with a table of accounts, a search bar, and a 'Quip Associated Documents' component. A callout box with a yellow border and black text points to the 'Quip Associated Documents' component, stating: 'Drag and drop the components we want to display'. The bottom of the interface features a 'Get more on the AppExchange' button and a 'Tips' section.

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HANDS – ON CHALLENGE

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.

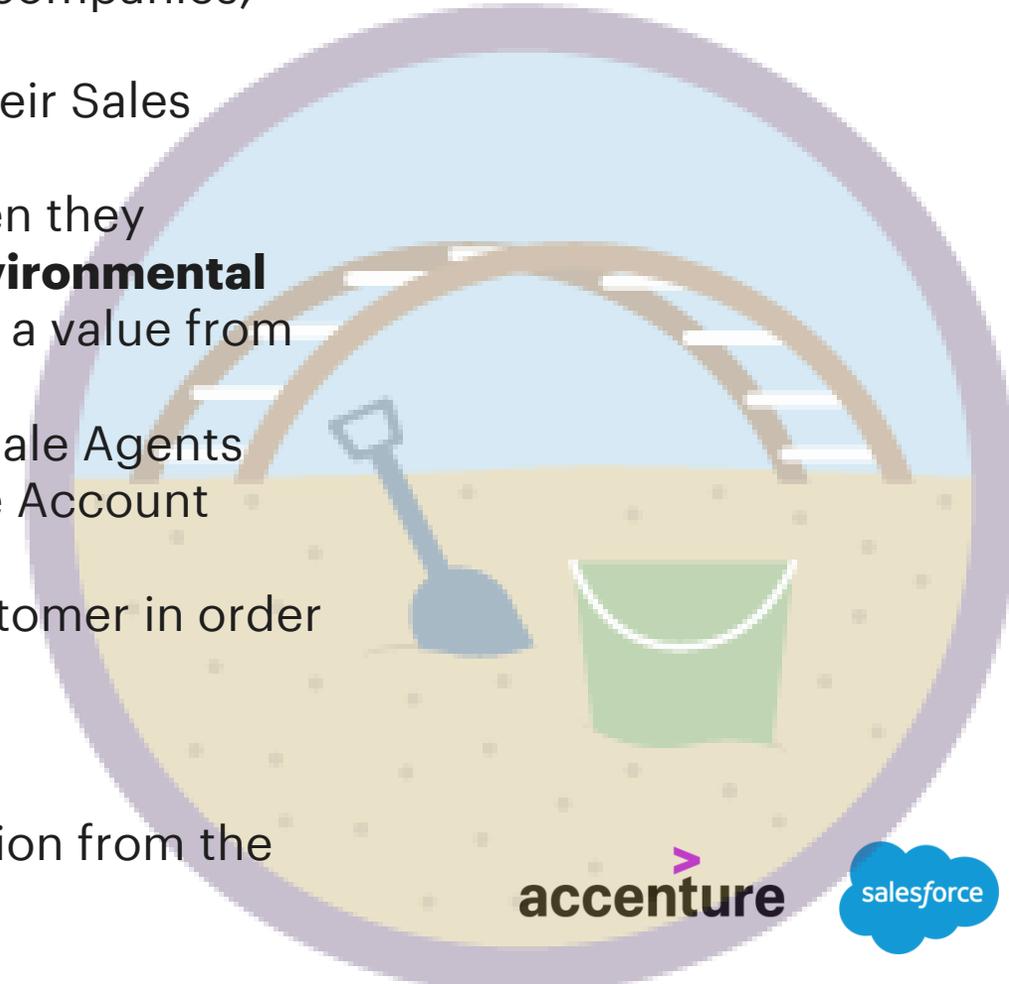
The Sales Agents needs **to track a new information** when they register a new potential customer in Salesforce: **the environmental sustainability rank**. In particular, the Sale Agents select a value from the following: Low, Medium, High.

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.



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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

