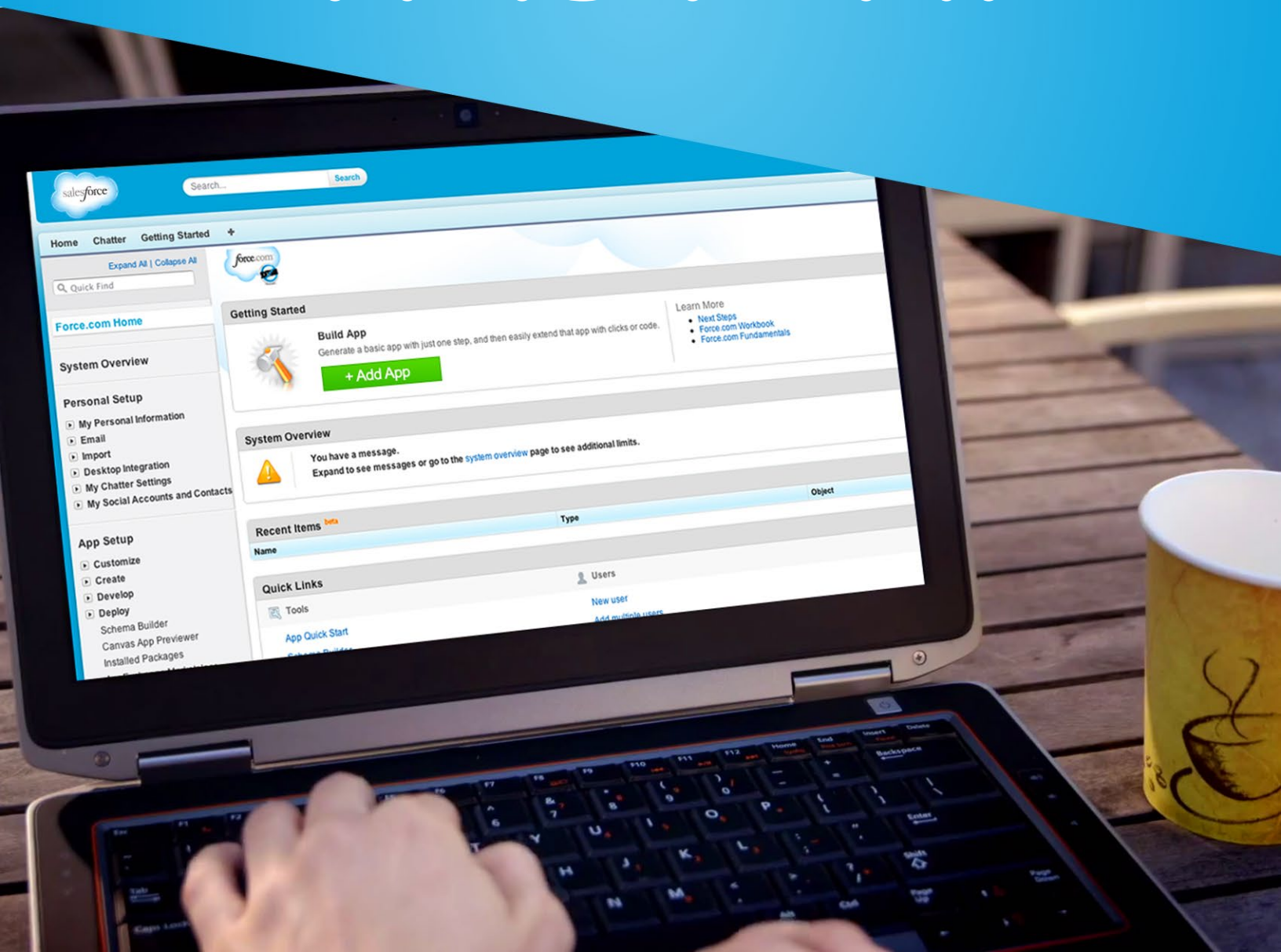
salesforce

A QUICK PEEK AT HOW SALESFORCE HELPS YOU BUILD APPS, FASTER.



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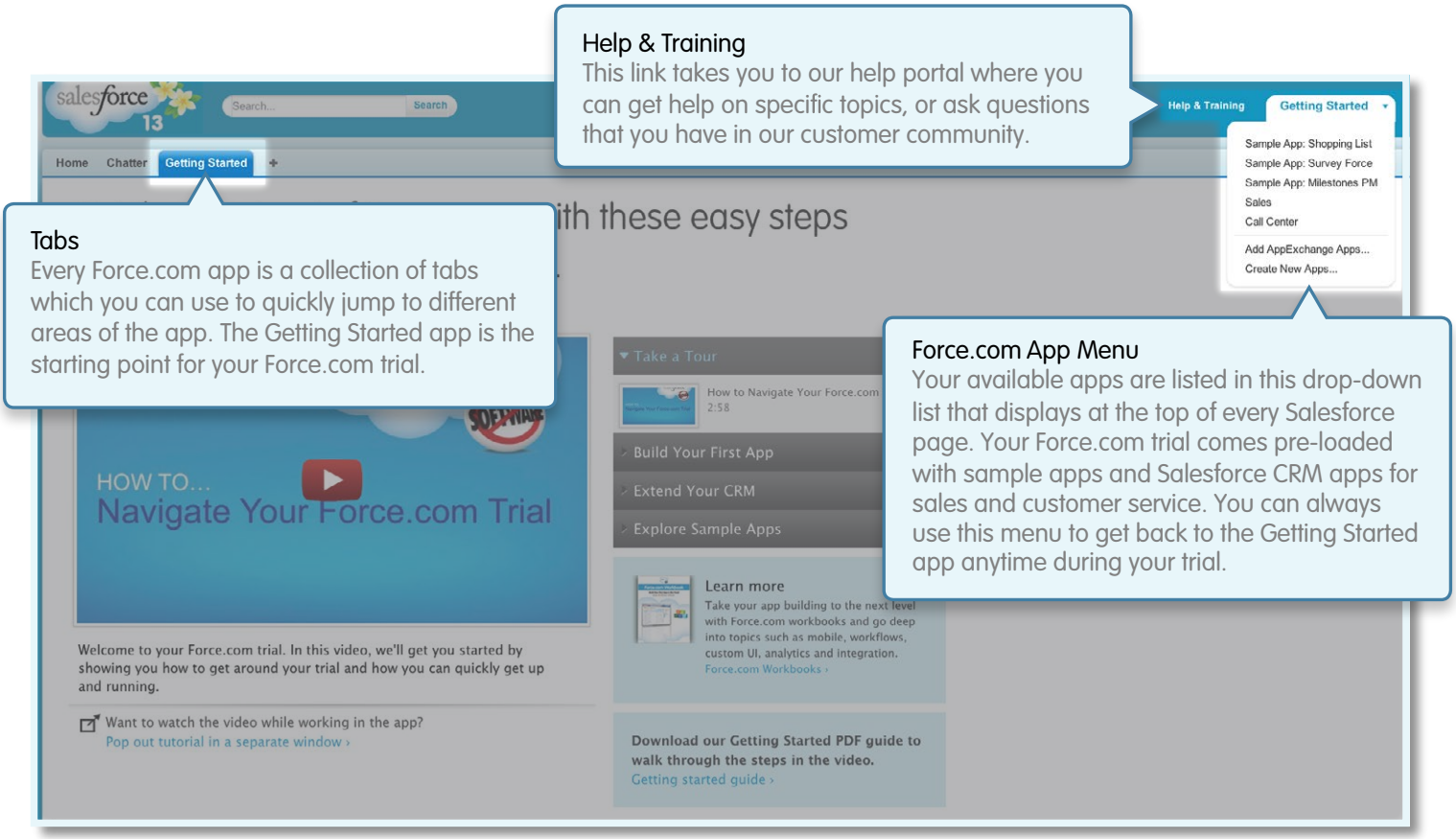
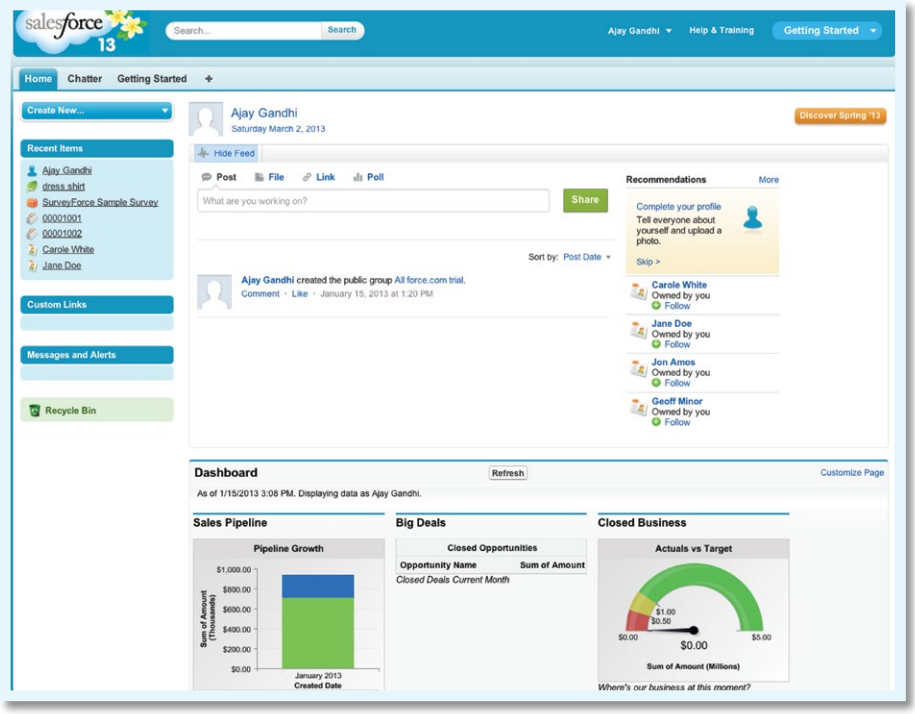
The fastest path from idea to app starts with Force.com on the Salesforce Platform. Trusted by over 100,000 customers, the Salesforce Platform brings together services like Force.com, Heroku, Database.com and Site.com. And this quick peek at Force.com on the Salesforce Platform is just the start of turning ideas into business apps that give you competitive advantages.

To get started, read on.

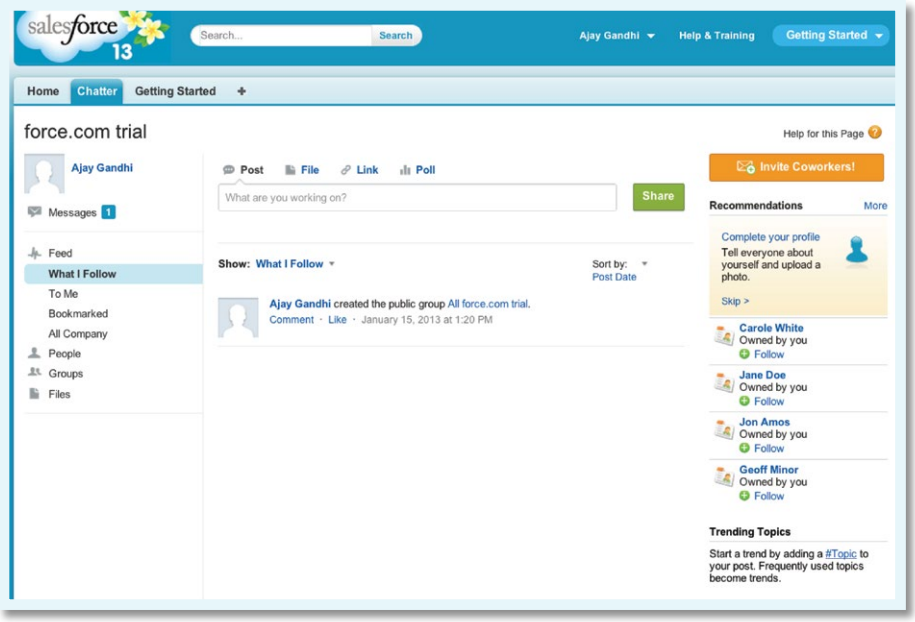
NAVIGATING YOUR FORCE.COM TRIAL

Getting Started tab. Here you'll find videos and text tutorials to walk you through a few steps to get up and running with your trial.



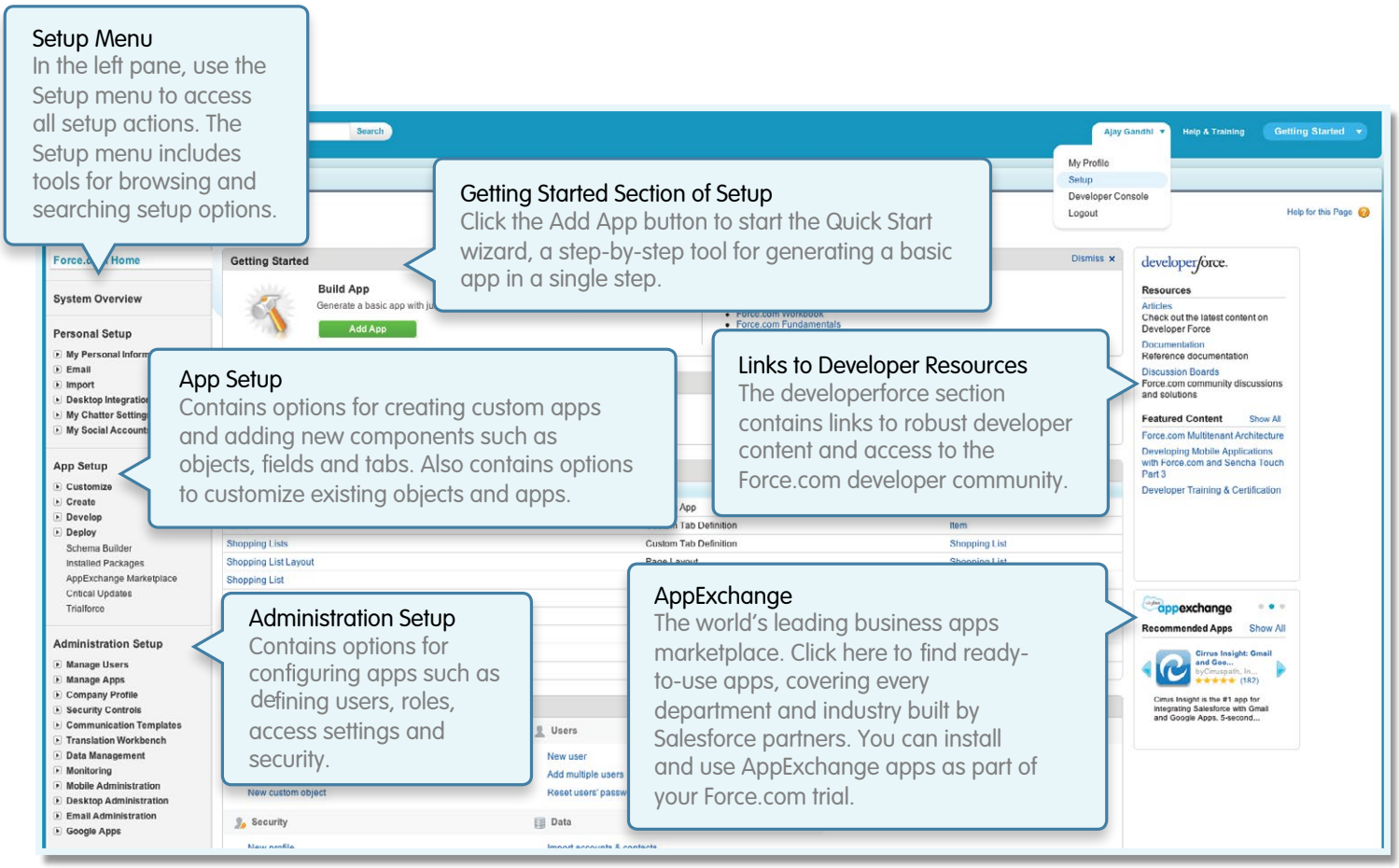


Home tab. The home tab is a typical starting point for most Force.com apps. The home tab contains standard components such as your Chatter feed, Recent Items and Messages & Alerts and any custom components that you create such as logos and dashboards. It can be customized based on the user experience you want for your app.



Chatter tab. Chatter is a secure collaboration platform built into Force.com that lets you make any app that you build instantly social. With Chatter, your Force.com apps can enable workers to collaborate on any data object defined in your app.

Force.com Setup page. The Force.com Setup page contains options for building and managing apps. To access, click **Your Name | Setup**.

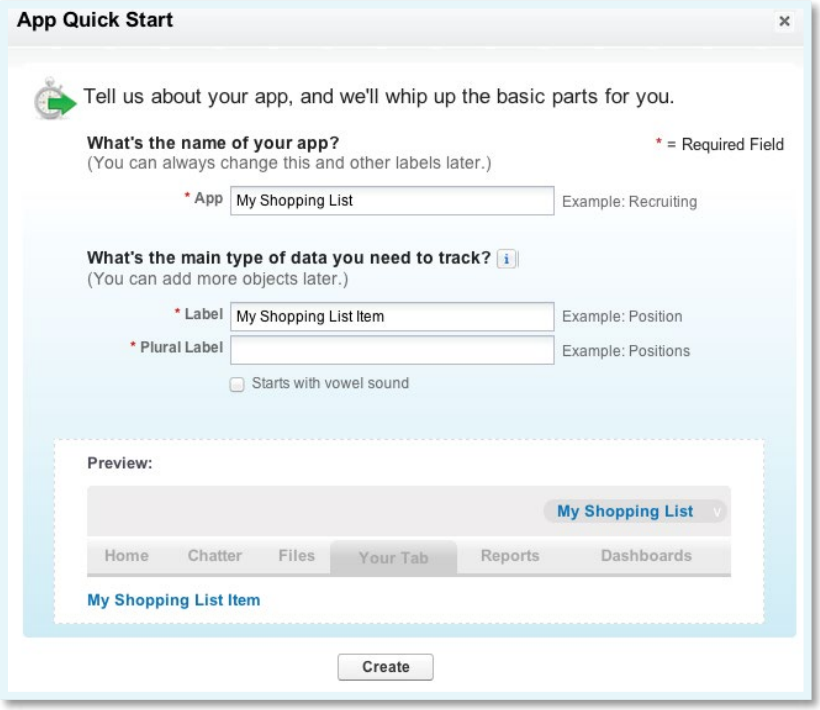


BUILDING YOUR FIRST FORCE.COM APP

It's easy to get started with Force.com because it's a cloud platform: no servers to configure, no software to install. Once you've logged into Force.com, it's really simple to build your first app in minutes using the Force.com Quick Start wizard. Try it out by building a basic app for managing your shopping list for the week.

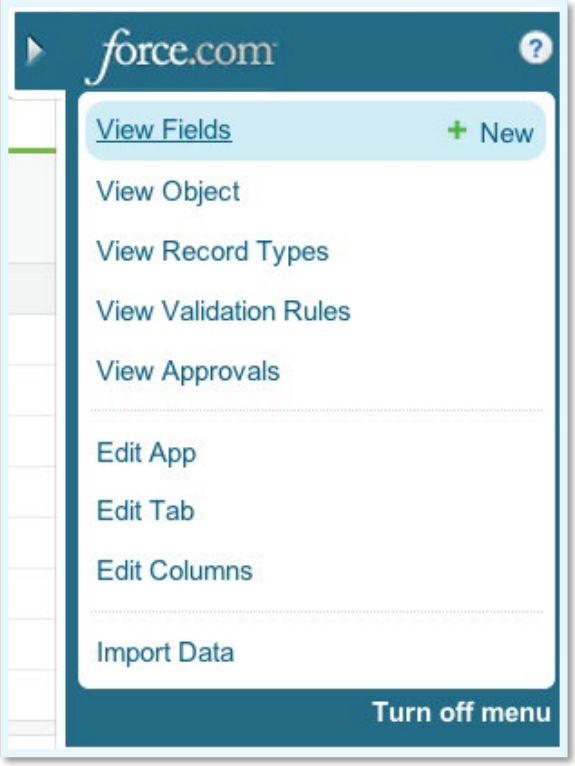
Create A Simple App

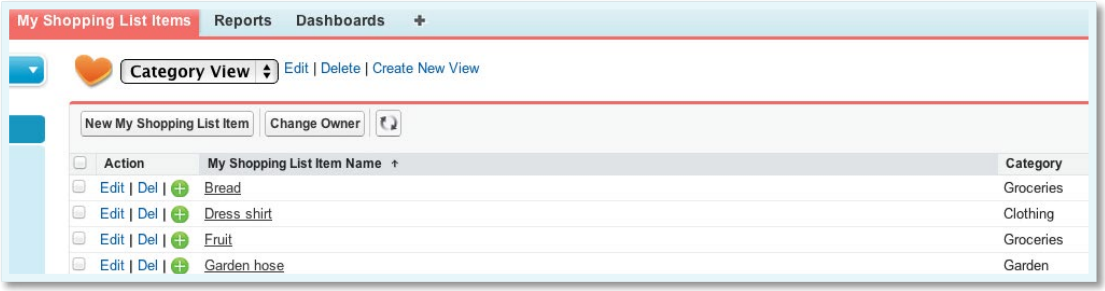
1. Go to the Force.com Setup page by clicking **Your Name | Setup**
2. Click the big **Add App** button in the **Getting Started** section to start the wizard.
3. Fill in the form as follows, then click **Create**.
   - **App:** My Shopping List
   - **Label:** My Shopping List Item
   - **Plural Label:** My Shopping List Items
4. Now, you've created a new Force.com app called **My Shopping List** that tracks your shopping list items.
5. Click **Go To My App**
6. Take a tour of your app. Click **Start Tour** and follow along.
7. Your **Shopping List** app has been added to the Force.com app menu and also has its own tab where you can add new shopping list items.
8. Try out your app: add a few shopping list items such as bread, fruit, dress shirt, garden hose.



Enhance Your App

1. Let's add a custom field to your app called **Category** to organize your Shopping List Items.
2. From the **Force.com Quick Access Menu** (the tab that pops out from the right side of the window), hover your mouse over **View Fields** and click **+New**.
3. Select **Picklist**, then click **Next**.
4. For the new field's **Field Label**, enter Category.
5. For the new field's picklist, enter the following on separate lines:
   - Groceries
   - Clothing
   - Garden
6. Click **Next**, then **Next**, then **Save**.
7. Click the **My Shopping List** Items tab. Click one of your items. Notice that the new **Category** field is on your item's page layout. Double-click the **Category** field and pick a category, then click **Save**. Repeat for all the items in your list.



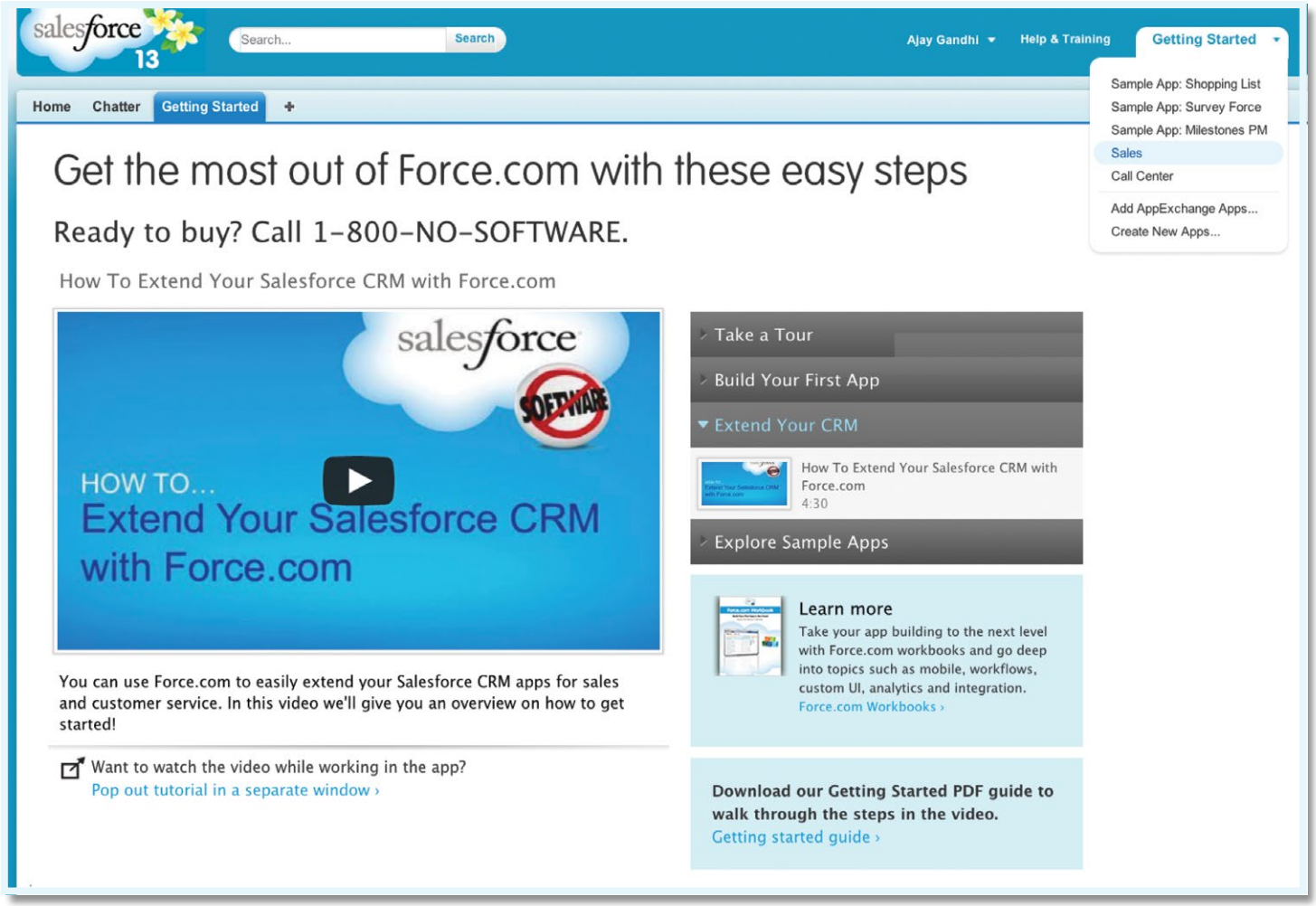


View Your App

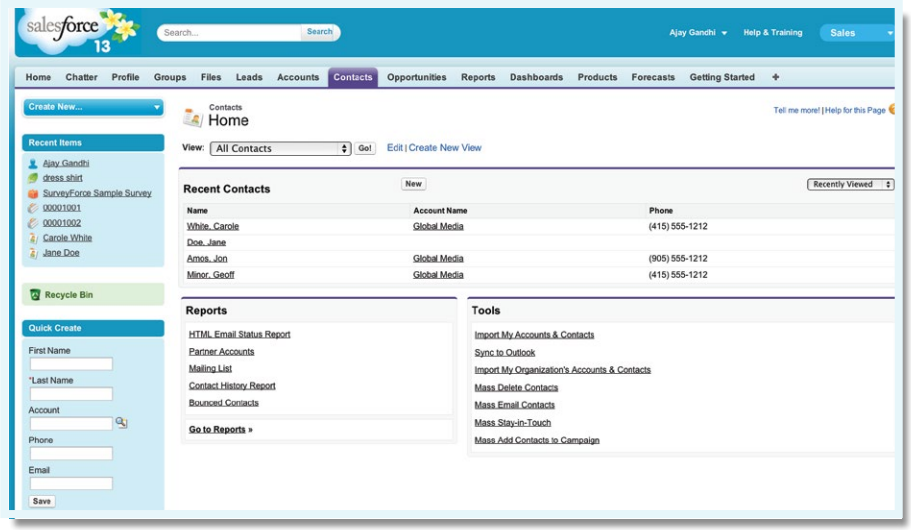
1. We can also create a new **View** under the Shopping List Items tab so we can see the items and their categories at the same time.
2. Click **Create New View** and name it. Under the **Select Fields to Display** section, select the **Category** field to the right hand side. Click **Save**.
3. Nice job, and not a single line of code!

EXTENDING YOUR SALESFORCE CRM WITH FORCE.COM

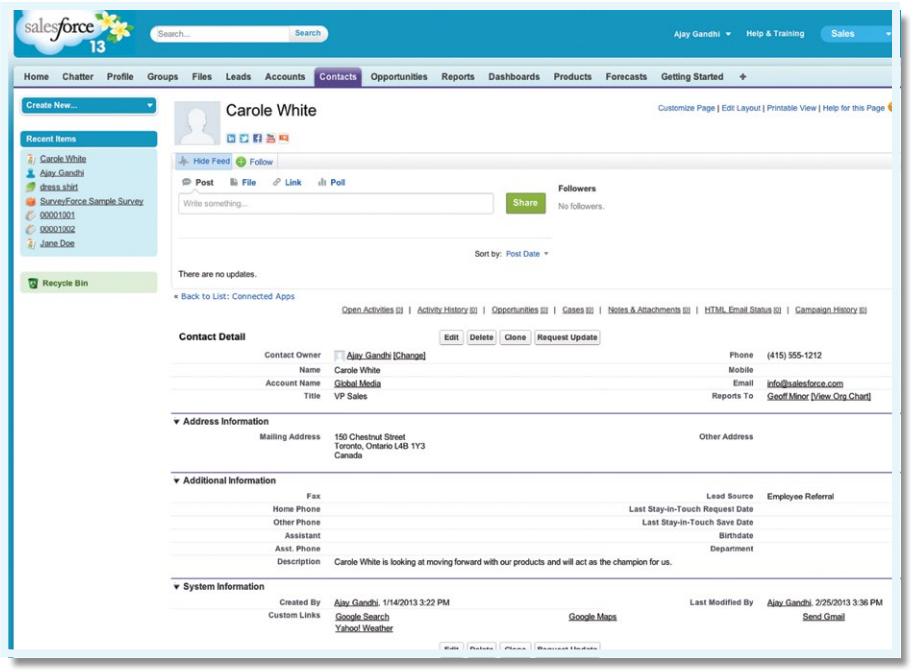
Your Force.com trial comes with sample custom apps and Salesforce CRM apps for Sales Cloud and Service Cloud, labeled as Sales and Call Center in the Force.com app menu. Salesforce makes it easy to extend your existing Sales Cloud or Service Cloud with Force.com, since both these CRM apps are built on Force.com.



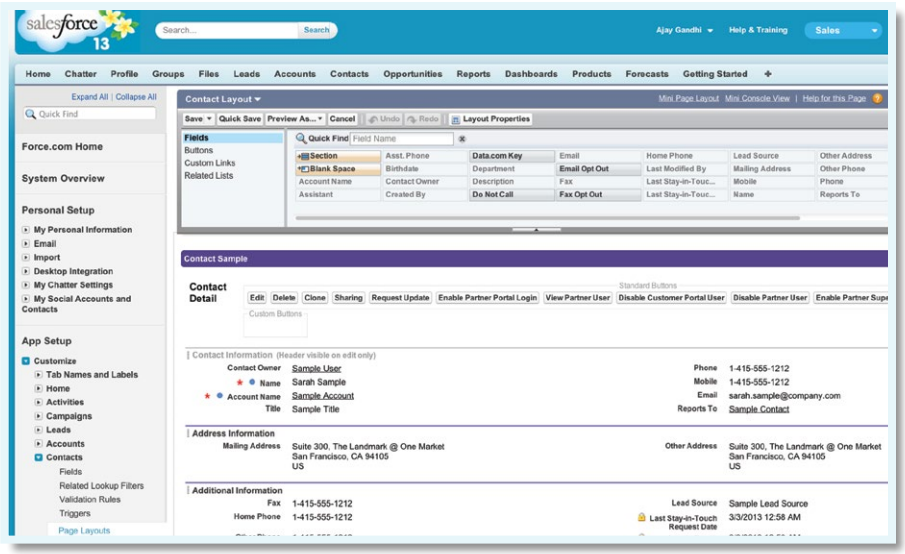
This tutorial walks you through an example of how the Sales app can be extended using Force.com by customizing the page layout of contact records. Contacts are standard objects in Sales Cloud.



Sales App. The Sales app has many different tabs including Accounts, Contacts and Opportunities. We can extend the Sales app in many different ways such as adding new custom tabs, new objects, new fields or new dashboards.

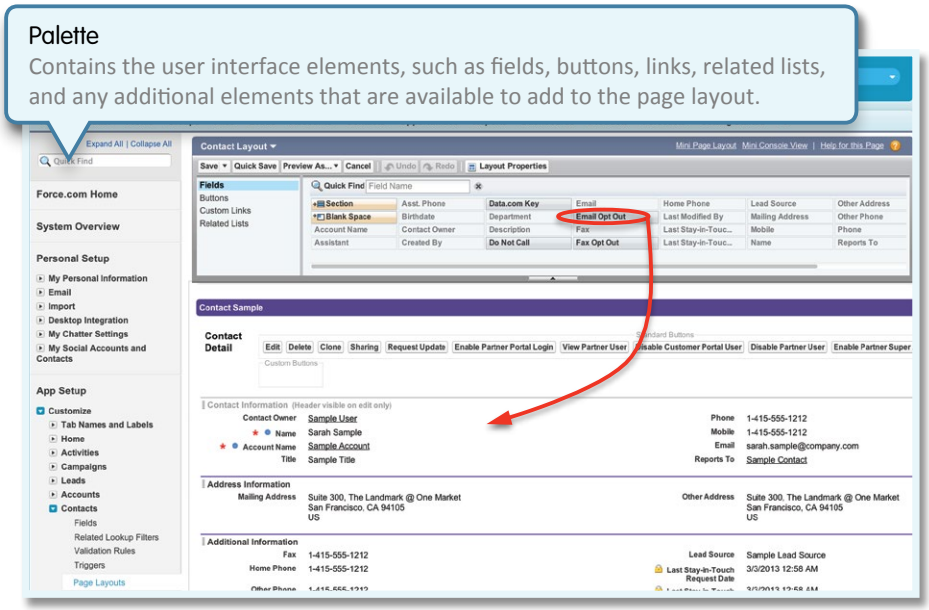


Contacts. The Contacts tab is where you can track all of the contacts you have at companies you do business with. When you click into a contact you can see all the contact information that you have for that individual based on the defined page layout. Let's walk through an example of extending the Contact object.



We'll customize the Contacts object by adding an existing field to the page layout view for contact record details.

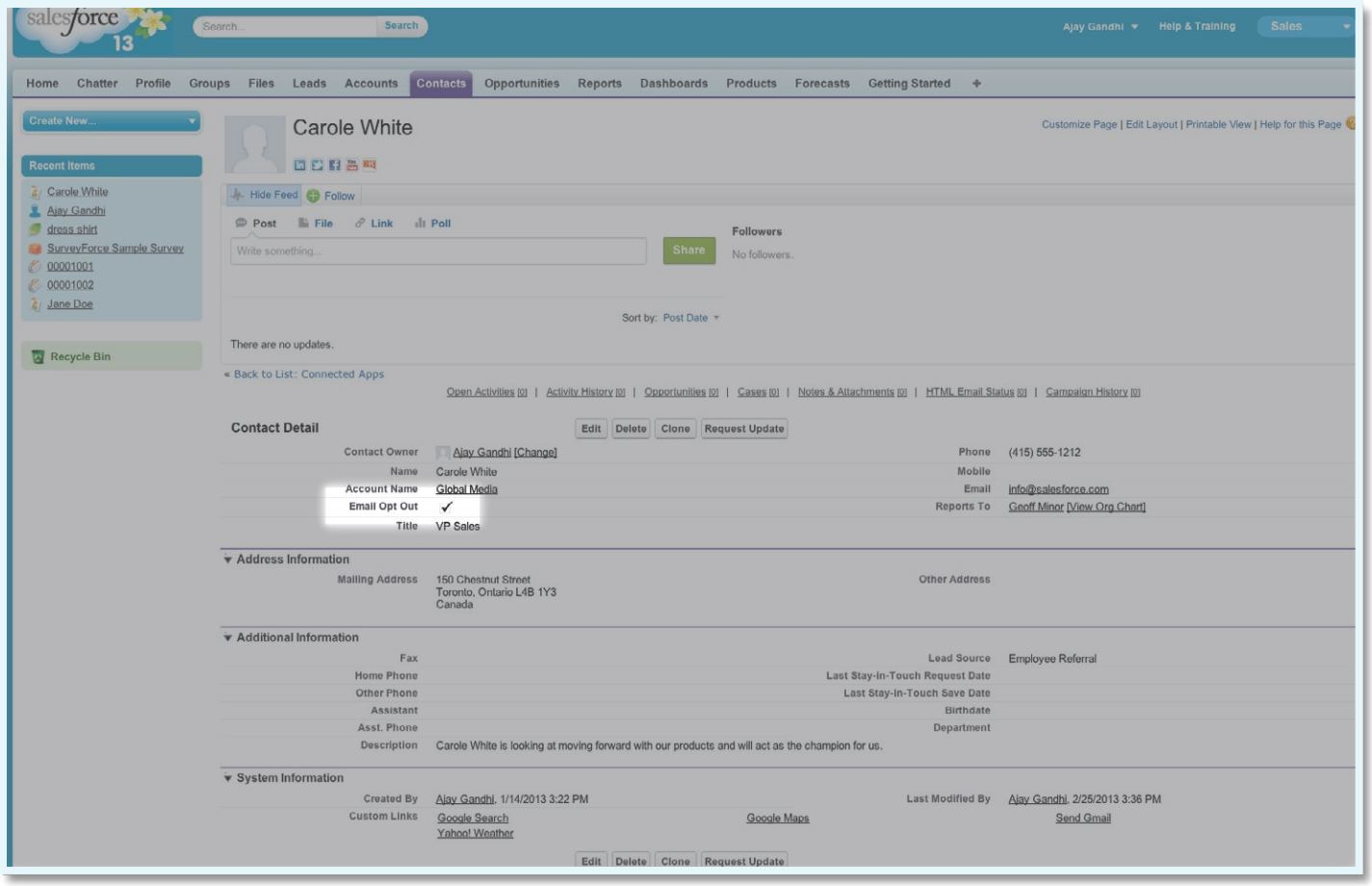
Go to **Your Name | Setup** and then **App Setup | Customize | Contacts | Page Layout**. And then click **Edit** for the Contact Layout.



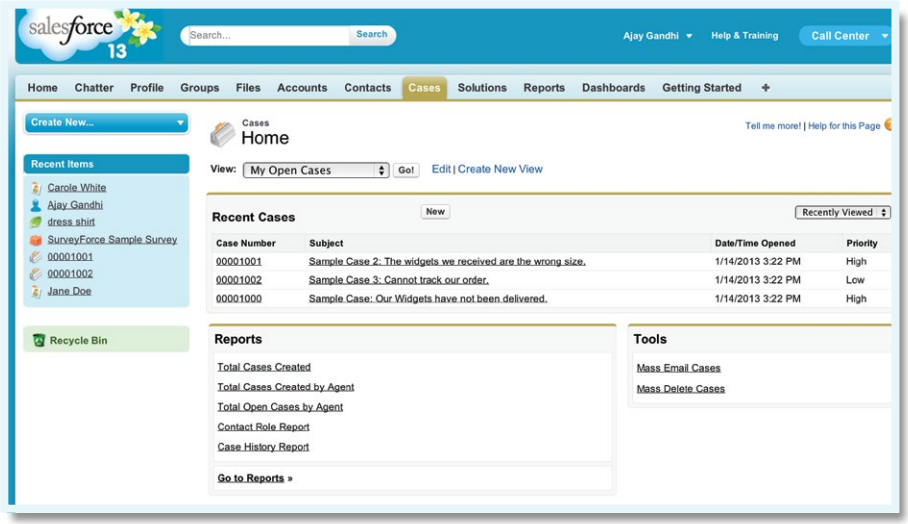
The page layout editor consists of two parts: a palette on the upper portion of the screen and the page layout on the lower portion. If you want to get help on how to customize pages using the page layout editor, click on **Help for this Page** (look for the ?)!

From the palette, drag and drop the existing field called **Email Opt Out** to the **Contact Information** section of the page layout. Click **Save** in the top left of the palette.

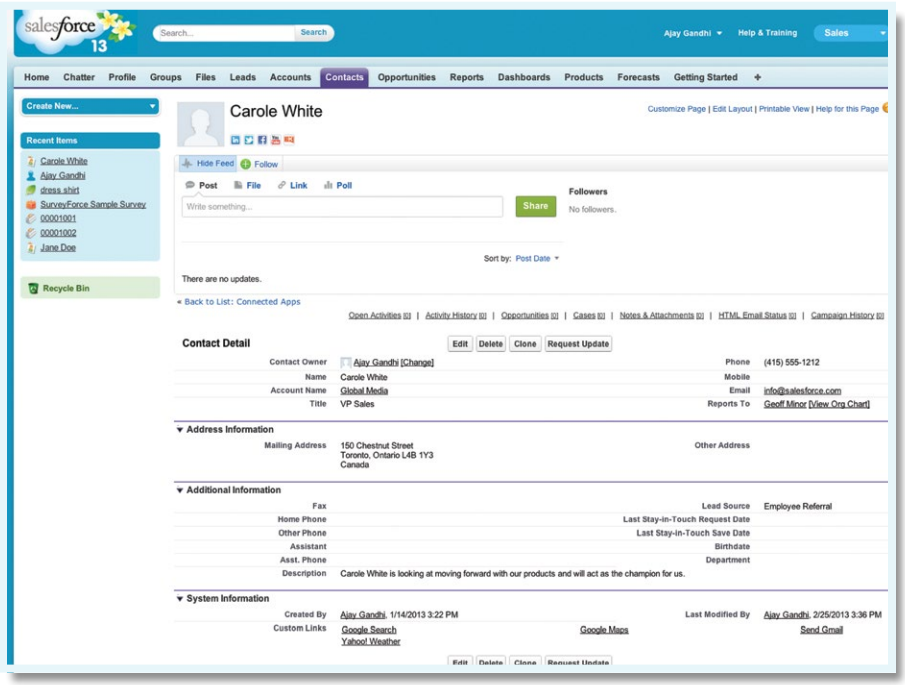
Go back to the Sales app, click on the **Contacts** tab and select a contact. The existing field called **Email Opt Out** is now added to the default page layout of all of my Contact records, enhancing the information I can see for each contact in Sales Cloud. Remember, if you already have Sales Cloud, then you already have Force.com too, since Sales Cloud is built on Force.com. This means that you can extend your existing Sales Cloud right from within your existing Salesforce org, where all your customer data already exists!



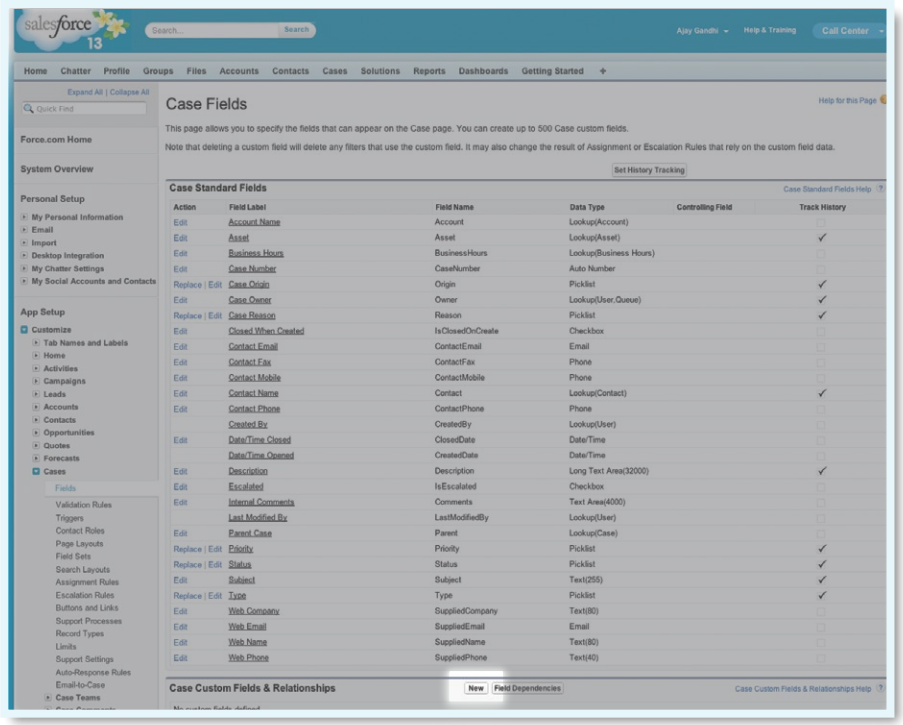
By using the Setup menu that is part of Force.com, you can create custom fields to track new information that doesn't already exist in your Salesforce CRM app. This tutorial walks you through an example of how the Call Center app can be extended using Force.com by adding a custom field to the existing Case object. Cases are standard objects in Service Cloud.



Call Center App. The Call Center app has many different tabs including Cases, Solutions and Reports. We can extend the Call Center app in many different ways such as adding new custom tabs, new objects, new fields or new dashboards.

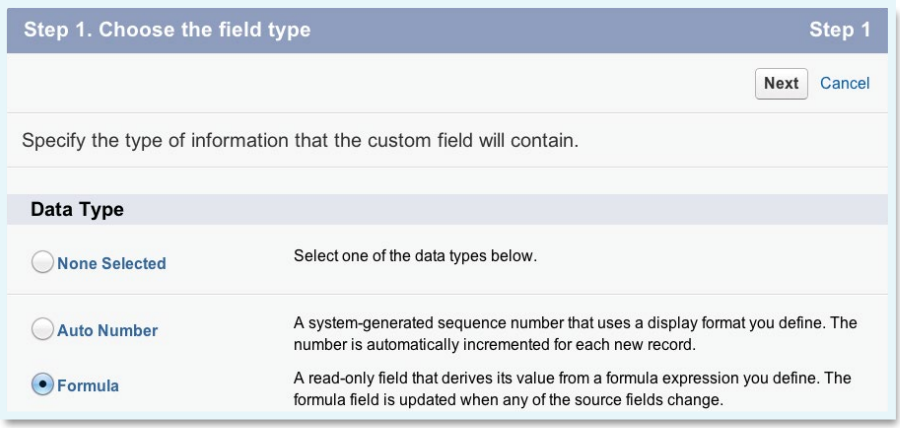


Cases. The Cases tab is where your agents will find the cases or customer service issues they need to work on. Let's walk through an example of extending the Case object.



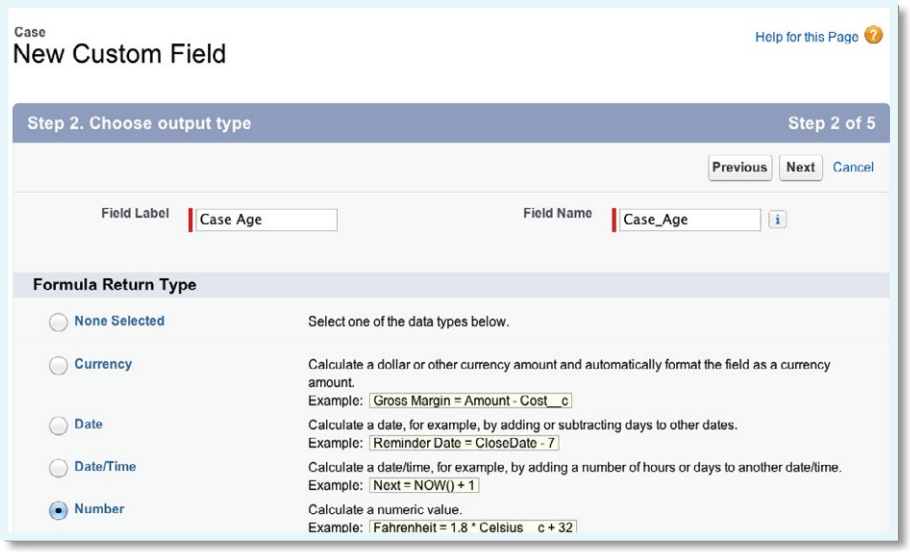
To add a custom field to a Case.

Go to **Your Name | Setup** and then **App Setup | Customize | Cases | Fields**. And then click **New** in the section for **Case Custom Fields & Relationships.**



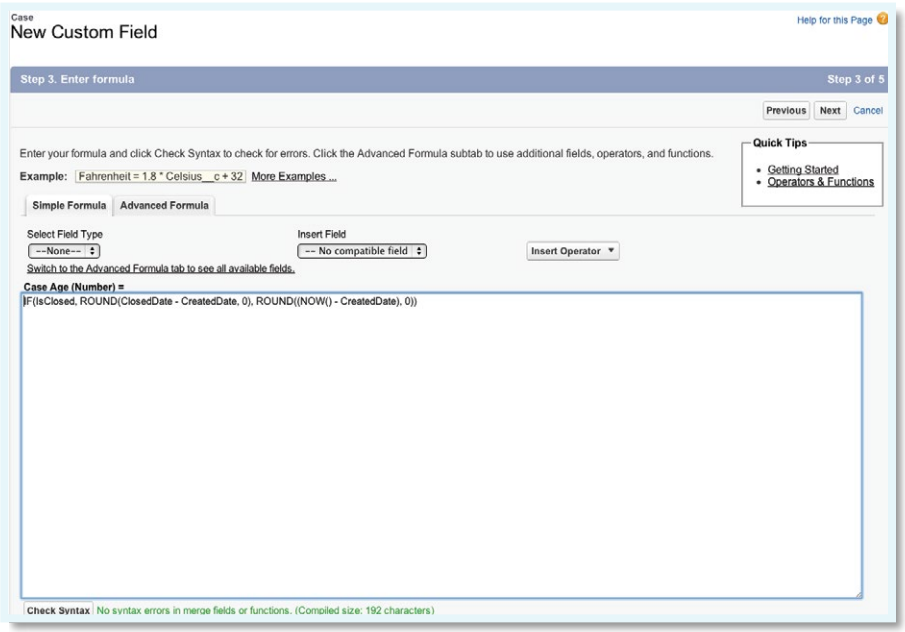
Select **Formula** for the Data Type. Click **Next**.

In this example, we will add a custom field called Case Age and use a formula to calculate how many days the case has been open.



Enter Case Age for the **Field Label** and select **Number** for the formula return type. Click **Next**.

In this example, we will add a custom field called Case Age and use a formula to calculate how many days the case has been open.

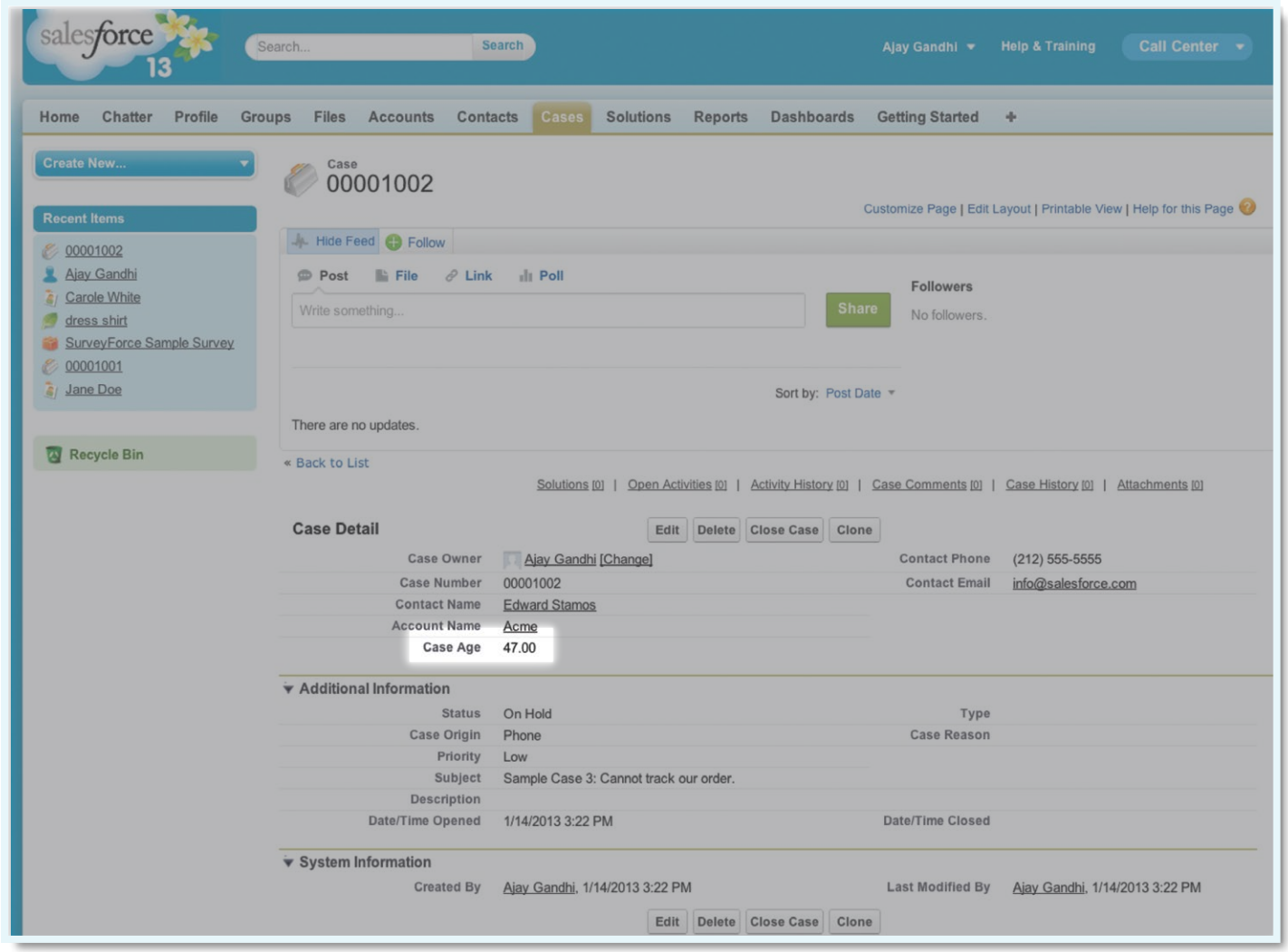


Enter the formula: IF(IsClosed, ROUND(ClosedDate - CreatedDate, 0), ROUND((NOW() - CreatedDate), 0)).

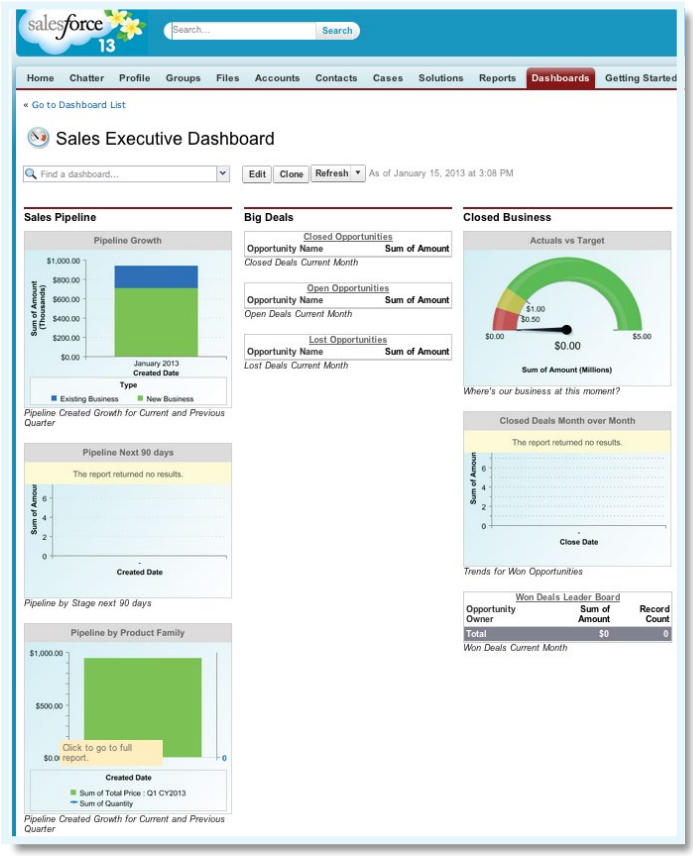
Click **Check Syntax** to make sure the formula is correctly entered.

Click **Next**, **Next** and **Save**.

Go back to the Call Center app, click on the **Cases** tab and select a case. The **Case Age** field now appears in the Case record detail. Remember, if you already have Service Cloud, then you already have Force.com too, since Service Cloud is built on Force.com. Now that you have the hang of it, you can go to your existing Salesforce org, where all your customer data already exists, and add all the custom fields that you need for your business!

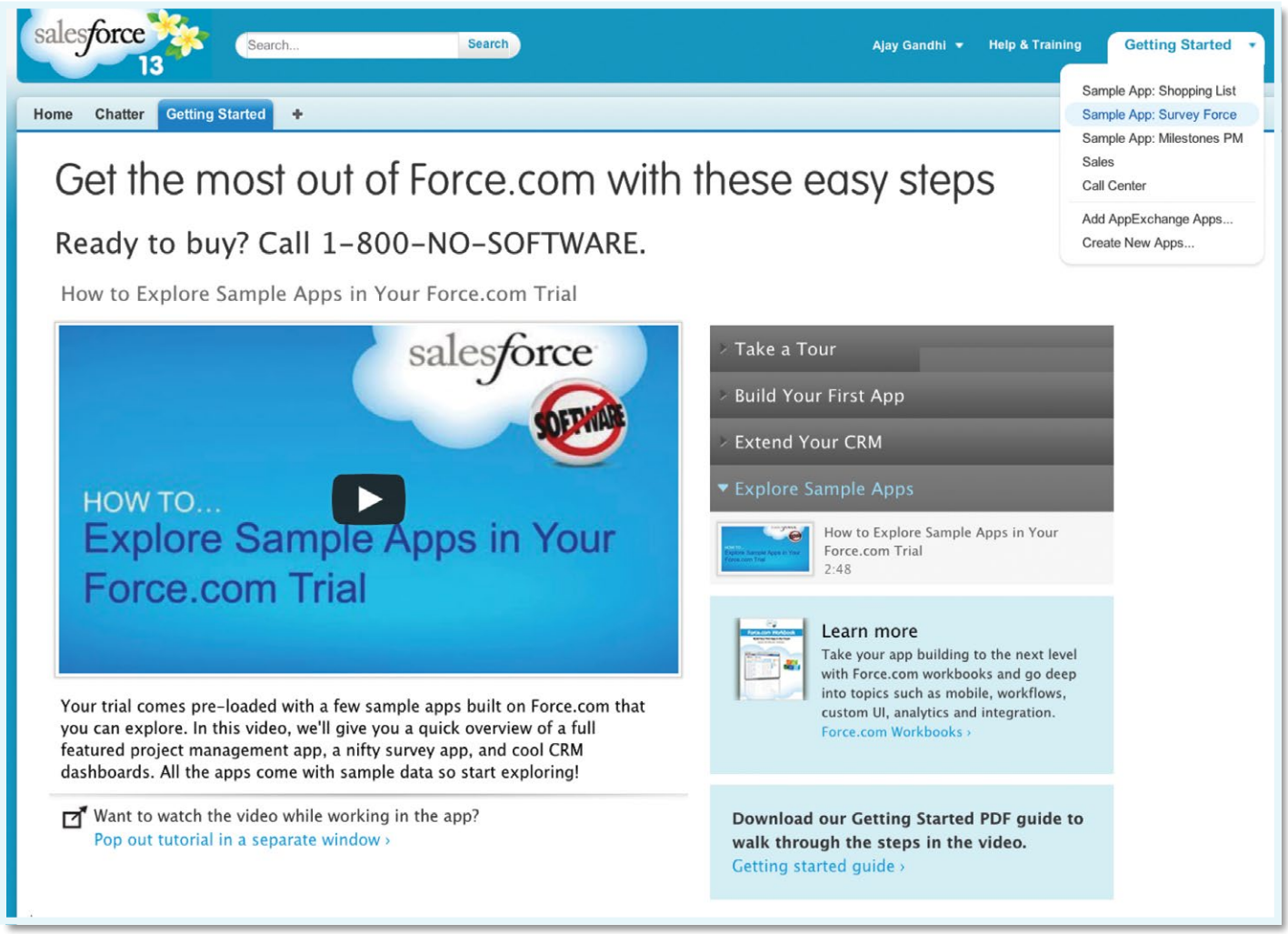


You can also extend your Salesforce CRM apps with dashboards that report on your sales and service data. Force.com comes with built-in analytics and reporting capabilities that you can use to create comprehensive CRM dashboards so that your sales and service teams can stay on top of every deal or case. The Force.com trial comes with several sample CRM dashboards for Sales Executives, Customer Service Agent Supervisors and Service KPIs.

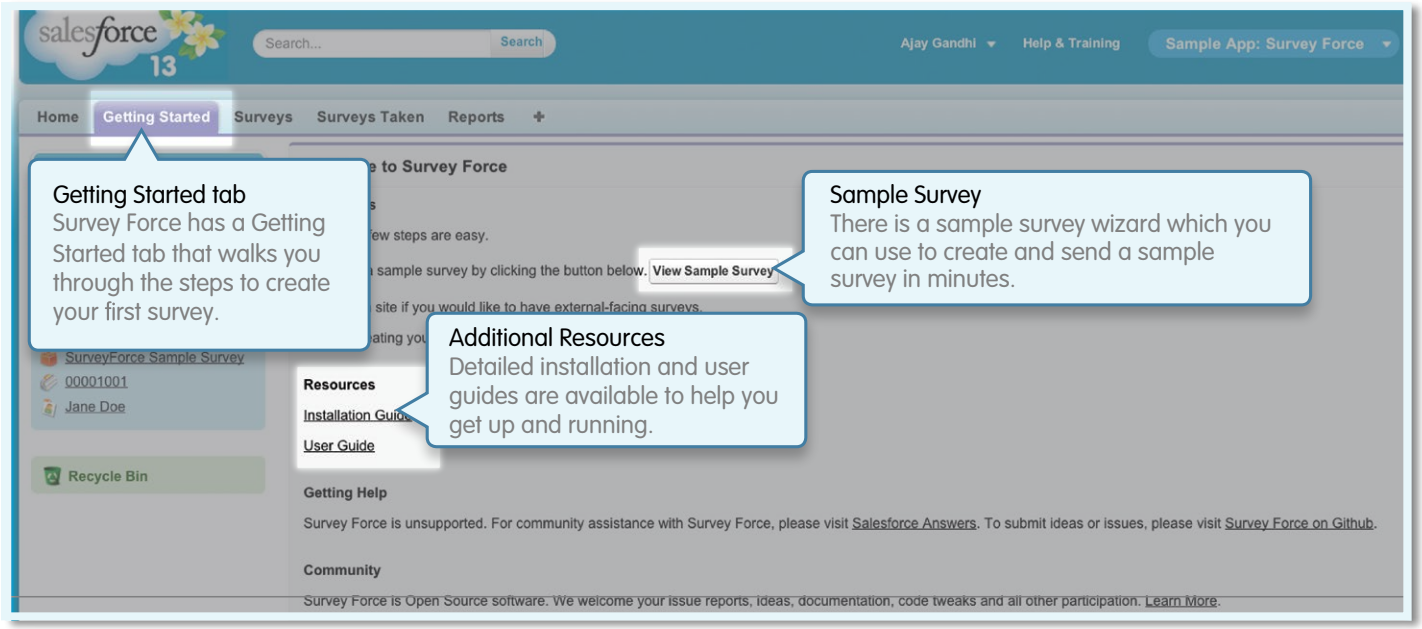


EXPLORING SAMPLE APPS IN YOUR FORCE.COM TRIAL

Your Force.com trial comes pre-loaded with sample apps which are accessible from the Force.com app menu. In addition to the basic Shopping List app example, there are sample apps for surveys (Survey Force) and project management (Milestones PM) as well as best practice CRM dashboard examples – all the sample apps are native Force.com apps.

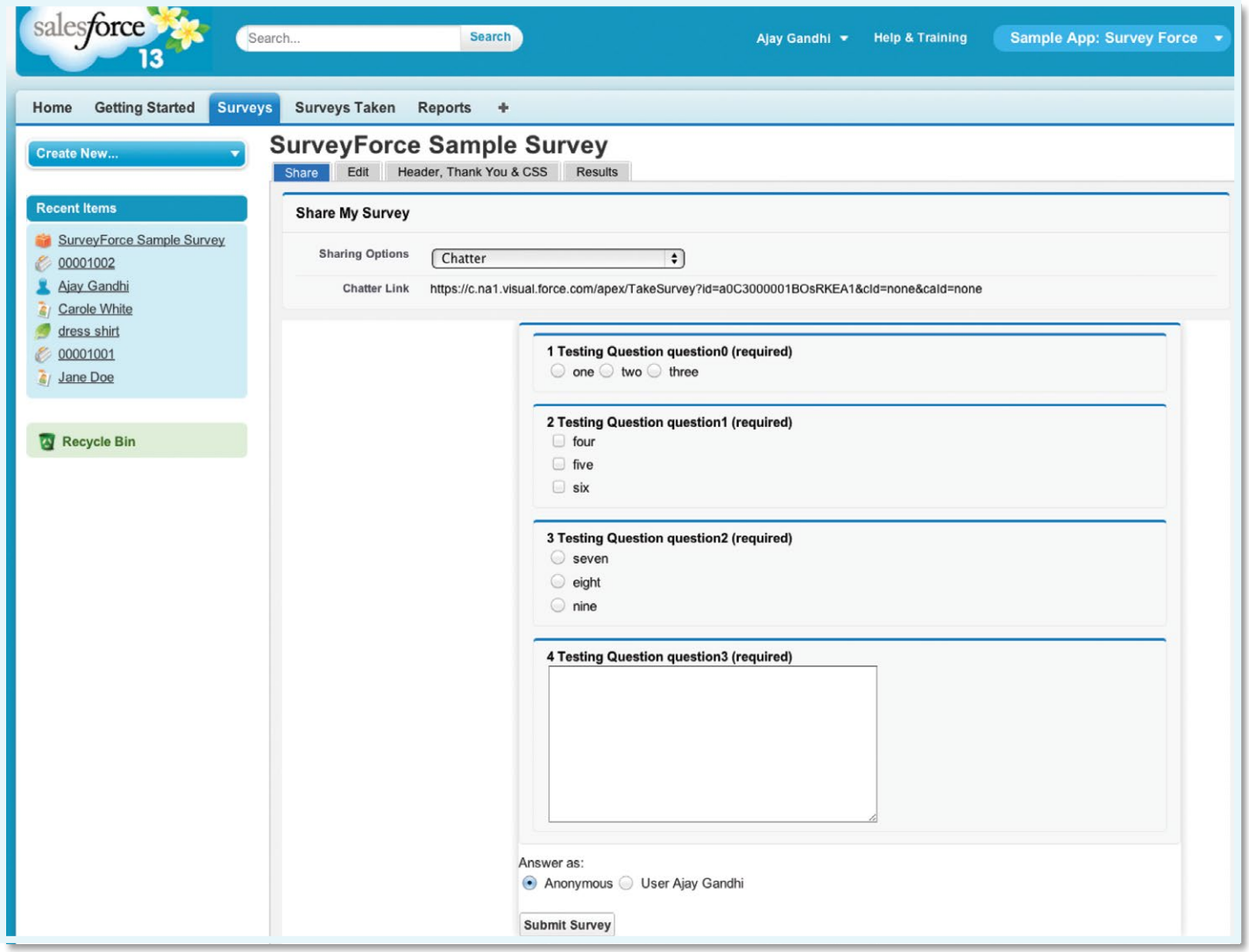


Survey Force. The Survey Force sample app can be used to create, send and capture customer feedback natively in salesforce.com.

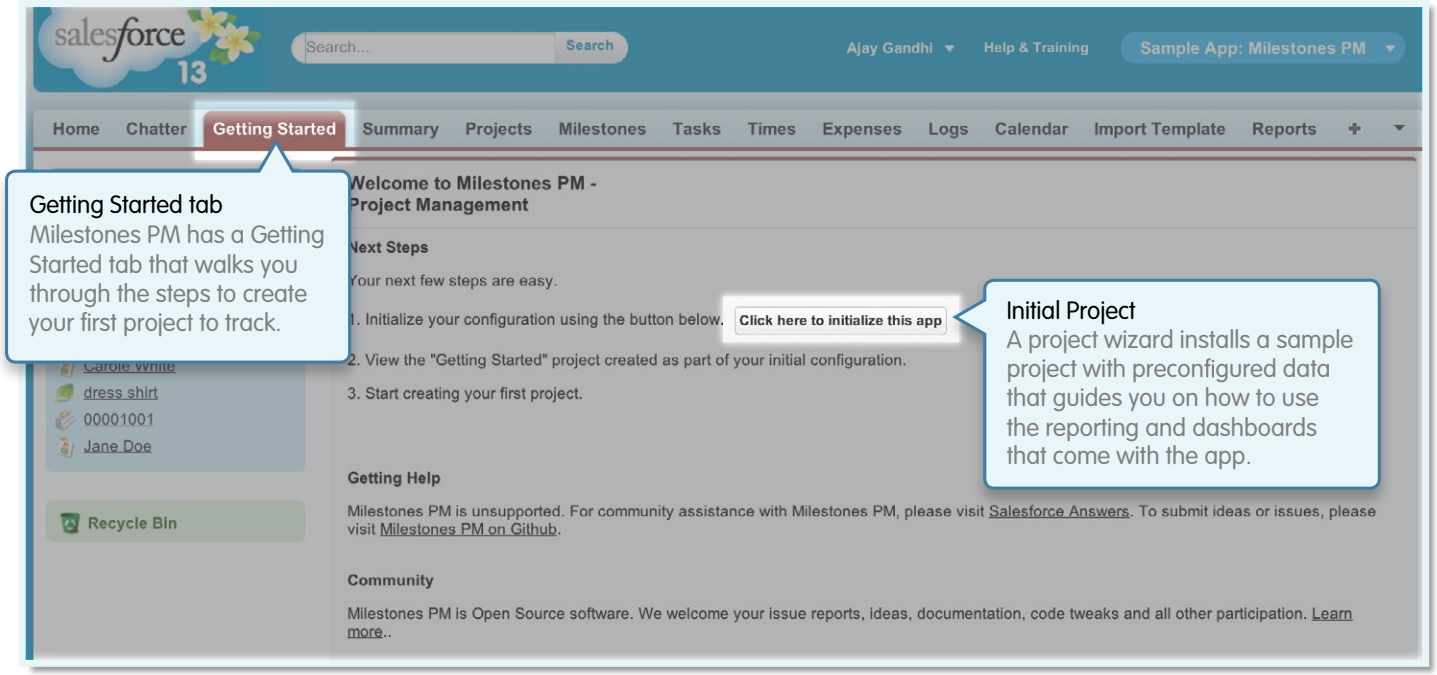


Survey Force. You can use the app to easily:

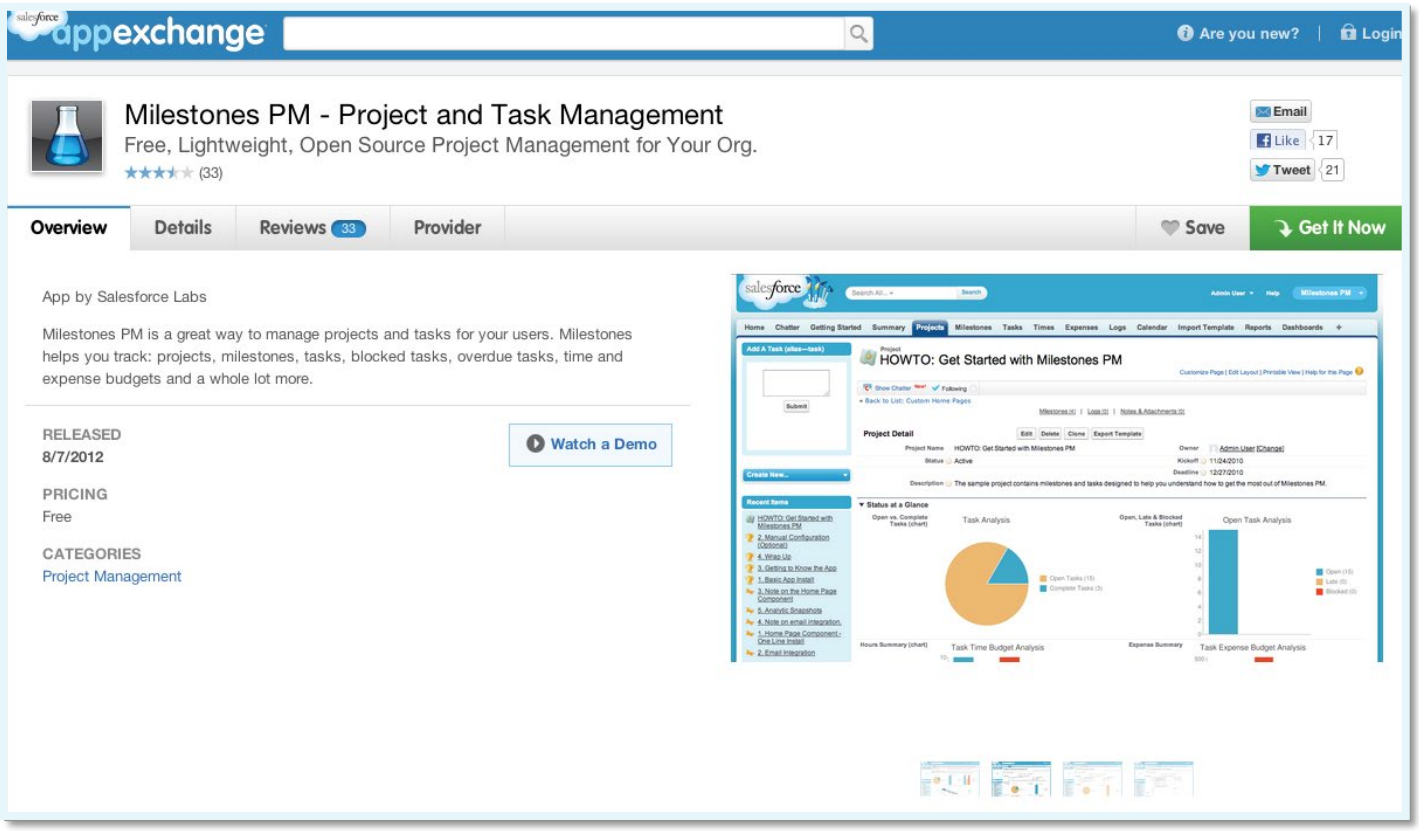
- Create and order questions via drag and drop
- Distribute surveys via email templates and external sites
- Capture results from Contacts and/or Cases
- Use reports and dashboards to analyze your results



Milestones PM. The Milestones PM sample app can be used to manage a variety of items for your users including projects, milestones, tasks, times, and expense budgets. You can create tasks using email integration or a simple single line interface.



Milestones PM. For more information on how to customize Milestones PM, check out the demo and reference guides on AppExchange, just search for the Milestones PM app built by Salesforce Labs!



Reporting and Dashboards. Both Survey Force and Milestones PM come with pre-designed reports and dashboards that you can use to explore the apps and modify as you need. Your Force.com trial also comes pre-loaded with best practice CRM dashboards that can be used as starting points for your Sales and Service Cloud implementations.