



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

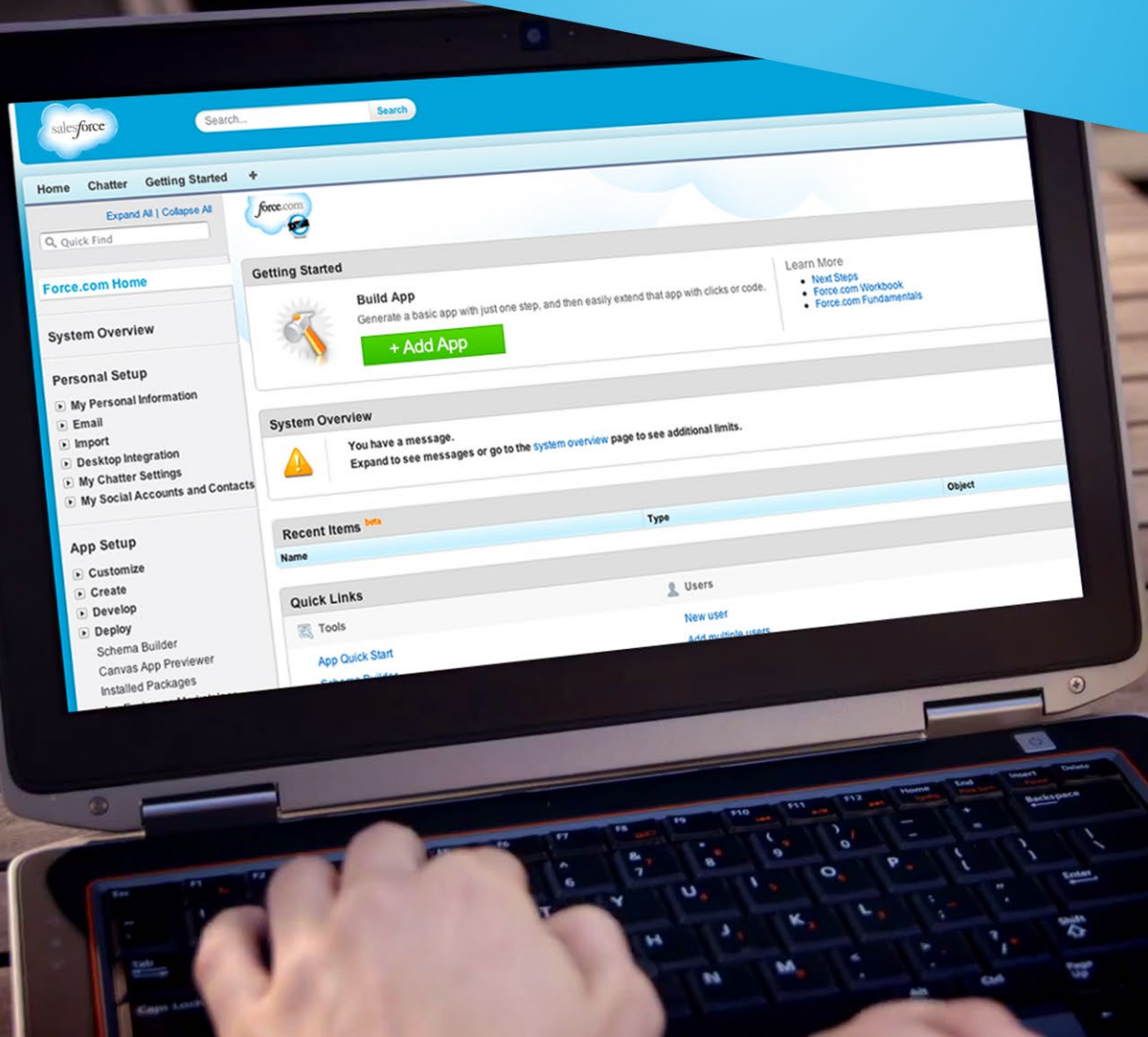


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The fastest path from idea to app starts with Force.com on the Salesforce Platform. Trusted by over 100,000 customers, the Salesforce Platform brings together services like Force.com, Heroku, Database.com and Site.com. And this quick peek at Force.com 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.

The screenshot shows the Salesforce 'Getting Started' page. At the top, there's a navigation bar with 'Home', 'Chatter', and 'Getting Started' tabs. A search bar is also present. Below the navigation bar, the main content area features a large video player titled 'HOW TO... Navigate Your Force.com Trial'. To the right of the video, there's a 'Take a Tour' section with links to 'How to Navigate Your Force.com', 'Build Your First App', 'Extend Your CRM', and 'Explore Sample Apps'. Below this is a 'Learn more' section with a link to 'Force.com Workbooks'. At the bottom, there's a link to 'Download our Getting Started PDF guide to walk through the steps in the video.'.

Help & Training
This link takes you to our help portal where you can get help on specific topics, or ask questions that you have in our customer community.

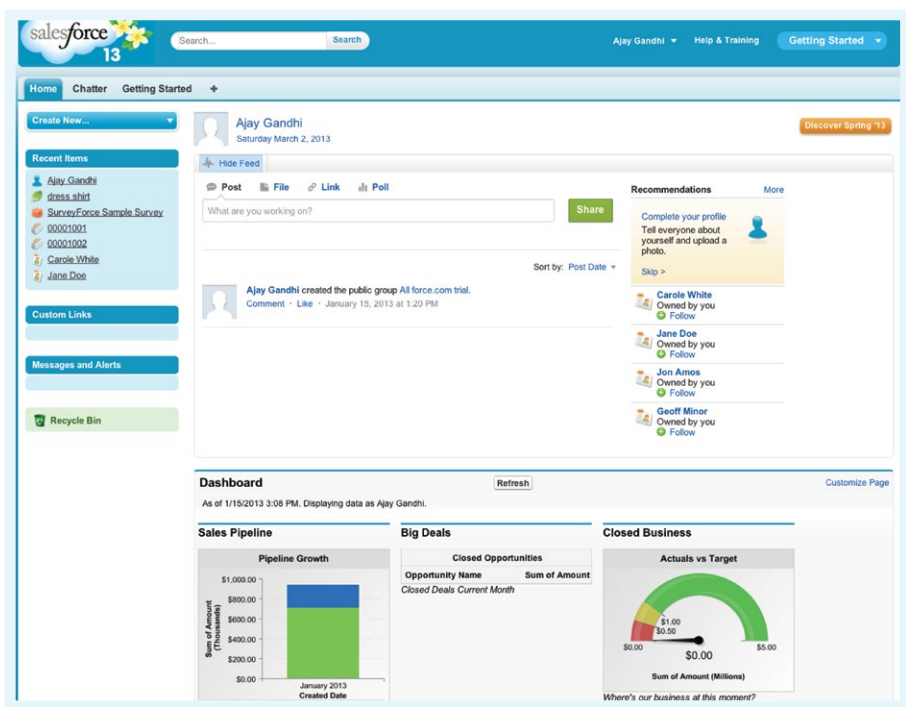
Tabs
Every Force.com app is a collection of tabs which you can use to quickly jump to different areas of the app. The Getting Started app is the starting point for your Force.com trial.

Force.com App Menu
Your available apps are listed in this drop-down list that displays at the top of every Salesforce page. Your Force.com trial comes pre-loaded with sample apps and Salesforce CRM apps for sales and customer service. You can always use this menu to get back to the Getting Started app anytime during your trial.

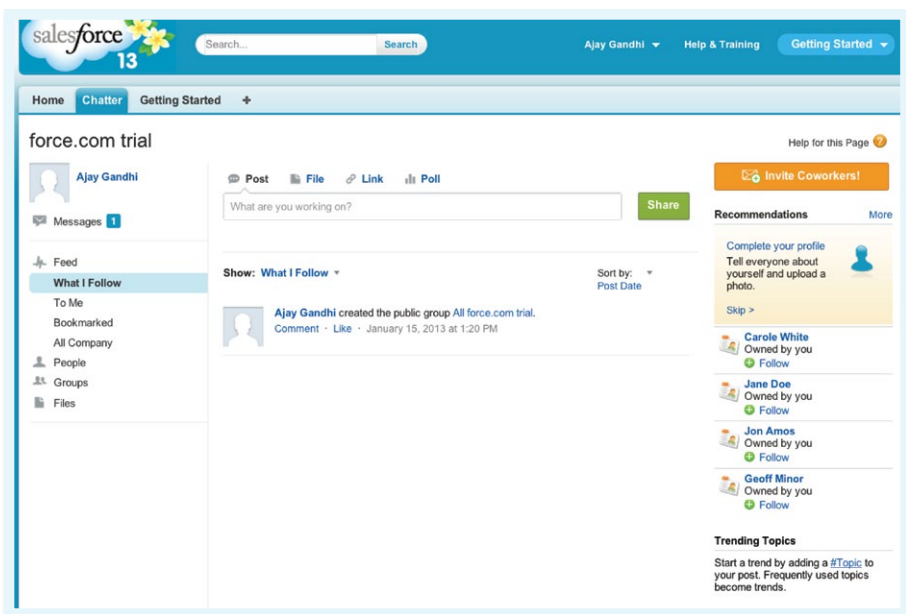
Sample App: Shopping List
Sample App: Survey Force
Sample App: Milestones PIM
Sales
Call Center
Add AppExchange Apps...
Create New Apps...

Want to watch the video while working in the app?
Pop out tutorial in a separate window >

Download our Getting Started PDF guide to walk through the steps in the video.
[Getting started guide >](#)



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**.

Setup Menu
In the left pane, use the Setup menu to access all setup actions. The Setup menu includes tools for browsing and searching setup options.

Getting Started Section of Setup
Click the Add App button to start the Quick Start wizard, a step-by-step tool for generating a basic app in a single step.

App Setup
Contains options for creating custom apps and adding new components such as objects, fields and tabs. Also contains options to customize existing objects and apps.

Administration Setup
Contains options for configuring apps such as defining users, roles, access settings and security.

Links to Developer Resources
The developerforce section contains links to robust developer content and access to the Force.com developer community.

AppExchange
The world's leading business apps marketplace. Click here to find ready-to-use apps, covering every department and industry built by Salesforce partners. You can install and use AppExchange apps as part of your Force.com trial.

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.

App Quick Start

Tell us about your app, and we'll whip up the basic parts for you.

What's the name of your app?
(You can always change this and other labels later.) * = Required Field

* App Example: Recruiting

What's the main type of data you need to track? ⓘ
(You can add more objects later.)

* Label Example: Position

* Plural Label Example: Positions

☐ Starts with vowel sound

Preview:

v

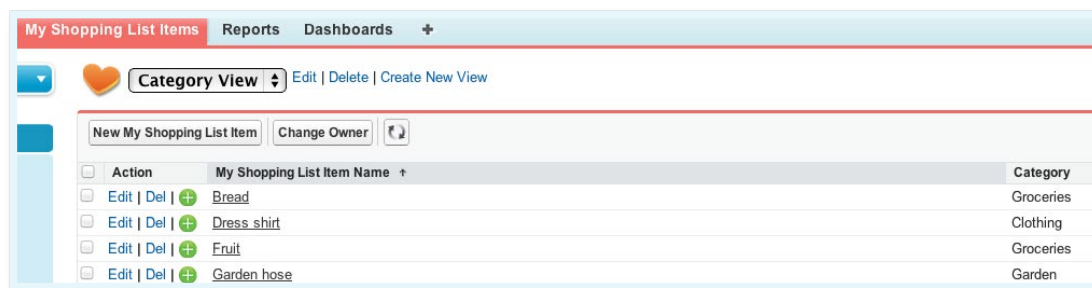
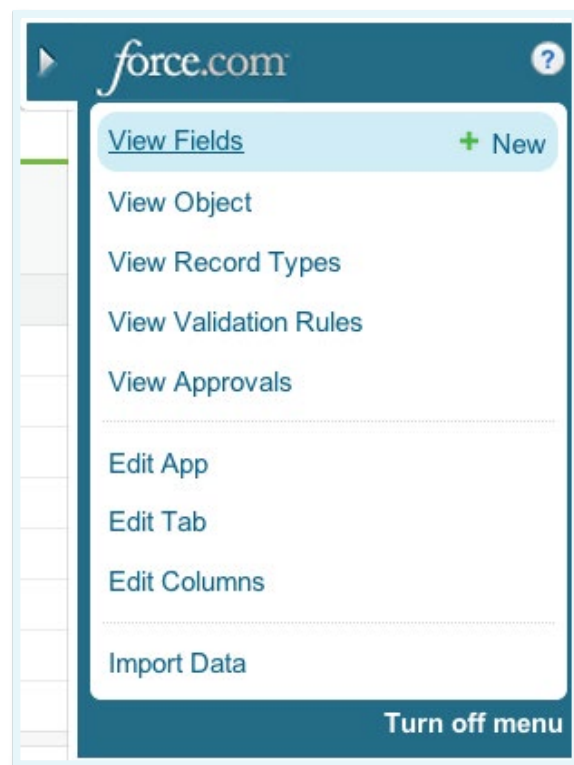
Home Chatter Files **Your Tab** Reports Dashboards

My Shopping List Item

Create

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.

The screenshot shows the Salesforce 'Getting Started' page. At the top, there's a navigation bar with the Salesforce logo, a search bar, and user information (Ajay Gandhi). Below this is a sub-navigation bar with 'Home', 'Chatter', and 'Getting Started' (selected). The main content area features a large video player with the title 'HOW TO... Extend Your Salesforce CRM with Force.com'. To the right of the video, there's a list of links: 'Take a Tour', 'Build Your First App', 'Extend Your CRM' (selected), and 'Explore Sample Apps'. Below these links, there's a section titled 'Learn more' with a link to 'Force.com Workbooks'. At the bottom, there's a link to 'Download our Getting Started PDF guide to walk through the steps in the video. Getting started guide >'. On the right side, there's a dropdown menu for 'Getting Started' with options: 'Sample App: Shopping List', 'Sample App: Survey Force', 'Sample App: Milestones PM', 'Sales' (selected), 'Call Center', 'Add AppExchange Apps...', and 'Create New Apps...'.

Get the most out of Force.com with these easy steps

Ready to buy? Call 1-800-NO-SOFTWARE.

How To Extend Your Salesforce CRM with Force.com

HOW TO...
Extend Your Salesforce CRM with Force.com

You can use Force.com to easily extend your Salesforce CRM apps for sales and customer service. In this video we'll give you an overview on how to get started!

☒ Want to watch the video while working in the app?
[Pop out tutorial in a separate window >](#)

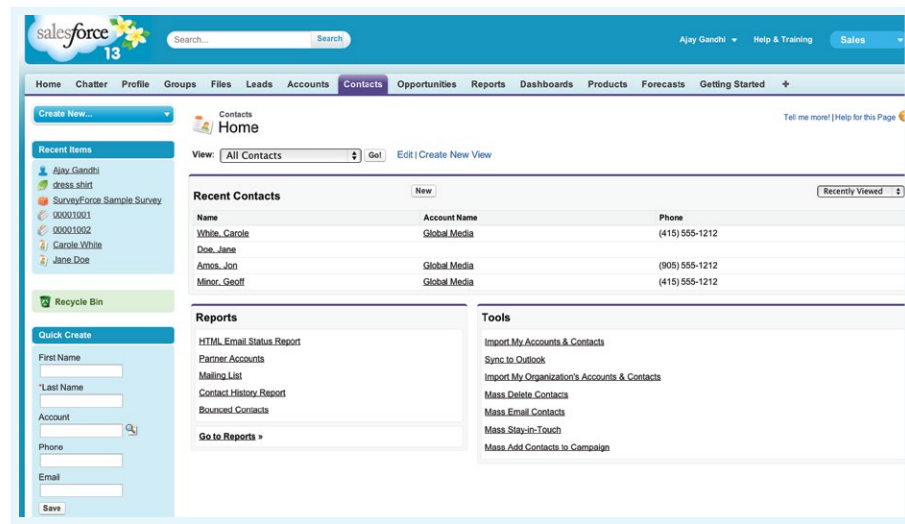
- Take a Tour
- Build Your First App
- Extend Your CRM
- Explore Sample Apps

Learn more
Take your app building to the next level with Force.com workbooks and go deep into topics such as mobile, workflows, custom UI, analytics and integration.
[Force.com Workbooks >](#)

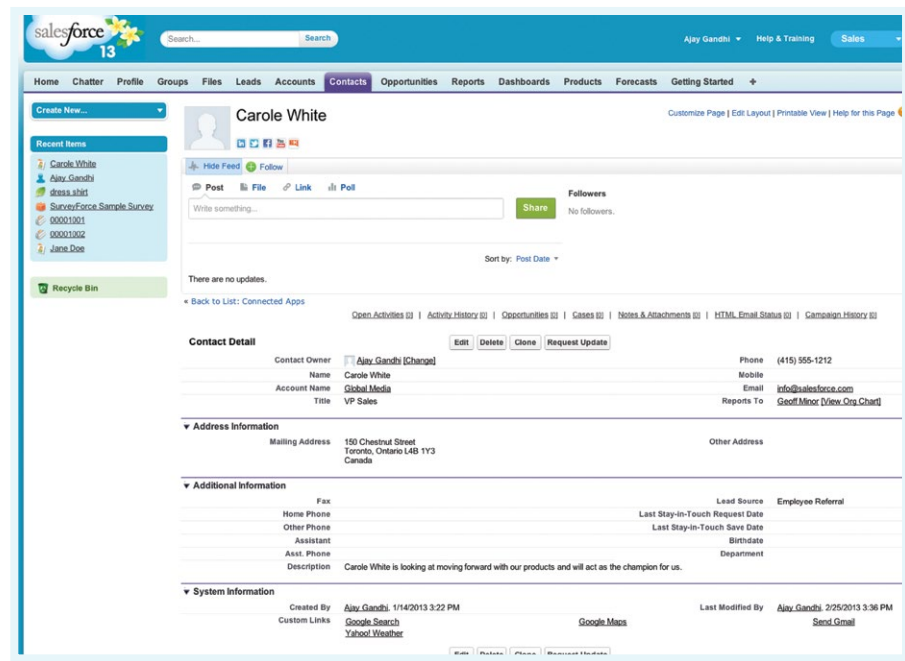
Download our Getting Started PDF guide to walk through the steps in the video.
[Getting started guide >](#)

Sample App: Shopping List
Sample App: Survey Force
Sample App: Milestones PM
Sales
Call Center
Add AppExchange Apps...
Create New Apps...

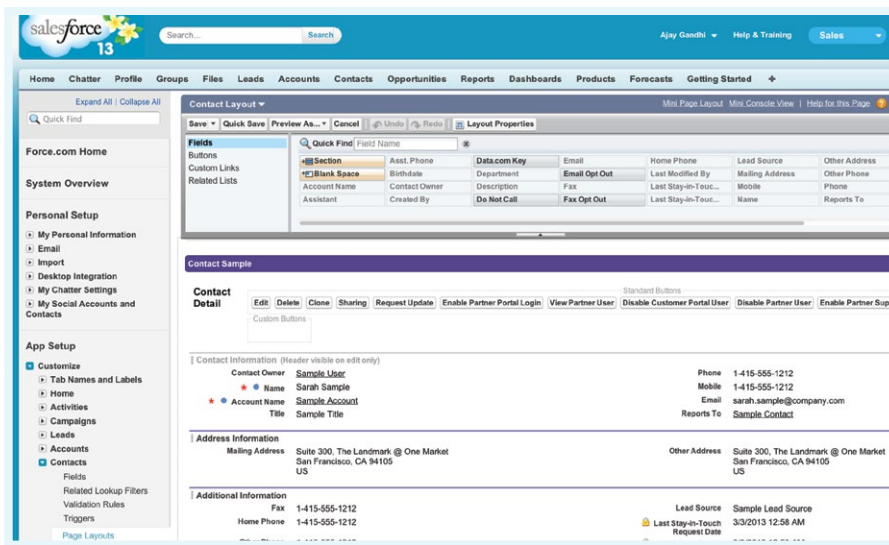
This tutorial walks you through an example of how the Sales app can be extended using Force.com by customizing the page layout of contact records. Contacts are standard objects in Sales Cloud.



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.

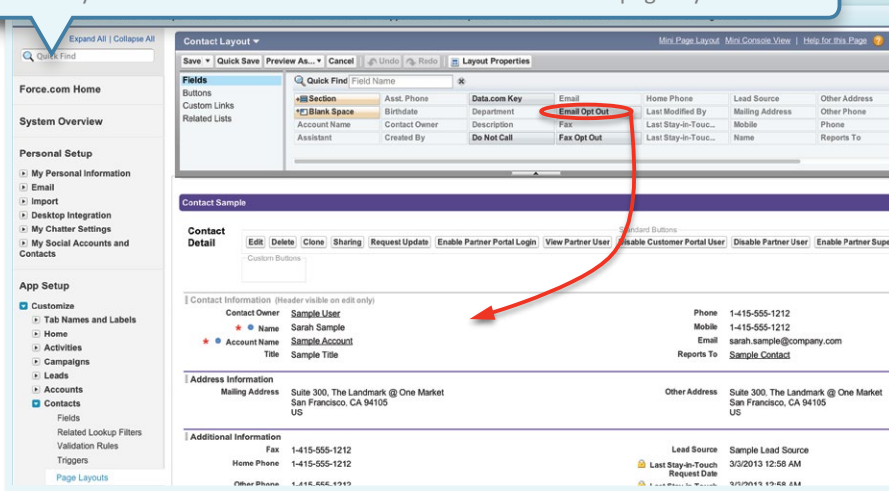



We'll customize the Contacts object by adding an existing field to the page layout view for contact record details.

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

Palette

Contains the user interface elements, such as fields, buttons, links, related lists, and any additional elements that are available to add to the page 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!

The screenshot shows the Salesforce interface for a contact record named 'Carole White'. The 'Email Opt Out' field is highlighted with a white box and a checkmark, indicating it is enabled. The interface includes a navigation bar at the top with tabs like Home, Chatter, Profile, Groups, Files, Leads, Accounts, and Contacts. The left sidebar shows a list of recent items and a recycle bin. The main content area displays the contact's details, including name, account name, title, address, and system information.

Contact Detail	
Contact Owner	Ajay Gandhi [Change]
Name	Carole White
Account Name	Global Media
Email Opt Out	<input checked="" type="checkbox"/>
Title	VP Sales

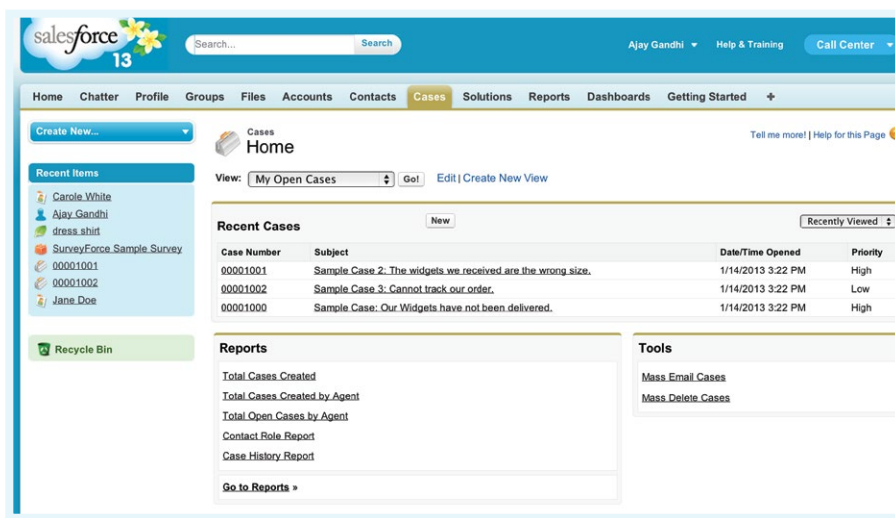
Address Information	
Mailing Address	150 Chestnut Street Toronto, Ontario L4B 1Y3 Canada
Other Address	

Additional Information	
Fax	
Home Phone	
Other Phone	
Assistant	
Asst. Phone	
Description	Carole White is looking at moving forward with our products and will act as the champion for us.

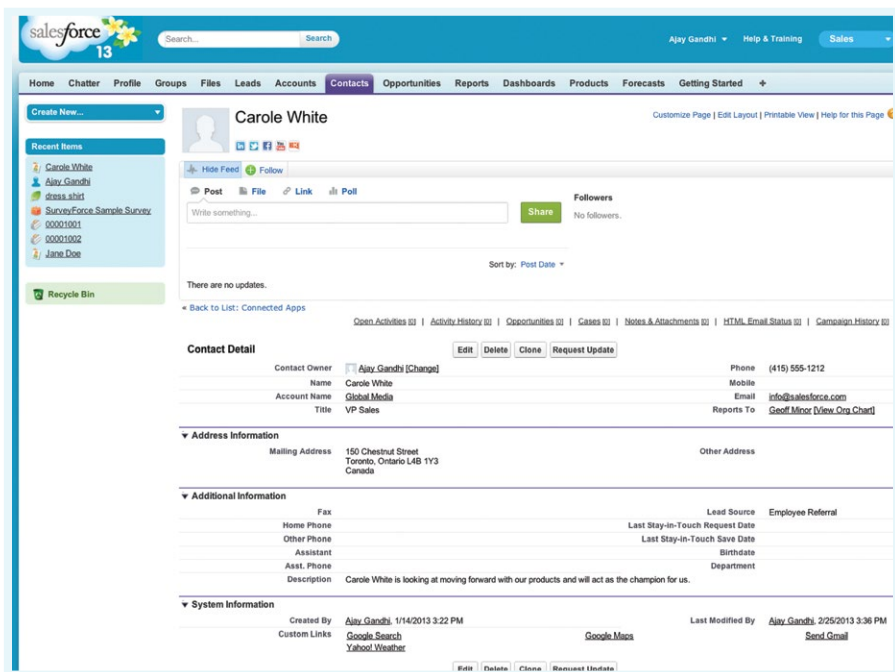
System Information	
Created By	Ajay Gandhi, 1/14/2013 3:22 PM
Custom Links	Google Search, Yahoo! Weather
Last Modified By	Ajay Gandhi, 2/25/2013 3:36 PM
	Send Gmail

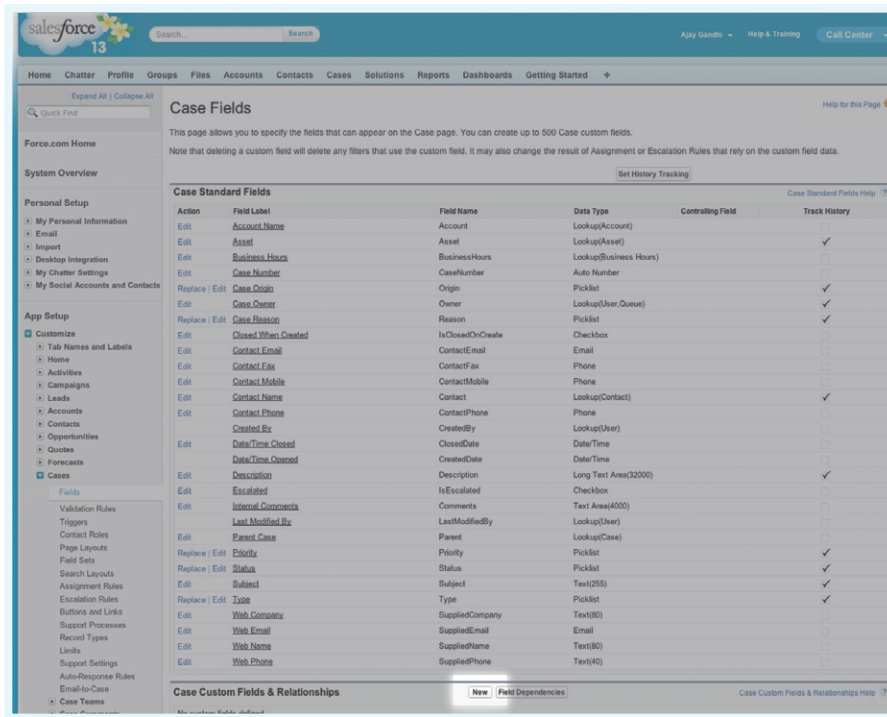
By using the Setup menu that is part of Force.com, you can create custom fields to track new information that doesn't already exist in your Salesforce CRM app. This tutorial walks you through an example of how the Call Center app can be extended using Force.com by adding a custom field to the existing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

Step 1. Choose the field type

Step 1

Next

Cancel

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

Data Type

☐ None Selected

Select one of the data types below.

☐ Auto Number

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

☒ 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.

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.

Case
New Custom Field

Help for this Page

Step 2. Choose output type Step 2 of 5

Previous Next Cancel

Field Label Case Age Field Name Case_Age

Formula Return Type

☐ None Selected Select one of the data types below.

☐ Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost__c`

☐ Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date = CloseDate - 7`

☐ Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `Next = NOW() + 1`

☒ Number Calculate a numeric value.
Example: `Fahrenheit = 1.8 * Celsius c + 32`

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.

Case
New Custom Field

Help for this Page

Step 3. Enter formula Step 3 of 5

Previous Next Cancel

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: `Fahrenheit = 1.8 * Celsius__c + 32` More Examples...

Simple Formula Advanced Formula

Select Field Type --None-- Insert Field -- No compatible field Insert Operator

Switch to the Advanced Formula tab to see all available fields.

Case Age (Number) =
`IF(IsClosed, ROUND(ClosedDate - CreatedDate, 0), ROUND((NOW() - CreatedDate), 0))`

Check Syntax No syntax errors in merge fields or functions. (Compiled size: 192 characters)

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!

The screenshot shows the Salesforce interface for a Case record. The top navigation bar includes the Salesforce logo, a search bar, and user information (Ajay Gandhi). The main navigation menu shows tabs for Home, Chatter, Profile, Groups, Files, Accounts, Contacts, **Cases**, Solutions, Reports, Dashboards, and Getting Started. The left sidebar contains a 'Recent Items' list and a 'Recycle Bin' link.

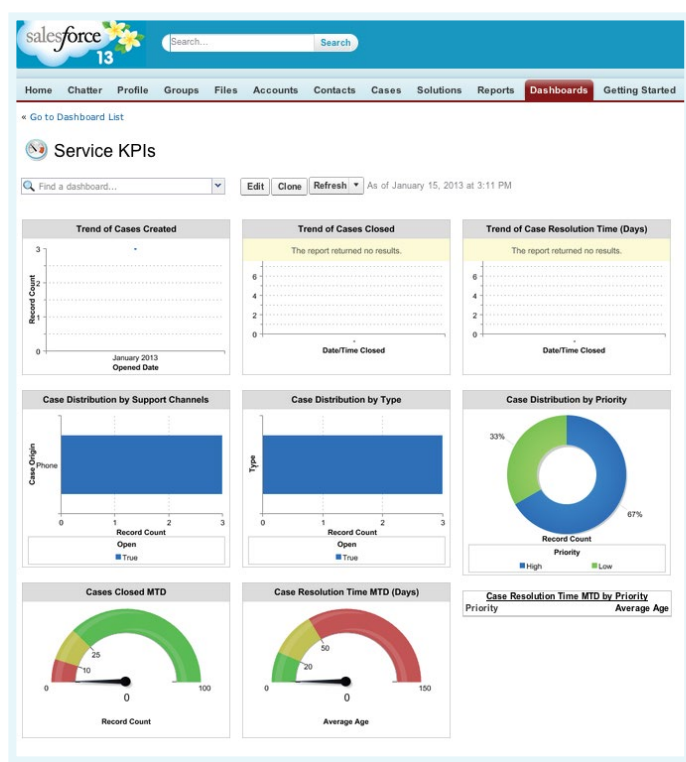
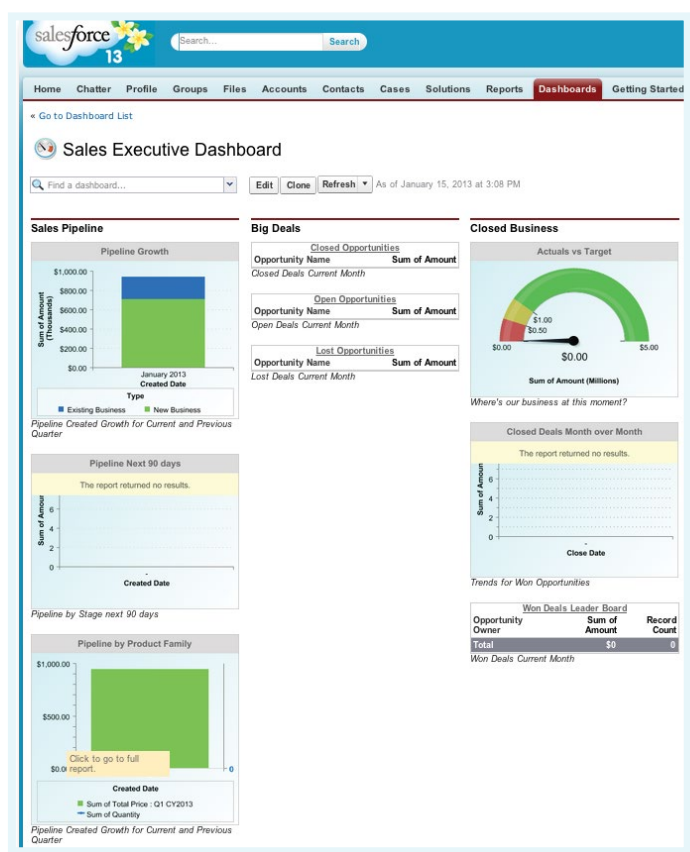
The Case record for Case 00001002 is displayed. The 'Case Detail' section includes fields for Case Owner (Ajay Gandhi), Case Number (00001002), Contact Name (Edward Stamos), Account Name (Acme), and Case Age (47.00). The 'Additional Information' section shows Status (On Hold), Case Origin (Phone), Priority (Low), Subject (Sample Case 3: Cannot track our order.), and Date/Time Opened (1/14/2013 3:22 PM). The 'System Information' section shows Created By (Ajay Gandhi, 1/14/2013 3:22 PM) and Last Modified By (Ajay Gandhi, 1/14/2013 3:22 PM).

Case Detail	
Case Owner	Ajay Gandhi [Change]
Case Number	00001002
Contact Name	Edward Stamos
Account Name	Acme
Case Age	47.00

Additional Information	
Status	On Hold
Case Origin	Phone
Priority	Low
Subject	Sample Case 3: Cannot track our order.
Date/Time Opened	1/14/2013 3:22 PM

System Information	
Created By	Ajay Gandhi, 1/14/2013 3:22 PM
Last Modified By	Ajay Gandhi, 1/14/2013 3:22 PM

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.

The screenshot shows the Salesforce Force.com trial interface. At the top, there's a blue header with the Salesforce logo, a search bar, and user information (Ajay Gandhi, Help & Training, Getting Started). Below the header, there's a navigation bar with 'Home', 'Chatter', and 'Getting Started'. The main content area is titled 'Get the most out of Force.com with these easy steps' and 'Ready to buy? Call 1-800-NO-SOFTWARE.' It then says 'How to Explore Sample Apps in Your Force.com Trial' and features a video player with the title 'HOW TO... Explore Sample Apps in Your Force.com Trial'. To the right of the video, there's a list of links: 'Take a Tour', 'Build Your First App', 'Extend Your CRM', and 'Explore Sample Apps'. Below this list, there's a video thumbnail and title 'How to Explore Sample Apps in Your Force.com Trial' with a duration of 2:48. Further down, there's a 'Learn more' section with a link to 'Force.com Workbooks'. At the bottom, there's a checkbox for 'Want to watch the video while working in the app?' and a link to 'Pop out tutorial in a separate window'. On the right side of the interface, there's a dropdown menu for 'Getting Started' with options: 'Sample App: Shopping List', 'Sample App: Survey Force', 'Sample App: Milestones PM', 'Sales', 'Call Center', 'Add AppExchange Apps...', and 'Create New Apps...'.

Get the most out of Force.com with these easy steps

Ready to buy? Call 1-800-NO-SOFTWARE.

How to Explore Sample Apps in Your Force.com Trial

HOW TO...
Explore Sample Apps in Your
Force.com Trial

Your trial comes pre-loaded with a few sample apps built on Force.com that you can explore. In this video, we'll give you a quick overview of a full featured project management app, a nifty survey app, and cool CRM dashboards. All the apps come with sample data so start exploring!

☒ Want to watch the video while working in the app?
[Pop out tutorial in a separate window >](#)

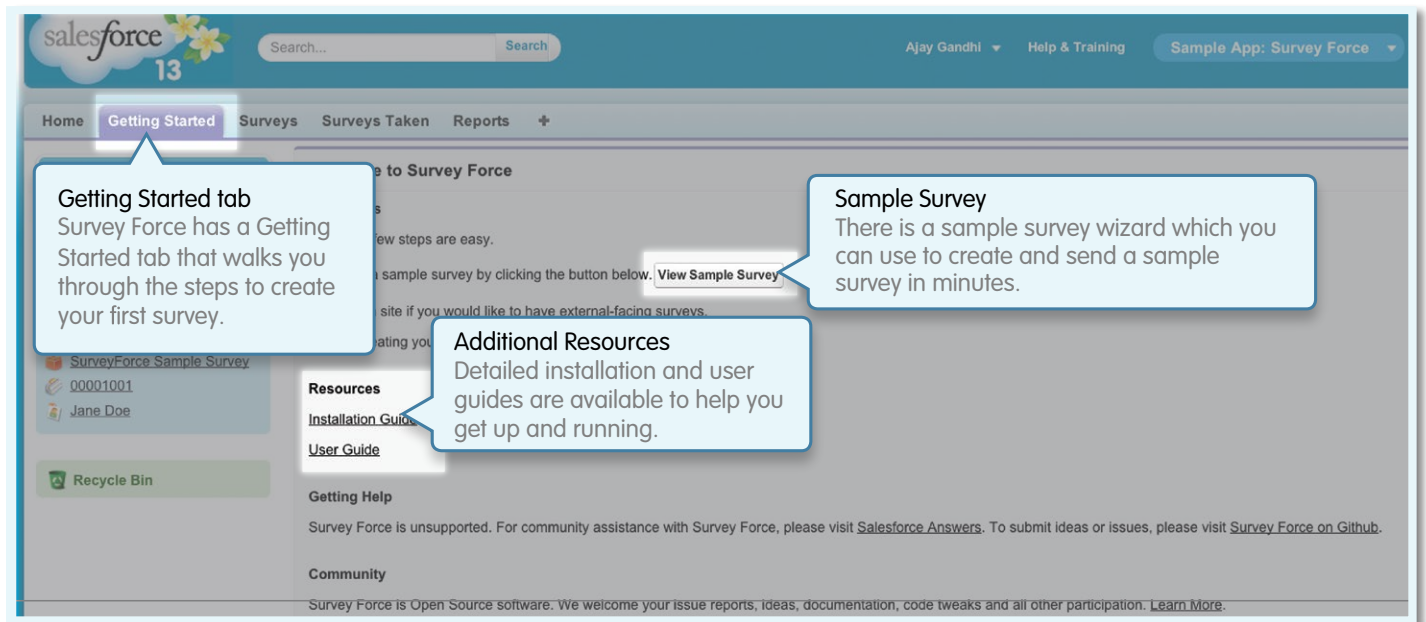
Take a Tour
Build Your First App
Extend Your CRM
Explore Sample Apps

How to Explore Sample Apps in Your Force.com Trial
2:48

Learn more
Take your app building to the next level with Force.com workbooks and go deep into topics such as mobile, workflows, custom UI, analytics and integration.
[Force.com Workbooks >](#)

Download our Getting Started PDF guide to walk through the steps in the video.
[Getting started guide >](#)

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

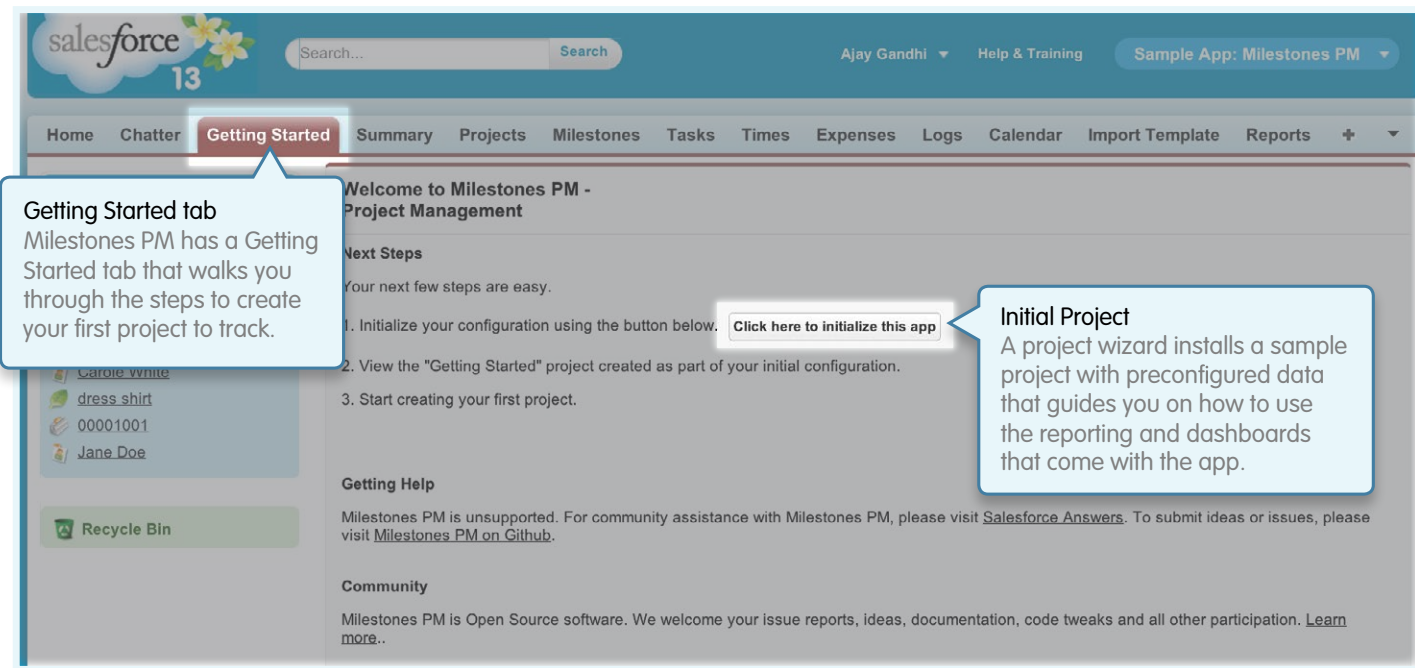


Survey Force. You can use the app to easily:

- 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

The screenshot shows the Salesforce interface for the 'SurveyForce Sample Survey' app. The top navigation bar includes the Salesforce logo, a search bar, and user information (Ajay Gandhi, Help & Training, and a dropdown for 'Sample App: Survey Force'). The main navigation tabs are Home, Getting Started, Surveys, Surveys Taken, and Reports. The 'Surveys' tab is active, showing a 'Create New...' button and a 'Recent Items' list with entries like 'SurveyForce Sample Survey', '00001002', 'Ajay Gandhi', 'Carole White', 'dress_shirt', '00001001', and 'Jane Doe'. A 'Recycle Bin' button is also visible. The main content area is titled 'SurveyForce Sample Survey' and includes tabs for 'Share', 'Edit', 'Header, Thank You & CSS', and 'Results'. The 'Share' tab is active, displaying 'Share My Survey' options. It shows 'Sharing Options' set to 'Chatter' and a 'Chatter Link' to a specific survey URL. Below this, there are four testing questions: 1. 'Testing Question question0 (required)' with radio button options 'one', 'two', and 'three'. 2. 'Testing Question question1 (required)' with checkbox options 'four', 'five', and 'six'. 3. 'Testing Question question2 (required)' with radio button options 'seven', 'eight', and 'nine'. 4. 'Testing Question question3 (required)' with a large text input area. At the bottom, there is an 'Answer as:' section with radio buttons for 'Anonymous' (selected) and 'User Ajay Gandhi', and a 'Submit Survey' button.

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!

Milestones PM - Project and Task Management
Free, Lightweight, Open Source Project Management for Your Org.
★★★★★ (33)

Overview Details Reviews (33) Provider Save Get It Now

App by Salesforce Labs

Milestones PM is a great way to manage projects and tasks for your users. Milestones helps you track: projects, milestones, tasks, blocked tasks, overdue tasks, time and expense budgets and a whole lot more.

RELEASED
8/7/2012

PRICING
Free

CATEGORIES
Project Management

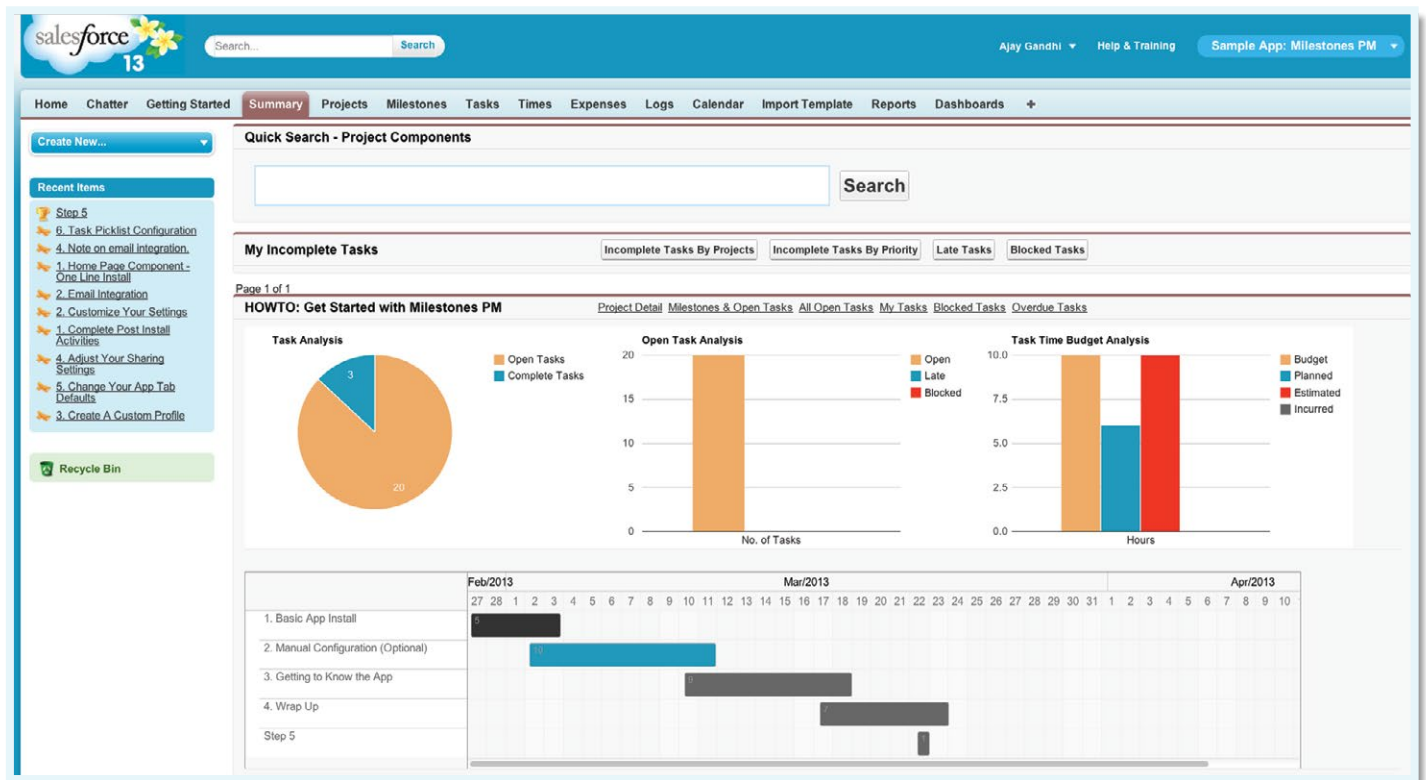
[Watch a Demo](#)

App Preview:

The preview shows the app's interface with a sidebar menu and a main content area. The main content area displays a project named "HOWTO: Get Started with Milestones PM" with a status of "Active". It includes a "Project Detail" section with fields for Project Name, Status, and Owner. Below this, there are several charts and tables:

- Status at a Glance:** A pie chart showing the distribution of task statuses: Open (15), Complete (3), and Blocked (2).
- Task Analysis:** A bar chart showing the number of open, late, and blocked tasks.
- Open Task Analysis:** A bar chart showing the number of open tasks.
- Hours Summary:** A bar chart showing the total hours spent on tasks.
- Task Time Budget Analysis:** A bar chart showing the budget for task time.
- Expense Summary:** A bar chart showing the total expenses.
- Task Expense Budget Analysis:** A bar chart showing the budget for task expenses.

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.





TAKE THE NEXT STEP.



GET STARTED ON TURNING
YOUR IDEAS INTO BUSINESS APPS
that can revolutionize the way
your company with our 30-day
free force.com trial. or watch our
introductory platform demo video.