



salesforce®

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

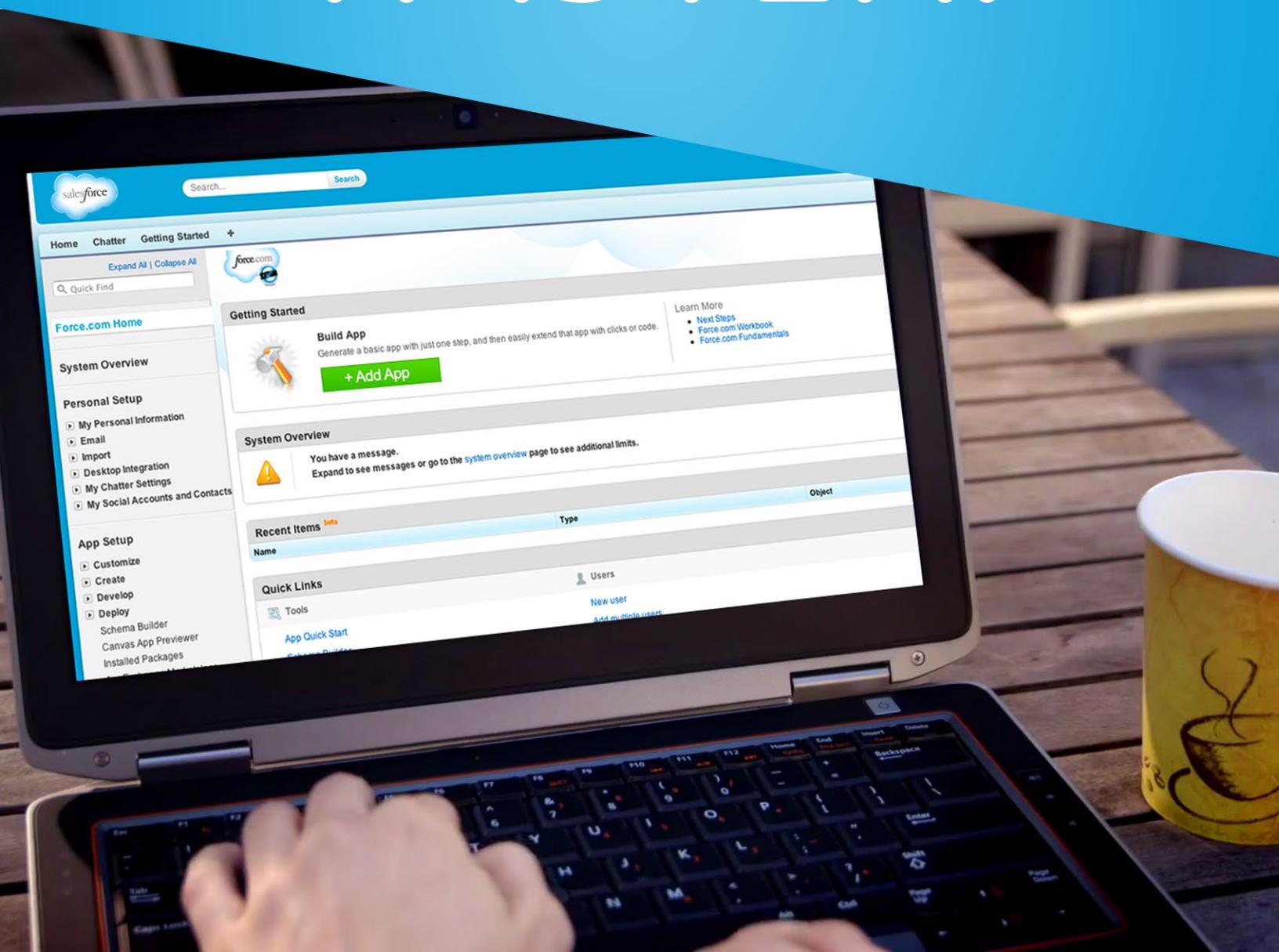




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The fastest path from idea to app starts with Force.com on the Salesforce Platform. Trusted by over 100,000 customers, the Salesforce Platform brings together services like Force.com, Heroku, Database.com and Site.com. And this quick peek at Force.com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

The screenshot shows the Salesforce Getting Started app interface. At the top, there's a navigation bar with tabs: Home, Chatter, Getting Started (which is highlighted), and a plus sign. Below the navigation bar, there's a search bar with placeholder text "Search..." and a "Search" button. The main content area has a title "HOW TO... Navigate Your Force.com Trial" with a play button icon. To the right of the title, there's a "SOFTWARe" logo. Below the title, a message reads: "Welcome to your Force.com trial. In this video, we'll get you started by showing you how to get around your trial and how you can quickly get up and running." Underneath this message, there's a checkbox labeled "Want to watch the video while working in the app? Pop out tutorial in a separate window" with a checked box. To the right of the main content area, there are three callout boxes:

- 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.

In the bottom right corner of the main content area, there's a "Help & Training" button and a "Getting Started" button. A dropdown menu is open from the "Getting Started" button, listing options: Sample App: Shopping List, Sample App: Survey Force, Sample App: Milestones PM, Sales, Call Center, Add AppExchange Apps..., and Create New Apps...

The screenshot shows the Salesforce Home tab. On the left, there's a sidebar with 'Recent Items' (Ajay Gandhi, dress shirt, SurveyForce Sample Survey, 00001001, 00001002, Carole White, Jane Doe), 'Custom Links', 'Messages and Alerts', and 'Recycle Bin'. The main area has a Chatter feed for 'Ajay Gandhi' (Saturday March 2, 2013) with a post input field and a share button. Below it is a 'Discover Spring '13' section. To the right is a 'Recommendations' sidebar with links to complete profile, tell everyone about yourself, and upload a photo. A 'Sort by: Post Date' dropdown is shown. The bottom half features a 'Dashboard' section with three cards: 'Sales Pipeline' (Pipeline Growth chart for January 2013), 'Big Deals' (Closed Opportunities table), and 'Closed Business' (Actuals vs Target gauge).

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.

The screenshot shows the Salesforce Chatter tab. The sidebar includes 'Home', 'Chatter' (selected), 'Getting Started', 'Ajay Gandhi' profile, 'Messages 1', 'Feed', 'What I Follow' (selected), 'To Me', 'Bookmarked', 'All Company', 'People', 'Groups', and 'Files'. The main area shows a Chatter feed for 'Ajay Gandhi' (Ajay Gandhi created the public group All force.com trial, Comment · Like · January 15, 2013 at 1:20 PM). There are buttons for 'Post', 'File', 'Link', 'Poll', 'Share', and 'Invite Coworkers!'. A 'Recommendations' sidebar is present with links to complete profile, tell everyone about yourself, and upload a photo. A 'Sort by: Post Date' dropdown is also here. At the bottom is a 'Trending Topics' section with a note about adding hashtags to posts.

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.

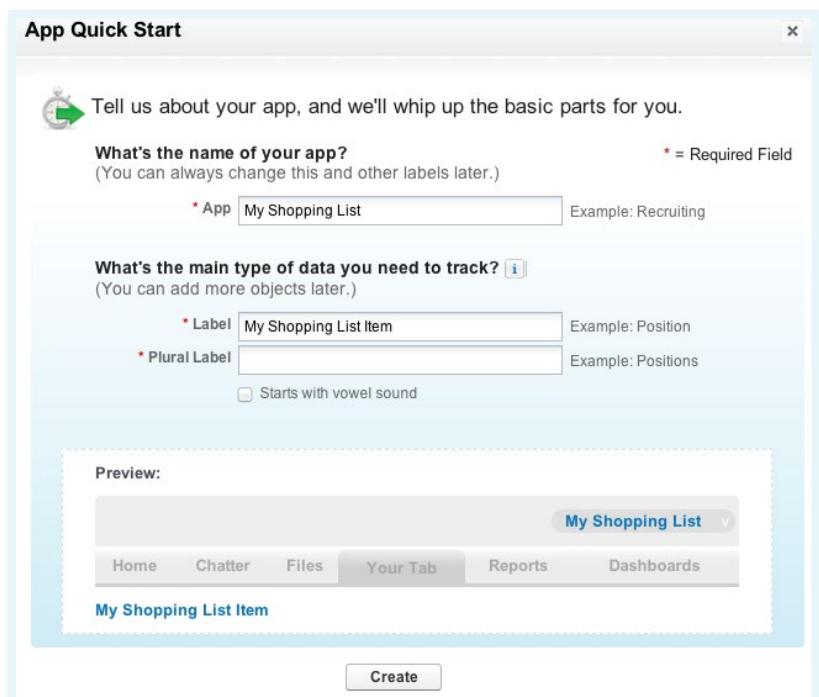
AppExchange
The world's leading business apps marketplace. Click here to find ready-to-use apps, covering every department and industry built by Salesforce partners. You can install and use AppExchange apps as part of your Force.com trial.

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.

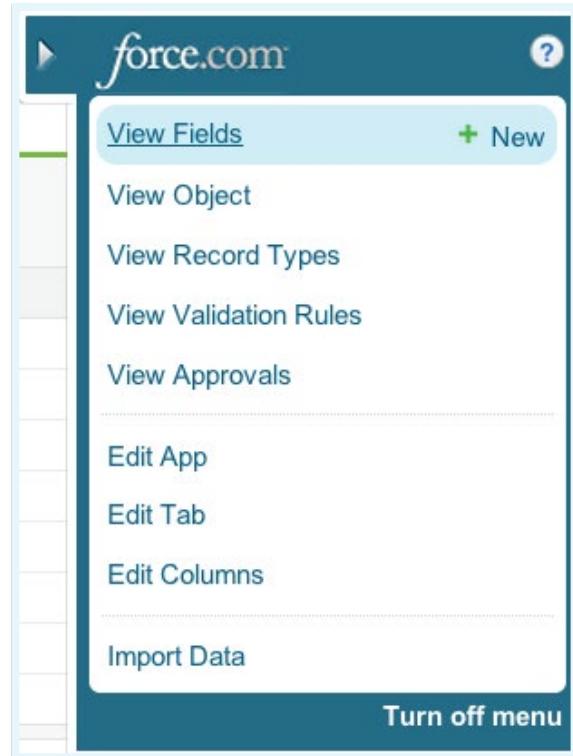
Create A Simple App

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.



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.



This screenshot shows the 'My Shopping List Items' page. At the top, there are tabs for 'My Shopping List Items', 'Reports', 'Dashboards', and a plus sign. Below the tabs, there is a toolbar with a heart icon, a 'Category View' dropdown set to 'Category View', and links for 'Edit | Delete | Create New View'. A sidebar on the left has a downward arrow icon. The main area displays a table titled 'My Shopping List Item Name'. The table has columns for 'Action', 'My Shopping List Item Name', and 'Category'. There are five rows of data:

Action	My Shopping List Item Name	Category
<input type="checkbox"/> Edit Del +	Bread	Groceries
<input type="checkbox"/> Edit Del +	Dress shirt	Clothing
<input type="checkbox"/> Edit Del +	Fruit	Groceries
<input type="checkbox"/> Edit Del +	Garden hose	Garden

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 homepage with a blue header. In the top right corner, there's a dropdown menu titled "Getting Started" with options like "Sample App: Shopping List", "Sales", and "Call Center". Below the header, there's a navigation bar with links for "Home", "Chatter", "Getting Started", and a plus sign. The main content area has a title "Get the most out of Force.com with these easy steps" and a subtitle "Ready to buy? Call 1-800-NO-SOFTWARE.". A large video thumbnail on the left says "HOW TO... Extend Your Salesforce CRM with Force.com". To the right of the video, there's a sidebar with sections for "Take a Tour", "Build Your First App", "Extend Your CRM" (which is expanded to show a video thumbnail for "How To Extend Your Salesforce CRM with Force.com" and a duration of 4:30), "Explore Sample Apps", and "Learn more" which links to "Force.com Workbooks". At the bottom, there's a callout for "Download our Getting Started PDF guide to walk through the steps in the video." and a link to "Getting started guide".

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Search... Search

Ajay Gandhi ▾ Help & Training Getting Started ▾

Home Chatter Getting Started +

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

salesforce SOFTWARE

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

How To Extend Your Salesforce CRM with Force.com
4:30

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](#)

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.

The screenshot shows the Salesforce Sales Cloud interface. The top navigation bar includes Home, Chatter, Profile, Groups, Files, Leads, Accounts, Contacts, Opportunities, Reports, Dashboards, Products, Forecasts, Getting Started, and Sales. The Contacts tab is selected. On the left, there's a sidebar for 'Recent Items' and 'Quick Create' fields. The main content area displays a list of 'Recent Contacts' with columns for Name, Account Name, and Phone. Below this is a 'Reports' section with links to various reports and a 'Tools' section with links to import accounts, sync with Outlook, and mass delete contacts.

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.

The screenshot shows the Salesforce Sales Cloud interface for a specific contact named Carole White. The top navigation bar is identical to the previous screenshot. The main content area shows the 'Contact Detail' page for Carole White. It includes sections for 'Address Information' (Mailing Address: 160 Chestnut Street, Toronto, Ontario L4B 1Y3, Canada), 'Additional Information' (Fax, Home Phone, Other Phone, Assistant, Aext. Phone, Description), and 'System Information' (Created By: Ajay Gandhi, Last Modified By: Ajay Gandhi, Last Modified Date: 1/25/2013 3:36 PM). The page also features social sharing options (Post, File, Link, Poll) and a 'Follow' button.

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.

The screenshot shows the Salesforce Page Layout editor interface. At the top, there's a toolbar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. Below the toolbar is a palette titled 'Fields' containing sections for 'Buttons', 'Custom Links', and 'Related Lists'. A 'Blank Space' section is highlighted with a yellow background. The main area shows a 'Contact Sample' page layout with three sections: 'Contact Information', 'Address Information', and 'Additional Information'. The 'Email Opt Out' field from the palette is being dragged and dropped into the 'Contact Information' section of the page layout.

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.

This screenshot is similar to the one above, showing the Page Layout editor for the Contact layout. A red arrow points from the 'Email Opt Out' field in the 'Fields' palette down to its corresponding position in the 'Contact Information' section of the page layout. This visual cue indicates where the field is being placed.

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 Sales Cloud interface. At the top, there's a navigation bar with links for Home, Chatter, Profile, Groups, Files, Leads, Accounts, Contacts (which is highlighted in purple), Opportunities, Reports, Dashboards, Products, Forecasts, Getting Started, and a plus sign for more. On the far right, it shows the user's name 'Ajay Gandhi', a Help & Training link, and a Sales tab.

The main content area is for a contact named 'Carole White'. It includes a profile picture, a 'Recent Items' sidebar with links to other contacts like Ajay Gandhi and leads like dress shirt, SurveyForce Sample Survey, 00001001, 00001002, and Jane Doe. There's also a 'Recycle Bin' section.

The contact details are as follows:

- Contact Detail:**
 - Contact Owner: Ajay Gandhi [Change]
 - Name: Carole White
 - Account Name: Global Media
 - Email Opt Out:
 - Title: VP Sales
- Address Information:**
 - Mailing Address: 150 Chestnut Street, Toronto, Ontario L4B 1Y3, Canada
 - Other Address: None listed.
- Additional Information:**

Fax		Lead Source	Employee Referral
Home Phone		Last Stay-In-Touch Request Date	
Other Phone		Last Stay-In-Touch Save Date	
Assistant		Birthday	
Asst. Phone		Department	
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	Last Modified By	Ajay Gandhi, 2/25/2013 3:36 PM
Custom Links	Google Search Yahoo! Weather	Google Maps	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.

Action	Field Label	Field Name	Data Type	Controlling Field	Track History
Edit	Account Name	Account	Lookup(Account)		
Edit	Asset	Asset	Lookup(Asset)	✓	
Edit	Business Hours	BusinessHours	Lookup(Business Hours)		
Edit	Case Number	CaseNumber	Auto Number		
Replace Edit	Case Origin	Origin	Picklist	✓	
Edit	Case Owner	Owner	Lookup(User.Queue)	✓	
Replace Edit	Case Reason	Reason	Picklist	✓	
Edit	Closed When Created	IsClosedOnCreate	Checkbox		
Edit	Contact Email	ContactEmail	Email		
Edit	Contact Fax	ContactFax	Phone		
Edit	Contact Mobile	ContactMobile	Phone		
Edit	Contact Name	Contact	Lookup(Contact)	✓	
Edit	Contact Phone	ContactPhone	Phone		
Edit	Created By	CreatedBy	Lookup(User)		
Edit	Date/Time Closed	ClosedDate	Date/Time		
Edit	Date/Time Opened	CreatedDate	Date/Time		
Edit	Description	Description	Long Text Area(32000)	✓	
Edit	Escalated	IsEscalated	Checkbox		
Edit	Internal Comments	Comments	Text Area(4000)		
Edit	Last Modified By	LastModifiedBy	Lookup(User)		
Edit	Parent Case	Parent	Lookup(Case)		
Replace Edit	Priority	Priority	Picklist	✓	
Edit	Status	Status	Picklist	✓	
Replace Edit	Subject	Subject	Text(255)	✓	
Edit	Type	Type	Picklist		
Edit	Web Company	SuppliedCompany	Text(80)		
Edit	Web Email	SuppliedEmail	Email		
Edit	Web Name	SuppliedName	Text(80)		
Edit	Web Phone	SuppliedPhone	Text(40)		

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.

Step 1. Choose the field type

Step 1 Next Cancel

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 checked="" 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.

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

Step 3. Enter formula Step 3 of 5

Help for this Page ?

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 Insert Field Insert Operator

--None-- -- No compatible field --

Quick Tips

- Getting Started
- Operators & Functions

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

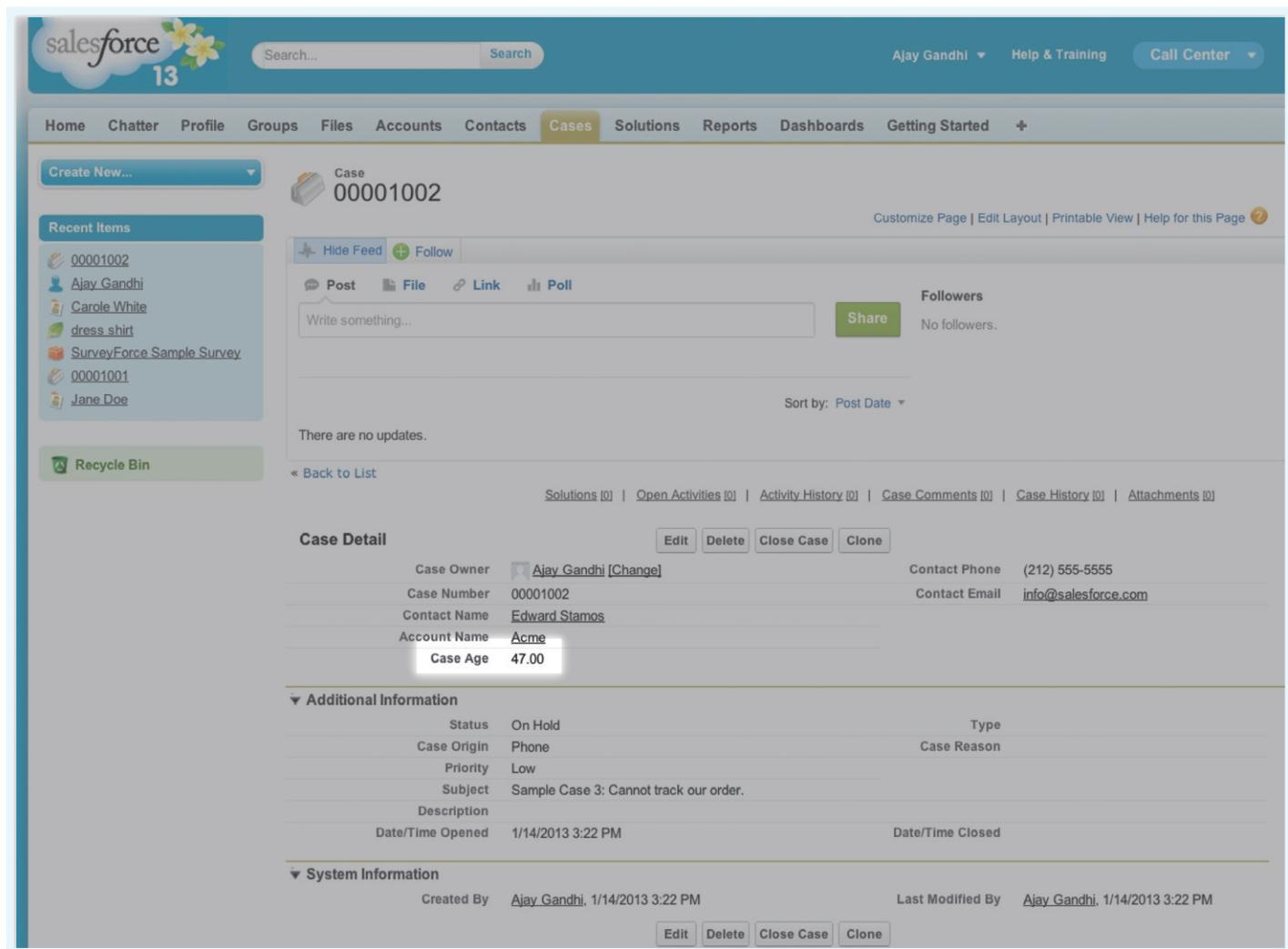
In this example, we will add a custom field called Case Age and use a formula to calculate how many days the case has been open.

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!



The screenshot shows the Salesforce Case detail page for Case 00001002. 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.), Description (Date/Time Opened: 1/14/2013 3:22 PM), Type (Case Reason), and Date/Time Closed. The System Information section shows Created By (Ajay Gandhi) and Last Modified By (Ajay Gandhi).

Case Detail	Additional Information	System Information
Case Owner: Ajay Gandhi [Change] Case Number: 00001002 Contact Name: Edward Stamos Account Name: Acme Case Age: 47.00	Status: On Hold Case Origin: Phone Priority: Low Subject: Sample Case 3: Cannot track our order. Description: Date/Time Opened: 1/14/2013 3:22 PM Type: Case Reason Date/Time Closed:	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.

The image displays two side-by-side screenshots of Salesforce dashboards. The left dashboard is titled "Sales Executive Dashboard" and the right one is titled "Service KPIs". Both dashboards are presented on a blue-themed interface with various charts, graphs, and summary tables.

Sales Executive Dashboard:

- Pipeline Growth:** A stacked bar chart showing pipeline growth by type (Existing Business, New Business) for January 2013.
- Big Deals:** Three summary tables for Closed Opportunities, Open Opportunities, and Lost Opportunities, each with columns for Opportunity Name and Sum of Amount.
- Closed Business:** A gauge chart titled "Actuals vs Target" showing the sum of amount in millions.
- Where's our business at this moment?**: A chart showing closed deals month over month.
- Trends for Won Opportunities:** A table showing won deals by leader board.
- Pipeline Next 90 days:** A chart showing pipeline created growth for current and previous quarter.
- Pipeline by Stage next 90 days:** A chart showing pipeline by product family.
- Pipeline by Product Family:** A bar chart showing pipeline by product family, with a note "Click to go to full \$0.0 report".

Service KPIs:

- Trend of Cases Created:** A chart showing record count over time.
- Trend of Cases Closed:** A chart showing record count over time.
- Trend of Case Resolution Time (Days):** A chart showing record count over time.
- Case Distribution by Support Channels:** A bar chart showing cases by phone.
- Case Distribution by Type:** A bar chart showing cases by type.
- Case Distribution by Priority:** A pie chart showing record count by priority (High, Low).
- Cases Closed MTD:** A gauge chart showing record count.
- Case Resolution Time MTD (Days):** A gauge chart showing average age.

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.

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.

The screenshot shows the Survey Force sample app interface on a Salesforce page. At the top, there's a navigation bar with links for Home, Getting Started, Surveys, Surveys Taken, Reports, and a plus sign. The 'Getting Started' tab is currently selected. On the left, there's a sidebar with sections for SurveyForce Sample Survey, ID 00001001, and user Jane Doe, along with a Recycle Bin button. The main content area has several sections: 'Welcome to Survey Force' (with a 'View Sample Survey' button), 'Additional Resources' (listing Installation Guide and User Guide), 'Getting Help' (mentioning Survey Force is unsupported and linking to Salesforce Answers and Survey Force on GitHub), and 'Community' (noting Survey Force is Open Source software). Callout boxes highlight the 'Getting Started tab' (pointing to the tab), 'Sample Survey' (pointing to the 'View Sample Survey' button), and 'Additional Resources' (pointing to the 'Installation Guide' link).

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 displays the Survey Force application within the Salesforce environment. The top navigation bar includes the Salesforce logo, a search bar, and user information (Ajay Gandhi). The main menu bar features Home, Getting Started, Surveys (which is selected), Surveys Taken, Reports, and a plus sign for new items. A sidebar on the left lists recent items such as 'SurveyForce Sample Survey', '00001002', 'Ajay Gandhi', 'Carole White', 'dress shirt', '00001001', and 'Jane Doe'. Below this is a 'Recycle Bin' section. The central content area is titled 'SurveyForce Sample Survey' and shows a 'Share My Survey' section with sharing options set to Chatter and a Chatter link provided. The survey itself consists of four questions:

- 1 Testing Question question0 (required)**
Options: one, two, three
- 2 Testing Question question1 (required)**
Options: four, five, six
- 3 Testing Question question2 (required)**
Options: seven, eight, nine
- 4 Testing Question question3 (required)**
A large text input field.

At the bottom of the survey form, there are settings for 'Answer as:' (with 'Anonymous' selected) 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.

Getting Started tab
Milestones PM has a Getting Started tab that walks you through the steps to create your first project to track.

Welcome to Milestones PM - Project Management

Next Steps
Your next few steps are easy.

1. Initialize your configuration using the button below. [Click here to initialize this app](#)
2. View the "Getting Started" project created as part of your initial configuration.
3. Start creating your first project.

Getting Help
Milestones PM is unsupported. For community assistance with Milestones PM, please visit [Salesforce Answers](#). To submit ideas or issues, please visit [Milestones PM on Github](#).

Community
Milestones PM is Open Source software. We welcome your issue reports, ideas, documentation, code tweaks and all other participation. [Learn more...](#)

Initial Project
A project wizard installs a sample project with preconfigured data that guides you on how to use the reporting and dashboards that come with the app.

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**

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

Project Detail

Project Name: HOWTO: Get Started with Milestones PM
Status: Active
Owner: Admin User (Chantal)
Kickoff: 1/2/2010
Deadline: 12/2/2010

Description: The sample project contains milestones and tasks designed to help you understand how to get the most out of Milestones PM.

Status at a Glance

Category	Value
Open Tasks	15
Late Tasks	2
Blocked Tasks	0

Task Analysis

Task Status	Count
Open Tasks	15
Complete Tasks	3

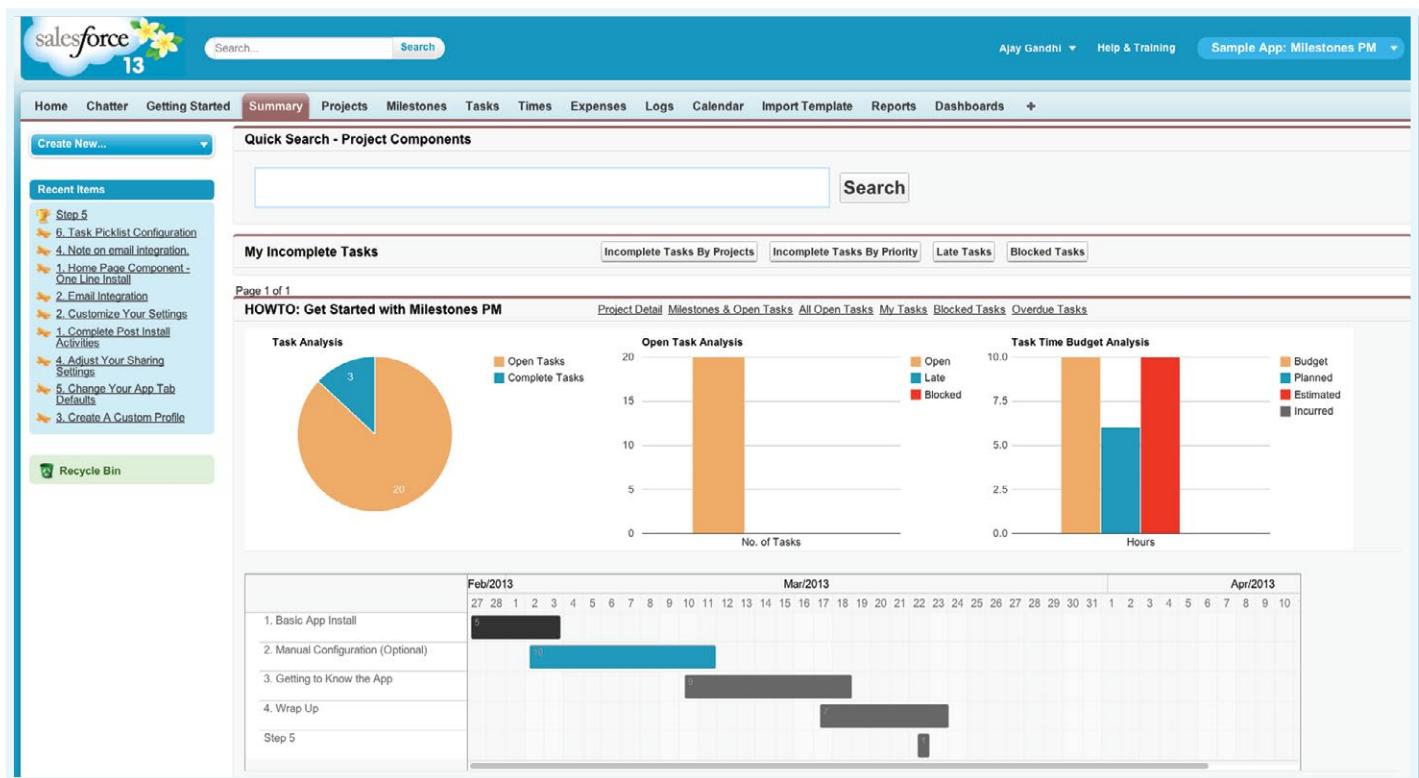
Hours Summary (chart)

Task Time Budget Analysis

Expense Summary

Task Expense Budget Analysis

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.