

Salesforce Certified Admin and App Builder

Lesson 1—Salesforce Overview



What You'll Learn

- Customizing the home page by adding and removing components
- Creating custom tabs and app
- Uploading a company logo to brand Salesforce
- Exploring the System Overview page
- Updating the fiscal year and business hours



Introduction to Salesforce



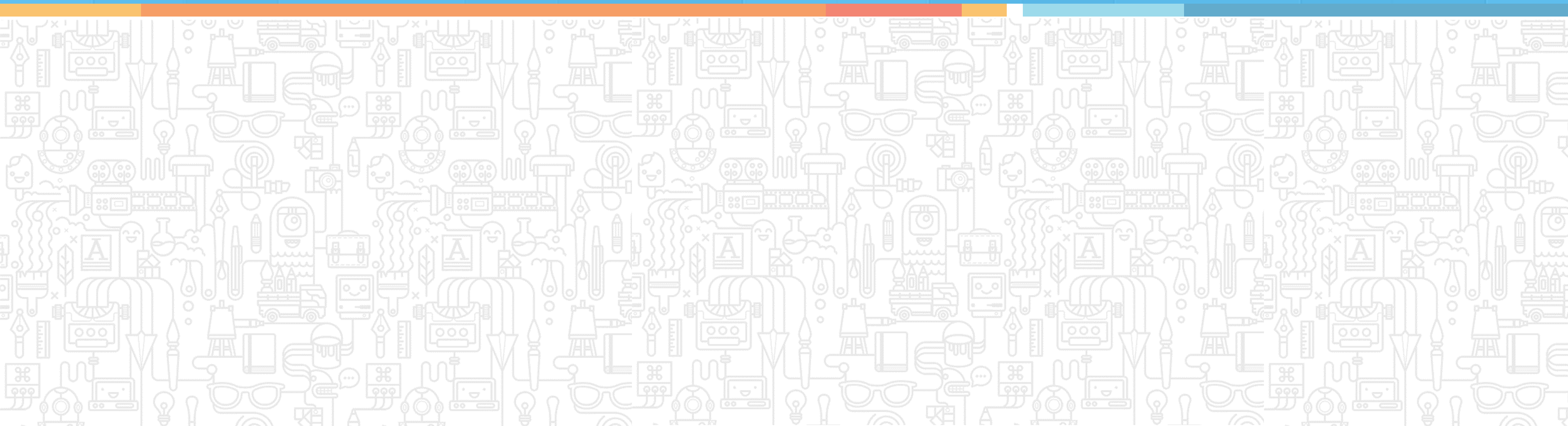
Salesforce is a web-based CRM that allows users to log in from anywhere with an internet connection and browser.

The common use-cases for Salesforce include:

- Tracking business development activities of salespeople
- Reporting on customer interactions through case management
- Reporting on the effectiveness of marketing initiatives
- Collaborating between employees, partners, and customers



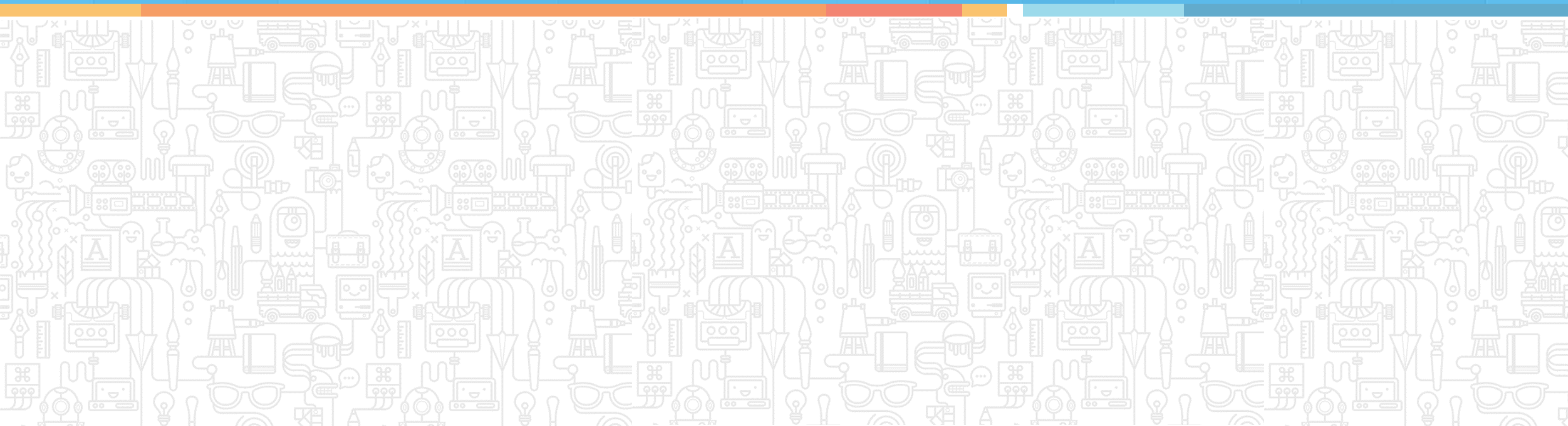
Salesforce Editions



The different editions of Salesforce are:

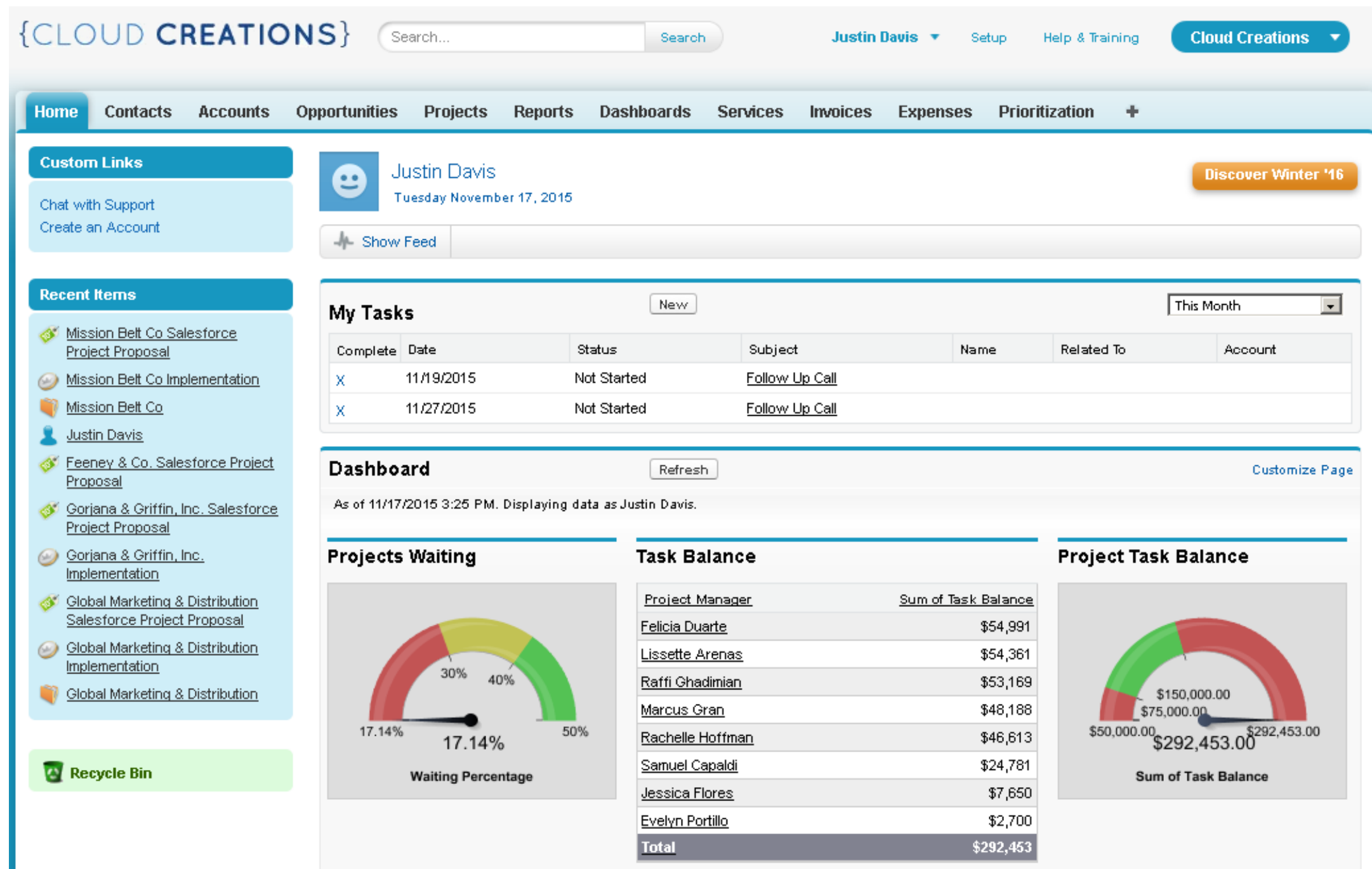
| Professional | Enterprise | Unlimited |
|---|--|---|
| Complete CRM for any size team | MOST POPULAR Deeply customizable CRM for your business | Unlimited CRM power and support |
| \$65 /user/month* (billed annually) | \$125 /user/month* (billed annually) | \$250 /user/month* (billed annually) |
| TRY FOR FREE | TRY FOR FREE | TRY FOR FREE |
| Account and contact management Opportunity tracking Lead management Task and event tracking Customizable reports and dashboards Mobile access and administration | Get all Professional features PLUS Workflow automation Enterprise territory management Profiles and page layouts | Get all Enterprise features PLUS Unlimited customizations Unlimited custom apps Multiple sandboxes Additional data storage |
| Professional Edition | Enterprise Edition | Unlimited Edition |

Home Page Customization



The different features of the Home Page are as follows:

- It is the starting point for all Salesforce Users.
- This page is used to manage open and incomplete tasks.
- You can view upcoming events from this screen.
- You can also view dashboard snapshots.



The screenshot displays the Salesforce Home Page for user Justin Davis. The interface includes a top navigation bar with the {CLOUD CREATIONS} logo, a search bar, and user information. Below this is a secondary navigation bar with tabs for Home, Contacts, Accounts, Opportunities, Projects, Reports, Dashboards, Services, Invoices, Expenses, and Prioritization. The main content area is divided into several sections:

- Custom Links:** Includes links for "Chat with Support" and "Create an Account".
- Recent Items:** A list of recent items such as "Mission Belt Co Salesforce Project Proposal", "Mission Belt Co Implementation", "Justin Davis", "Feeney & Co. Salesforce Project Proposal", "Gorjana & Griffin, Inc. Salesforce Project Proposal", "Gorjana & Griffin, Inc. Implementation", "Global Marketing & Distribution Salesforce Project Proposal", "Global Marketing & Distribution Implementation", and "Global Marketing & Distribution".
- My Tasks:** A table showing tasks with columns for Complete, Date, Status, Subject, Name, Related To, and Account. It includes a "New" button and a "This Month" filter.
- Dashboard:** A section with a "Refresh" button and a "Customize Page" link. It contains three sub-sections:
 - Projects Waiting:** A gauge chart showing a waiting percentage of 17.14%.
 - Task Balance:** A table listing project managers and their sum of task balance.
 - Project Task Balance:** A gauge chart showing a sum of task balance of \$292,453.00.
- Recycle Bin:** A green button located at the bottom left of the main content area.

| Complete | Date | Status | Subject | Name | Related To | Account |
|----------|------------|-------------|----------------|------|------------|---------|
| X | 11/19/2015 | Not Started | Follow Up Call | | | |
| X | 11/27/2015 | Not Started | Follow Up Call | | | |

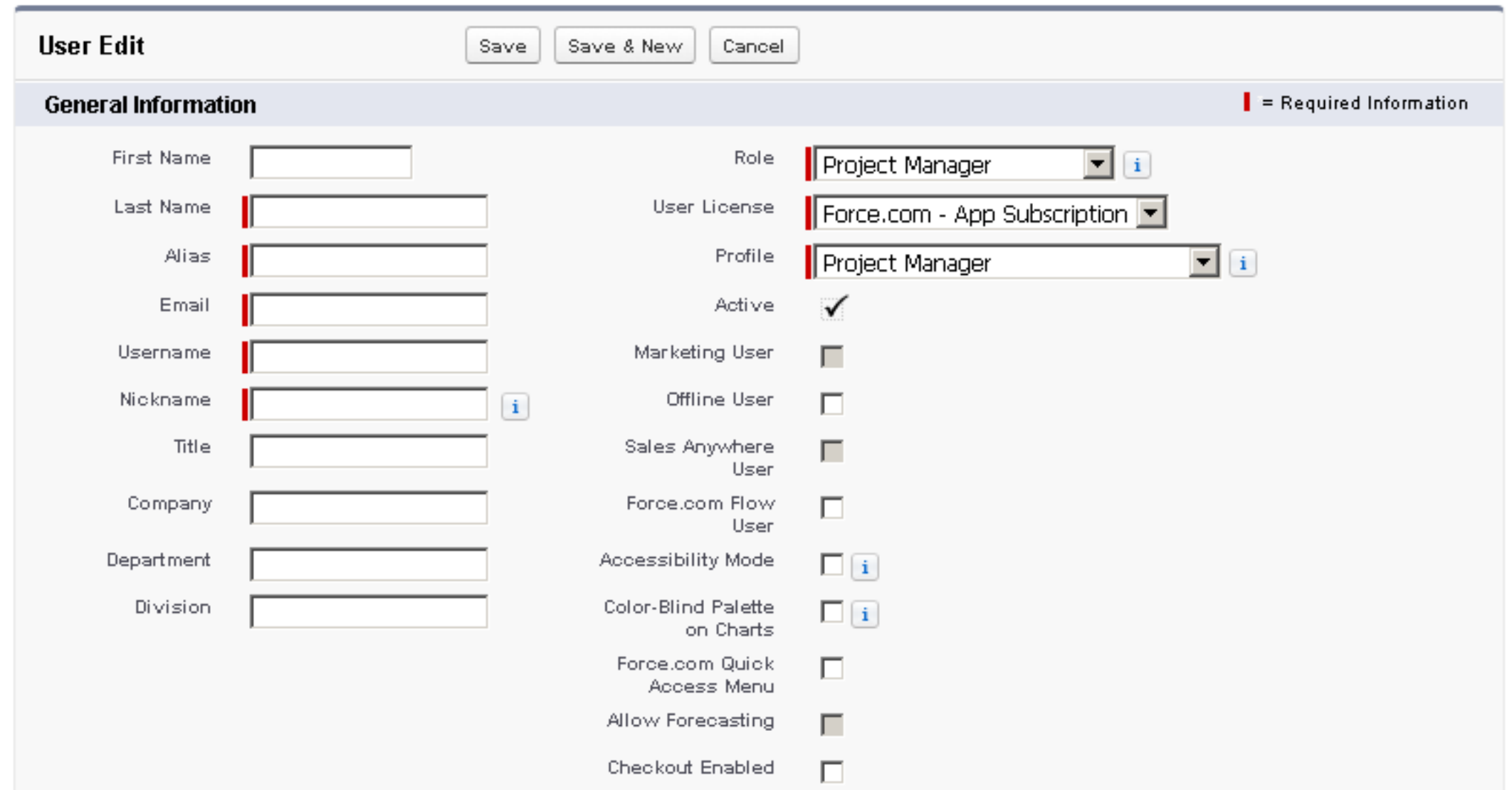
| Project Manager | Sum of Task Balance |
|------------------|---------------------|
| Felicia Duarte | \$54,991 |
| Lisette Arenas | \$54,361 |
| Raffi Ghadimian | \$53,169 |
| Marcus Gran | \$48,188 |
| Rachelle Hoffman | \$46,613 |
| Samuel Capaldi | \$24,781 |
| Jessica Flores | \$7,650 |
| Evelyn Portillo | \$2,700 |
| Total | \$292,453 |

User Management



Following are the key points to remember while managing user:

- Users must be assigned an active license
- Usernames must be unique and in email format
- Users must be assigned a profile
- Reassign user licenses



The screenshot shows a 'User Edit' form with a header bar containing 'Save', 'Save & New', and 'Cancel' buttons. Below the header is a 'General Information' section. The form is divided into two columns. The left column contains text input fields for 'First Name', 'Last Name', 'Alias', 'Email', 'Username', 'Nickname', 'Title', 'Company', 'Department', and 'Division'. The right column contains dropdown menus for 'Role' (set to 'Project Manager'), 'User License' (set to 'Force.com - App Subscription'), and 'Profile' (set to 'Project Manager'). Below these are several checkboxes: 'Active' (checked), 'Marketing User', 'Offline User', 'Sales Anywhere User', 'Force.com Flow User', 'Accessibility Mode', 'Color-Blind Palette on Charts', 'Force.com Quick Access Menu', 'Allow Forecasting', and 'Checkout Enabled'. A legend in the top right corner indicates that a red vertical bar next to a field name signifies 'Required Information'.

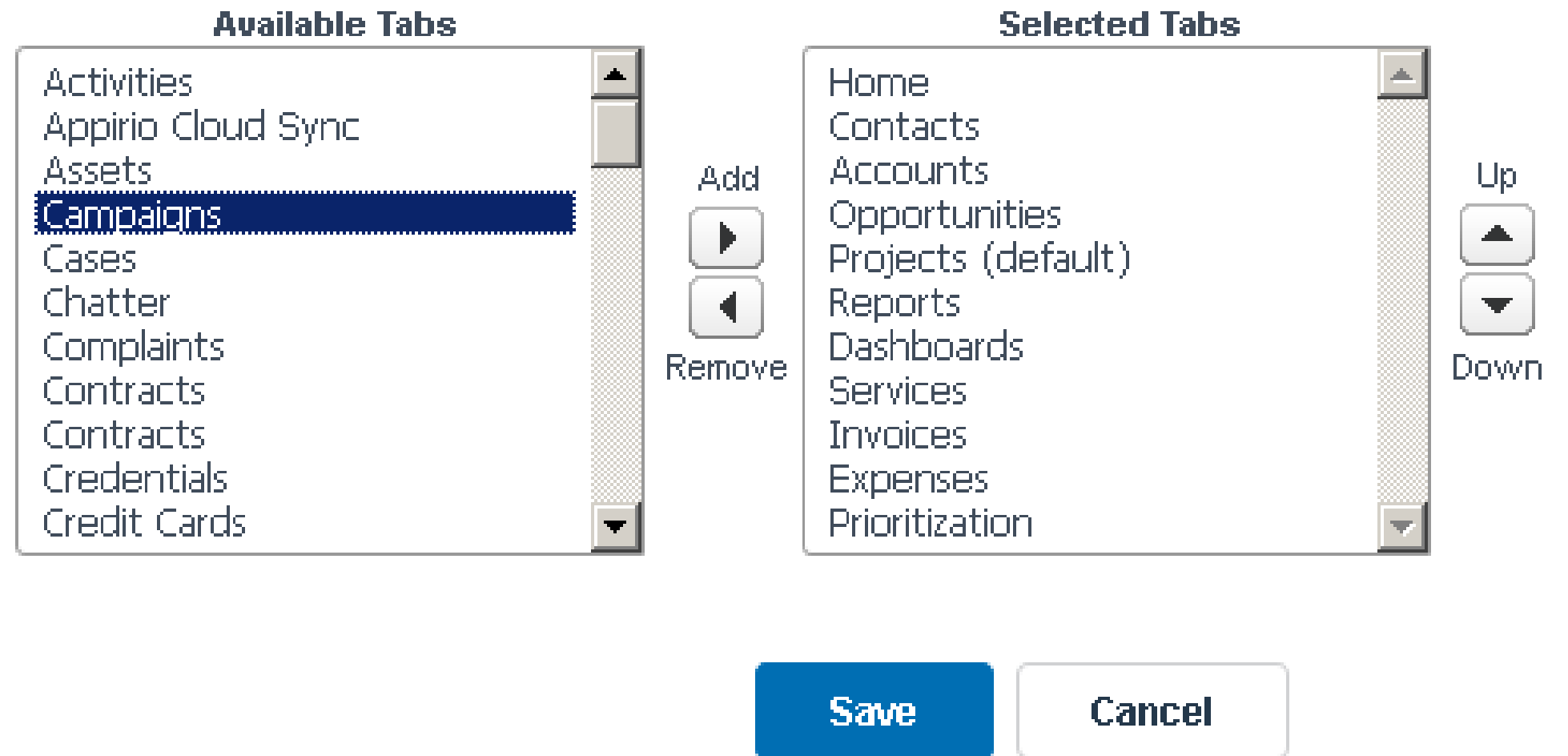
| User Edit | |
|-------------------------------|---|
| General Information | |
| First Name | <input type="text"/> |
| Last Name | <input type="text"/> |
| Alias | <input type="text"/> |
| Email | <input type="text"/> |
| Username | <input type="text"/> |
| Nickname | <input type="text"/> |
| Title | <input type="text"/> |
| Company | <input type="text"/> |
| Department | <input type="text"/> |
| Division | <input type="text"/> |
| Role | <input type="text" value="Project Manager"/> |
| User License | <input type="text" value="Force.com - App Subscription"/> |
| Profile | <input type="text" value="Project Manager"/> |
| Active | <input checked="" type="checkbox"/> |
| Marketing User | <input type="checkbox"/> |
| Offline User | <input type="checkbox"/> |
| Sales Anywhere User | <input type="checkbox"/> |
| Force.com Flow User | <input type="checkbox"/> |
| Accessibility Mode | <input type="checkbox"/> |
| Color-Blind Palette on Charts | <input type="checkbox"/> |
| Force.com Quick Access Menu | <input type="checkbox"/> |
| Allow Forecasting | <input type="checkbox"/> |
| Checkout Enabled | <input type="checkbox"/> |

Creating and Customizing Tabs



Following are the main points to remember in custom tabs:

- Tabs can be added or removed by individual users.
- Web tabs can be added to access commonly requested sites.
- Tabs can be created to display Visualforce pages.



The screenshot displays the 'Custom Tabs' configuration window. It features two main panels: 'Available Tabs' on the left and 'Selected Tabs' on the right. The 'Available Tabs' panel contains a list of tabs: Activities, Appirio Cloud Sync, Assets, Campaigns (highlighted), Cases, Chatter, Complaints, Contracts, Contracts, Credentials, and Credit Cards. The 'Selected Tabs' panel contains a list of tabs: Home, Contacts, Accounts, Opportunities, Projects (default), Reports, Dashboards, Services, Invoices, Expenses, and Prioritization. Between the two panels are 'Add' and 'Remove' buttons. To the right of the 'Selected Tabs' panel are 'Up' and 'Down' buttons. At the bottom of the window are 'Save' and 'Cancel' buttons.

| Available Tabs | Selected Tabs |
|--------------------|--------------------|
| Activities | Home |
| Appirio Cloud Sync | Contacts |
| Assets | Accounts |
| Campaigns | Opportunities |
| Cases | Projects (default) |
| Chatter | Reports |
| Complaints | Dashboards |
| Contracts | Services |
| Contracts | Invoices |
| Credentials | Expenses |
| Credit Cards | Prioritization |

Creating an App







Following are the main points to remember while creating an app:

- Access common features
- Organize tabs in a logical manner
- Create a customizable application

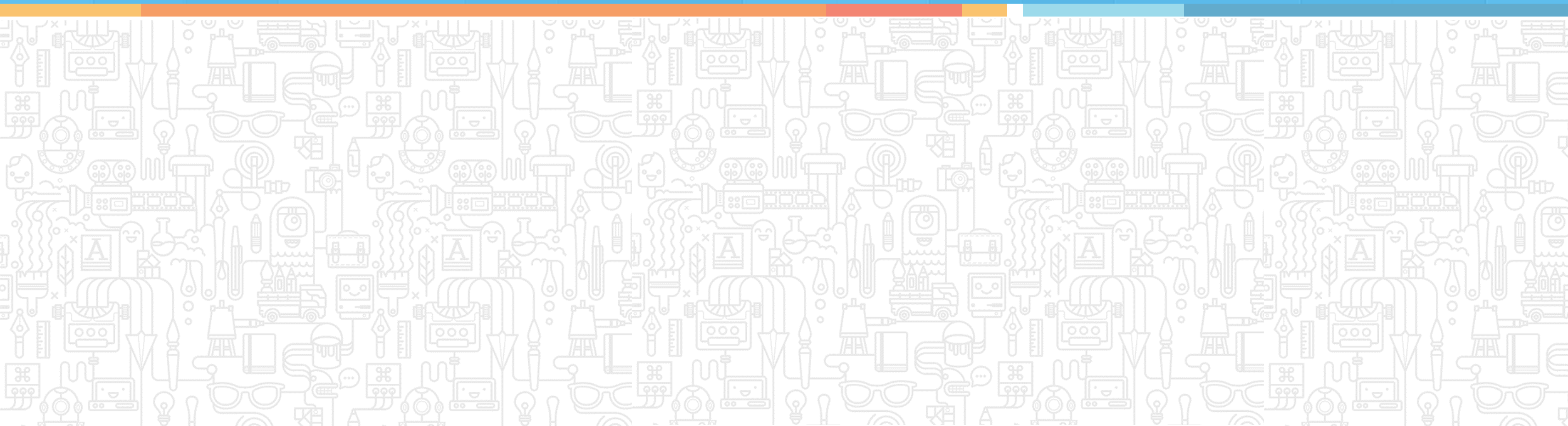
Apps

Quick StartNewReorder

Apps Help ?

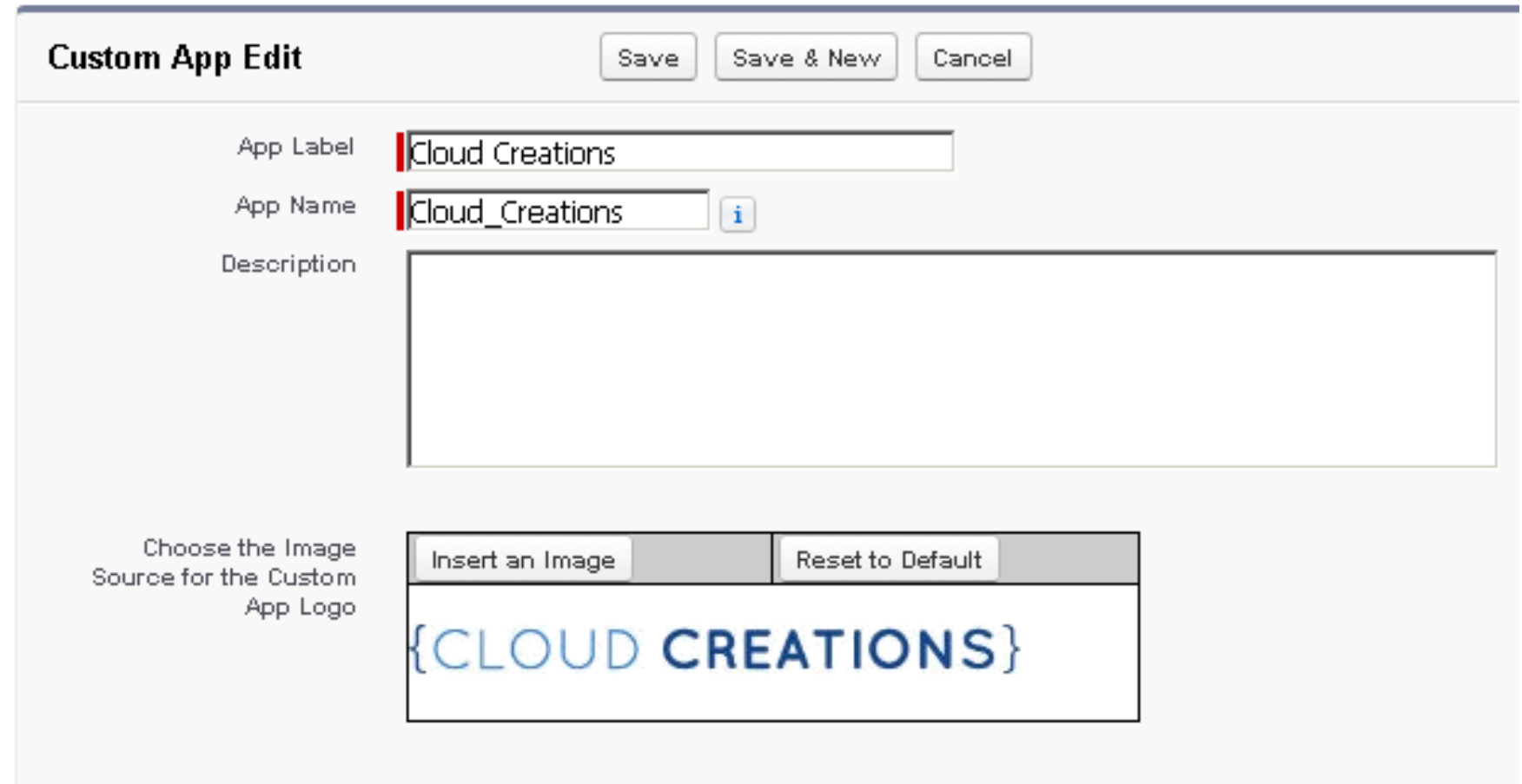
| Action | App Label | Installed Package | Custom | Description |
|--|---|---|-------------------------------------|---|
| Edit | All Tabs | | <input type="checkbox"/> | |
| Edit Del |  Appirio Cloud Sync | Appirio Cloud Sync | <input checked="" type="checkbox"/> | Appirio Cloud Sync lets you configure two-way synchronization between your Google calendar and contact list, and your Salesforce.com calendar and contacts. |
| Edit | Call Center | | <input type="checkbox"/> | State-of-the-Art On-Demand Customer Service |
| Edit Del | Cloud Creations | | <input checked="" type="checkbox"/> | |
| Edit | Community | | <input type="checkbox"/> | Salesforce CRM Communities |
| Edit | Environment Hub | | <input type="checkbox"/> | The Environment Hub lets you view, connect, and access all your organizations from one location. This simplifies managing multiple organizations for business, development, and testing. |
| Edit Del | Executive | | <input checked="" type="checkbox"/> | |
| Edit Del | External | | <input checked="" type="checkbox"/> | |
| Edit Del |  License Management App | License Management App | <input checked="" type="checkbox"/> | License Manager tracks the installs of your packages and allows you to manage the licenses for them. You can also access detailed insight about your subscribers and troubleshoot issues. |
| Edit | Marketing | | <input type="checkbox"/> | Best-in-class on-demand marketing automation |
| Edit Del |  Partner Order | SFDC Channel Order | <input checked="" type="checkbox"/> | |
| Edit | Platform | | <input type="checkbox"/> | The fundamental Force.com platform |
| Edit | Sales | | <input type="checkbox"/> | The world's most popular sales force automation (SFA) solution |
| Edit | Salesforce Chatter | | <input type="checkbox"/> | The Salesforce Chatter social network, including profiles and feeds |
| Edit Del |  Salesforce for Google AdWords | Salesforce for Google AdWords | <input checked="" type="checkbox"/> | Provides Google AdWords and Web-to-Lead tracking capability. Understand which keywords, ads, campaigns, and landing pages are generating results for your company. |

Uploading a Company Logo



Following are the main points to remember while uploading company logo:

- Logo formatting
- Uploading a logo to Documents
- Assign a logo to an App

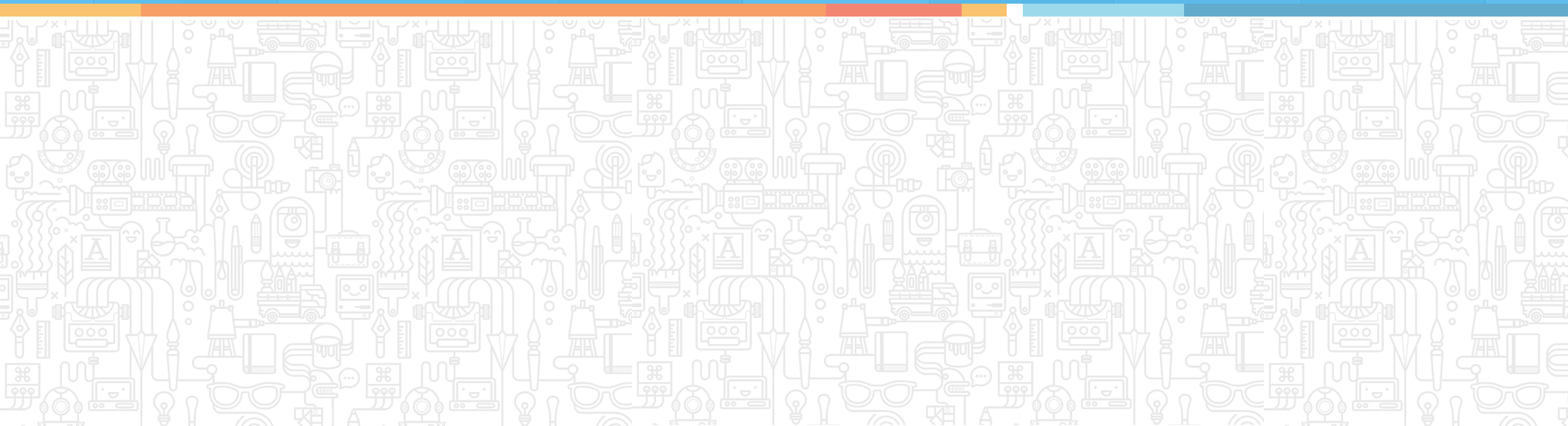


The screenshot shows a 'Custom App Edit' dialog box with the following fields and controls:

- App Label:** A text input field containing 'Cloud Creations'.
- App Name:** A text input field containing 'Cloud_Creations' with an information icon (i) to its right.
- Description:** A large, empty text area.
- Choose the Image Source for the Custom App Logo:** A section containing two buttons: 'Insert an Image' and 'Reset to Default'.
- Image Preview:** A rectangular area below the buttons showing a placeholder logo with the text '{CLOUD CREATIONS}' in blue.

At the top right of the dialog box, there are three buttons: 'Save', 'Save & New', and 'Cancel'.

Company Information Page



Following are the main points to remember in the company information page:

- View data and file storage
- View number of active licenses available
- Update organizational details
- View Permission Sets

Company Information

Cloud Creations, Inc.

[Help for this Page](#) ?

The organization's profile is below.

Organization Detail

[Edit](#)

| | | | |
|---|--|--|---|
| Organization Name | Cloud Creations, Inc. | Phone | (213) 309-6986 |
| Primary Contact | Justin Davis | Fax | |
| Division | Management | Default Locale | English (United States) |
| Address | 130 Cook Ave Suite 101 Pasadena, CA 91107 US | Default Language | English |
| Fiscal Year Starts In | January | Default Time Zone | (GMT-08:00) Pacific Standard Time (America/Los_Angeles) |
| Allow Support to Activate Multiple Currencies | <input type="checkbox"/> | Currency Locale | English (United States) - USD |
| Newsletter | <input type="checkbox"/> | Used Data Space | 76.6 MB (7%) View |
| Admin Newsletter | <input type="checkbox"/> | Used File Space | 231.8 MB (0%) View |
| Hide Notices About System Maintenance | <input checked="" type="checkbox"/> | API Requests, Last 24 Hours | 350 (15,000 max) |
| Hide Notices About System Downtime | <input checked="" type="checkbox"/> | Streaming API Events, Last 24 Hours | 0 (200,000 max) |
| | | Restricted Logins, Current Month | 0 (0 max) |
| | | Salesforce.com Organization ID | 00Dj000000029pDm |
| | | Environment Hub Org Id | 00Dj000000029pDm : Cloud Creations, Inc. |
| Created By Justin Davis , 3/15/2015 1:26 PM | | Modified By Justin Davis , 10/23/2015 10:14 AM | |

[Edit](#)

User Licenses

[Buy More Licenses](#)

[User Licenses Help](#) ?

| Name | Status | Total Licenses | Used Licenses | Remaining Licenses | Expiration Date |
|------------------------------|--------|----------------|---------------|--------------------|-----------------|
| Force.com - App Subscription | Active | 14 | 11 | 3 | 5/19/2016 |
| Salesforce | Active | 3 | 3 | 0 | 5/19/2016 |
| Chatter Free | Active | 5,000 | 0 | 5,000 | 5/19/2016 |
| Chatter External | Active | 500 | 0 | 500 | 5/19/2016 |

System Overview Page



In the System Overview page, you can

view the number of

- custom objects
- workflow rules and custom tabs
- apex classes and API requests
- custom apps

System Overview

Force.com System Overview shows you important usage data and limits about your organization. For complete usage limits, See [Editions and Limits](#).

[Help for this Page](#) ?

[Configure Force.com Messages](#)

Schema

| | |
|----------------------------------|------------------------|
| CUSTOM OBJECTS i | <div><div></div></div> |
| 19 | 9%(maximum 200) |
| CUSTOM SETTING i | |
| 1 | |
| DATA STORAGE i | <div><div></div></div> |
| 76.6 MB (Approx.) | 7%(maximum 1.0 GB) |

API Usage

| | |
|-----------------------------|------------------------|
| API REQUESTS, LAST 24 HOURS | <div><div></div></div> |
| 350 | 2%(maximum 15,000) |

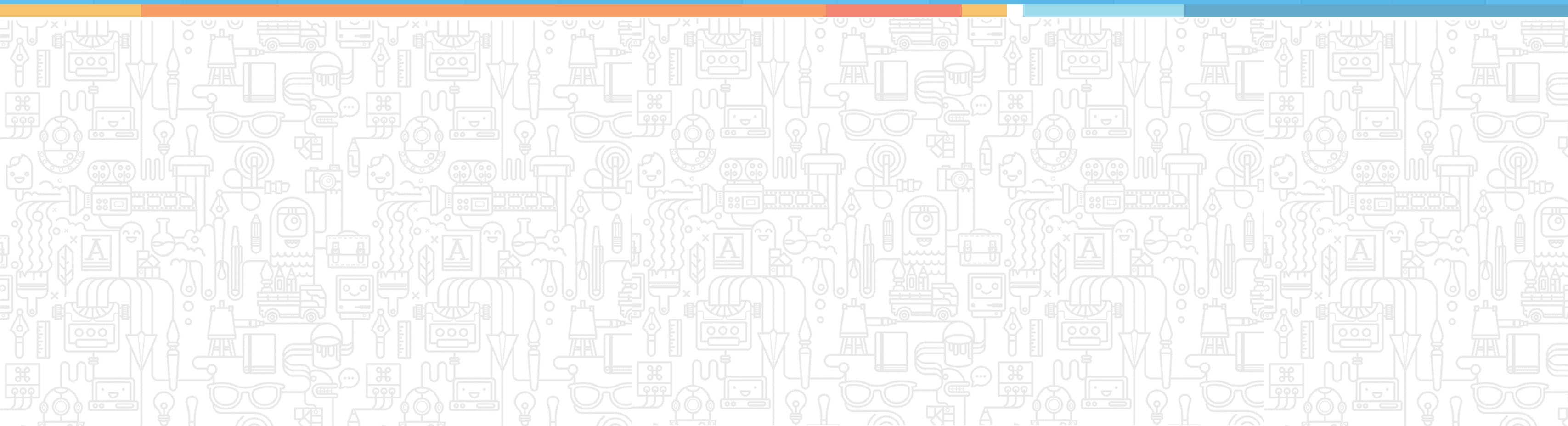
Business Logic

| | |
|-----------------------------|------------------------------------|
| RULES | <div><div></div></div> |
| 68 | 3%(maximum 2,000) |
| APEX TRIGGERS | |
| 8 | |
| APEX CLASSES | |
| 103 | |
| CODE USED i | <div><div></div></div> |
| 1.53% | 1%(45,976 of 3,000,000 characters) |

User Interface

| | |
|------------------------|------------------------|
| CUSTOM APPS | <div><div></div></div> |
| 3 | 10%(maximum 30) |
| ACTIVE FORCE.COM SITES | <div><div></div></div> |
| 2 | 8%(maximum 25) |
| ACTIVE FLOWS | <div><div></div></div> |
| 0 | 0%(maximum 500) |
| CUSTOM TABS | <div><div></div></div> |
| 25 | 27%(maximum 90) |
| VISUALFORCE PAGES | |
| 39 | |

Updating the Fiscal Year



In the Fiscal Year Information page, you can

- assign a start and end month to your company and
- update Business hours for routing logic.

Setup

Organization Fiscal Year Edit: Cloud Creations, Inc.

[Help for this Page](#) ?


To specify the fiscal year type for your organization, choose one of the options below.

☒ **Standard Fiscal Year** [i](#)

☐ **Custom Fiscal Year** [i](#)

Fiscal Year Information

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2015 and ends in March 2016, your Fiscal Year setting can be either 2015 or 2016.

 If your forecast period is set to quarterly, changing your fiscal year start month will delete existing forecast adjustments and quotas.

Change Fiscal Year Period

Save

Cancel

Name Cloud Creations, Inc.

Fiscal Year Start Month **January**

Fiscal Year is Based On
☒ The ending month
☐ The starting month

Save

Cancel



QUIZ

1

Which of the following options is **not** a valid Salesforce Edition?

- a. Professional
- b. Premium
- c. Enterprise
- d. Unlimited



QUIZ

1

Which of the following options is **not** a valid Salesforce Edition?

- a. Professional
- b. Premium
- c. Enterprise
- d. Unlimited



The correct answer is **b**.

There is no Premium Edition of Salesforce.

QUIZ

2

Which component **can't** be added to the home page?

- a. Tasks
- b. Calendar
- c. Items to Approve
- d. Workflow Rules



QUIZ

2

Which component **can't** be added to the home page?

- a. Tasks
- b. Calendar
- c. Items to Approve
- d. Workflow Rules



The correct answer is **d**.

You can't add Workflow Rules to the Salesforce home page.

QUIZ 3

What is the significance of the fiscal year setting?

- a. It affects the time zone setting.
- b. It affects the language setting.
- c. It affects financial transactions.
- d. None of the above



QUIZ

3

What is the significance of the fiscal year setting?

- a. It affects the time zone setting.
- b. It affects the language setting.
- c. It affects financial transactions.
- d. None of the above



The correct answer is **c**.

Fiscal settings can affect financial transactions.

QUIZ

4

Which of the following fields is **not** required to create a new User?

- a. Department
- b. First Name
- c. Last Name
- d. Email



QUIZ

4

Which of the following fields is **not** required to create a new User?

- a. Department
- b. First Name
- c. Last Name
- d. Email



The correct answer is **a**.

The Department field is not required to create a new User.

QUIZ

5

What information can you find on the Company Information page?

- a. Used Data Space
- b. Number of Reports
- c. Installed Applications
- d. Apex License



QUIZ

5

What information can you find on the Company Information page?

- a. Used Data Space
- b. Number of Reports
- c. Installed Applications
- d. Apex License



The correct answer is **a**.

Only used data space can be found on the company information page.



Case Study

Scenario

Analysis

Solution

United Containers manufactures shipping containers and sells them around the world. They need to select a CRM system that supports their business requirements, which includes sales and marketing activity management and reporting. They have been using a proprietary application built on a SQL server, and are in need of a cloud-based solution. Users are frustrated at the lack of mobile access, as well as access while traveling to visit customers. There is a need for automated emails, as well as managing wholesale vs. retail orders. One of the IT managers mentioned she implemented Salesforce at a previous company, and recommended the United Containers executives to research a Salesforce solution. United Containers decided to research which edition of Salesforce would suit them best.

Scenario

Analysis

Solution

Enterprise Edition was determined to be the best solution because it can create:

1. workflow rules for sending automated email alerts.
2. record types for segmenting out field requirements on sales types.
3. a sandbox for testing customizations prior to deployment.

Scenario

Analysis

Solution

The following steps were taken by United Containers to solve their issues:

1. Email templates were created with merge fields
2. Workflow Rules were created to send email notifications
3. Record types on Opportunities were created for segmenting retail and wholesale records
4. Created a new Developer sandbox
5. Activated and enabled the sandbox

Key Takeaways

- Salesforce is a web-based customer relationship management software that allows users to log in from anywhere with an internet connection and browser.
- Salesforce offers a wide range of products suited for each organization.
- The Home Page consists of the sidebar and main area.
- Users need to be assigned an active license.



This concludes 'Salesforce Overview.'

The next Lesson is 'Sales Cloud.'