Admin Workshop
Lesson 4

Content, Libraries, Files & Knowledge
Leads / Cases / Activity Management
Organization Set-up
Global User Interface User Set-up
Data Migration

Capgemini

Objective

- Content, Libraries, Files , Knowledge & Solutions
- Leads / Campaigns / Price Books
- Case Processes, Web to Case & Email to Case
- Activity Management
- Organization Set-up (Fiscal Year, Business Hours, Currency Management)
- Global User Interface
- User Set-up
- Data Migration (Data Loader and Import Wizard)

Build Your App

1. *Identify Your Use Case*
2. *Design Your Schema (in org if possible)*
3. *Present Your Solution & Demo (white board OR in org)*

- Understand and encapsulate the requirement (s) AKA the "Pain Points" - In this case they are more self made, but it is important to do this to keep a "holy grail" of initial requirements to refer back to.
- Start high level, move more specific - Begin to mentally map out the data model. This is before any "real mapping" comes into play. Doing this helps decide custom objects or standard functionality. Without actually creating things you can start visualizing workflows or necessary validations to account for major items in #1.
- Start the mapping Process - This is where the real "fun" begins. Start with the central objects and work from there. Walk through the mapping without fields but with concepts built upon #1 and #2.
- Build the foundation - Start building the primary objects. Focus more on the relationships for now. Walk through the relationships as a user would.
- Add the fist layer of Paint - Add all necessary fields and configuration that can meet the "lowest hanging fruit" requirementsl. Add the Plumbing
- Start constructing the workflows and validations or anything that helps consists of a "process". This may be a slight back and forth between #1 and #5 to hit the harder pain points with the most efficient process.
- Install the Security systems - Now that you have an app to walk through, begin to think about and visualize user experience. This includes what users should and should not see. Profiles, OWD and basic user settings all can be set up.
- Add the Polish - Start to log in and walk through the process – specifically the pain points Note page layouts, related list columns, search filters, tab columns, etc

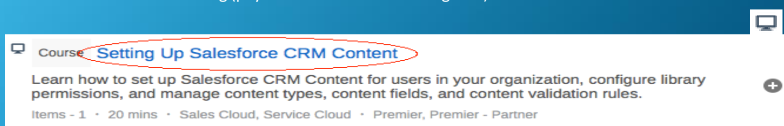
Content, Libraries & Files

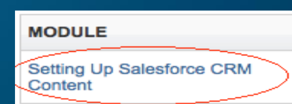
Video: Setting Up Salesforce CRM Content

Learn how to set up Salesforce CRM Content for users in your organization, configure library permissions, and manage content types, content fields, and content validation rules. (20 min)

How to Get to this training video ?

- You need an **@partnertraining.com account**.
- If you don't have this account and you work for a Salesforce partner, you need to request an invite from the partner admin in your company to the partner community. Once you have the partner community access you can create a partner training login = xxxx@partnertraining.com
- To avoid a mixup with saved credentials open a private window in a new browsr.
- Browse to http://help.salesforce.com and log in with your @partnertraining.com account.
- Search for "Setting Up Salesforce CRM Content"
- Make sure to select this training (pay attention to the video logo):





- Select the module "Setting Up Salesforce CRM Contente":
- Enjoy the 20 min video.
- Direct Link: (only works after you've logged in with your @partnertraining.com account, paste in browser) https://help.salesforce.com/HTTrainingModulesDetail?courseId=a1S30000000givgEAA

What is Salesforce CRM Content

DEFINITION:

Salesforce CRM Content is an integrated content management system.

ALERT:

Files cannot exceed 2GB in size.

Components of salesforce CRM Content

Content	▪ Documents, files, Google Docs, URLs, images ▪ Contribute on the Libraries tab
Libraries	▪ Contain related content ▪ Members contribute
Content Fields	▪ Display information about contributed content
Content Types	▪ Control fields on content detail page ▪ Selected during upload
Content Packs	▪ Content that is bundled together ▪ Updated to reflect changes
Content Deliveries	▪ View delivered content in Web browser ▪ Track views and downloads

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Configuring Salesforce CRM Content Settings

- ✓ Enable Salesforce CRM Content
- ✓ Autoassign feature licenses to existing and new users
- ✓ Files user interface allows sharing files with libraries
- ✓ Enable multilanguage search and contribute
- ✓ Enable content pack creation
- ✓ Enable enhanced document viewer
- ✓ Show Salesforce Files in Salesforce CRM Content

Videos – from YouTube

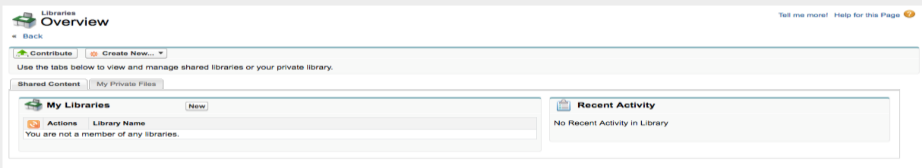
Salesforce Content/Libraries Overview - https://www.youtube.com/watch?v=f2hkk1m_A0w

Salesforce: Content/Library Permissions https://www.youtube.com/watch?v=i_ij-cVw9ck

Salesforce: Content Delivery https://www.youtube.com/watch?v=3ZhnvS3iz84

Salesforce Content & Libraries

- Organize, share, search, and manage content within your organization and across key areas of the Salesforce application.
- Includes all file types (i.e. Microsoft® PowerPoint , audio & video files, Web pages, and Google® docs.



- Users are given access to Libraries
- Users can subscribe to content
- Users can preview content without downloading
- Contributors can tag content
- Attach content to Accounts, Contacts, Campaigns, Leads, Opps, Products & Custom Objects

Videos & Release Content for Files

- Salesforce Files Synch https://www.youtube.com/watch?v=eijbT7L_yKY
- Salesforce CRM Content Implemenation Guidehttps://org62.my.salesforce.com/help/pdfs/en/salesforce_content_implementation_guide.pdf
- Salesforce Files Demo 2 mins https://www.youtube.com/watch?v=9lO0wqwn6eM
- Salesforce Files Summer’16 Release Readiness https://www.youtube.com/watch?v=IBZXCGhWTeA

Salesforce Files

Integrated into the Flow of Business

- Salesforce Files places files where employees need them most — in project groups or attached to account records, marketing campaigns, or service cases.

Synched and Mobile

- With Salesforce Files, you stay in lockstep with your team on all of your devices, no matter where you are. Files are securely synced across any mobile device, ensuring that files are accurate, up to date, and accessible from any location.

Always Secure, Always Available

- Built on the Salesforce1 Platform, Salesforce Files is 100% enterprise ready and completely secure. Now you can engage with all of your files, from any device.

Files Summary

Any file you own and have access to is available to share or attach to posts or comments on Chatter feeds

All file types are supported, including everything from Microsoft® PowerPoint presentations and Excel spreadsheets, to Adobe® PDFs, image files, audio files, and video files. Files up to 2 GB can be uploaded by default. Maximum file size is determined by your organization.

Files are automatically added to the Files list when:

- You upload a file.
- You or someone else attaches a file to a Chatter feed or comment. This includes files attached to all public groups, whether you're a member or not, and private groups you're a member of, but not private groups you're not a member of.
- You sync a file in your Salesforce Files folder.
- Someone else shares a file privately with you using the Sharing dialog box.
- You upload a file to a Salesforce CRM Content library.
- Someone else uploads a file to a library you're a member of.
- You or someone else creates a content pack or uploads a Web link in Salesforce CRM Content. You only see files from content packs and Web links you have access to.

Knowledge

Videos - Knowledge

Knowledge - Service Cloud Demo - Intro (2 min)

https://www.youtube.com/watch?v=d3jD25SNp6g

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Salesforce Knowledge Overview

Knowledge:
- Provides targeted search results.
- Serves every channel.
- Empowers users to leverage the experience of peers and customers.

Support Agents
How can I access the answers I need to support my customers?

Sales Reps
How can I get the right answers for my customers' frequently asked questions?

Customers
Where can I go to find answers to my questions, without speaking to an agent?

Salesforce Knowledge

Allows users to easily create and manage content, knowledge articles and quickly find and view articles then need

All SF users can search, view articles without an add-on Knowledge User license and can attach articles to cases based on 'read access"

Knowledge Management users can write, edit, publish and archive articles and attach them to open or closed cases.

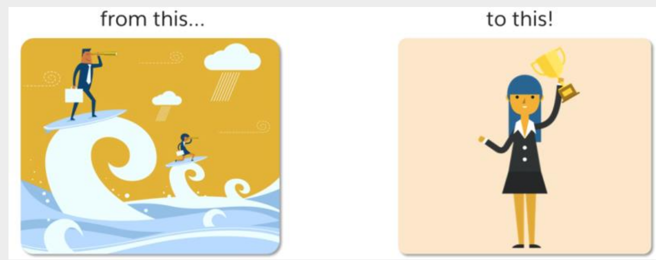
Admins can configure article types an data categories

- Article tab access and article type permissions are defined in profiles and public access settings.
- To improve search performance of the Knowledge Base, minimize the number of article types and data categories

Data Categories

Data categories are used to classify articles and let agents filter their search results

- Data Categories can dictating article relevance and visibility
- Data Category visibility can be set with roles, permission sets or profiles
- You can only have 5 active and inactive category groups at one time
- A group can be up to 5 levels deep and each category group can have 100 categories



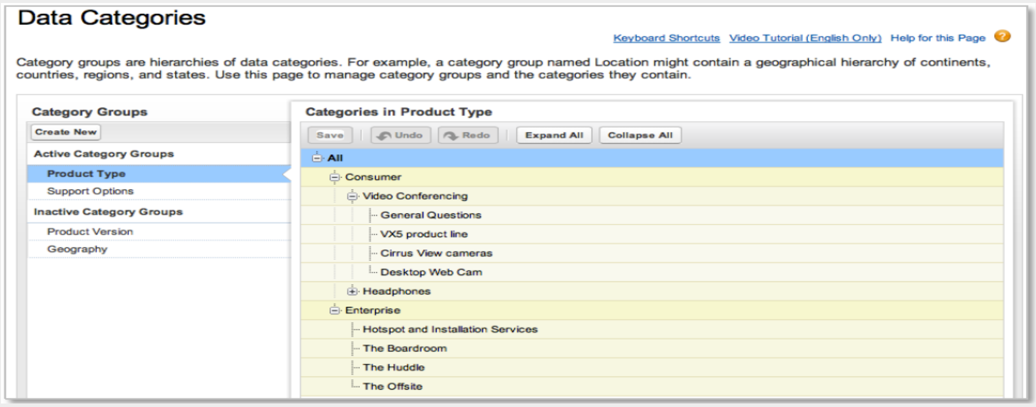
Support agents can see which article version was attached to a case and can create articles while still working on cases

Knowledge requires licensing and Solutions does not

Article Type: The layout editor consists of two parts: a palette on the upper portion of the screen and the layout on the lower portion of the screen. The palette contains the available fields and a section element. The layout contains an Information section and space for you to add sections. By default, all custom fields are included in the Information section.

Dimensions for Categorization

Tag with dimensions for personalized, targeted knowledge. Filter out the noise. Find the right answer, the first time.



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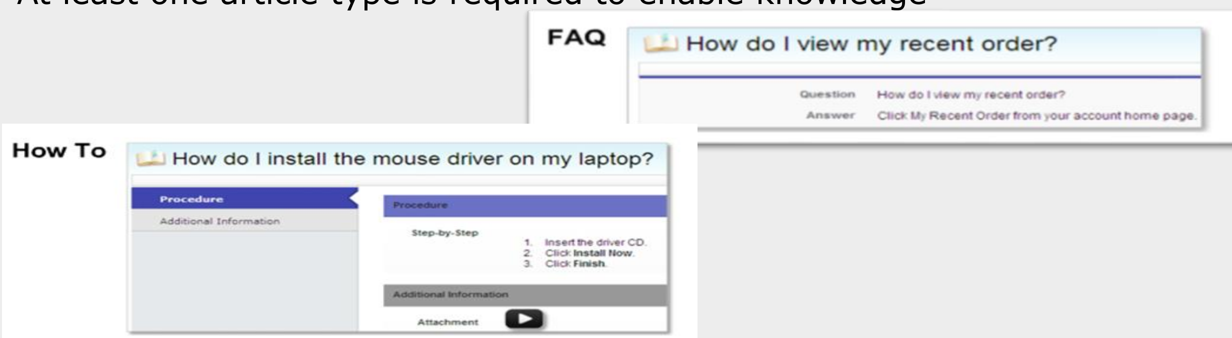
Article Types

Article Types defines the structure and format of an article (look & feel)

- Article types allow for more readable and consistent articles.
- FAQ's, How To's
- Complex Types could include attachments (pictures & videos)
- Step-by-step procedures
- At least one article type is required to enable knowledge



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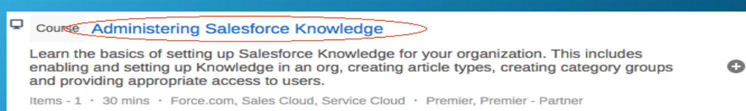
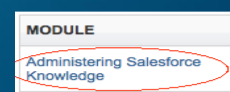
Videos - Administering Salesforce Knowledge

Learn the basics of setting up Salesforce Knowledge for your organization. This includes enabling and setting up Knowledge in an org, creating article types, creating category groups and providing appropriate access to users. (34 min)

How to Get to this training video ?

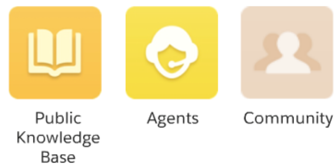
- You need an **@partnertraining.com account**.
- To avoid a mixup with saved credentials open a private window in a new browsr.
- Browse to http://help.salesforce.com and log in with your @partnertraining.com account.
- Search for "Administering Salesforce Knowledge"
- Make sure to select this training (pay attention to the video logo):





- Select the module "Administering Salesforce Knowledge":
- Enjoy the 34 min video.
- Direct Link: (only works after you've logged in with your @partnertraining.com account, paste in browser) https://help.salesforce.com/HTTrainingModulesDetail?courseId=a1S3000[illegible]

What are the Display Channels for Article Types



Public Knowledge Base
Browse & search for knowledge

Community
Personalized information for logged-in users

Internal Users
Search for articles from cases

Managing Data Categories

DEFINITION: Data categories are used to classify and search for articles, dictating article relevance and visibility.

DEFINITION: Data category visibility determines the individual data categories, categorized articles, and categorized questions that a user can see.

Data category visibility can be set with roles, permission sets, or profiles.

There are three types of visibility:

- All Categories: All categories are visible.
- None: No categories are visible.
- Custom: Selected categories are visible.

With custom data category visibility, users can only see the data categories permitted by their role, permission sets, or profile.

Data Category groups are groups that can be organized in a hieratical structure

Rating Articles

Users can rate articles on a scale of one to five stars to view the average rating for an article.

In every 15 days, if an article has not received a new vote, its average moves up or down according to a half-life calculation.

Articles without recent votes trend towards an average rating of three stars.

The Knowledge tab also allows users to:

- Compare the ratings for different articles.
- Sort the list view according to highest or lowest rated articles or the published date, most viewed, and title.
- Search both published and draft articles.
- Follow or unfollow, edit, publish, and delete an article.
- View information by clicking the article or external source title.

Migrate Existing Knowledge

- De-duplicate data and ensure the accuracy of articles prior to migration
- Review article usage metrics to ensure the value of migrated articles
- Define and document categories for each article type
- Sort your existing articles by information type. (i.e. FAQ, product information, or offer)
- Ensure that each information type has a corresponding Salesforce Knowledge article type that matches its structure and content.
- Verify that the article's field-level security settings allow you to edit the fields.
- Test your import using a small set of articles.

The article importer does not support sub-fields. If you have fields within fields, you'll need to adjust your structure and content before importing into Salesforce Knowledge

If your articles contain .html files, use an article type that contains a rich text area field and ensure that the HTML is compliant with the tags and attributes supported in the rich text area field.

Create one .csv file per article type.
.csv files can't have more than 10,000 rows, including the header row.
Therefore, you can have a maximum of 9,999 articles and translations.
.csv file rows can't exceed 400,000 characters.
.csv file cells can't exceed 32 KB.
Each article in the .csv file can't have more than 49 translations.

Compare Files, Content, Solutions and Knowledge

	Files Tab	Salesforce CRM Content	Salesforce Knowledge	Documents Tab	Attachments
Purpose	Upload, store, find, follow, share, sync, and collaborate on Salesforce files in the cloud.	Publish and share official corporate files with coworkers and deliver them to customers.	Create and manage content, known as articles, in a knowledge base. Internal users and customers (on your Customer Portal, partner portal, Service Cloud Portal, or Force.com Sites) can quickly find and view articles they need.	Store Web resources, such as, logos, DOT files, and other Visualforce materials in folders without attaching them to records.	Attach files to records from the Attachments related list on selected detail pages.
Common Uses	Upload a file in Chatter and store it there privately until you're ready to share it. Share the file with coworkers and groups to collaborate and get feedback. Attach files to posts in a Chatter feed on the Home tab, Chatter tab, a profile, a record, or a group. Users with access to Salesforce Files Sync can access, sync, and share files in their Salesforce Files folder.	Create, clone, or modify a sales presentation and save it so only you can see it and work on it. When you're ready, publish it so other users in your company have access to it. Create a content pack and send it to customers.	Write, edit, publish, and archive articles using the Articles Management tab or find and view published articles using the Articles tab. Customers and partners can access articles if Salesforce Knowledge is enabled in your Customer Portal, partner portal, Service Cloud Portal, or Force.com Sites. Create a public knowledge base so website visitors can view articles.	Add a custom logo to meeting requests by uploading your logo to the Documents tab.	Add a file to a specific record, like an event, marketing campaign, contact, or case by attaching it on the Attachments related list.
Supported File Types	All	All	All	All	All
Maximum File Sizes	2 GB	▪ 2 GB ▪ 10 MB for Google Docs ▪ 38 MB when uploaded via the API ▪ 10 MB when uploaded via	5 MB for attachments	▪ 5 MB ▪ 20 KB for a custom-app logo	▪ 25 MB for file attachments ▪ 2 GB for feed attachments ▪ 10 MB for files attached to email (5 MB per file)

Salesforce Search

- Salesforce search capabilities include sidebar, advanced, and global searches, find boxes, lookup fields, Suggested Solutions, Knowledge Base and SOSL (for Apex/API).
- For data to be searched, it must first be indexed. The indexes are created via the search indexing servers.
- Newly created or modified data generates a queue entry to be processed by index processing servers. These servers generally process queues of fewer than 9000 records in one to three minutes. If more than 9000 records are waiting to be indexed, the servers perform bulk indexing at a lower priority.
- **Until the records are indexed, they do not show up in searches.** For large numbers of new or modified records, this can take a long time.

- Salesforce performs indexed searches by first searching the indexes for appropriate records, then narrowing down the results based on access permissions, search limits, and other filters creating a result set.
- After the result set reaches a pre-determined size, the remaining records are discarded. Typically, the result set contains the most relevant results.

Pre-filter the search criteria based on case values – requires APEX code to pass the case values into the desired categories

Leads

Videos, Trailhead - Leads

Leads and Campaigns — Sales Cloud Demo
https://www.youtube.com/watch?v=nSdxzV4ct1Q

Trailhead - Leads & Opportunities
https://trailhead.salesforce.com/en/module/admin_intro_opptys_leads

Trailhead – Accounts & Contacts

https://trailhead.salesforce.com/en/module/admin_intro_accounts_contacts

Standard Objects

What is a Lead?

- Prospect that you want to market to
- Captures business card information
- Individual who has expressed interest in your product or service
- Assigned ownership either manually or via Assignment Rule

What is a Contact?

- Individual who is associated to an Account

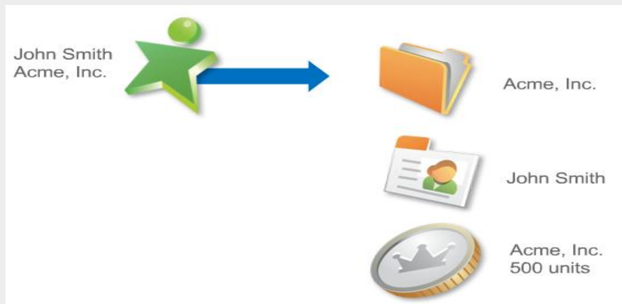
Notes:

Converting Leads

Programmatically moves data and hides Lead

Lead Conversion

- Lead qualification depends on your business process
- Lead information is mapped to the appropriate business object – Account, Contact or Opportunity
- Existing data check



Notes:
When accessing converted lead records, users see all the related records into which a lead was converted, with easy links to those records.
The system automatically maps standard lead fields to standard account, contact, and opportunity fields
For custom lead fields, your administrator can specify how they map to custom account, contact, and opportunity fields
The system assigns the default picklist values for the account, contact, and opportunity when mapping any standard lead picklist fields that are blank. If your organization uses record types, blank values are replaced with the default picklist values of the new record owner.
If the lead has a record type, the default record type of the new owner is assigned to records created during lead conversion.
If the lead matches an existing contact and both records are linked to the same campaign, the campaign member status is determined by whichever is further along in the lifecycle of the campaign. For example, if the lead member status is "sent" and the contact member status is "responded," the responded value is applied to the contact.
If you are using local lead names, the Company Name (Local) on the lead will automatically map to the Account Name (Local) along with their associated standard name fields.
If your organization uses divisions, the new account, contact, and opportunity are assigned to the same division as the lead. If you update an existing account during lead conversion, the account's division is not changed, and the new contact and opportunity inherit the account's division.
If your organization uses territory management, the new account is evaluated by account assignment rules and may be assigned to one or more territories
If a custom object record has a lookup relationship to a lead, the lead lookup field displays an underscore character after the lead is converted. If you click on the underscore character, a message displays that indicates the lead has been converted.
Opportunities created upon lead conversion contain some default values. including no amounts, a close date defaulted to the last day of the current quarter, the stage equal to the first value of the stage picklist.

Managing Marketing Campaigns in Salesforce

In this course, learn how to send targeted emails to leads and contacts using campaigns in Salesforce. Learn how to add leads and contacts as campaign members, and how to find and add new leads using web-to-lead and the import wizard. Then, select a third party vendor on the Salesforce AppExchange to send and track mass emails. Finally, create reports to measure the success of the campaign.(22 min)

How to Get to this training video ?

- You need an **@partnertraining.com account**.
- To avoid a mixup with saved credentials open a private window in a new browsr.
- Browse to http://help.salesforce.com and log in with your @partnertraining.com account.
- Search for "Managing Marketing Campaigns in Salesforce"
- Make sure to select this training (pay attention to the video logo):


Course Managing Marketing Campaigns in Salesforce

Online Course

Items - 1 • Premier, Premier - Partner

Managing Marketing Campaigns in Salesforce

Are you a marketing user who wants to send targeted emails to your leads and contacts in Salesforce and then track and measure the responses to those emails? In this course, learn how to send targeted emails to leads and contacts using campaigns in Salesforce. Learn how to add leads and contacts as campaign members, and how to find and add new leads using web-to-lead and the import wizard. Then, select a third party vendor on the Salesforce AppExchange to send and track mass emails. Finally, create reports to measure the success of the campaign.

22 mins

- Select the module "Managing Marketing Campaigns in Salesforce":
- Enjoy the 22 min video.
- Direct Link: (only works after you've logged in with your @partnertraining.com account, paste in browser) https://help.salesforce.com/HTTrainingModulesDetail?courseId=a1S300

Campaigns

What is a Campaign?

- Specific marketing program or marketing tactic
- Builds awareness and generates leads

Notes:

In order to display a list of contacts and leads that are associated to a campaign, you will need to run a "Campaign Call Down Report". This is a canned report located in the Reports tab under the Campaign Reports section.

<u>Who has access to Campaigns?</u>

Any user in your organization can view campaigns, view the advanced campaign setup, or run campaign reports.

However, only designated Marketing Users with the appropriate user permissions can create, edit, and delete campaigns and configure advanced campaign setup.

An administrator must select the Marketing User checkbox on a user’s personal information to designate that user as a Marketing User.

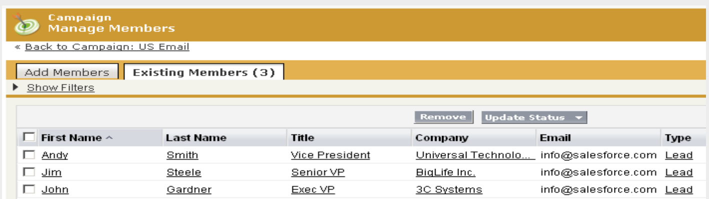
In addition, Marketing Users can import leads and use the campaign import wizards if they also have the Marketing User profile (or the "Import Leads" permission and "Edit" on campaigns).

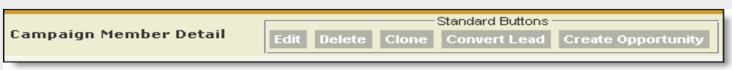
Campaigns are included with Enterprise, Unlimited, and Developer Editions, and available for an additional cost with Professional Edition.

Campaign Member

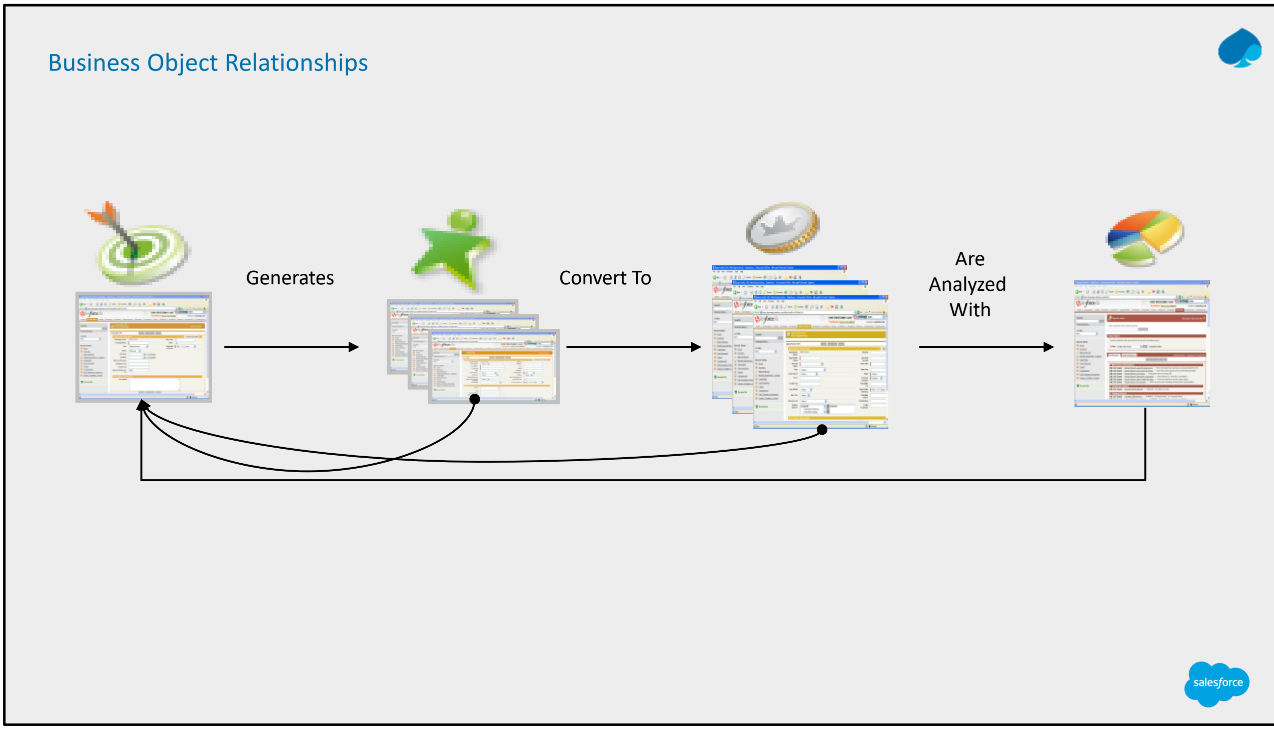
- View, edit, delete, or clone
- Convert a lead to a new or existing account, contact, or opportunity
- Create an opportunity

- A lead or contact, associated to the Campaign
- Individual who has responded to Campaign





On the Campaign Member Detail Page you can view, edit, delete, or clone that record If the campaign Member was created from a lead, you convert that lead from the campaign member record to a new or existing account, contact, or opportunity. If the Campaign Member was created from a Contact you can create an opportunity right from the Campaign Member record.
The combination of custom fields, workflow, and triggers for Campaign Member means you can create automated campaigns

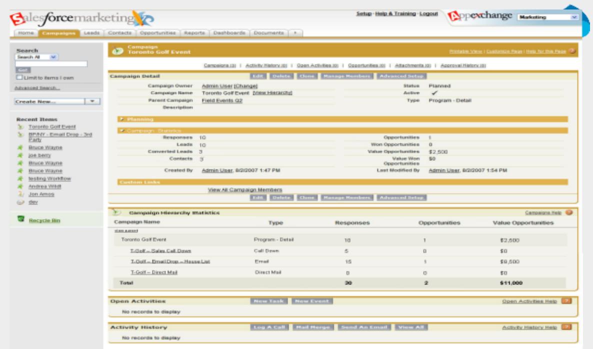


Notes:
Your organization can set its own guidelines for determining when a lead is qualified, but typically, you will want to convert a lead as soon as it becomes a real opportunity that you want to forecast.
The system automatically maps standard lead fields to standard account, contact, and opportunity fields
For custom lead fields, your administrator can specify how they map to custom account, contact, and opportunity fields

Additional Features

Campaign Hierarchy

- View the entire hierarchy
- roll up of parent and child stats
- Associate members at any level in the hierarchy
- Standard report will house the aggregate data in a separate table



Campaign Influence

Many to many relationship between campaigns and opportunities

Influential campaigns display on opportunity related list

See the most influential campaign for an opportunity.

Campaign Hierarchy: A campaign hierarchy allows you to group campaigns together within a specific marketing program or initiative, which enables you to analyze related marketing efforts more efficiently. . By default, the Campaign Hierarchy related list appears on the campaign detail page but does not contain records until campaign hierarchies are configured for your organization.

Campaign Influence:, you have the ability to see all of the marketing campaigns that influenced an opportunity, not just the primary campaign.

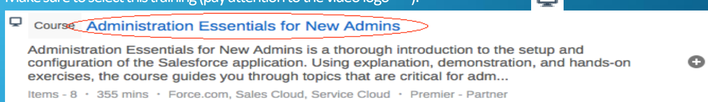
In the past, an opportunity could only be associated with one campaign. However, it's common for several campaigns to influence an opportunity, so the new Campaign Influence feature allows you to track the influence of multiple campaigns on a single opportunity. Influential campaigns display in the Campaign Influence related list on an opportunity. Campaigns can be associated to an opportunity manually on the Campaign Influence related list or automatically when the campaign is related to a contact role on the opportunity prior to the opportunity close date. Association rules and the Campaign Influence Time Frame offer additional methods for automatically identifying influential campaigns. The Primary Campaign Source field, formerly the Campaign Source field, shows you the most influential campaign for an opportunity.

Video: Automation

This video covers workflow (already discussed)
In addition, you'll learn to set up assignment rules and queues, and how to enable and use auto-response rules and Web-to-Lead to enter information into Salesforce

How to Get to this training video ?

- You need an **@partnertraining.com account**.
- To avoid a mixup with saved credentials open a private window in a new browsr.
- Browse to http://help.salesforce.com and log in with your @partnertraining.com account.
- Search for "Administration Essentials for New Admins"
- Make sure to select this training (pay attention to the video logo):



- Select the module "Automation":
- Enjoy the 58 min video.
- Direct Link: (only works after you've logged in with your @partnertraining.com account, paste in browser) https://help.salesforce.com/HTTrainingModulesDetail?courseId=a1S30000000glS6EAI

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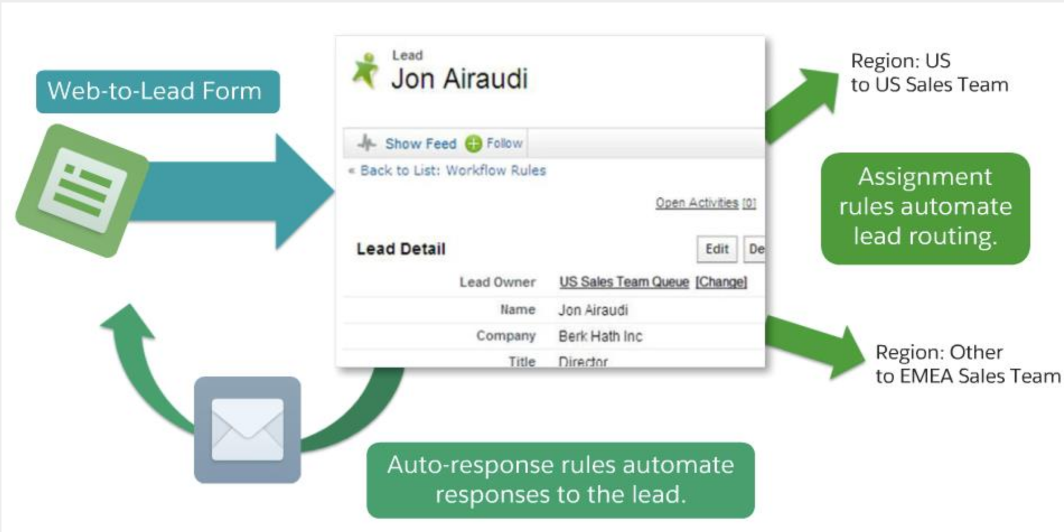
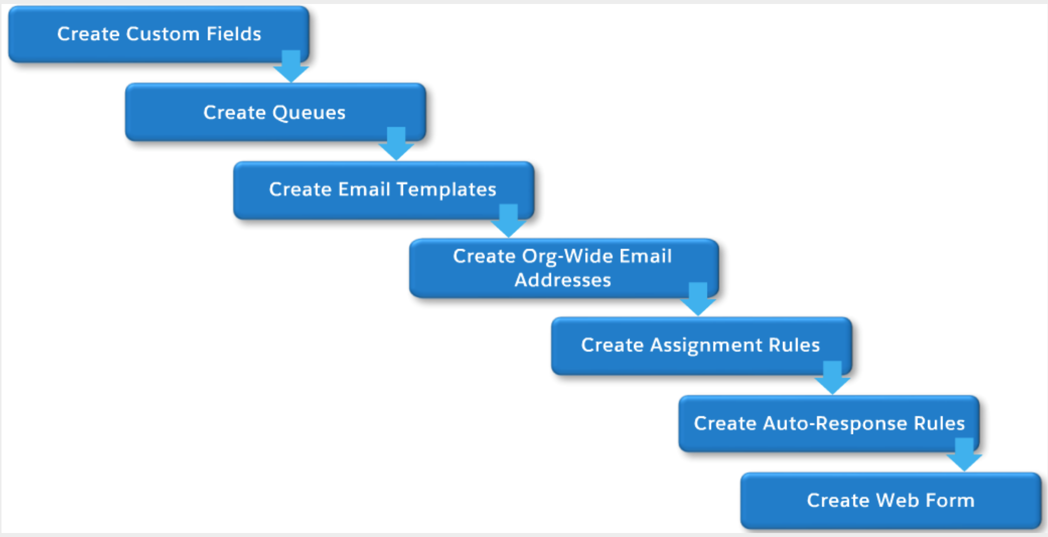
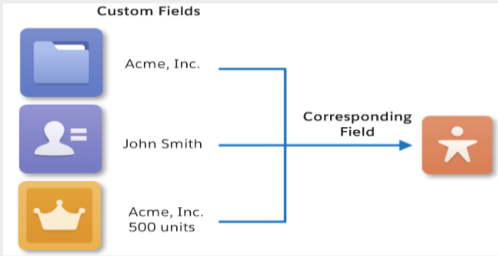
Automating Leads



Preparing for Web to Lead



Create Custom Fields

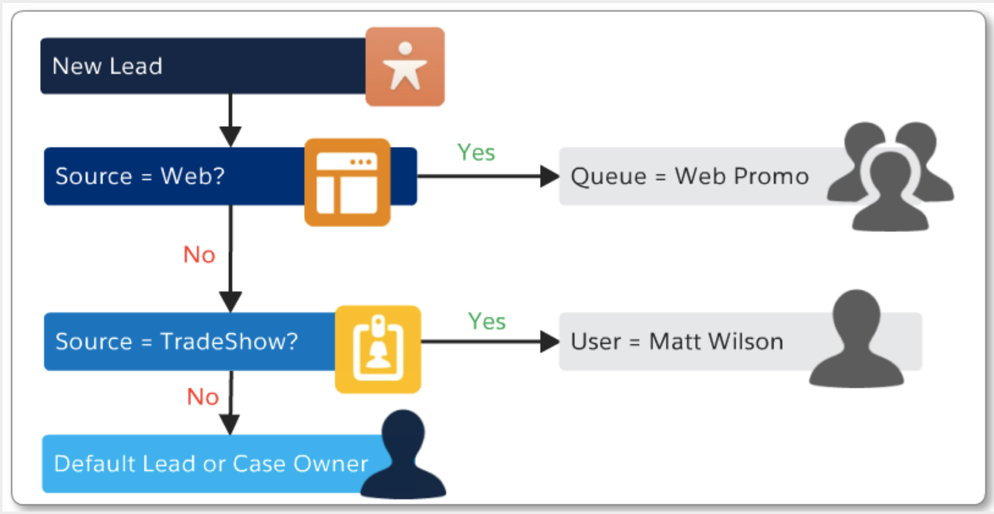


Map custom lead fields to other custom fields of the same data type. Some exceptions are:

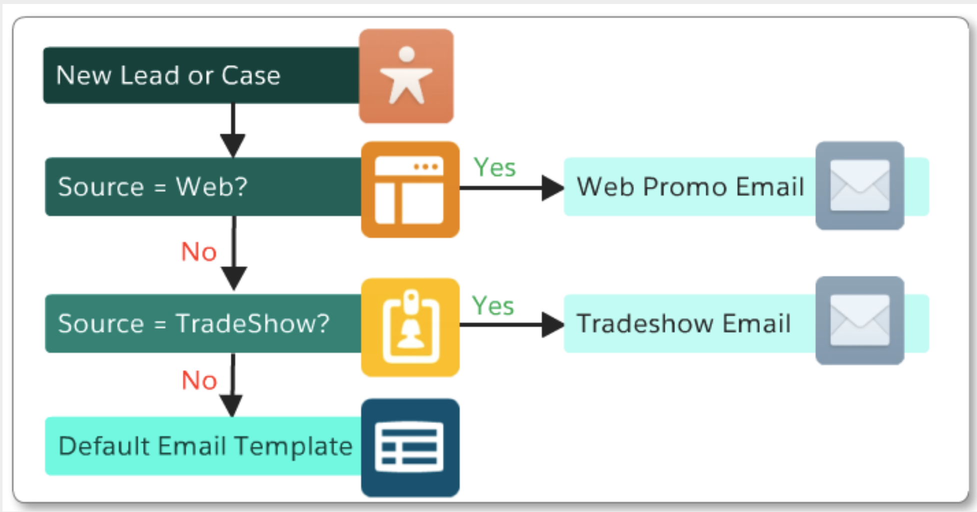
Lead Custom Field	Account, Contact, or Opportunity Custom Field
Picklist	Text (Note: your data may become truncated if the mapped text field is not large enough to hold the entire lead picklist value)
Text, Text Area	Long text
Auto Number	Text, Text Area

Create Queues

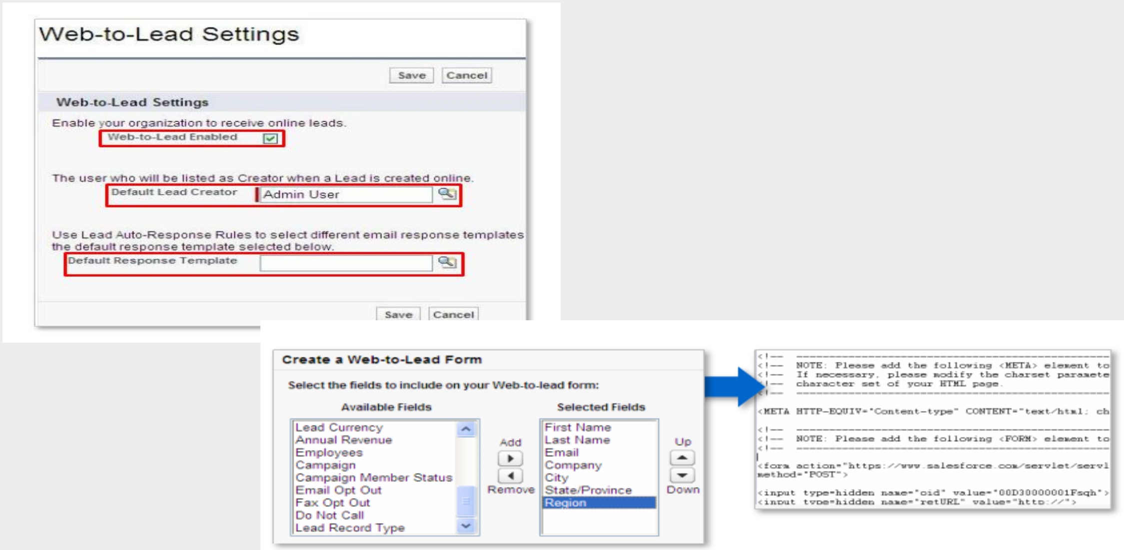
Create Assignment Rules



Create Auto-Response Rules



Web-to-Lead Settings and Create Web Form



Hands-on Exercise

View the hands on exercise steps in the

Administration Essentials for New Admins

"Automation" Exercise Guide

https://lms.cfs-api.com/v1/content/11347b3d-638b-4c86-a02d-27c065981239/presentation_content/external_files/AutomationExerciseGuide.pdf

8-1: Create an Email Footer
8-2: Create a Folder and Letterhead
8-3: Create an Email Template
8-4: Create a New Workflow Rule with Immediate and Time Dependent Actions
8-5: Create a Process
8-6: Prepare the Lead Fields and Create Queues
8-7: Create Assignment Rules
8-8: Create an Auto-Response Rule and Enable Web-to-Lead

Note: VP Services as mentioned in this guide may not exist , use a different role e.g. VP Sales to complete the lab

Task: Create a custom Position object.

https://lms.cfs-api.com/v1/content/dfa6ed10-d021-43da-81d1-d7687413ffbb/presentation_content/external_files/AutomationExerciseGuide.pdf

Note: VP Services as mentioned in this guide may not exist , use a different role e.g. VP Sales to complete the lab

Hands-on Exercise

View the hands on exercise steps in the **Administration Essentials for New Admins** "Automation" Exercise Guide

https://lms.cfs-api.com/v1/content/11347b3d-638b-4c86-a02d-27c065981239/presentation_content/external_files/AutomationExerciseGuide.pdf

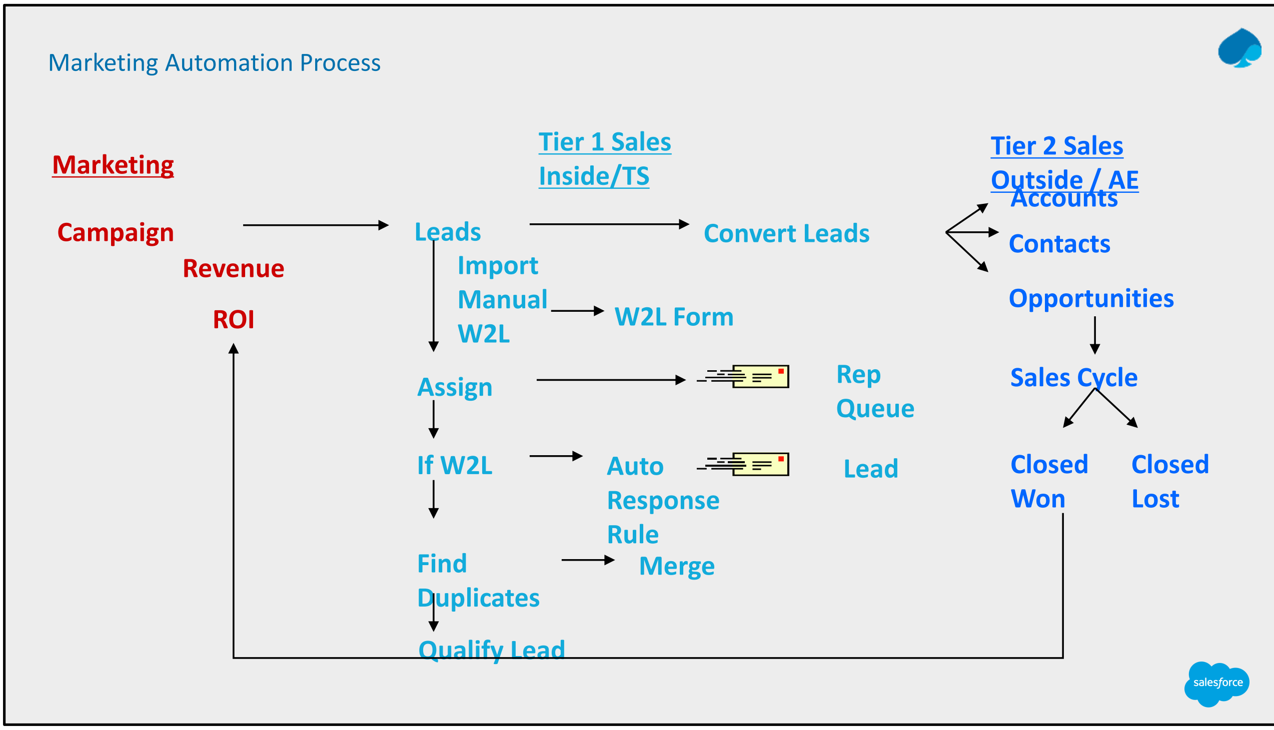
8-6: Prepare the Lead Fields and Create Queues
8-7: Create Assignment Rules
8-8: Create an Auto-Response Rule and Enable Web-to-Lead

Task: Create a custom Position object.

Web to Case

Similar to Web to Lead but creates Cases

Enabling web to case is similar but there are several more template options that need to be designated. In addition, the default Case Status is set on the Web-to-Case setup page rather than from the Case Status field itself, as it is for leads.
The default lead/case owner must be someone who has both the Modify All Data and Send Email permissions.
Enabling Web-to-case is found under
YourName | Setup | Customize | Self-Service | Web-to-Case



Notes:
In order to display a list of contacts and leads that are associated to a campaign, you will need to run a "Campaign Call Down Report". This is a canned report located in the Reports tab under the Campaign Reports section.
Who has access to Campaigns?
Any user in your organization can view campaigns, view the advanced campaign setup, or run campaign reports. However, only designated Marketing Users with the appropriate user permissions can create, edit, and delete campaigns and configure advanced campaign setup. An administrator must select the Marketing User checkbox on a user's personal information to designate that user as a Marketing User.
In addition, Marketing Users can import leads and use the campaign import wizards if they also have the Marketing User profile (or the "Import Leads" permission and "Edit" on campaigns).
Campaigns are included with Enterprise, Unlimited, and Developer Editions, and available for an additional cost with Professional Edition.
Revenue = Total Value Won Opportunities
ROI = (Total Value Won Oppty – Actual Cost)/Actual Cost

Campaign Management

Use Campaign to show current return on investment

- Create Campaign Members
- Mass Email Members
- Convert Leads to Contacts/Opportunities
  - Campaign shows number of converted Leads
  - Campaign shows number of opportunities
  - Campaign shows total value of opportunities
  - Campaign shows total value won opportunities

Campaign Statistics

Total Responses	4	Num Total Opportunities	2
Converted Leads	4	Total Value Opportunities	USD 1,175,000.00
Total Leads	53	Total Value Won Opportunities	USD 50,000.00
Total Contacts	4		

Perhaps your customer replaced a legacy support system with the Service Cloud. Or he acquired another company with its own customer service system and you need to move those agents to the Service Cloud. Moving to a new system can be challenging, but once you make the change to Salesforce, the benefits—such as reducing service costs, quickly resolving cases, and satisfying every customer—can be amazing.

Customer Service Goals

Improve Business Performance

- Average cost per case
  - Report on case volume by channel, type, priority, reason or average status duration and time to close

Drive Agent Productivity

- First Call Resolution
  - Reports by agent: Average time to close, # of open, closed and escalated cases

Monitor Customer Satisfaction

- Average case handling time and Escalations
  - Reports by Account: Average resolution time, cases escalated by account, high priority case totals and by age

KPI's – Key Performance Indicators

Sustainability

-Multi-Channel Support (Phone, Email, Portal, Chat, Social, Call Deflection, Avg. Cost per case

Productivity

-End-to-end Experience (SLA's, Entitlements, Avg. Handle Time)
Loyalty

- Context-Specific Support (Queues, Workflow, Console, 1st Call Resolution)

Support Metrics & Service Cloud Solution

Think about the support metrics that are most important to your customer and match with your Service Cloud solution.

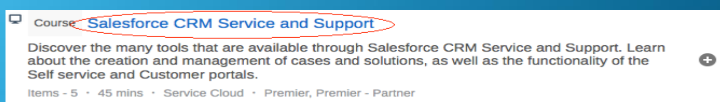
First-call resolution rate	Cases closed report; First-Call Resolved status tracking
How long cases have been open	Custom fields for status entry and duration; trigger
How many cases agents have closed	Case status report by agent
How long it takes to resolve a case	Formula field
All activities associated with the life of a case	Field tracking history

Video: Salesforce CRM Service & Support - Getting Started

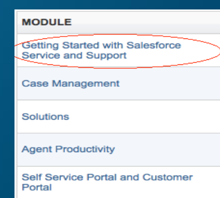
Discover the many tools that are available through Salesforce CRM Service and Support. Learn about the creation and management of cases and solutions, as well as the functionality of the Self service and Customer portals. (Getting Started 56min)

How to Get to this training video ?

- You need an **@partnertraining.com account**.
- To avoid a mixup with saved credentials open a private window in a new browsr.
- Browse to http://help.salesforce.com and log in with your @partnertraining.com account.
- Search for "Salesforce CRM Service and Support"
- Make sure to select this training (pay attention to the video logo):



- Select the module "Getting Started with Salesforce Service and Support":
- Enjoy the 6 min video.
- Direct Link: (only works after you've logged in with your @partnertraining.com account, paste in browser) https://help.salesforce.com/HTTrainingModulesDetail?courseId=a1S30000000gipNEAQ



Cases

- Description of a customer's feedback, problem or question
- Contact, Name, Phone, Email,
- Created by phone, email, email-to-case, website (web-to-case)
- Are assigned to agents or queues
- Product Support and Inquiry case Queues
- Have an ID
- Agent communicate resolution
- Notes logged and case closed
- If not closed, escalate for reassignment

Video: Administration Essentials for the Service Cloud

Manage complete lifecycle of customer service through various channels such as phone calls, emails, websites, and search engines.
Customers can use various devices, such as laptops and mobile devices, to access these channels. (60 Min)

How to Get to this training video ?

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- Search for "Administration Essentials for the Service Cloud"
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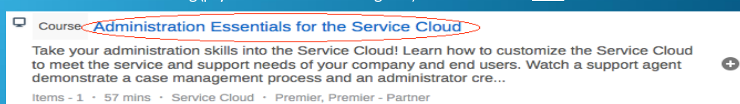

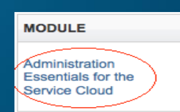

- Select the module "Administration Essentials for the Service Cloud"
- Direct Link: (only works after you've logged in with your @partnertraining.com account, paste in browser) https://help.salesforce.com/HTTrainingModulesDetail?courseId=a1S30000000gIX2EAI

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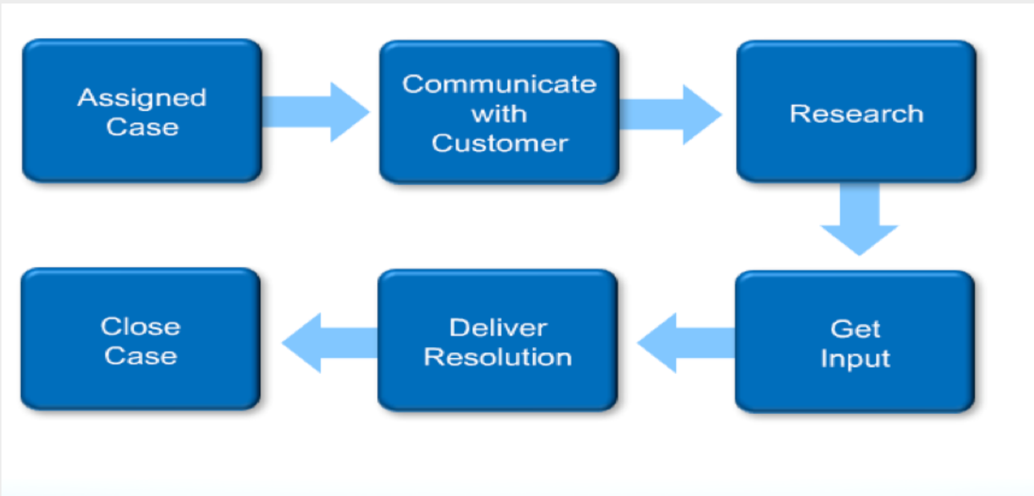
Requires login to Partner Org

Case Life Cycle



Automating Case Management

- Inquiry cases should automatically go to the right agents
- Escalation and Notification should be automated
- **Case Queues**
- Queue is a holding area location where case records can be routed to await processing
- Establish Case Queues
  - Product family
  - Tiers of support
  - Type of customer/service level
- **Case Assignment**
  - Create Assignment rules to route cases to users or queues to work on cases collaboratively or to a support user
  - Activate workflow rule button
  - Create new case to test the new rule
- **Case Escalation Rule**
- **Workflow Rules**
  - Sets workflow actions into motion when certain conditions are met. Actions can take place immediately or on a specific date according to a trigger

Exercises

Create a Queue
Create new queue for Inquiry
Pick Case Object
Add members to the queue
Create assignment rule
Customize, Cases, Assignment Rules
1. Create new assignment rule by criteria
Case record type = product support
Select queue to assign the rule to
2. Create new assignment rule by criteria
Case record type = Inquiry
Select queue to assign the rule to…
Test by setting us a new "Product Support" record type case
Check the box "Assign using active Assignment Rules"
Check send notification

Create Case Escalation Rules
About Escalation Rules
Escalate to **queue** or **another user**
Configure the rule to auto notify a user
Configure rule entries to define the order, criteria, and escalations
Consider enabling early triggers in Support settings
Exercise
For Teir-1 Customize, Cases, Case Escalation Rules
Create new escalation rule and check "active" box
Click new rule entry, sort order number 1
Select criteria for rule
Case Record Type = Product Support
Set business hours, use look up to set to standard 24 hours – Follow the sun model
Select "When the case is created" to run rule
Add an escalation action at 4hrs and notify
Create escalation action
Use support case notice escalation
ID Noah as the person to be notified
ID case owner checkbox
Verify by creating a case, select product support record type
Use Monitor Case escalations and click search to view case escalation to validate that the case is in the queue and the clock is ticking
Actions
Tasks, Email Alerts, Field Updates, Outbound Messages

Business Scenario – VP wants to be notified whenever cases are opened for large accounts. Large = annual revenue that is > $20MM ***OR*** more than 5K employees
Exercise – Create a Workflow Rule on the Case Object
Need to do:
Create a workflow rule on the Case object
Establish rule details and evaluation criteria
Establish rule criteria
Add a workflow action
Test the workflow action
Setup, create, workflow & Approvals, workflow rules
Click New rule button
Choose case object
Add rule name "notify VP of Case at Large Account"
Evaluation Criteria – choose "created"
For Rule Criteria – note, these are AND comments
Account: Revenue > 20000000 (don't put comma, that would become a logical 'or')
Account: Employees > 5000
Add filter logic to state 1 OR 2 (can execute in whatever order you want)
Create new workflow action for New Email Alert
Description, Unique Name
Select email template
Select Role as Recipient Type

Methods of communication

Web-to-case

- Queues – create any needed queues
- Assignment Rules – Create or activate a rule that determines how cases are assigned
- Email Templates – Create any necessary email templates
- Auto-Response Rules – Create or activate rules to send targeted email responses
- Enable Web-to-Case
- Validation rules on web-form have to match case object validation
- Multi-select picklists allow customers to report cases on several products at a time
- Cases queue up if web-to-case generates more than cases > 5000 cases per day
- Support Settings must specify a **Default Case Owner** and an **Automated Case User** (used when automated changes are made)
- SPAM – Use dedicated users to filter out spam cases or leads

Exercise – Automating case submissions from a website

New Standard Auto-response rule

Enter rule criteria

Case Origin = Web

Specify the email sender's name and Address

Select email template

Enable Web-to-Case

Enter fields to capture on cases

Generate a new HTML – which can be used to put on a webpage for the form

Verify case fields on a case generated by the web-form

Methods of communication

Email-to-case

- Email sent, associates email w/the contact record on account
- Email to case configuration - setting check-box
- Choose **on-demand-email to case** – no need for firewall
- Attachment s can not be >10MB
- Add emails related list to case page layouts
- Subject line of email = subject line of case created
- Description = body of the case
- Automatically associates customer email replies, including attachments, with case
- Triggers assignment, escalation, and workflow rules
- View customer emails and attachments from the related list

There are a few differences between Email-to-Case and On-Demand

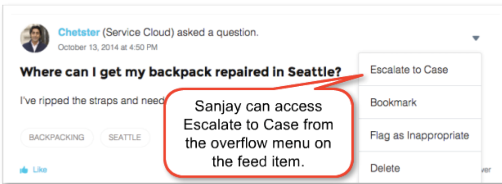
Email-to-Case.Email-to-CaseEmail-to-Case requires downloading the Email-to-Case agent. This lets you keep all email traffic within your network's firewall and accept emails larger than 25 MB. You must install this agent on your local machine before Salesforce can process your company's support emails.

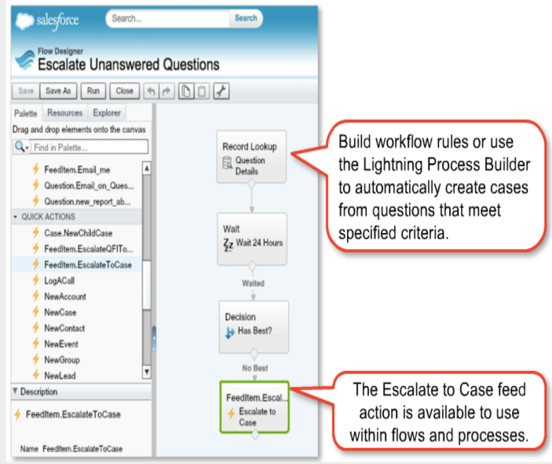
On-Demand Email-to-CaseUnlike Email-to-Case, On-Demand Email-to-Case uses Apex email services to convert email to cases, without requiring you to download and install an agent behind your network's firewall. Use On-Demand Email-to-Case if you're not concerned about keeping email traffic within your firewall, and you don't need to accept attachments larger than 25 MB from customers.

Methods of communication

Question-to-Case

If a question in Chatter isn't resolved, Sanjay can escalate the question to a case directly in the feed.





Methods of communication

Auto-Response Rules
- Run each time a case is submitted (Web, Portal Communities)
- Can automatically respond with "how-to" information such as resetting password

Email Templates
- Setup for all responses
- Can use a VF page as a template

Email from a Case
- High quality of service and convenience to customers with email-to-case automation.
- Email templates allow you to communicate to your customers consistently and efficiently.
- Emails related lists on cases allow you to track all email communications to and from your customers.

Enable Case Comment Notification

Enable the Send Email Notification option on case edit pages so that support reps can send an email to any contact when they have added a new comment to a case.
In Support Settings select the Enable Case Comment Notification to Contacts checkbox.
Choose an email template to use for case comment notifications in the Case Comment Template field.
Note: You can create workflow rules for case comments so that case comments automatically trigger outbound messages or update fields on the cases with which they are associated.

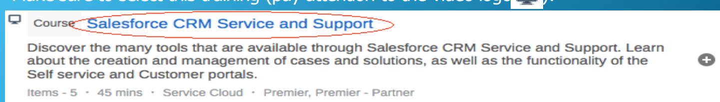
For example, you can create a workflow rule so that when a case comment is added to a case,
the case's Status changes from “waiting for Customer” to “In Process”.

Video: Agent Productivity

Learn how cases are created and managed within Salesforce CRM through related lists and the Cases home page. You will learn about the lifecycle of a case and how to group cases under a parent case. (9 min)

How to Get to this training video ?

- You need an **@partnertraining.com account**.
- To avoid a mixup with saved credentials open a private window in a new browsr.
- Browse to http://help.salesforce.com and log in with your @partnertraining.com account.
- Search for "Salesforce CRM Service and Support"
- Make sure to select this training (pay attention to the video logo):



- Select the module "Agent Productivity":
- Enjoy the 9 min video.
- Direct Link: (only works after you've logged in with your @partnertraining.com account, paste in browser) https://help.salesforce.com/HTTrainingModulesDetail?courseId=a1S30000000gipNEAQ

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Case Teams

Groups of people who work together on cases

Case Team – user to grant additional access to their cases and related records. Members can be users, contacts, or predefined case teams.

Assign team roles – Tier-2 Support Agent, Support Mgr, Product Mgr.

Access to private, RO, R/W

Members can be users, contacts or predefined case teams

Best Practice:

- Create WF email alerts for case teams
- Configure assignment rules to automatically add case teams to cases
- See completed calls and interaction log entries in a case's feed when using Case Feed with the Salesforce Console for Service

Setting Up Workflow Alerts for Case Team Members
Users with the "Customize Application" permission can set up email alerts for case team members so that each time a case is updated or created, team members associated with the case are automatically notified.
1. Create email templates with which to notify case team members. For more information, see "Managing Email Templates"
in the Salesforce Help.
2. Set up workflow rules that specify what actions on a case trigger email notifications to case team members
3. Add email alerts to the workflow rule so that notifications are sent to case team members when actions on cases match rule criteria

Creating Assignment Rules for Predefined Case Teams
Optionally, create assignment rules so that when a case matches assignment rule criteria, a predefined case team is automatically added to the case.

Case Feed

Managers or account reps who want to follow and contribute to Chatter about a case without changing case details
Case Feed – enhances case management by introducing new ways to:

- Create cases
- Review cases
- Update cases
- Displays case history from creation to conclusion
- Anyone can follow
- Log calls
- Write Internal Note
- Change Status
- View Case Details
- Integrates easily with SF knowledge
- Filter Case activities by Type

- Enable Chatter
- Enable case feed in Support Settings
- Add “Use Case Feed” to a new or existing permission set
- Assign the permission set to users

Hands-on Exercise

Complete the following optional trailhead

Service Cloud Basics - https://trailhead.salesforce.com/en/module/service_basics

Task: Create a custom Position object.

Solutions

Solutions - Video

See how you can create, locate, and manage Solutions. Follow a Solution from its creation and the initial draft stage through the Reviewed status. Learn how to attach a Solution to a case and edit that Solution. (9 min)

How to Get to this training video ?

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- To avoid a mixup with saved credentials open a private window in a new browsr.
- Browse to http://help.salesforce.com and log in with your @partnertraining.com account.
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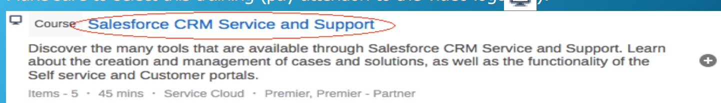
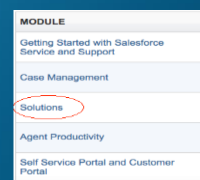




- Select the module "Solutions":
- Enjoy the 9 min video.
- Direct Link: (only works after you've logged in with your @partnertraining.com account, paste in browser) https://help.salesforce.com/HTTrainingModulesDetail?courseId=a1S30000000gipNEAQ

Solutions

Solution Categories – allow you and your users to group similar solutions together, making them easier to find… can also create sub-solutions

- Solution Categories
- Manage Categories
- Enabled Solution Browsing (enables browsing by categories)
- Solutions is low cost alternative to Salesforce Knowledge, but will not evolve

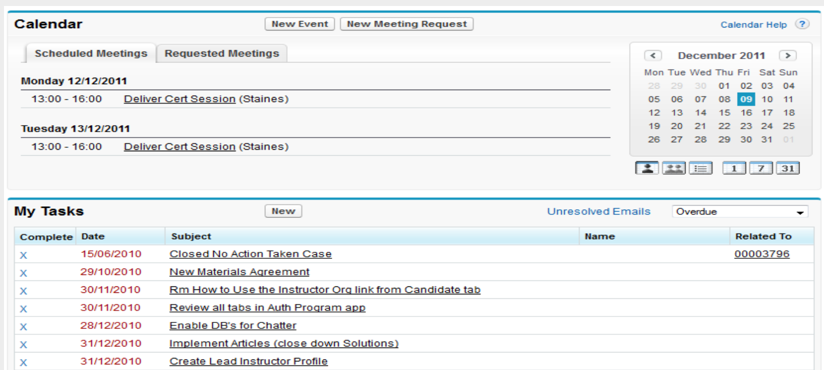
Solutions cheetsheet

Knowledge requires licensing and Solutions does not

Activity Management

Activity Management

Activities include tasks, calendar events, and requested meetings. You can define and track activities for many different objects, including campaigns, accounts, contacts, and leads.
Activities display in related lists on associated records as well as on the Home tab.



Activity Management

On the Activity Settings page in, you can manage the following activity-related features:

Customization Options for Managing Events and Tasks Together
Give sales reps a more accurate perspective on their leads, contacts, opportunities, and accounts. Use combined activities settings to help them manage and track meetings and tasks. Options differ for Lightning Experience and Salesforce Classic.

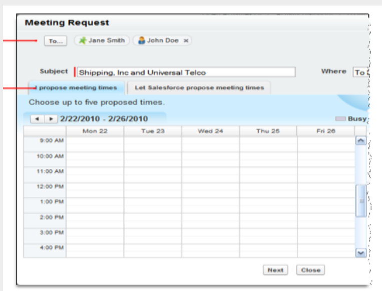
Customization Options for Events and Calendars
Optimize the way your sales reps manage their meetings and scheduling. Options differ for Lightning Experience, Salesforce Classic, and Salesforce1.

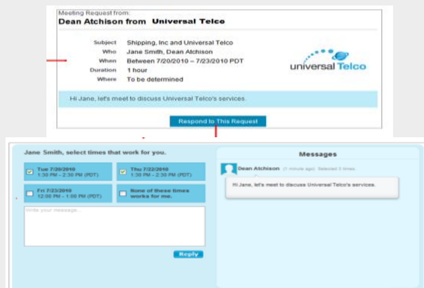
Customization Options for Tasks
Optimize the way your sales reps manage their work. Options differ for Lightning Experience, Salesforce Classic, and Salesforce1.

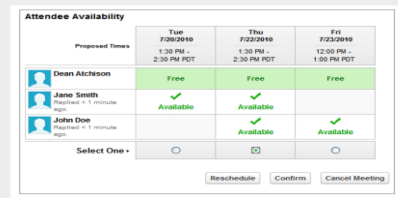
Cloud Scheduler

When you use Cloud Scheduler to request a meeting with a contact, lead, person account, or other Salesforce user, Salesforce creates a unique Web page for your meeting that displays the proposed meeting times.

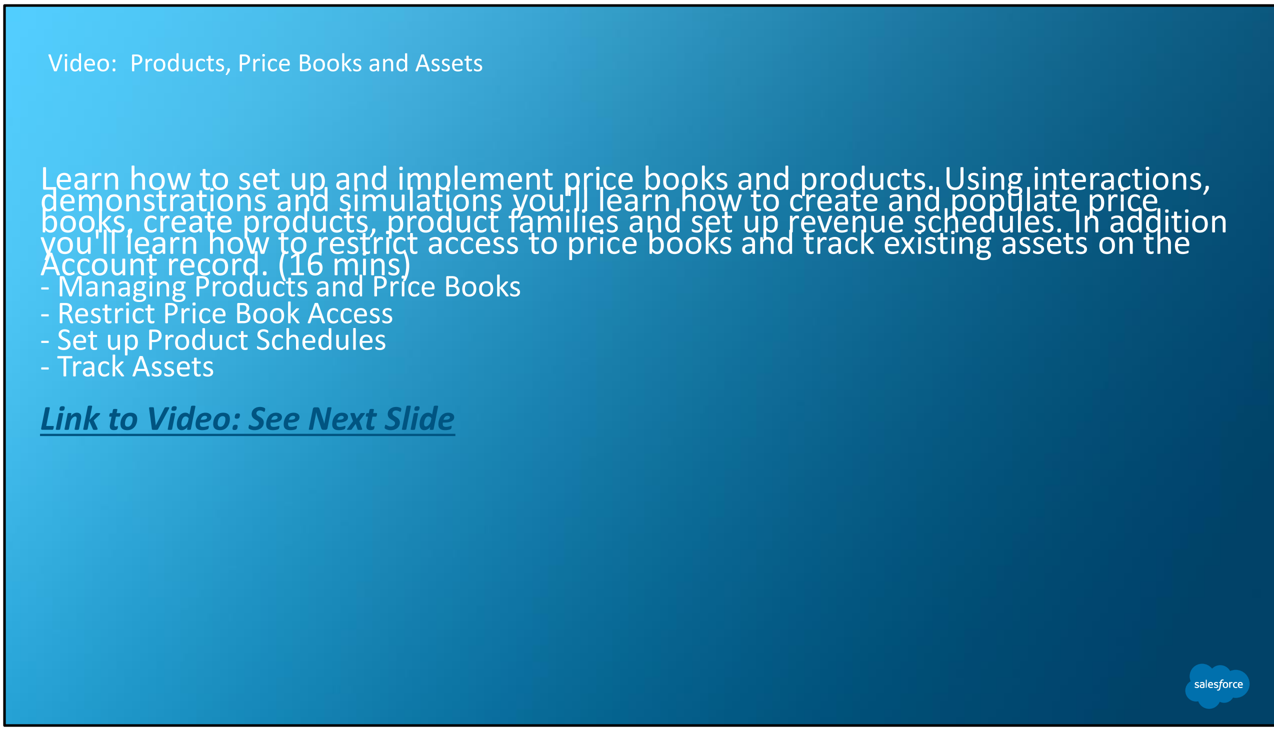
When invitees visit the page, they select the times that work for them, and send you a reply. Salesforce tracks all the responses so you can pick the best time to meet when you confirm the meeting.







Products & Price Books


Video: Products, Price Books and Assets
Learn how to set up and implement price books and products. Using interactions, demonstrations and simulations you'll learn how to create and populate price books, create products, product families and set up revenue schedules. In addition you'll learn how to restrict access to price books and track existing assets on the Account record. (16 mins)
- Managing Products and Price Books
- Restrict Price Book Access
- Set up Product Schedules
- Track Assets
Link to Video: See Next Slide
salesforce

Products, Price Books and Assets - Video

Learn how to set up and implement price books and products. Using interactions, demonstrations and simulations you'll learn how to create and populate price books, create products, product families and set up revenue schedules. In addition you'll learn how to restrict access to price books and track existing assets on the Account record.

How to Get to this training video ?

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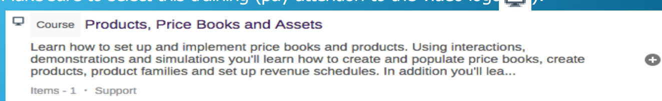
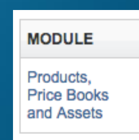
- To avoid a mixup with saved credentials open a private window in a new browsr.
- Browse to http://help.salesforce.com and log in with your @partnertraining.com account.
- Search for "Products, Price Books and Assets"
- Make sure to select this training (pay attention to the video logo):





- Select the module "Products, Price Books and Assets":
- Enjoy the video.
- Direct Link: (only works after you've logged in with your @partnertraining.com account, paste in browser) https://help.salesforce.com/HTTrainingModulesDetail?courseId=a1S30000000glWx

Products & Price Books

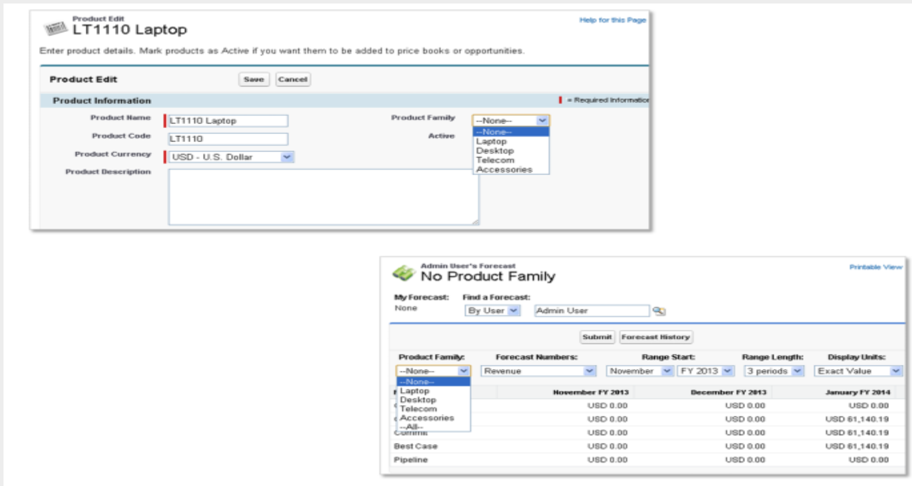
- Products are the individual items that you sell on your opportunities and quotes.
- You can create a product and associate it with a price in a price book.
- Each product can exist in many different price books with many different prices.
- A product that is listed in a price book with a price is called a price book entry.
- A price book contains products and their associated prices.
- Each product with its associated price is referred to as a price book entry.
- You can use the standard price book or create custom price books.
- Schedules: You can establish default schedules on a product, as well as schedules for individual line items (opportunity products) on an opportunity .
- Types of schedules: quantity schedules, revenue schedules, or both.
  - Quantity Schedule–Outlines the dates, number of units, and number of installments for payments, shipping, or other use as determined by your organization.
  - Revenue Schedule–Outlines the dates, revenue amounts, and number of installments for payments, recognizing revenue, or other use

Definitions

Products:
Individual items or services that an organization sells to customers through an Opportunity.

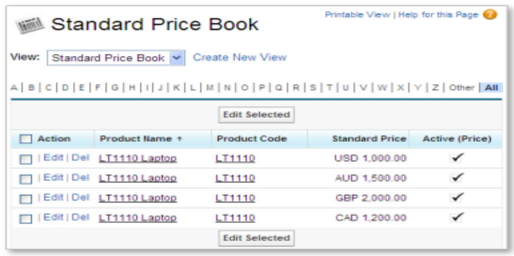
Product Family:
A category of products (e.g., Shipping Containers vs. Service Agreements).

Product Families and Forecasting



Price Book Definitions

Price Book:
A list of products and their associated prices



Price Book entry:
An individual product with its associated price

Standard and Custom Price Books

An Opportunity can only have one price book

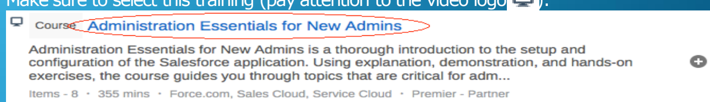
Global User Interface & User Set-up

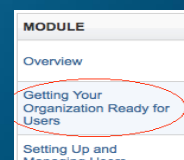
Video: Getting Your Organization Ready for Users

Learn how to enable and customize a variety of user interface settings for your end users, including list views, tabs, and search. Learn the basics of organization administration, including how to set up your company profile, add multiple cuarrencies, and change the calendar used in Salesforce.(52 mins)

How to Get to this training video ?

- You need an **@partnertraining.com account**.
- To avoid a mixup with saved credentials open a private window in a new browsr.
- Browse to http://help.salesforce.com and log in with your @partnertraining.com account.
- Search for "Administration Essentials for New Admins"
- Make sure to select this training (pay attention to the video logo):



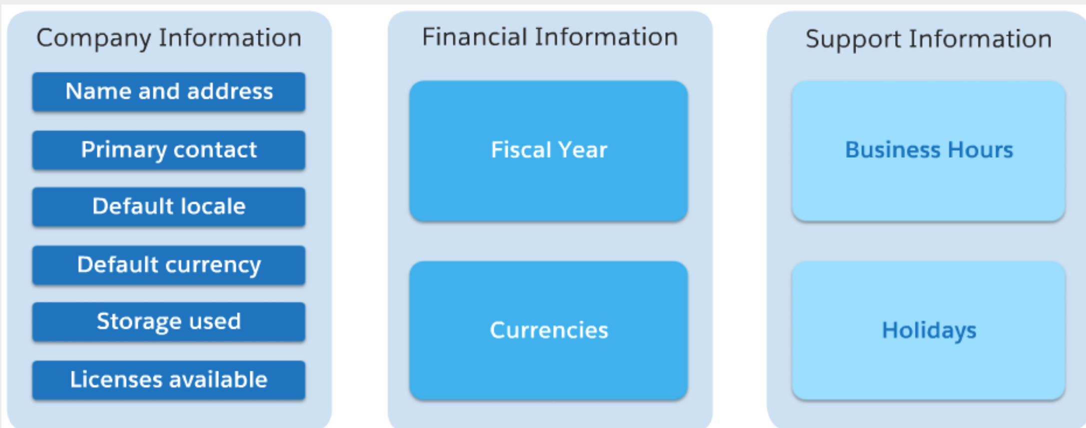


- Select the module "Getting Your Organization Ready for Users":
- Enjoy the 52 min video.
- Direct Link: (only works after you've logged in with your @partnertraining.com account, paste in browser) https://help.salesforce.com/HTTrainingModulesDetail?courseId=a1S30000000glS6EAI

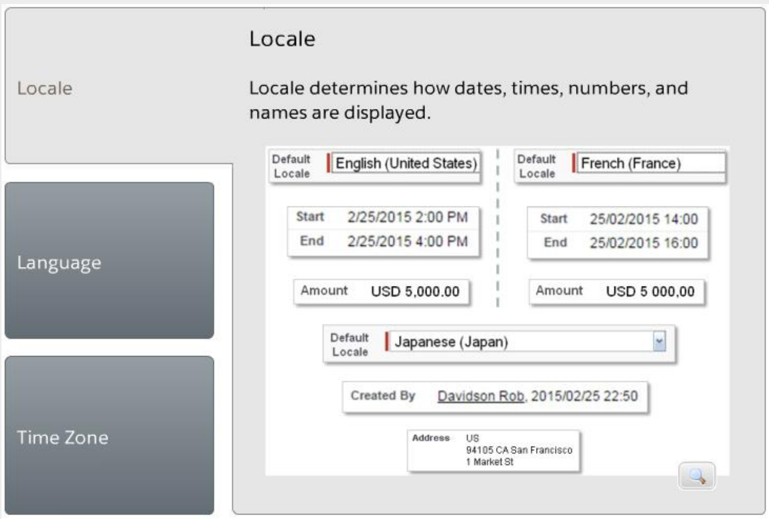
salesforce

What is the Company Profile?

A collection of information about a company mostly captured at contractual signup



Locale Settings - Locale



Locale Settings - Language

Locale

Language

Time Zone

Language

Language determines the language in the user interface and in Help & Training.

Locale Settings – Time Zone

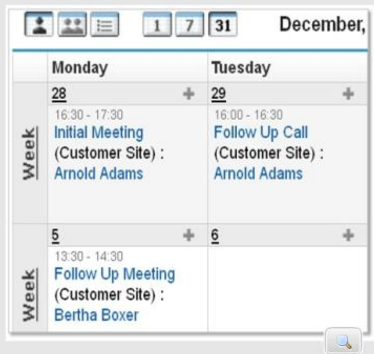
Locale

Language

Time Zone

Time Zone

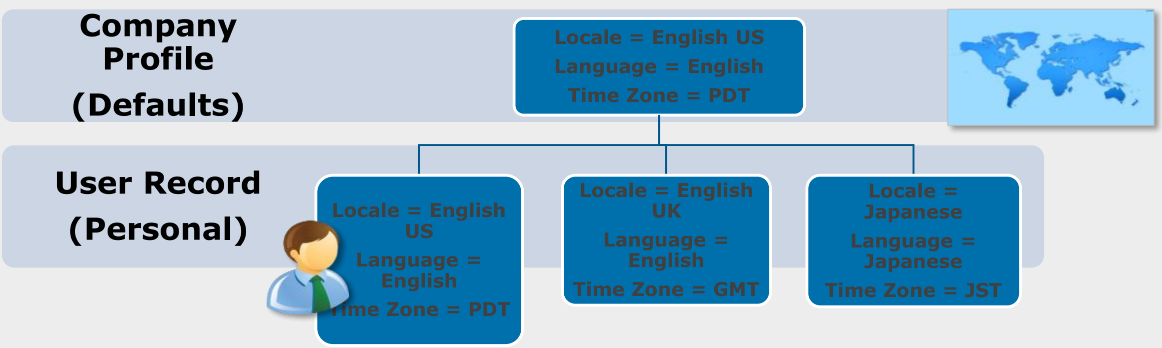
Time zone determines the time zone used for event start and end times, and in Date/Time fields.



How do Locale Settings Work?

Set your locale settings at the company level and at the user level.

- Set your company defaults for your organization's head office.
- New users automatically inherit the company defaults.
- Modify personal locale settings for each user as required.



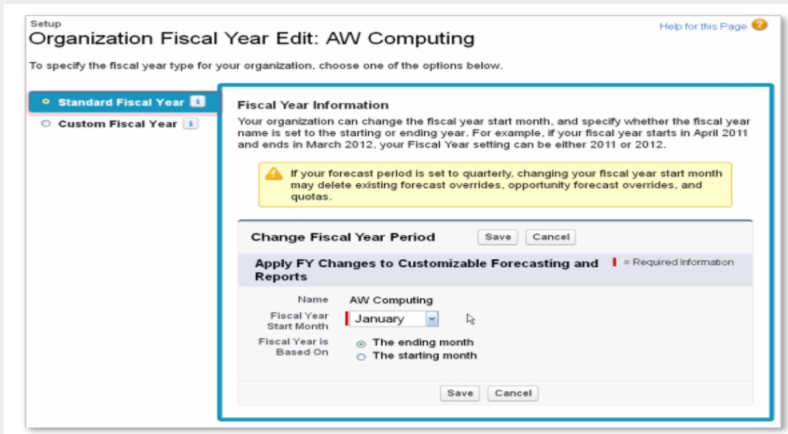
Teaching Points

Extra Material

Suggestions

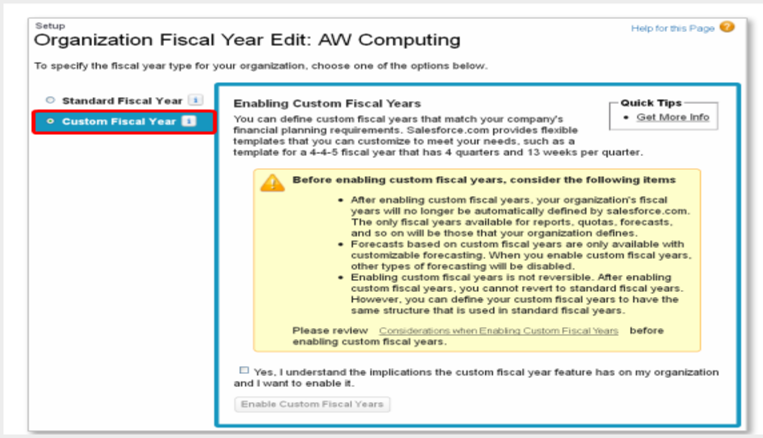
Standard Fiscal Year

Default Fiscal Year Settings based on Gregorian Calendar



Custom Fiscal Year

If Calendar is non standard - This cannot be changed back



Custom Fiscal Year

Define a custom fiscal year if you have:

- A 13-month fiscal year.
- 13-week fiscal quarters.
- A fiscal year not starting on the first day of the month.

Select Fiscal Year Structure

Choose one of the following templates and click Continue. These templates will be used as the basis for a fiscal year structure which you will be able to customize. For more information on the templates and fiscal year customization, see Custom Fiscal Year Templates in the online help.

Template Type	Template Description
4 Quarters per Year, 13 Weeks per Quarter	
4-4-5	Within each quarter, period 1 has 4 weeks, period 2 has 4 weeks, and period 3 has 5 weeks
4-5-4	Within each quarter, period 1 has 4 weeks, period 2 has 5 weeks, and period 3 has 4 weeks
5-4-4	Within each quarter, period 1 has 5 weeks, period 2 has 4 weeks, and period 3 has 4 weeks
13 Periods per Year, 4 Weeks per Period	
3-3-3-4	Quarter 1 has 3 periods, quarter 2 has 3 periods, quarter 3 has 3 periods, and quarter 4 has 4 periods
3-3-4-3	Quarter 1 has 3 periods, quarter 2 has 3 periods, quarter 3 has 4 periods, and quarter 4 has 3 periods

salesforce

Working with Multiple Currencies

Currency

Help for this Page

Use this page to define all the currencies used by your organization. Corporate Currency should be set to the currency in which your corporate headquarters reports revenue. If you designate a different currency as corporate, all conversion rates will be modified to reflect the change.

Advanced Currency Management is not enabled

Allows you to manage dated exchange rates that map a currency conversion rate to a specific date range. For more information, see Understanding dated exchange rates.

Enable

Parenthetical Currency Conversion is enabled

In multi-currency organizations, Salesforce displays converted currency amounts to users whose personal currency is different from the currency of the record they're viewing. Converted amounts appear in parentheses. If you disable this feature, currency fields display only the currency of the record.

Disable

Active Currencies New | Edit Rates | Change Corporate

Action	Currency Code	Currency Name	Corporate	Conversion Rate	Decimal Places	Last Modified By
Edit | Deactivate	EUR	Euro		0.775400	2	Admin User, 7/7/2013 9:55 PM
Edit | Deactivate	GBP	British Pound		0.653400	2	Admin User, 7/7/2013 9:57 PM
Edit | Deactivate	JPY	Japanese Yen		102.130000	0	Admin User, 7/7/2013 9:56 PM
Edit | Deactivate	USD	U.S. Dollar	✓	1.000000	2	Admin User, 6/11/2013 1:26 PM

salesforce

Working with Multiple Currencies

What's Happened to My Closed Opportunities?

Historical Opportunities have amount updated on new currency rates – providing bad information

Multi-currency allows just one exchange rate per currency, by default. This means that when you update an exchange rate, you are updating the converted amount on all records using that currency.

Teaching Points

Extra Material

Suggestions

What is Advanced Currency Management?

Advanced currency management effectively allows you to "lock" the converted amount on closed opportunities.

- You can give each new exchange rate a start date.
- Closed opportunities use the rate that corresponds with the close date

Teaching Points

Extra Material

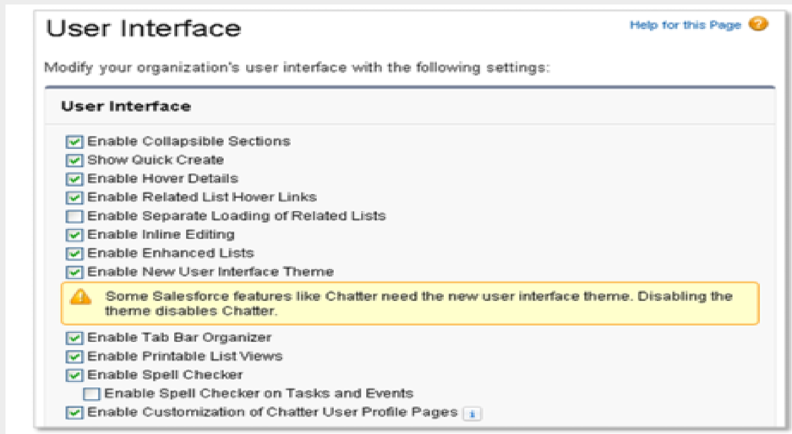
Suggestions

What are User Interface Settings?

The user interface settings are global settings that let you configure the way *all* users interact with Salesforce and their data

. Use them to:

- Speed up navigation.
- Enhance productivity.



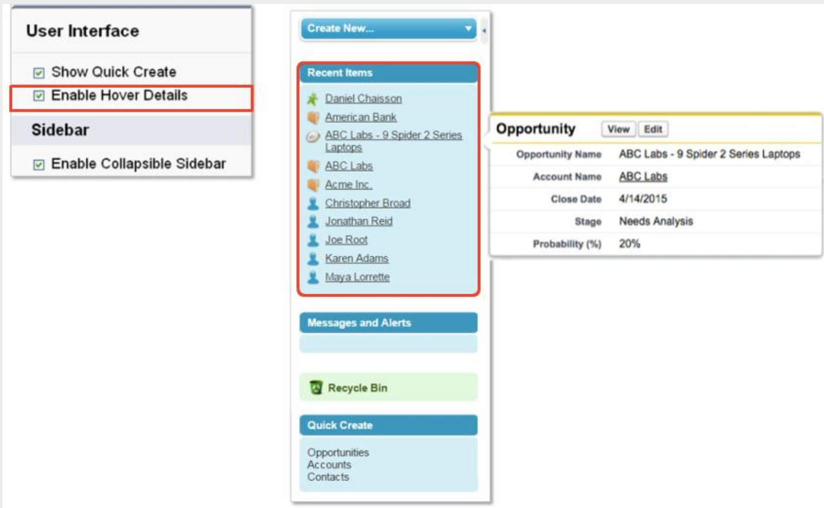
Teaching Points

Reference Slide Only – This should be shown in the application.

Extra Material

Suggestions

User Interface Settings for the Sidebar



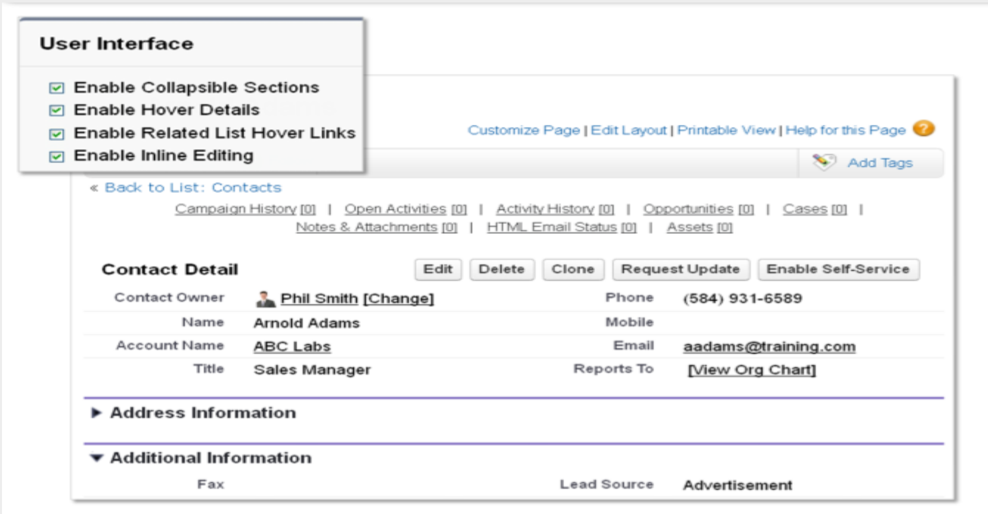
Teaching Points

Reference Slide Only – This should be shown in the application.

Extra Material

Suggestions

User Interface Settings for Record Detail Pages

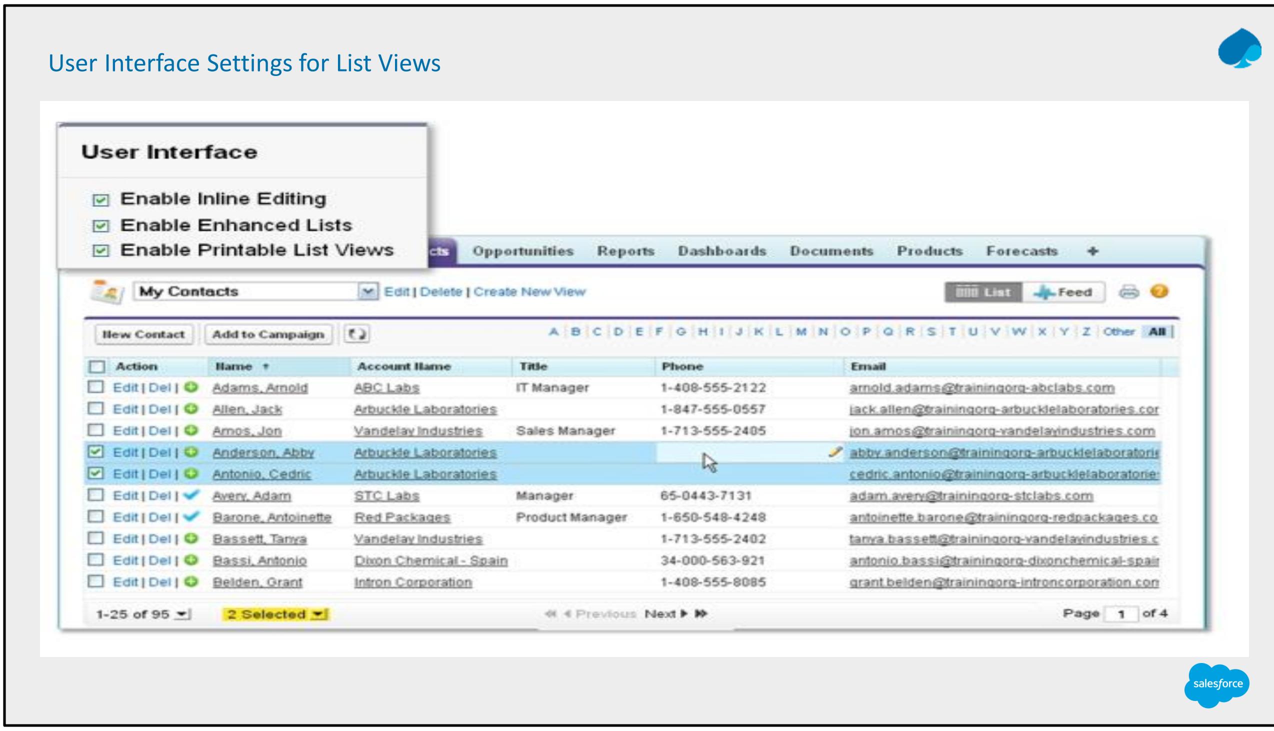


Teaching Points

Reference Slide Only – This should be shown in the application.

Extra Material

Suggestions



Teaching Points

Reference Slide Only – This should be shown in the application.

Extra Material

Suggestions

List Views

Create list views for frequently performed searches.

- Filter on a specific field or fields.
- Specify which groups of users have access to the list view.
- Print list views.
- Edit records in list views. (Mass & In-line edit, Record Types)
- Enable enhanced lists to make inline editing available in list views too.
- Follow records and view related Chatter posts.

Difference between list views and global search is that list views allow for a greater degree of accuracy since you can choose which fields to filter on.

In-line editing and mass edit is not available when a list view contains records with different record types (the check boxes do not appear).

You would need to add a filter to display only records of a single record type. (Record types are covered in module

Certain fields cannot be edited in list views, for example "life-cycle" fields such as Stage and Status.

Salesforce Search

Customize search settings and search layouts to help users quickly find the information they need.

Sidebar Search:

- Only enabled with Chatter off
- Searches only a subset of records and fields
- Phrase search, matches words in exact sequence

Global Search:

- Only enabled with Chatter on
- Searches more records and fields, including Chatter feeds, groups, and people
- Search words treated separately

Hands-on Exercise

View the hands on exercise steps in the **Administration Essentials for New Admins** "Getting Your Organization Ready for Users" Exercise Guide

https://lms.cfs-api.com/v1/content/528efcf0-2ff1-48c6-b5e5-232015463e37/presentation_content/external_files/gettingyourorganizationreadyforusers.pdf

Complete the following sections:

2-1: Check the Company Profile

2-2: Check the Fiscal Year and Set Up the Euro Currency

2-3: Update Exchange Rates

2-4: Update the Euro Exchange Rate with ACM

2-5: Modify the UI to Improve User Experience

2-6: Configure Searches

2-7: Create a Technology Accounts List View

2-8: Create a Manufacturing Accounts List View

2-9: Create Public and Private Chatter Groups

2-10: Getting Ready for Salesforce1

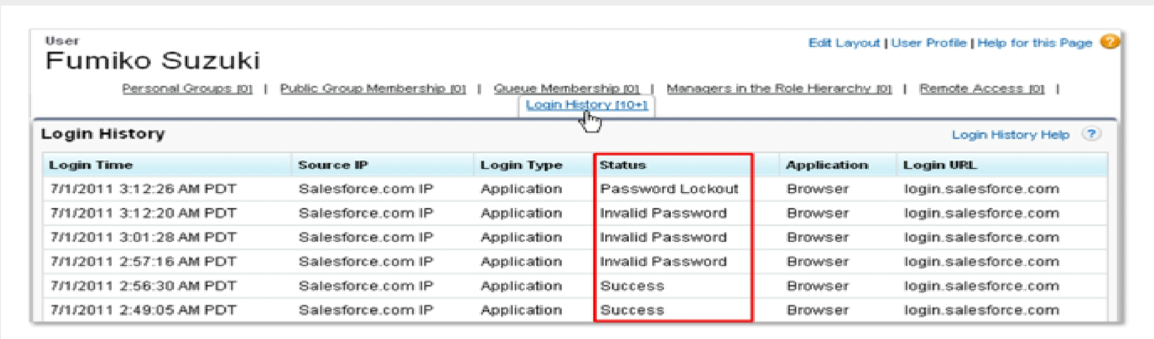
Task: Create a custom Position object.

User Login

Viewing a User's Login History

The Login History related list on a user record displays when, where, and how a user attempts to log in.

Use the Status column to diagnose any login issues.
If there is no entry here for a user's login attempt, the user is probably using an incorrect username.



Login Time	Source IP	Login Type	Status	Application	Login URL
7/1/2011 3:12:26 AM PDT	Salesforce.com IP	Application	Password Lockout	Browser	login.salesforce.com
7/1/2011 3:12:20 AM PDT	Salesforce.com IP	Application	Invalid Password	Browser	login.salesforce.com
7/1/2011 3:01:28 AM PDT	Salesforce.com IP	Application	Invalid Password	Browser	login.salesforce.com
7/1/2011 2:57:16 AM PDT	Salesforce.com IP	Application	Invalid Password	Browser	login.salesforce.com
7/1/2011 2:56:30 AM PDT	Salesforce.com IP	Application	Success	Browser	login.salesforce.com
7/1/2011 2:49:05 AM PDT	Salesforce.com IP	Application	Success	Browser	login.salesforce.com

Teaching Points

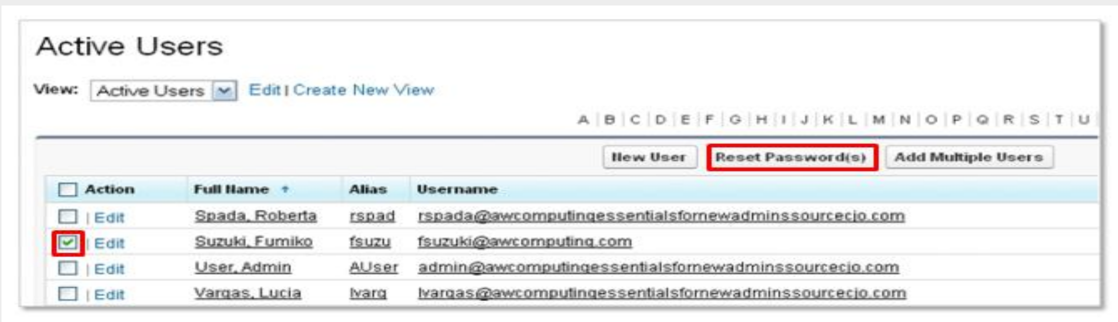
Extra Material

Suggestions

Dealing with an Invalid Password

It's good practice to let users reset their passwords themselves by clicking the Forgot your password? link on the login page.

If they continue to experience issues, you can reset passwords manually.



Teaching Points

Extra Material

Suggestions

Confirming Security Settings

Password lockout occurs when you have a password policy to lock users out when they exceed certain number of invalid login attempts

The lockout period can be temporary or require an admin reset. You can unlock a user by clicking Unlock on the user record.

Teaching Points

Extra Material

Suggestions

Confirming Security Settings

Password lockout occurs when you have a password policy to lock users out when they exceed a certain number of invalid login attempts. The lockout period can be temporary or require an admin reset. You can unlock a user by clicking **Unlock** on the user record.

***Your Name* | Setup | Security Controls | Password Policies**

Teaching Points

Extra Material

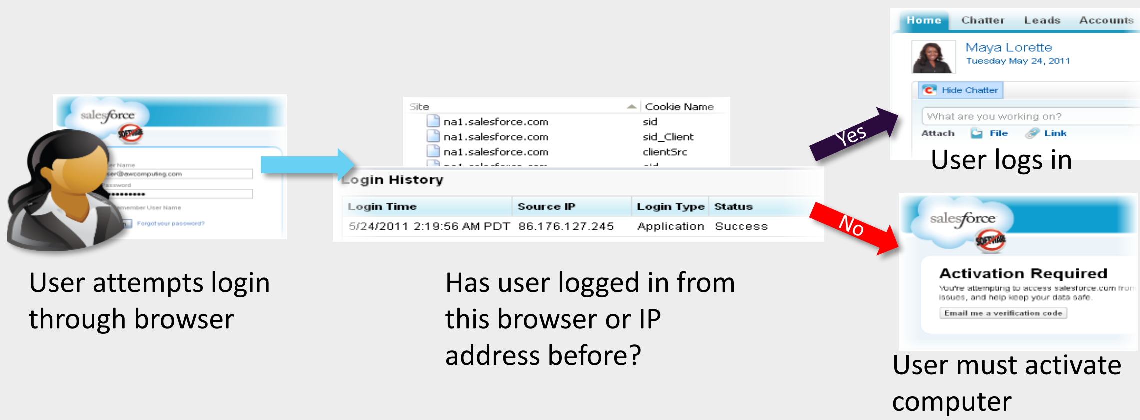
Suggestions

How does Login Work?

By default, Salesforce does not restrict the hours or the locations of user logins. When users log in for the first time:

- A cookie is placed in their browser.
- Their IP address is added to a trusted list.

When users log in again, Salesforce uses this information to authenticate them:



Teaching Points

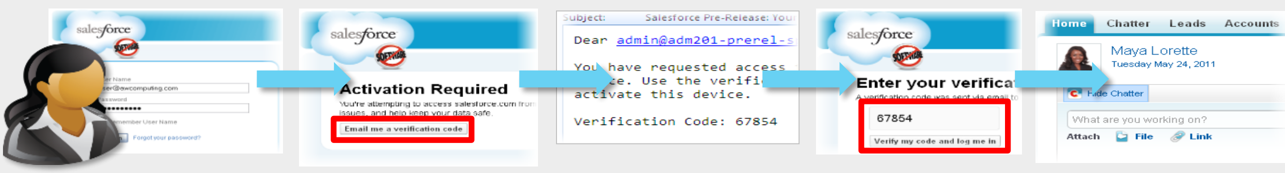
By default, Salesforce does not restrict the hours or the locations of user logins.
When a user logs in for the first time:
a cookie is placed in their browser, and their IP address is added to a trusted list.
When the user logs in again, Salesforce uses this information to authenticate them.

Extra Material

Suggestions

Activating an Unrecognized Computer

The activation process authenticates the user, adds the cookie, and adds the new IP address to the trusted list.



User logs in from unrecognized computer

User prompted to activate computer and clicks button to email verification code

User retrieves verification code from email

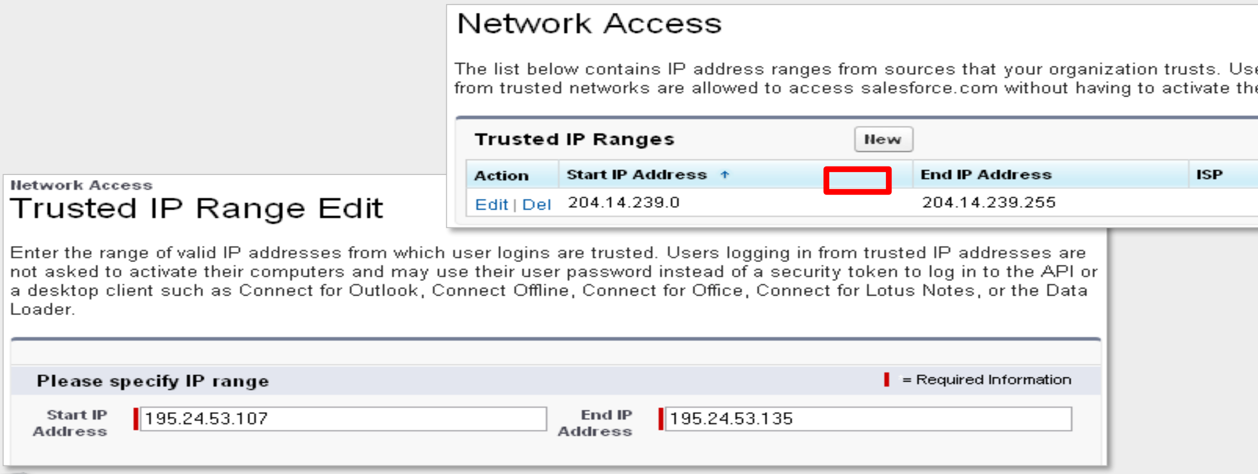
User submits verification code

User logs in

When a user attempts to log in from an unrecognised IP address using a browser that does not have the Salesforce cookie, they are prompted to activate their computer. This process authenticates the user, adds the cookie, and adds the new IP address to the trusted list.

Creating an Organization-Wide Trusted IP Address List

You can manually add trusted IP address ranges for your organization, which allow users to bypass the activation process.

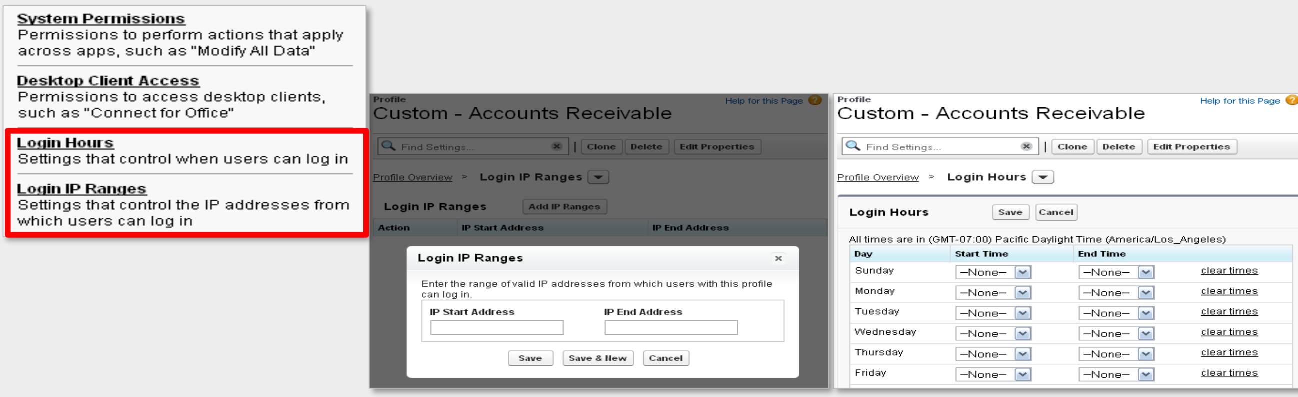


STOP Users can still log in from addresses outside these ranges through the activation process.

You can manually add trusted IP address ranges for your organization, from which users can always log in without having to activate their computers. This could be your office network or VPN. Note that users would still be able to log in from addresses outside these ranges through the activation process.

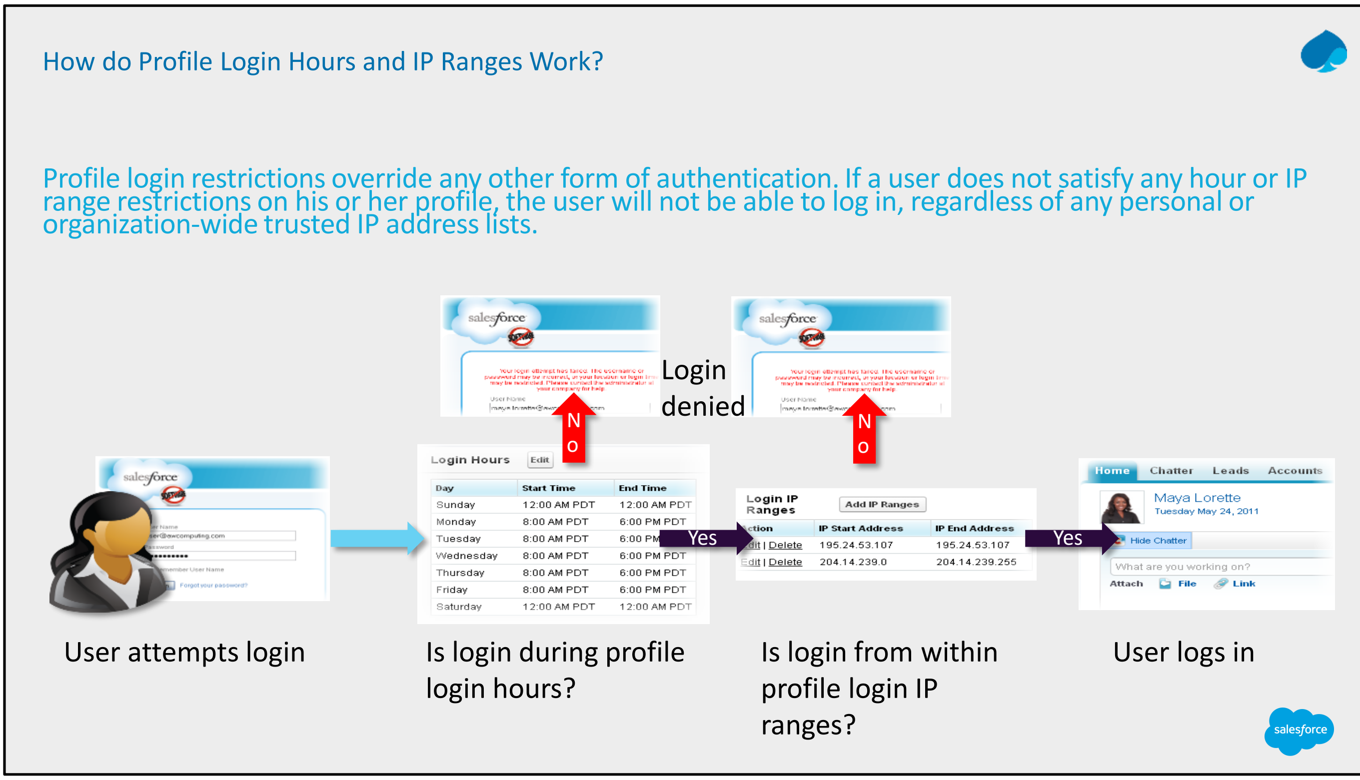
Restricting Login Hours and Login IP Ranges on Profiles

You can lock down access for particular groups of users by adding allowed hours and login ranges to their profiles. Users outside these hours or ranges will have their login denied.



Your Name* | Setup | Manage Users | Profiles | *Name of Profile

This could be used to allow office-based users access only through the office network and during office hours, but give remote users 24/7 access through a VPN.



If you want to allow for 24 hour access you need to specify that by using blanks. Choosing 12 AM – 12 AM effectively locks the user OUT.

Extra Material

Suggestions

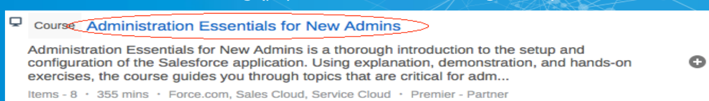
Data Migration
(Data Loader and Import Wizard)

Video – Managing Data

Learn how to configure the Salesforce application to suit your business needs, including how to administer standard fields and create custom fields and page layouts. In addition, you'll learn how to use record types and business processes, and how to maintain data quality and integrity using validation rules. (39 min)

How to Get to this training video ?

- You need an **@partnertraining.com account**.
- To avoid a mixup with saved credentials open a private window in a new browsr.
- Browse to http://help.salesforce.com and log in with your @partnertraining.com account.
- Search for "Administration Essentials for New Admins"
- Make sure to select this training (pay attention to the video logo):



- Select the module "Managing Data":
- Enjoy the 39 min video.
- Direct Link: (only works after you've logged in with your @partnertraining.com account, paste in browser) https://help.salesforce.com/HTTrainingModulesDetail?courseId=a1S30000000glS6EAI

Importing Data: Object Import Wizards

Salesforce provides wizards to import data for accounts and contacts, leads, solutions, and custom objects.

- Import wizards are **online** and **easy to use**.
- **Administrators** can import data for the entire organization in Setup.
- Users with the "Import Personal Contacts" permission can import their own accounts and contacts in My Settings.
- Users with the "Import Leads" or "Import Solutions" permissions can access respective wizards in Setup.
- Data can be imported from any **CSV** file.

Additional Import File Wizards

Rob should consider the following points when preparing the import file:

Points of consideration	Data Import Wizard
Data Validation	Import values should satisfy data validation rules.
Universally Required Fields (New Records)	Unmapped required fields will generate an error.
Owner Field (New Records)	If blank, importing user is set as owner.
Currency Field (New Records)	An unmapped currency field will generate an error.
Picklist Values	All values in any picklist field should also exist in Salesforce.

About the Data Loader

The data loader is a *client application*: It accesses Salesforce data from outside of Salesforce.

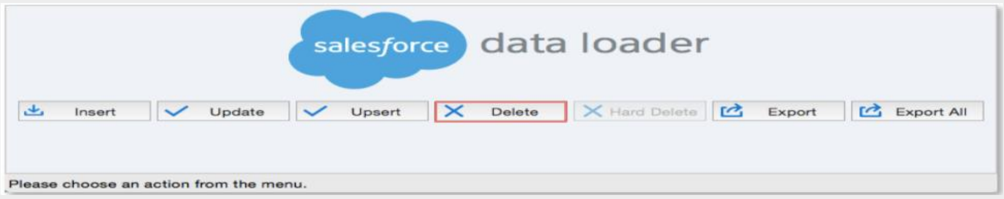
Because it is a client application, you *must log in* to the data loader with your username and password.

If you are logging in from an *untrusted location*, a *security token will be required*.

The data loader uses the *Salesforce API*. This is a set of rules that allow outside programs to interface with your Salesforce data.

Even though we don't go into a lot of detail here, it might be worth saying a few words about the security token, and how they can reset it.
More information on security tokens can be found in Help & Training.

Force.com Data Loader



The data loader:

- Uses an API that defines the rules for accessing Salesforce from external applications.
- Is a client application, so Rob should use his Salesforce credentials to log in.
- Requires a security token to log in from an untrusted location.

Data Loader and Import Wizards Comparison

If you want to . . .	Import Wizards	Data Loader
Import fewer than 50,000 records	✓	
Prevent duplicates when importing new records	✓	
Choose whether or not to trigger workflow rules	✓	
Load up to 5,000,000 records		✓
Load all objects		✓
Schedule imports		✓
Save mappings for later use		✓
Export or delete data		✓

Matching Fields and Duplicates

The matching type Rob selects for an import will be used to identify duplicates when he adds new records, or to match records when he updates existing ones.

Object	Matching Type
Contact	Salesforce ID Name Email
Account	Salesforce ID Name and Site
Leads	Salesforce ID Name
Solutions	Solution Title Salesforce ID External ID
Campaign Member Status	Salesforce.com ID
Custom Objects	Record Name Salesforce ID External ID

- Upsert creates new records and updates existing records; uses a custom field to determine the presence of existing records.
- Typical sequence of data loading:

1. Load users (must be done first to get back user IDs to related objects to users)
2. Add user IDs to accounts file and load accounts
3. Add user IDs and account IDs to contacts file and load contacts
4. Add user IDs, account IDs and contact IDs to case file and load cases

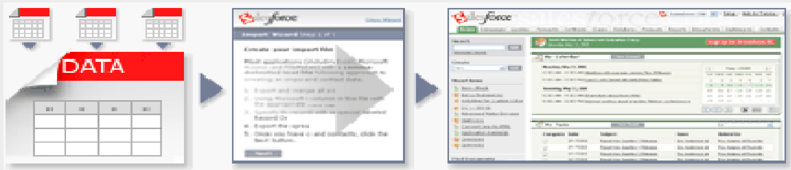
Considerations Data Migration & Data Quality

- Clean data before loading
- Data loading options: Import wizards, Data Loader, ETL Tools, Integration
- Use the Salesforce Bulk API for more than a few hundred thousand records for better performance
- Disable Apex triggers, workflow rules and validations during loads. Disabling Apex triggers, workflow rules and validations can dramatically speed up load throughput.
- Use the fastest operation possible: Insert is fastest, then update and then upsert
- When large volumes of data are added or changed, the search system must index that information before it becomes available for search by all users. This may take an extended period of time.

- Upsert creates new records and updates existing records; uses a custom field to determine the presence of existing records.
- Typical sequence of data loading:

1. Load users (must be done first to get back user IDs to related objects to users)
2. Add user IDs to accounts file and load accounts
3. Add user IDs and account IDs to contacts file and load contacts
4. Add user IDs, account IDs and contact IDs to case file and load cases

Importing Data with Wizards



Salesforce provides wizards to import data into both standard and custom objects.

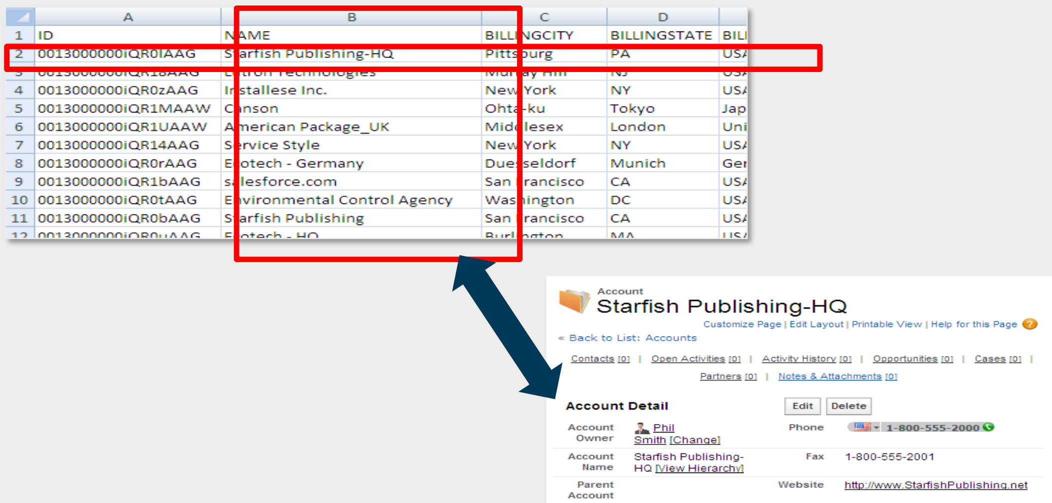
- **All users** can import their own accounts and contacts.
- **Administrators** can import accounts, contacts, leads, solutions, or custom objects for the organization.
- Data can be imported from any CSV file.
- You can choose whether or not to trigger workflow with the import.

Personal import: ***Your name* | Import | Import My Accounts & Contacts**
Organization import: ***Your name* | Data Management | Import <<*name of object*>>**

All users can import their own accounts and contacts in the Personal Setup area, under Import My Accounts and Contacts, 500 records at a time.
The user chooses to match either by name or email.
Admins import for the entire org under *your name* | Setup | Data Management, 50,000 records at a time.
Matched by Salesforce ID, name, email or by name and site (for accounts).

What Does an Import File Look Like?

Each row in the CSV import file corresponds to a record, and each column corresponds to a field.



Teaching Points:
This is the same image used to describe an object in Salesforce in module 1.
If columns in the import file do not exist as fields in Salesforce, they need to be created prior to import.

Extra Material:
(Links, keywords, help)

Suggestions:
Use a list view to illustrate what a data file could/should look like.

Prepare the Import File

One way to ensure clean, accurate data in Salesforce is to check the data beforehand. Make sure any data imported into Salesforce is clean by:

- Resolving any duplicate records.
- Removing blanks and empty spaces.
- Running spell check.
- Renaming column headers to match the field names in Salesforce.
- Applying consistent standards for data formats.

Example: USA instead of US or United States

Look up the key words “Importing Overview” in Help & Training.

Additional Import File Considerations

- **Data Validation**: If the import values don't meet the data validation criteria, import will fail on that one record.
- **Required Fields**: If you have required fields that are blank, import will fail on that one record.
- **Owner Field**: If this field is left blank, the user doing the importing becomes the default owner.
- **Currency Field**: If the currency field is left blank, the designated corporate currency will be the default currency.
- **Picklist Values**: Make sure all values in any picklist field also exist in Salesforce. Otherwise, new values will be imported only for the records in the import file, and the value will not be available to other records.

12

Teaching Points:

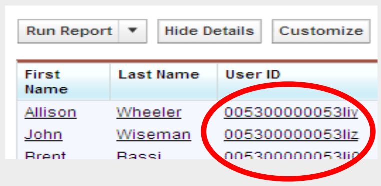
Extra Material:
(Links, keywords, help)

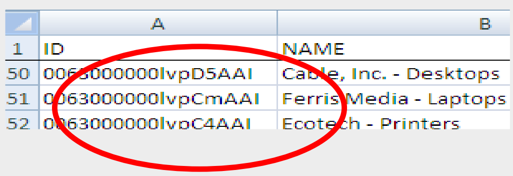
Suggestions:

Matching New Information to Existing Records

When updating existing records, ensure that new data is being matched to the correct record by using the Salesforce record ID. This ID is a *unique identifier* that is *generated by Salesforce* when a new record is created. The Salesforce record ID can be obtained from:

- The record URL
- Reports
- A data loader export file





Teaching Points:

Extra Material:
(Links, keywords, help)

Suggestions:
(Use cases, whiteboard examples)

Data Import: Best Practices

- Create any necessary fields prior to the import.
- Clean up data prior to import.
- Export any necessary record ID fields.
- Prepare and upload a test batch.
- Do not perform updates to existing records during normal business hours in order to minimize the possibility of users modifying records while you are simultaneously updating them.
- Turn off workflow rules before running any import, update, or upsert operation.

Teaching Points:
(What concepts are covered on this slide)

Extra Material:
(Links, keywords, help)

Suggestions:
(Use cases, whiteboard examples)

Backup Options

Backing up data is a regular part of any administrator's job. Data should be backed up on a regular basis, and before any major import or export operations. There are several ways to back up data in Salesforce:

- Reports
  - Export specific data to Excel.
  - Process can be manual or automated.
- Data loader
  - Export specific data to CSV, Excel or another database.
  - Process is manual.
- Weekly data export service
  - Obtain a complete set of Salesforce data for archiving.
  - Process is automated.

Teaching Points:
(What concepts are covered on this slide)

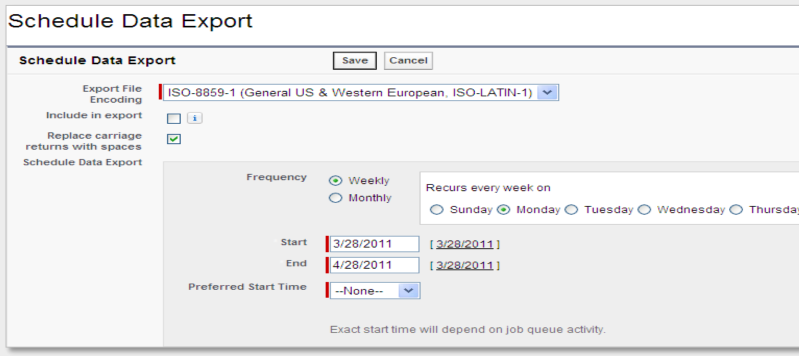
Extra Material:
(Links, keywords, help)

Suggestions:
(Use cases, whiteboard examples)

Data Export Service

The data export service is an automated way of receiving a zip file of CSVs of all of your Salesforce data. The data export service:

- Is available within the application.
- Can be scheduled.
- Emails you when the zip files are ready.



Zip files are deleted after 48 hours, regardless of whether or not you have downloaded them.

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Teaching Points:
(What concepts are covered on this slide)

Extra Material:
Weekly export available in: Enterprise and Unlimited Editions
Monthly export available in: All editions
Search for “Exporting Backup Data” in Help + Training

Suggestions:
(Use cases, whiteboard examples)

Mass Delete Records

The Mass Delete tool allows you to delete standard object records that meet specific criteria.

- A list of all records to be deleted will display, giving you the opportunity to check the deletion for accuracy.
- The tool will alert you of any child records that would also be deleted.
- Best practice is to request or perform a backup before using Mass Delete.
- Deleted records are stored in the recycle bin for another 15 days, unless you choose "Permanently delete."

Your name **| Data Management | Mass Delete Records**

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Teaching Points:
Mass Delete Records will delete accounts, leads, activities, contacts, cases, solutions and products.
When deleting objects, related objects are deleted as well. Review the relationship between accounts, contacts, opportunities, activities and notes.

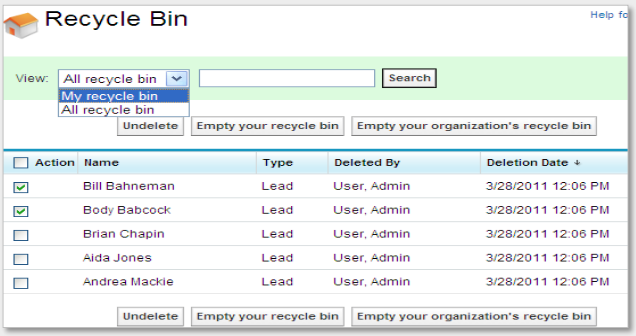
Best practice: Discuss with students that when deleting imported records in a scenario like this it is important to make use of the filter to ensure the correct records are deleted. For example:
1. Filter on the created date and time.
2. Create a hidden custom "batch number" field on the object you import into and populate this field in your import file. You can then also filter on this batch number if you need to delete the imported records.

Extra Material:
(Links, keywords, help)

Suggestions:
Use the data model cards to review the parent child relationship, and discuss what related objects are deleted.

Recycle Bin

- Deleted records are stored in the recycle bin a maximum of 15 days.
- Records can be restored by clicking **Undelete.**
- "My recycle bin" is available to all users.
- "All recycle bin" is available only to users with the "Modify All Data" permission.



Teaching Points:
(What concepts are covered on this slide)

Extra Material:
Your recycle bin record limit is 250 times the Megabytes (MBs) in your storage. For example, if your organization has 1 GB of storage then your limit is 250 times 1000 MB or 250,000 records. If your organization reaches its Recycle Bin limit, Salesforce automatically removes the oldest records if they have been in the Recycle Bin for at least two hours.

Suggestions:
(Use cases, whiteboard examples)

Hands-On Exercise

View and Complete Exercise Guide “Managing Data Exercise Guide”

https://lms.cfs-api.com/v1/content/9df91c2c-0cd1-4917-8bd2-a17d9785f573/presentation_content/external_files/managingdataexerciseguide.pdf

6-1: Prepare the Import File

6-2: Import Leads Using the Data Import Wizard

6-3: Export Using Data Loader

6-4: Match Record IDs to Accounts

6-5: Update Using Data Loader

6-6: Deactivate a User, Mass Transfer Records

6-7: Schedule Weekly Backup

6-8: Mass Delete Records

Link is also in Video

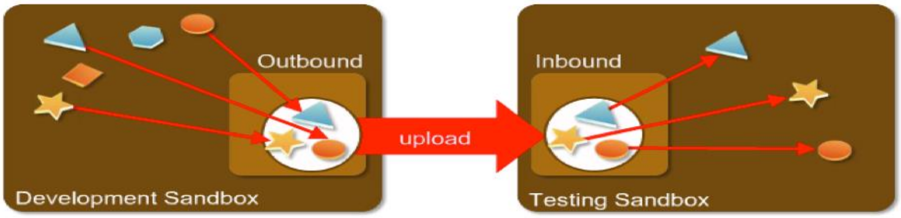
Migrating Configuration Changes

Change Sets

Change set:

- Is a point-and-click interface to move metadata between related organizations.
- Moves only metadata and not data.

Deployment Through Change Sets



Some considerations when using change sets:

- Apex code must meet unit test requirements.
- The system detects any incompatibilities between versions.
- Manually migrate components and changes that can't be included.
- The ability to work with change sets is controlled by profile permissions.
- A change set is deployed in its entirety or not at all.

Thank you