User Management

Add new users

Setup->Users takes you to user management settings. Here you can create one or more users, reset passwords for selected users, view a user's detail page, edit a user's details, log in as any user if the system permission is enabled or if the user has granted you system administrator login access.

Though you cannot delete a user, you can deactivate an account so a user can't log in. You can also freeze and unfreeze user accounts by deselecting the active checkmark.

Company-Wide Org Settings

How will configuring your company settings affect end users?

Company settings are the collection of information about your organization. Salesforce locale settings determine the display formats for date and time, users' names, addresses, and commas or periods in numbers. Admins set the default locale but users can set a personal locale if they're based in a different location.

Update company information through Setup->Company Information. This allows for updates to things like address, time zone, fiscal year, etc.

Update personal locale and currency through My Settings->Language and Time Zone.

Using a single currency vs multiple currencies

Doing business in a currency familiar to users and customers removes an unnecessary hurdle and cuts down on calculations.

The admin sets the "corporate currency" which reflects the currency of the corporate headquarters. You can also add multiple active currencies which is enabled through Setup->Company Information->Activate Multiple Currencies.

In Setup->Manage Currencies you can also edit the conversion rate between each currency. Additionally you can enable advanced currency management. Advanced currency management impacts current and closed deals, for example if you update the exchange rate in Jan and then again in Feb that means Jan will use one rate while Feb uses the other.

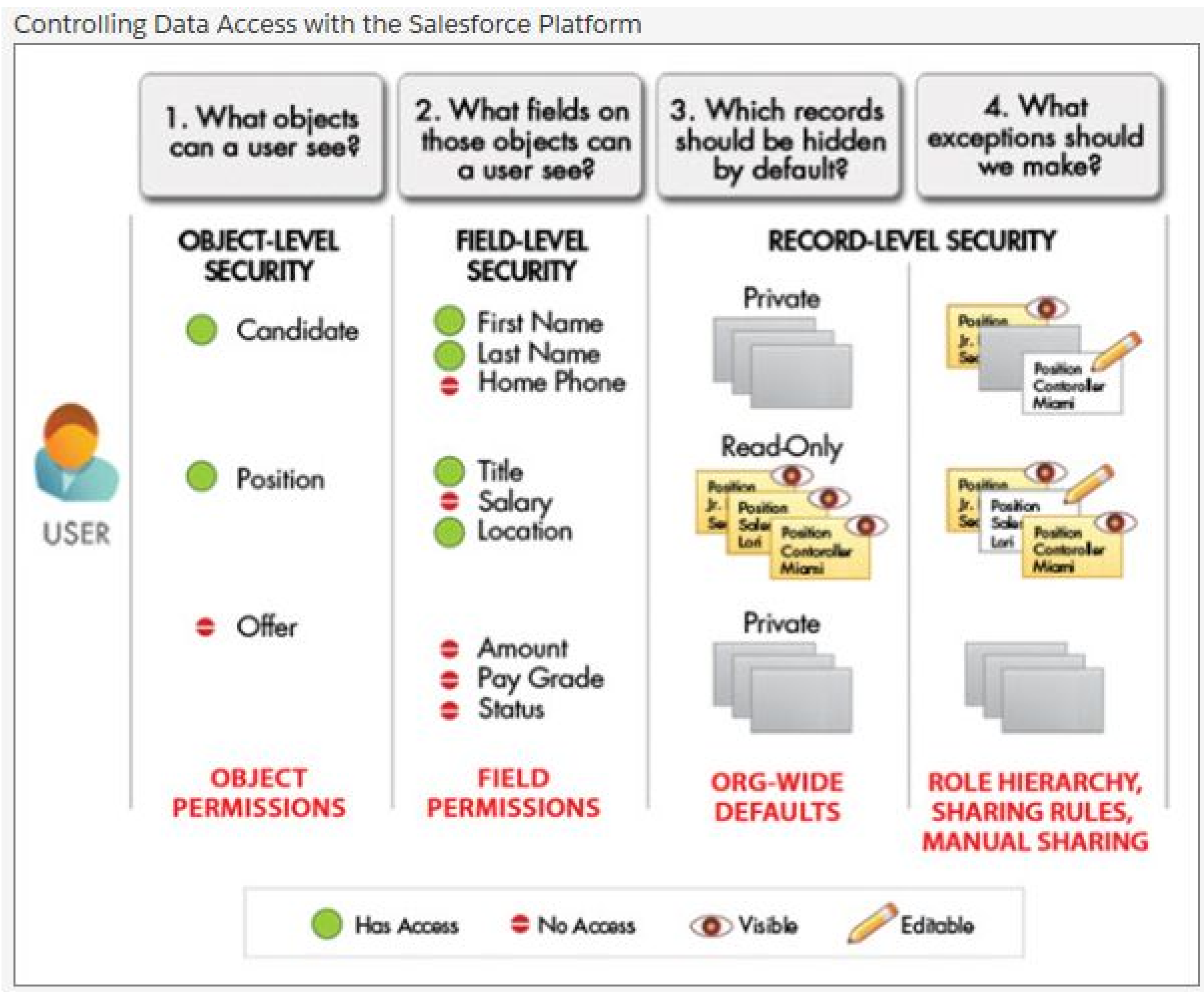
Data Security

Overview

Choosing the data set each user or group of users can see is one of the key decisions that affects the security of your Salesforce org or app.

There are four main levels of data access in Salesforce: Organization, Objects, Fields, Records. For Records you can set organization-wide defaults, role hierarchies, sharing rules, or manual sharing.

For Organization-Wide sharing defaults the options are private, public read only, public read/write, controlled by parent.



Control access to the Org

When you ensure only employees who meet certain criteria can log in to Salesforce you're protecting data at the broadest level. You can do this by managing authorized users, setting password policies, and limiting when and where users can log in.

Password policies

You can configure settings to ensure that users' passwords are strong and secure. You can specify an amount of time before all users' passwords expire and the level of complexity required for passwords under Settings->Password Policies. You can expire the passwords for all users except those with "Password Never Expires" permission. You can reset an individual user's password. You can unlock a user who locked themselves out due to too many failed login attempts.

Restrict login access by IP Address

You can control where users login from, eg disallowing login from outside corporate firewall. To do this for the entire org use Setup->Network Access. To do this for a profile, find the name in the Profiles tab for the profile you want to edit. Click New in the Login IP Range related list. Enter the start and end point of the range of trusted IP addresses and save.

Restrict login access by time

Setup->Profiles find the profile you want to change. Under Login Hours click Edit and set the days and hours when users with this profile can log in to the organization. To allow users to login at any time click Clear All Times. To prohibit users from using the system on a specific time set the start and end times for that day to the same value.

Control access to Objects

The simplest way to control data access is to set permissions on a particular type of object. You can control whether a group of users can create, view, edit, or delete any records of that object. Permission sets grant additional permissions and access settings to a user. System Administrators profiles include special permissions: View All Data, Modify All Data.

You can create custom profiles and permission sets, and the easiest way to do so is to clone an existing profile or permission set and modify it how you wish.

Control access to Fields

If you want users to have access to an object but limit access to individual fields use field level security settings, or field permissions, to control whether a user can see, edit, and delete the value for a particular field.

This requires Setup->User Management Settings->enabled Enhanced Profile User Interface. Then go to Profiles in Setup, select the profile you want to change, and click Object Settings to update.

Control access to Records

Record access is handled in four ways: Org-wide defaults specify the default level of access. Role hierarchies ensure managers have access to the same records as subordinates. Sharing rules are automatic exceptions to org-wide defaults for particular groups of users. Manual sharing lets record owners give read and edit permissions to users who might not have access to the record any other way. These are edited through Settings->Sharing Settings.

Create role hierarchy

Users can access data of all users directly below them in a hierarchy. To define a Role Hierarchy from Setup->Roles. Roles are viewed in a tree based diagram stemming from the company name. You can add new rolls directly under their supervisor.

Extending access with sharing rules

Sharing rules make automatic extensions to the org settings with criteria based rules. This access can either be Read-Only or Read/Write. Before creating a sharing rule it is important to set up a public group which is a collection of users, groups, roles that have a common function. Then in Settings->Sharing Settings go to the Manage sharing settings and choose an object. In the Job Application Sharing Rules area click New and give it a name.

Products, Quotes, & Contracts

How products and price books work together

Product records include details such as name, code, description, whether it is active, and standard price which is established during creation. Those product then appear in the standard price book, which can be thought of as the master book of all products. You can create multiple price books for situations such as when selling to domestic and foreign customers use a different price.

To create a Price Book go to the Price Book Object and click new. Enter the specifics and then go to the related tab to add products.

Quotes, quote templates, and contracts

Quotes must be enabled by Setup>Quotes Settings->Enable. After that quotes can be created from Opportunities. Admin can create quote templates through Setup->Templates->Quote Templates. When a quote is completed it saves a PDF which can be sent to the customer.

Service Cloud for SF Classic

What is Service Cloud?

Service Cloud is a customer service and support application. Sometimes a single agent can solve a case in a single transaction, but if cases require input from a bunch of people then you want to create a team. You can create roles from Setup->Case Team Roles and create a team from Setup->Predefined Case Teams.

To be able to view case teams you must add the Case Team related list to case page layouts by Setup->Customize->Cases->Page Layouts. Edit and drag Case Team from Related Lists. Save.

Case Automation

Case Queues allow management of a shared workload. To create Setup->Queues and select New. You can create assignment rules from Setup->Case Assignment Rules to automate which queues cases go to. You can also include auto-responses through Setup->Case Auto-Response Rules. You can choose when cases escalate through Setup->Escalation Rules.

Customer Channels

Gives customers a choice in how they communicate with company. The Service Cloud gives customers a variety of choices with how they can reach out to your company: phone, email, website, social media, online communities, etc.

Web-to-Case: essentially a form of case fields that customers fill out and submit to agents. Decide which case fields display on form, generate HTML for form, and have HTML put on company's website. Access through Setup->Web-to-Case.

Email to case has two options: Email-to-Case or On_Demand Email-to-Case.

Email-to-Case	• Keeps all email traffic within your network's firewall. • Accepts email attachments larger than 25 MB. • Requires downloading and installing the Email-to-Case agent to your network.
On-Demand Email-to-Case	• Sends all email traffic outside of your network's firewall. • Accepts email attachments smaller than 25 MB. • Uses Apex email services to convert email to cases.

Community Cloud Basics

Introduction to community cloud

Think of the community cloud as a portal, help forum, support site, HR central, or something similar. It is an online community that improves engagement with customers, partners, and employees. Can create customer service and account portals, partner relationship management and channel sales, employee relationships.

Knowledge Search Basics

What is Knowledge Search

Salesforce search is powered by an engine that brings smart, relevant results automatically. You can also use logical operators to modify results. Spell Correction corrects spelling errors, lemmatization returns variants of the word, and synonym groups return terms in a group.

Knowledge Settings

Access through Setup->Knowledge Settings. You can enable snippets and highlighting which will show excerpts of the search context on the search results. Auto-complete will allow suggestions to appear as users type their queries. Auto-complete can be enabled for keyword search or title search, or both.

Promoted search terms

Helps optimize search results. Useful when an article addresses a common issue, you can associate keywords with it to return it as a first result. Setup with the Article Management tab->Published Articles in the View, then click the title of the published article for which you want to promote a search term. In the Promoted Search Terms related list select New Promoted Term and enter keywords that you want to associate with the article.

Create synonym groups

If your org uses similar but not exact words for the same thing, or a product is known by different names in different countries, synonym groups can help. Setup->Synonyms New allows you to start a synonym group, or Edit to edit existing. You can add two to six synonyms per group.

Customize suggested articles based on case fields

Suggests articles for cases based on the case subject and description. Setup->Support Settings->Edit->Early Triggers Enabled->choose Enable suggested articles. Note that you cannot enable suggested articles and suggested solutions at the same time. You will also need to update the page layout for cases to include Knowledge Sidebar.

Knowledge Search Activity report

Generates a report giving you information on what is being searched. Access with Setup->Report Types->New Custom Report Type->Knowledge Search Activity. Results include: average click rank, channel, clicked article title, duration, language, number of search results, number of searches done for given duration, search date, search term.

You can use this information to create better synonym groups, improve articles, and promote search terms.