ORG

Complete data file  
- Standard objects  
Company profile  
Adding users – manage user, fill form – postal info. Prequeties: License and then profile.  
What things are controlled in profile – system features(sale, service, account)  
Sales service we call it as Apps  
  
Restriction that we can set for user  
 - Org level security(are u allowed to login to SF)  
 - Trusted IP range  
 - Login hours can be defined. Whatever the time is mentioned, we need to login in that timeframe.  
 - Record level security – how many records you are allowed to view. If you own the record, you can view, edit, delete…. If you don’t own the record then org wide level default(OWD) will be set(public, private, public read write).  
 - Two types of sharing rules. Criteria and ??  
 - Manual sharing button will be shown to admin, owner of the record and folks above owner level.

Standard/Custom fields.

Page layouts  
 - one page layout and one object.  
 - One profile can see only one page layout.  
 - If one user has to view multiple page layout then it should be record type

Opportunity, lead, case, solution – only for these 4 objects record type been created.

Field history tracking  
 - Tells u who made any changes to be field, when and what’s the last and current value.  
 - 20 fields per object, it can be custom or std.  
 - 18 months history is maintained  
 - recycle bin – data stays for 15 days.

Validation rules  
 - if not met record cant be saved

Reports  
 - Formula calculation displayed in Summary report

Dashboard  
 - custom reports are used in dashboard

* **What is determined by running user of the dashboard? – VERY IMPORTANT**  
  running user name will be displayed and it will be same for everyone. Snapshot will be static for everyone. Name of the dashboard creator will not change irrespective of any user view the dashboard. COMMENT MIGHT BE WRONG. READ PROPERLY-
* **Table and chart** can display data from the summary rows of reports

Printtable list view and related list hover links are setting can a system admin enable in user interface

**Name, date, address and the number will change when the default locale settings is changed.**

1. Go to setup
2. Search for “Lightning App Builder” in Quick Find
3. Click New
4. Select home page
5. Next “Support Home Page”
6. Finish

Apex and Visual Force

Setting up and managing users

1. All the settings that u apply will be for group of users

Login to SF  
Click Setup  
ADMINISTRATIONS > USERS> Users

Types of user  
System administrator  
Standard user  
Solution manager

**Type of user in chatter**Chatter Freed  
Chatter External User  
Chatter moderator

**Creating new user**

1. If the user been set to Freeze – user can login but license will stay with him
2. If the user been set to deactivate – user can’t login, license can be assigned to someone else.

First level of security is org  
**Org**

Login Ip range  
Trusted level ip. We can add a restriction in ip range. If no ip then activation code via sms.

Login hours  
It will check out if we are idle for xx mins.

**Profile**  
Lightening classic  
1. Manage Chatter group

1. Mass email

Opportunities - Whatever I own I can see it for sure.

My models are private which means only owner can create, delete, transfer whereas others can only read (view only).

Workflow rules – 4

Process builder - 8

1. Post to chatter
2. Create
3. Launch a flow
4. Call Apex
5. Submit for approval