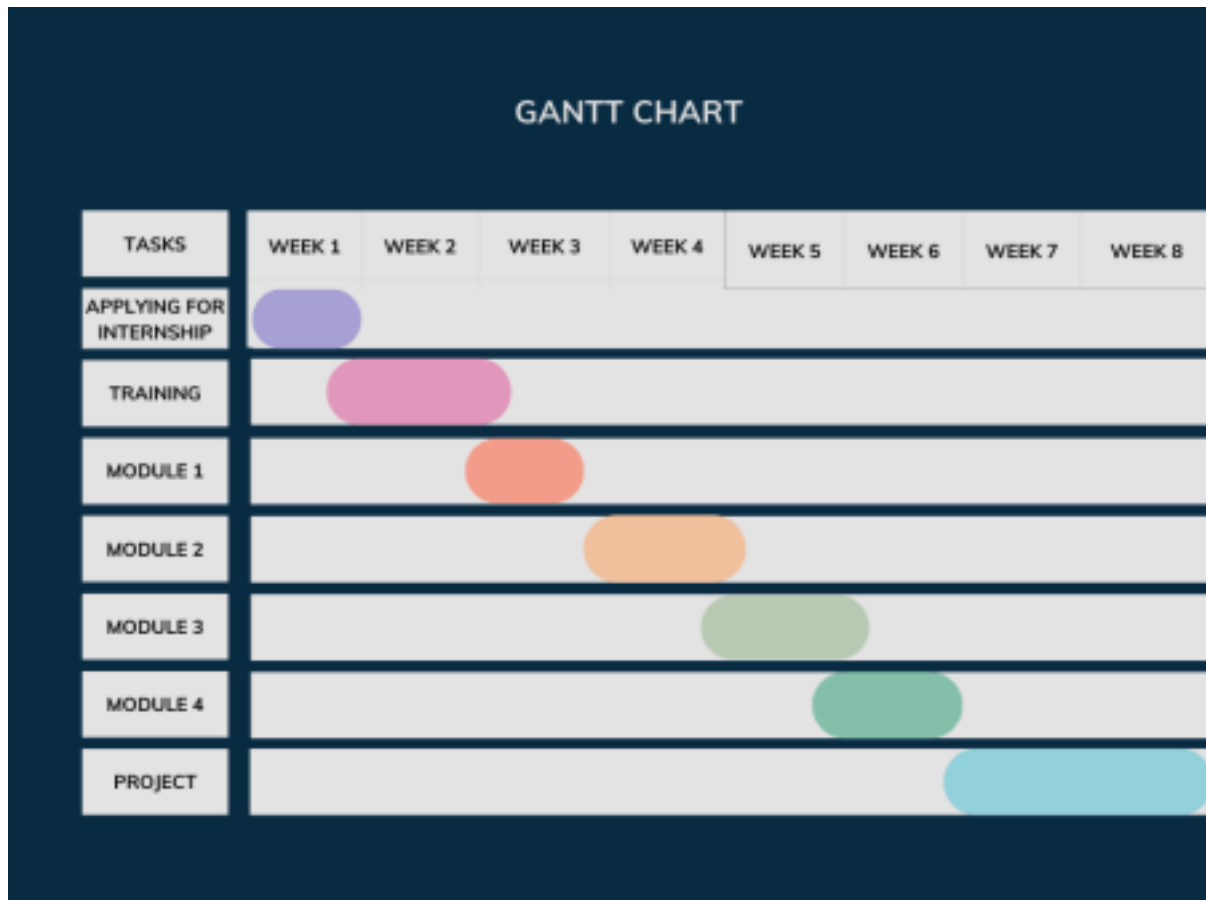# ORGANIZATION PROFILE

SmartInternz is an Experiential Learning & Remote Externship Platform to bring academia & industry very close for a common goal of talent creation. The company is a comprehensive one-stop platform catering to the skill & knowledge development of young graduates turning professionals. They host smart solutions for students that bridge the gap in the transition phase from academics to the workplace. The main objective is to bridge the existing gaps between prevailing industry standards and what academics offer to graduates while passing out of university. SmartInternz offers suitable skill development and training to young talent before onboarding their first job. The skill development programs are designed considering the present expectations in the industry. We thereby work along the lines to offer the best programs.

The Smartinternz website link is https://smartinternz.com/. The company comes under E-Learning Providers. The company was privately held and located in Hyderabad. Salesforce is a customer relationship management solution that gives every business team—from sales and marketing to commerce, service, and beyond—a single, shared view of every customer. Salesforce is an American cloud-based software company headquartered in San Francisco, California. It provides customer relationship management (CRM) software and applications focused on sales, customer service, marketing automation, analytics, and application development. Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

The Salesforce ecosystem is growing and is expected to create 0.5 million jobs in India by 2025. We're inviting all students to embark on this online journey where we'll provide curated content to help you learn the Salesforce skills that employers seek.

The Salesforce website link is http://www.salesforce.com.The company comes under software development. The specialties are Enterprise Cloud Computing, CustomerRelationship Management.

GANTT CHART

ABOUT SALESFORCE

Salesforce provides a robust set of automation features to help you save time and resources. Use Flow Builder to automate most of your organization's repetitive business processes. More features can provide further automation functionality, including approval processes, Flow Orchestration, Einstein Next Best Action, and Apex. Salesforce Automation is part of the Salesforce Platform offering that specializes in business process automation. It helps in automating repetitive tasks like creating records based on lead acquisition, and sending scheduled or triggered. An automated action is a reusable component that performs some sort of action behind the scenes—like updating a field or sending an email. After you create an automated action, add it to a process, milestone, or another automated process. communication, creating approval workflows, etc.

RB Robotics makes and installs automated assembly systems for US factories. Until last year, sales were strong and steady. Then the founder's eight-year-old granddaughter built a multicolored wheeled robot for her school science project, and on a whim, the founder added the design to RB's list of products. To everyone's surprise, those sassy Rainbow Bots became a smash hit. Toy stores, online retailers, and maker fairs can't keep them in stock. The Rainbow Bot publicity has created a fresh buzz around RB's traditional assembly system products as well. Sales in both divisions are booming, and the company is scrambling to keep up with demand.

Salesforce is a famous American cloud-based software company that provides CRM services. Salesforce is a popular CRM tool for support, sales, and marketing teams worldwide.Salesforce is designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce services allow businesses to use cloud technology to better connect with partners, customers, and potential customers. Using the Salesforce CRM, companies can track customer activity, market to customers, and many more services.

A CRM platform helps you go deeper with all your metrics and data; you could also set up a dashboard that showcases your data visually. In addition to this, you can also have personalized outreach with automation. Another significant benefit is that a CRM platform can also improve customer service's ability to help customers or a sales team's outreach efforts.

CRM provides a single unified platform for every type of organization, whether you are a nonprofit or educational institution, and in every department.The benefits of a CRM is to gather the wealth and depth of information.

SalesForce Products and Services

Salesforce includes the following products and services.

1**.** Salesforce Applications

Salesforce includes pre-built applications for customer relationship management (CRM) ranging from sales force automation to partner relationship management, marketing, and customer service.

2. Lightning Platform

The Lightning platform is the first platform as a service (PaaS). Developers can create and deliver any kind of business application entirely on demand and without software. The platform also includes easy to use point-and-click customization tools to help you create solutions for your unique business requirements, without any programming experience.

3. Appexchange

AppExchange is a marketplace featuring hundreds of cloud applications created by Salesforce customers, developers, and partners. Many of the applications are free and all of them are pre-integrated with Salesforce, enabling you to easily and efficiently add functionality.

Salesforce.com Community:

Salesforce provides training, support, consulting, events, best practices, and discussion

boards to help you be successful. Moving on, you will explore the Services offered by Salesforce:

● SAAS (Software As A Service): Here, you can directly obtain the built-in software and make use of it.

● PAAS (Platform As A Service): PAAS offers you the framework and platform to build your websites and apps.

● IAAS (Infrastructure As A Service): IAAS plays a vital role in Salesforce development, although not very widely used.

Sales force is cloud-based software as a service provider that offers many solutions that aid organizations in conducting their business smoothly. Sales force started with customer relationship management software and later expanded to sales cloud, marketing cloud, analytics, business process automation, etc. Sales force services help an organization acquire leads, nurture them to opportunities, convert them to customers, service the customers and then maintain the relationship.

Picklist helps with data entry and standardizing input values. Picklist guides the user to values they need and makes data entry quicker. The picklist is not ideal for long entries or values that are not unique. picklists represent a predefined list of values for users to choose from when inputting data into a field. Reminiscent of the way data in a cell can be validated from an array of values in Microsoft Excel, picklists will please reporting teams.

CHAPTER 1: INTRODUCTION

A Salesforce Picklist can be defined as a menu consisting of a value set and a field that lets users select an option from a predefined list of values. Salesforce offers certain picklists that come standard with it like the Opportunity Stage Picklist. The interesting thing is that you can create custom picklists based on the specific requirements and processes of your organization.

Salesforce custom picklists are one of the most underutilized and complex features of Salesforce. At their core, picklists are the simple dropdown menus of options. However, things can be difficult to understand and manage if you are not aware of how the pick lists were set up and what they are connected to. If you need to add an additional value after having some current values in a multi-select or a single pick list field, you can navigate to the "Fields & Relationships" area of the relevant object from the Object Manager in the Setup Menu. You can then click into the multi-select/picklist field in question and choose the "New" button to start adding new values.

For this, you can enter each value on separate lines. You would be required to choose the Record Type if using multiple record types on the object where the new values should be displayed. Thereafter, you will need to click the "Save" button. Salesforce Picklists are made up of a list of "Picklist Values" or options. These values may have to be updated as the business changes and grows; they can be edited directly if there is a minor name change.

1.1 WHEN TO USE A PICKLIST

When you're at a bakery ordering cookies, you want to know what kinds of cookies they have instead of just guessing what to order.

1.1.1 ANATOMY OF A PICKLIST

Picklists have two parts.

Fig 1.1.1:Anatomy of a picklist

The field (1) defines the type of picklist. Can users select more than one value? Is this field dependent on another field for its value set? You set those options, and more, at the field level.

The value set (2) defines the choices a user sees, their order and the default value, and other settings.

Pretty basic, but this is an important distinction. You manage these two parts separately. For now, we focus on the field. In the next unit, you focus on the values.

We have three types of picklists:

1. Standard
2. Custom
3. Custom Multi-Select

And picklist fields can have the following properties:

- Restricted
- Dependent or Controlling

Values can be defined three ways:

1. Set individual values when you create the picklist. These are specific to a single picklist field.

2. Use the built-in set of values for the standard picklist fields that come with your Salesforce org.

3. Create a global value set. A global value set is a custom set of values you create to share with more than one picklist field.

Let's take a look at the different varieties of picklist fields. We cover values in a later unit.

1.1.2 STANDARD PICKLIST

Standard picklists are the ones that are included in your Salesforce org before any customization. Examples include the Lead Source picklist on the Lead object, the Opportunity Stage picklist on the Opportunity object, and others.
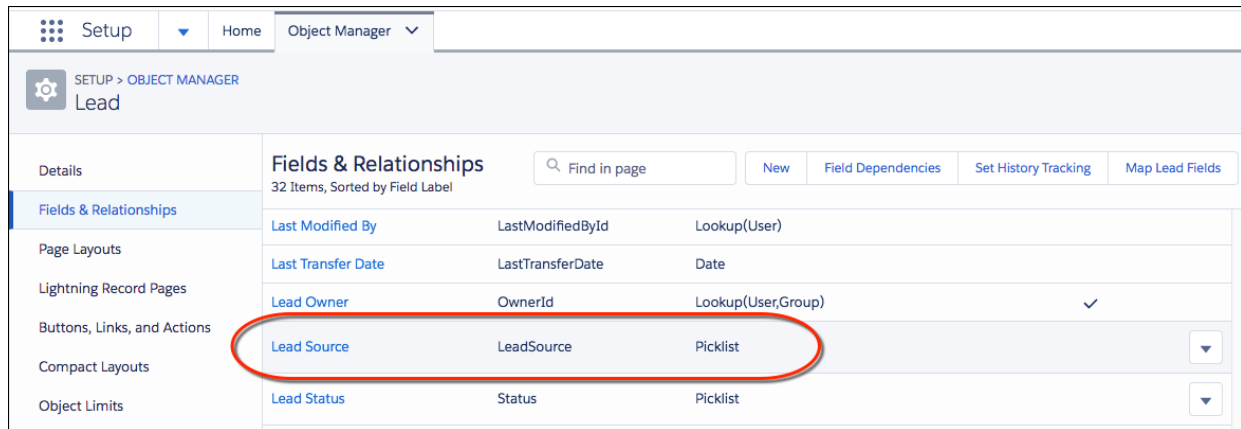
Fig 1.1.2: standard picklists

Standard picklist fields are included for the common fields you likely want on standard objects that come with your org.

Standard picklist fields sometimes share a standard value set. For example, on the Lead object, the Lead Source picklist values are part of a standard value set. The same values are also used on the Account object for the Account Source picklist field. When you change a value from that set in the Lead Source picklist settings, the change also appears in the Account Source picklist field values.
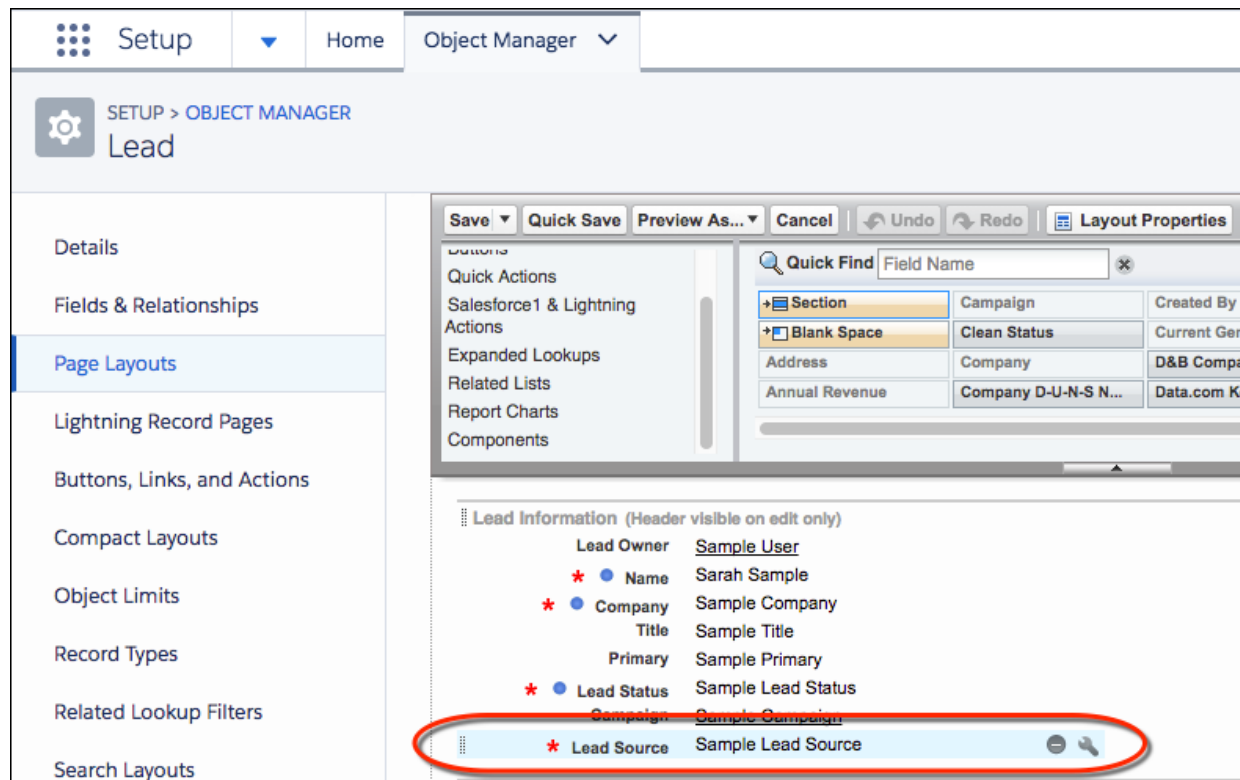
Fig 1.1.2: standard picklists fields

For more flexibility, you need a custom picklist field.

1.1.3 CUSTOM PICKLIST

Custom picklists are the ones you create. You can add your own values and configure a custom picklist's behavior. As you create a new custom field, select Picklist as the field type.

Here are the steps to create a custom picklist. You can do more customization later.

1. In Setup, click the Object Manager tab, and then select the object to contain the picklist field.

2. Click Fields & Relationships.

3. Click New. Select Picklist, and then click Next.

4. Enter a Label for the picklist field. The Field Name is automatically assigned. The Field Name is often also called the "API name" since it's a way to reference the field programmatically.

5. Select Enter values, with each value separated by a new line.

6. Enter your values.

Product
New Custom Field   Help for this Page ?

| Step 2. Enter the details | Step 2 of 4 |

Previous   Next   Cancel

Field Label | Macaron Flavor | i

Values   ○ Use global picklist value set

● Enter values, with each value separated by a new line

Gingerbread
Strawberry
Chocolate
Raspberry

☐ Display values alphabetically, not in the order entered
☐ Use first value as default value i
☑ Restrict picklist to the values defined in the value set i

Field Name | Macaron_Flavor | i

Fig 1.1.3: custom picklists

7. Optionally, sort the values alphabetically or use the first value in the list as the default value, or both. If you select both options, Salesforce alphabetizes the entries and then sets the first alphabetized value as the default. You can use a formula to assign a default value dynamically. We get into that later.

8. Choose whether to restrict this picklist's values to an admin-approved list. This is where you can decide this should be a restricted picklist. You can change it later if you find that you do need to accept new values in the field.

9. Click Next.

10. Set field-level security for the picklist field, and then click Next. This list determines

who can see or edit the field.

11. Choose the page layouts on which to include the picklist field.

12. Click Save.

Identify existing custom picklists on an object's Fields & Relationships page. Like other custom fields, a custom picklist's Field Name ends with __c.
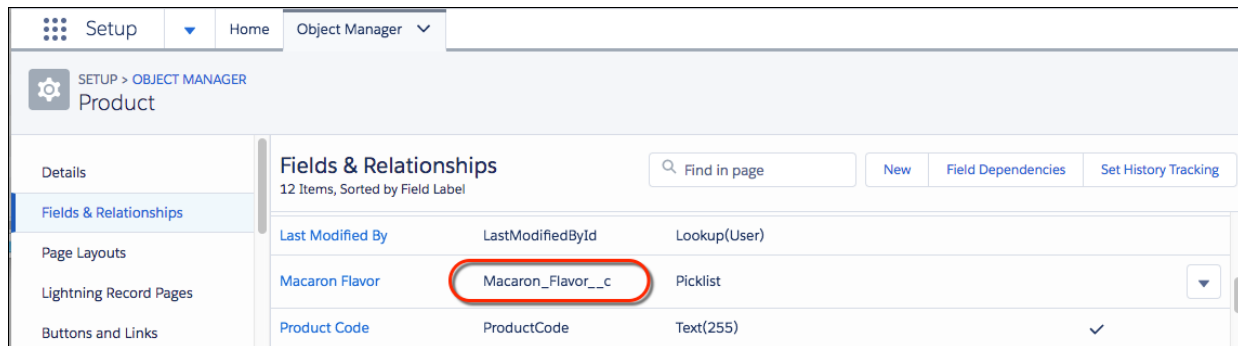
Fig 1.1.3: custom picklists fields

1.1.3 CUSTOM MULTI-SELECT PICKLISTS

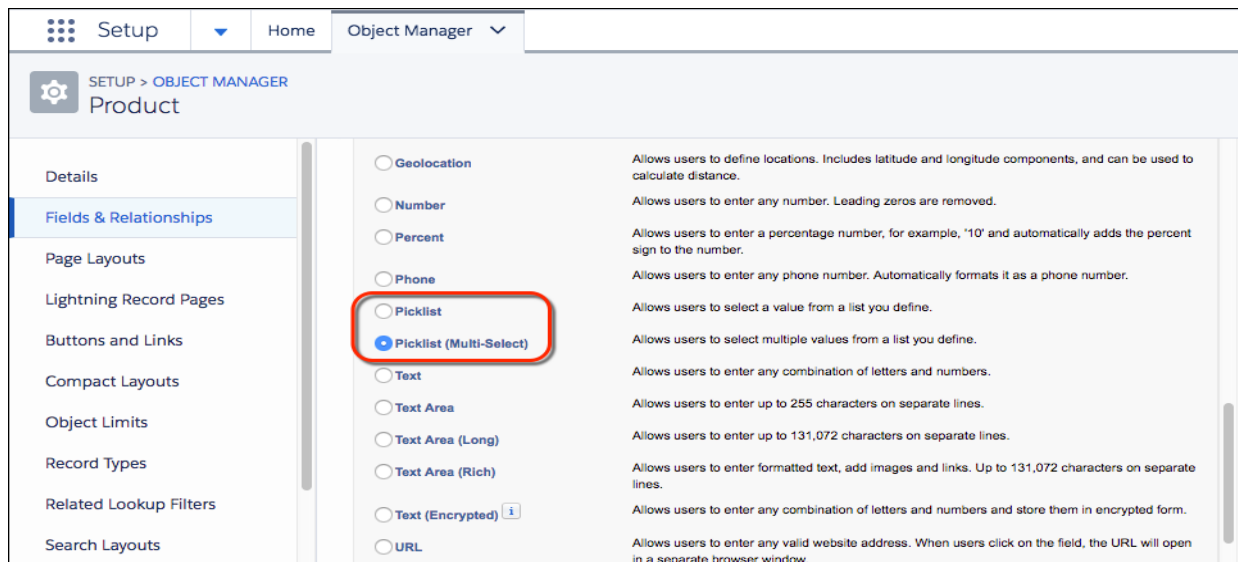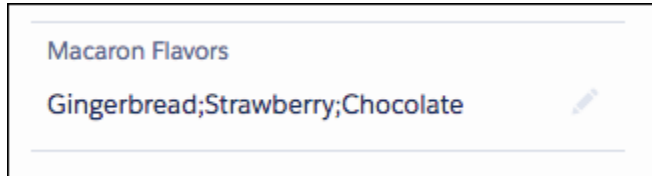When you create a custom picklist, notice the Picklist (Multi-Select) option, too.

Fig 1.1.3: custom multi select picklists

Pick this option if you want your users to select more than one value from the picklist. When a user picks more than one value, the selected values show in the field, separated by a semicolon.

Macaron Flavors

Gingerbread;Strawberry;Chocolate

Do they have to select more than one value? No. They can select only one. Now, you're probably thinking "Then, why don't I always use a multi-select picklist?" And, that's in case you want to restrict users to only one value. So, just remember:

● Picklist: Only one value at a time. Sometimes that's a good thing.

● Multi-Select Picklist: One or more values at a time.

Also, consider the following:

● Multi-select picklists have a lower limit on total values. See Picklist Limitations for more information.

● You can convert a custom picklist to a multi-select picklist to support multiple values in the field, later. However, when you convert a multi-select picklist to a picklist field that doesn't support multi-select, Salesforce clears the values for that field on existing records. The new field only allows one value.

● Reports referencing multi-select picklists should use contains or includes (not equals) to collect all results that contain more than one value.

● In report results, or dashboards, multi-select picklist selections are grouped independently. For example: One record has a, b, and c values. Another record has b and c values. And another record has only c selected. You'll get three different groupings: one for a;b;c, one for b;c and another for c.

● Only specific functions can reference multi-select picklists in formulas. See Tips for Working with Picklist and Multi-Select Picklist Formula Fields for more information.

1.1.4   RESTRICTED PICKLISTS

Restricted picklists keep users from adding new values (either through the API or other apps). This restriction is useful for keeping your data consistent. Imagine someone working in an app that loads data into your picklist and entering a typo into the list (for example, Vamilla).

If you don't restrict the values on a picklist, you can get records with values like "Vamilla" instead of "Vanilla" or added values you just don't want to see. With a restricted picklist, your picklist data stays clean.

Admins with the permission to edit the field can continue to add and edit values.

You set a restricted picklist when you select the Restrict picklist to the values defined in the value set option when you create a custom picklist. When you set a picklist to be unrestricted, users can't enter new values through the user interface, but they can add new values via the API, automation, or other apps.

To change this setting on an existing picklist:

1. Go to the picklist detail page and select Edit.

2. Select Restrict picklist to the values defined in the value set.

Fig 1.1.4: Restricted picklists

3. Click Save.

1.1.5 DEPENDENT PICKLISTS

Guide users, save UI space, and further improve data integrity with a dependent picklist. A dependent picklist filters values for one picklist based on a selection from another picklist or a checkbox (the controlling value) on the same record.

Say your bakery has a hundred different kinds of cookies, and you want to guide customers with gluten or nut allergies to cookies that don't have gluten or nuts. Create a controlling picklist for preferences to select "all" , "gluten-free" or "nut-free". Then, set the cookie flavor picklist as a dependent picklist of the preference picklist. When someone selects "gluten-free" the cookie flavor picklist shows only the gluten-free flavors.

Fig 1.1.5: dependent picklists

We cover how to set a dependent picklist in the next unit.

1.1.6 COMPARE PICKLIST FIELDS

Consider printing this, laminating it, hanging it on your wall.

	Standard Picklist	Custom Picklist	Custom Multi-Select Picklist
Add/Remove from Page Layouts	✔	✔	✔
Delete from Your Org		✔	✔
Set a Default Value	✔	✔	✔
Use a Formula for a Default Value		✔	✔
Can Select Multiple Values			✔
Can Add Values via Apps or API	✔	✔	✔
Can Be Restricted		✔	✔
Can Be a Dependent Picklist		✔	✔

Fig 1.1.6: compare picklists fields

That covers the picklist field types and properties. In the next unit, you focus on the things you can do with the picklist's values.

1.2   GOOD VALUE MANAGEMENT MATTERS
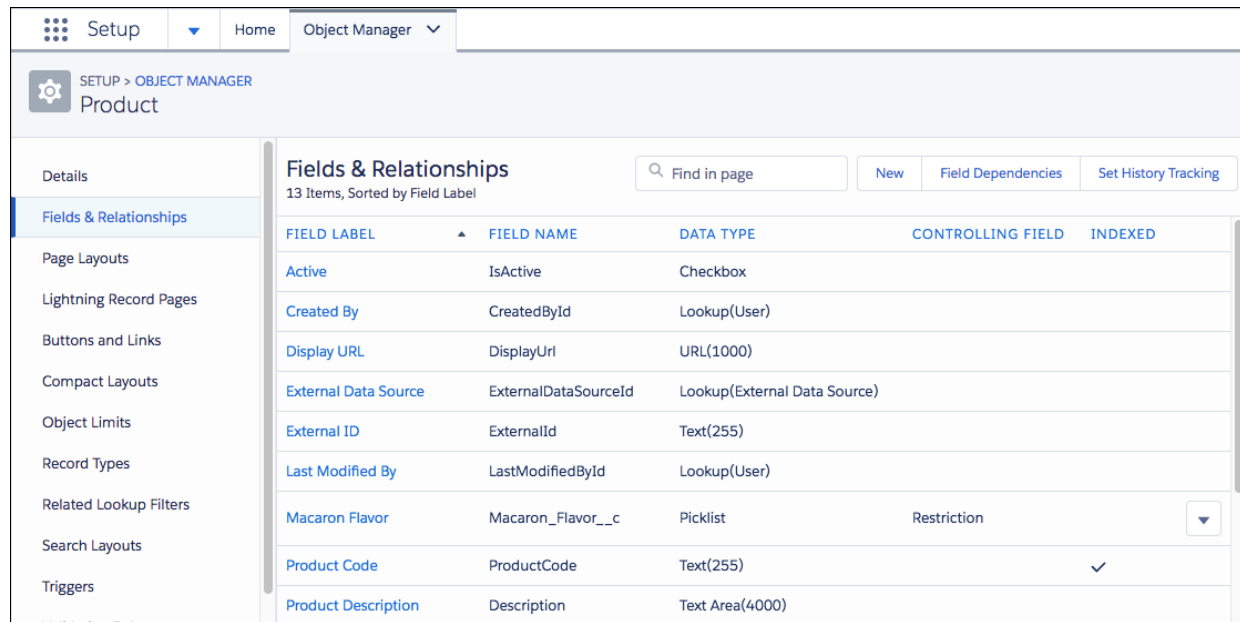
Are you still thinking about cookies from that last challenge? There are so many flavors of cookies in the world. If you're running a cookie company, you want to standardize your flavor names. Are your cinnamon cookies called "snickerdoodles"? Once you pick the name, you want to make sure your orders, and other records, always use the same name.

We show you how to get smart about how you set the values for picklists. Good picklist value management saves you time and helps keep the data in your org consistent.

1.2.1 WHERE YOU SET PICKLIST VALUES

Picklists are fields associated with individual objects. You set and manage picklists in the same

place you add or manage other fields: an object's Fields & Relationships page. When you created your picklist in the last unit, you set its initial values. Let's go back and look at a Fields & Relationships page.

Fig 1.2.1: set picklists values

What does "Indexed" mean? The page of Fields & Relationships identifies some fields, including some picklists, as indexed and you're probably wondering what that means. An indexed field is stored in the database in a way that supports quick retrieval. This optimizes report generation, list views, and other requests…sometimes. What makes a good index candidate is pretty advanced. Salesforce automatically analyzes performance and periodically assigns fields to be indexed. You don't have to think about this while you're creating picklists, but it can be important later if you're trying to optimize report or org performance.

1.2.2 MANAGE PICKLISTS VALUES

Time to start tinkering with the values.

1. In Setup, click the Object Manager tab, and then select the object associated with your picklist field.

2. Click Fields & Relationships.

3. Click the picklist's Field Label to see the field's detail page. You see your values in the Values related list

Fig 1.2.2: manage picklists values

You have a few options on this page:

- New: Create a new value.

- Reorder: Rearrange the existing values.

- Replace: Replace an existing value. You can replace an existing value with a new value, one of the other values, or a blank value. If you replace an existing value with a blank

value, existing records will not display the value anymore.

- Printable View: See all of your values at once. This is a helpful view while you set up a dependent picklist.

- Chart Colors: Customize the appearance of values on charts and reports.

1.2.3 ACTIVE, INACTIVE, DELETED & REPLACED VALUES

In the Values related list on the detail page, you can edit, delete, or deactivate individual values. You can probably guess the difference between an active value and an inactive one. Active values appear as an option in a picklist. Inactive values don't, but they're not entirely removed from your org.

When is this helpful? Think about your delicious pumpkin cookies. They aren't popular in summer, so you set that value to inactive all summer. In the fall, customers want pumpkin-flavored everything, so you start making pumpkin cookies and set the value to active, again.

But sometimes you really no longer need a value. You tried selling spinach cookies. Surprisingly, these were not a hit with your customers, so you delete that value.

Some important things to know about inactive values:

- Existing records containing a value when you set it to Inactive continue to contain the value.

- You can reactivate inactive values. This makes it a good alternative to deleting a value entirely.

- There is a limit on total combined active and inactive values. See Picklist Limitations. If you hit these limits and need more, you need to delete some values.

Important things to know about deleting/replacing values:

- Decide whether to replace the value or leave it blank. If you replace it with a blank value,

existing records will not display the value anymore. To keep the value on existing records, use Deactivate, instead of Del.

- Deleting a value in a picklist goes to the background jobs queue. When the job completes, your picklist is updated and you're notified by email.

- If you replace a parent value in a controlling picklist, the picklist dependency on that value is lost. After replacing the parent value, re-create the dependency using the new parent value.

- To replace a value, create the new value first. Then click Replace to start the process.

1.2.4 EDIT PICKLISTS VALUES

Let's look at the Values related list.

Fig 1.2.4: edit picklists values

On the field's detail page, click Edit to see more options for a single value.

And you can make any of the following changes:

- Change the Label. This is what appears in the UI.

- Change the API Name. This identifies the value for use in formulas and programming references. Typically, once set, this value shouldn't change. Otherwise, references to the value can break.

- Set the value as the default for the picklist.

- Change the chart color. This setting determines how this value appears in reports and dashboards. If not selected, the color is assigned dynamically.

1.2.5 WHY A PICKLIST VALUES API NAME IS IMPORTANT

It's easy to overlook the API name because it's auto-populated when you create the field. But this value is incredibly powerful. The API name is a unique identifier for a value, even when the label changes.

Since the Spring '17 release, picklist values are assigned an API name, which is a reference to the value, as well as a label, which is what shows in the UI. The API name allows formulas and custom apps to refer to a picklist value, even if the field name changes.

Imagine writing a formula, or customizing an app that refers to a picklist label value (as admins and devs had to do before Spring '17). Then the picklist value changes, and now the formula or reference to that value is no longer valid. Change happens. But, references to the API name continue to be valid, no matter the label value. And you can prevent the API name from changing to ensure references to the field's value won't become invalid, later.

1.2.6 CONTROLLING FIELDS, DEPARTMENT PICKLIST VALUES NARROWING VALUES

As we discussed in the previous unit, dependent picklist fields narrow the available values based on a selection in a controlling field. For example, the user selects "nut free" in a controlling field, and only cookie flavors that don't have nuts show in the dependent picklist field.

The controlling field doesn't have to be a picklist. It can also be a checkbox.

Fig 1.2.6: controlling fields for picklists values

To set a dependent picklist field:

1. From the management settings for the object you want to add a field to, click Fields & Relationships.

2. Click Field Dependencies.

3. Click New.

4. Choose a controlling field and dependent field.

5. Click Continue.

6. Use the field dependency matrix to specify which dependent picklist values are available when a user selects each controlling field value.

7. Optionally, click Preview to test your selections.

8. Click Save.

Some things to consider:

● Custom picklist fields can be either controlling or dependent fields.

● Standard picklist fields can be controlling fields, but not dependent fields.

● Multi-select picklist fields can be dependent, but not controlling fields.

● You can set default values for controlling fields but not for dependent picklists.

● If your org uses record types, choose a record type to test how it affects your controlling

and dependent picklist values. The record type and the controlling field together determine what values are available in the dependent picklist. For example, a dependent value is only available if it's available in the selected record type and the selected controlling value.

1.2.7 USE FORMULAS FOR DEFAULT PICKLIST VALUES

Now that you've got the basics, let's assign a dynamic default value. This means, based on certain conditions and values from other fields, the picklist's default value changes. Setting the right default can speed data entry.

For example, you can change the default value for a field based on the profile of the person viewing the field. Or if a customer's total cookie purchases are above a certain number, their frequent customer status changes.

1. In Setup, click the Object Manager tab, and then select the object associated with your picklist field.

2. Click Fields & Relationships.

3. Click Edit next to the picklist field.

4. Add your formula under General Options

Fig 1.2.7:formulas for default picklist values

5. Click Save.

It's super helpful to click Show Formula Editor so you have more space.

More importantly, the Formula Editor lets you check your syntax and gives you picklists (Yay picklists!) to suggest fields, operators, and functions for your formula.

1.2.8 CHANGE THE FIELD TYPE TO ALLOW/PREVENT MULTI-SELECTION

With all the options for picklist fields, rest assured you can change the field type when necessary. For example, if you have a custom picklist field and decide you want to make it a multi-select picklist, you can do that.

1. In Setup, click the Object Manager tab, and then select the object associated with your picklist field.

2. Click Fields & Relationships.

3. Click Edit next to the picklist field.

4. Select Change Field Type.

Fig 1.2.8:change field type to prevent multiselection

And vice-versa. You can convert a multi-select picklist to a custom picklist that doesn't allow multi-selection by changing the field type.

You can see that you have a lot of flexibility managing picklist values, and even the type of picklist to use. You can start with one type of picklist and switch to another, or change the behavior of the values in a picklist. It helps that you don't have to have it all figured out in advance. Change the picklist properties to meet your needs. In the next unit, you learn to share picklist values with more than one picklist.

1.3   SHARING MAKES FOR EASIER CARING

Global value sets let you share the same picklist values with more than one picklist field. Imagine your bakery has several places where it needs to list ingredients. Assign the same set of ingredient values to more than one picklist field. Pick a single ingredient in one picklist field, and several ingredients in a custom multi-select field from the same value set.

Fig 1.3:sharing makes for easier sharing

Consistency of values across more than one picklist makes it easier to enter the right values, and your data is more reliable. As you change the values in a global value set, the revised values show up in all the picklists using it.

1.3.1 CREATE A GLOBAL VALUE SET

Global value sets are always restricted. You can't convert them to unrestricted. This protects your values, because changing global value set values modifies the values for all the fields that reference the global value set.

While you can edit them, later, be mindful to create values that make sense across multiple fields.

1. From Setup, enter Picklist in the Quick Find box, then select Picklist Value Sets.

2. Next to Global Value Sets, click New.

Fig 1.3.1:create a global value set

3. Enter a label for the global value set. This name identifies the set in Setup, and appears as Values option when users create a picklist field.

4. To tell users what these values are for, enter a specific description of the global value set. This text appears on the Picklist Value Sets list page in Setup.

5. Enter the values, one per line.

6. Optionally, choose to sort the values alphabetically or to use the first value in the list as the default value, or both. If you select both options, Salesforce alphabetizes the entries and then sets the first alphabetized value as the default.

7. Click Save. To move values or re-alphabetize them, use Reorder.

1.3.2 USE THE GLOBAL VALUE SET IN A PICKLIST FIELD

Let's go back and take a look at the page where you set a custom picklist's properties.

1. In Setup, click the Object Manager tab, and then select the object to contain the picklist field.

2. Click Fields & Relationships.

3. Click New. Select Picklist, and then click Next.

4. Enter a Field Label.

5. Keep the default Values option (Use a global value set) and then choose the global picklist you want to use from the picklist.

6. Select other field settings as needed and click Next.

7. Set field-level security for the picklist field, and then click Next.

8. Choose the page layouts on which to include the picklist field, and then click Save.

1.3.3 MANAGE VALUE FOR GLOBAL VALUE SETS

As with other picklist values, you can reorder, replace, and change the default value of a global value set. You can also edit, delete, and deactivate individual values. Keep in mind, the changes apply to all picklist fields that use the global value set.

1. From Setup, enter Picklist in the Quick Find box, then select Picklist Value Sets.

2. Click the Label of the global value set to see its details.

Notice it looks and behaves just like a picklist field detail page. On this detail page, you can:

● Click Edit at the top to change the Label, API Name, or Description of the set.

● In the Values related list, you can change individual values and their properties. For example, click Edit next to a value to set it as the Default for the set.

Fig 1.3.3: manage values for global value sets

Some things to consider about editing global value sets:

- To replace a value, create the new value first. Then click Replace to start the process.

- When replacing a value, the Replace all blank values option assigns the new value to all picklist fields that are currently blank.

- Deleting a value in a global value set goes to the background jobs queue. When the job completes, your picklist is updated and you're notified by email.

1.3.4 PROMOTING EXISTING FIELD VALUES FOR A GLOBAL VALUE SET

You don't always know which picklist values make a good global value set before you've started using a picklist field. If you find that a particular set of values for one field makes a good set for another field, you can promote the existing value set to a global value set. Then, use it when you create a new custom picklist field.

1. Go to the Fields & Relationships section of the object that contains the picklist you want to convert.

2. Click the Field Label for the picklist.

3. Click Edit.

4. Click Promote to Global Value Set.

Fig1.3.4:promoting existing field values for global value set

5. Enter a label for the global value set.

6. Accept the Field Name or edit it.

7. Optionally, enter a description to identify it when using the values for other custom picklists.

8. Click Promote to Global Value Set, again.

You see the value set in the Values section.

Global value sets offer efficiency and consistency across multiple picklists. But remember, global value sets are always restricted. Independent custom field values are more flexible, but higher maintenance.

We believe you've just about earned your cookie.

You certainly know enough to pick the right picklist, and how to change a picklist as your needs change. Picklists are great for directing data entry and managing values for data consistency.

CHAPTER 2: LITERATURE REVIEW

Salesforce is a global leader and expert in customer relationship management solutions that connect businesses and customers. Its cloud services, such as sales, service, and community, can be customized to any business model. And their true worth is derived from the processes, workflows, rules, reports, and data for extraction. Salesforce is one of the most comprehensive and complete CRM platforms available in the market today. All the company's sales and marketing applications are included in the platform, including the Sales and Marketing Clouds, Service Cloud, Analytics Cloud, App Cloud, and IoT (Internet of Things) service. Sales force is mobile, and its Complete Customer Management Solution is among the best in the industry. Next, we come to Einstein's Automate. It is a product portfolio that includes integration, workflow automation, digital interactions, and AI capabilities that are built within the Salesforce platform**.** Picklist helps with data entry and standardizing input values. Picklist guides the user to values they need and makes data entry quicker. The picklist is not ideal for long entries or values that are not unique.

2.1 OBJECTIVES

1. Decide when to add a picklist field.
2. Decide which type of picklist you need.
3. Manage values for picklists.
4. Use formulas to define picklist values dynamically.
5. Create global value sets.
6. Manage global value sets.

2.2 SCOPE

1. The maximum number of characters you can have in a picklist depends on the type of picklist.

2. Each picklist value includes a line break and a return character that aren't visible.

3. This limit applies to single-select and multi-select picklists.

For custom picklist fields that use a global picklist value set, you can change from a single-select to multi-select picklist and vice versa. But you can't change the picklist to a different field type such as checkbox, currency, or text.

4. You can't undo a custom picklist field's association with a global value set. To use a different global value set or different individual values in a picklist, delete the custom picklist field and replace it with a new picklist.

CHAPTER 3: METHODOLOGY

3.1 PROPOSED SYSTEM

To solve the process automation in sales force RPA (Robotic Process Automation) is a technology that can be used with Sales force to increase productivity and reduce human error in connection with repetitive tasks such as data migration. The Test Automation release management tool for Salesforce integrates your existing software tools with test

scripts and test case generation. This construction breaks down silos between the testing and development teams to promote collaboration on test scripts. Your company can also manage test cases to lower errors and cycle times. This capability allows you to transfer functionalities in any Sales force org quickly and safely. Anti Rabbit supports Deployment Automation for these deployment types: Deployments with Anti Rabbit builds, Sandbox-to-sandbox deployments, Deployments using the Version Control Revision Number. Achieve higher release velocity and improve time to market with Anti Rabbit.

3.2 BENEFITS OF PROPOSED SYSTEM

1. Allows users to confidently report against a field
2. Restricts the values allowed in the field
3. Standardizes responses to maintain accurate data
4. While picklist fields are created on individual objects, global picklists are created from the Picklist Value Sets option in Setup (Setup > Search in Quick Find Box "Picklist" > Select "Picklist Value Sets").
5. Picklists are fields and global picklists are value sets.

3.3 WORKING OF THE SYSTEM

- You can use special picklist fields in your formulas, such as is escalated for cases and Is won for opportunities.
- Picklist fields can only be used in these functions:
  - ISPICKVAL—Compares the value of a picklist to a single value.
  - CASE—Compares the value of a picklist to multiple values.

- o TEXT—Returns a picklist value's API Name so that you can work with a reference to the value (even if the displayed value changes) in functions that support text values, such as CONTAINS. (Available in only flow formula resources, formula fields, validation rules, and workflow field updates.)

3.4 SYSTEM FEASIBILITY

ECONOMICAL:

In economic feasibility, cost benefit analysis is done in which expected costs and benefits are evaluated. Economic analysis is used for evaluating the effectiveness of the proposed system. As the name suggests, it is an analysis of the costs to be incurred in the system and benefits derivable out of the system.

- It is evaluating the effectiveness of the candidate system by using a cost/benefit analysis method.
- It demonstrates the net benefit from the candidate system in terms of benefits and costs to the organization.
- The main aim of Economic Feasibility Analysis (EFS) is to estimate the economic requirements of the candidate system before investment funds are committed to proposal.
- It prefers the alternative which will maximize the net worth of the organization by earliest and highest return of funds along with lowest level of risk involved in developing the candidate system.

TECHNICAL:

The objective of a feasibility study is to find out if an information system project can be done and to suggest possible alternative solutions. A large part of determining resources has to do with assessing technical feasibility. It considers the technical requirements of the proposed project.

- It investigates the technical feasibility of each implementation alternative.
- It analyzes and determines whether the solution can be supported by existing technology or not.
- The analyst determines whether current technical resources be upgraded or added it that fulfill the new requirements.

- It ensures that the candidate system provides appropriate responses to what extent it can support the technical enhancement.

BEHAVIORAL:

There is a simple form to fill and service requires no ambiguous entries, all the behavioral entries are simple and GUI based. The application should be used by Admin to feed the application with reliable and error free data to generate correct results.

- It evaluates and estimates the user attitude or behavior towards the development of a new system.
- It helps in determining if the system requires special effort to educate, retrain, transfer, and changes in employee's job status in new ways of conducting business.

OPERATIONAL:

- It determines whether the system is operating effectively once it is developed and implemented.
- It ensures that the management should support the proposed system and its working feasible in the current organizational environment.
- It analyzes whether the users will be affected and they accept the modified or new business methods that affect the possible system benefits.
- It also ensures that the computer resources and network architecture of candidate system are workable.

SCHEDULE:

- It ensures that the project should be completed within a given time constraint or schedule.
- It also verifies and validates whether the deadlines of projects are reasonable or not.

3.5 APPLICATION DESIGN

Architectural Design is a concept that focuses on components or elements of a structure. An architect is generally the one in charge of the architectural design. They work with space and elements to create a coherent and functional structure. An architecture model encompassing data

architecture and program structure is created during architectural design. In addition, component properties and relationships (interactions) are described.
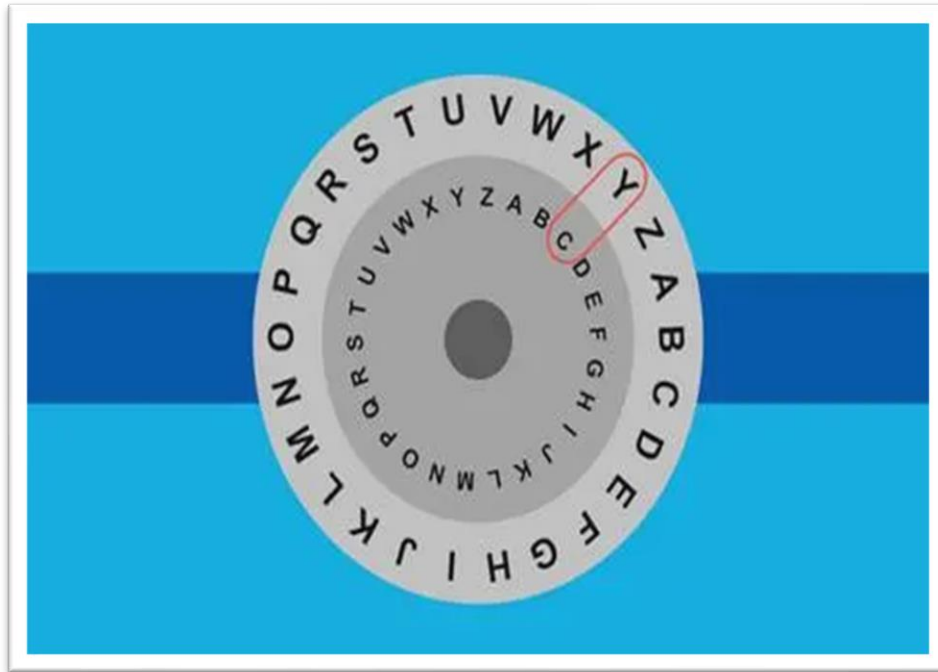
Fig 3.6.1.1: Architectural Design

3.6.1 GET STARTED WITH SHIELD PLATFORM ENCRYPTION

A. Encryption:

At its most basic level, encryption scrambles information so that only those people with the right decoder key can unscramble it. These scrambling mechanisms vary in complexity. Some use simple substitution, like exchanging a number for a letter. For example, if we used this method with the encryption key in the graphic below, "Trailhead" would look like "Xvemplieh". Other systems use complex algorithms that use multiple keys to scramble and unscramble data. In this way, encryption helps prevent unauthorized people from accessing your data.

3.6.2 ENABLE SHIELD PLATFORM ENCRYPTION

Salesforce offers you two ways to encrypt data. Classic encryption is included in the base price of your Salesforce license. With classic encryption, you can protect a special type of custom text field that you create for data you want to encrypt. The custom field is protected with industry-standard 128-bit Advanced Encryption Standard (AES) keys.

Shield Platform Encryption is available for free in Developer Edition orgs. All other editions require you to purchase a license. With Shield Platform Encryption, you can encrypt all kinds of confidential and sensitive data at rest on the Salesforce Platform. "At rest" means any data that's inactive or stored in files, spreadsheets, standard and custom fields, and even databases and data warehouses. The data is encrypted with a stronger 256-bit AES key, and subscribers can manage access to their data with a wider range of keys and permissions. Shield Platform Encryption even allows you to search for encrypted data in databases.

Shield Platform Encryption gives customers an encryption advantage because it allows you to prove compliance with regulatory and industry requirements and show that you meet contractual obligations for securing private data in the cloud.

Turning on Shield Platform Encryption is as easy as 1-2-3.

1. Provision your license. Contact Salesforce to get one. Shield Platform Encryption is automatically available in Developer Edition orgs created on or after the Summer of 2015.

2. Assign permissions. To enable Shield Platform Encryption, you need the Customize Application and Manage Encryption Keys permissions. After you enable encryption, you can give others permission to complete administration tasks on the Encryption Policy page. However, you likely don't want everyone managing encryption keys. Assign permissions with these scenarios in mind.

3.

	Manage Encryption Keys	Customize Application	View Setup and Configuration	Manage Certificates	Modify All Data
View Platform Encryption Setup pages		✔	✔		
Edit Platform Encryption Setup pages, excluding Key Management and Advanced Settings		✔			
Generate, destroy, export, and import tenant secrets	✔				
Query TenantSecret object via the API	✔				
Edit, upload, and download HSM-protected certificates with the Shield Platform Encryption Bring Your Own Key service	✔			✔	
Edit options on the Advanced Settings page					✔

Fig 3.6.3.1: Enable Shield platform encryption

For example, as an admin, assign yourself the View Setup and Configuration permission. This lets you enable encryption features for fields, files, attachments, and apps.

4. Enable Shield Platform Encryption for your org. When you have your license and permissions set up, you can enable Shield Platform Encryption on your orgs. You then create org-specific tenant secrets and customize your encryption settings for each org.

3.6.3 ASSIGN PERMISSIONS AND CREATE A TENANT SECRET ASSIGN PERMISSIONS

Because Doc Mosely's going to be busy with patients, he asked you to handle the Shield Platform Encryption setup. Doc Mosey goes through the steps to give you the "Customize Application" and "Manage Encryption Keys" permissions.

1. From Setup, enter Permission Sets in the Quick Find box, then select **Permission Sets**.

2. Click **New**.

3. Create a label for the set of permissions, for example, Key Manager. The API name populates with a variation of your chosen label.

4. Click **Save**.

5. In the System section of the Key Manager page, select **System Permissions**.

6. Click **Edit**, and enable the Customize Application and Manage Encryption Keys permissions.

7. Click **Save**.

8. From Setup, enter Users in the Quick Find box, then select **Users**.

9. Select the name you want in the User list (in this case, that's yours

10.Scroll down to Permission Set Assignments, and select **Edit Assignments**.

11.Select **Key Manager**, then add it to the Enabled Permission Sets list.

12.Click **Save**.

3.6.4 GENERATE A TENANT SECRET

As we learned in the last unit, tenant secrets are used to derive your encryption keys. They work with the Salesforce-generated master secret, but your tenant secret is specific to your org. In this way, the data in each of your orgs is encrypted with keys unique to that org.

Fig 3.6.5.1: Generate a tenant secret

1. From Setup, in the Quick Find box, enter Platform Encryption, and then select **Key Management**.
2. Select **Data in Salesforce** from the Choose Tenant Secret Type list. Tenant secret types allow you to specify which kind of data you want to encrypt with a tenant secret. We'll start by encrypting data in the core Salesforce database for now.
3. Select **Generate Tenant Secret**

It's as easy as that. Now you have a tenant secret that the Salesforce key management service can use to create the keys. Those keys encrypt and decrypt the clinic's data.

3.6.5 KEY HYGIENE: MANAGEMENT BEST PRACTICES

Doc Mosey is fastidiously clean by trade and habit, and he encourages you to regularly update your org's tenant secret. Just like updating a password, frequently updating tenant secrets reduces the likelihood that malicious third parties can brute-force their way into your org.

Fig 3.6.6.1: Key hygiene management best practice

CHAPTER 4:DISCUSSIONS

Sales force Automation Visual Workflows or just Flows permit us to automatism way more advanced business processes and most significantly modify us to automatism processes wherever we want to urge information from the user then proceed based on the inputs provided. We are able to additionally delete records through Flows. In contrast to a process, Flows don't initiate on their own based on changes to a Record. They have to initiate through different suggestions like calling them from a Salesforce Process Builder, through a Visual force page or calling them through APEX. The activities allowed through the Approval Process are Field Update, Email Alert, Create Task and Outbound Message. We can empower the Approval Process through Email Response, through Chatter Feed or through consistent endorsement. Endorsement Process starts when a user submits a record for endorsement when called from Salesforce Process Builder or a Flow or through APEX. Each device has its own preferences and a couple of restrictions to it too. It is critical to comprehend the capacity of every one of these devices to choose which instruments suit our particular utilize case. At the point when utilized as a part of mixes, we can robotize business processes.

CHAPTER 5:CONCLUSION

Salesforce.com is an emerging cloud technology. This will be very helpful to the business organizations, Government agencies, healthcare industries and much more. The features of salesforce.com are a complete package to solve the Problems which are in traditional software development techniques.

The proper utilization of salesforce.com will help to grow your business rapidly. This will save the annual cost of organizations. And one important benefit is that the Development process will be faster because of less coding in the salesforce.com. It provides drag and drop technique for even logical queries.

This paper gives Salesforce Picklists administration are useful to clearly understand the impacts in a Salesforce ecosystem. The tools, services, and capabilities offered by a professional Salesforce Development Company can help you effortlessly manage changes to Salesforce workflows, formula fields, picklists, and custom objects.

This, in turn, will help you gain visibility into what will break and where. It will help you understand and explore the testing and development process for ensuring that you are thoroughly focused on testing items that are specifically associated with the project at hand.

You can make a custom single-select picklist field into a restricted picklist only if the picklist has fewer than 1,000 values (or entries). You can make a custom multi-select picklist field into a restricted picklist only if the picklist has fewer than 500 values (or entries). A restricted picklist's values are limited to only those values defined by a Salesforce admin, which prevents users from loading redundant or erroneous values through the API.Global picklist value sets are always restricted picklists, which preserves data integrity. Global value sets are shared across objects. Reuse the value set for any custom picklist field.

For custom picklist fields that use a global picklist value set, you can change from a single-select to multi-select picklist and vice versa. But you can't change the picklist to a different field type such as checkbox, currency, or text.You can't undo a custom picklist field's association with a global value set. To use a different global value set or different individual values in a picklist, delete the custom picklist field and replace it with a new picklist.

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7. CERTIFICATE OF INTERNSHIP

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November 25, 2022

Karella Rupa Naga Prasanna Raji

Salesforce Developer Virtual Internship

During the 8 Weeks period of Virtual Internship **(July-September 2022)**, Karella Rupa Naga Prasanna Raji has completed the following Salesforce Trailhead modules

Salesforce Fundamentals
Organizational Setup
Relationship & Process Automation
Types Of Flows & Security
Apex, Testing & Debugging
VS Code Setup & CLI Setup
Lightning Web Components (LWC) & API

Super Badge - Apex Specialist
Super Badge - Process Automation Specialist

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