**Salesforce Admin**

TTop Companies that use Salesforce today

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| --- | --- |
| **Company Name** | **Industry** |
| Aricent Group | Telcom |
| Aricent Inc | Telcom |
| BlueScope Steel | Manufacturing |
| KONE | Manufacturing |
| Cisco Systems Inc | Computers and Electronics |
| Motorola Inc | Telcom |
| Yamaha Corporation | Wholesale and Distribution |
| Allianz AG | Financial Services |
| Spherion Corporation | Business Services |
| P&H Mining Equipment | Manufacturing |
| Thomson Reuters Corporation | Financial Services |
| VTB Capital plc | Financial Services |
| Swiss Re Corporation | Financial Services |
| BNP Paribas Limited | Banking |

CRM, collection of databases, SaaS, PaaS, Org that provides software services…software that unites customers and org…multi tenant operation

Sales cloud >> Payment system >> Delivery system

Mulesoft – Purpose : To integrate with other systems.

**Key points to remember:**

* Runs on cloud
* Can be accessed via a browser and a stable internet connection
* Multi-tenant environment

**Learning environment setup:**

**Step 1:** [**https://trailhead.salesforce.com**](https://trailhead.salesforce.com) **– Use this to create a sample product instance for training and learning purpose**

**Step 2: Create a playground org**

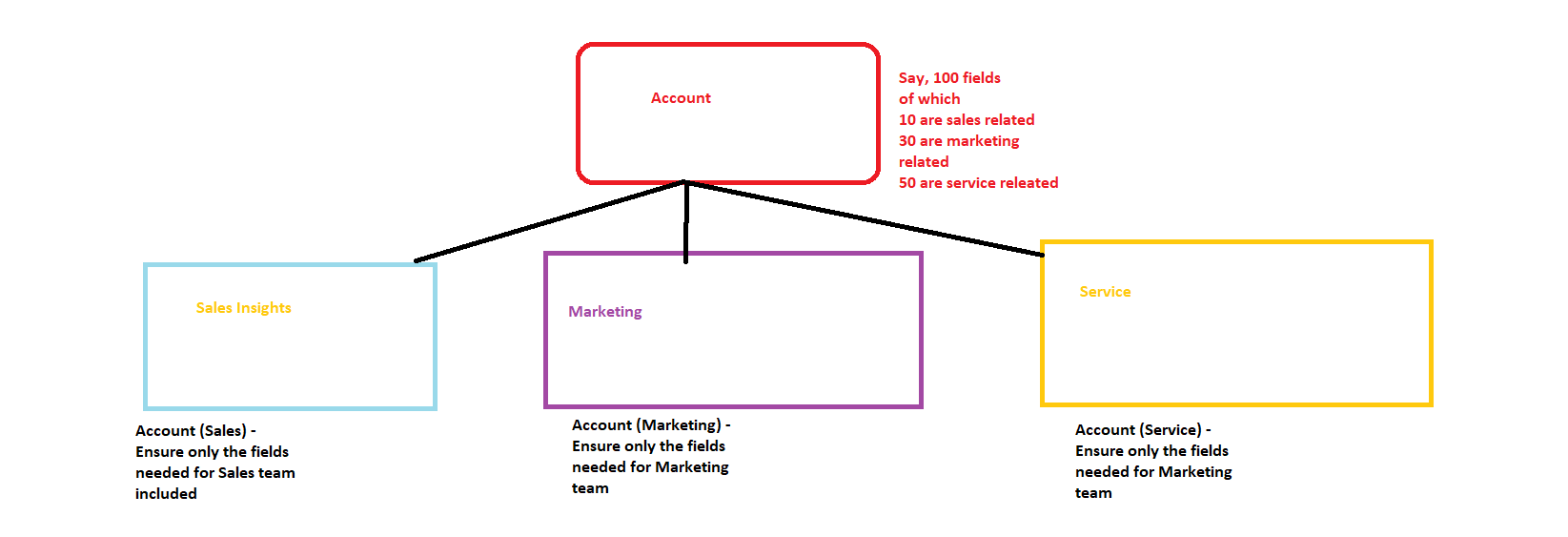
**Company setup:**

**Terminologies used in SF eco system:**

* **Standard**
  + **Anything that’s is available inbuilt or out of the box**
* **Custom**
  + **Anything that you create as a developer or admin**
* **Tabs**
  + **Nothing but navigation menu links**
* **Object**
  + **Nothing but table in the database**
* **Org**
  + **Refers to an environment or an instance of Salesforce product**
  + **You can have a specific purpose (development, testing, production, training, learning) associated to an org**
* **Sandbox**
  + **Nothing but a non-prod environment**
  + **Eg:** [**https://gibsonguitar2--spmdev.sandbox.my.salesforce.com/**](https://gibsonguitar2--spmdev.sandbox.my.salesforce.com/) **- Developer Org**
  + [**https://dealer--b2bpartial.sandbox.my.salesforce.com/**](https://dealer--b2bpartial.sandbox.my.salesforce.com/) **- SIT Org**
  + [**https://gibsonguitar2.my.salesforce.com/**](https://gibsonguitar2.my.salesforce.com/) **- Prod org**

**Features List in SF system:**

* **User Login**
  + **3 ways to login**
    - **Direct user name and password (login.salesforce.com)**
    - **Via trailhead – Launch option (Only used during training or learning purpose)**
    - **Single sign on by integrating Salesforce org with Company’s active directory (MZ Azure Directory, IBM Tivoli etc)**
* **Profile**
  + **A way to group users in the system**
  + **User – Profile mapping (1:1)**
  + **Can use profile to define user security / access in the org**
  + **WHAT USER CAN DO IN THE SYSTEM**
* **Permission Set**
  + **Helps users to have elevated access in the system**
  + **Part of security feature and works along with Profile**
* **Page Layout**
  + **Used to control fields to be shown on a page**
  + **One can use Std. page layout and edit to meet the needs**
  + **Or create a custom page layout to configure fields on the page**

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* **Dynamic Forms**
  + **Adv. Version of page layout**
  + **You can choose a page layout and upgrade to Dynamic forms**
  + **Helps to make ur page dynamically change based on user input**
* **Data Relationships**

**Objects & Purpose**

|  |  |  |
| --- | --- | --- |
| **Type** | **Name** | **Purpose** |
| **Standard** | **Account** | **Meant to store customer information** |
|  |  |  |

**Org Users**

|  |  |
| --- | --- |
| **CEO** | **Mithran** |
| **Sales Manager** | **Malcom** |

**Use case #1:**

**As an admin, how can I modify the std. marketing app so that it will have ‘Account’ tab included:**

**Solution:**

* **Use app manager from setup**

**Use case #2:**

**CEO of travel hut has identified a Sales Manager named ‘Malcom’. You have been tasked to onboard the Sales Manager**

**Solution:**

* **From setup use ‘Users’ option**
* **‘Users’ feature will help to create and manage org. users**
* **Create Sales profile and add user to it**

**Use case #3:**

**Malcom has raised a concern that his UI is not very friendly . Also, he is not seeing Sales app for him to manages customers, contacts etc**

**Solution:**

* **Enable access to Lightning UI to the Sales profile**

**Use case #: 4**

**CEO of travel hut would like to ensure ‘Malcom’ is able to manage hotel partner customers and customer point of contacts & reports alone when logged into the system**

**Solution:**

* **Use app manager and create a new custom app**

**Use case #: 5**

**Malcom has raised a concern that in his UI he is able to more apps besides “Sales Insights”.**

**How as a sys admin you will configure the app launcher UI for Malcom?**

**Solution:**

* **Login as Malcom and check on his App launcher apps**
  + **Pre-req: Enable Login as user policy from setup and Uncheck force relogin after login-As-user**
* **Use “Profile” to set app security for Malcom**

**Use case #: 6**

**CEO of Travel Hut would like to onboard a new Sales Director named ‘John Doe’ who will oversee Sales Operations. Sales Director must have access to Sales Insights, Sales and Marketing apps**

**Solution:**

* **Create a new user John Doe and assign with “**[Travel Hut : Custom: Sales Team](javascript:srcUp(%27%2F00e5j000000asI3%3Fisdtp%3Dp1%27);)”
* **Use “Permission Set” to give elevated or special access to John doe so that he can see marketing app in addition to Sales apps**

**Use case #: 7**

**CEO and Sales Director would like to ensure only relevant fields are displayed on account / customer page. So that, Sales team can enter only the information related to hotel partner and resorts**

**Solution:**

* **Use “Page Layouts” or “Dynamic Forms”**
* **Option 1 : Page Layout**
  + **Create a new Page Layout**
  + **Use Page layout assignment option**

**Use case #8:**

**Sales Team would like to store more information on the new hotel / account create page. The list of data points to be captured are given below**

* partner hotel image
* Location (Reuse BillingCountry)
* Customer Rating
* Total Rooms Available
* Hotel Lat
* Hotel Long
* Hotel Category ( 2 star, 3 star, 5 star, 7 star)
* Room Types (Suite, Doubel, Single, Family, Penthouse) – Cannot be a drop down
* Amenities (Parking, Gym, Swimming Pool, Resturantants, In-house dinning, Bar)

**Solution:**

* Create custom fields on Account object

**Use case #9:**

John Doe (Sales Director) would like to see additional information when hotel partner account is created in the system.

Ensure the below fields are available only for Sales Director and no Sales Team member

* Legal Review (Sent for review, In Progress, Approved)
* Legal Reviewed By (user that is assigned for legal review)
* Agreement Needed ? (If yes, then allow user to choose between the 2 agreements)
* Agreement
  + Exclusive Partnership Agreement
    - Start date , End date, Description
  + Marketing Collabration Agreement
    - Start date , End date, Description
* Eligible for Discounts & Promotions
  + Seasonal Promotions with 10% discount
  + Seasonal Promotions with 15% discount
  + New Customer Onboarding discount

Solution:

Option 1: ~~Roles . Roles can be used only to define data security~~

Option 2: Page Layout

* ~~Can we create a new page layout and assign to John Doe~~
* ~~Can we create a new page layout and assign to John Doe’s profile~~
* Can we use permission sets ?

**TIP : PAGE LAYOUT FIELDS SECURITY FLOW**

PAGE LOADS

🡪 SYSTEM CHECKS THE USER PROFILE 🡪 THOSE FIELDS THAT ARE MARKED AS VISIBLE OR READ ONLY WILL BE SHOWN ON THE PAGE

🡪 SYSTEM CHECKS THE USER PERMISSION SET 🡪 IF THERE IS ANY PERMISSION SET DEFINING FIELD READ ONLY OR EDIT ACCESS THEN THOSE FIELDS WILL BE SHOWN ON THE PAGE

**Use case #10:**

John Doe raises a concern that the system is showing lot of fields. For e.g agreement related fields should be shown only when agreement needed checkbox is selected.else it should be hidden from user view

**Solution:**

**Option 1:** ~~Page Layout . Cannot be done as dynamic fields setup not possible in page layout feature~~

**Option 2: Dynamic Forms**

* Another functionality in SF helps to configure UI fields
* Helps to configure fields that will show or hide based on visibility filters

**TIP : PAGE LAYOUT + DYNAMIC FORMS FIELDS SECURITY FLOW**

PAGE LOADS

🡪 SYSTEM CHECKS THE USER PROFILE 🡪 THOSE FIELDS THAT ARE MARKED AS VISIBLE OR READ ONLY WILL BE SHOWN ON THE PAGE

🡪 SYSTEM CHECKS THE USER PERMISSION SET 🡪 IF THERE IS ANY PERMISSION SET DEFINING FIELD READ ONLY OR EDIT ACCESS THEN THOSE FIELDS WILL BE SHOWN ON THE PAGE

🡪 IF DYNAMIC FORMS ENABLED

* SYSTEM CHECKS THE FIELD VISIBILTY 🡪 IF VISIBILTY CONDITION IS TRUR THEN FIELDS WILL BE SHOWN ON THE PAGE

**Open items:**

1. How do we import data?
2. How do I create my own fields to store information? – DONE
3. Can I associate same contact to multiple accounts? Ex: Same PRO can be part of more than one hotel.
4. Can I copy contact work phone to personal phone automatically?

**TODO**:

1. How do you assign a page layout at user level instead of profiles?
2. How do I customize links that are shown ‘All Items’ section inside App launcher