**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**

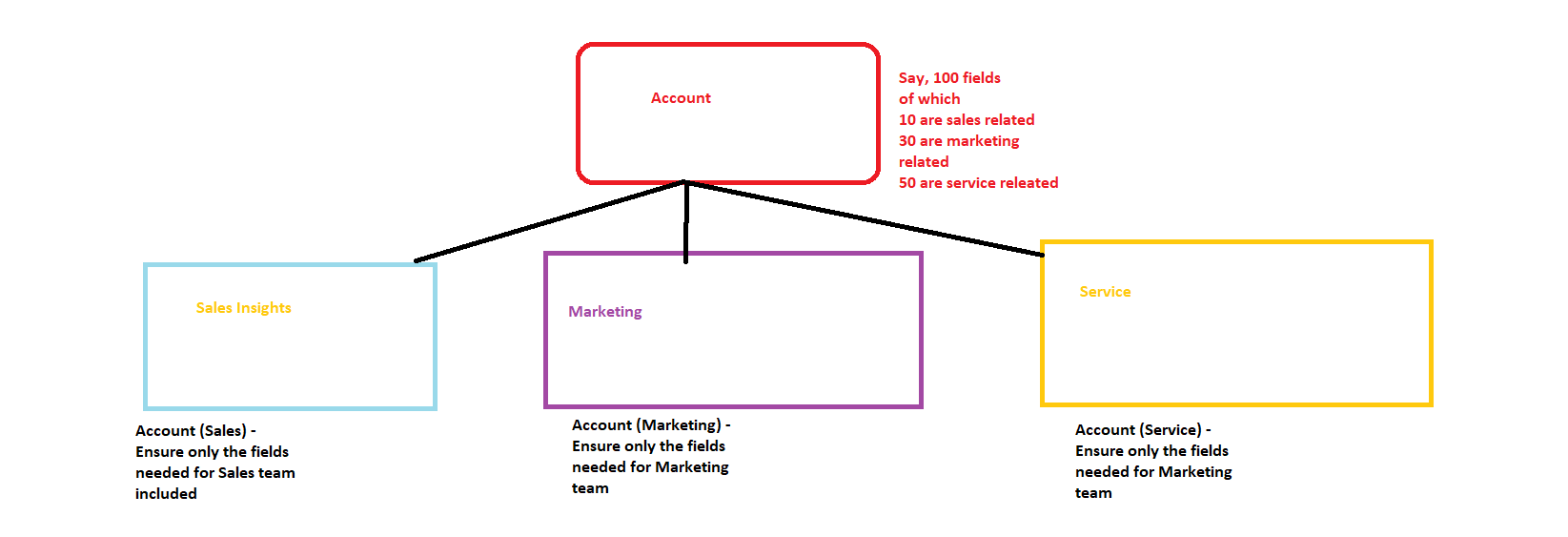
**Company setup:**

**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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**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
* Amentites (Parking, Gym, Swimming Pool, Resturantants, In-house dinning, Bar)

**Solution:**

* Create custom fields on Account object

**Open items:**

1. How do we import data?
2. How do I create my own fields to store information?

**TODO**:

1. How do you assign a page layout at user level instead of profiles?