Week 3 Notes

What is included in Salesforce service Cloud?

Service Cloud customer service software includes case management, customer access across all channels, integration with legacy data systems, prebuilt integration apps, support ticketing, knowledge base, routing and escalation, and queue management.

Organization

Profiles

Login hours

* + Login ip ranges

Object

* Deals with access to CRM objects (both standard and custom) and the actions we can perform on accessible records of those objects. We control this level through profiles and permission sets.

Record

* OWD (Organization Wide Default) Most restrictive
* Role Hierarchy
* Sharing Rules
* Manual Sharing

Nothing can be more restrictive than Organization-Wide Defaults (OWDs)

When object and record level security settings conflict, the most restrictive settings win.

Field

* Deals with the operations that users can perform on specific fields of a record of an object. Like with object permissions, we control FLS through profiles and permission sets. There are three possible levels of access to any field on a record - no access (the field is not visible, and the value is uneditable), read access, and read and edit access

Mass delete = UP TO 250 entries at a time. GITHUB notes

Lightening App Builder vs. Page Layouts:

Lighting App Builder is a beefed up version of Page Layouts.

Leads

Opportunities

Products

Pricebooks

Cases

Campaigns (optional)

CUSS- create , update a record, send an email, send outgoing message

Full copy sandbox has unlimited space and the partial copy is limited. Sandboxes, STUDY

Org Wide Defaults, Role Hierarchy,

Look up cross object field updates.

Look into workflow rules

Study Heroku and External emails

Learn more about the Data Loader.

Lightening Experience