

Day-12

- Permission set group bundles different permission sets together based on a persona.
- A permission set group includes all the permissions available in the permission sets.
- One permission set can be included in more than one permission set groups.
- A user can be assigned one or more permission set groups.
- Also, we can assign permission set and permission set groups together to users.

Steps to create permission set groups:

- Before creating permission set groups. We have to create 2 or more than and add them in one group and assign it to the users.
- 1st create 2 or more permission set before creating permission set group. For example, we are creating 2 permission set **Demo one PS**, **Demo two PS** and give them different access like for demo one Ps we give edit access and demo two PS give delete access of account object and add them in permission set group and assign to Test user.
- For create permission set, search for permission sets in Quick search. After click on new.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts and...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Connect...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that use...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that...	Service Cloud Voice User
<input type="checkbox"/>	Demo one PS	Salesforce	Salesforce
<input type="checkbox"/>	Demo two PS	Salesforce	Salesforce
<input type="checkbox"/>	Experiencing Profile Manager	Lets users create, read, edit, and delete locations, sublocations, queue...	Facility Manager
<input type="checkbox"/>	Facility Manager	Give your mobile workforce access to the Field Service mobile app. Set...	Field Service Mobile
<input type="checkbox"/>	FieldServiceMobileStandardPermSet	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seats
<input type="checkbox"/>	Merchandiser	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Agent		

- Now give the label as Demo one PS.
- select license as salesforce.
- click on save.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page selected. A new permission set is being created with the following details:

- Label:** Demo one PS
- API Name:** Demo_one_PS
- Description:** (Empty)
- Session Activation Required:** (unchecked)
- Select the type of users who will use this permission set:**
 - Choose -None- if you plan to assign this permission set to multiple users with different user and permission set licenses.
 - Choose a specific user license if you want users with only one license type to use this permission set.
 - Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.
- Not sure what a permission set license is? Learn more here.**
- License:** Salesforce

- Now permission set is created, and we can edit any access. Here we are edit objects settings and give only edit access to demo one PS and give access of industry field to this permission sets.

The screenshot shows the details of the 'Demo one PS' permission set. Key information includes:

- Permission Set:** Demo one PS
- API Name:** Demo_one_PS
- Namespace Prefix:** (empty)
- Created By:** Zahid Khan, 09/10/2023, 9:33 pm
- Apps:** (Section)
 - Assigned Apps:** Settings that specify which apps are visible in the app menu
 - Assigned Connected Apps:** Settings that specify which connected apps are visible in the app menu
 - Object Settings:** Permissions to access objects and fields, and settings such as tab availability (highlighted with a red box)
 - Apex Permissions:** Permissions to perform app-specific actions, such as "Manage Call Centers"
 - Apex Class Access:** Permissions to execute Apex classes
 - Visualforce Page Access:** Permissions to execute Visualforce pages
 - External Data Source Access:** Permissions to authenticate against external data sources

- After that we get all the objects of the org., we can select any object which is required. Here, we are selecting Account object.
- After that click on edit.

- now check the box of edit, read box auto enable.

- After that check the edit and read access of industry field in field permissions.

- After that click on save. Now demo one PS permission set is created.
- Same way creates demo two PS and give delete access. With delete access edit and read access enable automatically.

The screenshot shows the 'Permission Sets' page in the Salesforce Setup. The 'Permission Sets' tab is selected. Two new permission sets are listed:

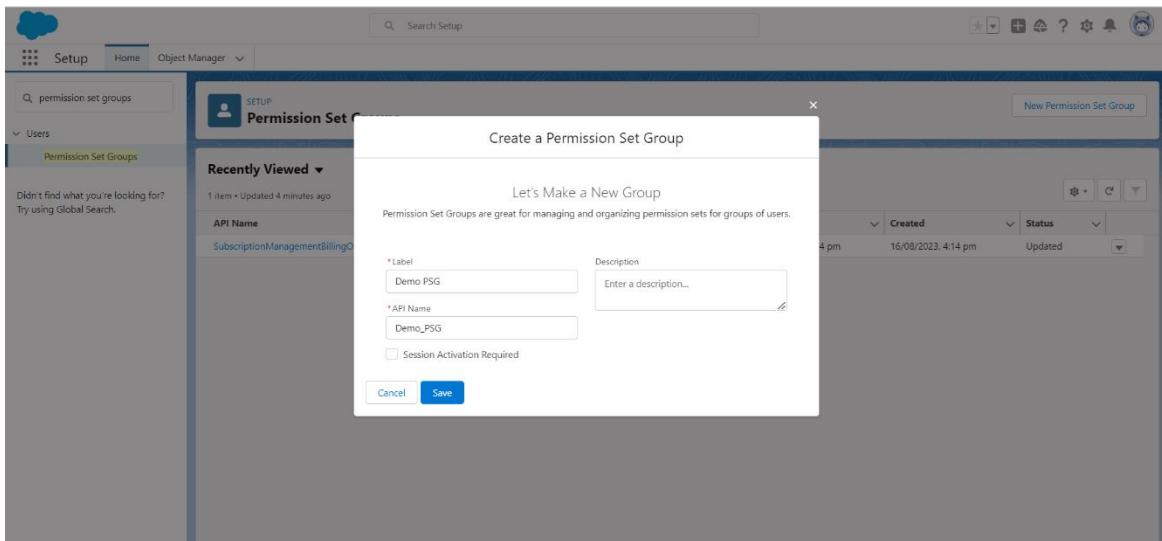
- Demo one PS**: Description: Allows access to the store. Lets users see products and categories, make purchases, and manage carts and orders. Includes all buyer capabilities, and allows access to manage carts and orders.
- Demo two PS**: Description: Denotes that the user is a Sales Cloud or Service Cloud user. Allows access to commerce admin features.

Both permission sets have the 'Delete' checkbox checked, which enables the 'Edit' and 'Read' checkboxes. The 'Edit' and 'Read' checkboxes are highlighted with red boxes.

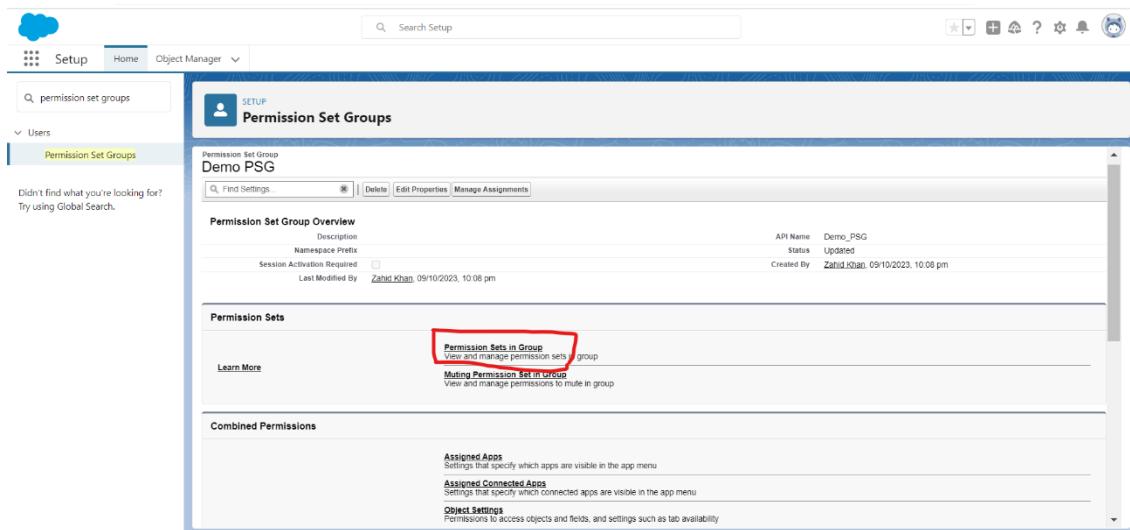
- After creating 2 permission sets. Search for permission set groups in quick search and click on it.
- After that click on new permission set group.

The screenshot shows the 'Permission Set Groups' page in the Salesforce Setup. The 'Permission Set Groups' tab is selected. A red box highlights the 'New Permission Set Group' button in the top right corner. The 'Users' section is also highlighted with a red box.

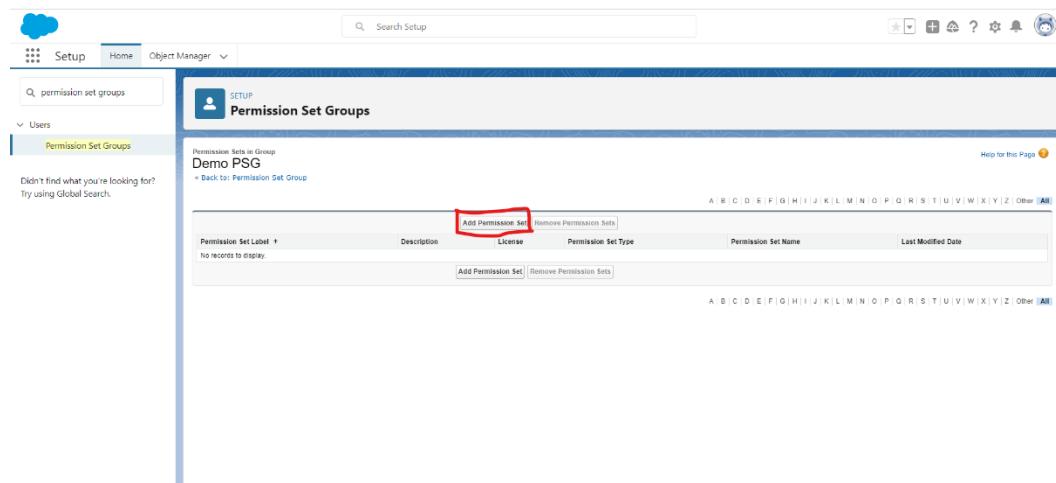
- After that enter the label name, description and click on save.



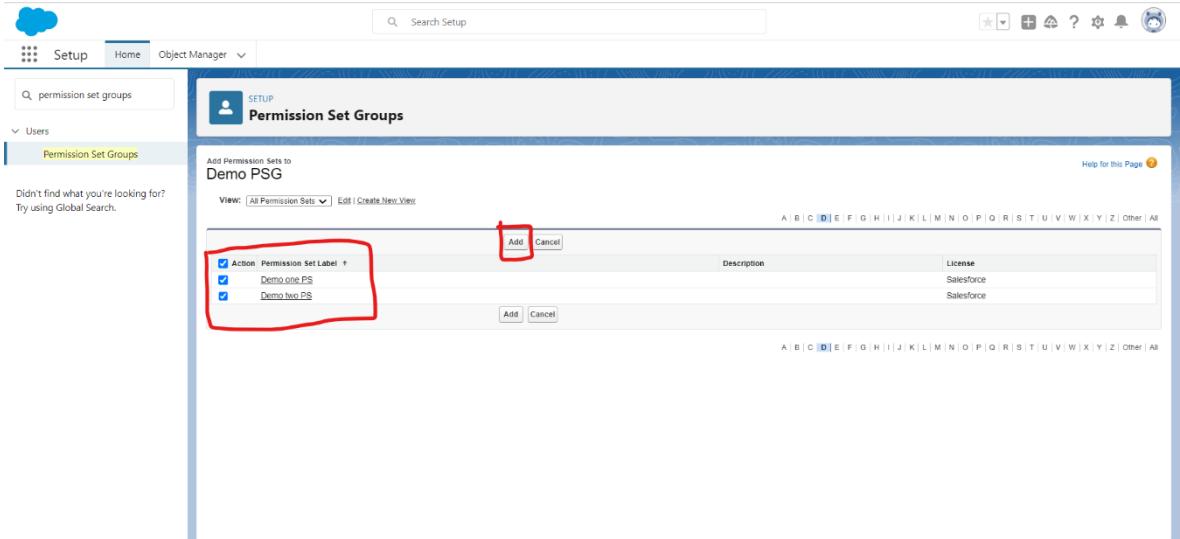
- after that new page will open. From permission sets click on **permission sets in group**.



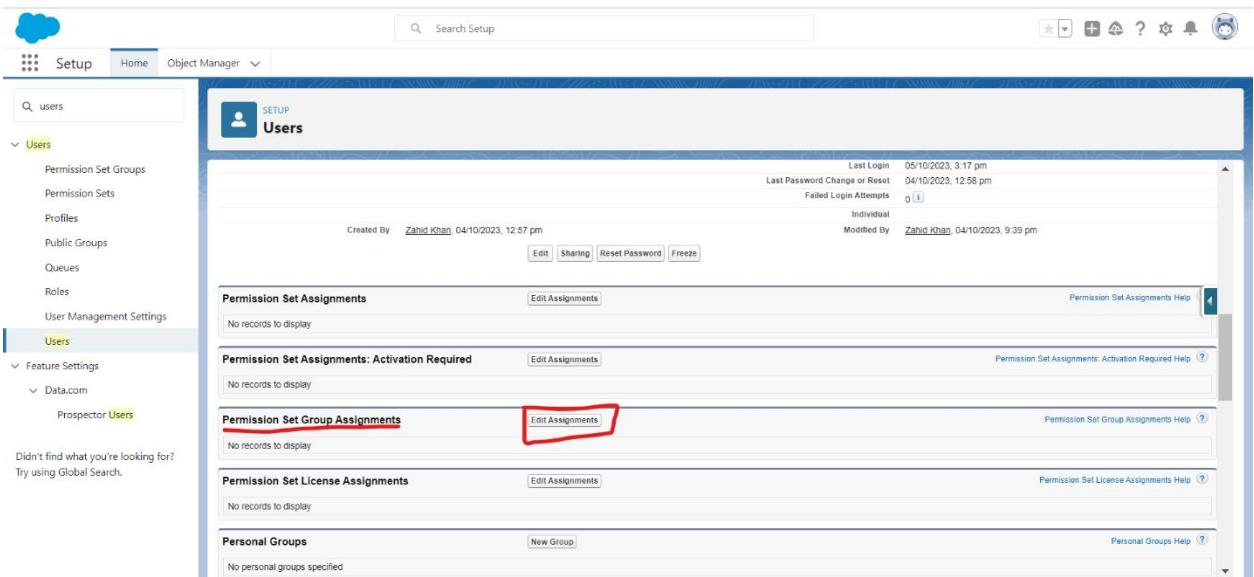
- After that click on Add permission set.



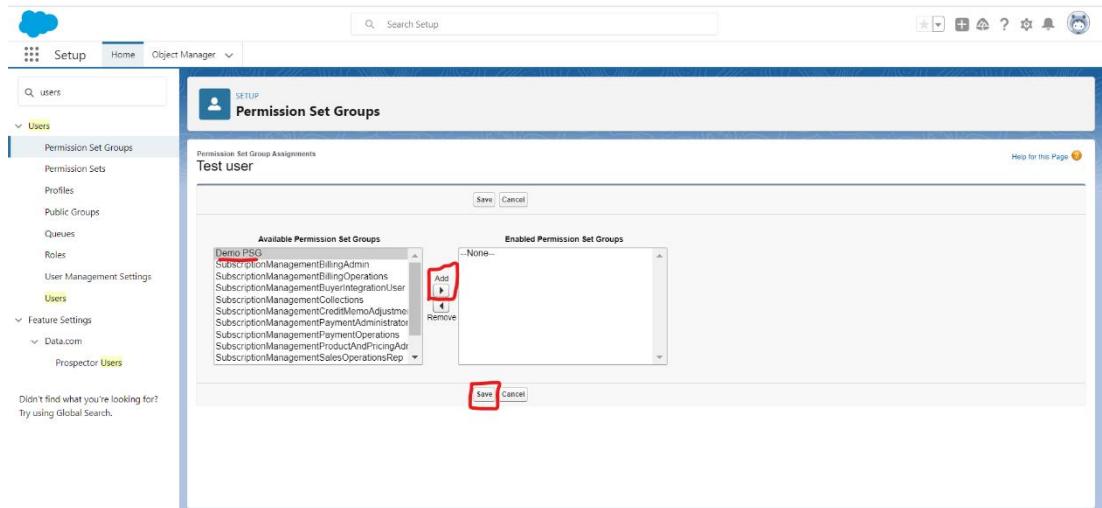
- After that search for created permission set and check the box beside permission set and click on Add. And click on done.



- Now permission set group is created. Now we are going to assign test user.
- For this search for User in quick search box and click on it. After that click on text user.
- Scroll down we will see a permission set group assignment. And click on edit assignment.



- After that click on demo PSG which we created and click on add button so that Demo PSG will add to this user. And click on save.



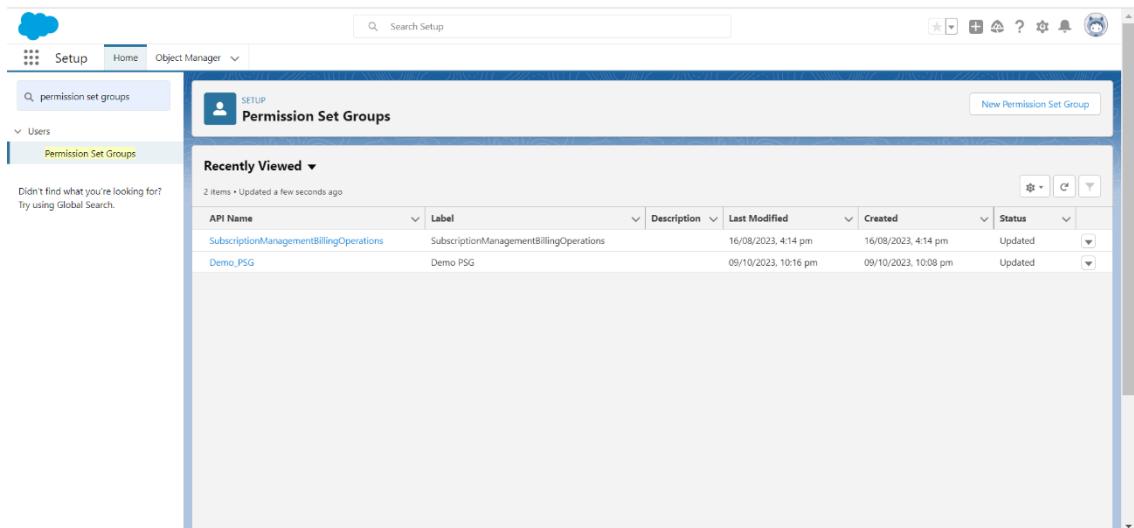
- now Permission set group assigned to the test user. Login test user in another browser and check the results.

What is MUTE in permission set group?

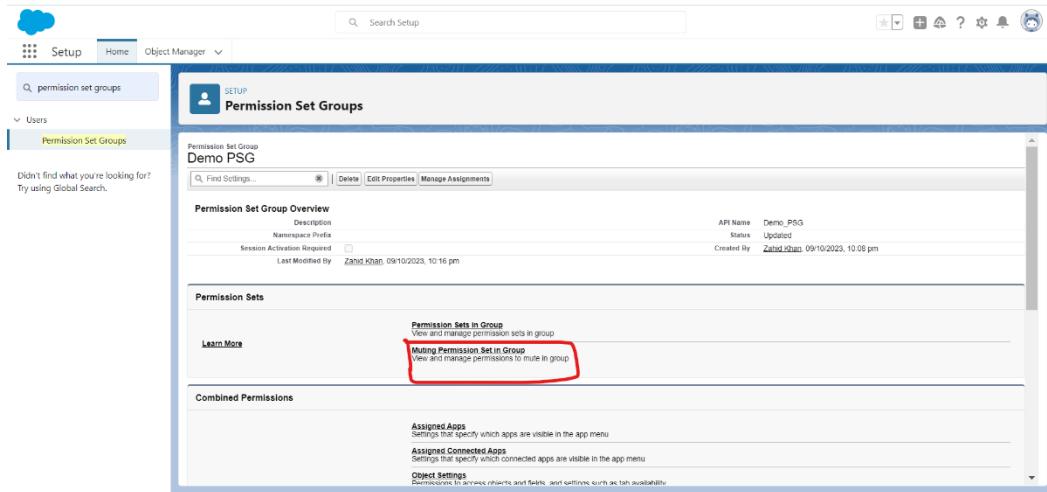
- One can mute some permission set groups so that they won't be given to the user.
- If you mute particular permission in permission set group then it won't impact individual permission set, they remain intact.
- You can anytime unmute the permission in permission set group.

Steps to enable MUTE in permission set group:

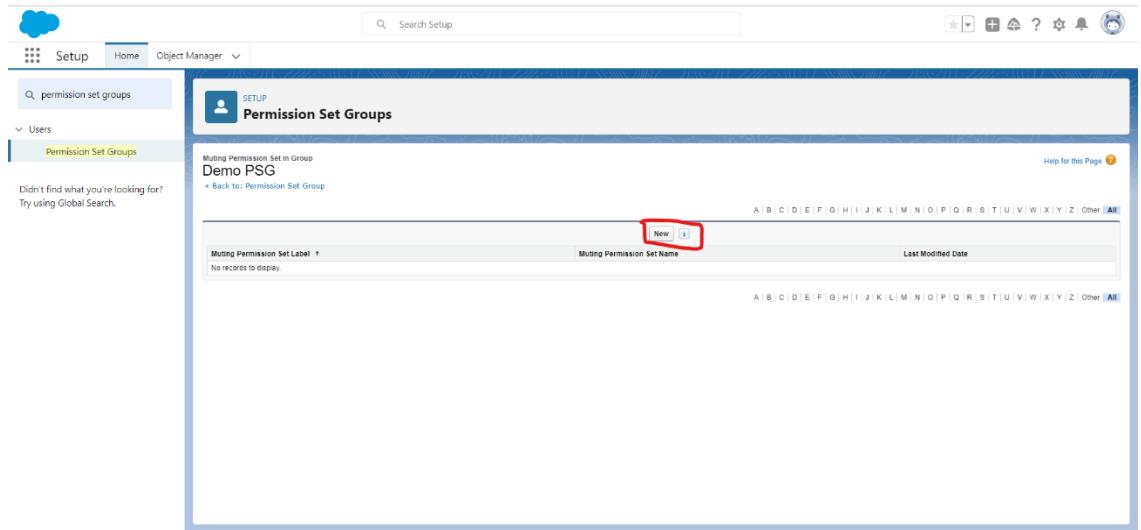
- For example, we have a requirement that we don't want to delete access to the test user so, instead of deleting it we can mute the delete access. After that user don't have access to the delete access.
- We are going to mute the delete access from demo two PS permission set through permission set group.
- Search for permissions set group in quick search and click on it.



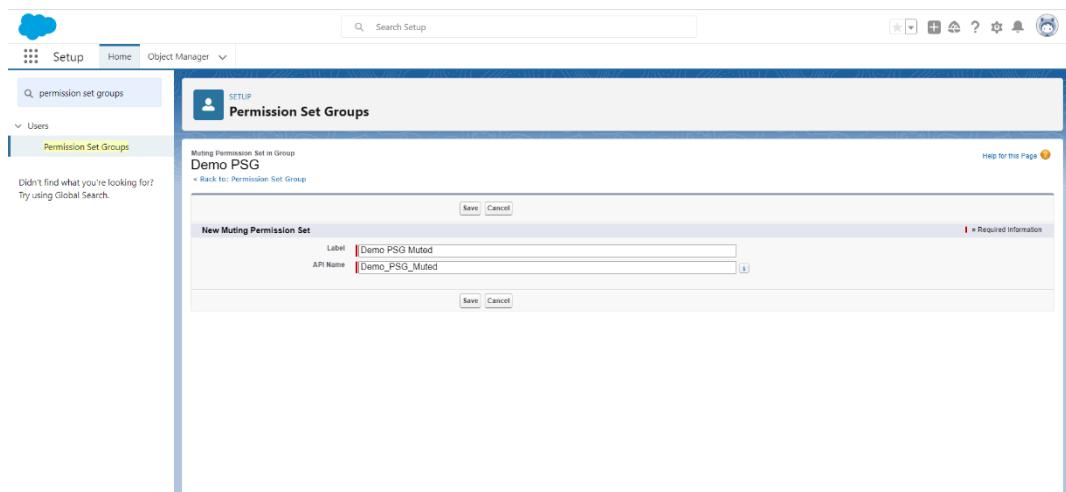
- After that click on permissions set group name e.g., Demo PSG.
- After that click on **Muting permissions set in group**.



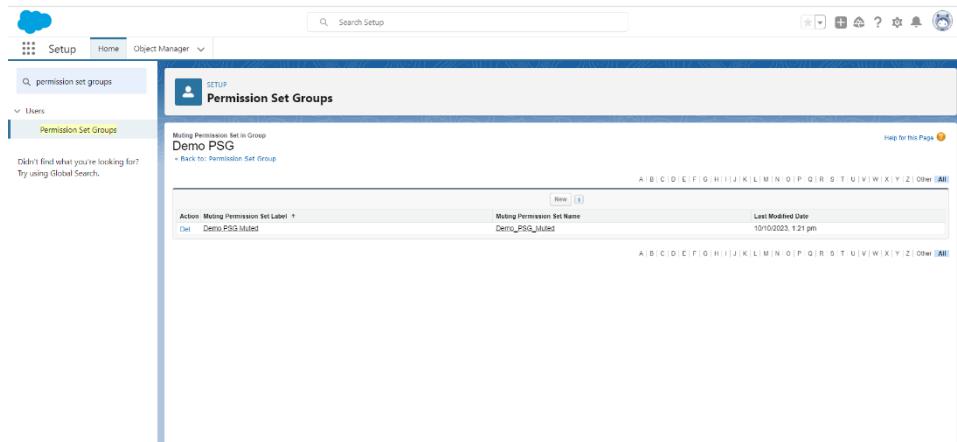
- After that click on New.



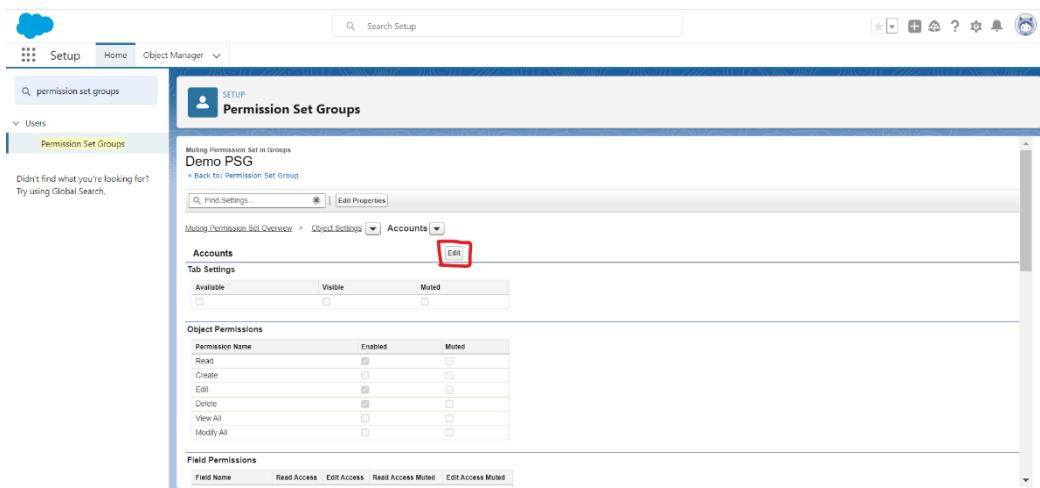
- After that enter the label and click on save.



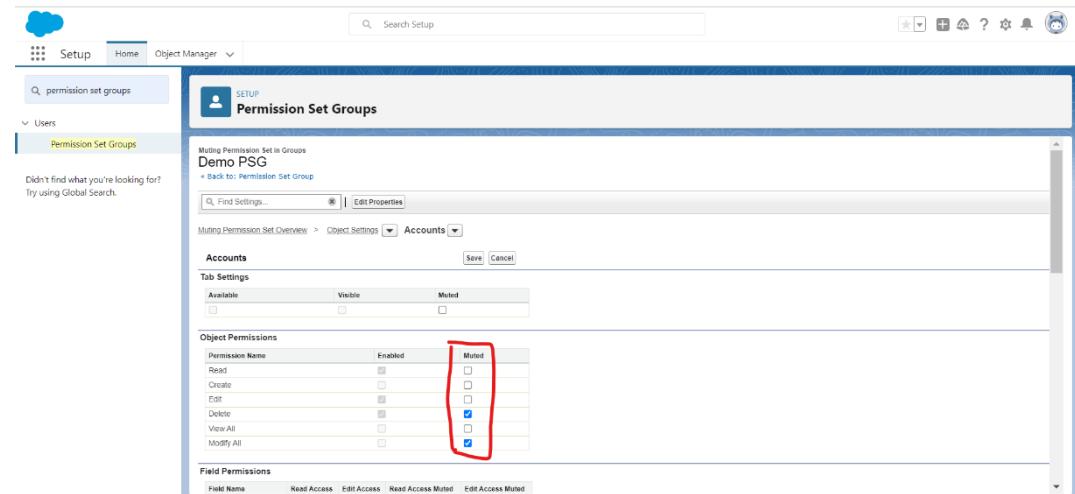
- After that click on newly created Muted permissions set.



- Click on object settings. After that click on account object because we want to mute delete permissions from account object.
- After clicking on object settings all access will be shown.
- Click on Edit.



- Now check the delete box in muted column.



- After click on save. We can also mute read and edit access of any field.
- Now log-In test user and check the results.
- If we want to unmute the permissions, we can do this by unchecking the muted box.

Record level security

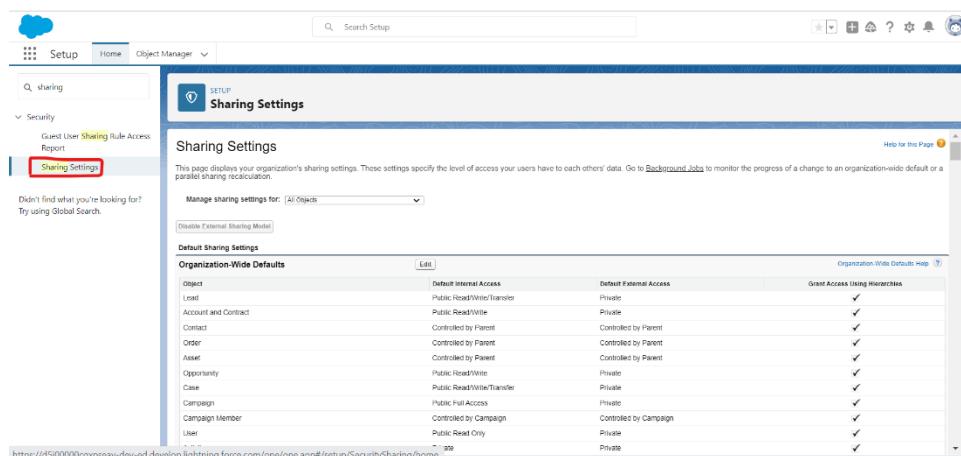
- You can restrict access to records for users, even If user has object level permissions.
- For example, a user can view his own records but not others.
- You can manage record level access in following ways:
 - I. Organizational-wide defaults.
 - II. Role hierarchies.
 - III. Sharing rules.
 - IV. Manual rules.

Organizational-wide defaults.

- If we want to restrict record access which means logged user can only see that records which is created by him/her not by other users. For this we have to apply organizational wide defaults.
- OWD specified the default level of access of records.
- Org-wide sharing setting lock down the data to the most restrictive level.
- Here you have three access level:
 - I. Private.
 - II. Public read-only.
 - III. Public read/write.
- You can use other record level security and sharing tools to open up the sharing of records.

Steps to create organizational-wide default:

- Search for sharing settings in quick search box. And click on it.



- In sharing settings, we can see organizational-wide defaults. In which we got all the objects with two option default internal access and default external access.
 1. The user which is created in our org. will be affected by the default internal access. Now we are focusing on default internal access.
 2. The experience site is controlled by the default external access.
- Here, we are taking example of account object and make the record of account object private so that the logged in user only can see the records which is created by them. We can also apply OWD to custom object.
- Click on edit.

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The 'Sharing Settings' section contains a table titled 'Organization-Wide Defaults'. The table has columns for 'Object', 'Default Internal Access', 'Default External Access', and 'Grant Access Using Hierarchies'. The 'Edit' button for the 'Account' object is highlighted with a red box. The table data is as follows:

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public ReadWriteTransfer	Private	✓
Account and Contract	Public ReadWrite	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public ReadWrite	Private	✓
Case	Public ReadWriteTransfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓

- In account and contact sections choose private option from drop-down and click on save.

The screenshot shows the 'Organization-Wide Sharing Defaults Edit' page in the Salesforce Setup. The 'Default Internal Access' dropdown for the 'Account' object is highlighted with a red box and set to 'Private'. The 'Save' button is also highlighted with a red box. The table data is as follows:

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public ReadWriteTransfer	Private	✓
Account and Contract	Private	Private	✓
Order	Controlled by Parent	Controlled by Parent	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Private	Private	✓
Case	Private	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Individual	Public ReadWrite	Private	✓
Voice Call	Private	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Printout	Public Downloadable	Public Downloadable	✓

- After few seconds the account and contact default internal access will be converted to private for all user of that org. e.g., test user.

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to Background Jobs to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: All Objects

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Private	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Private	Private	✓
Case	Private	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓

- now log-In test user on another browser and go to the tab of account object. We can see that only records which is created by test user.

All Accounts

1 item • Sorted by Account Name • Filtered by All accounts • Updated a few seconds ago

Account Name	Account Site	Billing State/Province	Phone	Type	Account Owner Alias
zahid					tuser

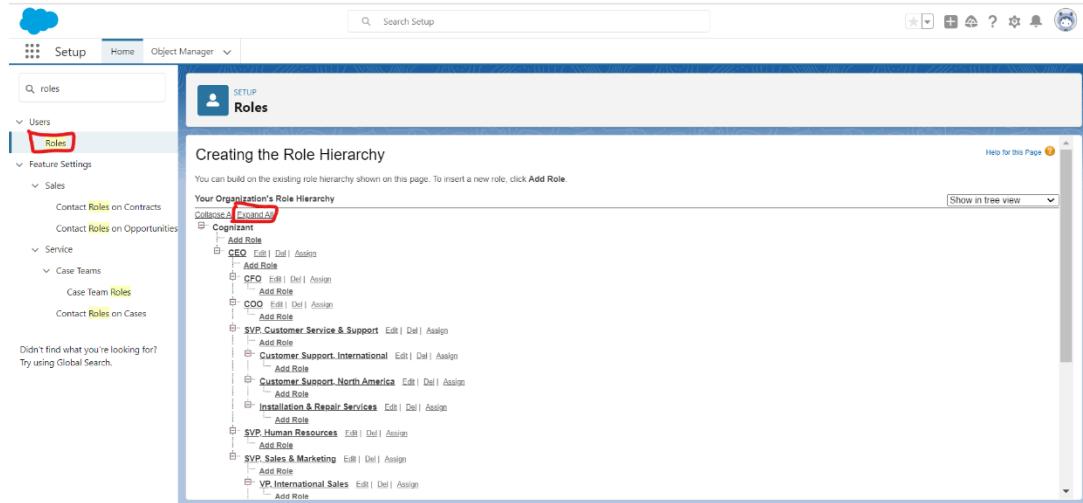
- System admin will see all the records, but test user didn't.

Role Hierarchies:

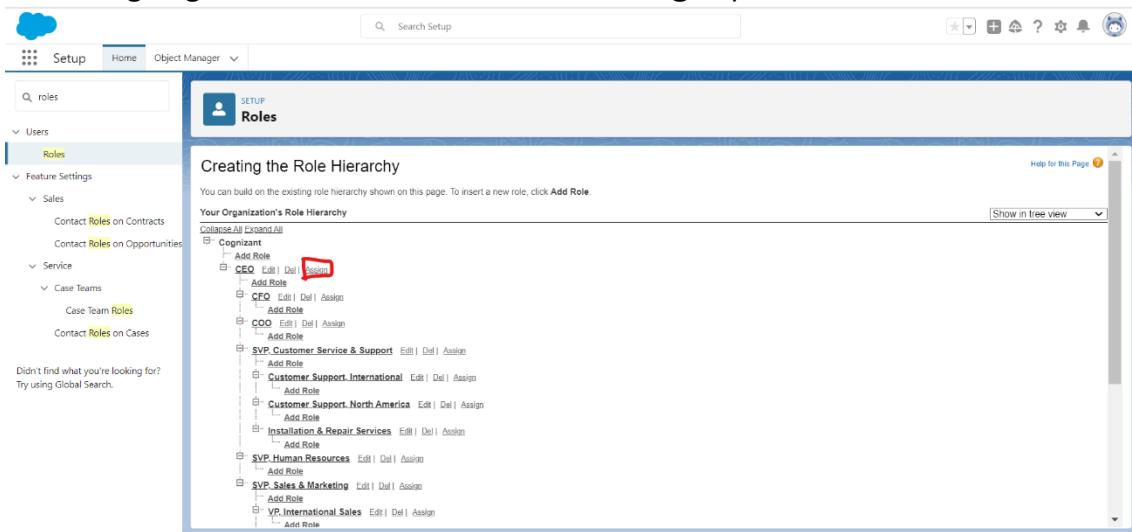
- Previously, we created OWD so that test user unable to see the records of another user. But we want to show the record which is created by system administrators for this we use role hierarchy.
- It gives access for users higher in the hierarchy.
- That user can access all records owned by the users below them in the hierarchy.
- Each role in the hierarchy should represent a level of data access that a user or group of user needs.

Steps to configure Role hierarchy:

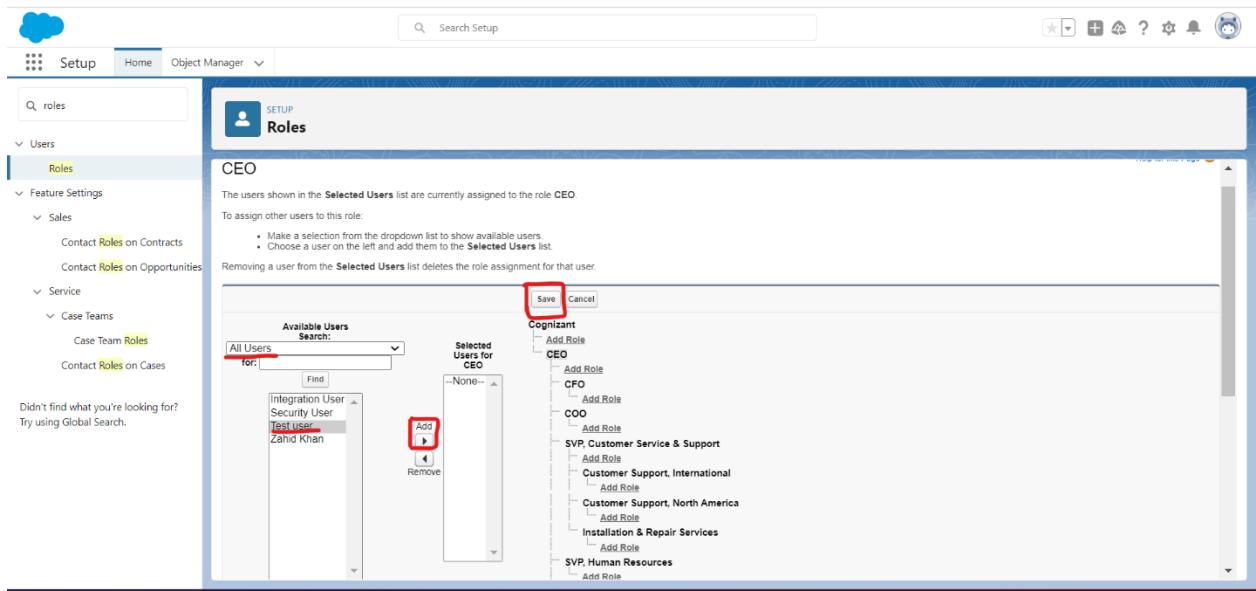
- Search for Roles in quick search box and click on it. After that click on expand all so that will see all the roles.



- Here, we can see all delete, Edit, and assign option with users and we can add Role under any role with Add role options.
- Every higher role will see the records of their below role. Like, CEO can see the records of all the role which is below them. We can also create hierarchy under any role.
- Here, we are assigning CEO role to test user and CFO role to system administrators.
- For assigning CEO role to test user click on **Assign** option.



- After that select all user and from them select the Test user and click on Add.
- After that click on save.



- same way we are assigning CFO role to system administrators.
- Now log-in test user and see the effect that test user able to see all the records which is in system administrator role because test user is CEO which is higher

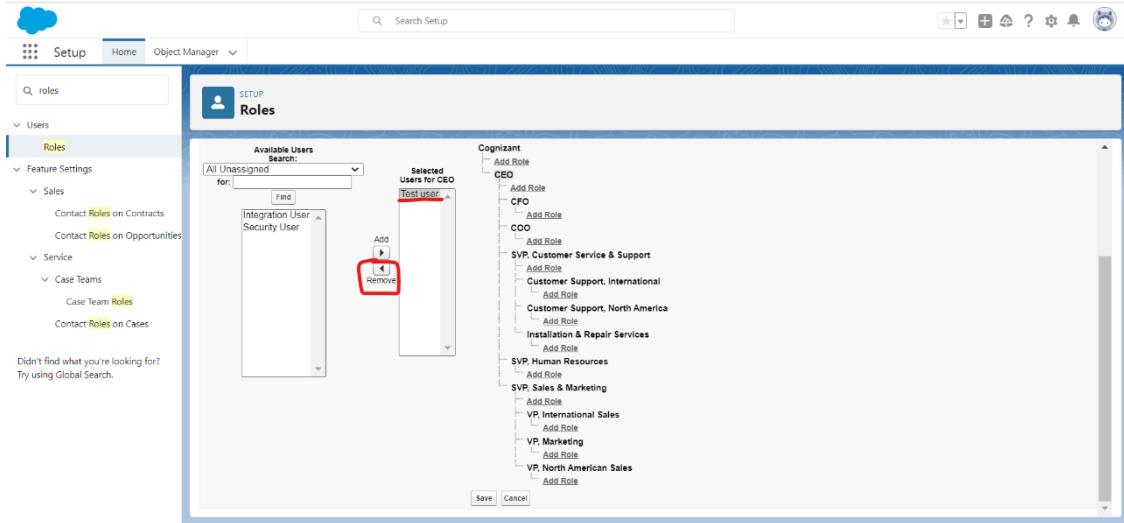
	Account Name	Account S...	Billing State/Pr...	Phone	Type	Account Ow...
1	Burlington Textiles Corp of America		NC	(336) 222-7000	Customer - Direct	ZKhan
2	Dickenson plc		KS	(785) 241-6200	Customer - Channel	ZKhan
3	Edge Communications		TX	(512) 757-6000	Customer - Direct	ZKhan
4	Express Logistics and Transport		OR	(503) 421-7800	Customer - Channel	ZKhan
5	GenePoint		CA	(650) 867-3450	Customer - Channel	ZKhan
6	Grand Hotels & Resorts Ltd		IL	(312) 596-1000	Customer - Direct	ZKhan
7	Pyramid Construction Inc.			(014) 427-4427	Customer - Channel	ZKhan
8	sForce		CA	(415) 901-7000		ZKhan
9	United Oil & Gas Corp.		NY	(212) 842-5500	Customer - Direct	ZKhan
10	United Oil & Gas, Singapore		Singapore	(650) 450-8810	Customer - Direct	ZKhan
11	United Oil & Gas, UK		UK	+44 191 4956203	Customer - Direct	ZKhan

than CFO.

Sharing Rule:

- When we have to share the records with particular people or particular group of people, so we have to use sharing rule. Because in role hierarchy we can only share record in hierarchy.
- There are exceptions to org-wide defaults.
- Through sharing rules, you can share records to a group of users.
- So that, they can get access to the records they don't own or can't manually see.

- Before making the sharing rule we have to unassign the test user from CEO and system administrator from CFO. Because we have only one user in free license account. For this again click on assign and select the user and click on remove

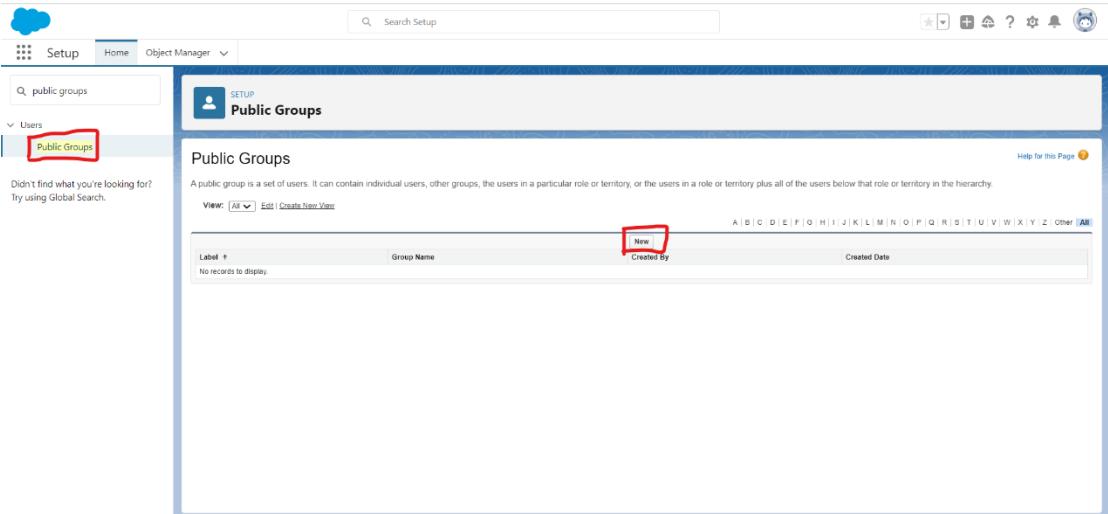


button and save.

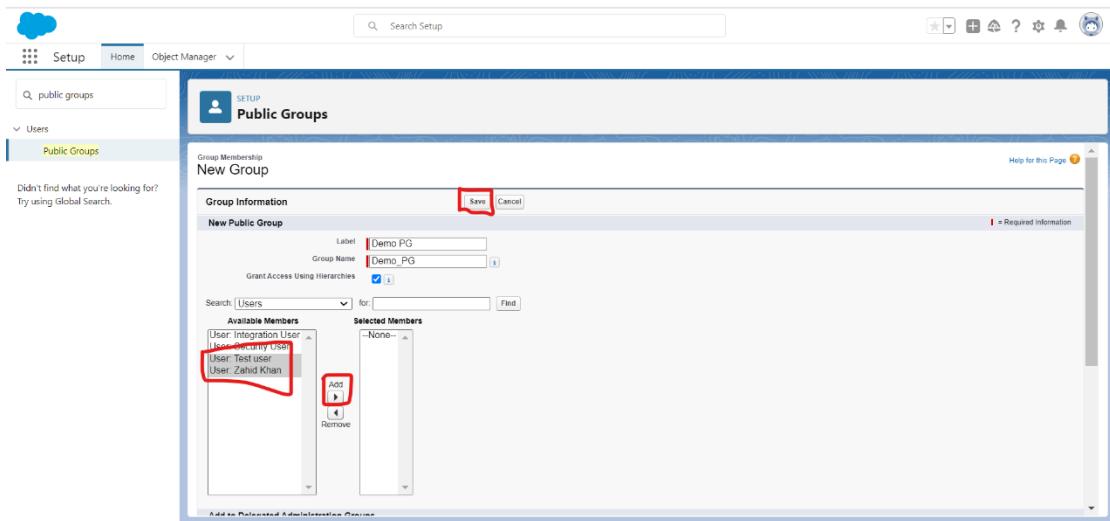
- Same way unassigned system administrator from CFO. And check in test user by log-in it that it unassigned or not.

Steps to create sharing rule (based on records owner):

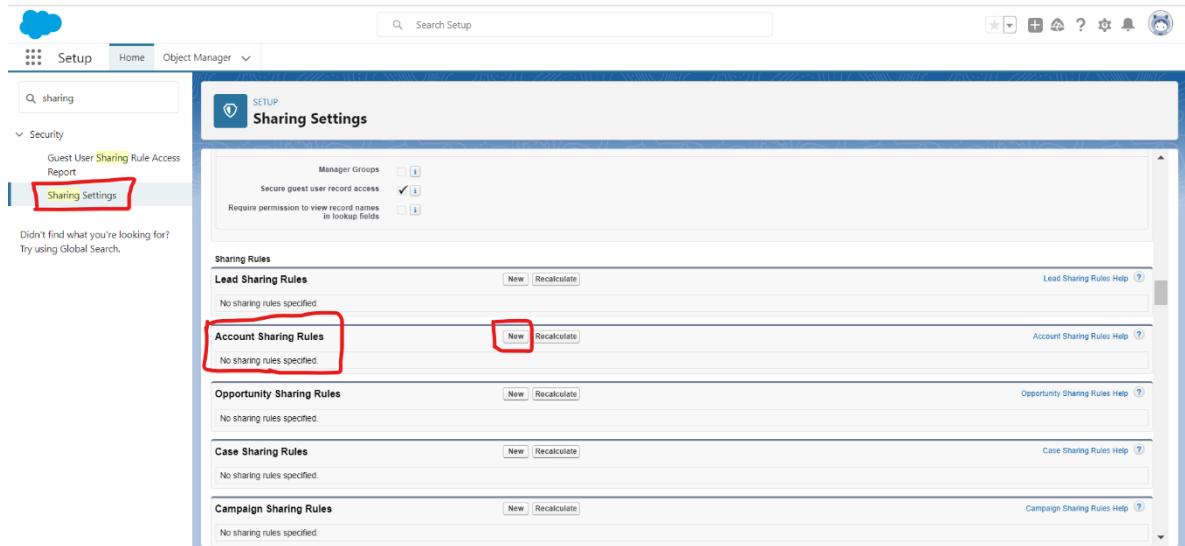
- Before creating sharing rule, we have to create a public group. For this search for **public group** in search box and click on it. After that click on new.



- After that enter label and group name. in search option select users so that all users will be visible. Select the users, click on add button and click on save.
- This way public group is created and all user to which we want to share the record will add to this public group.



- After that we will create sharing rule.
- Search for **sharing settings** in quick search box. And click on it.
- After that scroll down so we will get all sharing rule of all objects. Here, we are taking example of account object.
- After that click on new.



- Now we get 5 steps 1st to enter label name and Rule name.
- 2nd steps select your Rule type which contain 2 options **based on record owner** and **based on criteria**. Here, we are selecting **based on record owner** option.
- 3rd steps **select which records to be shared** which means the record who is created. For this we already created public group and add the user so that the record of those user.
- 4th steps **select the users to share with** which means with whom you want to share the report. Here, we are selecting public group and all internal user because currently we don't have much user.
- 5th **select the level access for the users**. This is select as per requirements.

- After entering this value click on save.

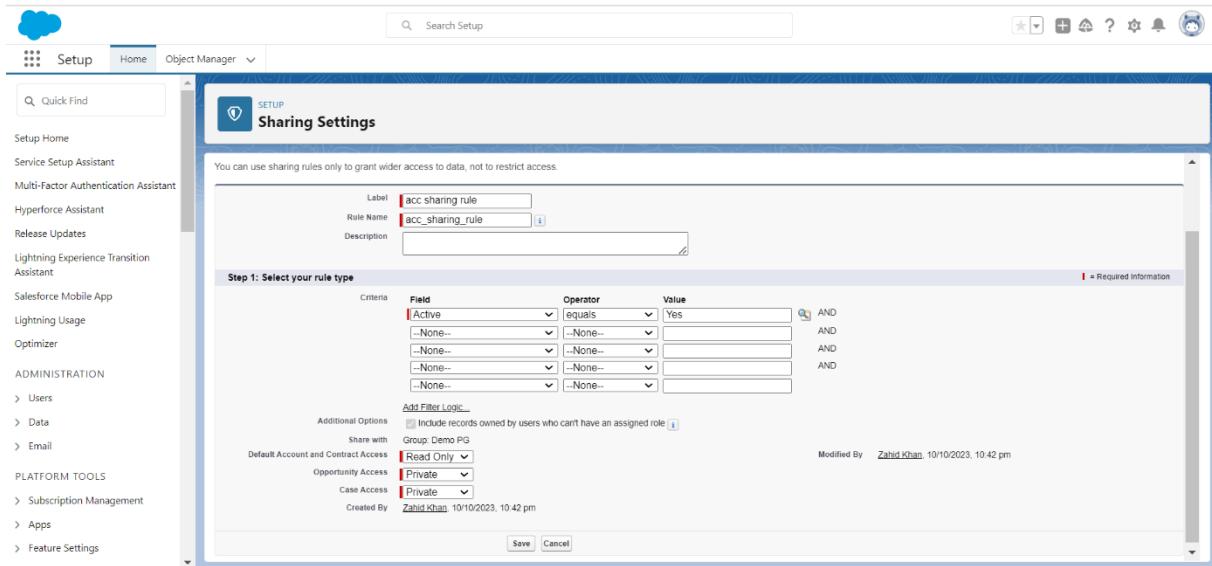
- Now sharing rule for account has been created.

- Now go to test user and test the result. We will see all the records in test user because we add the system administrator and test user in same group.

Steps to create sharing rule (based on criteria):

- If we want to share only some records based on criteria with another user so we have to choose option based on criteria.
- Again, search for sharing settings and click on it. After that scroll down and go to account sharing rule. And click on new.
- This time we have to choose based on criteria in step 2. After that we have to make criteria for showing the records. For example, we are selecting Active in field, operator equal and value is yes. Like this we can add criteria based on the requirements.

- After that select public group demo PG in step 4. And click on save.



- This way sharing rule created based on criteria. Now go to test user and check the results. All records will be visible whose active field is yes.

	Account Name	Account Site	Billing State/Prov	Phone	Type	Account Owner
1	Dickenson plc	KS	(785) 241-6200		Customer - Channel	ZKhan
2	Edge Communications	TX	(512) 757-6000		Customer - Direct	ZKhan
3	Express Logistics and Transport	OR	(503) 421-7800		Customer - Channel	ZKhan
4	GenePoint	CA	(650) 867-3450		Customer - Channel	ZKhan
5	Grand Hotels & Resorts Ltd	IL	(312) 596-1000		Customer - Direct	ZKhan
6	Pyramid Construction Inc.		(014) 427-4427		Customer - Channel	ZKhan
7	United Oil & Gas Corp.	NY	(212) 842-5500		Customer - Direct	ZKhan
8	United Oil & Gas, Singapore	Singapore	(650) 450-8810		Customer - Direct	ZKhan
9	United Oil & Gas, UK	UK	+44 191 4956203		Customer - Direct	ZKhan
10	University of Arizona	AZ	(520) 773-9050		Customer - Direct	ZKhan
11	zahid					tuser

Manual sharing rule:

- It allows owners of particular records to share them with another users.
- Manual sharing is not automated like org-wide defaults, role hierarchy or sharing rules.
- It can be useful in some situations where you manually want to share a record with another user.
- We can share individual records with any users.
- we are sharing other records other than sharing rules. Which is created account sharing rule based on criteria.

- If the user doesn't have access to the report and we share report by manual sharing rule so that user can see those records.

Steps to create manual sharing rule:

- Manual sharing rule will work in front-end of the App.
- For example, we are taking example of account object in sales app.
- Click on Account object and open any records.
- After that click on drop-down arrow at right hand side. And click on Sharing.

The screenshot shows the Salesforce interface for an Account record. The top navigation bar includes Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, and More. The main content area displays the account details for 'Burlington Textiles Corp of America'. On the right side, there is a Chatter sidebar with a sharing menu. The 'Sharing' option is circled in red.

- After that share pop-up screen will open. We have to enter the user's name of the user to which we want to share these records.
- Here, we are taking the example of Test user because we have only test user in free account.
- We can also provide read/write access of those records.
- After that click on save. So, that those records are shared with test user.

The screenshot shows the 'Share' dialog box for the account record. It includes fields for Account Access (Read Only), Case Access (Private), and Opportunity Access (Private). The 'Search' field contains 'Test user'. At the bottom right, the 'Save' button is circled in red.

- Now log-in test user and check the result those records will share with test user.

The screenshot shows the Salesforce Accounts page titled 'All Accounts'. It displays a list of 6 items, sorted by Account Name. The first item, 'Burlington Textiles Corp of America', is highlighted with a red box. The columns include Account Name, Account Number, Billing Street, Phone, Type, Account Owner, and Active status. The interface includes a search bar, filters, and a toolbar at the top.

- If we want to remove the access from the test user of those records again open that records on system administrators and again click on sharing option.
- After that click on edit so all user lists will be visible.

The screenshot shows the 'Share' settings for the 'Burlington Textiles Corp of America' account. It displays sharing information for three groups: Account Access (Read Only), Case Access (Private), and Opportunity Access (Private). A message indicates 'Shared with 2 groups of users.' Below this, there is an 'Edit' button highlighted with a red box. The main account details are visible on the left, and a note about past activity is on the right.

- If you want to revoke the access of any records just click on the cross sign beside the user's name.
- We can also edit the read/write access of the records.
- Click on save to affect the changes.

The screenshot shows the 'Share' settings for the same account after changes. The 'Opportunity Access' dropdown for 'Test user' is now set to 'Private' and has a red 'X' icon next to it, indicating it has been removed or is being edited. The other sharing settings remain the same as in the previous screenshot.

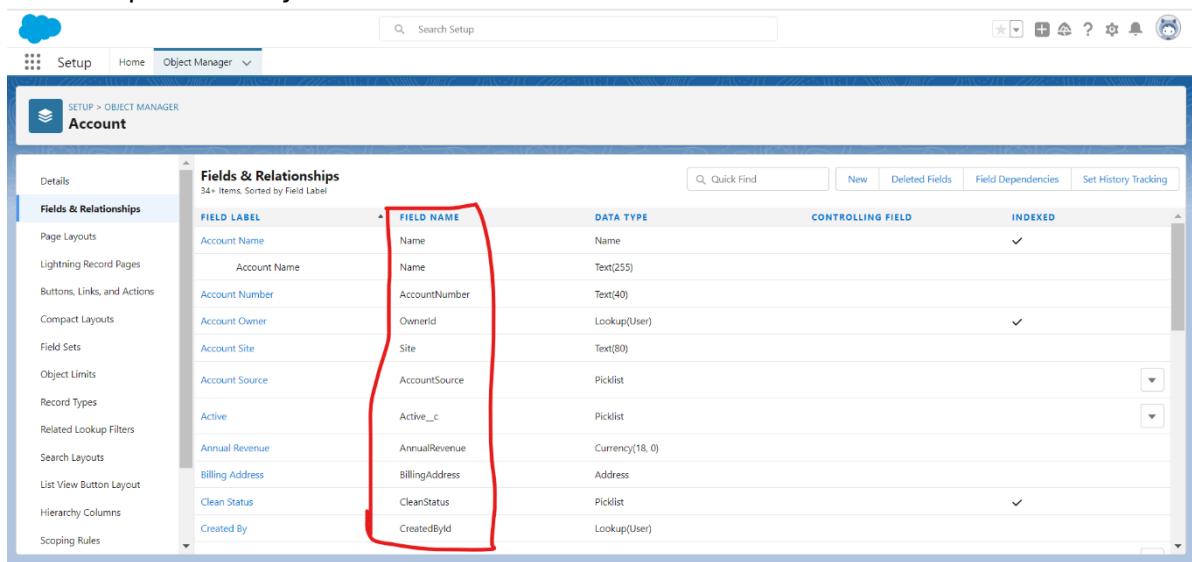
Day-13

Data import wizard

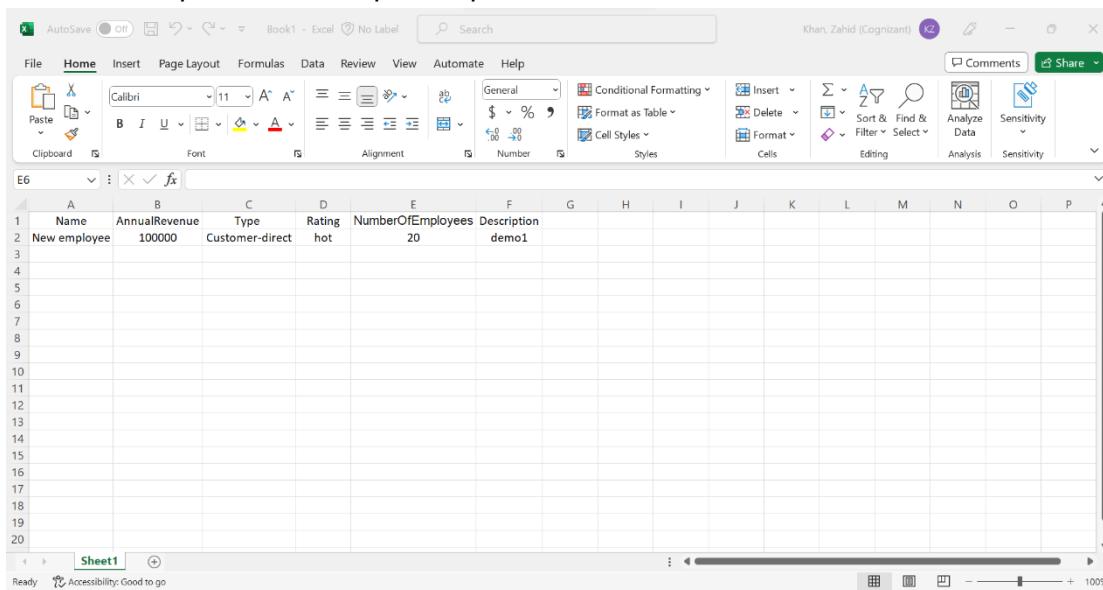
- It helps to import data from excel/csv format into salesforce.
 - One can find this in setup.
 - One can import up to 50,000 records at a time.
 - One can perform insert, update, & upsert operations.

Steps to create data import wizard (insert):

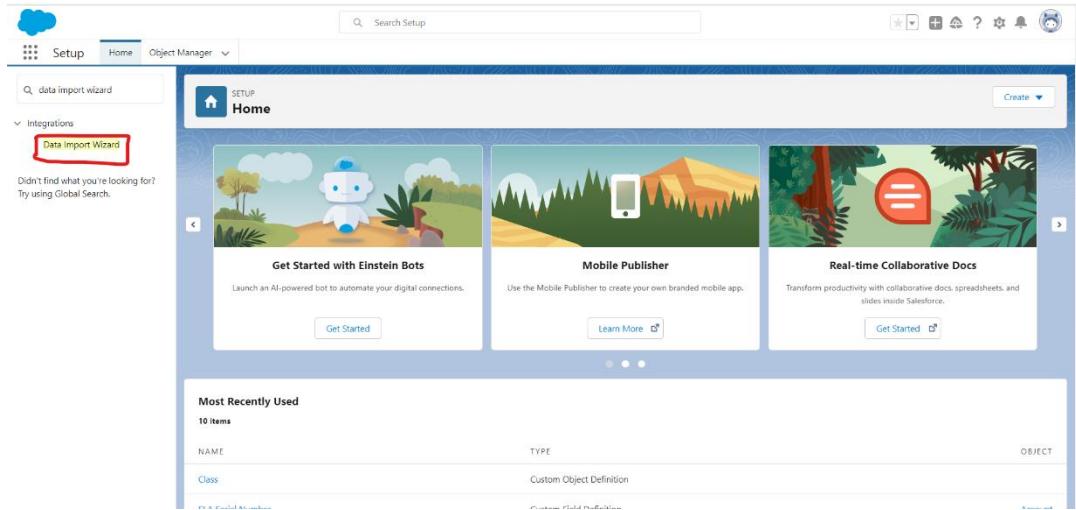
- First of all, create a record of the field in a excel file which we want to insert from the computer. Always use record name in excel.



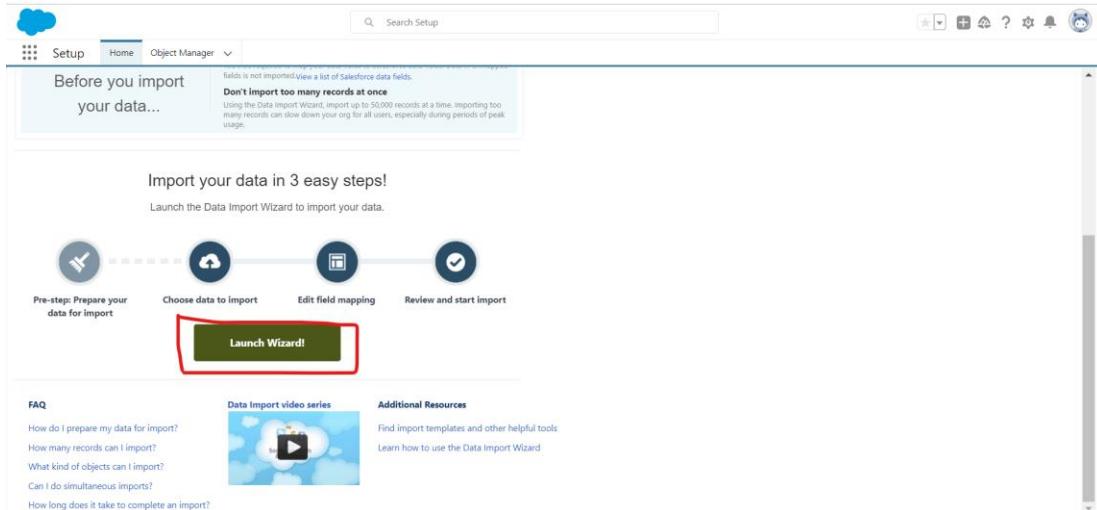
- Like, below we can create number of records in excel file and import it in our org. but data import wizard imports up to 50,000 records.



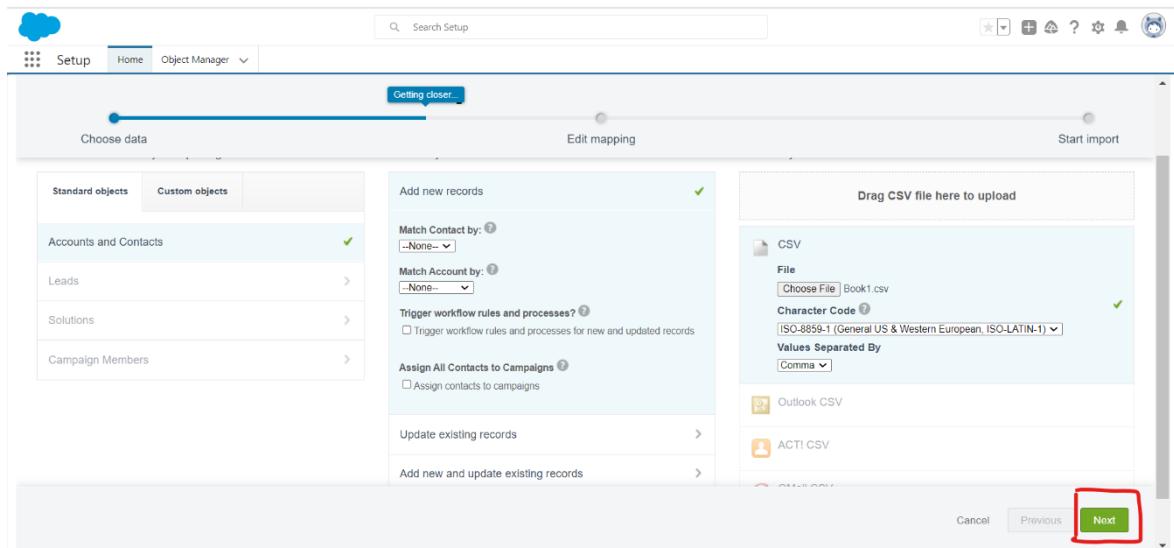
- Now go to set-up and search for **Data import Wizard** in quick search box. And click on it.



- Scroll down and click on Launch wizard.



- After that **import your data into salesforce** window will be open. In which we got 3 options.
 - What kind of data you are importing?** In this option we got standard and custom object list.
 - What do you want to do?** In this option we got 3 options insert, update and upsert (insert as well as update).
 - Where is your data is located?** Means where our excel file is located.
- Here, we are taking example of account object (standard object).
- Select Account object under standard object.
- After that select **Add new records**.
- after that click on next.



- After that we have to do mapping of excel file records with object field heading. Mostly it will be mapped if not then we get map option in edit field.
- In below image we can see that active field is not mapped so we have to map by clicking on Map option in edit column.

The screenshot shows the 'Edit Field Mapping' screen for 'Accounts and Contacts'. The title is 'Edit Field Mapping: Accounts and Contacts'. A note says 'Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.' Below is a table:

Edit	Mapped Salesforce Object	CSV Header	Example
Change	Account: Account Name, Contact: Name	Name	New employee
Change	Account: Annual Revenue	AnnualRevenue	100000
Change	Account: Type	Type	Customer-direct
Change	Account: Rating	Rating	hot
Change	Account: Employees	NumberOfEmployees	20
Change	Account: Description, Contact: Description	Description	demo1
Map	Unmapped	Active__c	yes

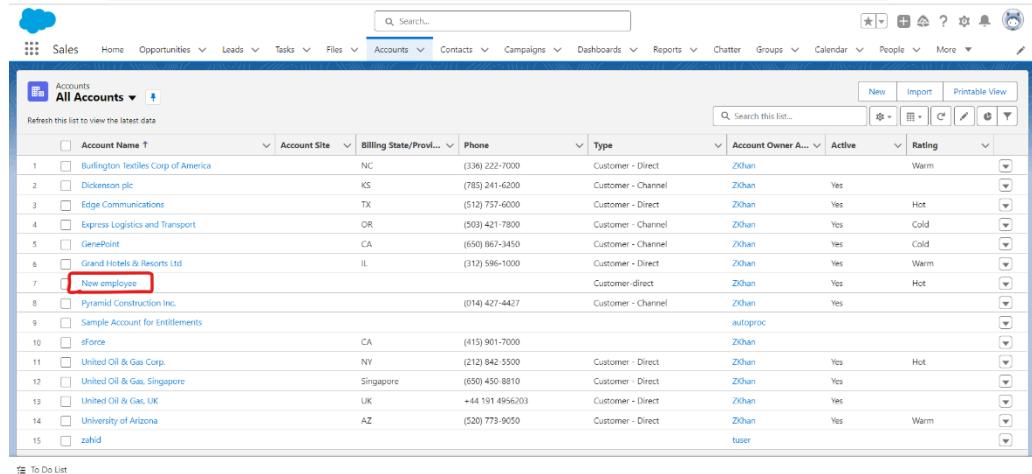
At the bottom right are 'Cancel', 'Previous', and 'Next' buttons. The 'Unmapped' row is highlighted with a red box.

After that search for field in which we want to map that unmapped field. Here, Active filed is unmapped so we have to search for Active.

- After that search for field in which we want to map that unmapped field. Here, Active filed is unmapped so we have to search for Active.

- And click on Map.
- After that click on next.
- After that click on start import.

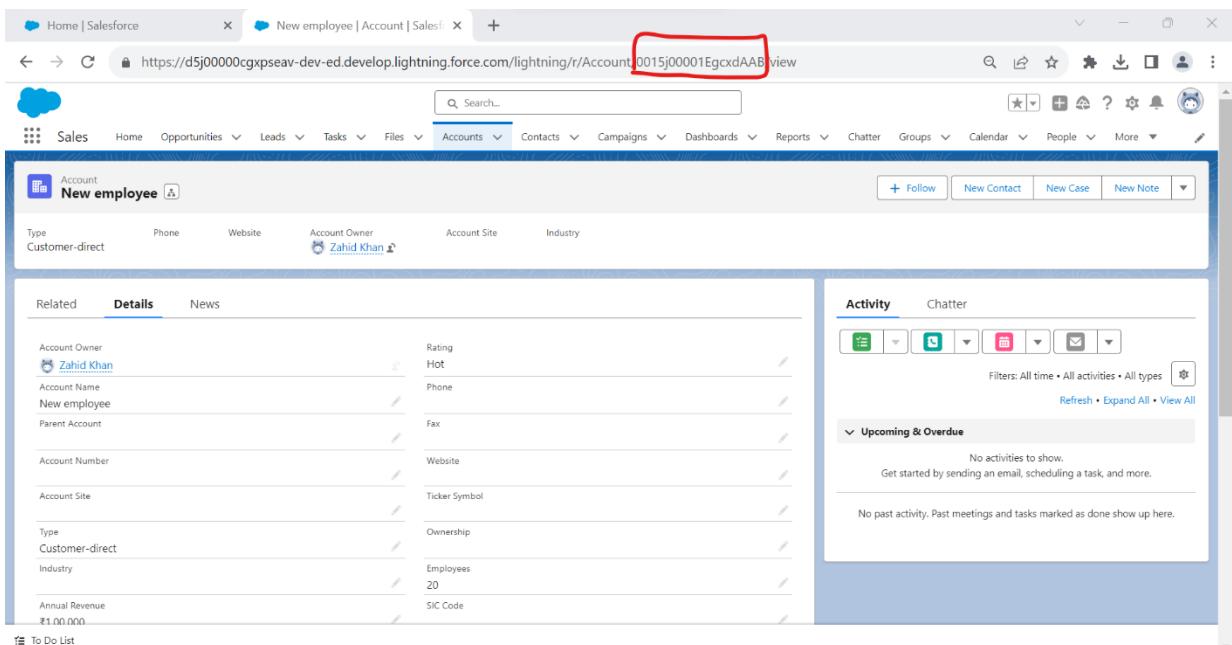
- After that go to front-end of the sales app and click on accounts object. We will see the records which we import.



	Account Name	Account Site	Billing State/Prov...	Phone	Type	Account Owner A...	Active	Rating
1	Burlington Textiles Corp of America	NC	(336) 222-7000		Customer - Direct	Zahid Khan	Yes	Warm
2	Dickenson plc	KS	(785) 241-6200		Customer - Channel	Zahid Khan	Yes	Hot
3	Edge Communications	TX	(512) 757-6000		Customer - Direct	Zahid Khan	Yes	Hot
4	Express Logistics and Transport	OR	(503) 421-7800		Customer - Channel	Zahid Khan	Yes	Cold
5	GenePoint	CA	(650) 867-3450		Customer - Channel	Zahid Khan	Yes	Cold
6	Grand Hotels & Resorts Ltd	IL	(312) 596-1000		Customer - Direct	Zahid Khan	Yes	Warm
7	New employee			(014) 427-4427	Customer - Direct	Zahid Khan	Yes	Hot
8	Pyramid Construction Inc.				Customer - Channel	Zahid Khan	Yes	
9	Sample Account for Entitlements					autopro		
10	sforce	CA	(415) 901-7000			Zahid Khan		
11	United Oil & Gas Corp.	NY	(212) 842-5500		Customer - Direct	Zahid Khan	Yes	Hot
12	United Oil & Gas, Singapore	Singapore	(650) 450 8810		Customer - Direct	Zahid Khan	Yes	
13	United Oil & Gas, UK	UK	+44 191 4956203		Customer - Direct	Zahid Khan	Yes	
14	University of Arizona	AZ	(520) 773-9050		Customer - Direct	Zahid Khan	Yes	Warm
15	zahid					tuser		

Steps to update data import wizard:

- To update a record through data import wizard we have to get the id of the existing records.
- To take the id of the records open that records which imported and want to update. And copy the id from address bar.

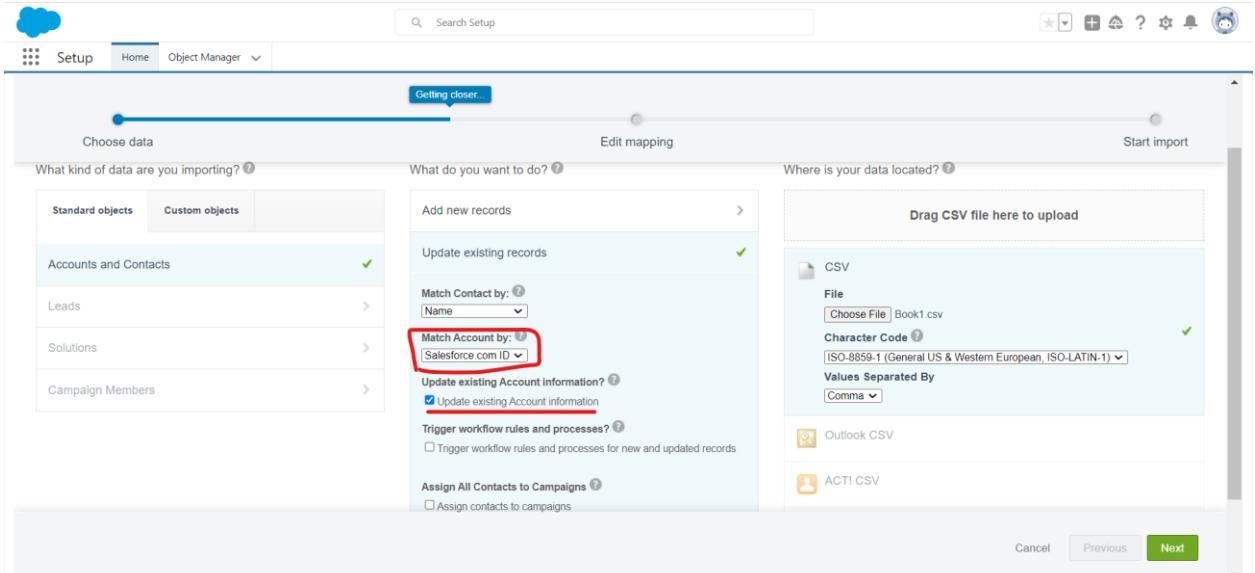


The screenshot shows the Salesforce Lightning interface for an account named 'New employee'. The account details include its type as 'Customer-direct', account owner 'Zahid Khan', and various contact information like phone, fax, and website. On the right side, there's an 'Activity' section showing no upcoming or overdue tasks. The URL in the browser is https://d5j000000cgxpseav-dev-ed.develop.lightning.force.com/lightning/r/Account/0015j00001EgwdxAA#view.

- After that enter id into excel sheet and again import that sheet.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Id	Name	AnnualRevenue	Type	Rating	NumberOfEmployees	Description	Active__c						
2	0015j00001EgcxdAAB	New employee	100000	Customer-direct	hot	20	updated	yes						
3														
4														
5														
6														
7														
8														
9														
10														
11														
12														
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15														
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17														
18														
19														

- Now go to setup and search for **data import wizard** and click on it.
- After that again click on launch wizard.
- After that select Account object because we are taking example of account object.
- After that click on **update existing records**. And select **Match Account by Salesforce.com ID**. and check the **box update existing account information**.
- At last, import the updated csv file from computer.



- Now click on next.
- Again, map the unmapped the salesforce object i.e., Active__c.
- And click on next.
- After that click on import start.
- Now data is updated.

- Go to front-end and check the results.

The screenshot shows the Salesforce interface for an account record. The account name is 'new employee'. The 'Description' field is highlighted with a red box and contains the text 'updated'. Other fields visible include AnnualRevenue (\$1,00,000), Billing Address, Customer Priority, SLA Expiration Date, Number of Locations, Active (Yes), and Last Modified By (Zahid Khan, 14/10/2023, 6:02 pm). A large blue sidebar on the right is partially visible.

- Now records are updated.

Steps to upsert (add new records & update existing records) the records:

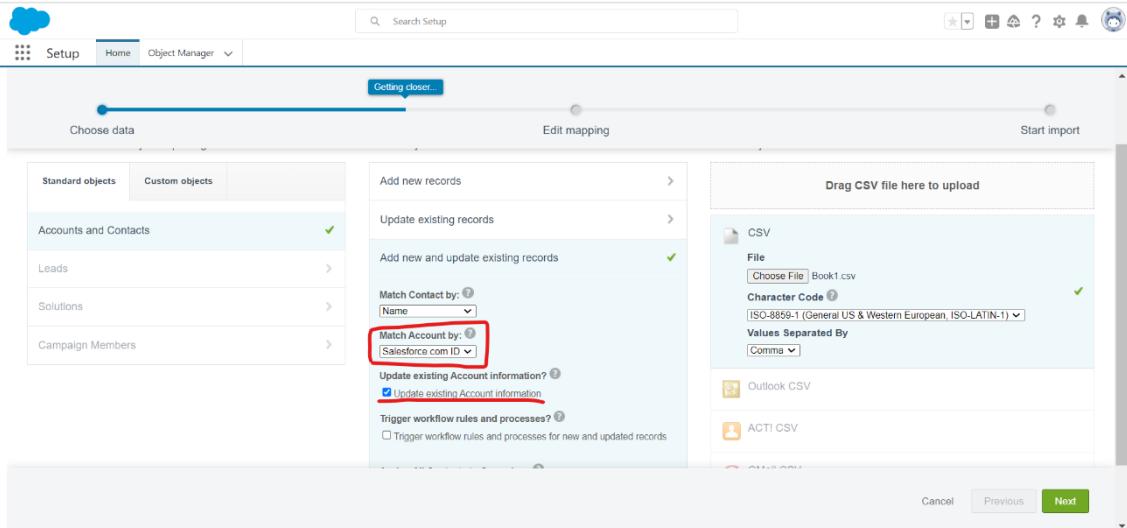
- Make a excel csv file with existing records and new records.

The screenshot shows an Excel spreadsheet titled 'Book1.csv'. The data is organized into columns: Id, Name, AnnualRevenue, Type, Rating, NumberOfEmployees, Description, and Active_c. The first row contains headers, and the second row contains data for two accounts: 'new employee' and 'new employee 2'. The 'Description' column for both rows is set to 'updated'.

	A	B	C	D	E	F	G	H	I	J	K	L
1	A	Name	AnnualRevenue	Type	Rating	NumberOfEmployees	Description	Active_c				
2	0015j00001EgwdxAAAB	new employee	100000	Customer-direct	hot	20	updated	yes				
3		new employee 2	200000	Customer-channel	warm	30	new	yes				

- Now go to setup and again search for data import wizard. And click on it.
- After that click on launch wizard.
- Select account object. After that select **Add new and update existing records**.

- Again, select Match Account by salesforce ID. and check the box update existing account information.
- After that select CSV file. And click on next.



- After that map the unmapped salesforce object and click on next. And click on start import.
- Now data is updated, and new data also imported.
- Go to the sales App and click on accounts tab and check the results.

New imported Records

The screenshot shows the 'Accounts' page in the Sales Cloud. The top navigation bar includes Sales, Home, Opportunities, Leads, Tasks, Files, Accounts (selected), Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, More, and a pencil icon. The main area displays a table of accounts with columns: Account Name, Account Site, Billing State/Prov/..., Phone, Type, Account Owner A..., Active, Rating, and Created. There are 16 items listed. Two specific rows are highlighted with red boxes: row 8 ('new employee') and row 9 ('new employee 2'). The table has various filters and sorting options at the top and bottom.

	Account Name	Account Site	Billing State/Prov/...	Phone	Type	Account Owner A...	Active	Rating	Created
1	Burlington Textiles Corp of America	NC	(336) 222-7000		Customer - Direct	ZKhan		Warm	16/08
2	Dickenson plc	KS	(785) 241-6200		Customer - Channel	ZKhan	Yes	Hot	16/08
3	Edge Communications	TX	(512) 757-6000		Customer - Direct	ZKhan	Yes	Cold	16/08
4	Express Logistics and Transport	OR	(503) 421-7800		Customer - Channel	ZKhan	Yes	Cold	16/08
5	GenePoint	CA	(650) 867-3450		Customer - Channel	ZKhan	Yes	Hot	16/08
6	Grand Hotels & Resorts Ltd	IL	(312) 596-1000		Customer - Direct	ZKhan	Yes	Warm	16/08
7	new employee				Customer-direct	ZKhan	Yes	Hot	14/10
8	new employee 2				Customer-channel	ZKhan	Yes	Warm	14/10
9	Pyramid Construction Inc.		(014) 427-4427		Customer - Channel	ZKhan	Yes	Hot	16/08
10	Sample Account for Entitlements				autopro				16/08
11	sForce	CA	(415) 901-7000		ZKhan				16/08
12	United Oil & Gas Corp.	NY	(212) 842-5500		Customer - Direct	ZKhan	Yes	Hot	16/08
13	United Oil & Gas, Singapore	Singapore	(650) 450-8810		Customer - Direct	ZKhan	Yes	Hot	16/08
14	United Oil & Gas, UK	UK	+44 191 4956203		Customer - Direct	ZKhan	Yes	Hot	16/08
15	University of Arizona	AZ	(520) 773-9050		Customer - Direct	ZKhan	Yes	Warm	16/08

Updated records

The screenshot shows the Salesforce interface for managing accounts. The top navigation bar includes Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, and More. The main content area displays an account record for 'new employee'. The 'Description' field contains the text 'updated again' and is circled with a red box. Other fields visible include Annual Revenue (\$1,00,000), Billing Address, Shipping Address, Customer Priority, SLA, SLA Expiration Date, SLA Serial Number, Number of Locations, Upsell Opportunity, Active (Yes), Created By (Zahid Khan, 14/10/2023, 6:02 pm), and Last Modified By (Zahid Khan, 14/10/2023, 7:22 pm). Buttons at the top right include Follow, New Contact, New Case, and New Note.

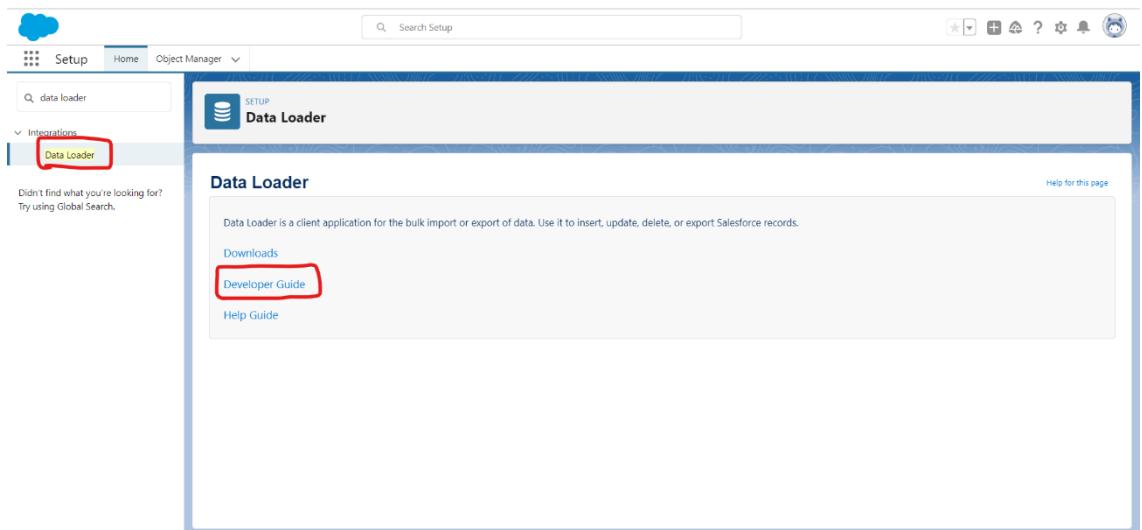
Data loader

- It helps to import data from excel/csv format into salesforce.
- One has to install it in the computer through downloading from internet.
- We can import up to 5,00,000 records at a time.
- Operations that can be done:
 - I. Insert
 - II. Update
 - III. Upsert
 - IV. Delete
 - V. Export
 - VI. Export All (includes deleted records as well).

Steps to download data load and install:

- First of all, go to set up and search for **data loader** in quick find box. And click on it.
- After that we got option download, developer guide and help guide.
- We can direct download zip file of data loader and install it. But the prerequisite of data loader is to jdk 17 or above must be installed in the system.

- So, click on developer guide one new page will open.

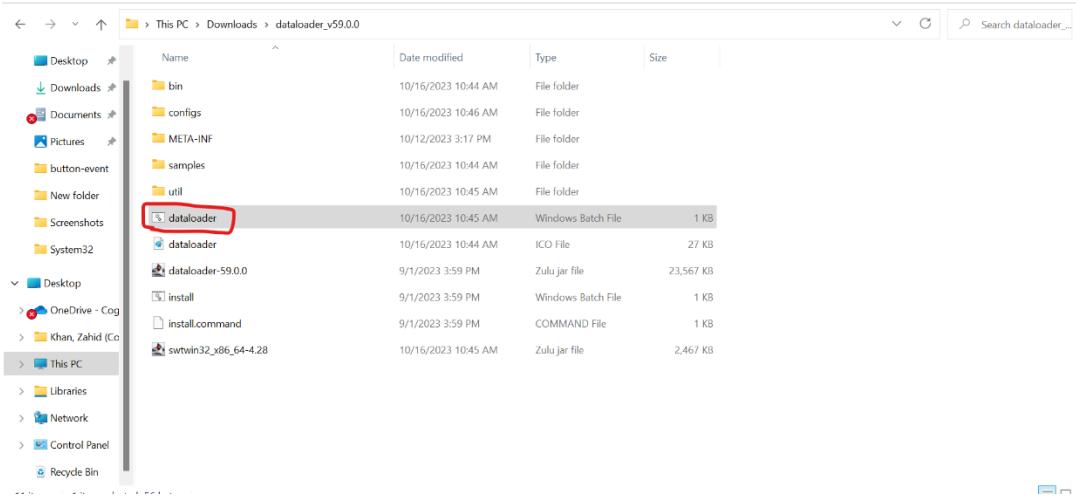


- In new page click on install data loader after that click on download and install data loader.

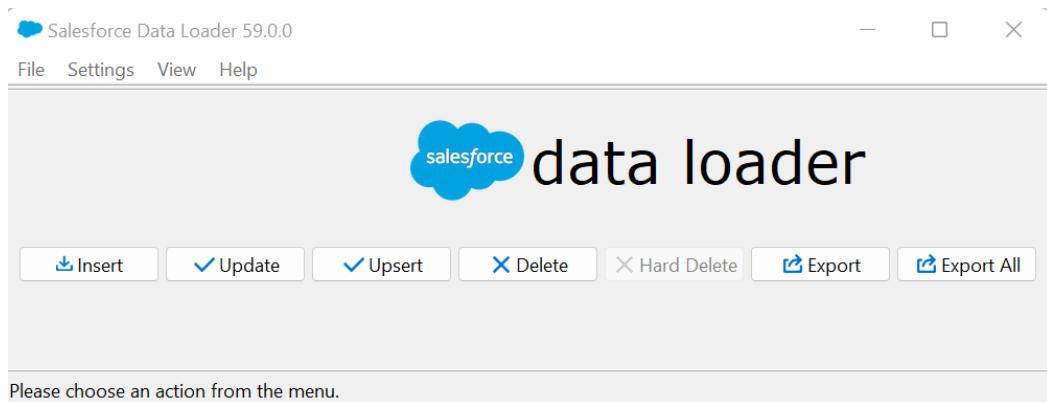
The screenshot shows the 'Data Loader Guide' page on the Salesforce Developers site. The left sidebar has sections like 'About Data Loader', 'When to Use Data Loader', 'Install Data Loader' (with 'Download and Install Data Loader' highlighted by a red box), 'Configure Data Loader', and 'Using Data Loader'. The main content area is titled 'Install Data Loader' and contains instructions: 'Use Data Loader to insert, update, delete, and export Salesforce records.' It notes availability in both Salesforce Classic and Lightning Experience, and for Enterprise, Performance, Unlimited, and Developer editions. It also lists 'Download and Install Data Loader' and 'Considerations for Installing Data Loader'.

- After that follow all steps on the page and install the data loader.

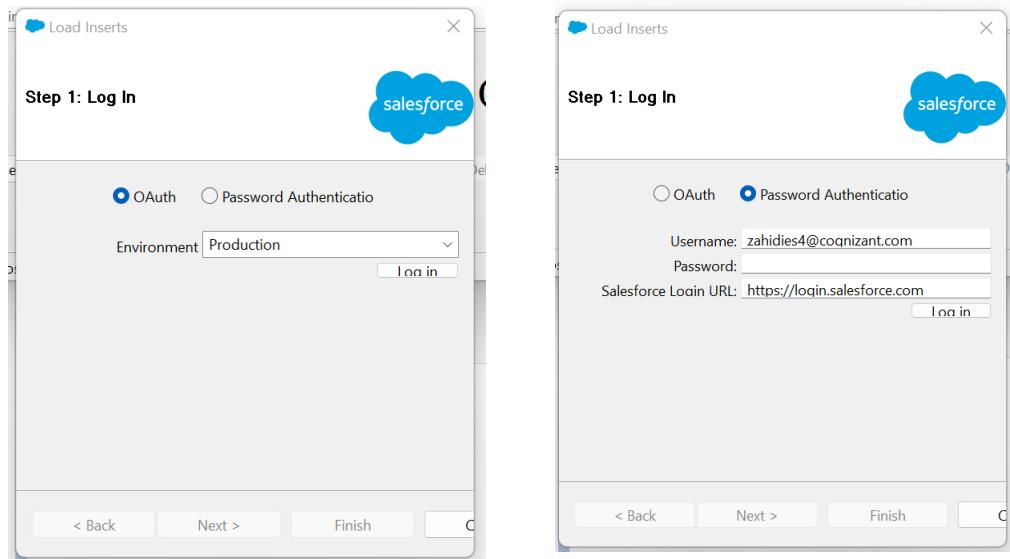
- After installation of data loader, we can get a icon on desktop if not then go to the extracted path of the data loader and click on below file.



- After that we got the below interface of data loader.



- Now click on any option so that the login window will open, and we have to login by entering id and password.
- In OAuth choose production in environment. After that select Password authentication for enter id and password for authentication.



- After successfully login we can use all option as data import wizard.
- In data loader we don't have to copy the id from address bar manually. If we use export option the file is downloaded with id.

Day-14

Approval process

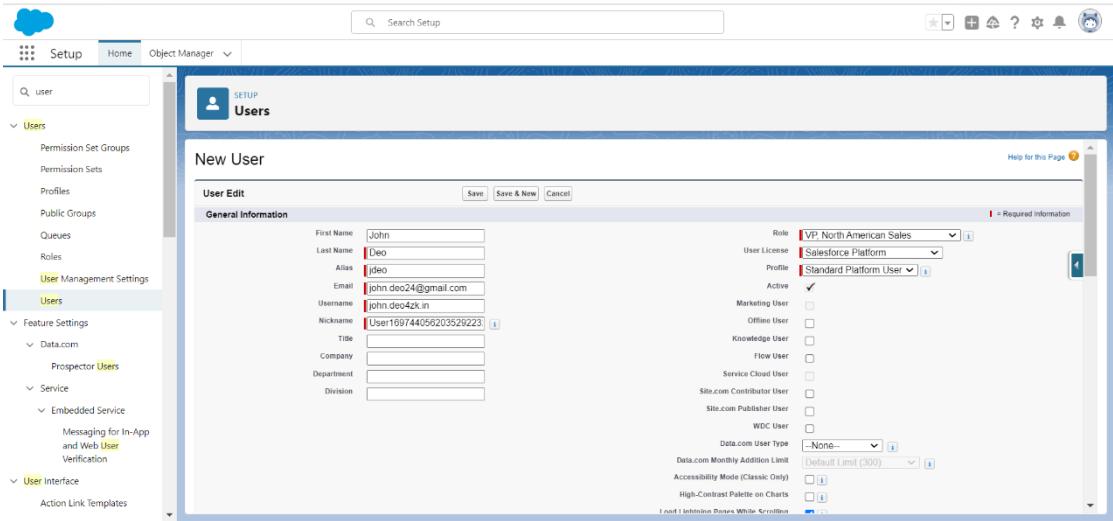
- An approval process is an automated process.
- It is implemented to approve records.
- We can specify the steps those are necessary for approval.
- It allows a step to apply to all records or just records that have certain attributes.
- In approval process we can also define who will be approving at each step.
- Approver can take steps that when records approved, rejected, or recalled.

Steps to create approval process:

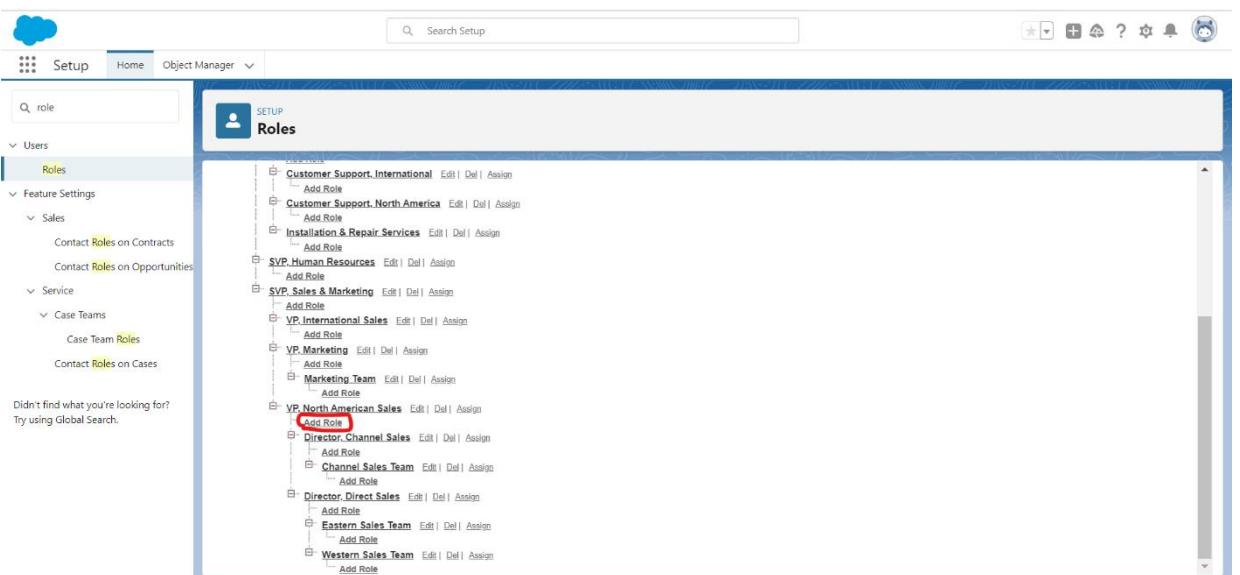
- We take following scenario for creating Approval process.
 - I. If discount is requested for 20% or less, it is automatically approved.
 - II. If a discount is requested for more than 20%, it must be approved by a manager in the sales department for U.S. reps.
 - III. If discount is requested for more than 40%, it must also be approved by VP, north America sales.
- Before creating of approval process, we have to create user for VP and Manager so that they can approved the request.
- For this we have to create 2 profile 1. VP, 2. Manager.
- For creating user go to set and search for User in quick find box. After that click on new user.

The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar is open, showing sections like Setup, Home, Object Manager, and a search bar. Under 'User Management Settings', the 'Users' link is highlighted with a red box. The main content area is titled 'SETUP' and 'Users'. It displays a table of 'All Users' with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. A red box highlights the 'New User' button at the top of the table. The table lists several users, including 'Chatter Expert', 'Khan Zahid', 'User Integration', 'User Security', and 'user_Test'. At the bottom of the table, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

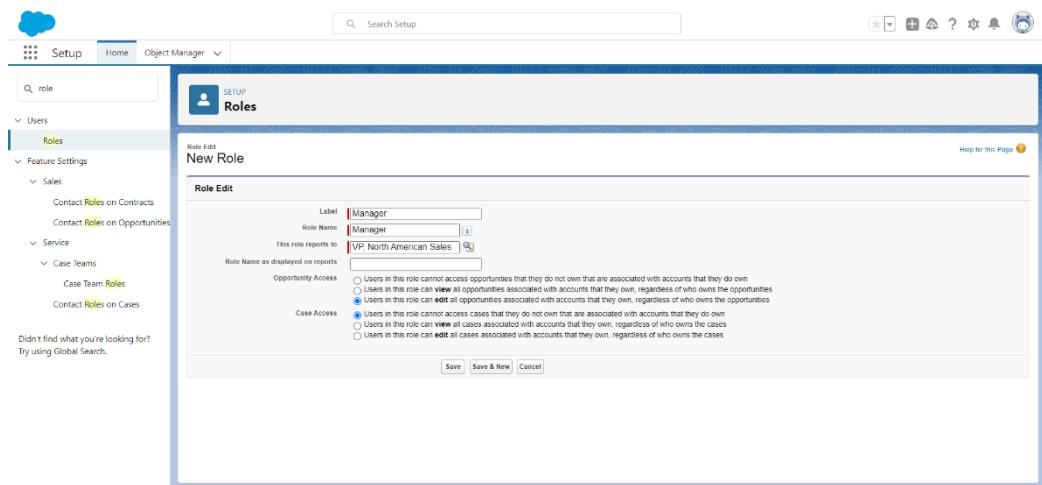
- After that enter all details for VP role and click on save.



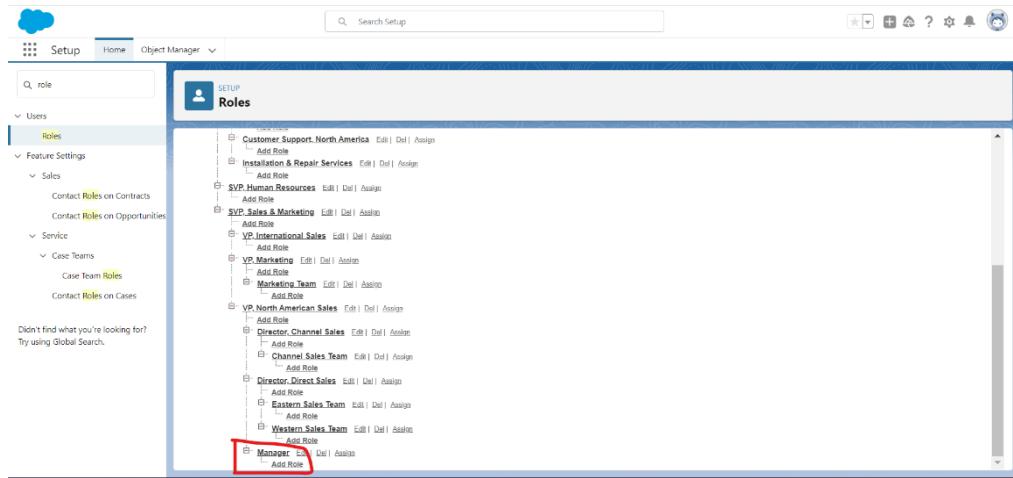
- Now VP profile user is created.
- After that create a role under VP.
- To create role search for **Roles** in quick find and click on it. And click on expand all to show all the hierarchy.
- Now click on add role under VP, north America sales and make manager role.



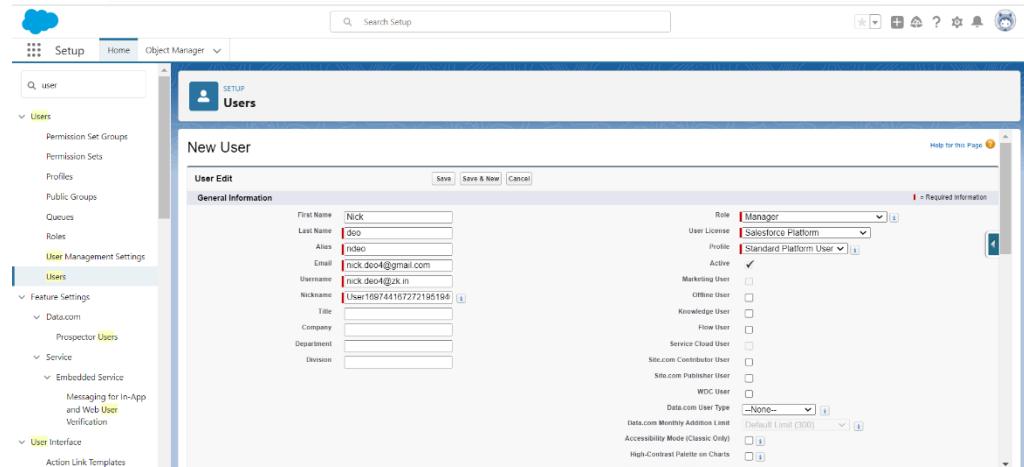
- After that enter the label and role name and click on save.



- This way manager role is created under VP.



- Now we can create manager user under users' section. Before creating manager user we have to create role under VP after that we can create.
- Now, we have to create one more user for manager. Same way creates a user for manager and select role as manager.



- After that we have to make our account (system administrator) under manager like my manager is manager and VP is the manager of my manager. So, when we create any records, it will go to the approval of my manager after that VP.
- To do so again search for Users in quick find box. And click on it.
- After that click on edit beside system administrator profile (Zahid khan).

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main area displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. A red box highlights the 'Edit' link next to the user 'Zahid Khan'. The user details are as follows:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Charter Expert	Charter	charly000000000000000000000000000000@charter.salesforce.com		<input checked="" type="checkbox"/>	Charter Free User
<input type="checkbox"/> Edit Login	Deo, John	Ideo	john.deo@pk.in	VP_NorthAmerican_Sales	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit Login	Deo, Nick	nideo	nick.deo@pk.in	Manager	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit Login	Zahid, Zahid	Zzhan	zahidzz4@conzept.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@005d0000000000000000000000000000@conzept.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	integrationsec@005d0000000000000000000000000000@conzept.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/> Edit Login	User_Test	tuser	zahides4@pk.in		<input checked="" type="checkbox"/>	Demo profile

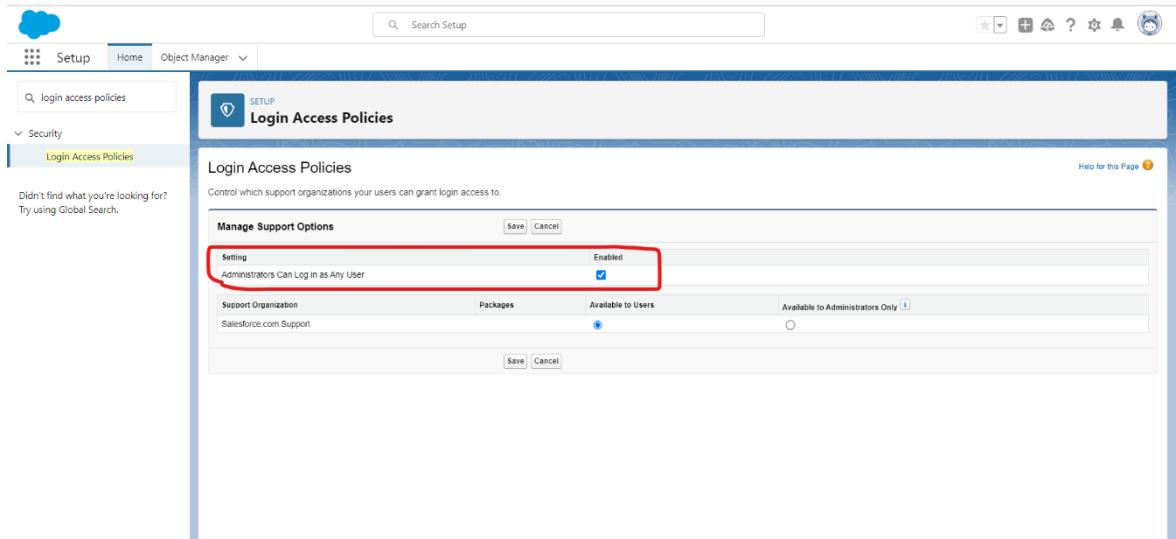
- After that scroll down and select manager field as nick deo. This way my manager is nick deo. And click on save.

The screenshot shows the 'Approver Settings' section of the User edit screen. A red box highlights the 'Manager' field, which is populated with 'Nick deo'. Below the field is a checkbox for 'Receive Approval Request Emails' with the note 'Only if I am an approver'.

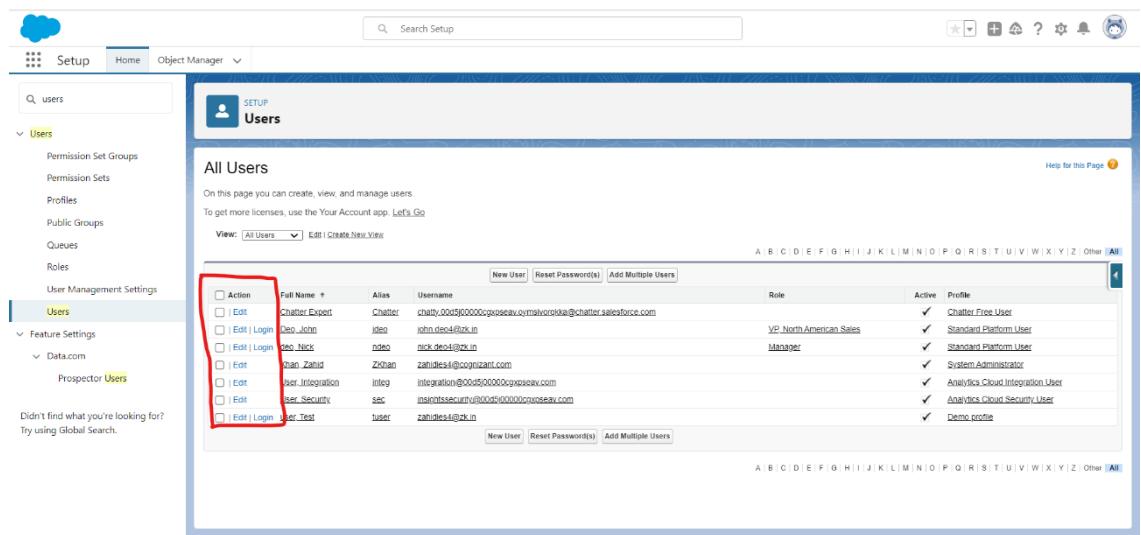
Steps to enable login option in users:

- As we can see that there are no login options beside user under Action section. Only edit option is there. To enable the login option search for **login access policies** in quick find and click on it.

- After that check the box that **administrator can login as any user**. And click on save.



- After that again search for user and check that login option is available.



Steps to enable login without password using user option:

- For log-in to the other user we have to switch the browser and enter the username and password again and again.
- We can stop this through setting session.
- For this search for **session settings** in quick find search box. And click on it.
- After that go to session settings and uncheck the box **Force login after Login-as-user**.
- Click on save.

The screenshot shows the Salesforce Setup page. In the left sidebar, under the 'Security' section, the 'Session Settings' link is highlighted with a red box. The main content area is titled 'Session Settings' and contains sections for 'Session Timeout', 'Session Settings', and 'Extended use of IE11 with Lightning Experience'. The 'Session Settings' section includes options like 'Lock sessions to the domain in which they were first used' (which is checked) and 'Force logout after Login-As-User' (which is also checked). A note at the bottom states: "AS OF DECEMBER 31, THE EXTENDED PERIOD HAS ENDED, AND USE OF INTERNET EXPLORER 11 (IE 11) WITH LIGHTNING EXPERIENCE IS NO LONGER SUPPORTED. ISSUES WITH PERFORMANCE OR FUNCTIONALITY THAT AFFECT ONLY IE 11 WILL NOT BE FIXED. PLEASE SWITCH TO A SUPPORTED BROWSER."

create approval process for opportunity:

- All set-up in done for approval process. Now we are going to make approval process for opportunity object with discount field as mentioned in 1st page.
- Go to the opportunity object and click on field & relationship and create new field.
- After that click on new and choose data type as percent.

The screenshot shows the Salesforce Object Manager for the 'Opportunity' object. The 'Fields & Relationships' tab is selected in the left sidebar. On the right, a list of field types is shown, with 'Percent' selected. A detailed description of the 'Percent' field is provided, stating: "Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number." At the bottom right of the screen, there are 'Next' and 'Cancel' buttons.

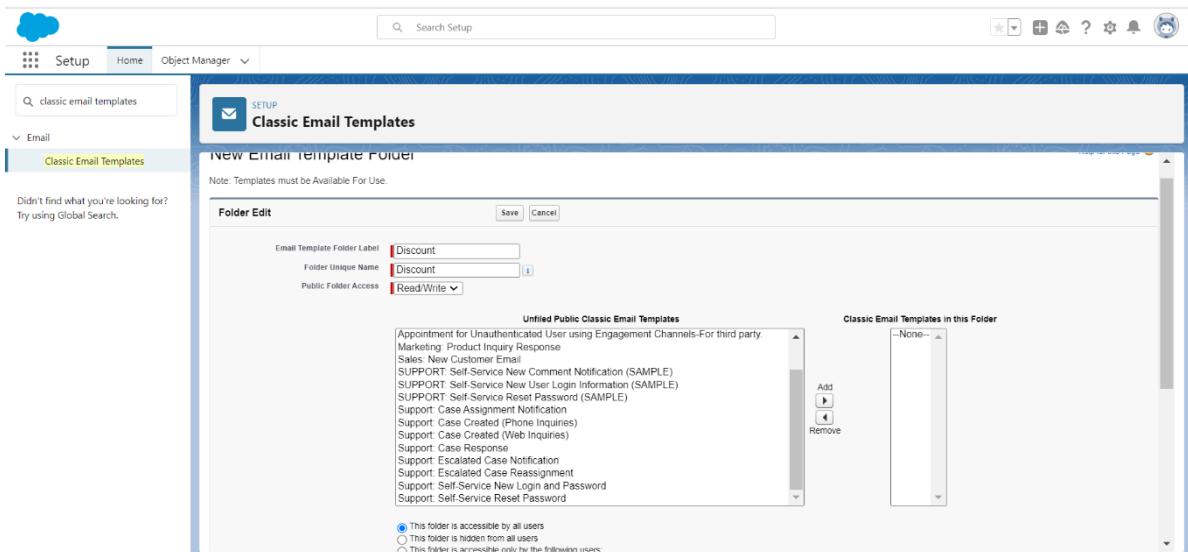
- After that click on next. Enter label name (discount percentage) label is 2 and decimal places is also 2.
- Click on next.
- After that check the visible box so that its visible to all and also check the read only box only uncheck the standard user and system administrator box of read only.

The screenshot shows the Salesforce Object Manager interface. On the left, there's a sidebar with a 'SETUP' icon and a 'Object Manager' dropdown. The main area displays a table of user profiles. A vertical checkbox column is present on the right side of the table. At the bottom of the page, there's a note: 'When finished, click Save.' and a row of buttons: 'Previous', 'Save', and 'Cancel'.

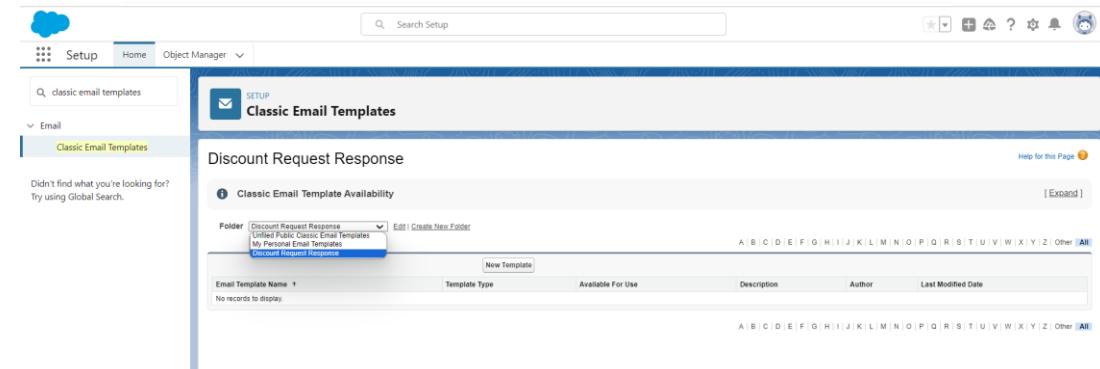
- click on next and save.
- Same way creates one more field and choose data type as picklist (approval process). And all option should be same as discount percentage.
- Now both field is created.
- Next step we have to **create a folder** and **email templates**.
- For this go to home and search for classic email templates. And click on it. After that click on create new folder.

The screenshot shows the Salesforce Classic Email Templates page. The URL in the address bar is 'classic email templates'. The page title is 'Classic Email Templates'. In the top left, there's a 'Email' section with a 'Classic Email Templates' link. The main content area is titled 'Unfiled Public Classic Email Templates'. At the top right, there's a 'Create New Folder' button. The page lists various email templates with columns for Action, Email Template Name, Template Type, Available For Use, Description, Author, and Last Modified Date. A red box highlights the 'Create New Folder' button.

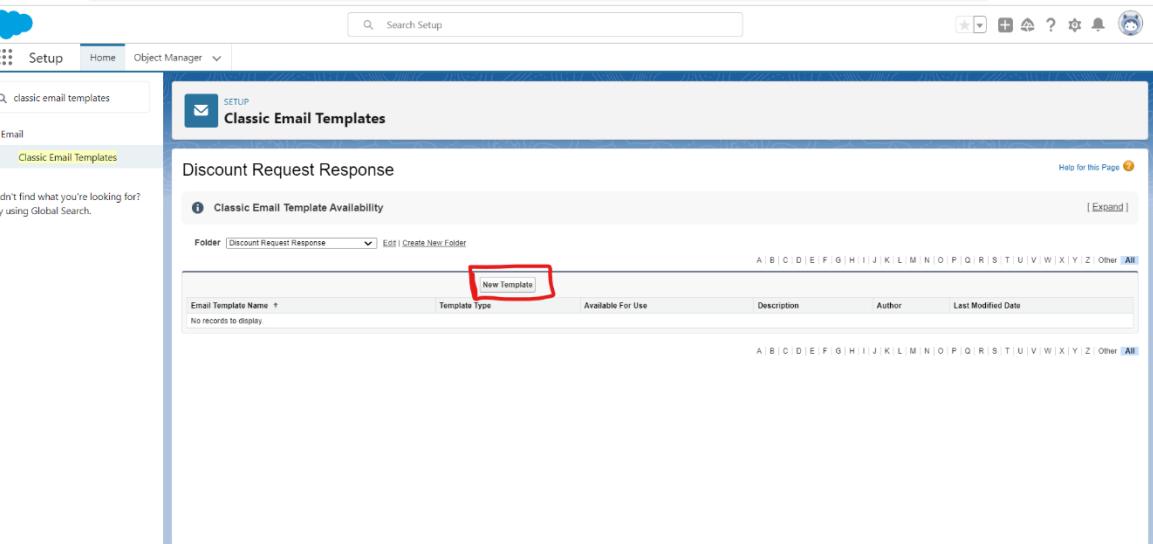
- After that enter the email templates folder label (i.e., discount request response) and folder unique name. and select public folder access is read/write. And click on save.



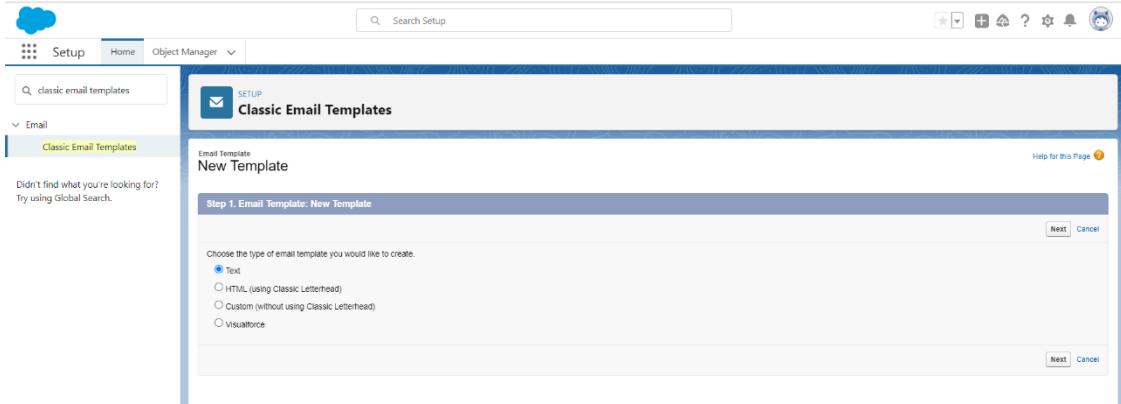
- now new folder is created.
- After that select folder which we created from drop down.



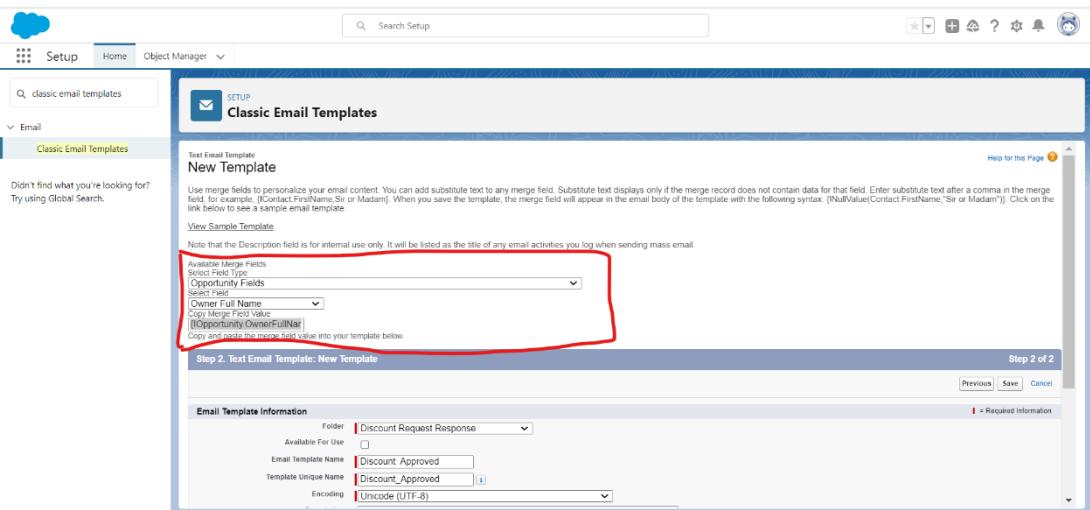
- After that we have to add templates. For this click on Add templates.



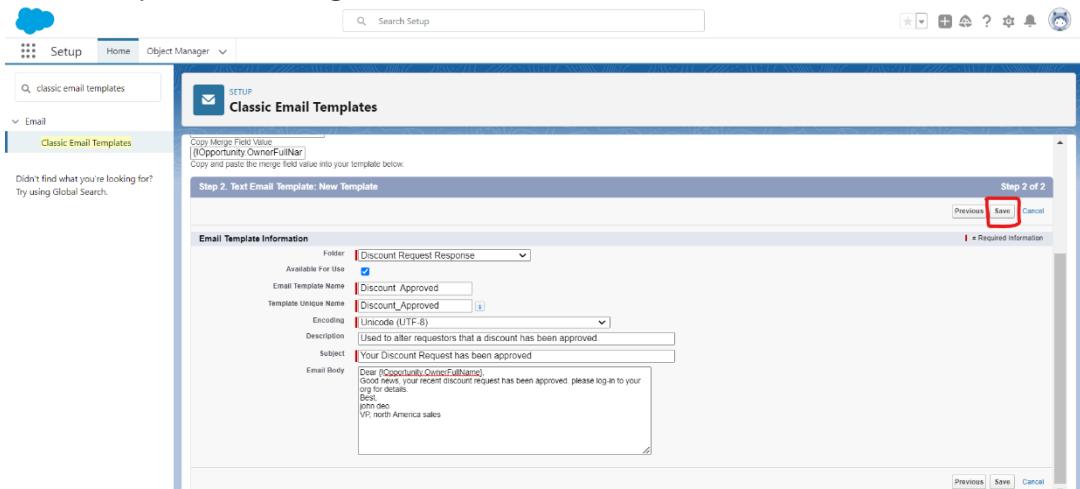
- After that in step 1 choose text. And click on next.



- After that we have to enter **email templates name**, email templates folder already entered, **template unique name**, check the box **available for use**, **description**, **subject** and **email body**.
- We have to enter the merge field of the owner's name from above of the email templates. Just scroll up and select field type as opportunity field, select field as owner full name and copy the merge field value and paste inside body.



- After that paste the merge field and save.



- Now again search for classic email templates. We will see that discount approved templates created.

Action	Email Template Name	Template Type	Available For Use	Description	Author	Last Modified Date
Edit Del	Discount Approved	Text	✓	Used to after requestors that a discount has been approved.	Zohan	16/10/2023

- Now in same way we have to create one more template for rejected approval inside same folder (discount response folder).
- Both email templates are created.

Action	Email Template Name	Template Type	Available For Use	Description	Author	Last Modified Date
Edit Del	DiscountApproved	Text	✓	Used to after requestors that a discount has been approved.	Zohan	16/10/2023
Edit Del	Discount_rejected	Text	✓	Used to after requestors that a discount has been rejected.	Zohan	16/10/2023

Approval process:

- Now next process is to set up approval process.
- For this search for Approval process in quick find box and click on it. And select manage approval process for opportunity object. Because we are taking example of opportunity object.

Manage Approval Processes For: Opportunity

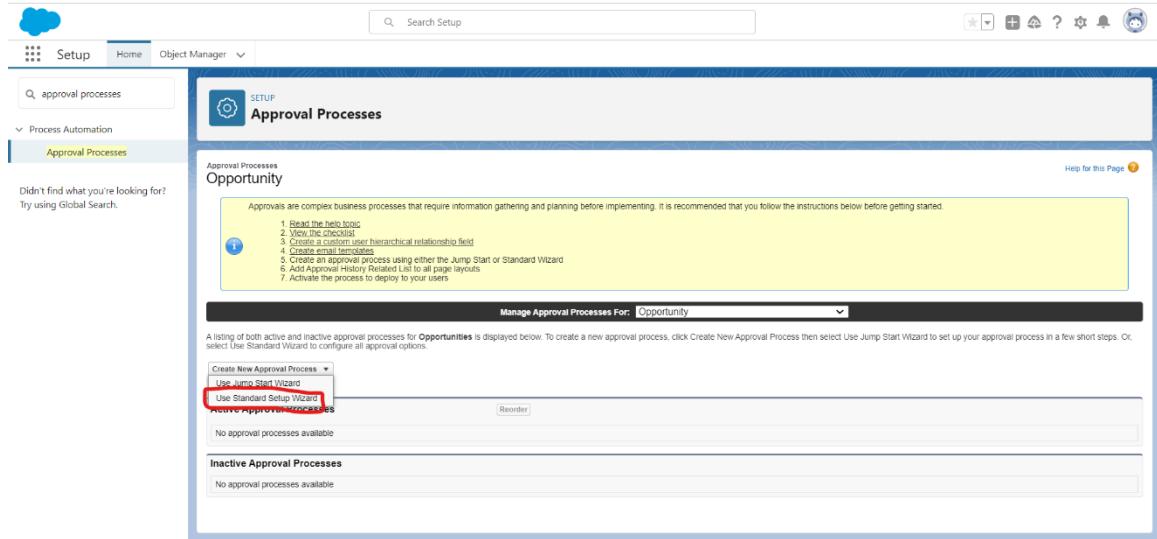
Active Approval Processes (Reorder)

No approval processes available

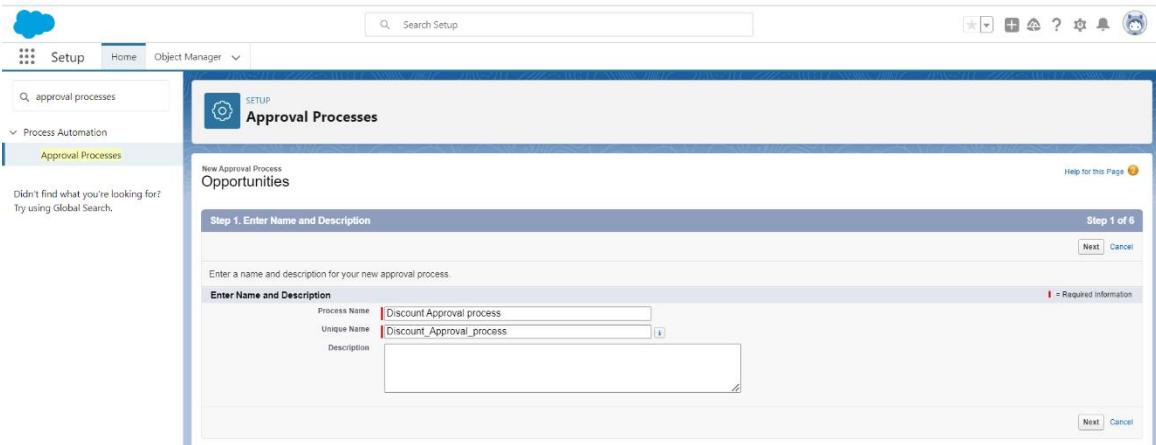
Inactive Approval Processes (Reorder)

No approval processes available

- After that click on the new approval process drop down and select use standard setup wizard.



- After that enter process name, unique name, and description.
- After that click on next.



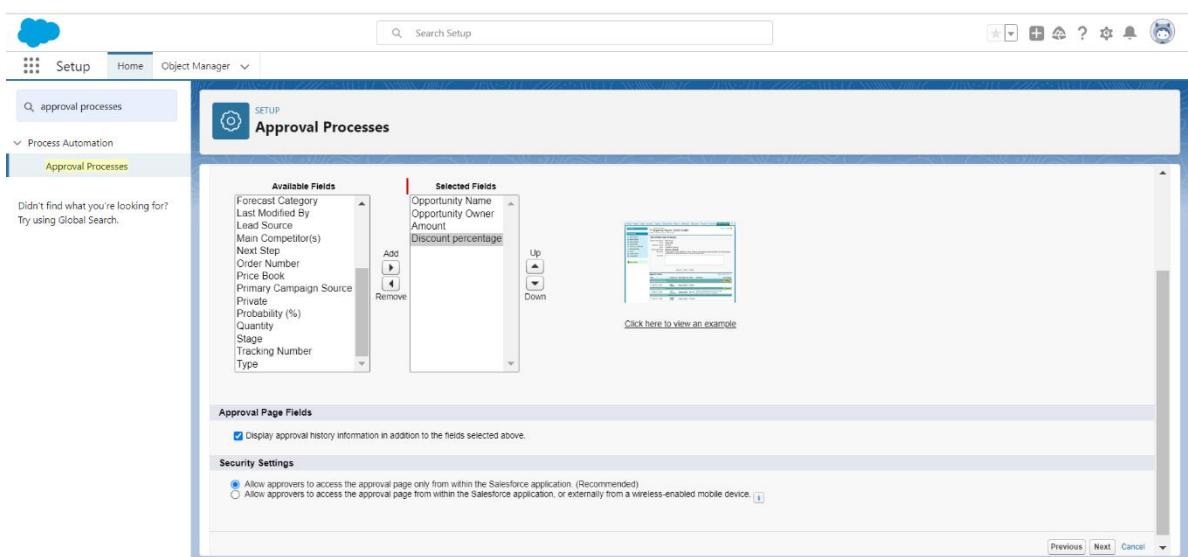
- After that we have to specify entry criteria like when this approval process will start. For this we have 2 options 1st formula evaluates to true, 2nd criteria are met.
- We are selecting 2nd option that criteria are met.
- After that select the field as discount percentage (which we created) operator is greater than and value is zero. Its means when discount percentage is greater than zero this approval process will start.
- We can add upto five criteria in this page. Based on the criteria we can also add logic.
- After that click on next.

- in next step we got 2 options 1st for **select field user for automated approval routing** and 2nd is **Record editability properties**.
 - In 1st step we have to select Manager in **next automated approved determined by**. its means when discount percentage field is created that record will automate route to the manager of the system administrator which we edited (nick deo). And check the box use approver field of opportunity owner.
 - In 2nd step we have to 2 options **only system administrator can edit records during approval process or administrator or the currently assigned approver can edit records during approval process**. Here, we are selecting 1st option.
- After that click on next.

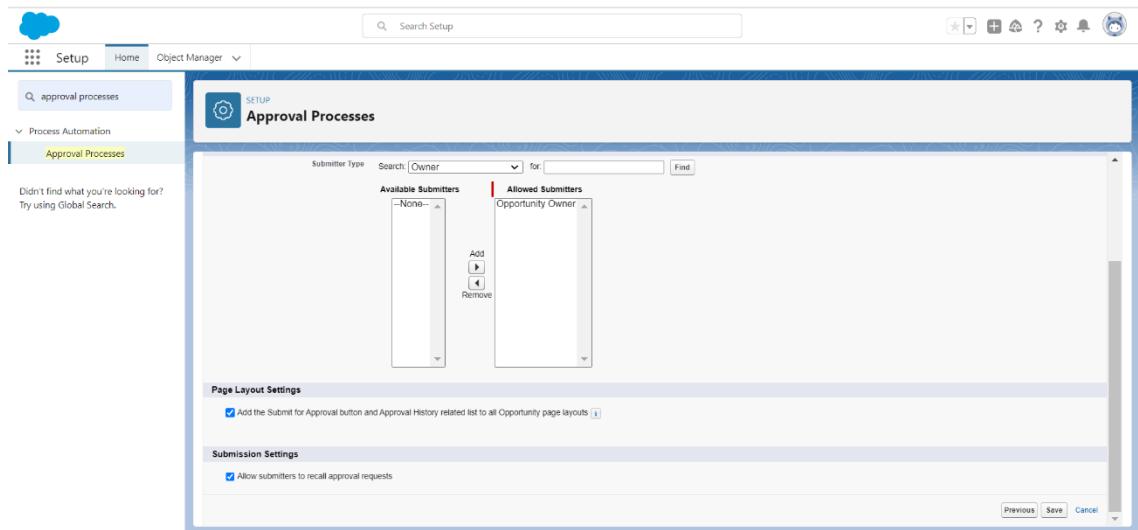
next step we have to select assignment email templates. currently we don't have any templates, so we leave blank this field. Assignment email templates means that when

any approval request assign to approver then this mail will send to approver in notifications.

- After that click on next.
- Next steps, we have to Select Fields to Display on Approval Page Layout. Here, we are selecting Amount and discount percentage. Select these fields and click add button to add.
- After that check the box to the approval history to the field.
- Last option is that select that whether **approver access the approval page from salesforce applications only or approver access the approval page from salesforce applications or mobile devices**. Here, we are selecting 1st options.
- After that click on next.



- In next step, we have to select the initial submitter. Opportunity owner is already selected.
- Next, in page layout setting select **Add the Submit for Approval button and Approval History related list to all Opportunity page layouts**. So, that one approval button will be add in opportunity page.
- In submission setting check the box if we want to give access to the submitter that they can recall records.
- After that click on save.



- After that we will find 3 options.

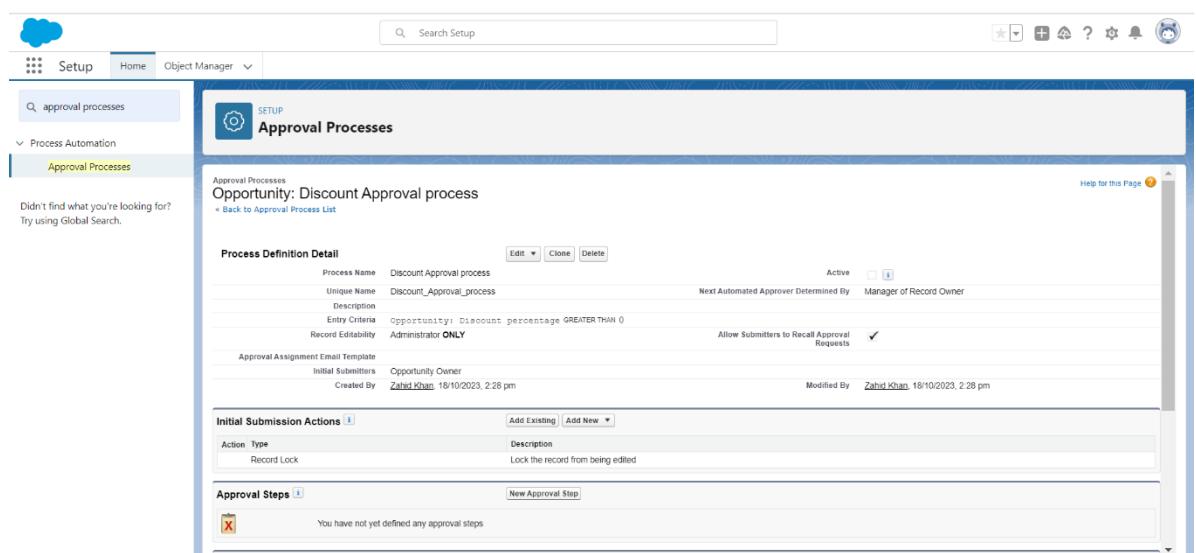
You have just created an approval process. However, you cannot activate this process until you define at least one approval step.

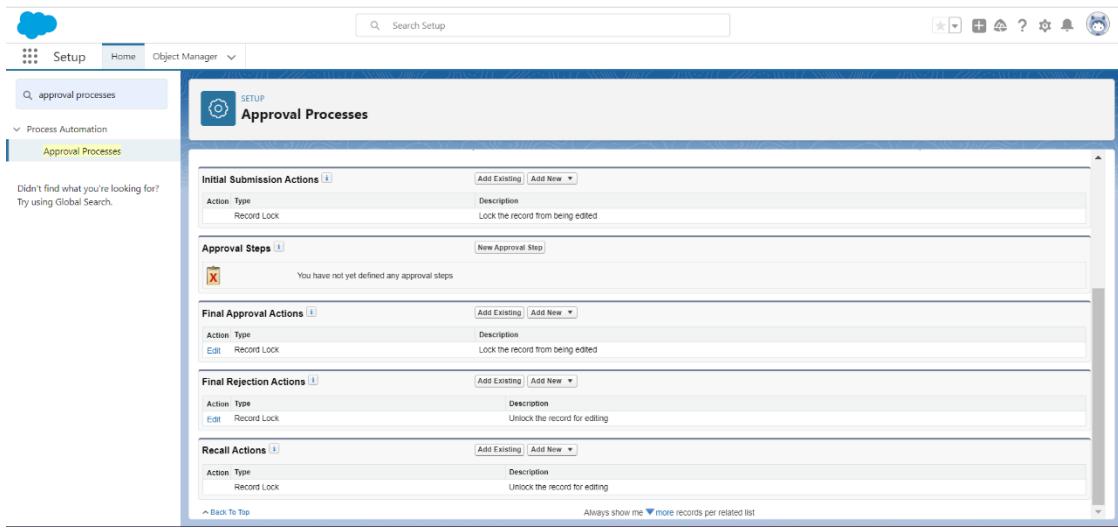
Would you like to do that now?

- Yes, I'd like to create an approval step now.
 - I'll do this later. Take me to the approval detail page to review what I've just created.
 - I'll do this later. Take me back to the listing of all approval processes for this object.
- Select 2nd option because we want to review and what we created and click on Go.
 - After that all the options what we selected during making of approval process will be visible. Currently it is not active because we have to configure more things.

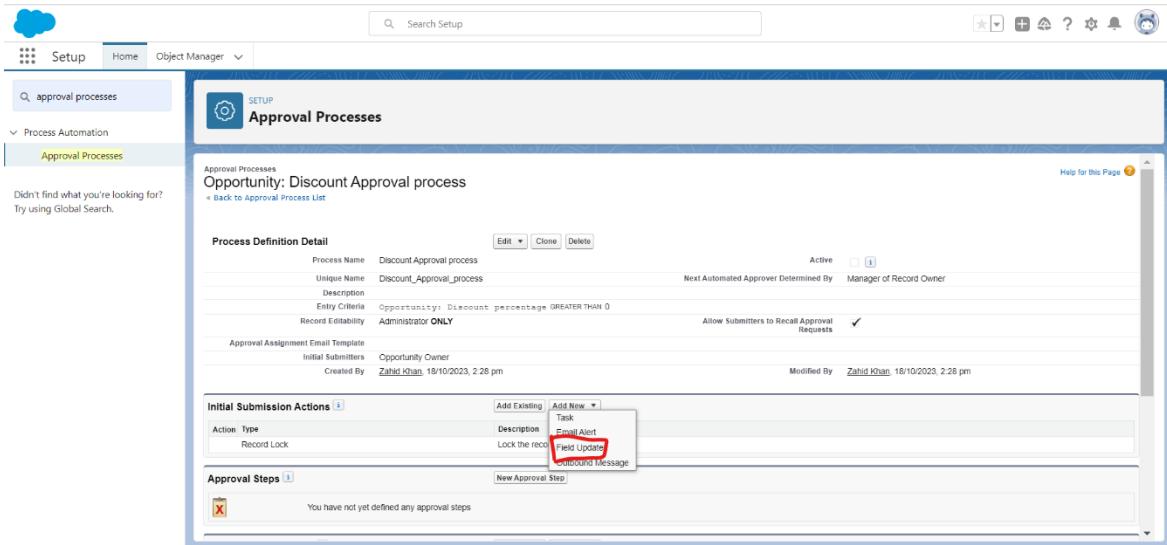
Along with that we got below options as well.

- Initial submission Actions
- Approval steps
- Final approval actions
- Final rejection actions
- Recall actions





- Now, first we have to enter **initial submission actions**. This record is locked so that nobody can edit these records.
- Click on Add new button in which we got 4 options. Task, email alert, field update and outbound messages. Here we are selecting field updates. Because we are made a picklist field and when approval process will start the initial option will be pending from the picklist.



- After that enter the name, unique name, description and file update.
- Select the field update is approval process field. And in specify new field value select pending
- After that click on save.

- now initial submission is done whenever approval process starts the value will be show pending.
- Now, in second option we have to specify **approval steps**. For this click on **new approval steps** button under approval steps options.

- Enter the name, unique name, description, and steps. And click on next.

- After that we have to specify step criteria. Click on 2nd option and enter the criteria that if discount percentage is greater than 20% it will go for manager approval.
- click on next.

The screenshot shows the Salesforce Setup interface for creating an Approval Process. The left sidebar shows 'approval processes' under 'Process Automation'. The main area is titled 'Approval Processes' and 'New Approval Step'. The current step is 'Step 2. Specify Step Criteria'. The table specifies a condition: 'Enter this step if the following criteria are met' (radio button selected). The condition is 'Opportunity Discount percentage > 20'. The table structure is as follows:

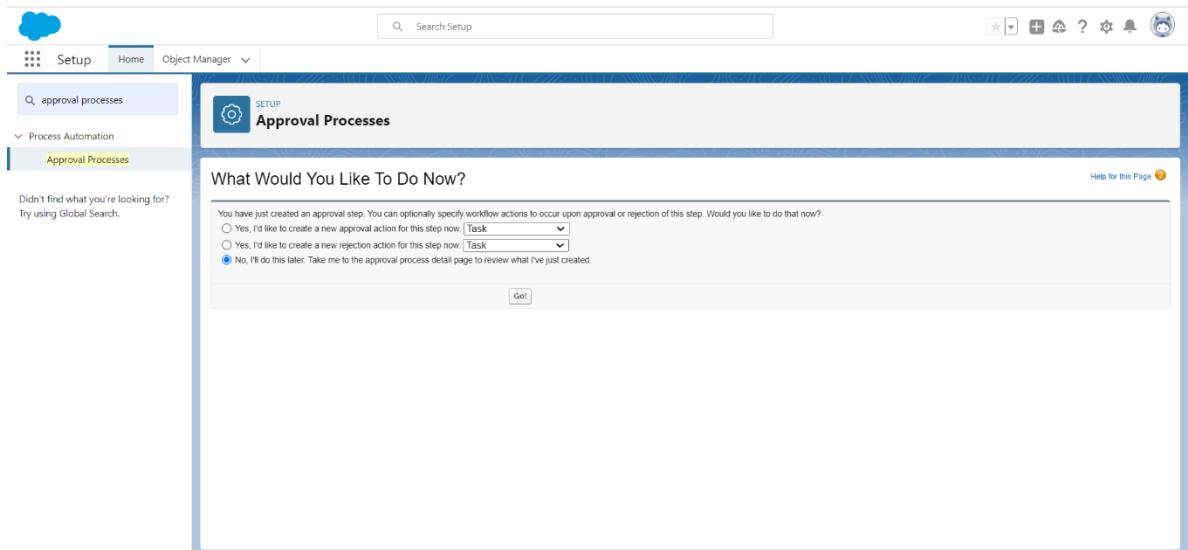
Field	Operator	Value	Operator	Value
Opportunity Discount percentage	greater than	20	AND	
-None--	-None--		AND	
-None--	-None--		AND	
-None--	-None--		AND	
-None--	-None--			

- After that we have to select the approver. In which we get 3 options.
 - I. 1st let submitter choose the approver manually.
 - II. 2nd automatically assign using the user field selected earlier like we select manager so by default it selects the manager.
 - III. 3rd automatically assigns to approver. When we select this option so that list of users will open, and we can select anyone whom with we want to assign the request.
- We are selecting 2nd option. And click on save.

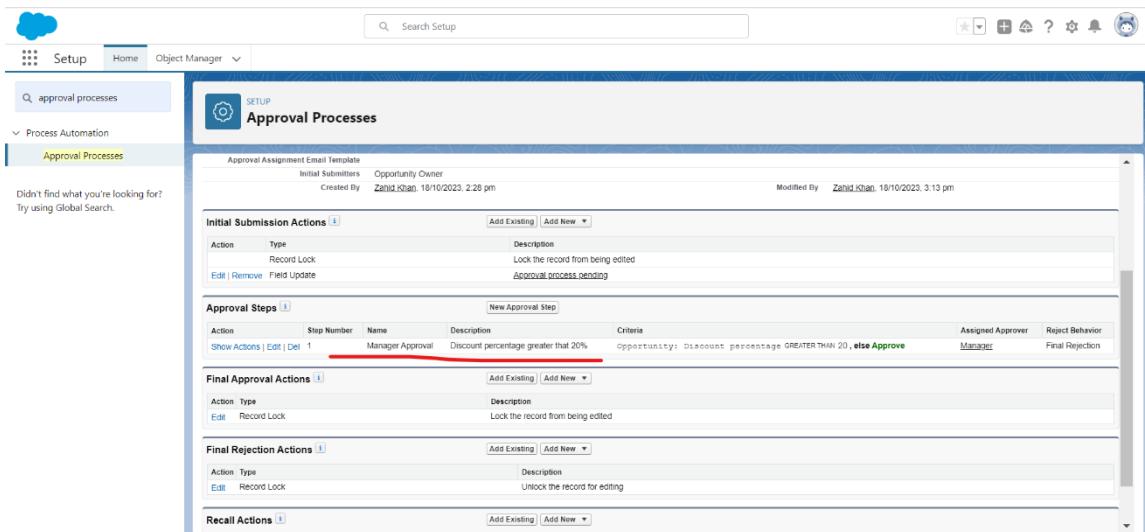
The screenshot shows the 'Approval Processes' setup page at Step 3: Select Assigned Approver. The table lists three options for selecting an approver:

Select Approver
<input type="radio"/> Let the submitter choose the approver manually
<input checked="" type="radio"/> Automatically assign using the user field selected earlier. (Manager)
<input type="radio"/> Automatically assign to approver(s).
<input type="checkbox"/> The approver's delegate may also approve this request. <small>(Help)</small>

- After that we got 3 options just check the last options **No, I'll do this later. Take me to the approval process detail page to review what I've just created.** And click on go.

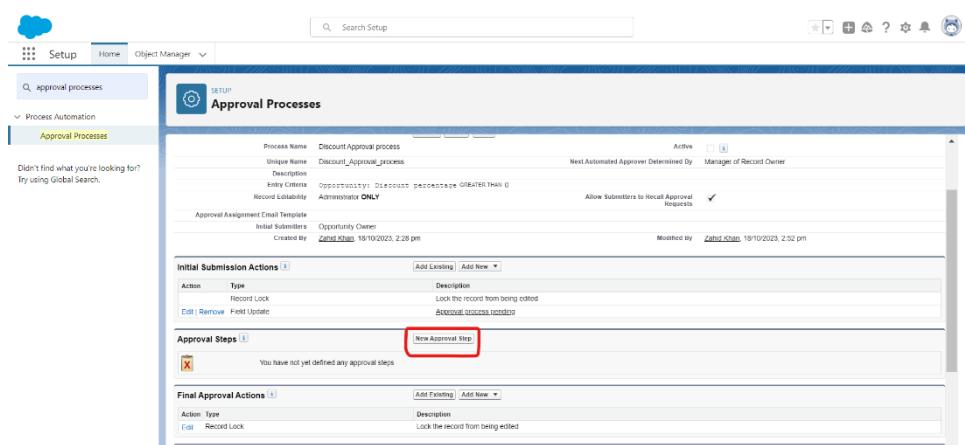


- This way 1st steps of the approval process are created. That is of the discount is



greater than 20% so its go for manager approval. If less the 20% its approved automatically.

- Now we have to make 2nd steps for VP approval if discount greater than 40%.
- Again, click on new approval steps button.



- Enter name **VP approval process**, unique name, description, and step number is 2 because its 2nd steps. After that click on next.

New Approval Step

Step 1. Enter Name and Description

Enter a name, description, and step number for your new approval step.

Approval Process Name	Discount Approval process
Name	VP approval
Unique Name	VP_approval
Description	Discount greater than 40%
Step Number	2

Previous Approval Step Information

Step Number: 1
Name: Manager Approval
Criteria: Opportunity: Discount percentage GREATER THAN 20
Assign To: Manager

- After that enter the criteria that is discount percentage should be greater than 40%.
- After that click on next.

Specify Step Criteria

All records should enter this step.

Enter this step if the following criteria are met:

Field	Operator	Value
Opportunity: Discount percentage	greater than	40
None	None	

AND

AND

AND

- After that we have to select approver. This time we have to select the 3rd option that is automatically assign to approver. Because we want to assign it to the VP. Select the user and click on search icon so that we can see available user list. And select john deo which role is VP. If we want to add more than 1 approver for 1 request, we will do by clicking on add row.
- After that in Rejection behavior select 1st option that is Perform all rejection actions for this step AND all final rejection actions. (Final Rejection). Its mean if this approver reject the request so that the I won't go back to previous approver it will be final rejection.
- After that click on next.

Previous Approval Step Information

Step Number: 1
Name: Manager Approval
Criteria: Opportunity: Discount percentage GREATER THAN 20
Assign To: Manager

Select Approver

- Let the submitter choose the approver manually.
- Automatically assign using the user field selected earlier. (Manager)
- Automatically assign to approvers

When multiple approvers are selected:

- Approve or reject based on the FIRST response
- Require UNANIMOUS approval from all selected approvers

The approver's delegate may also approve this request.

Reject Behavior

What should happen if the approver rejects this request?

- Perform all rejection actions for this step AND all final rejection actions. (Final Rejection)
- Perform ONLY the rejection actions for this step and send the approval request back to the most recent approver. (Go Back 1 Step)

Previous Save Cancel

- After that again select 3rd option that is **No, I'll do this later. Take me to the approval process detail page to review what I've just created.** and click on Go.
- Now 2 steps are created.

Approval Assignment Email Template

Initial Submitters: Opportunity Owner
Created By: Zahid Khan 18/10/2023, 2:28 pm
Modified By: Zahid Khan 18/10/2023, 3:30 pm

Initial Submission Actions

Action	Type	Description
Record Lock		Lock the record from being edited
Field Update		Approval process: DEC009

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit Del	1	Manager Approval	Discount percentage greater than 20%	Opportunity: Discount percentage GREATER THAN 20, else Approve	Manager	Final Rejection
Show Actions Edit Del	2	VP approval	Discount greater than 40%	Opportunity: Discount percentage GREATER THAN 40	User: John Doe	Final Rejection

Final Approval Actions

Action	Type	Description
Record Lock		Lock the record from being edited

Final Rejection Actions

Action	Type	Description
Record Lock		Unlock the record for editing

- After that click on Active so, that this approval process will activate.

Process Name: Discount Approval process
Unique Name: Discount_Approval_process
Description: Opportunity: Discount percentage: GREATER THAN 0
Entry Criteria: Opportunity: Discount percentage: GREATER THAN 0
Record Editability: Administrator ONLY
Allow Submitters to Recal Approval Requests:

Approval Assignment Email Template

Initial Submitters: Opportunity Owner
Created by: Zahid Khan 18/10/2023, 2:28 pm
Modified by: Zahid Khan 18/10/2023, 3:30 pm

Initial Submission Actions

Action	Type	Description
Record Lock		Lock the record from being edited
Field Update		Approval process: DEC009

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit Del	1	Manager Approval	Discount percentage greater than 20%	Opportunity: Discount percentage: GREATER THAN 20, else Approve	Manager	Final Rejection

- After activating the process, the Add approval steps is invisible. For add new approval steps we have to deactivate the process after that we can add.
- In 3rd steps we have to create final approval actions. For this we have to select field update **approval status** and select **approved** and email alert which is we created in classic email templates.
- Now, click on Add new button under **final approval actions**. And select Field update.

The screenshot shows the 'Approval Processes' setup page. Under 'Final Approval Actions', there are two entries: 'Record Lock' and 'Field Update'. A dropdown menu is open over the 'Field Update' entry, listing 'Task', 'Email Alert', 'Unlock', and 'Field Update'. The 'Field Update' option is highlighted with a red box.

- After that enter the name, unique name, description, and field to update. In field to update we have to select Approval status. And specify new field value select approved because it's a final approval action. After that click on save.

The screenshot shows the 'Field Updates' setup page. Under 'Approval Status to Approved', the 'Field Update Edit' form is displayed. In the 'Object' section, 'Opportunity' is selected. In the 'Field to Update' section, 'Approval status' is selected from the dropdown. In the 'Specify New Field Value' section, 'Approved' is selected from the picklist options.

- After that again click on Add new button and this time select Email alert.

The screenshot shows the 'Approval Processes' setup screen. It lists two approval steps: 'Manager Approval' (Step Number 1) and 'VP approval' (Step Number 2). Each step has associated actions like 'Record Lock' and 'Field Update'. The 'Manager Approval' step has a criterion: 'Discount percentage greater than 20%' and 'Opportunity: Discount percentage GREATER THAN 20, else Approve'. The 'VP approval' step has a criterion: 'Discount greater than 40%' and 'Opportunity: Discount percentage GREATER THAN 40'. The 'Assigned Approver' for both is 'Manager' and the 'Reject Behavior' is 'Final Rejection'. A modal window titled 'Final Approval Actions' is open, showing 'Email Alert' as the selected action type.

- After that enter description, unique name, email templates for approved which we created in classic email templates.
- Click on search icon in email templates so that all templates will open. One pop-up will open select the folder of the email what we created. after that select discount approved email.

The screenshot shows the 'Email Templates' page in Salesforce. A search bar at the top is set to 'Classic' and contains the query 'Discount Request Response'. Below the search bar, a list of templates is shown, with 'Discount Request Response' highlighted. At the bottom of the page, there is a section titled 'Recently Viewed Email Templates' containing a table with two rows:

Name	Description	Template Type
Discount Approved	Used to alter requestors that a discount has been...	Text
Discount rejected	Used to alter requestors that a discount has been...	Text

- After that select owner in receipt type and add the opportunity owner. Because owner is one who create the records.
- Now click on save.
- Now email alert and field update is created.

The screenshot shows the Salesforce Setup interface with the 'Approval Processes' page selected. The 'Final Approval Actions' section is highlighted with a red box. Inside this section, there is a table with three rows: 'Record Lock' (Description: Lock the record from being edited), 'Email Alert' (Description: Discount approved), and 'Field Update' (Description: Approval Status to Approve). The 'Field Update' row is circled in red.

- In 4th steps we have to make **final rejections actions**.
- For this we have to select field update **rejected status** and select **rejects** and email alert which is we created in classic email templates.
- Now, click on Add new button under **final rejection actions**. And select Field update.

The screenshot shows the Salesforce Setup interface with the 'Approval Processes' page selected. The 'Final Rejection Actions' section is highlighted with a red box. A context menu is open over the 'Add New' button, showing options like 'Task', 'Email Alert', 'Field Update', and 'Outbound Message'. The 'Field Update' option is circled in red.

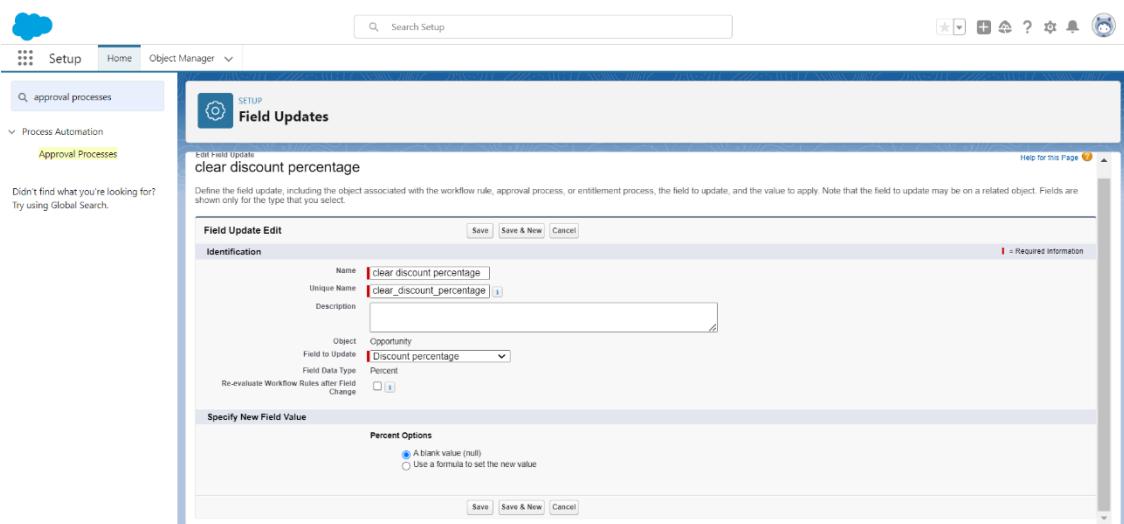
- After that enter the name, unique name, description, and field to update. In field to update we have to select Approval status. And specify new field value select rejected because it's a final rejection action. After that click on save.

- After that again click on Add new button and this time select Email alert.

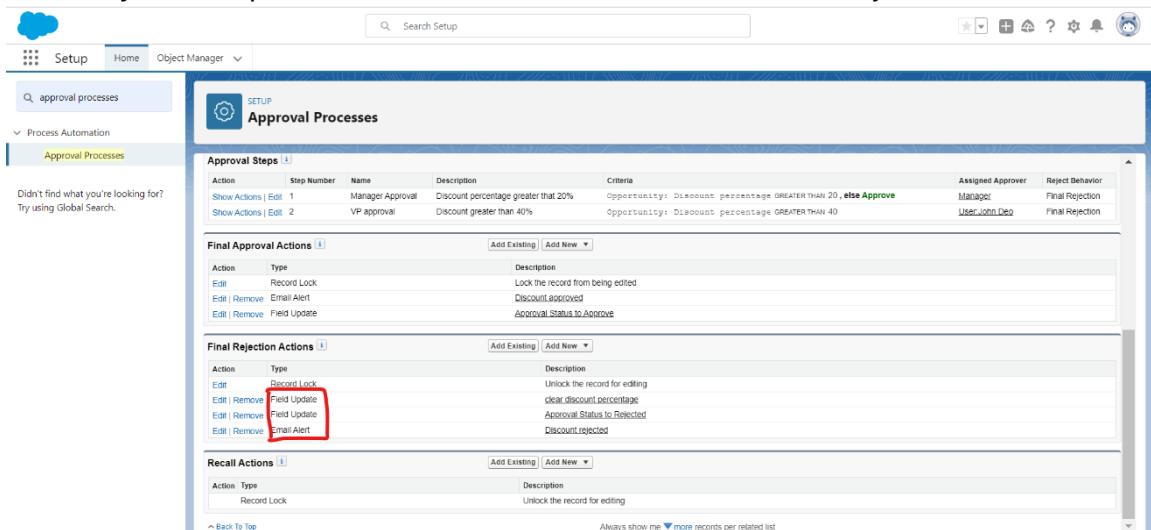
- After that enter description, unique name, email templates for rejected which we created in classic email templates.
- Click on search icon in email templates so that all templates will open. One pop-up will open select the folder of the email what we created. after that select discount rejected email.

Name	Description	Template Type
Discount Approved	Used to alter requestors that a discount has been...	Text
Discount rejected	Used to alter requestors that a discount has been...	Text

- After that select owner in receipt type and add the opportunity owner. Because owner is one who create the records.
- Now click on save.
- One more field update needs to be created in final rejection option which blank the discount value if it rejected.
- Again, click on add new button and click on field update.
- In field to update select discount percentage. And in specify new face value click on **A blank value(null)**. Its means when discount is rejected so discount value will be null.
- Now click on save.



- This way 2 field update and one email alert is created in final rejection actions.



- Now all steps for approval process are completed. It's time to test the results.
- Just go to the front-end of sales app and click on opportunities tab.
- Create one record and enter discount percentage as 10% (less than 20%).

- After that open that created reports. And click on arrow at left side of the screen and click on submit for approval. And enter the comments and click on submit.
- In records we can see the history and status id approved because its less the

The screenshot shows the Salesforce Opportunities page for record oppr 101. The 'Discount percentage' field is highlighted with a red box and contains '10.00%'. The 'Approval status' field is also highlighted with a red box and contains 'Approved'. The right sidebar displays the Stage History, which includes the following details:

Stage:	Prospecting
Amount:	\$2,00,000.00
Probability (%):	10%
Expected Revenue:	\$20,000.00
Close Date:	27/10/2023
Last Modified By:	Zahid Khan
Last Modified:	18/10/2023, 4:23 pm

20%.

- Now create one new record and enter discount percentage 25% (i.e., greater than 20%). And click on submit for approval. This time its showing pending because manager approval needed.

The screenshot shows the Salesforce Opportunities page for record oppr 102. The 'Discount percentage' field is highlighted with a red box and contains '25.00%'. The 'Approval status' field is also highlighted with a red box and contains 'Pending'. The right sidebar displays the Stage History, which includes the following details:

Stage:	Prospecting
Amount:	\$67,90,000.00
Probability (%):	10%
Expected Revenue:	\$6,79,000.00
Close Date:	28/10/2023
Last Modified By:	Zahid Khan
Last Modified:	18/10/2023, 4:27 pm

- Now, login the manager account and approved the request. For this go to set up click search for users and click on login beside the nick deo because he is a manager.

The screenshot shows the Salesforce Setup interface under the 'Users' tab. On the left sidebar, 'User Management Settings' is selected. The main area displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. A red box highlights the 'Edit' link for the user 'Deo, John'. The URL for this specific row is: /users/edit?userId=005f00000cxps0eav.com

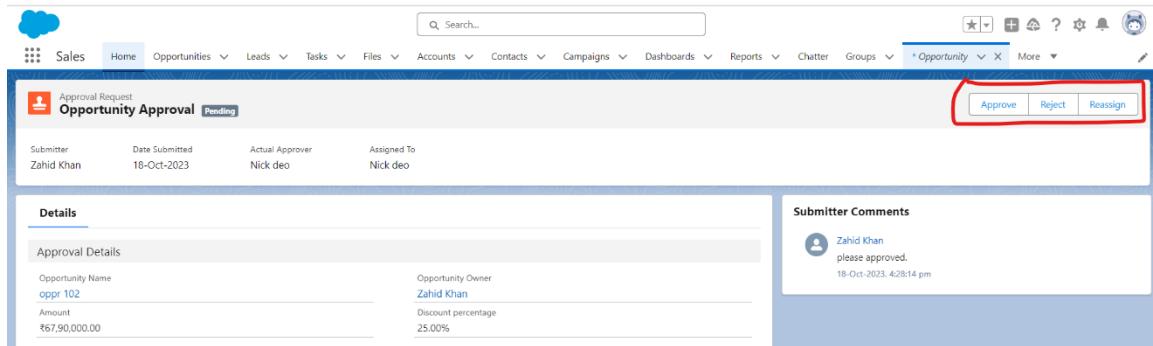
- we can't see that request in the opportunity in manager account because we use free license, but this is the process only.
- Here, we are a system administrator so we can also approve the request. For this go the front end of the sales app in system administrator account and click on opportunities tab. After that open that records and click on details after that click on view all in approval history.

The screenshot shows the Salesforce Sales app interface. An opportunity record is open with the ID 'opp102'. In the details panel, there is a 'Approval History' section. A red box highlights the 'View All' button at the bottom of this section. The URL for this view is: /opportunities/opp102/approvalhistory

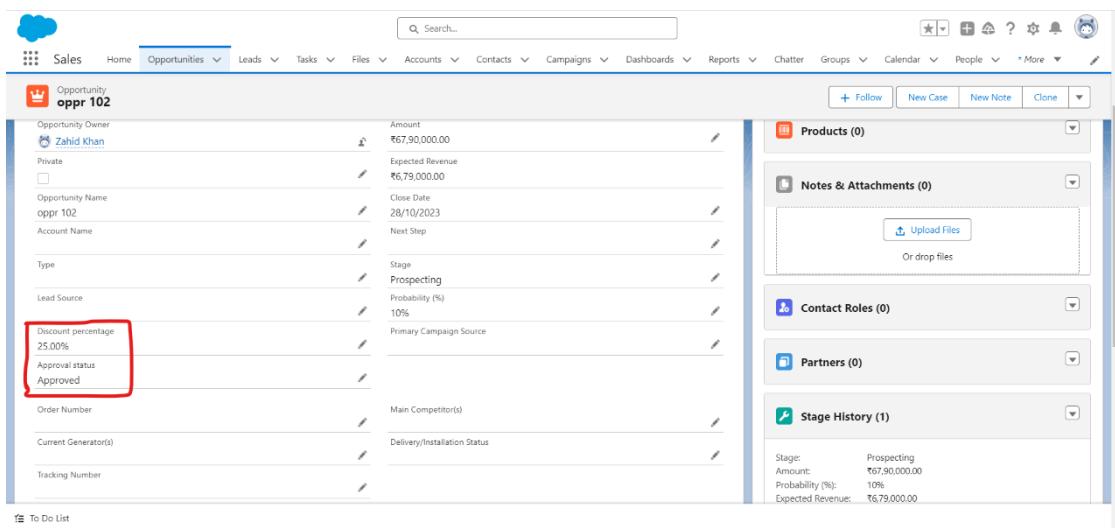
- After that click on manager approval

The screenshot shows the Salesforce Sales app interface with the 'Opportunities' tab selected. A list of approval requests is displayed. A red box highlights the first row, which corresponds to the 'Manager Approval' entry in the previous screenshot. The URL for this list is: /opportunities/approvalhistory

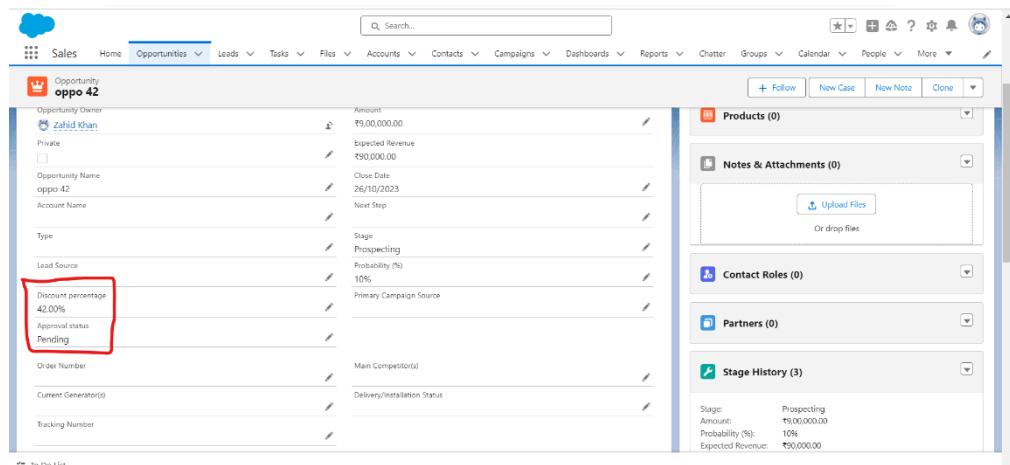
- After that we get 3 buttons approved, reject and reassign. We can do anything because we are a system administrator.



- Here, we are approved the request because its greater than 20%. Now its approved. If we have access to manager app so that manager will approve that.



- Now, create new records in opportunities object and this time enter discount more than 40%. (I.e., 42%). And click on submit for approval. This time its showing pending because VP approval needed.



- Now, login the VP account and approved the request. For this go to setup click search for users and click on login beside the john deo because he is a VP.

The screenshot shows the Salesforce Setup interface under the 'Users' section. The left sidebar includes options like 'Permission Set Groups', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. Under 'Users', there are sub-options for 'Feature Settings', 'Data.com', and 'Prospector Users'. The main area is titled 'All Users' and displays a table of users. One row for 'John Deo' has a red box around the 'Edit | Login' link. The table columns include Action, Full Name, Alias, Username, Role, Active, and Profile. The 'Profile' column shows various roles such as 'Chatter Free User', 'Standard Platform User', 'Manager', 'System Administrator', 'Analytics Cloud Integration User', and 'Demo profile'.

- we can't see that request in the opportunity in VP account because we use free license, but this is the process only.
- Here, we are a system administrator so we can also approve the request. For this go the front end of the sales app in system administrator account and click on opportunities tab. After that open that records and click on details after that click on view all in approval history.

The screenshot shows the Salesforce Sales interface under the 'Opportunities' tab. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Chatter', 'Groups', 'Calendar', 'People', 'More', and a pencil icon. The main area shows an opportunity record for 'oppo 4'. On the right side, there is a sidebar with sections for 'Close Date', 'Last Modified By', and 'Approval History (2)'. The 'Approval History (2)' section contains two entries: 'Manager Approval' and 'Approval Request Submitted'. Both entries show details like date, status, assigned to, and actual approver. A red box highlights the 'View All' button at the bottom of the approval history sidebar.

- Now in below image we can see that this show manager approval 1st because it's a hierarchy. 1st managers have to approve the request after that it goes to VP and after that VP will approve the request. So, 1st click on manager approval and approved by clicking on approved button.
- Now it goes to VP approval.

This screenshot shows the 'Opportunity Approval' page in Salesforce. At the top, there's a header with navigation links like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, and more. Below the header, the main content area has a title 'Approval Request Opportunity Approval Pending'. It displays details such as Submitter (Zahid Khan), Date Submitted (20-Oct-2023), Actual Approver (John Deo), and Assigned To (John Deo). On the right side, there are buttons for Approve, Reject, and Reassign. A red box highlights the 'Approve' button.

- Now click on VP approval and approved by clicking on approve button.

This screenshot shows the 'Approval History' page for opportunity 'zahid'. The page lists three steps: 'VP approval' (Pending), 'Manager Approval' (Approved), and 'Approval Request Submitted' (Submitted). The 'VP approval' row is highlighted with a red box. At the top right, there are buttons for Approve, Reject, Reassign, and Recall. A red box also highlights the 'Approve' button.

- After that this request status will show approved.

This screenshot shows the detailed view of opportunity 'zahid'. On the left, there's a sidebar with various fields like Opportunity Name (zahid), Account Name, Type, Lead Source, Discount percentage (45.00%), Approval status (Approved), Order Number, Current Generator(s), and Tracking Number. The 'Approval status' field is highlighted with a red box. On the right, there are sections for Notes & Attachments (0), Contact Roles (0), Partners (0), and Stage History (1). The Stage History section shows one entry with details: Stage: Qualification, Amount: \$80,000.00, Probability (%): 10%, Expected Revenue: \$80,000.00, Close Date: 28/10/2023, Last Modified By: Zahid Khan, and Last Modified: 20/10/2023, 11:46 pm.

- This way we can create approval process for any request.

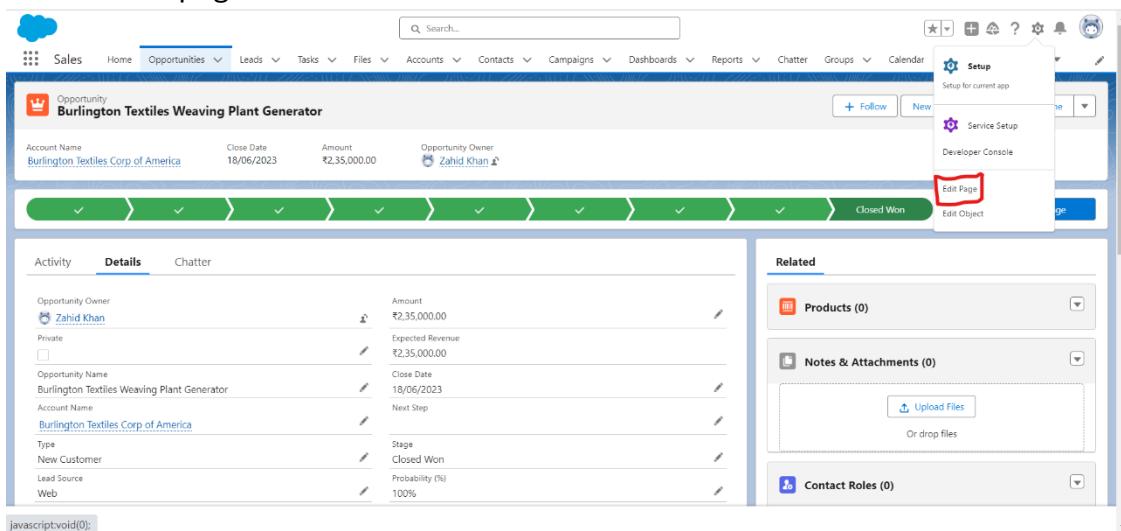
Day-15

Dynamic Form

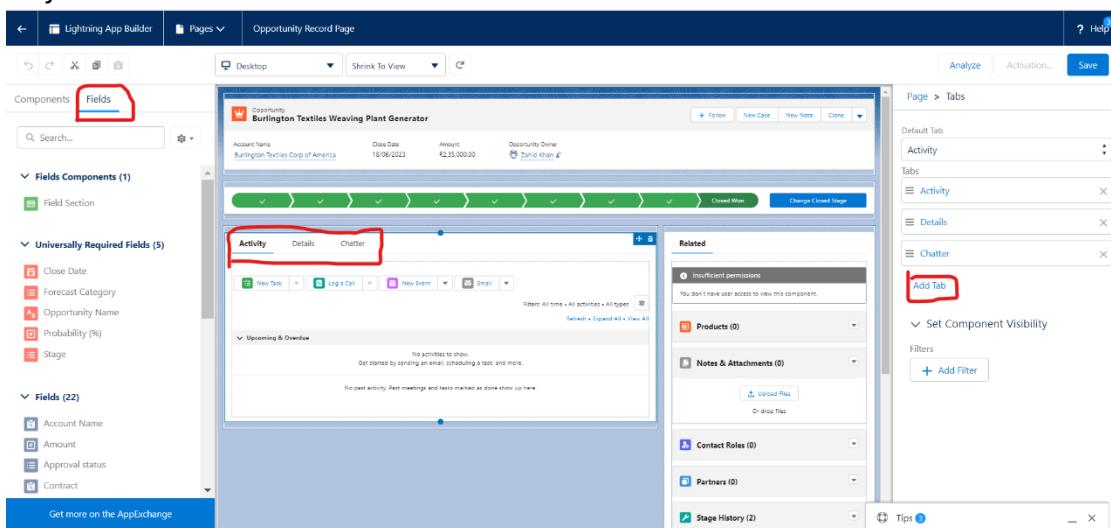
- We can create dynamic form in our record details page.
- dynamic form is same as our page layout, but we can add the field which want to show in dynamic form.
- We can add dynamic form using record type lighting page.

steps to create dynamic form:

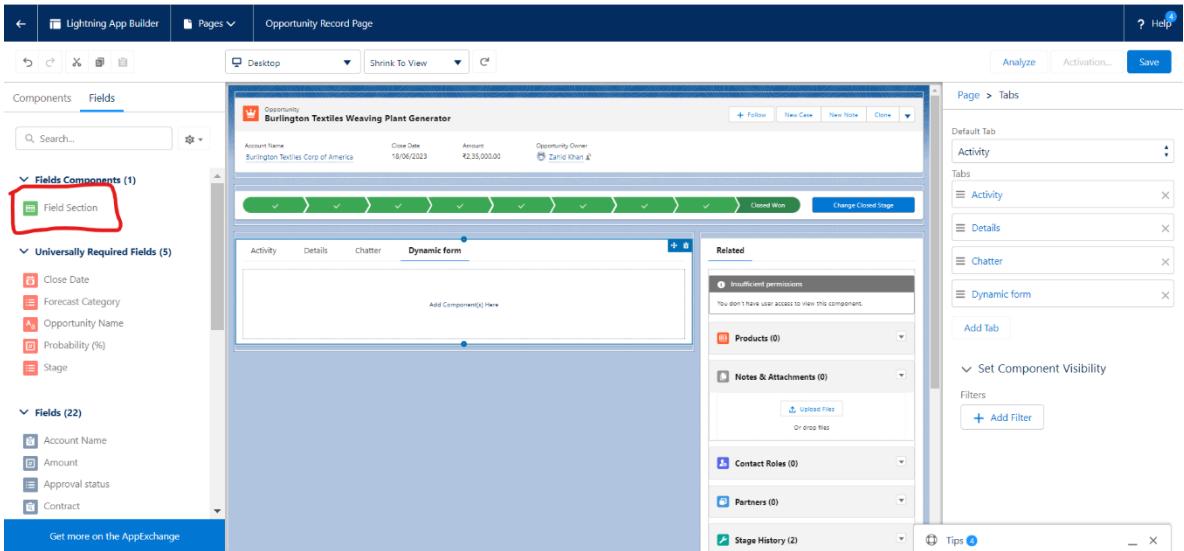
- 1st go to the details of any records of the object. For example, we are going to make dynamic form of opportunities object.
- Open any records in opportunities tab. After that click on the set-up icon and click on edit page.



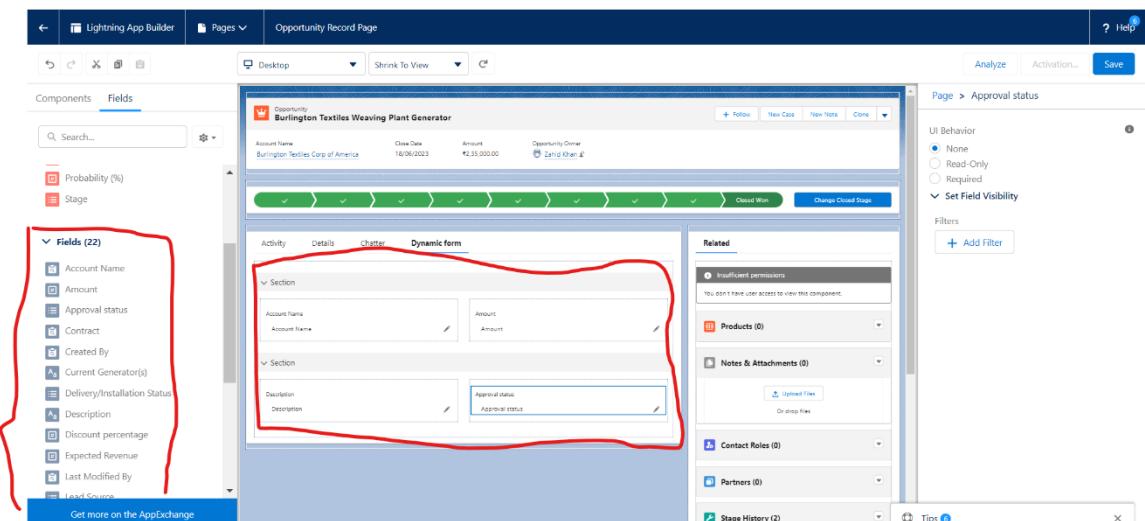
- After that we 2 options components and fields on left hand side. Click on fields.
- After that click on the details tab so that we can create new tab named as dynamic form. click on Add tab so that we can create new tab.



- After that create a custom tab named as dynamic form.
- In dynamic form tab we can add the field same as page layout for this select **field section** and drag it inside the dynamic form tab.



- Now section is added, and we have 2 section we can add any field from fields options.
- Just select the field and drag it inside the field section.



- This way dynamic form is created we can also add visibility filter for every field. We can also rename the section same as page layout.
- For this just click on the section so that edit action will show.
- We can also apply filter for each section.

- now click on save and activate the page. After that check the results by opening the any record of opportunities object.

Quick Action

- Quick action means the button which is available inside the object and by clicking on that button we can redirect to the form of another object it known as a quick action or object specific action.

Steps to create quick action or object specific action:

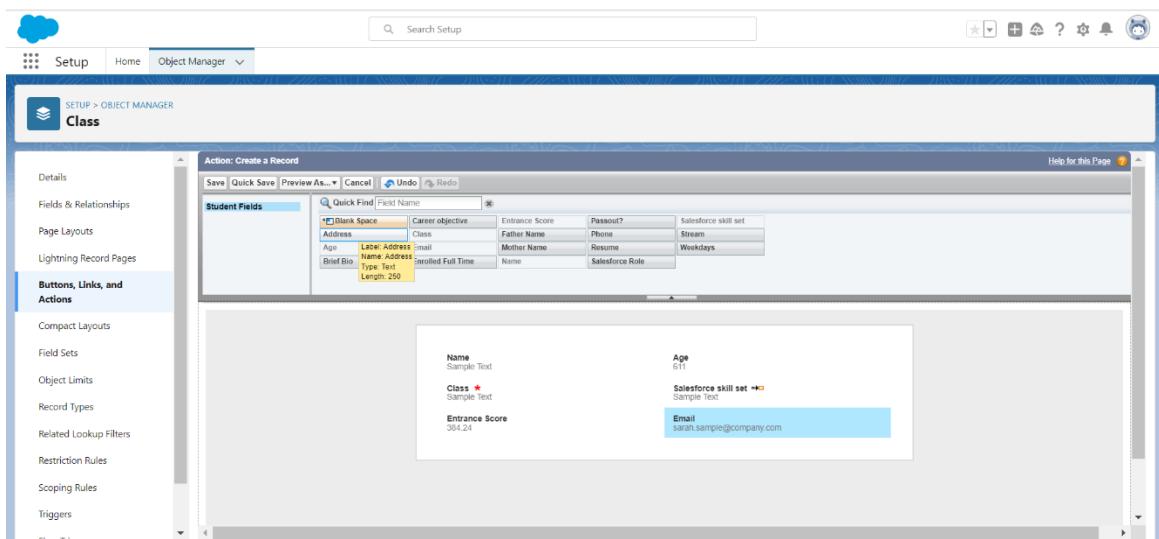
- For example, we are going to create a quick action in class object and attached it to the student object. So, when we click new student (custom) button in class object its redirect to the student object.
- Now, go to the object manager and search for class object because we are going to create quick action inside the class object.
- After that click on the Button, Link & action.
- After that click on new action.

The screenshot shows the Salesforce Object Manager interface for the 'Class' object. On the left, there's a sidebar with various tabs like Details, Fields & Relationships, Page Layouts, etc., with 'Buttons, Links, and Actions' highlighted by a red box. The main area is titled 'Buttons, Links, and Actions' and lists eight items: Accept, Clone, Delete, Edit, List, New, View, and classes Tab. At the top right of this list, there are buttons for 'Quick Find', 'New Action' (which is highlighted with a red box), and 'New Button or Link'.

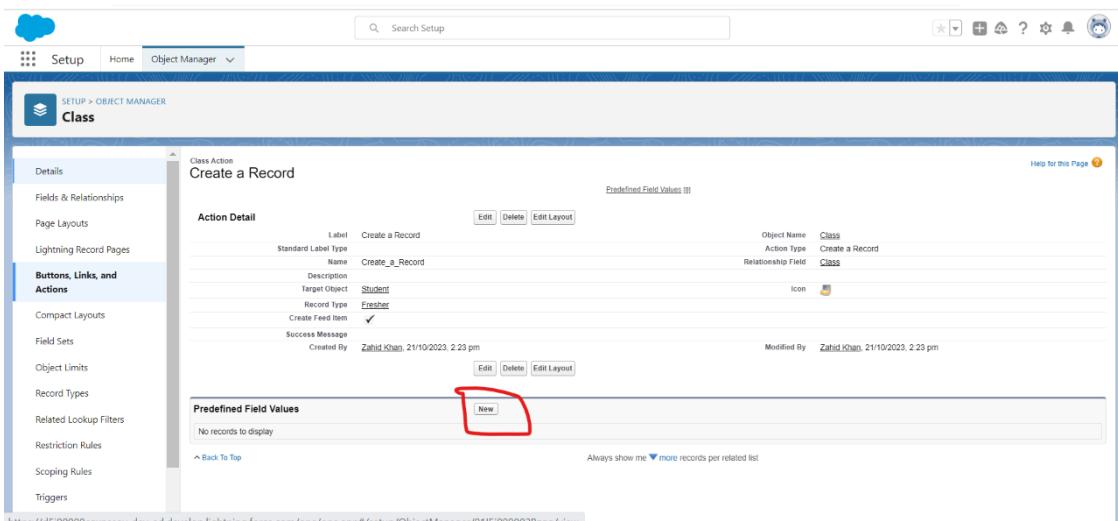
- After that enter the action type, we have lot of options, but we choose to create a record. After that enter the target object i.e., student.
- After that we have to choose record type because we have 2-page layout for student object fresher layout, experienced layout. Here, we are choosing fresher layout.
- After that enter label, description, success message and save.

The screenshot shows the 'Enter Action Information' page for creating a new action. The 'Object Name' is 'Class', 'Action Type' is 'Create a Record', 'Target Object' is 'Student', and 'Record Type' is 'Fresher'. The 'Standard Label Type' is 'None'. The 'Label' is 'Create a Record' and the 'Name' is 'Create_a_Record'. Under 'Description', there's a note about creating feed items. The 'Success Message' is 'Change icon' and the 'Icon' is 'Change icon'. At the bottom, there are 'Save' and 'Cancel' buttons.

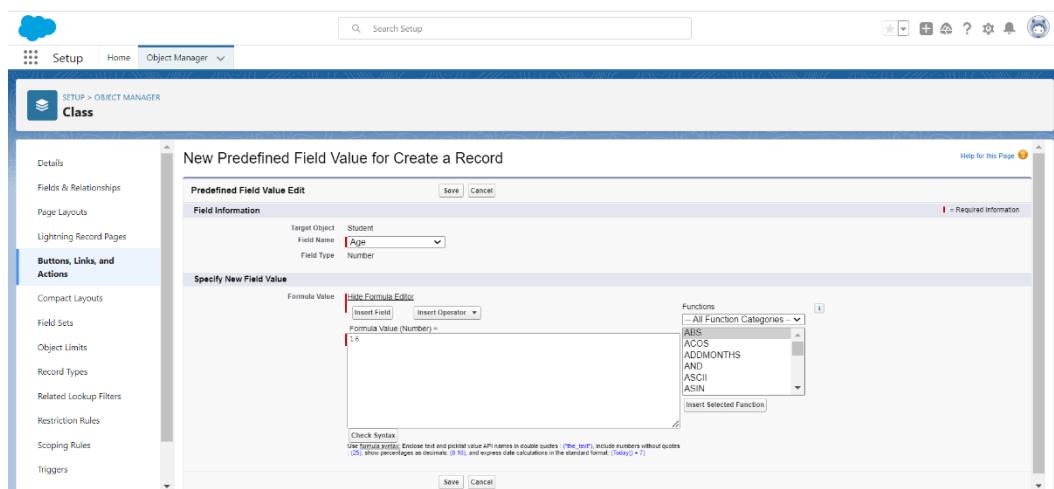
- After that one page will open and we have to enter the field like which field should be display when we click on this quick action button.
- Just select and drag the field. And always enter that field which has validation rule. Otherwise, it gives error.



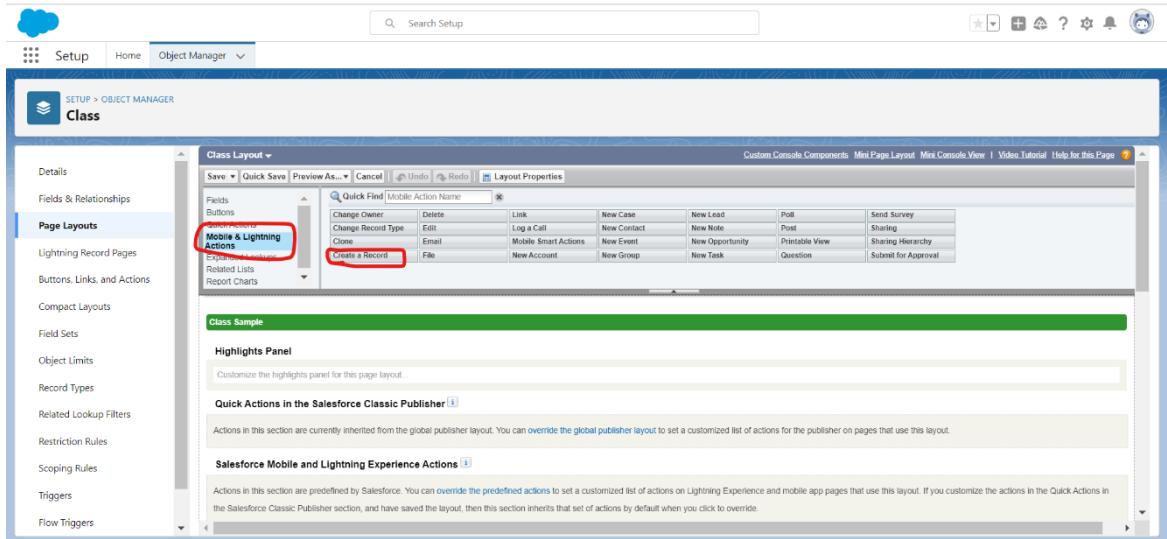
- click on save. Now quick action is created. we can also enter predefined field by on new button inside predefined field types.



- After clicking on new we have to choose field and their value. Now click on save.

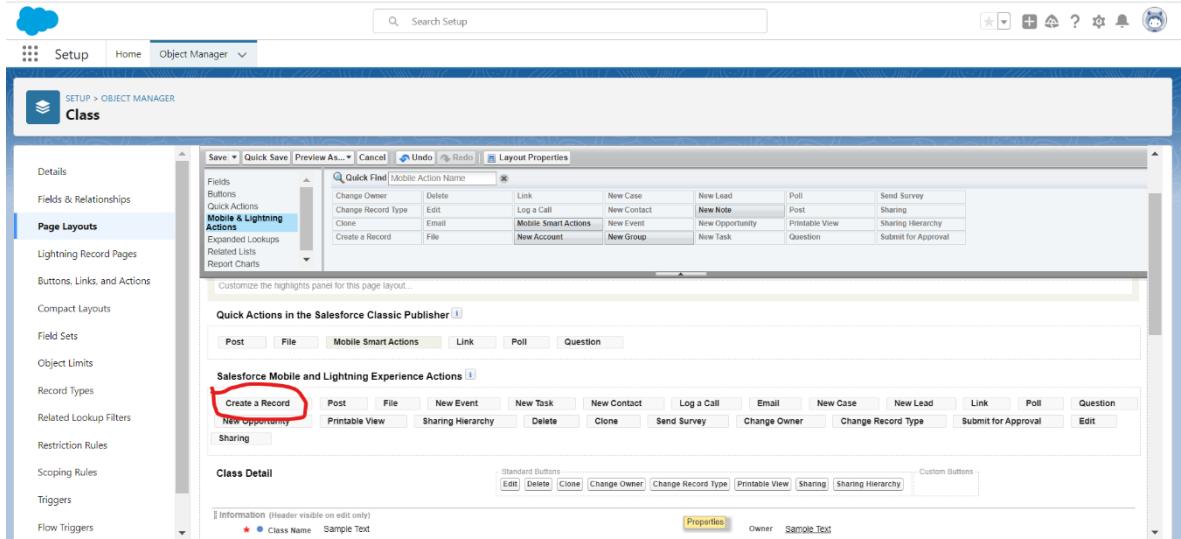


- After that we have to insert this newly created quick action button to the page. For this click on page layout of the class object and click on mobile and lighting action. Inside this we can find our newly created quick action i.e., create a

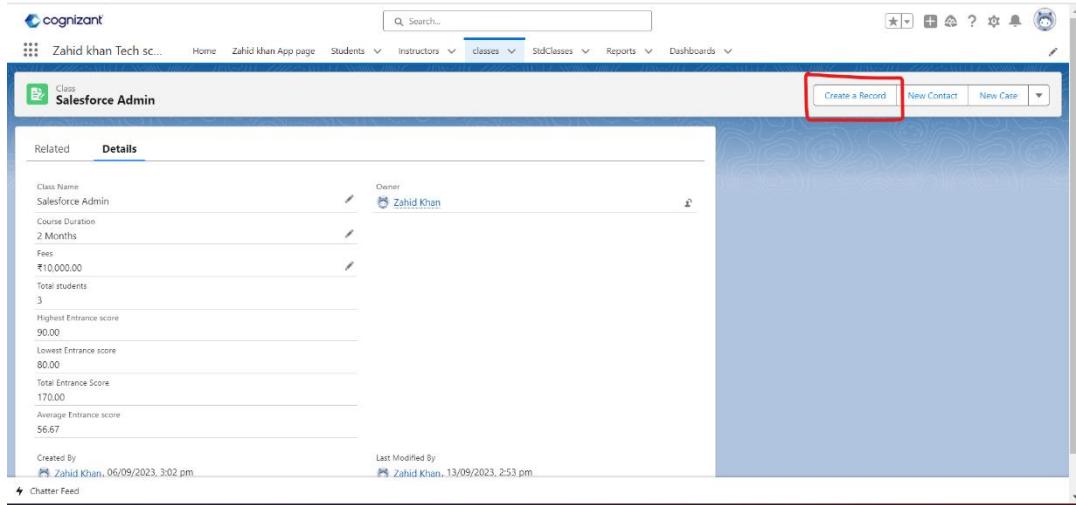


record.

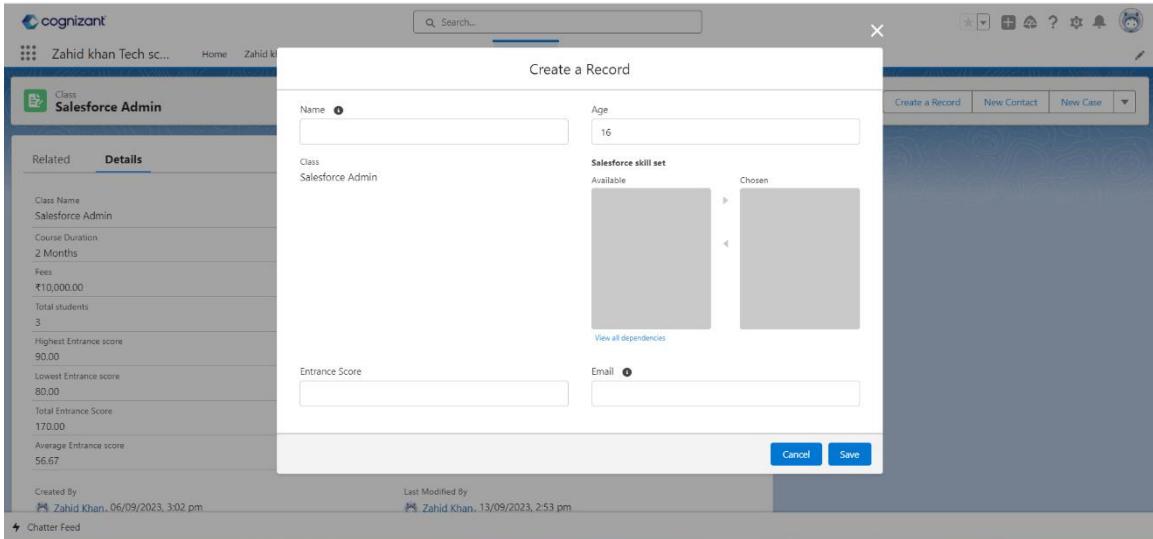
- After that click **on override the predefined actions** inside the salesforce mobile and lighting experience actions.
- Just select the quick action i.e., create a record and insert inside the salesforce mobile and lighting experience actions. And click on save.



- Now go the class object and open a record and check that create a record button will appear.



- When we click on create a record new form will open with those field which we insert and also predefined field.



- This way we can create quick action button for any object. But the condition is that both objects will be related to each other.

Global actions

- global actions mean we can create a record for any object without opening that object tab.
- By clicking on the + icon on top of the screen we can see the global actions options. Inside, this + icon we can see the number of options.

The screenshot shows a Salesforce interface for managing a class named 'Salesforce Admin'. The 'Details' tab is selected, displaying various class statistics like duration, fees, and student counts. A 'GLOBAL ACTIONS' sidebar is open, listing standard actions such as 'New Event', 'New Task', and 'Email'. The 'New Case' action is highlighted with a red box.

- these are pre-defined global actions. We can also add global actions as per our requirements.

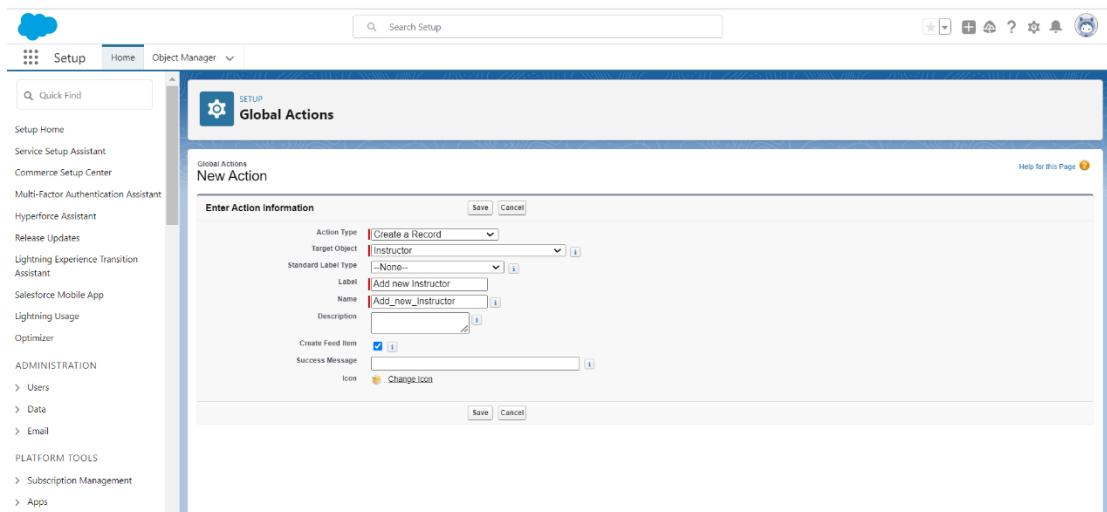
Steps to create global actions:

- Here, we want to create global actions for instructor object.
- Click on setup and go the home. Search for global actions in quick search. After that click on new action.

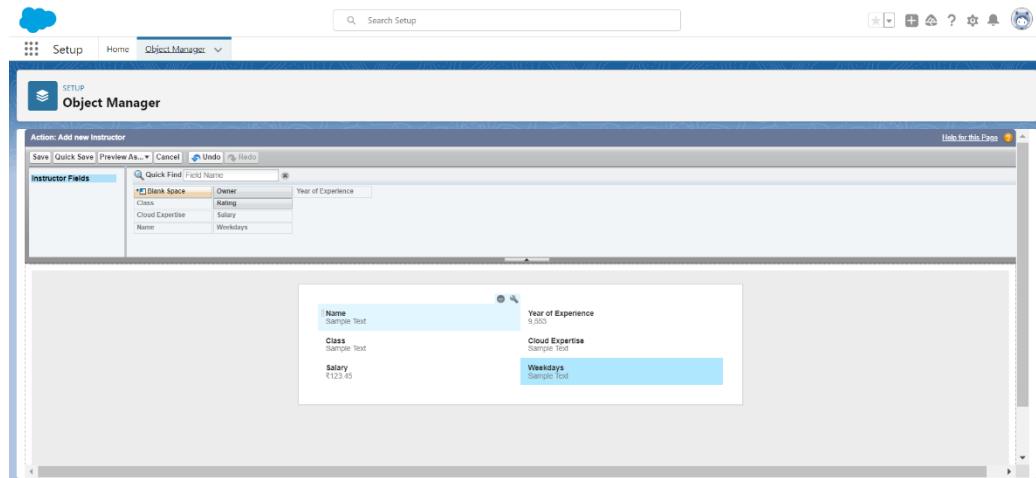
The screenshot shows the 'Global Actions' section in the Salesforce Setup. The left sidebar has 'Global Actions' selected. The main area displays a table of existing global actions, with a 'New Action' button highlighted by a red box. The table columns include Action, Label, Name, Description, Target Object, Type, Content Source, and Icon.

Action	Label	Name	Description	Target Object	Type	Content Source	Icon
Edit Del Layout	Email	SendEmail	Send Email		Send Email	Action Layout Editor	✉
Edit Del Layout	Log a Call	LogACall	Log a Call		Log a Call	Action Layout Editor	☎
Edit Del Layout	New Account	NewAccount	Create a Record	Account	Create a Record	Action Layout Editor	✚
Edit Del Layout	New Case	NewCase	Create a Record	Case	Create a Record	Action Layout Editor	ticket
Edit Del Layout	New Contact	NewContact	Create a Record	Contact	Create a Record	Action Layout Editor	👤
Edit Del Layout	New Event	NewEvent	Create a Record	Event	Create a Record	Action Layout Editor	📅
Edit Del Layout	New Group	NewGroup	Create a Record	Group	Create a Record	Action Layout Editor	👥
Edit Del Layout	New Lead	NewLead	Create a Record	Lead	Create a Record	Action Layout Editor	👤
Edit Del Layout	New Note	NewNote	Create a Record	Note	Create a Record	Action Layout Editor	📝
Edit Del Layout	New Opportunity	NewOpportunity	Create a Record	Opportunity	Create a Record	Action Layout Editor	💰
Edit Del Layout	New Task	NewTask	Create a Record	Task	Create a Record	Action Layout Editor	📝

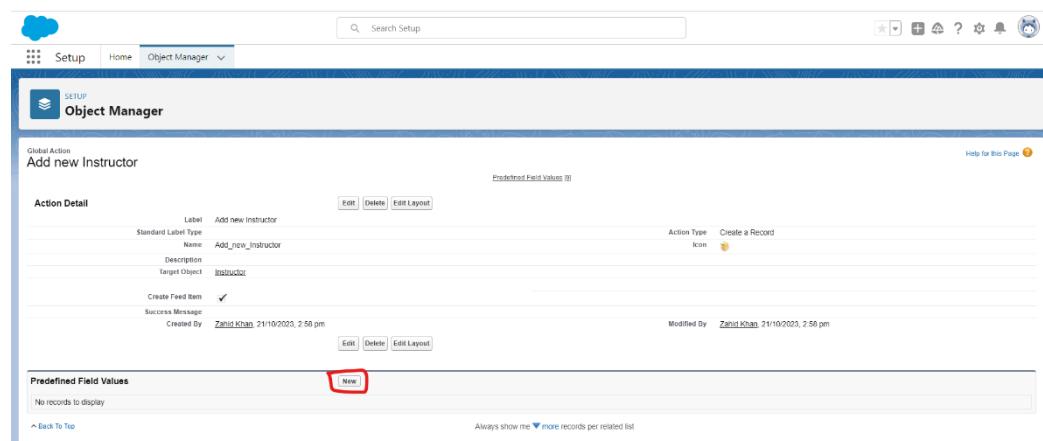
- After that choose the action type same as quick action. Here, we are selecting create a record.
- After that select target object as Instructor and label and click on save.



- after that we page will open, we have to choose the field like which field will be visible when we click on this global action button.
- Just select the field and drag it to the blank space. And click on save.



- We can also add pre-defined field values by clicking on new button same as quick action.



- Now go to home and again search for global action so that we can see our newly created global action.

The screenshot shows the 'Global Actions' page in the Salesforce Setup. The left sidebar shows 'User Interface' and 'Global Actions'. The main area is titled 'Global Actions' with the sub-header 'Create, edit, and view global actions, which can be used on detail pages, the home page, and the Chatter tab.' A table lists various actions, including 'Add new Instructor' which is highlighted with a red box.

Action	Label	Name	Description	Target Object	Type	Content Source	Icon
Edit Del Layout	Add new Instructor	Add_new_Instructor		Instructor	Create a Record	Action Layout Editor	
Edit Del Layout	Email	SendEmail			Send Email	Action Layout Editor	
Edit Del Layout	Log a Call	LogACall			Log a Call	Action Layout Editor	
Edit Del Layout	New Account	NewAccount		Account	Create a Record	Action Layout Editor	
Edit Del Layout	New Case	NewCase		Case	Create a Record	Action Layout Editor	
Edit Del Layout	New Contact	NewContact		Contact	Create a Record	Action Layout Editor	
Edit Del Layout	New Event	NewEvent		Event	Create a Record	Action Layout Editor	
Edit Del Layout	New Group	NewGroup		Group	Create a Record	Action Layout Editor	
Edit Del Layout	New Lead	NewLead		Lead	Create a Record	Action Layout Editor	
Edit Del Layout	New Note	NewNote		Note	Create a Record	Action Layout Editor	
Edit Del Layout	New Opportunity	NewOpportunity		Opportunity	Create a Record	Action Layout Editor	
Edit Del Layout	New Task	NewTask		Task	Create a Record	Action Layout Editor	

- Now search for publish layout in quick search box. And click on it.
- After that click on edit option beside the global layout.

The screenshot shows the 'Publisher Layouts' page in the Salesforce Setup. The left sidebar shows 'User Interface' and 'Publisher Layouts'. The main area is titled 'Global Publisher Layout' with the sub-header 'This page allows you to create layouts of actions on Chatter publishers for global pages such as Home, Chatter Home, and User Profile. After creating global publisher layouts, you can assign them to different user profiles.' A table lists global publisher layouts, with an 'Edit' button highlighted with a red box.

Action	Publisher Layout Name	Created By	Modified By
Edit Del	Global Layout	Zahid Khan	Zahid Khan

- After that click on mobile & lighting actions.
- Now select the newly created global action i.e., Add new instructor and drag it inside the Salesforce Mobile and Lightning Experience Actions and click on save.

The screenshot shows the 'Global Layout' configuration page. The 'Mobile & Lighting Actions' section is highlighted with a red box. A global action 'Add new Instructor' is selected and being dragged into the 'Salesforce Mobile and Lightning Experience Actions' section, which is also highlighted with a red box.

- Now go the front-end of the app and click + icon we will see the newly created global action i.e., Add new instructor.

The screenshot shows a CRM application interface. At the top, there's a navigation bar with links like Home, Students, Instructors, classes, StdClasses, Reports, and Dashboards. Below the navigation is a search bar labeled 'Search...'. The main area displays a table of student records with columns: Student ID, Name, Age, Email, Class, Record..., Salesfor..., and a dropdown arrow. The table contains 6 items, all sorted by Student ID and filtered by All students, updated a few seconds ago. The student data is as follows:

Student ID	Name	Age	Email	Class	Record...	Salesfor...
1 S-0010	Md Zahid khan	25	zahid.k5@gmail.com	Salesforce Admin	Fresher	Developer
2 S-0011	Ahmad	24		Salesforce Admin	Fresher	Admin
3 S-0012	Shahid	28		Salesforce developer	Experienced	Developer
4 S-0013	Rahul	24		Salesforce developer	Experienced	Business An...
5 S-0014	anam	17		Salesforce Admin	Fresher	Quality Anal...
6 S-0017	khan		khan@gmail.com	Salesforce developer	Fresher	Admin

To the right of the table is a 'GLOBAL ACTIONS' menu with various options like New Event, New Task, New Contact, Log a Call, etc., each with a small icon. A red box highlights the 'Add new instru...' option at the bottom.

- when will click on this action instructor form will open without changing the records.

This screenshot shows the same CRM application interface as the first one, but with a modal dialog box open over the student list. The dialog is titled 'Add new Instructor' and contains fields for 'Class' (set to 'Salesforce developer'), 'Cloud Expertise' (with 'Available' and 'Chosen' sections), 'Salary' (empty input field), and 'Weekdays' (dropdown set to 'None'). A red box highlights the entire dialog box.

Cross object formula

- Cross object formula is used to show the data of the parent object inside the child object. But they should have a relationship between them.

Steps to create cross object formula:

- We are going to make cross object formula between class object (parent) and student object (child). We are going to fetch duration field from class object to the student object.
- So, go to object manager and search for student object after that click on field & relationship.
- After that click on new.
- Choose data type formula. And click on next.
- After that enter the label name and select formula type return as text. Because duration field in class object is in text. Click on next.
- After that click on insert field.

The screenshot shows the Salesforce Object Manager interface for creating a new field. The left sidebar lists various object categories like Page Layouts, Lightning Record Pages, and Fields & Relationships. In the main area, a formula field is being created with the name 'Duration (Text)'. The 'Simple Formula' tab is selected. A formula editor window is open, showing the formula 'Duration (Text)'. To the right, a 'Functions' sidebar lists various mathematical and string functions like ABS, AND, ADDMONTHS, AND, ASCII, ASIN, etc. A 'Quick Tips' sidebar provides links to 'Getting Started' and 'Operators & Functions'.

- After that click on **class** > so that all field of the class object will be available we can select anyone of them. Here, we are selecting course duration.

This screenshot shows the 'Insert Field' dialog box within the Salesforce Object Manager. The user has selected the 'Duration (Text)' field and is choosing a field from the 'Class' object. The 'Class' object is highlighted in the list, and its fields like Address, Age, Average Entrance score, Class Name, Created By, etc., are visible. A tooltip indicates that 'You have selected Class_r_Course_Duration_c' with an API name 'Class__r_Course_Duration__c'. The 'Type' is listed as 'Text'.

- We can also apply function on this field. But for now, we will show only field.
- Now click on next. Check the visible box and click on next. After that click on save. Now cross object formula field is created.
- Go to the student records and check that class field is visible.

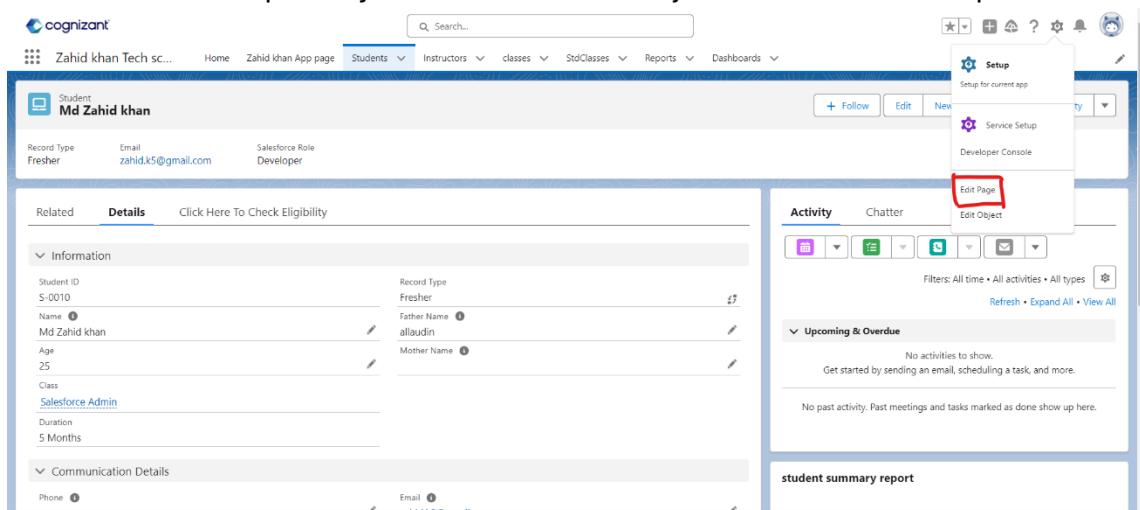
This screenshot shows a student record detail page for 'Md Zahid khan'. The 'Class' field is highlighted with a red box. The page includes sections for 'Information', 'Communication Details', and 'Activity'. The 'Information' section shows details like Student ID (S-0010), Name (Md Zahid khan), Age (25), and Class (Salesforce Admin). The 'Activity' section shows no upcoming or overdue activities.

Related list single

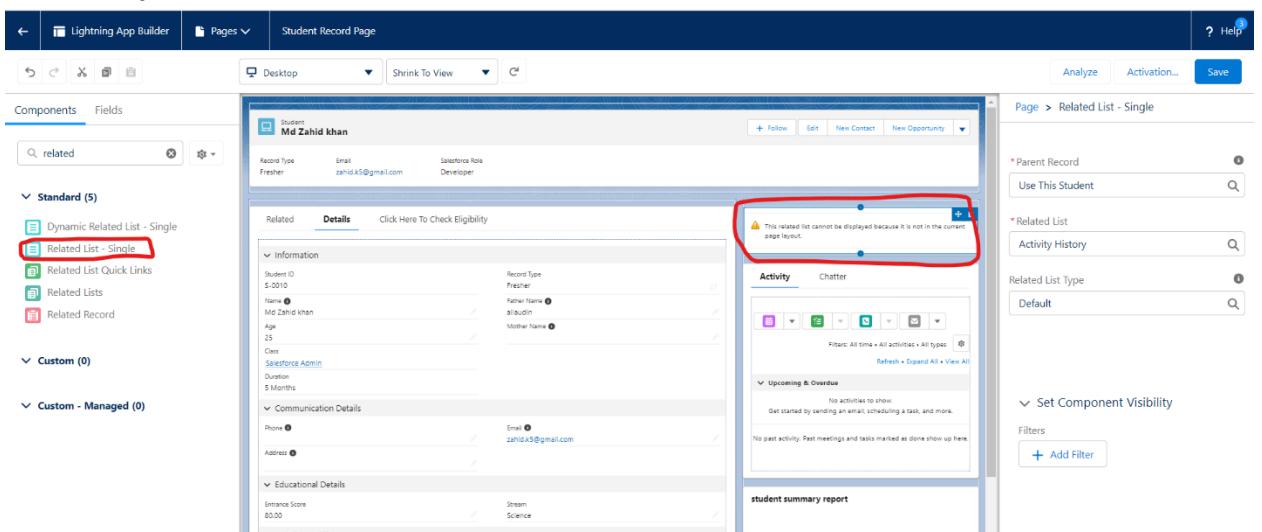
- Related list single is used to show the records of the child object records related to the one parent object records.
- For example, we have a class object which is related to student object. So, using related single list we can show the classmates which is related to one class object records.
- This is created in child object.

Steps to create related single list:

- We have to make related list single in child object because we want to show the records of child object which is related to some particular record in parent object. For example, students object is related to class object with salesforce admin or salesforce developer.
- For create this open any records of student object and click on set-up icon.



- Now, search for related list single in components and select and drag in before activity tab.



- In parent records select class. And in related list select student.

The screenshot shows the Lightning App Builder interface. A modal window is open for a record named 'Md Zahid khan'. In the 'Related' section, a 'Students for Parent Class' list component is being configured. The 'Related List Type' dropdown is highlighted with a red box and set to 'Default'. Other options like 'Parent Record' and 'Class' are also visible.

- After that save and check the results.

The screenshot shows the Salesforce app interface for the 'Student' object. The record 'Md Zahid khan' is selected. The 'Class' field is now populated with 'Salesforce Admin' (highlighted with a red box). On the right side, a 'Students for Parent Class' list component displays three records: S-0010, S-0011, and S-0014. This list is also highlighted with a red box.

- these all records are related to salesforce admin class.

Salesforce inspector extensions

Steps to install salesforce inspector extensions:

- Go to the chrome browser and search **salesforce inspector extensions**.
- After that click on 1st link and download the extension.
- Using this extension, we can perform lot of tasks.

App exchange

- An online marketplace for salesforce Apps, components, and consulting services.
- Developers or consultants can use it as a gateway for connecting with customer to provide their business solutions.
- Salesforce admin or users can find tools to improve their company's productivity.

how does AppExchange work?

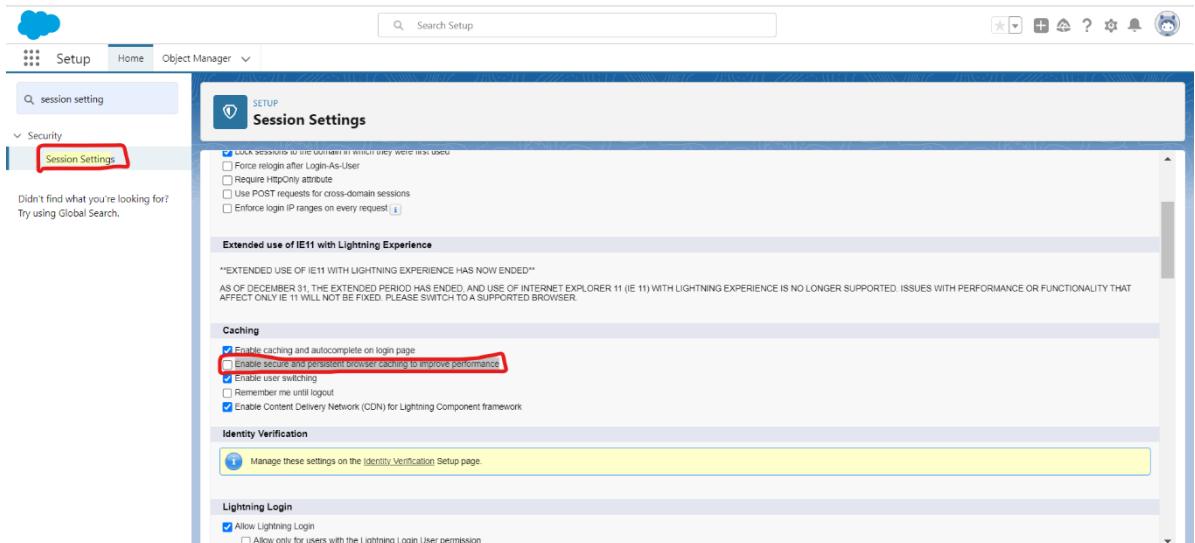
- Primary marketing tool for promoting App or components.
- In listing one can describe solutions, pricing, support, and other details.
- Can also upload videos, white papers, and other contents to help customers understand the app or component.
- AppExchange categorized the listing into various business areas like sales, marketing or analytics.

Who can use AppExchange?

- Anyone can browse listings and test apps or components.
- Need download packages permission to install app or components.
- To create a package and upload it to partner community. One must have created packages and upload packages permissions.
- To create and publish a listing, one must have the manage listings permissions.

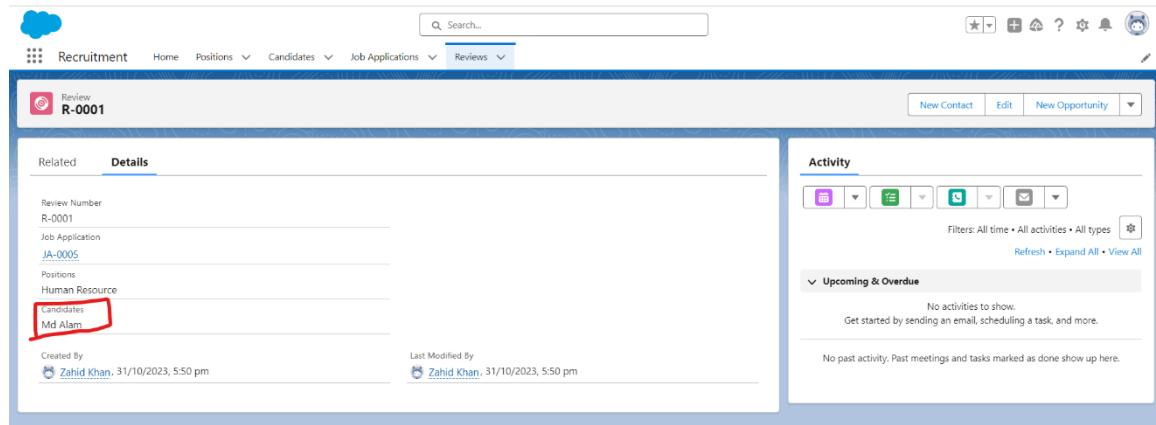
Note: - if field is not visible in the objects but you created it then follow the following steps to make it visible.

- Go to set-up and search for Session setting and click on this.
- After that go to caching option and disable the option **Enable secure and persistent browser caching to improve performance** and save.



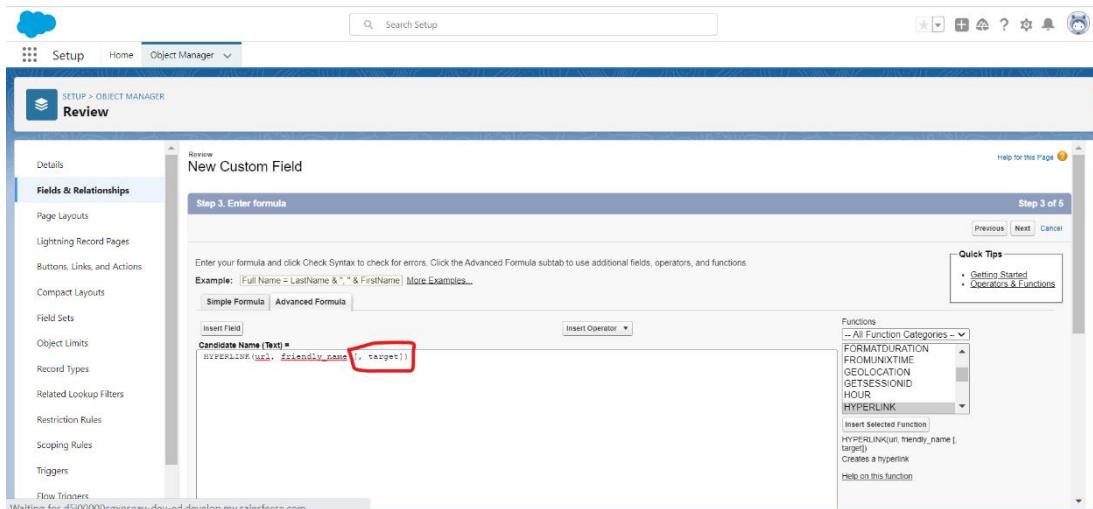
How to make Link of any text in field?

- In most of time we have to convert the text into link so that we can redirect the related records to the object.
- For example, in below image we want to make a link so that when we click on candidate name it will redirect to the records of that candidate.



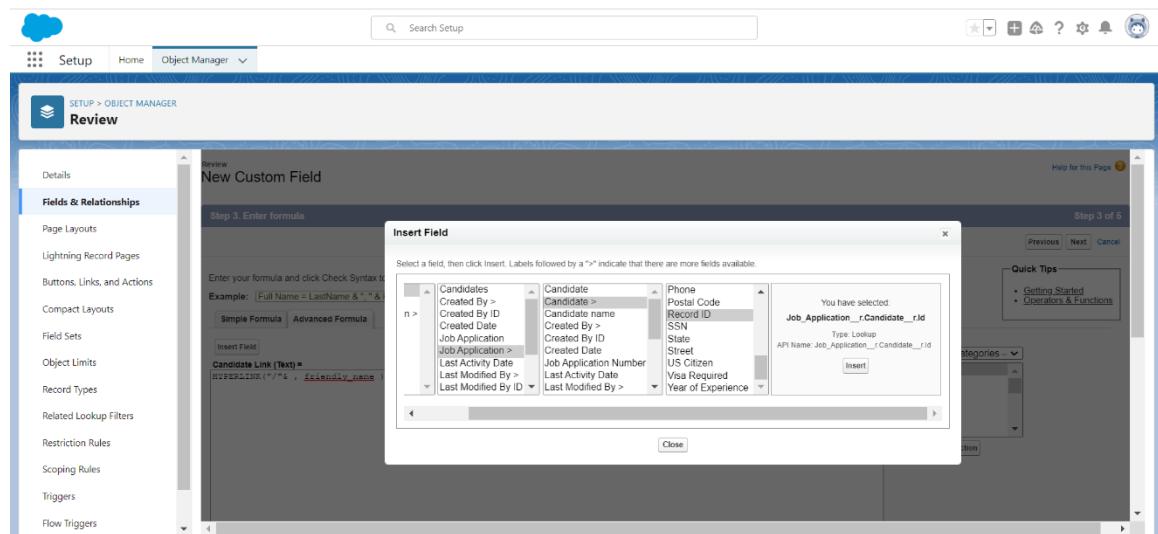
The screenshot shows a Salesforce interface for a 'Review' object with ID R-0001. The 'Details' tab is selected. On the left, there's a 'Related' section with fields for 'Review Number' (R-0001), 'Job Application' (JA-0005), 'Positions' (Human Resource), and 'Candidates' (Md Alam). The 'Candidates' field has a red box around its value 'Md Alam'. On the right, there's an 'Activity' sidebar showing no upcoming or overdue activities.

- Go to object manager and search for review object and click on it. After that click on fields & relationships.
- After that click on new.
- Select formula for data types. And click on next.
- After that enter field label and select Text in formula return type.
- Click on next.
- Now select HYPERLINK from functions tray and insert it.
- In hyperlink remove the target because we need only url and friendly name.

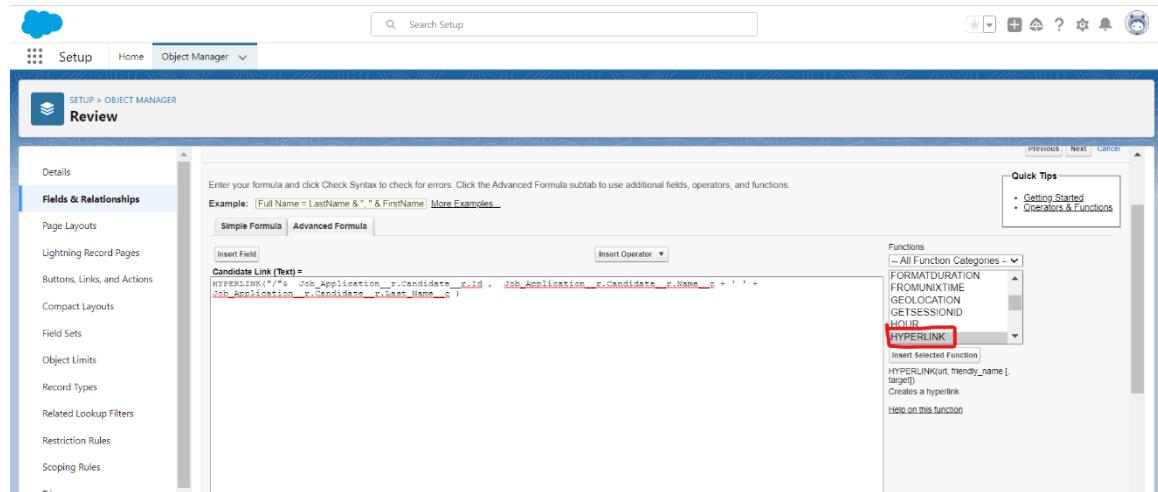


The screenshot shows the 'Object Manager' setup for a 'Review' object. It's on 'Step 3. Enter formula' of a custom field creation. The formula is 'Candidate Name (Text) = HYPERLINK(\$id, \$friendly_name, target)'. A red box highlights the word 'target' in the formula. The formula editor includes tabs for 'Simple Formula' and 'Advanced Formula', and a 'Functions' panel on the right with 'HYPERLINK' selected.

- Now in place of URL insert “/” & after this we have to specify the id where the record will redirect. For this click on insert field click on **job application**> after that **candidate**> and then select **Record Id**. and click on insert.



- After that we have to insert the friendly name means what should be visible on UI, we want to show candidate name. For this click on insert field **job application>** after that **candidate>** and then select **first name**. for insert 1st and last name insert like this first name + ' ' + last name.



- Now click on next after that click the visible check box then click on next. And save.
- Now go to front-end and check.

