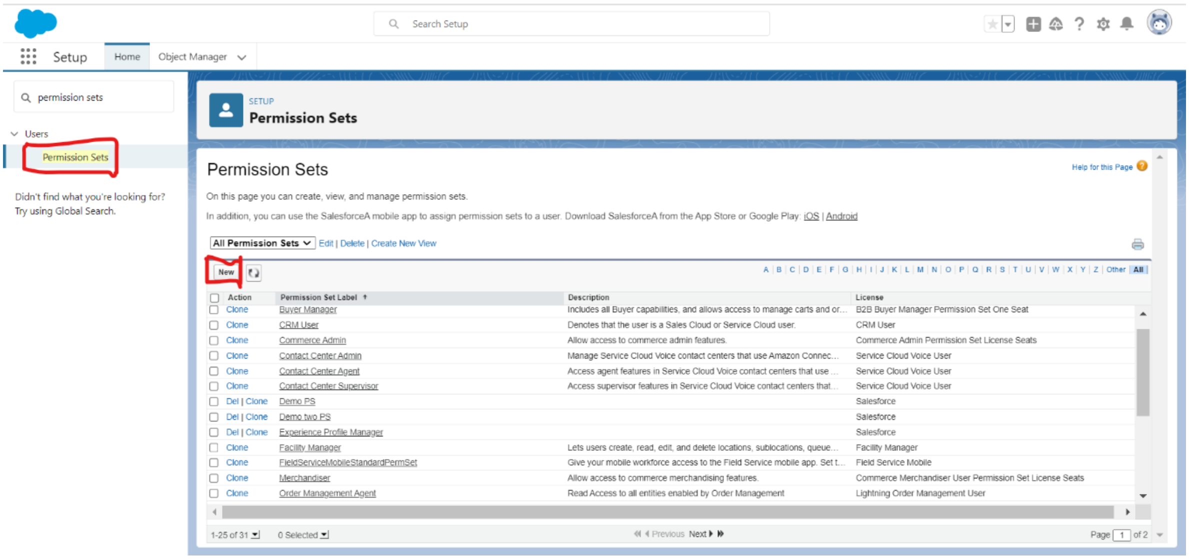
Day-12

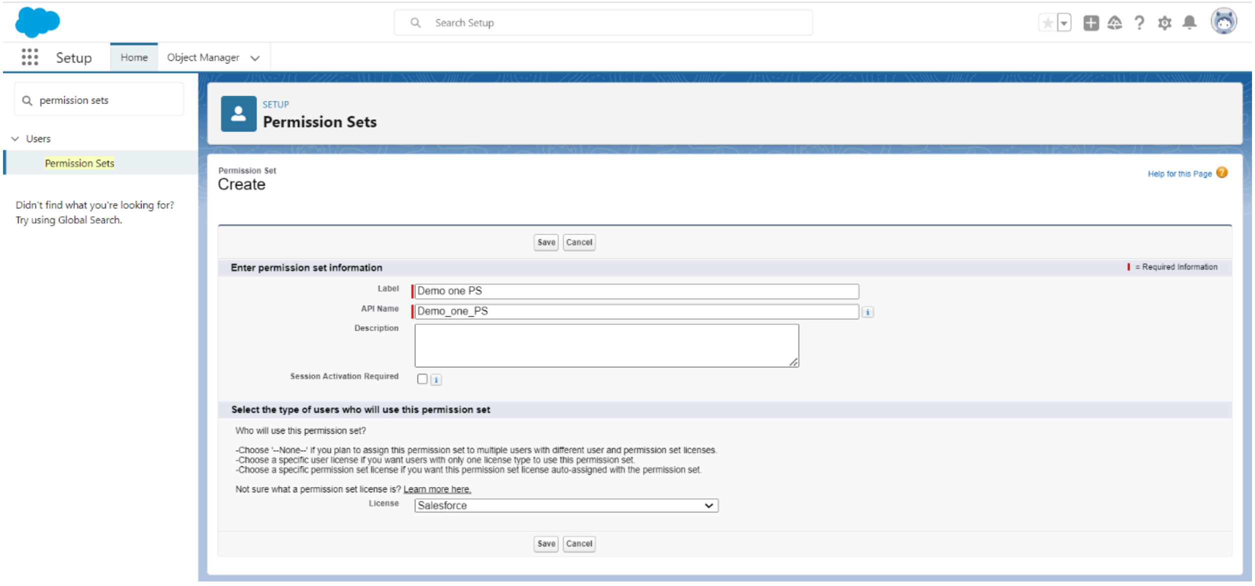
- Permission set group bundles different permission sets together based on a persona.
- A permission set group includes all the permissions available in the permission sets.
- One permission set can be included in more than one permission set groups.
- A user can be assigned one or more permission set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

Steps to create permission set groups:

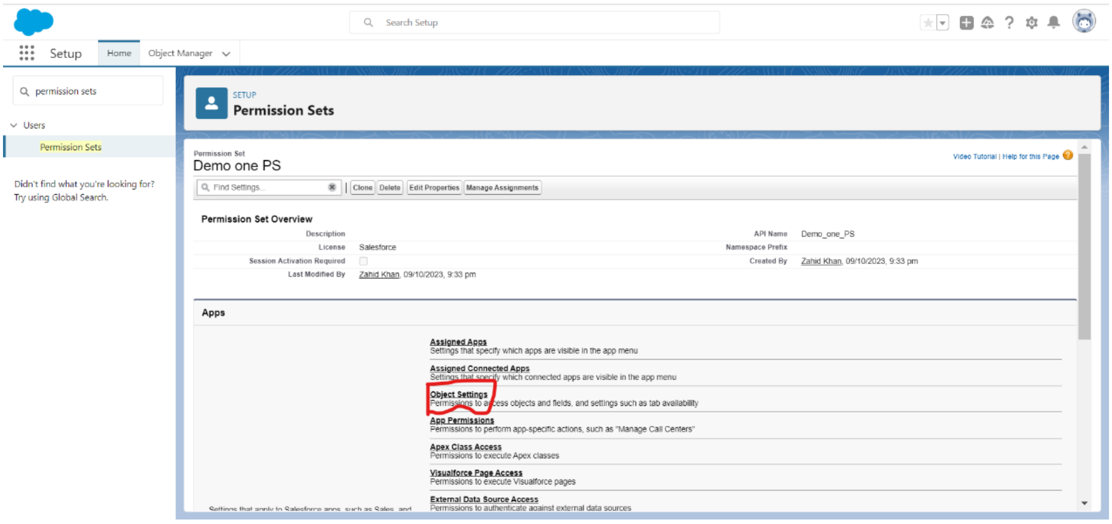
- Before creating permission set groups. We have to create 2 or more than and add them in one group and assign it to the users.
- 1st create 2 or more permission set before creating permission set group. For example, we are creating 2 permission set **Demo one PS, Demo two PS** and give them different access like for demo one Ps we give edit access iand 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.



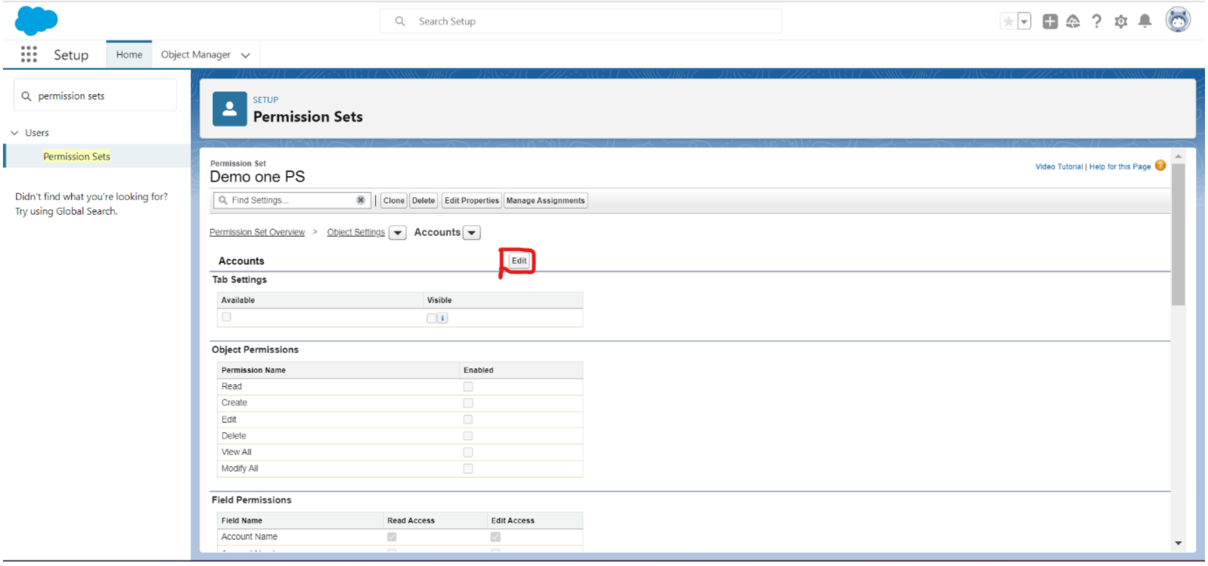
- Now give the label as Demo one PS.
- select license as salesforce.
- click on save.



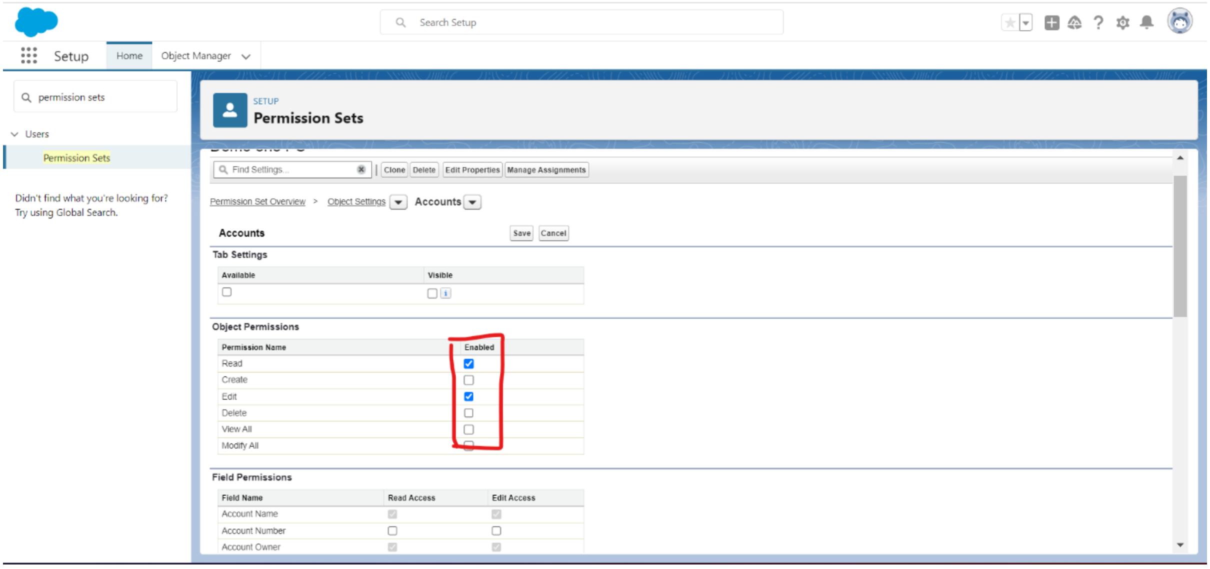
- Now permission set is created, and we can edit any access. Here we are edit objects settings and give only edit access to demo one PS and give access of industry field to this permission sets.



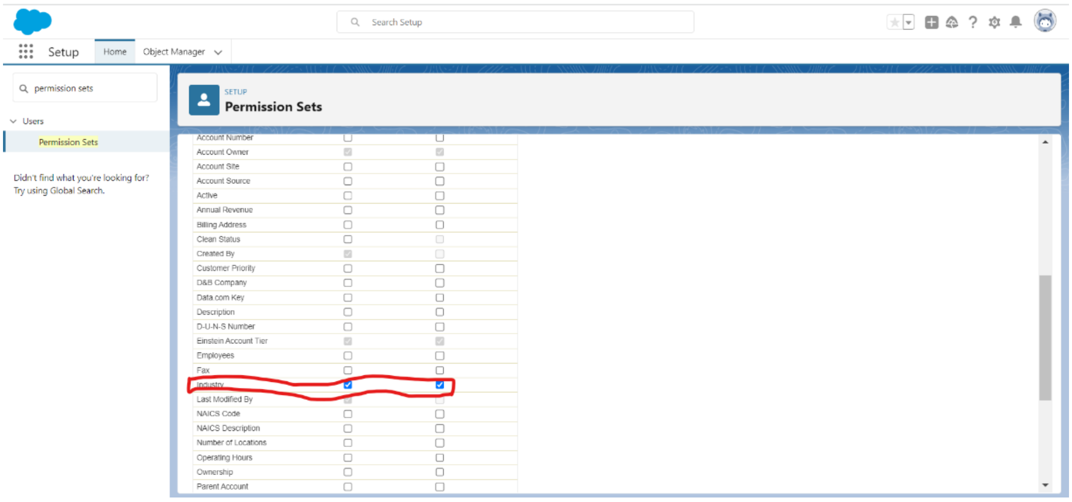
- After that we get all the objects of the org., we can select any object which is required. Here, we are selecting Account object.
- After that click on edit.



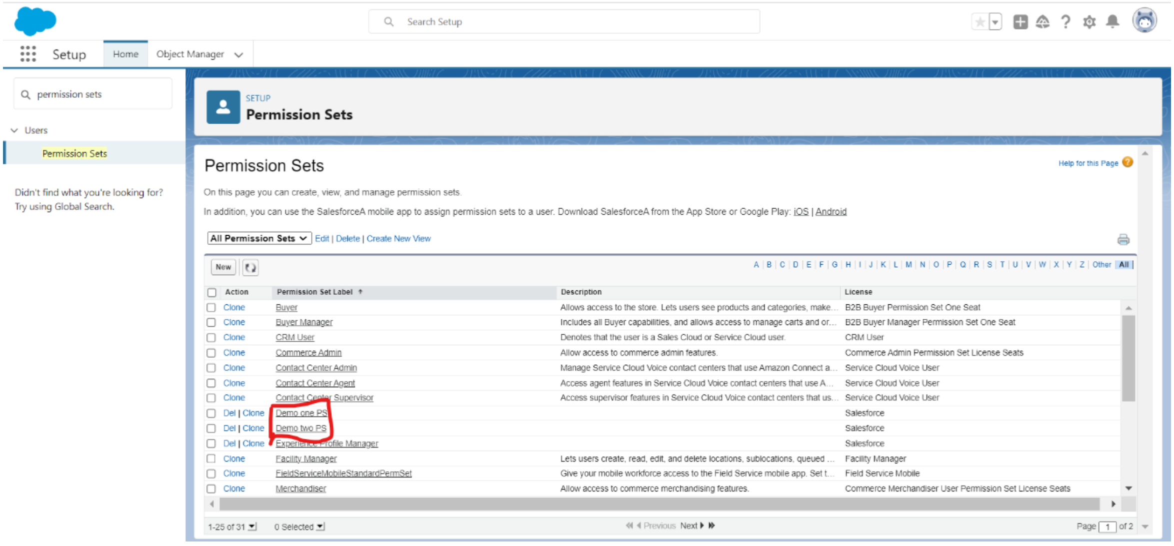
- now check the box of edit, read box auto enable.



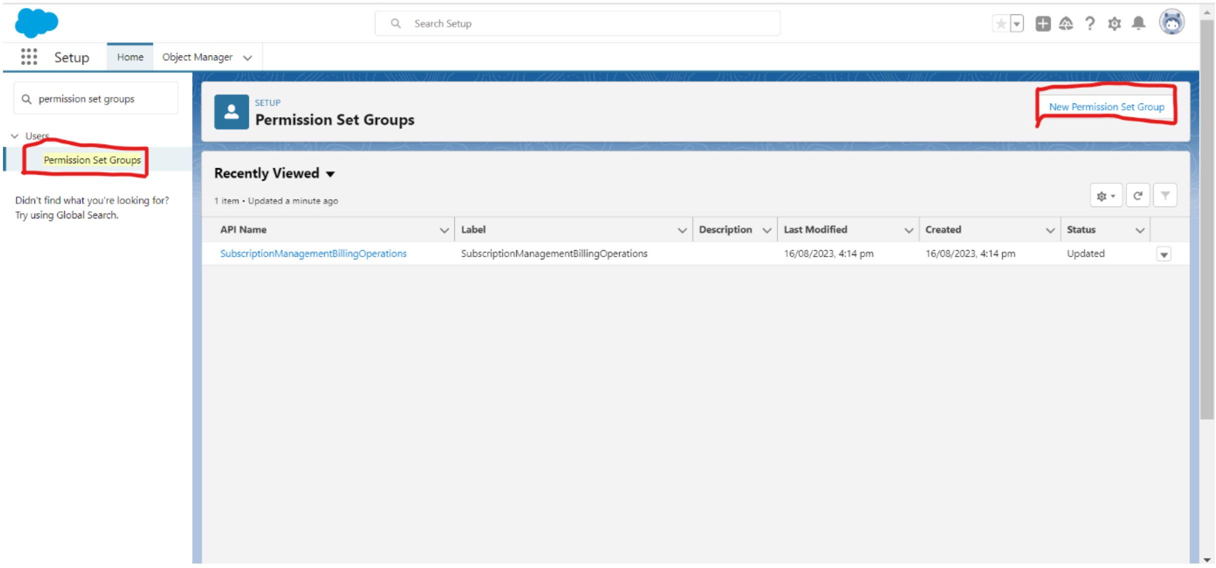
- After that check the edit and read access of industry field in field permissions.



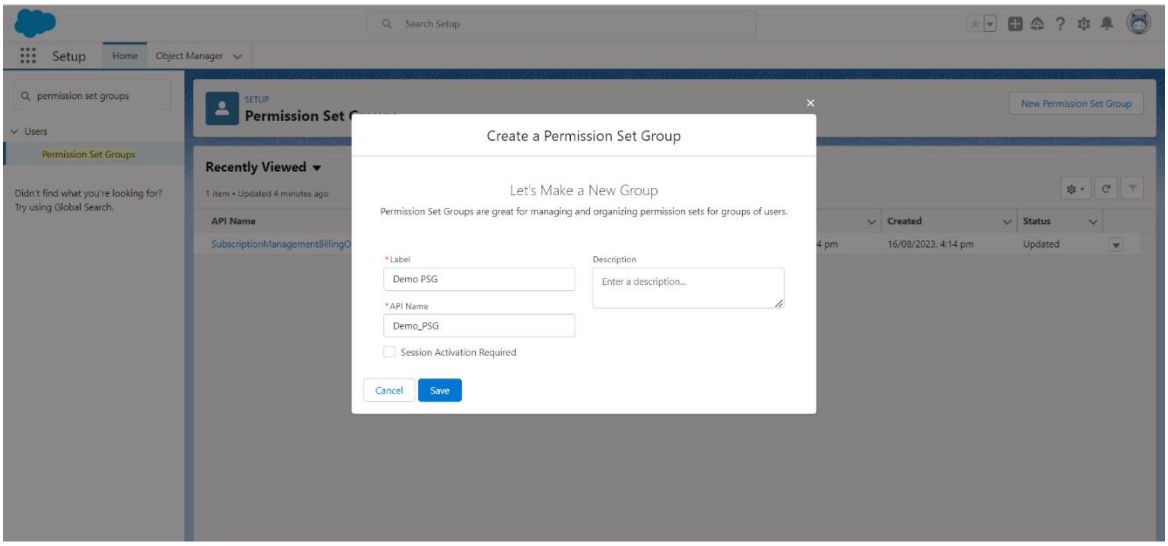
- After that click on save. Now demo one PS permission set is created.
- Same way creates demo two PS and give delete access. With delete access edit and read access enable automatically.



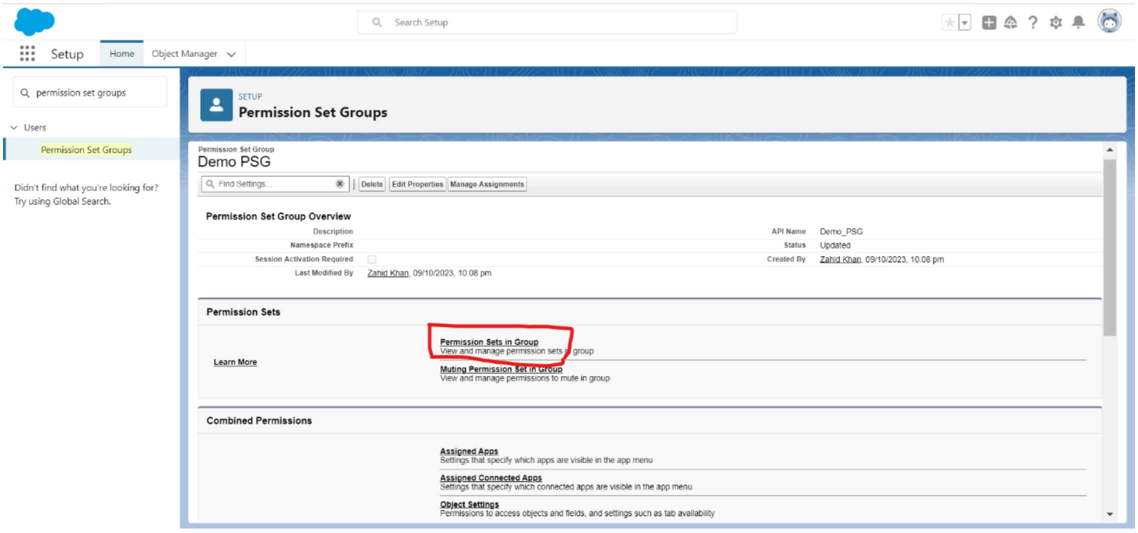
- After creating 2 permission sets. Search for permission set groups in quick search and click on it.
- After that click on new permission set group.



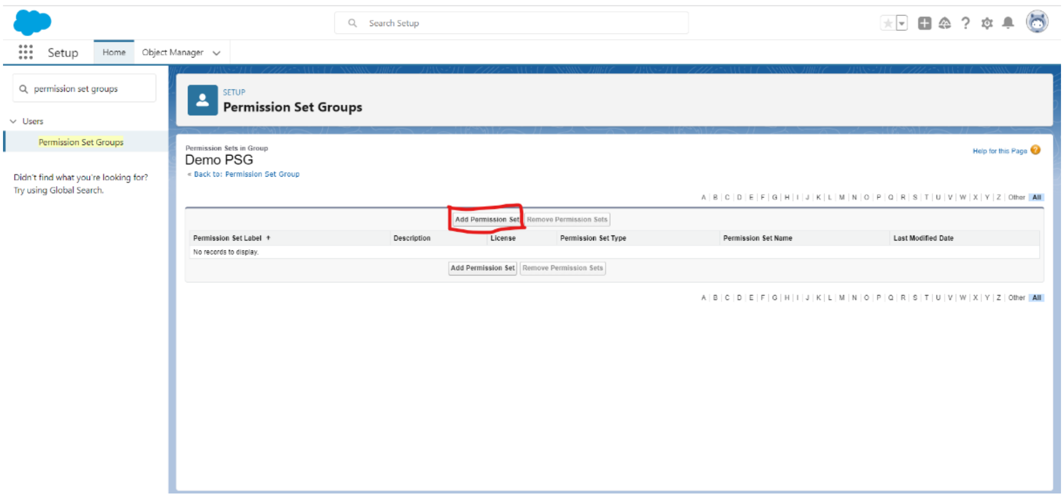
- After that enter the label name, description and click on save.



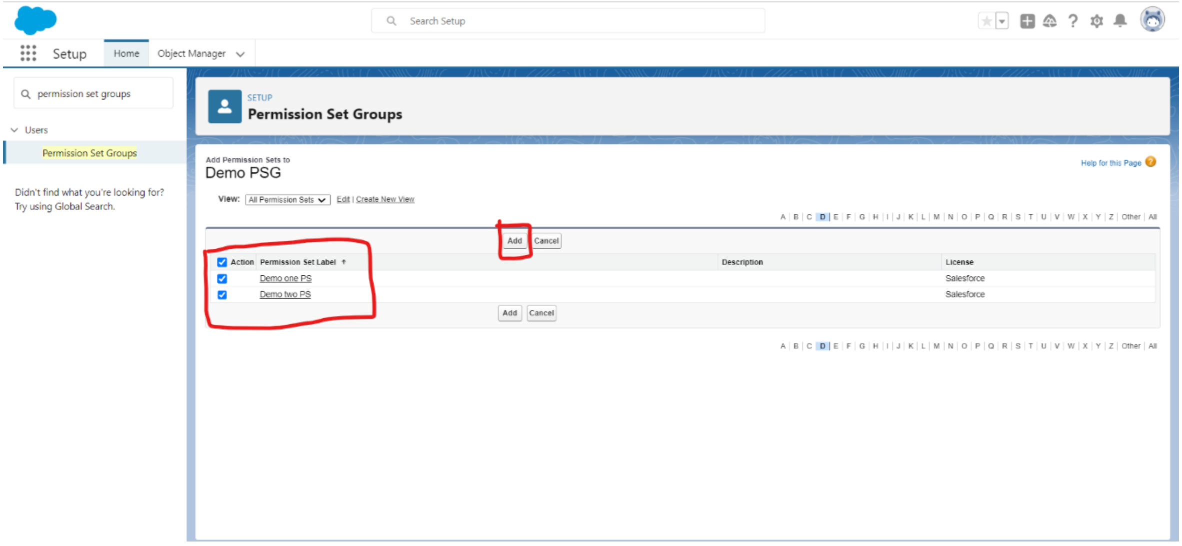
- after that new page will open. From permission sets click on **permission sets in group**.



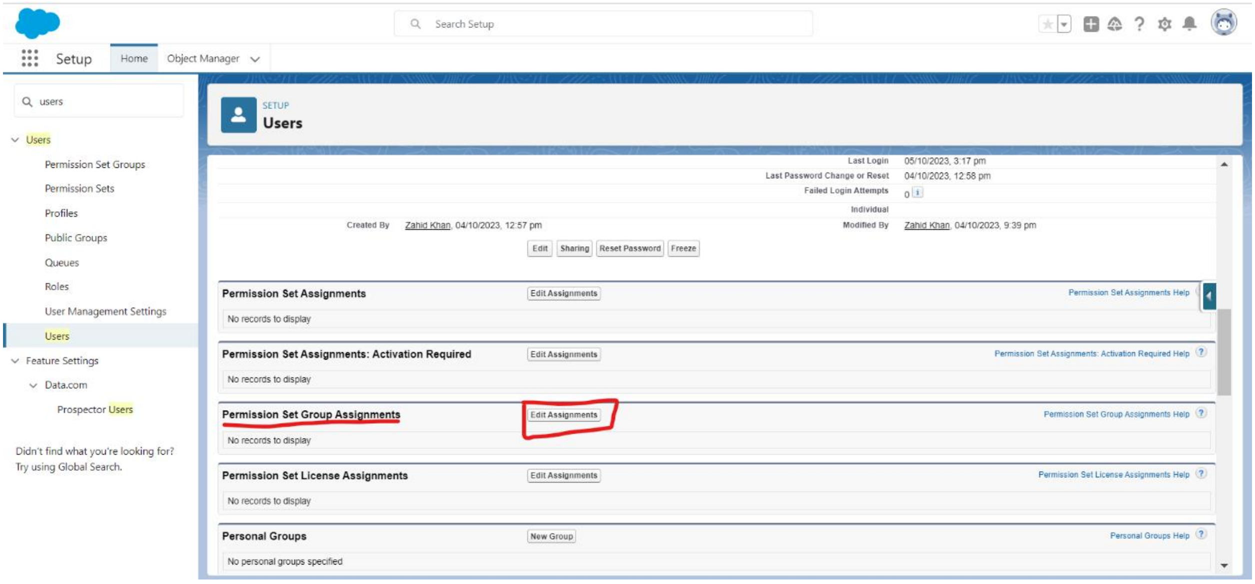
- After that click on Add permission set.



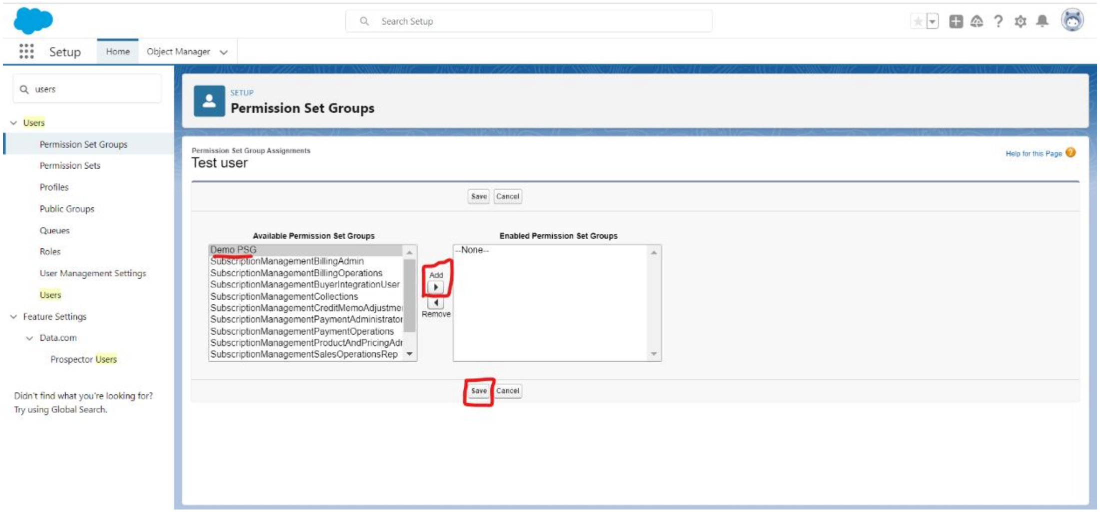
- After that search for created permission set and check the box beside permission set and click on Add. And click on done.



- 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.



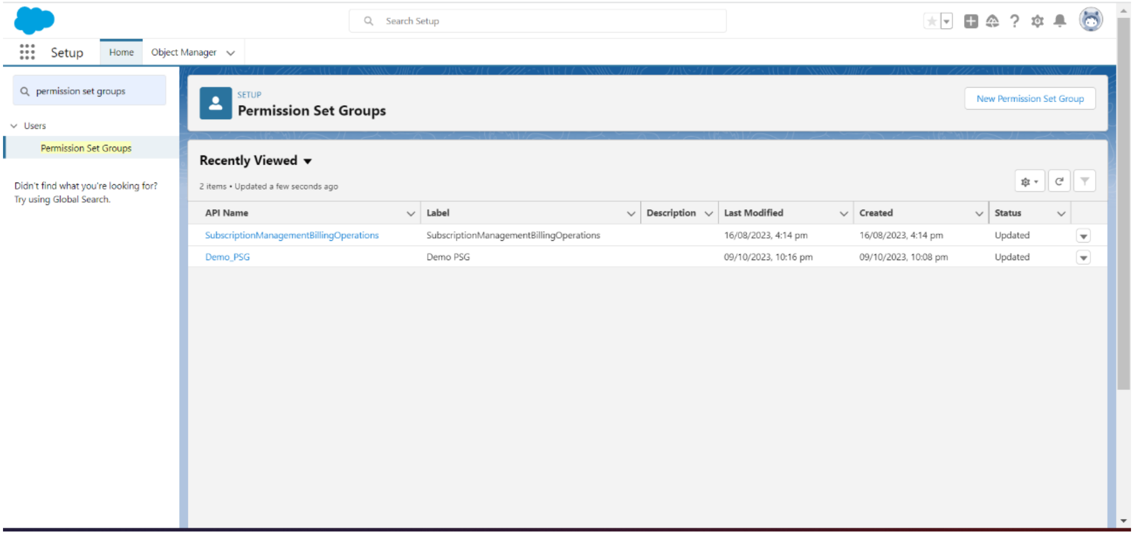
- now Permission set group assigned to the test user. Login test user in another browser and check the results.

What is MUTE in permission set group?

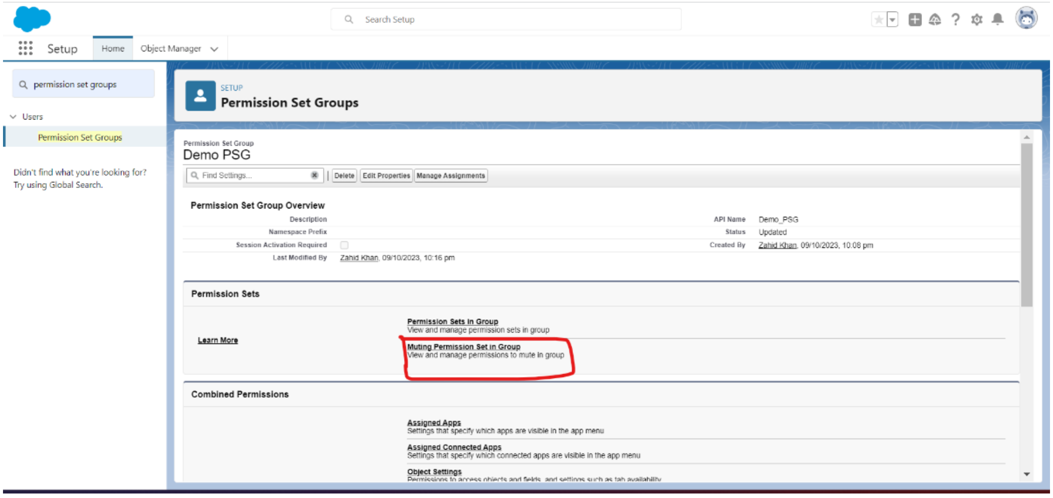
- One can mute some permission set groups so that they won't be given to the user.
- If you mute particular permission in permission set group then it won't impact individual permission set, they remain intact.
- You can anytime unmute the permission in permission set group.

Steps to enable MUTE in permission set group:

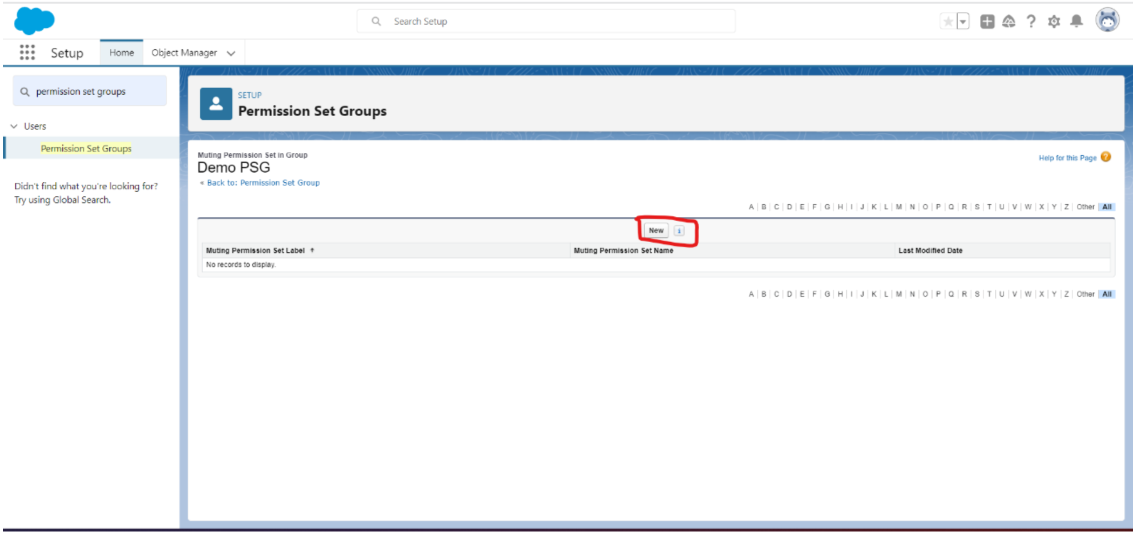
- For example, we have a requirement that we don't want to delete access to the test user so, instead of deleting it we can mute the delete access. After that user don't have access to the delete access.
- We are going to mute the delete access from demo two PS permission set through permission set group.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



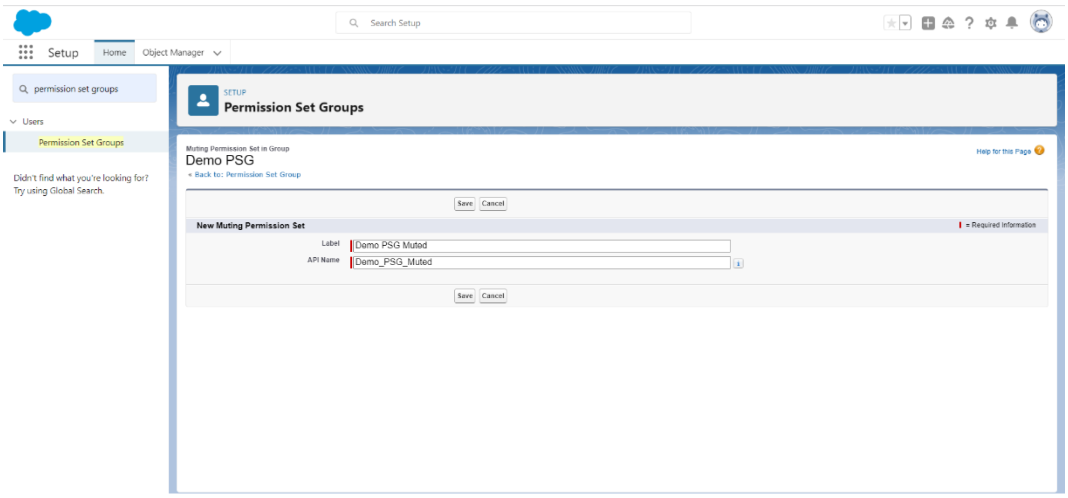
- After that click on permissions set group name e.g., Demo PSG.
- After that click on **Muting permissions set in group**.



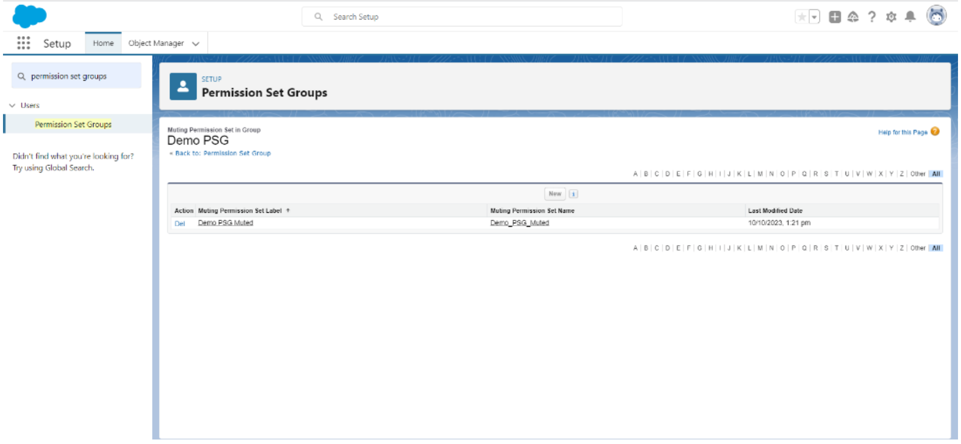
- After that click on New.



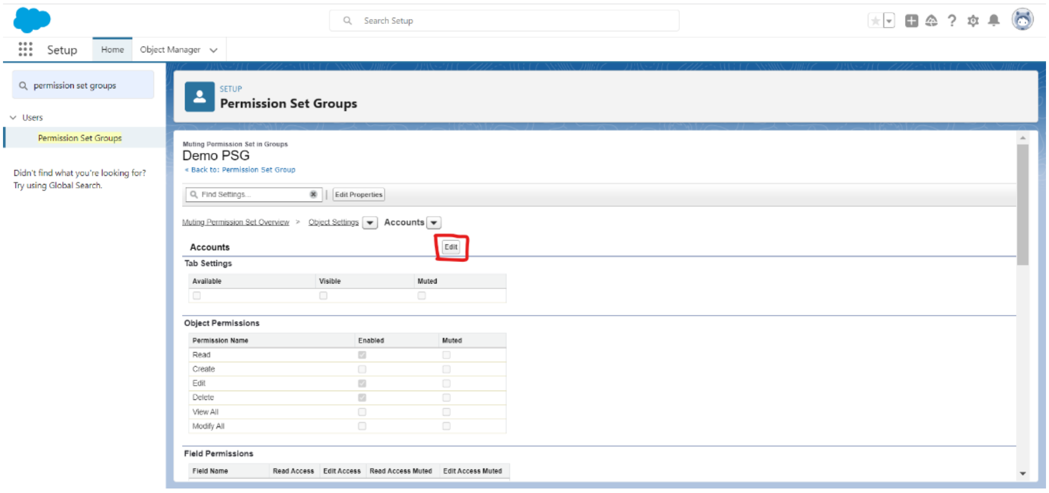
- After that enter the label and click on save.



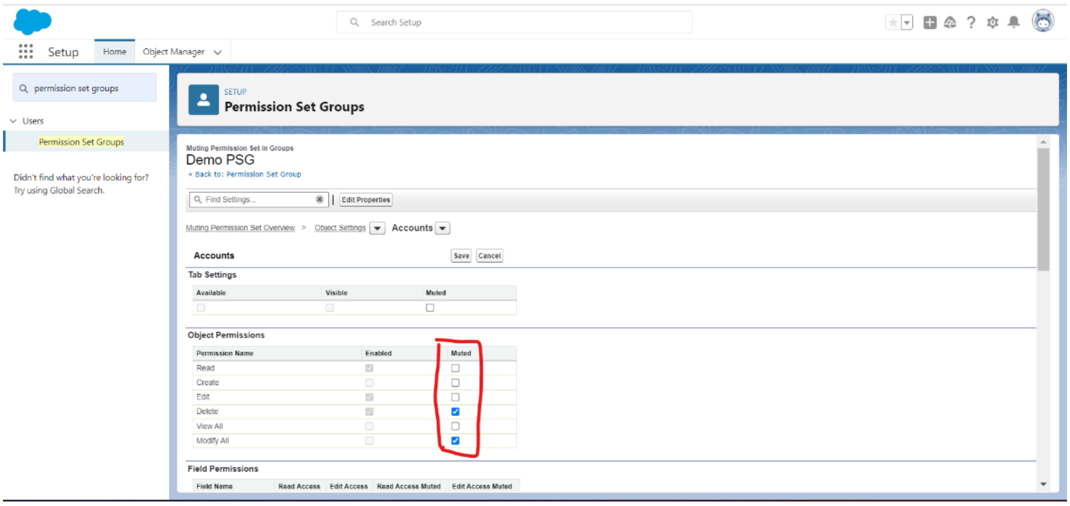
- After that click on newly created Muted permissions set.



- 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

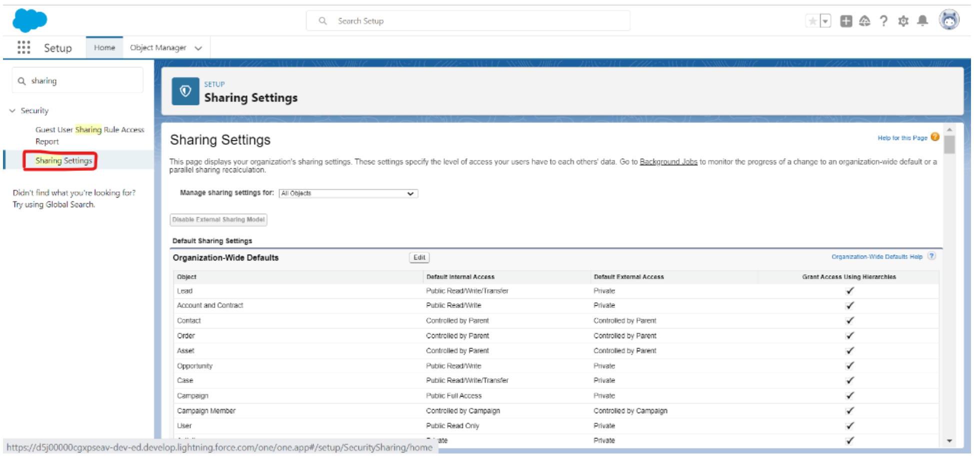
- You can restrict access to records for users, even If user has object level permissions.
- For example, a user can view his own records but not others.
- You can manage record level access in following ways:
    I. Organizational-wide defaults.
    II. Role hierarchies.
    III. Sharing rules.
   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

Organizational-wide defaults.

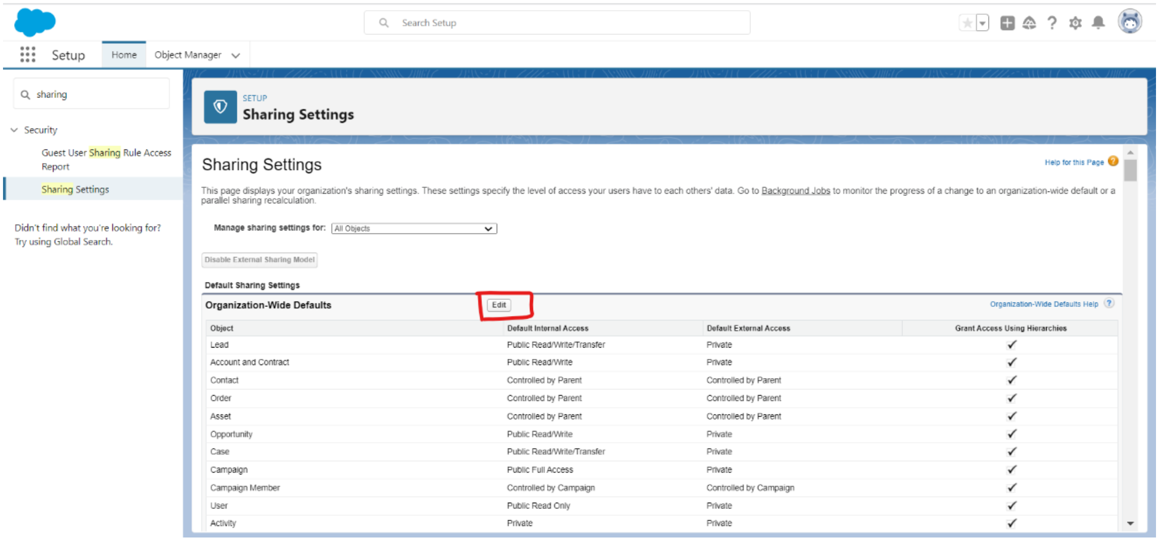
- If we want to restrict record access which means logged user can only see that records which is created by him/her not by other users. For this we have to apply organizational wide defaults.
- OWD specified the default level of access of records.
- Org-wide sharing setting lock down the data to the 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:

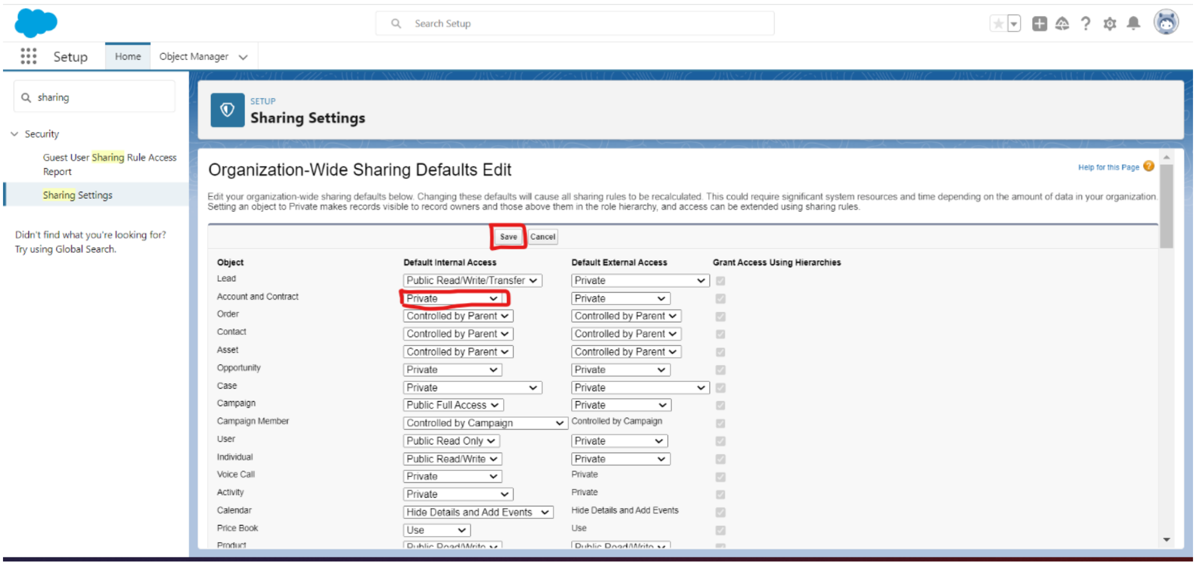
- Search for sharing settings in quick search box. And click on it.



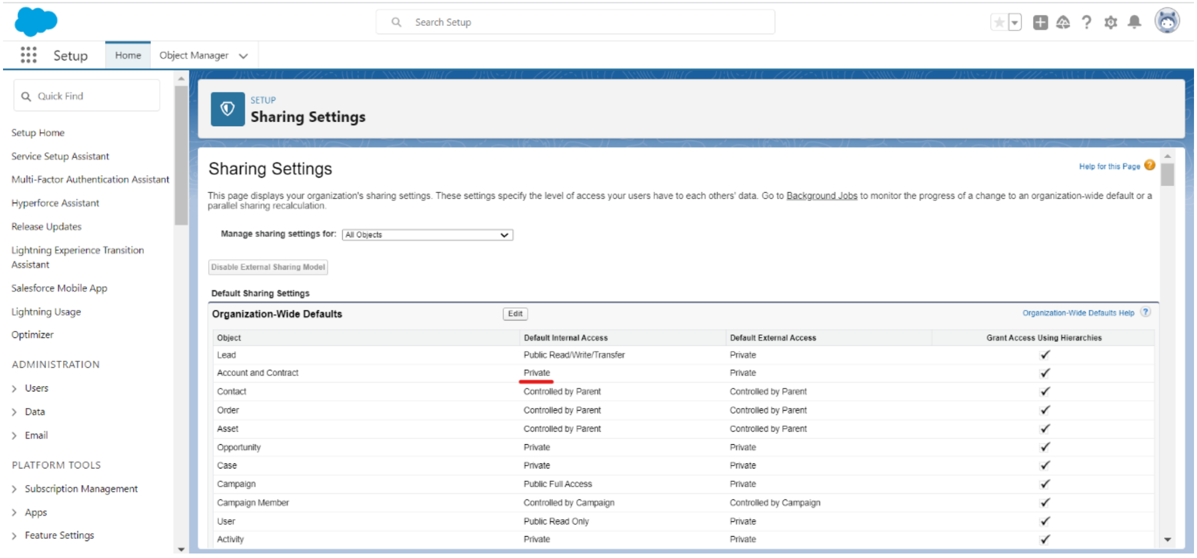
- In sharing settings, we can see organizational-wide defaults. In which we got all the objects with two option default internal access and default external access.
    1. The user which is created in our org. will be affected by the default internal access. Now we are focusing on default internal access.
    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.



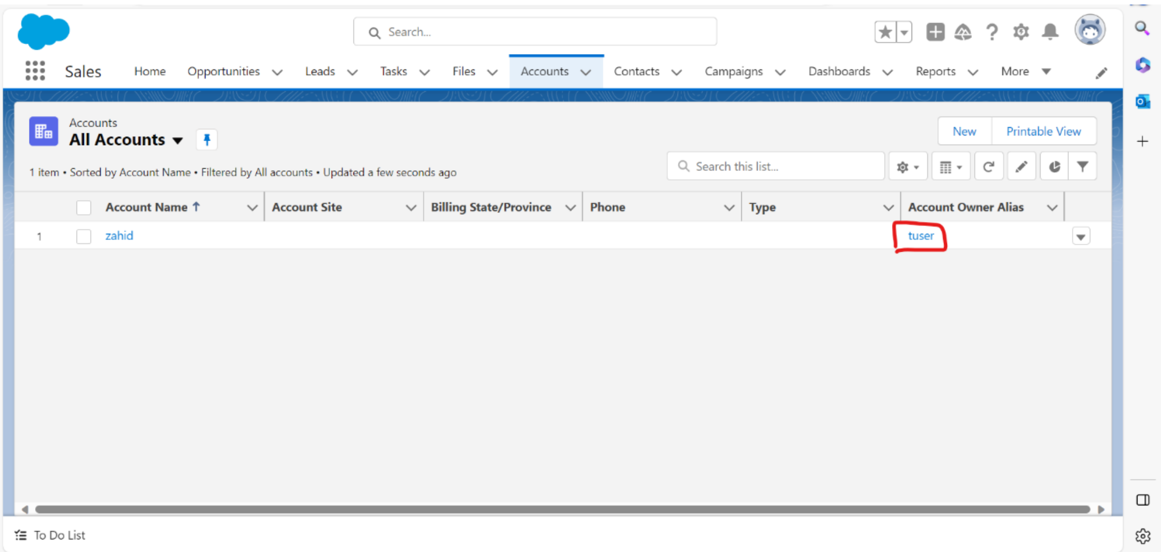
- In account and contact sections choose private option from drop-down and click on save.



- 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.



- 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.



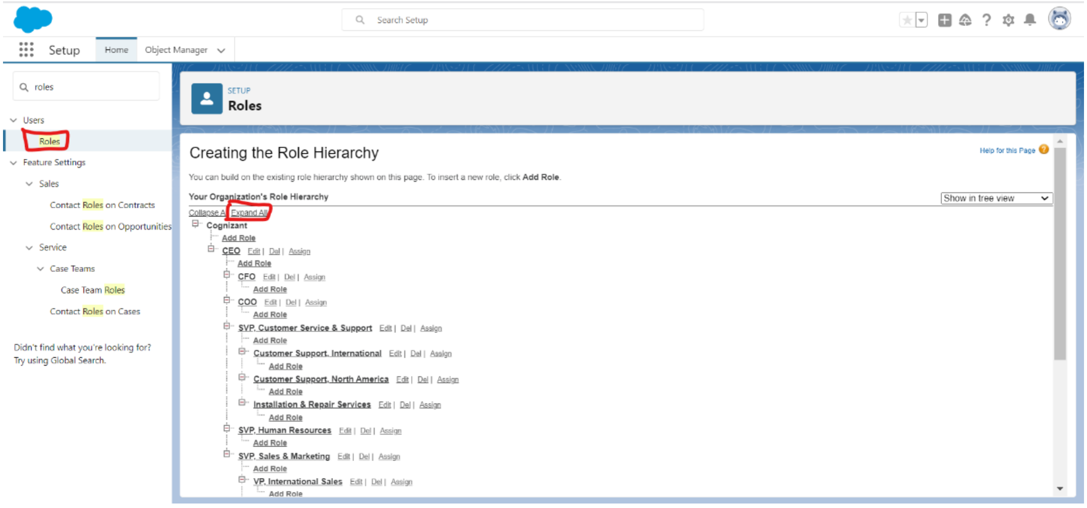
- System admin will see all the records, but test user didn't.

<u>**Role Hierarchies:**</u>

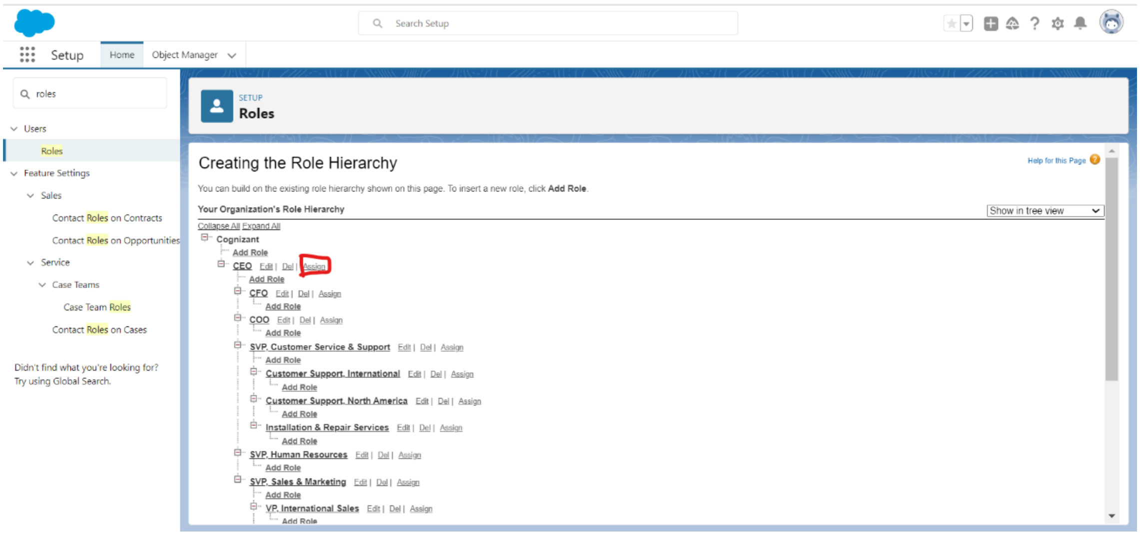
- Previously, we created OWD so that test user unable to see the records of another user. But we want to show the record which is created by system administrators for this we use role hierarchy.
- It gives access for users higher in the hierarchy.
- That user can access all records owned by the users 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:

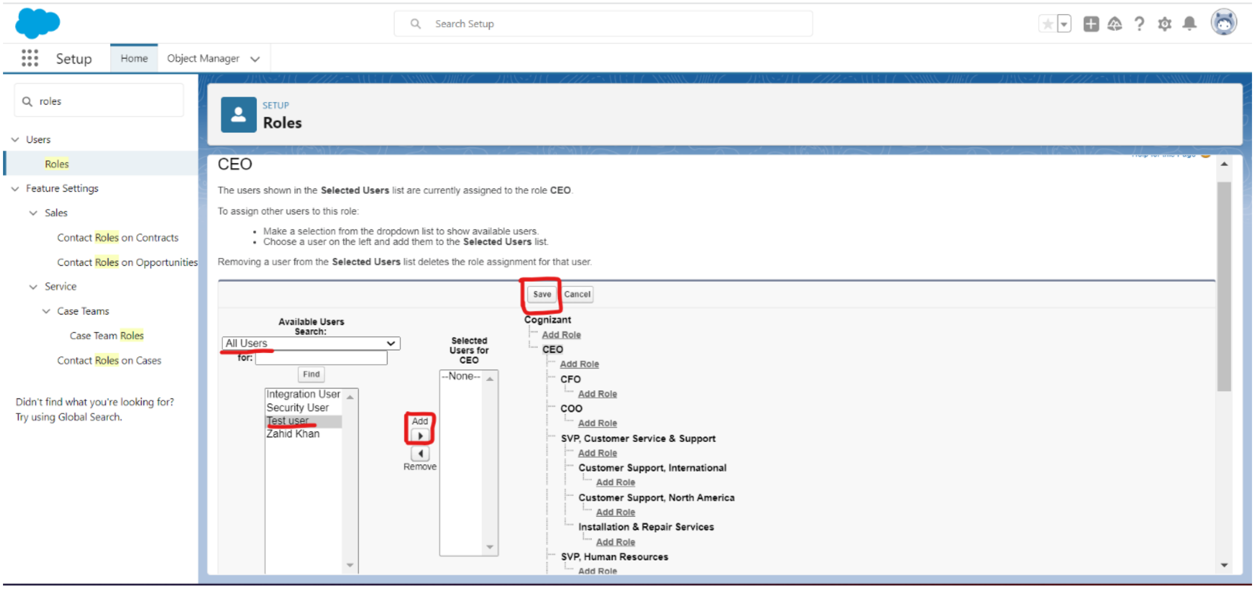
- Search for Roles in quick search box and click on it. After that click on expand all so that will see all the roles.



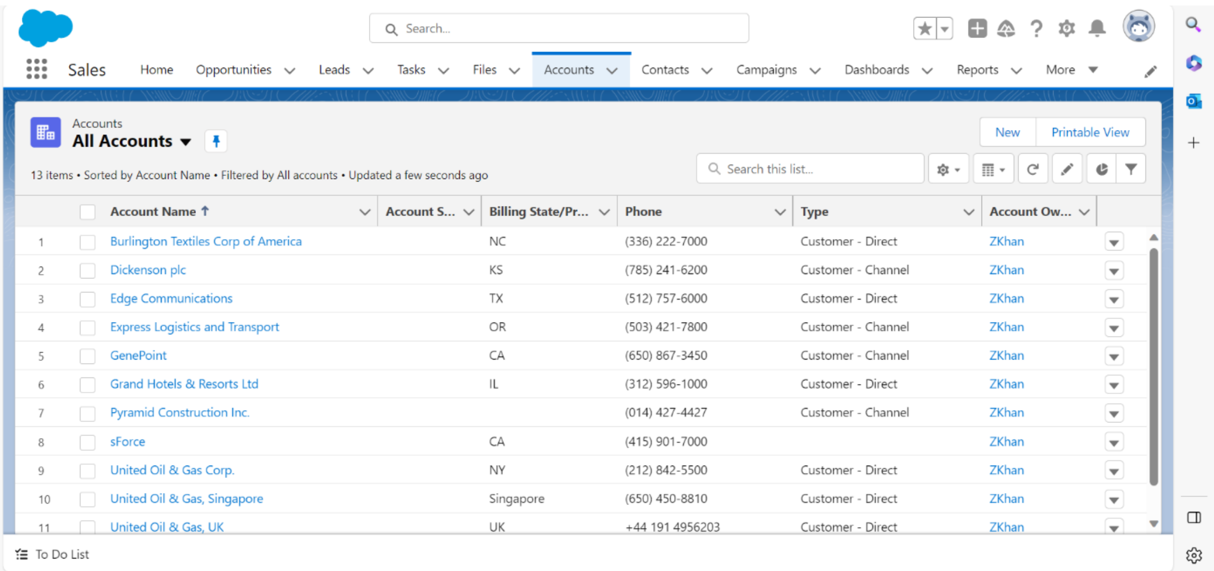
- Here, we can see all delete, Edit, and assign option with users and we can add Role under any role with Add role options.
- Every higher role will see the records of their below role. Like, CEO can see the records of all the role which is below them. We can also create hierarchy under any role.
- Here, 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

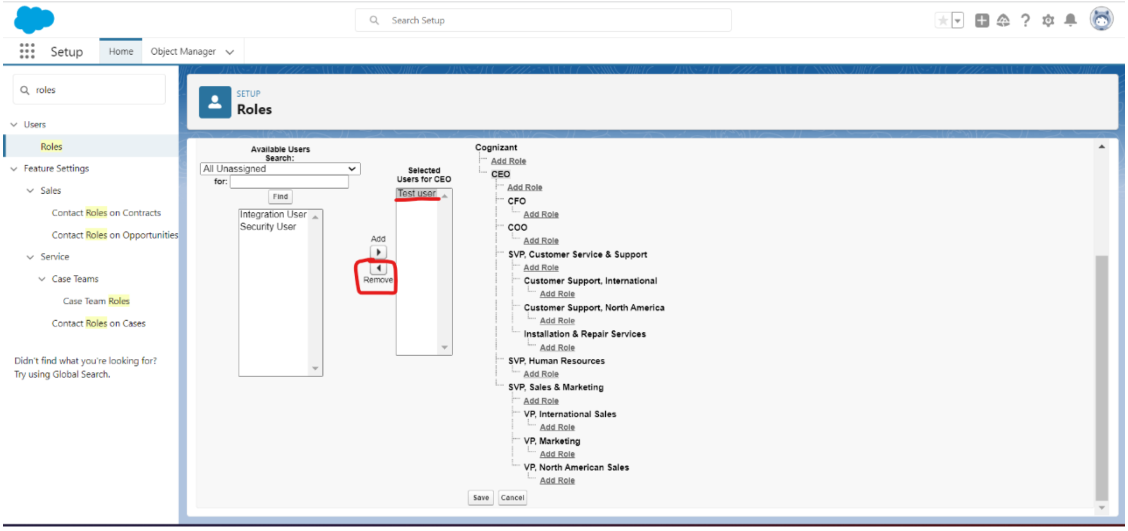


than CFO.

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.

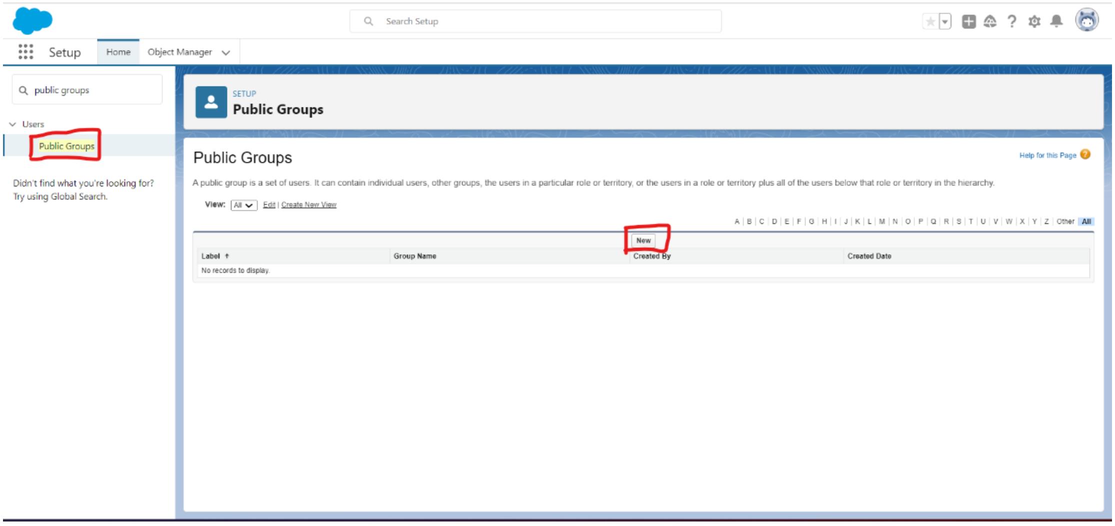
- Before making the sharing rule we have to unassign the test user from CEO and system administrator from CFO. Because we have only one user in free license account. For this again click on assign and select the user and click on remove



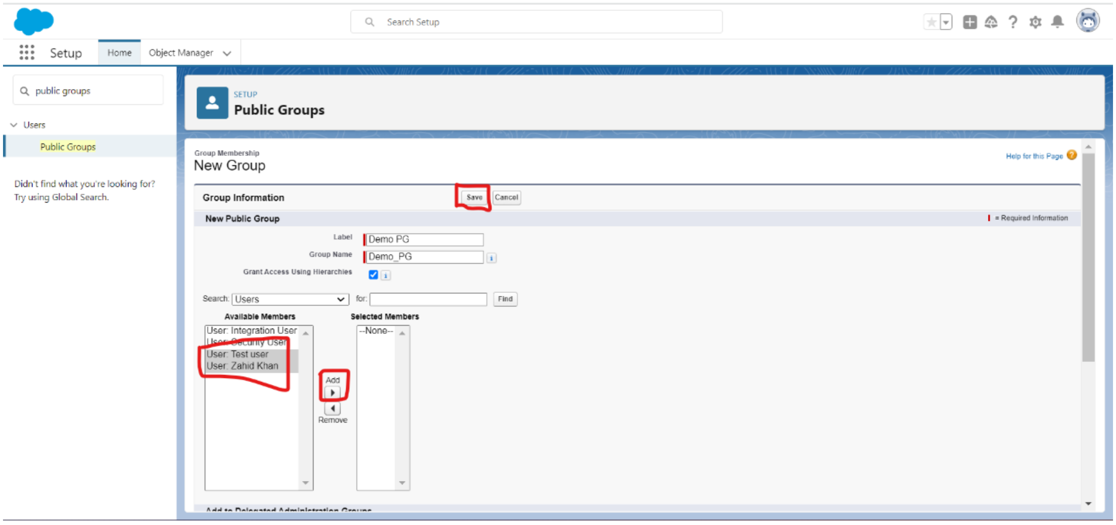
button and save.
- Same way unassigned system administrator from CFO. And check in test user by log-in it that it unassigned or not.

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

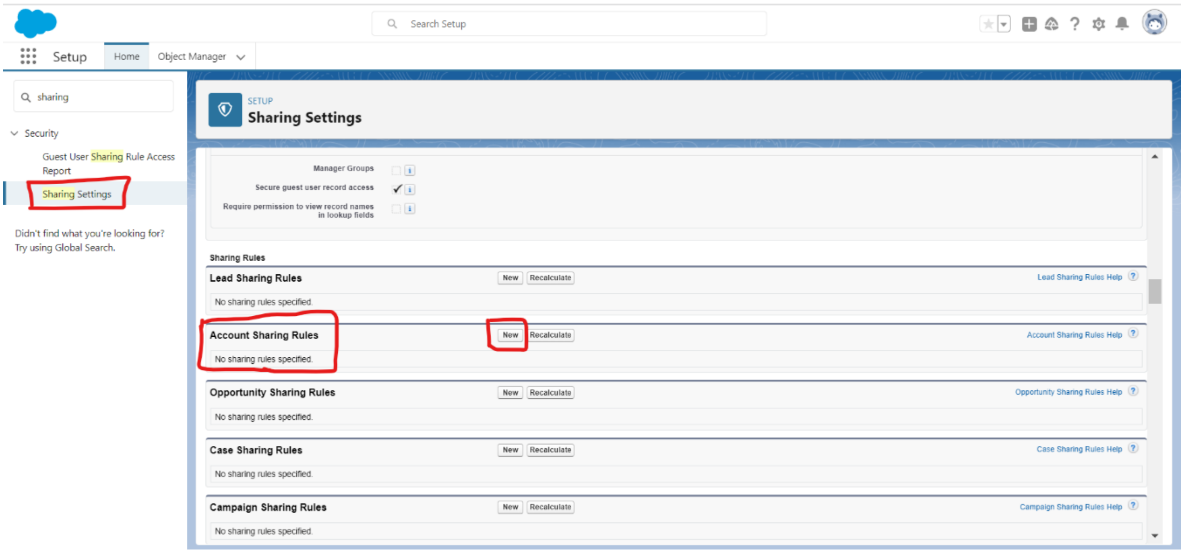
- Before creating sharing rule, we have to create a public group. For this search for **public group** in search box and click on it. After that click on new.



- 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.

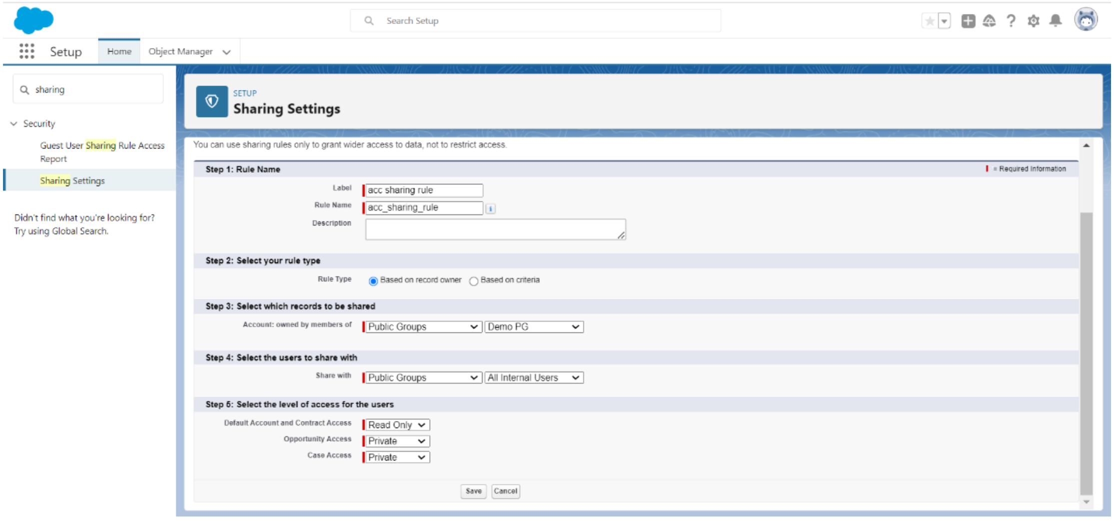


- After that we will create sharing rule.
- Search for **sharing settings** in quick search box. And click on it.
- After that scroll down so we will get all sharing rule of all objects. Here, we are taking example of account object.
- After that click on new.

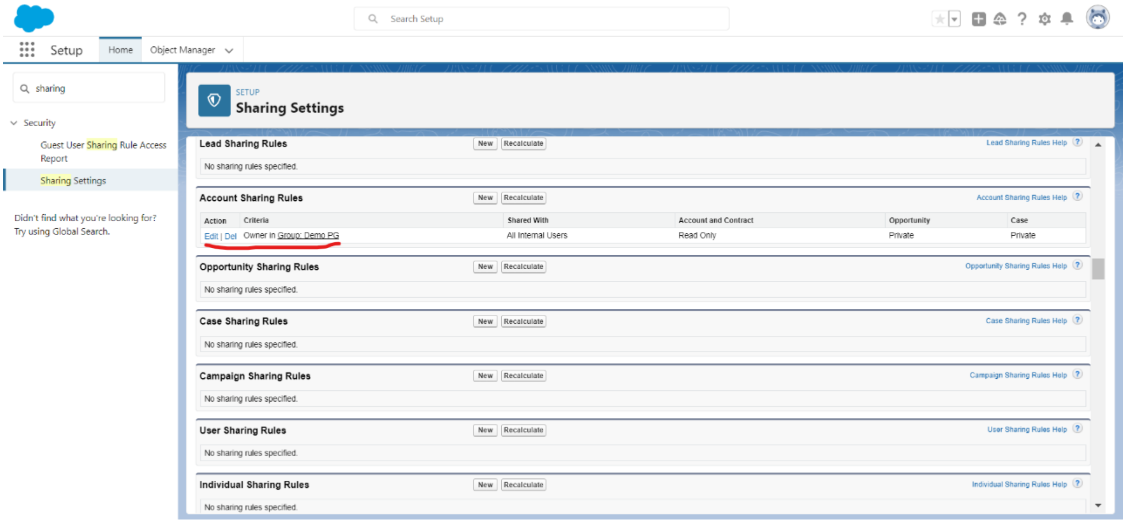


- Now we get 5 steps 1st to enter label name and Rule name.
- 2nd steps select your Rule type which contain 2 options **based on record owner** and **based on criteria**. Here, we are selecting **based on record owner** option.
- 3rd steps **select which records to be shared** which means the record 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.

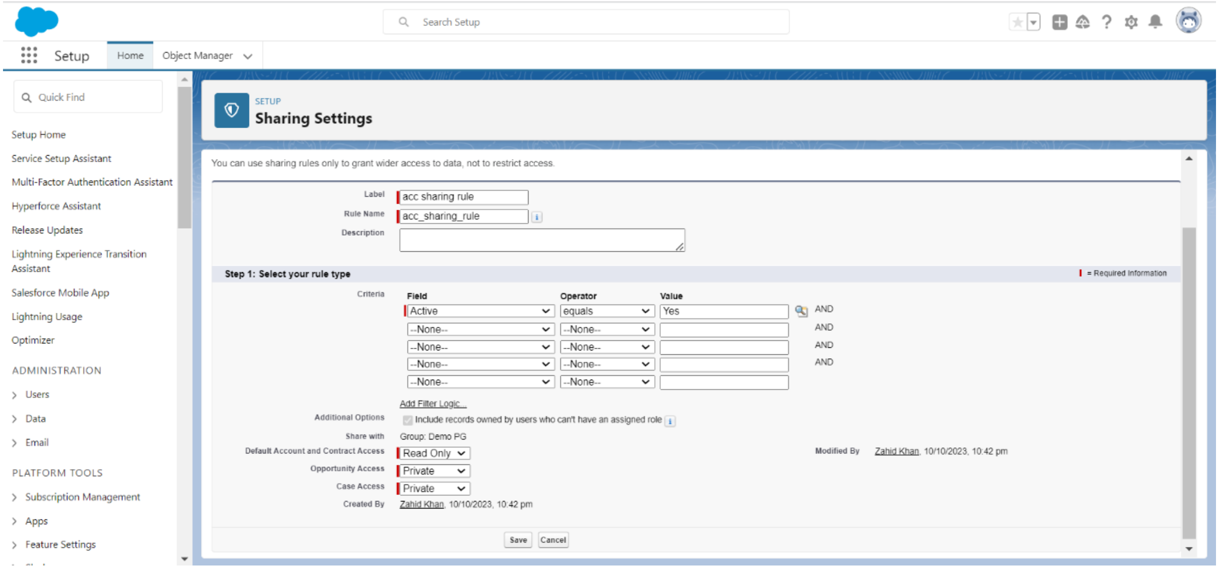


- Now go to test user and test the result. We will see all the records in test user because we add the system administrator and test user in same group.

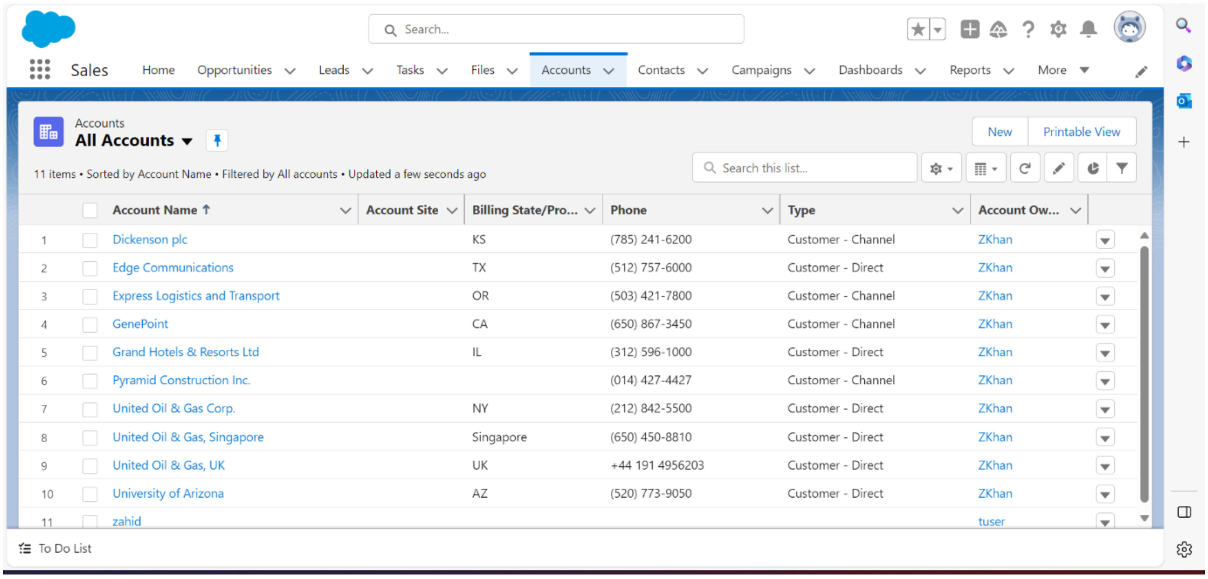
<u>Steps to create sharing rule (based on criteria):</u>

- 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.



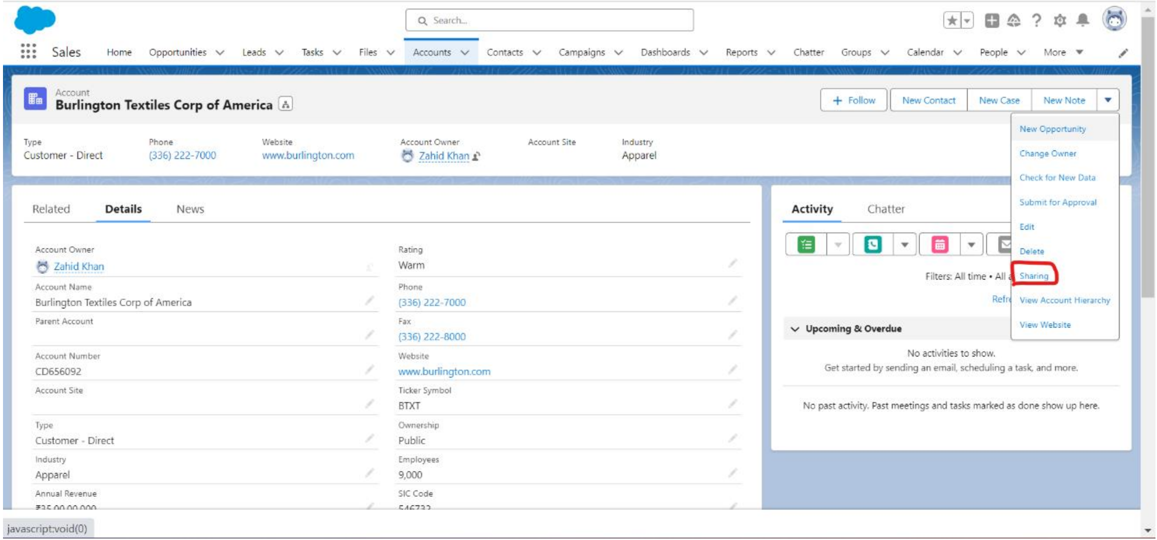
Manual sharing rule:

- 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.

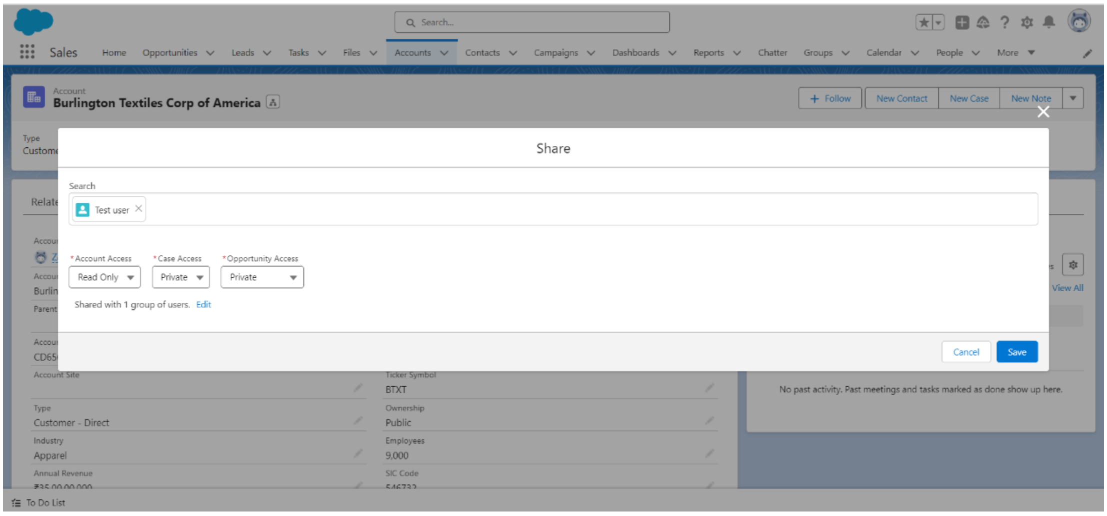
- If the user doesn't have access to the report and we share report by manual sharing rule so that user can see those records.

Steps to create manual sharing rule:

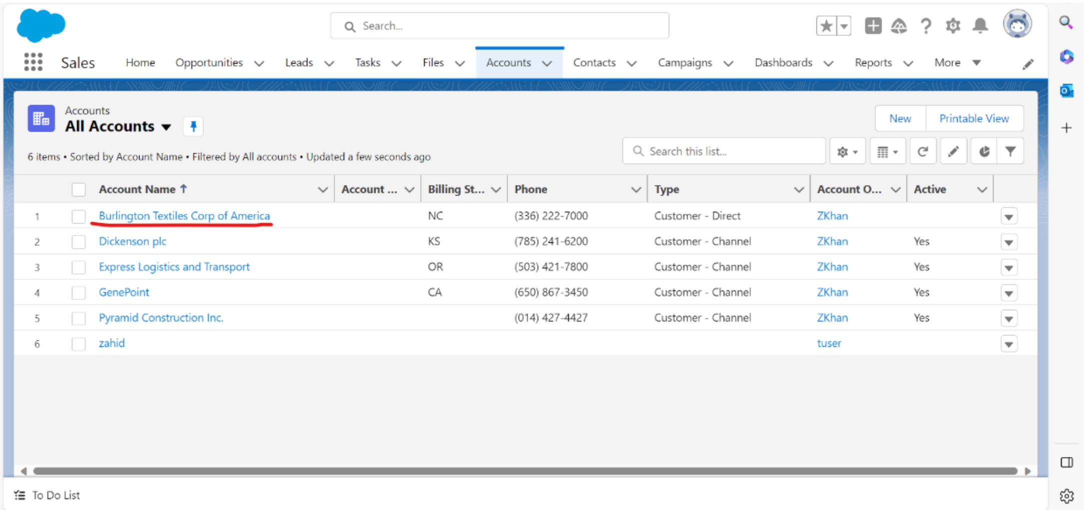
- Manual sharing rule will work in front-end of the App.
- For example, we are taking example of account object in sales app.
- Click on Account object and open any records.
- After that click on drop-down arrow at right hand side. And click on Sharing.



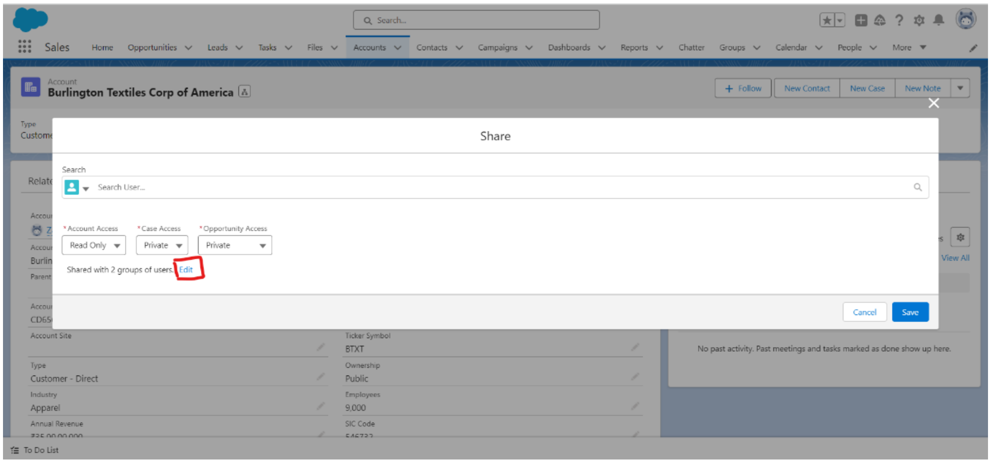
- After that share pop-up screen will open. We have to enter the user's name of the user to which we want to share these records.
- Here, we are taking the example of Test user because we have only test user in free account.
- We can also provide read/write access of those records.
- After that click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



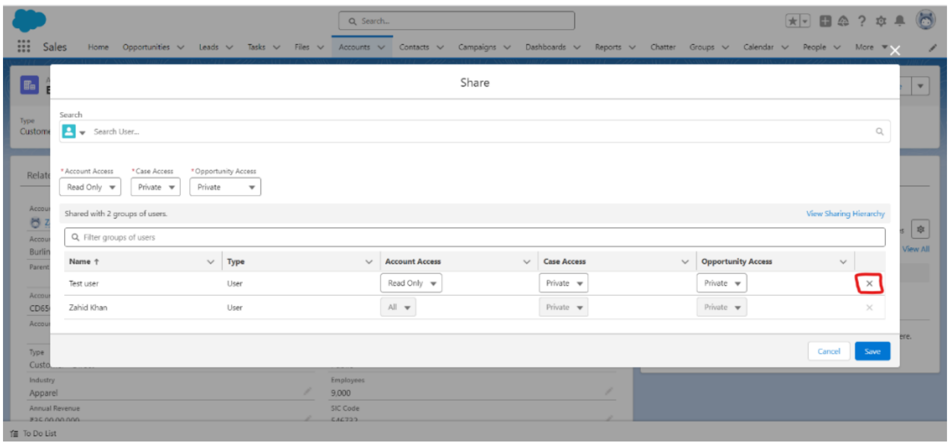
- Now log-in test user and check the result those records will share with test user.



- 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.



- 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.



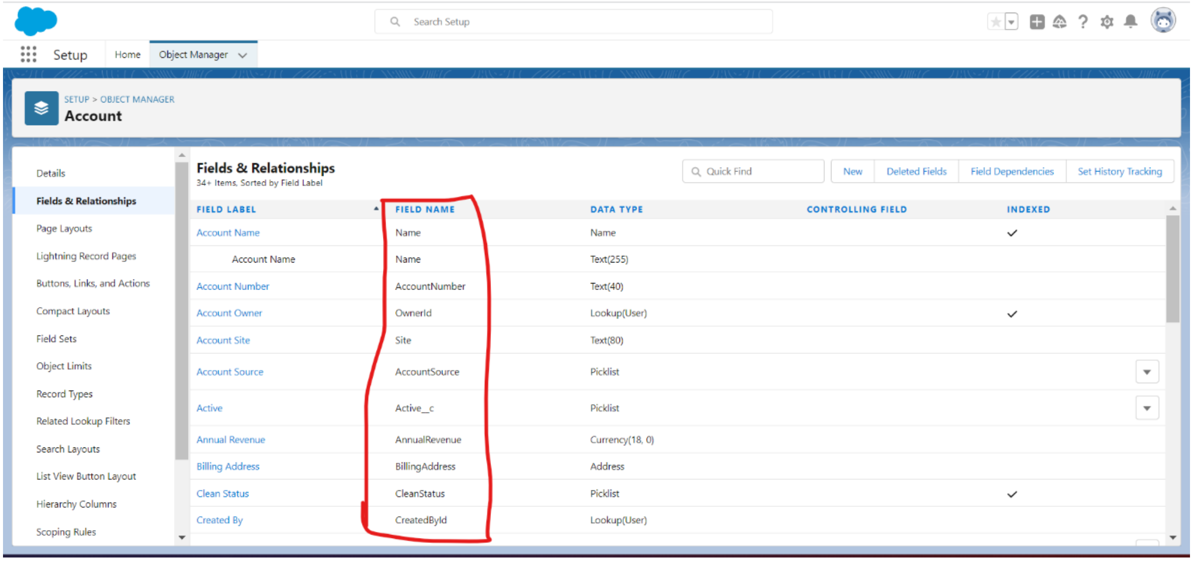
Day-13

Data import wizard

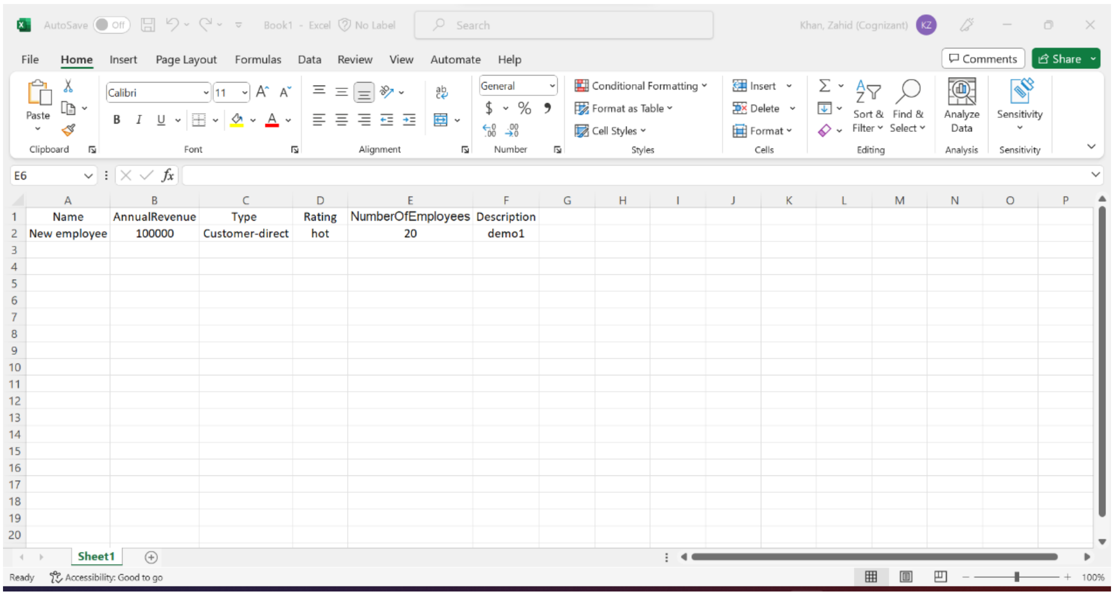
- It helps to import data from excel/csv format into salesforce.
- One can find this in setup.
- One can import up to 50,000 records at a time.
- One can perform insert, update, & upsert operations.

Steps to create data import wizard (insert):

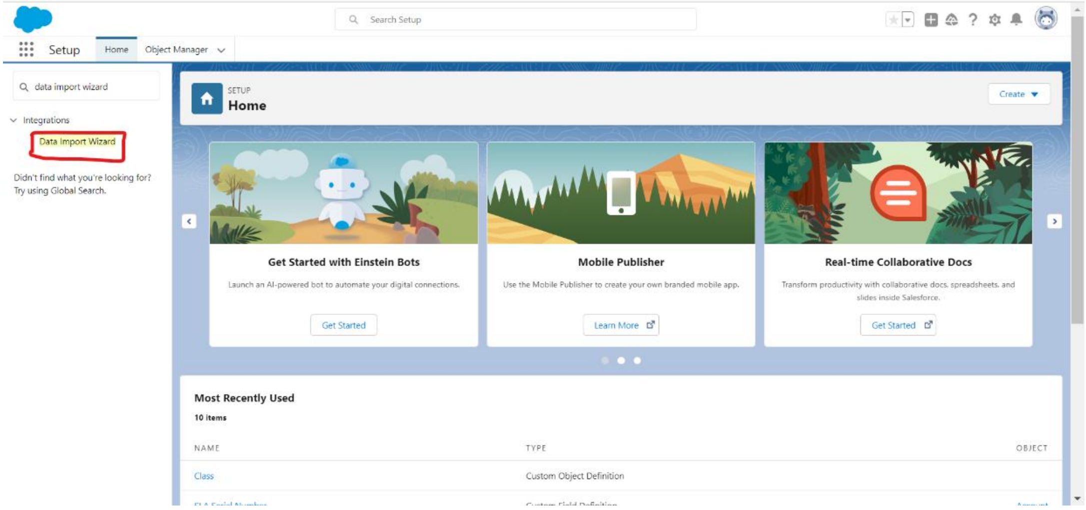
- First of all, create a record of the field in a excel file which we want to insert from the computer. Always use record name in excel.



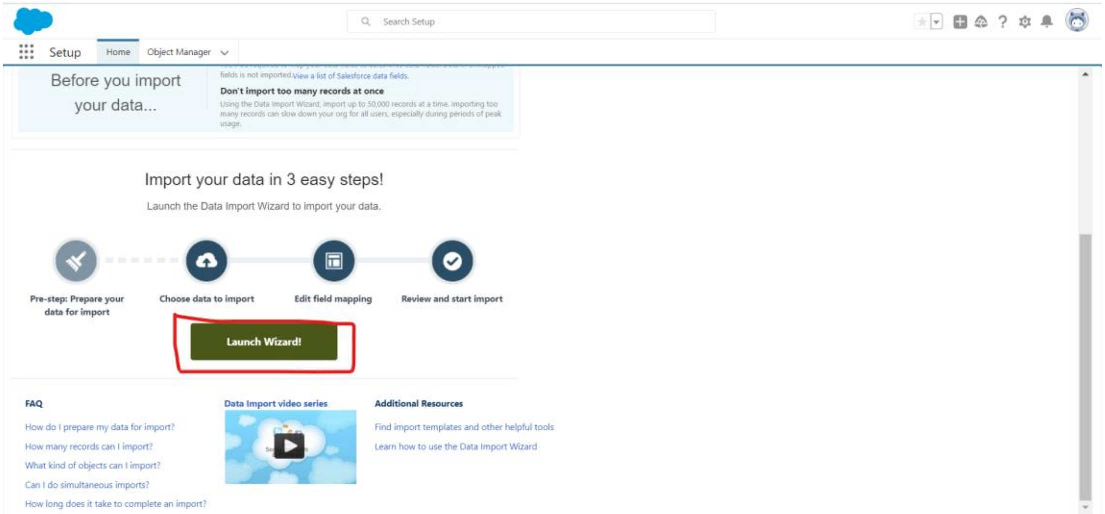
- Like, below we can create number of records in excel file and import it in our org. but data import wizard imports up to 50,000 records.



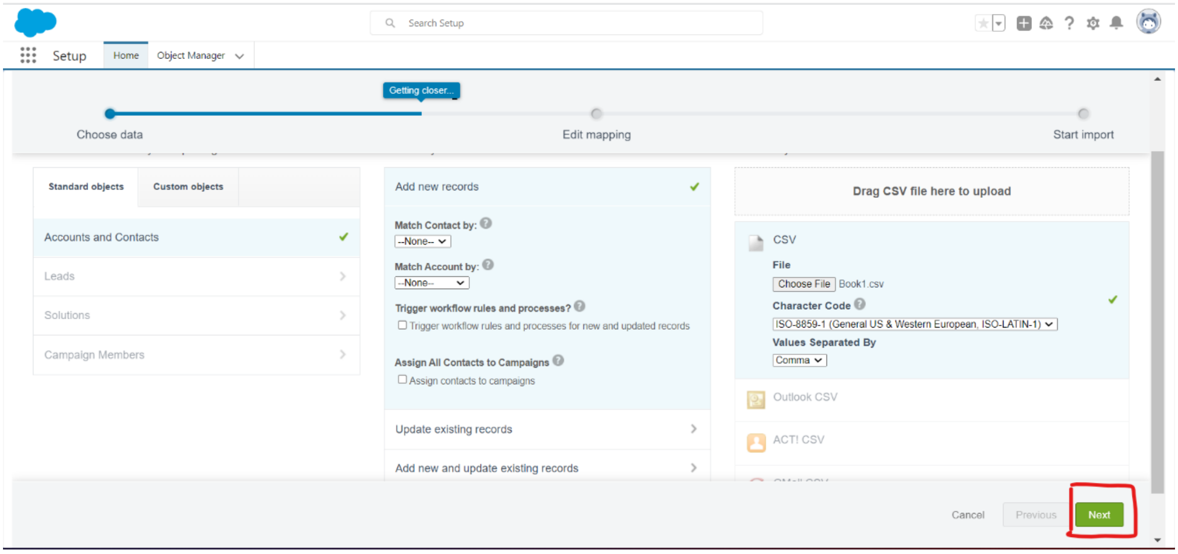
- Now go to set-up and search for **Data import Wizard** in quick search box. And click on it.



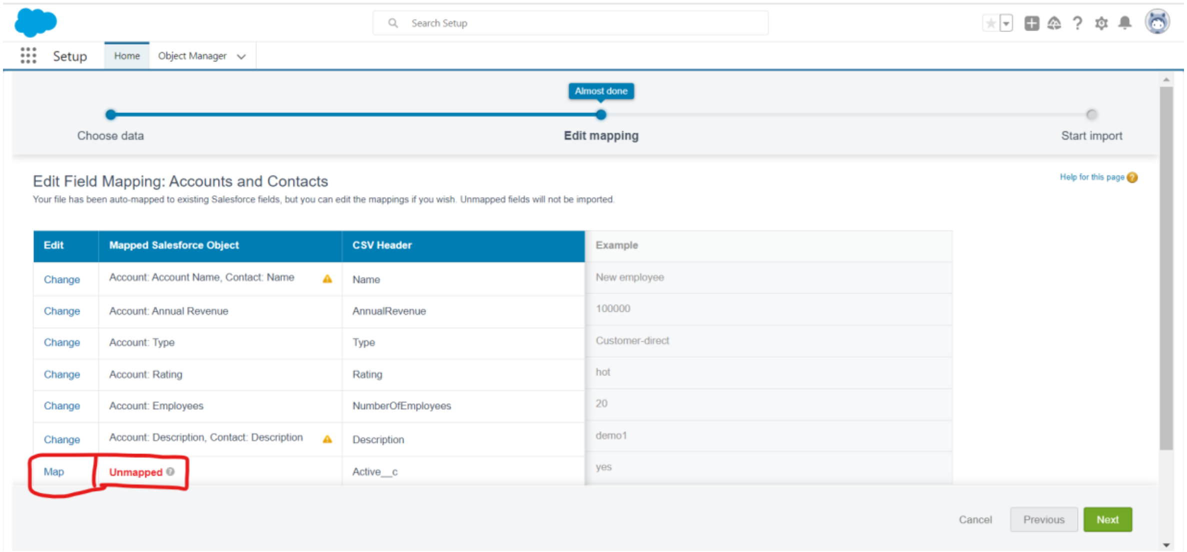
- Scroll down and click on Launch wizard.



- After that **import your data into salesforce** window will be open. In which we got 3 options.
    1. **What kind of data you are importing?** In this option we got standard and custom object list.
    2. **What do you want to do?** In this option we got 3 options insert, update and upsert (insert as well as update).
    3. **Where is your data 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.

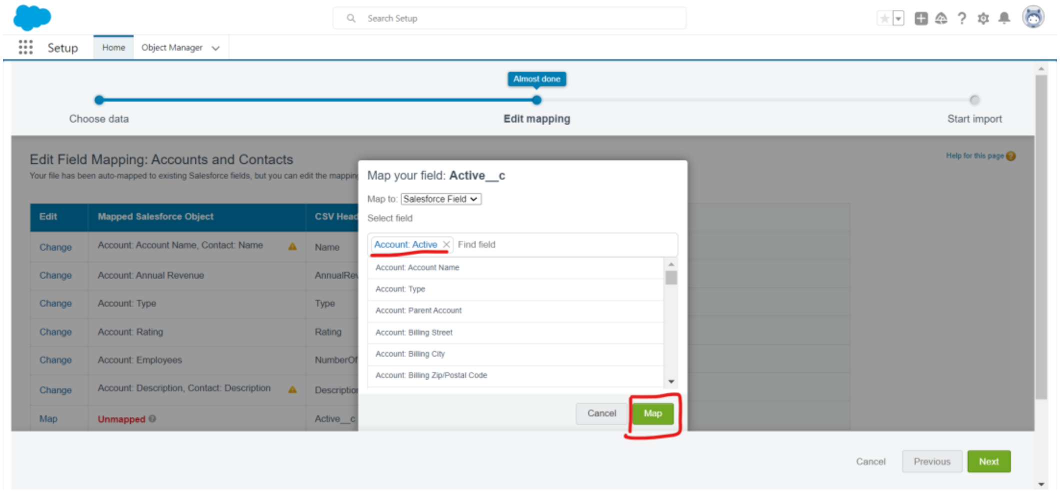


- After that we have to do mapping of excel file records with object field heading. Mostly it will be mapped if not then we get map option in edit field.
- In below image we can see that active field is not mapped so we have to map by clicking on Map option in edit column.



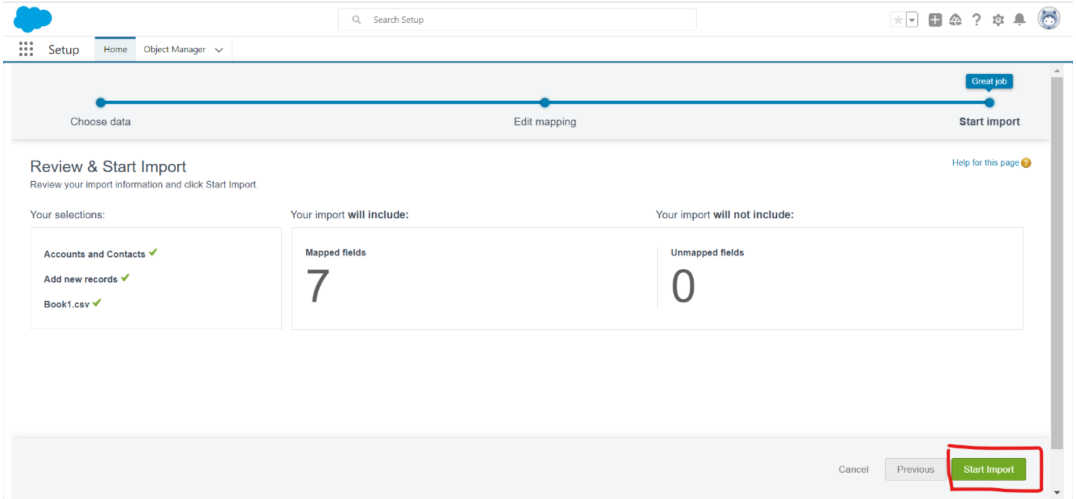
After that search for field in which we want to map that unmapped field. Here, Active filed is unmapped so we have to search for Active.

- 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.

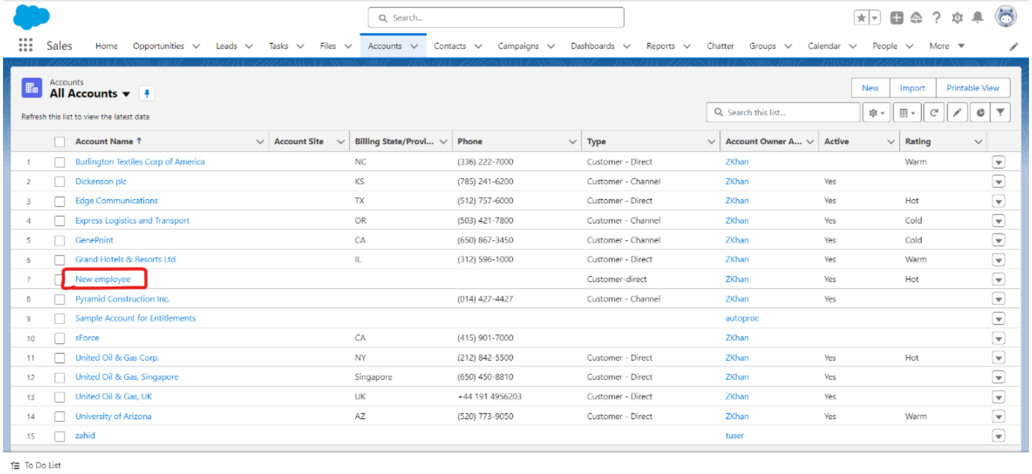


- And click on Map.

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

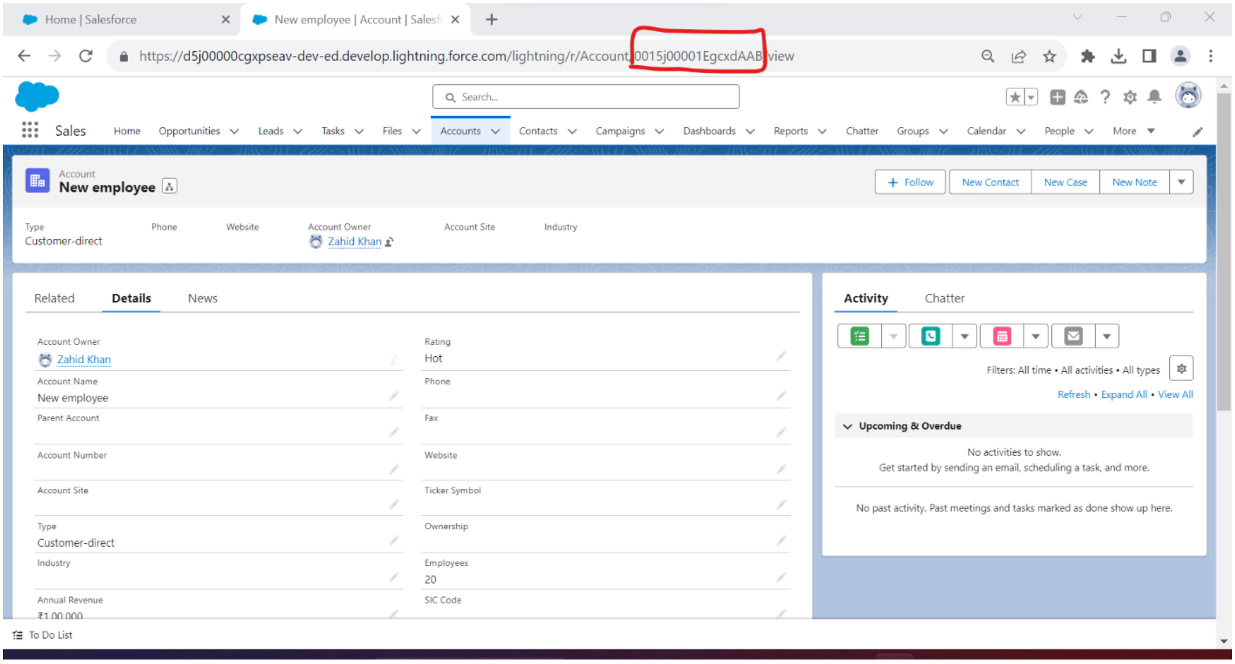


- After that go to front-end of the sales app and click on accounts object. We will see the records which we import.

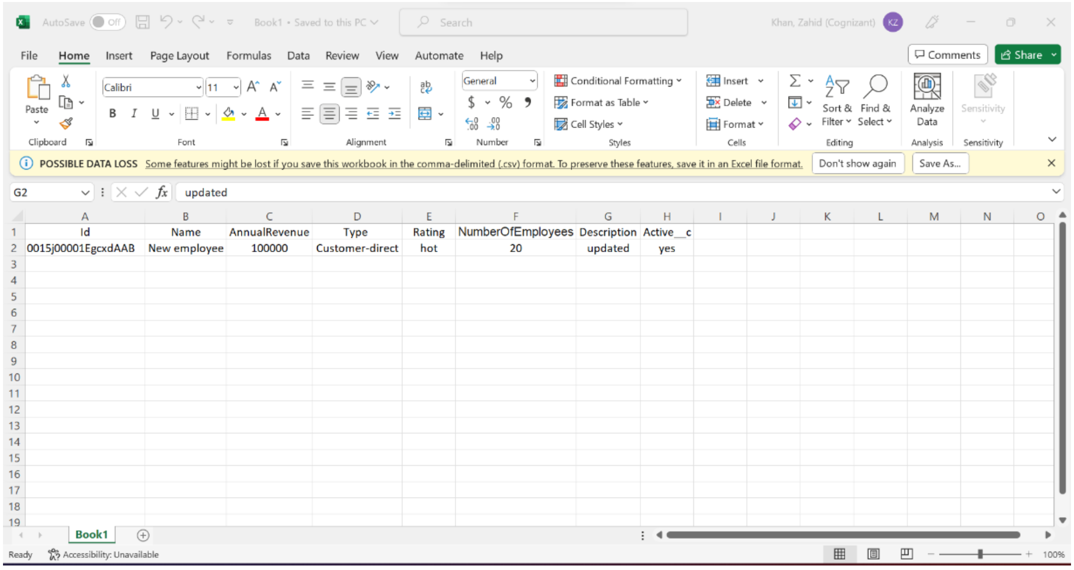


<u>Steps to update data import wizard:</u>

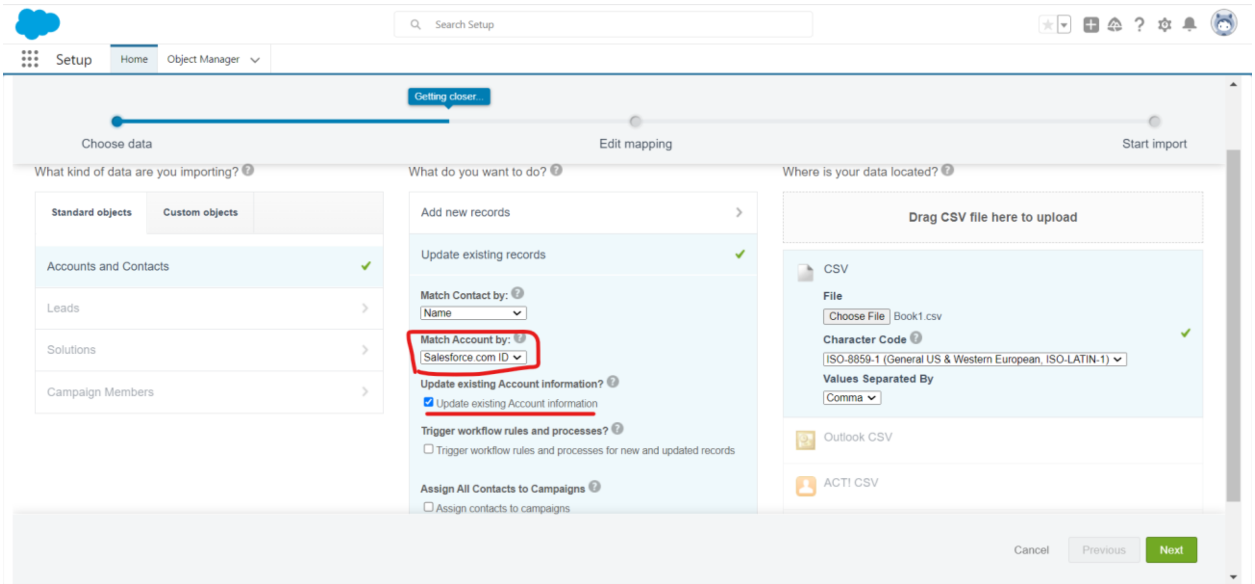
- To update a record through data import wizard we have to get the id of the existing records.
- To take the id of the records open that records which imported and want to update. And copy the id from address bar.



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

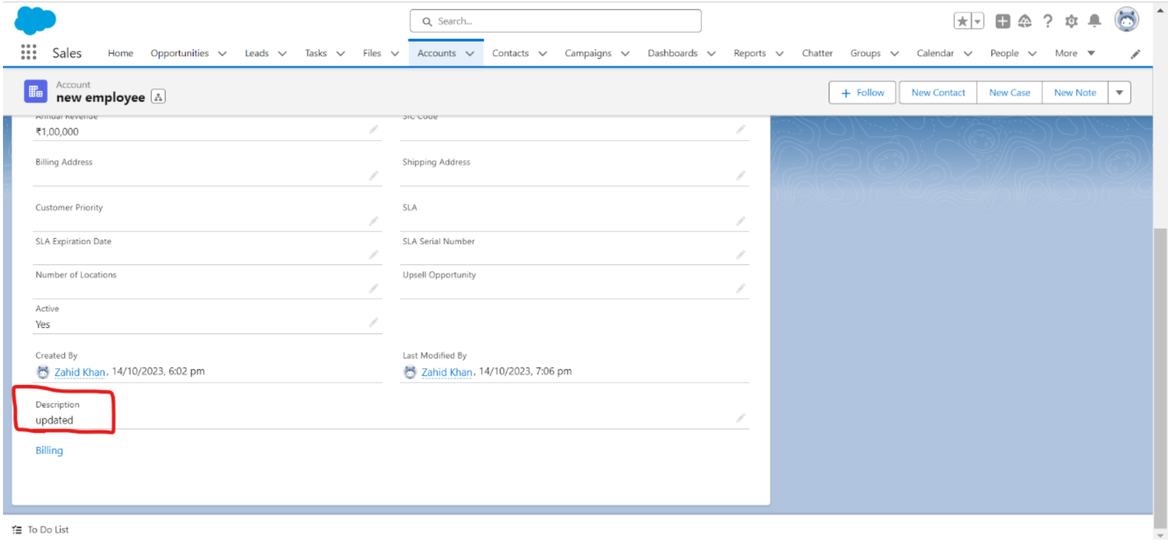


- Now go to setup and search for **data import wizard** and click on it.
- After that again click on launch wizard.
- After that select Account object because we are taking example of account object.
- After that click on **update existing records**. And select **Match Account by Salesforce.com ID.** 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.

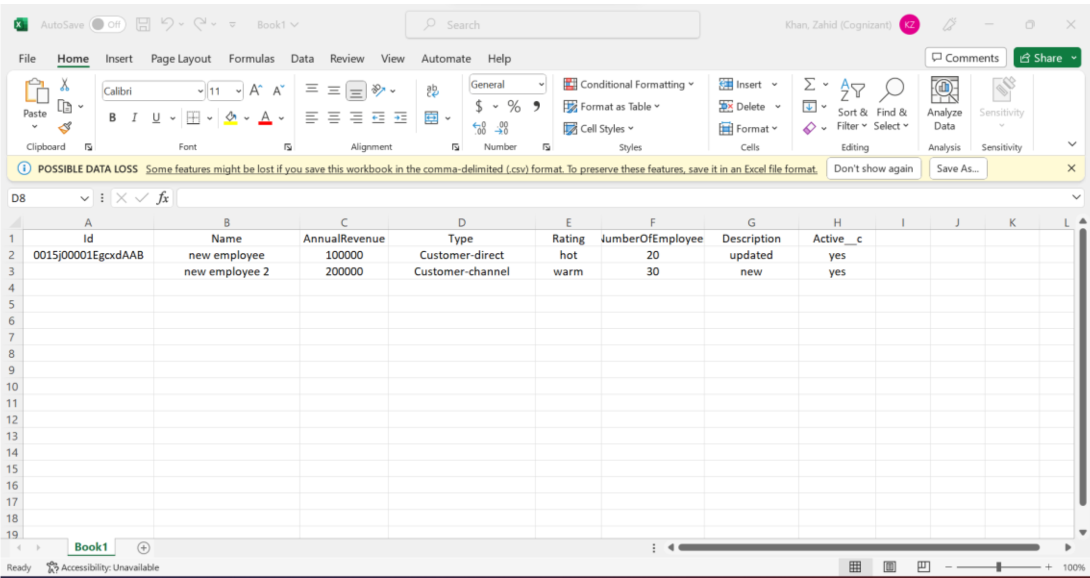
- Go to front-end and check the results.



- Now records are updated.

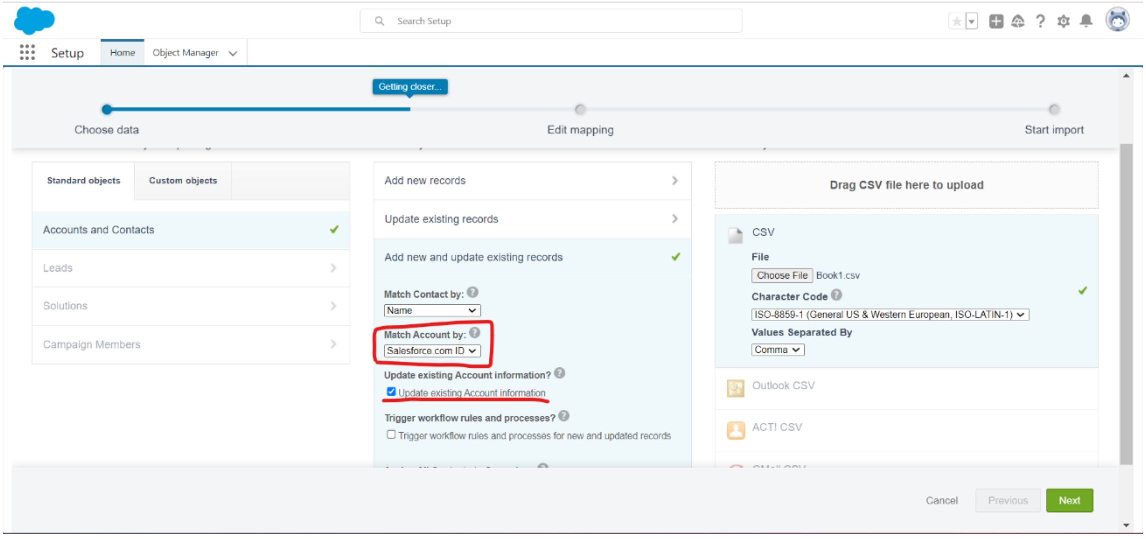
<u>Steps to upsert (add new records & update existing records) the records:</u>

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



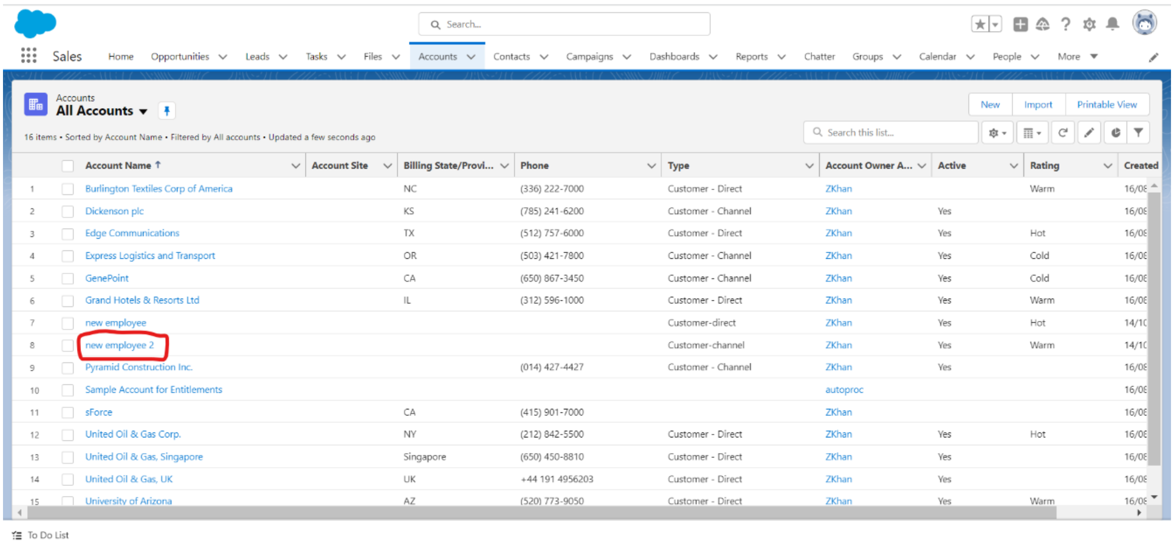
- Now go to setup and again search for data import wizard. And click on it.
- After that click on launch wizard.
- Select account object. After that select **Add new and update existing records**.

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

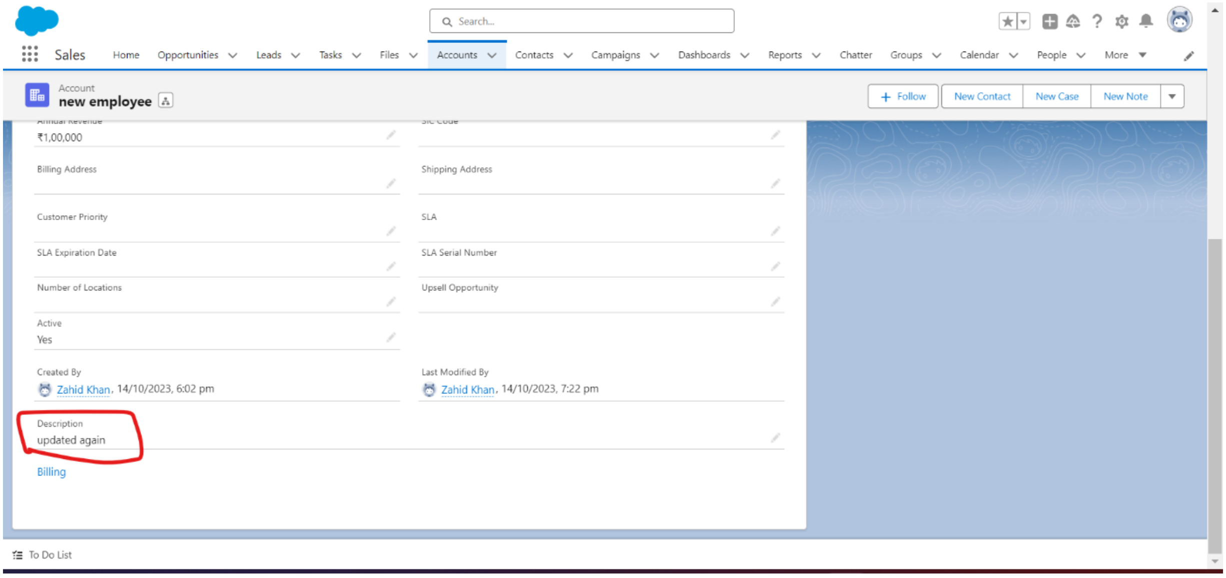


- After that map the unmapped salesforce object and click on next. And click on start import.
- Now data is updated, and new data also imported.
- Go to the sales App and click on accounts tab and check the results.

New imported Records



Updated records



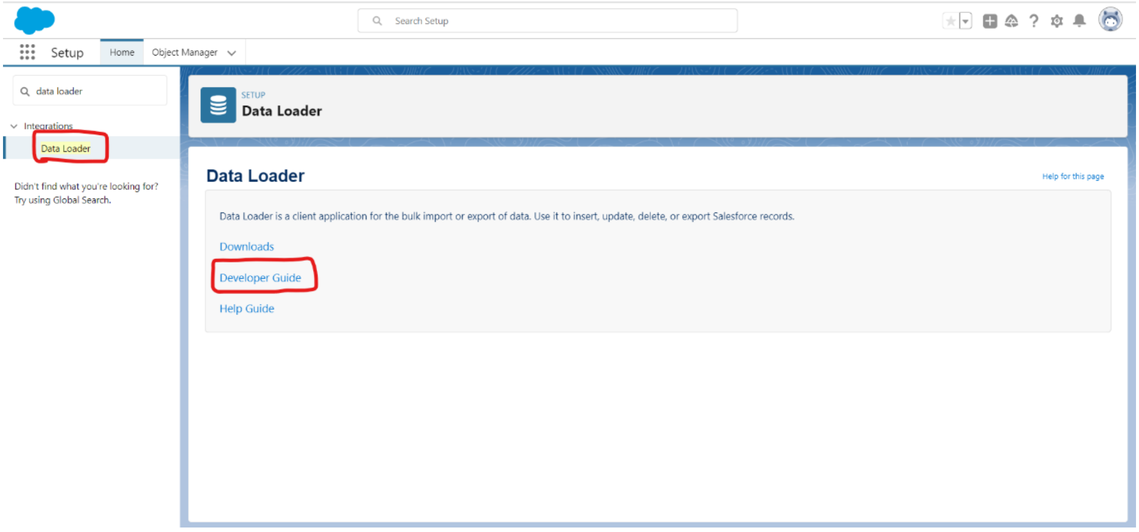
Data loader

- 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).

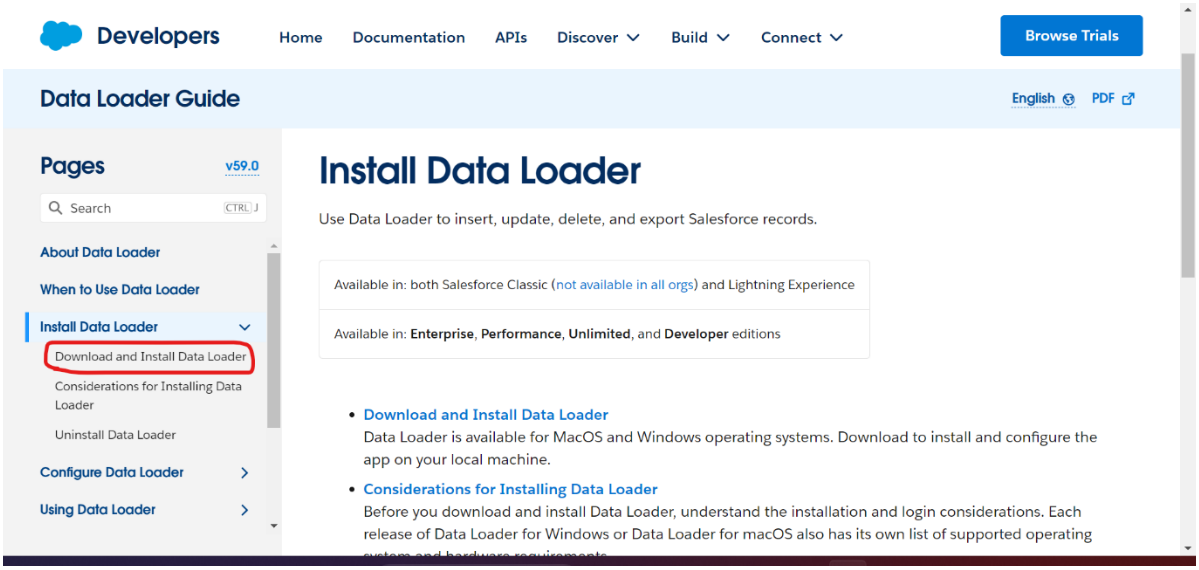
Steps to download data load and install:

- 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.

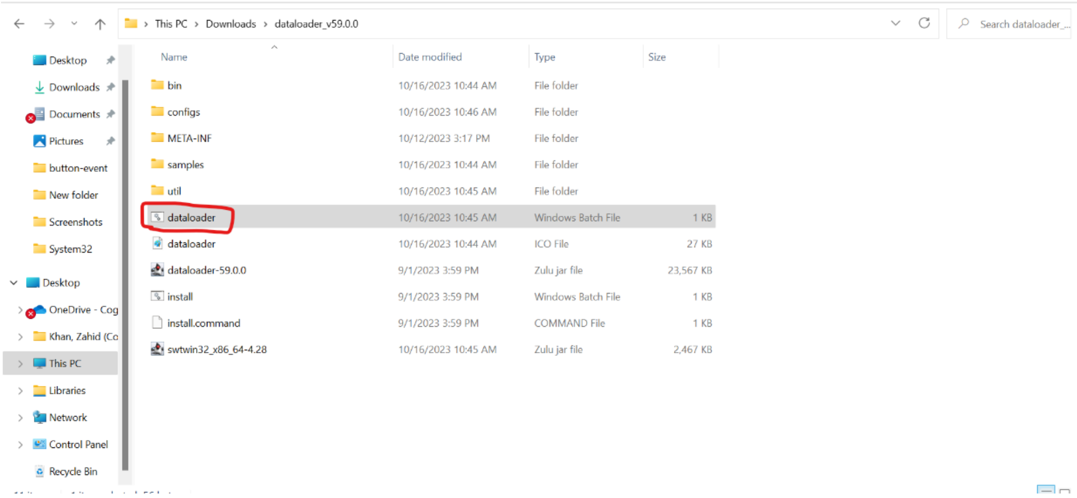


- In new page click on install data loader after that click on download and install data loader.

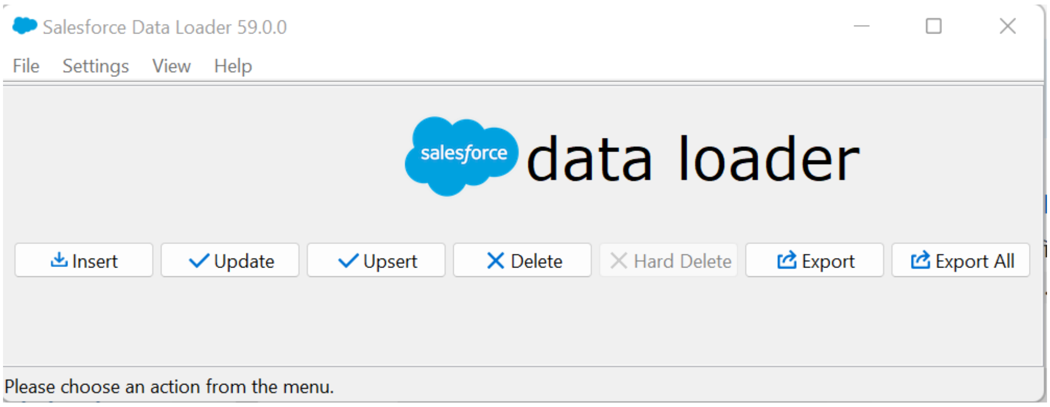


- After that follow all steps on the page and install the data loader.

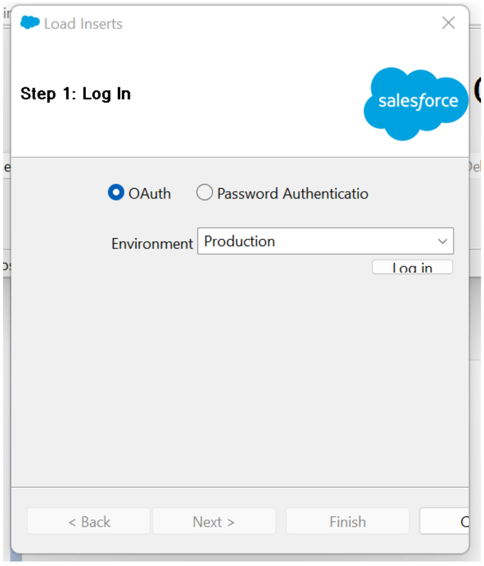
- After installation of data loader, we can get a icon on desktop if not then go to the extracted path of the data loader and click on below file.

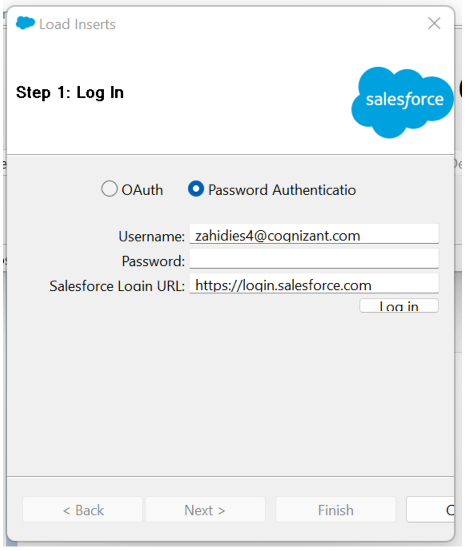


- After that we got the below interface of data loader.



- 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.

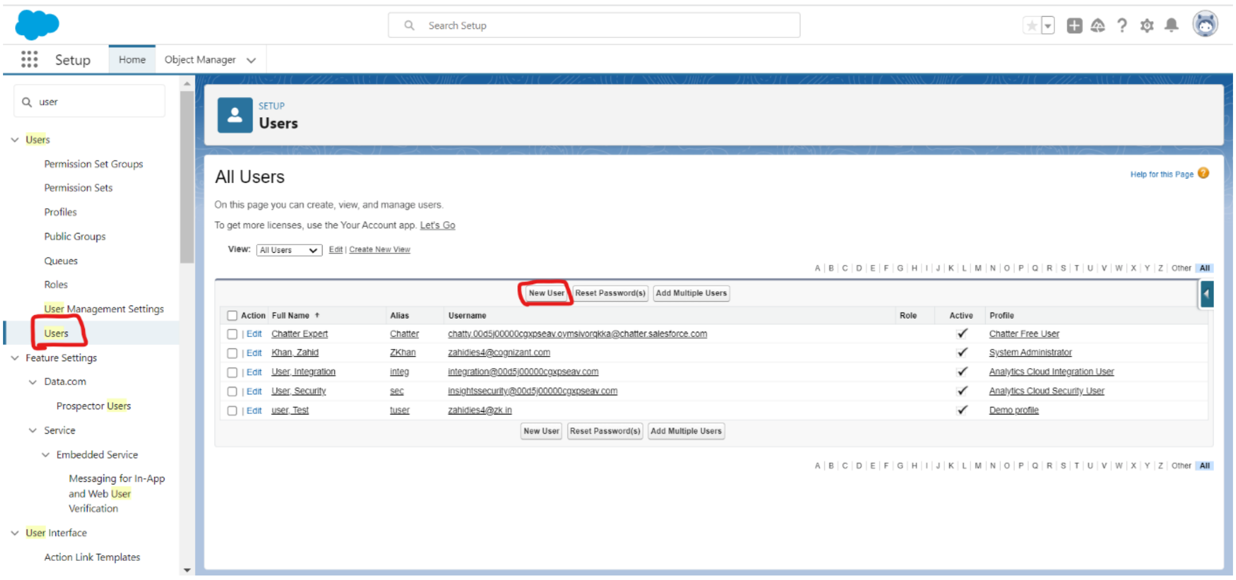
Day-14

Approval process

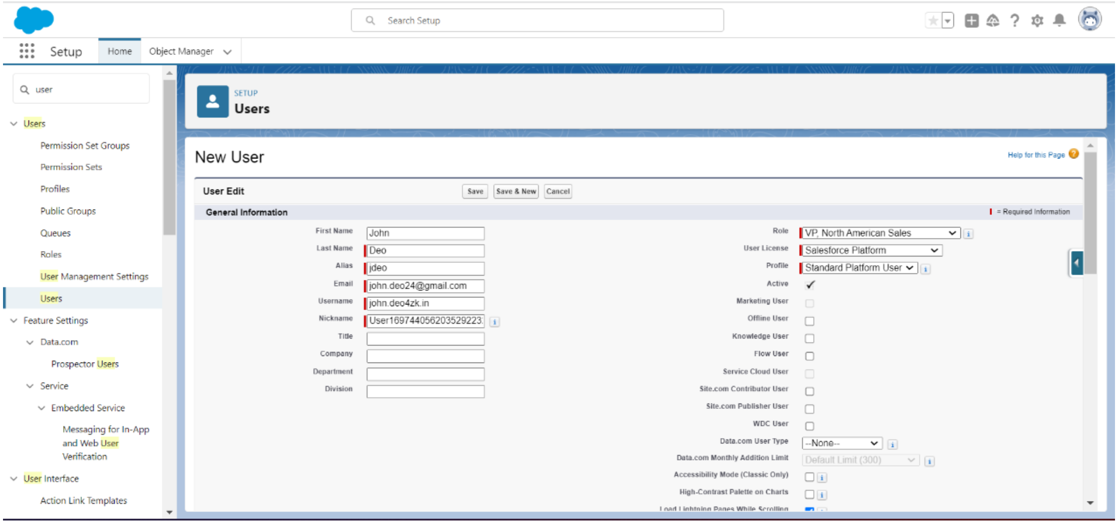
- An approval process is an automated process.
- It is implemented to approve records.
- We can specify the steps those are necessary for approval.
- It allows a step to apply to all records or just records that have certain attributes.
- In approval process we can also define who will be approving at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

Steps to create approval process:

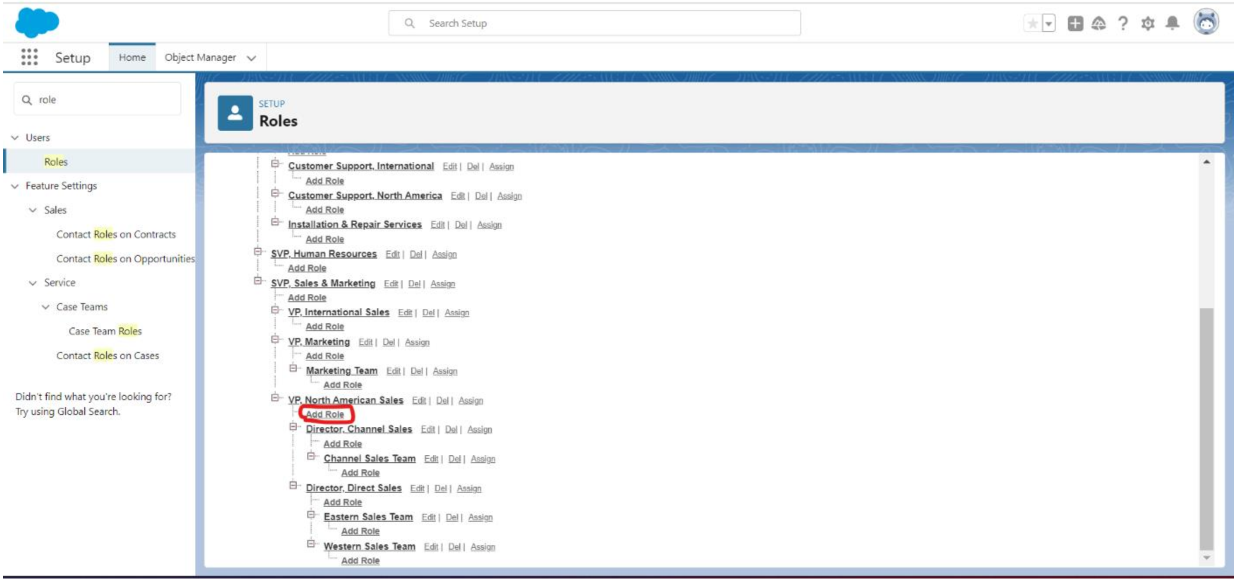
- We take following scenario for creating Approval process.
    I. If discount is requested for 20% or less, it is automatically approved.
    II. If a discount is requested for more than 20%, it must be approved by a manager in the sales department for U.S. reps.
    III. If discount is requested for 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.



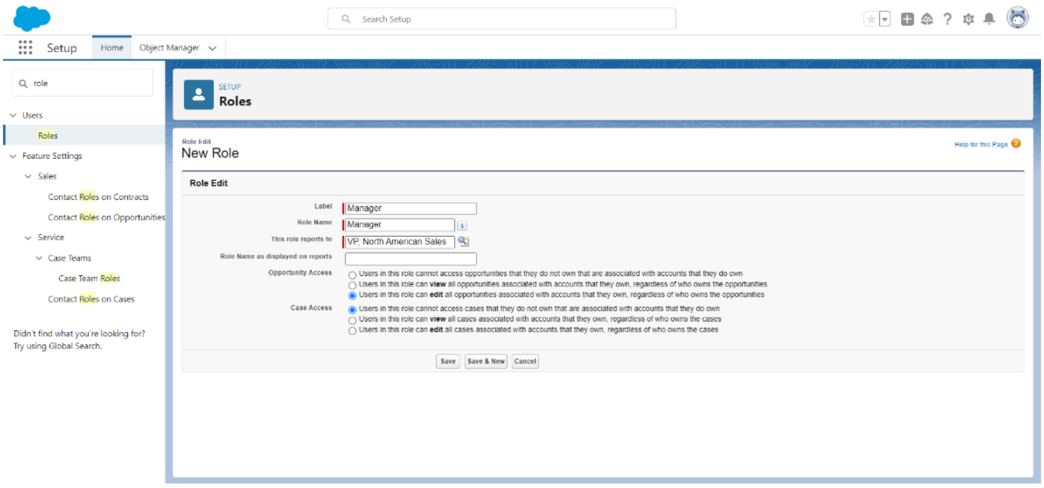
- After that enter all details for VP role and click on save.



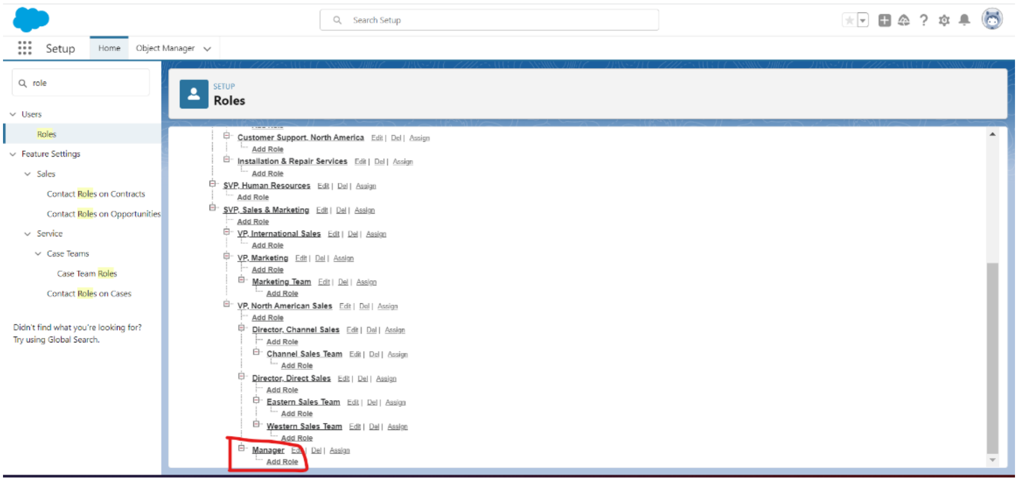
- Now VP profile user is created.
- After that create a role under VP.
- To create role search for **Roles** in quick find and click on it. And click on expand all to show all the hierarchy.
- Now click on add role under VP, north America sales and make manager role.



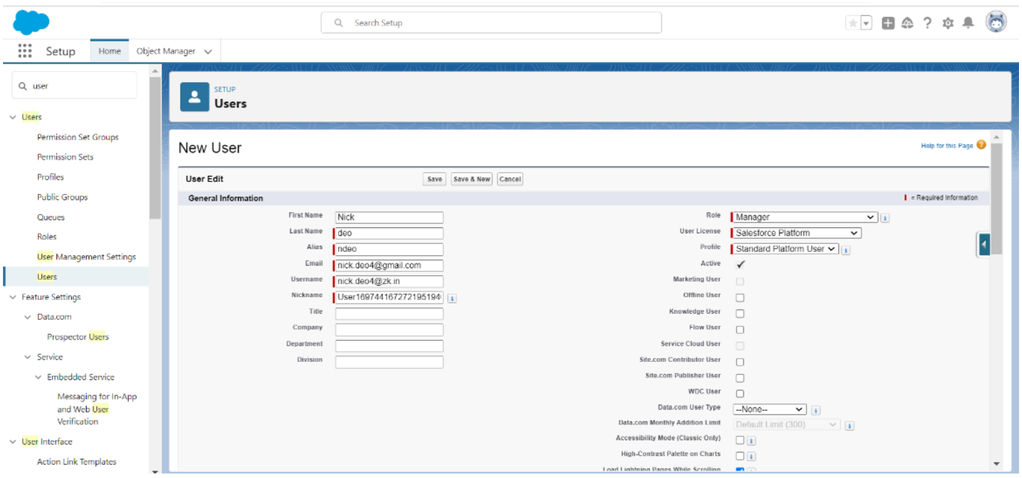
- After that enter the label and role name and click on save.



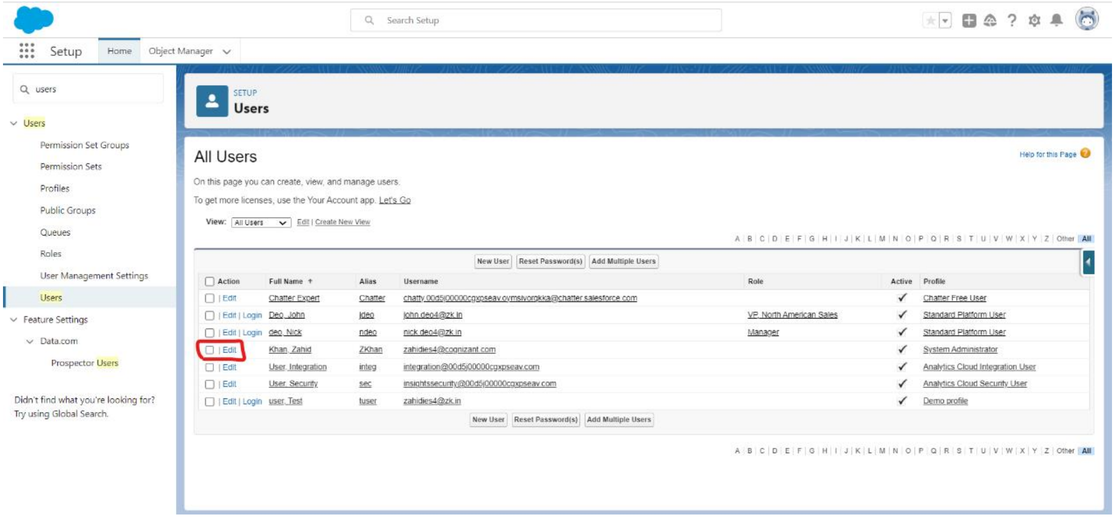
- This way manager role is created under VP.



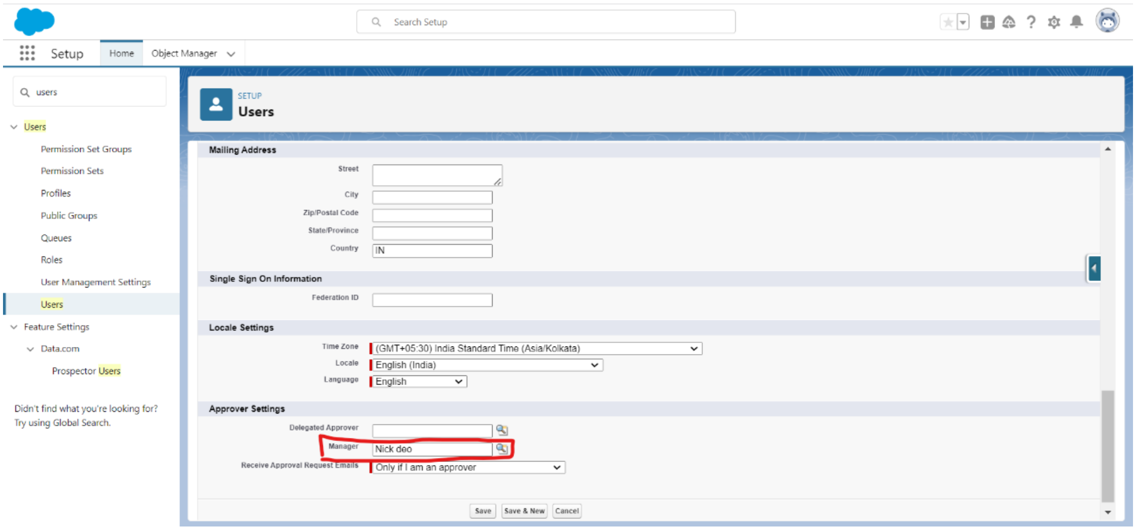
- Now we can create manager user under users' section. Before creating manager user we have to create role under VP after that we can create.
- Now, we have to create one more user for manager. Same way creates a user for manager and select role as manager.



- 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).



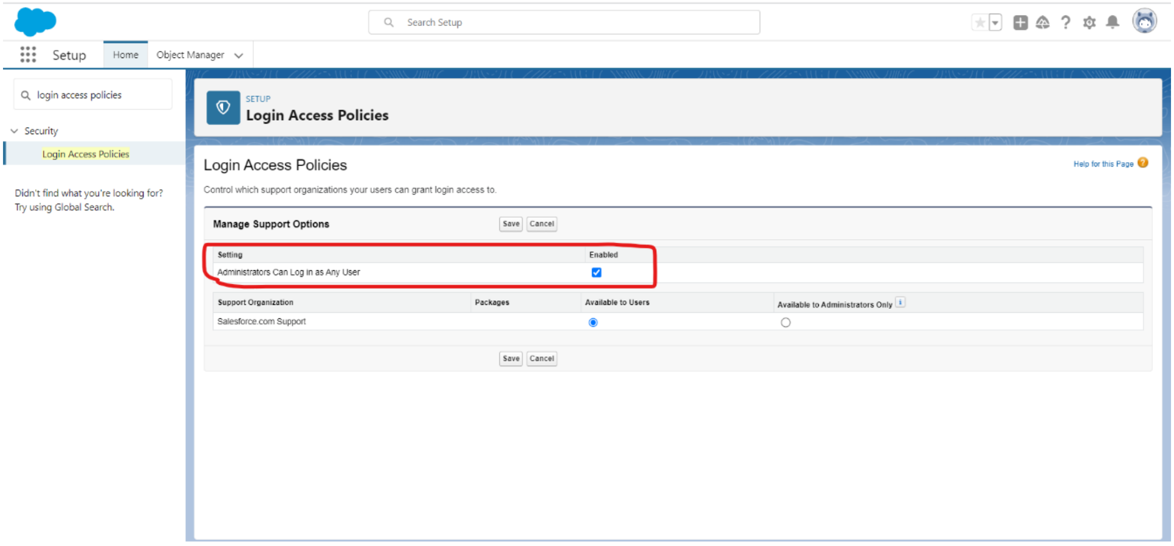
- After that scroll down and select manager field as nick deo. This way my manager is nick deo. And click on save.



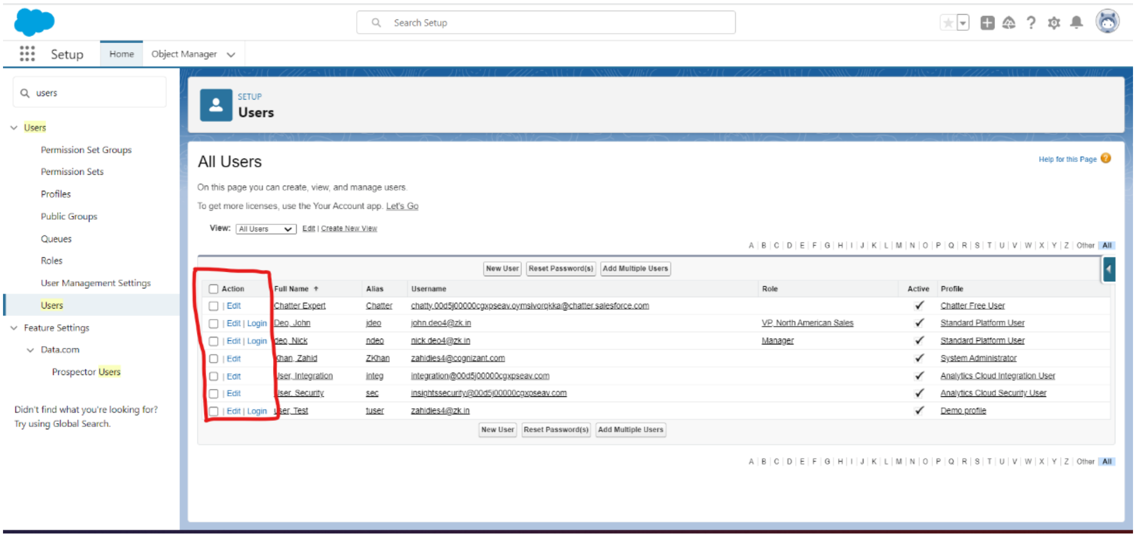
<u>Steps to enable login option in users:</u>

- 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.

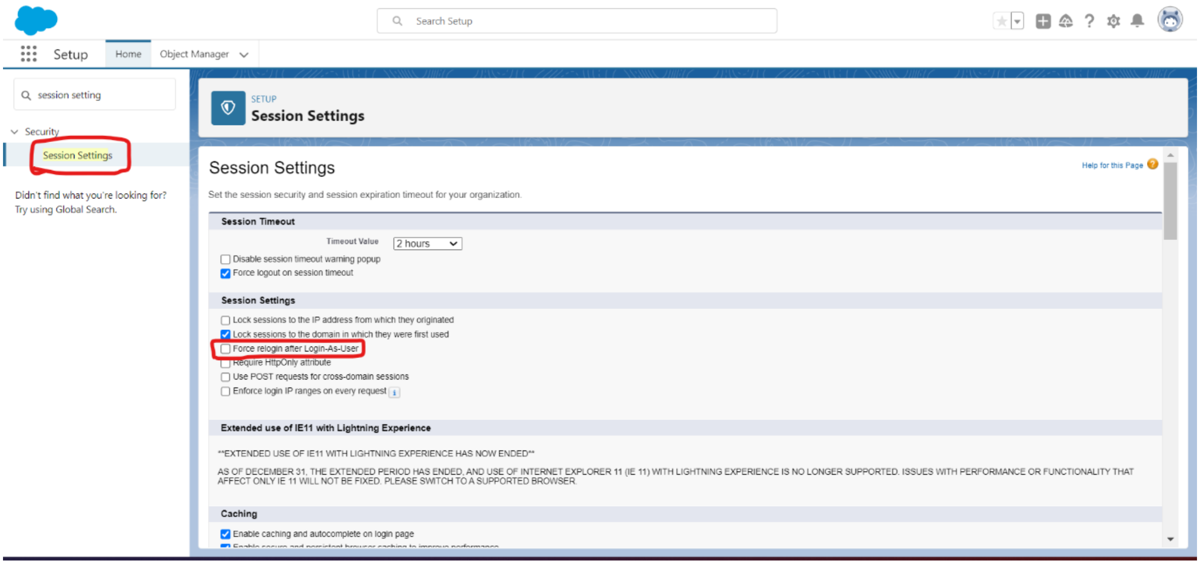


- After that again search for user and check that login option is available.



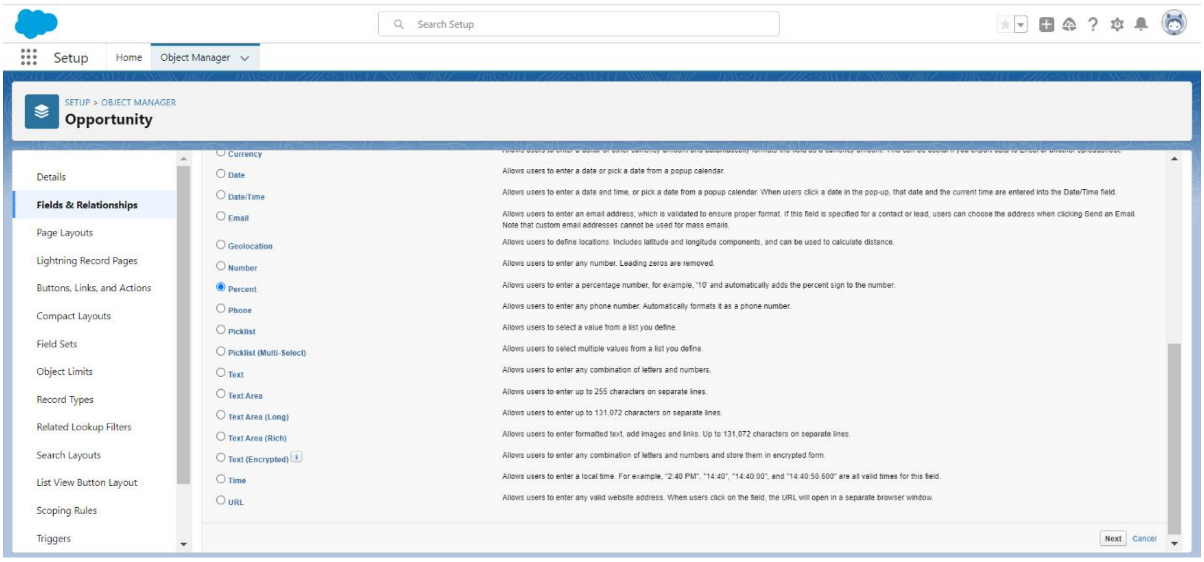
<u>Steps to enable login without password using user option:</u>

- 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.

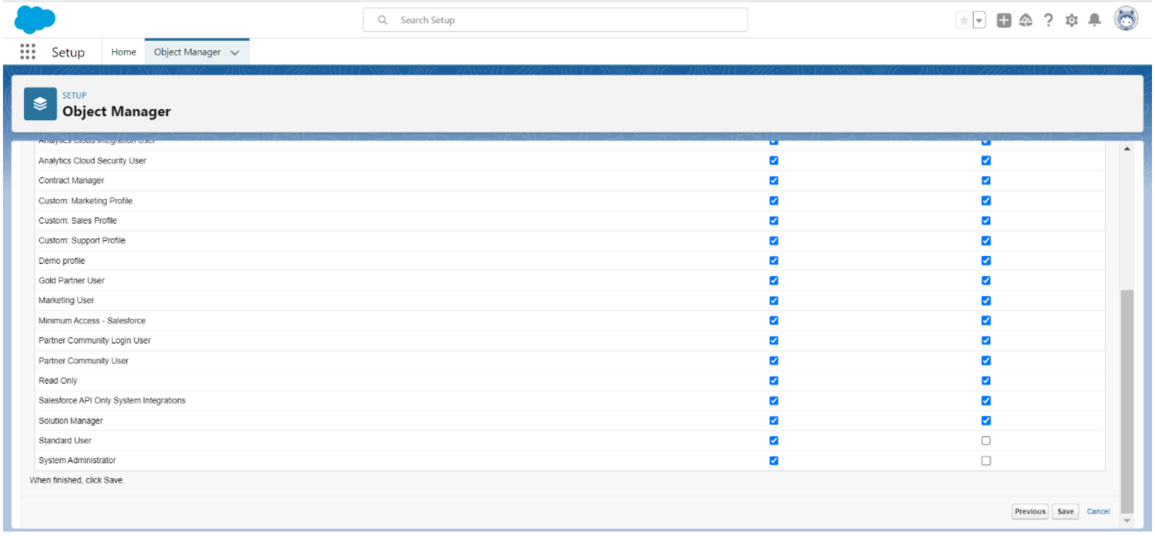


create approval process for opportunity:

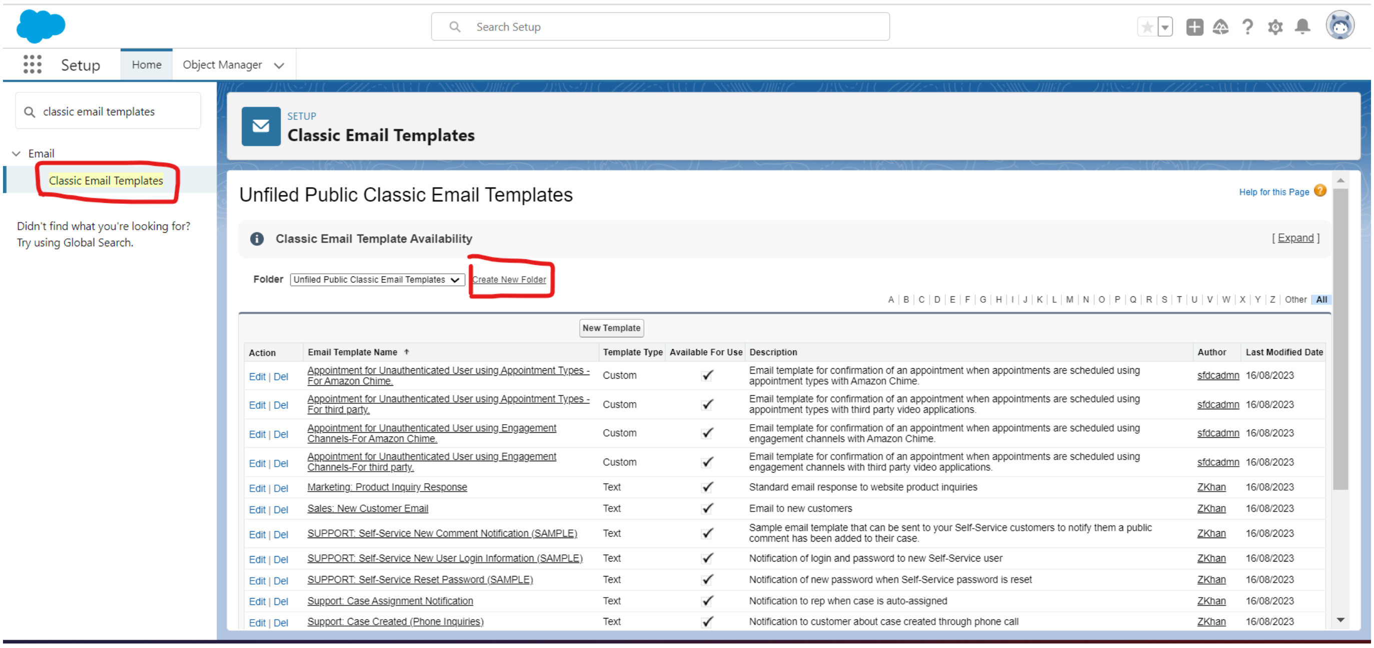
- All set-up in done for approval process. Now we are going to make approval process for opportunity object with discount field as mentioned in 1st page.
- Go to the opportunity object and click on field & relationship and create new field.
- After that click on new and choose data type as percent.



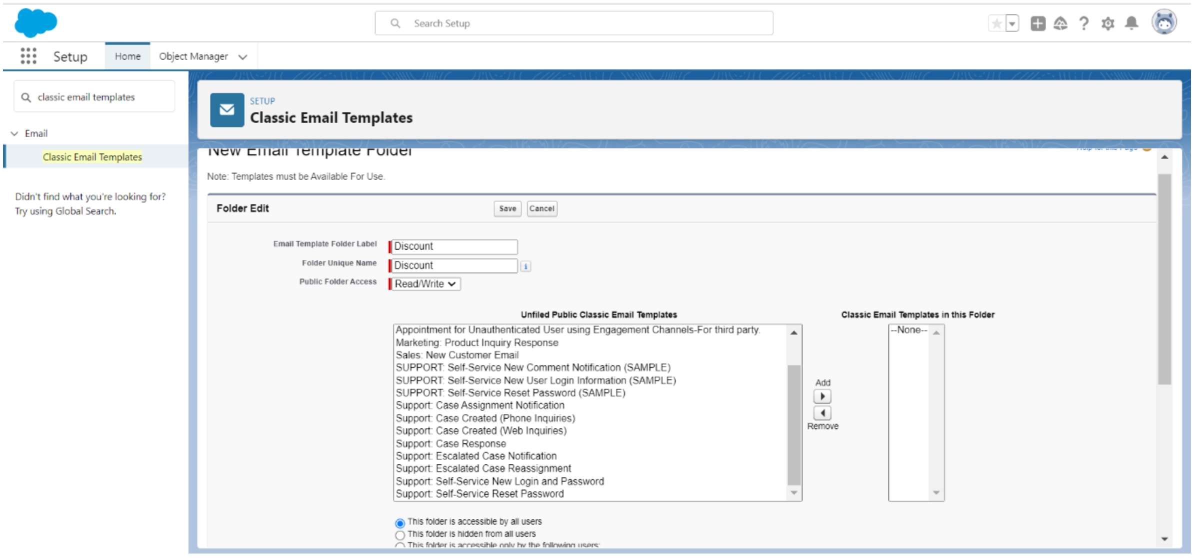
- After that click on next. Enter label name (discount percentage) label is 2 and decimal places is also 2.
- Click on next.
- After that check the visible box so that its visible to all and also check the read only box only uncheck the standard user and system administrator box of read only.



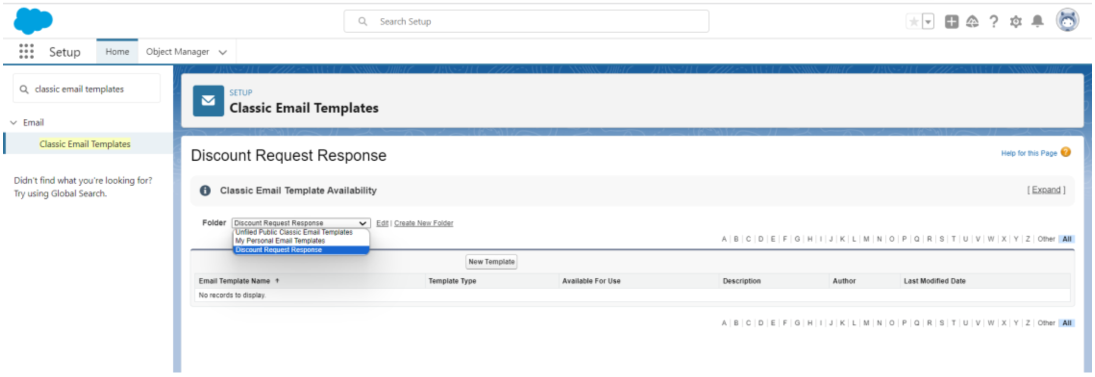
- click on next and save.
- Same way creates one more field and choose data type as picklist (approval process). And all option should be same as discount percentage.
- Now both field is created.
- Next step we have to **create a folder** and **email templates**.
- For this go to home and search for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



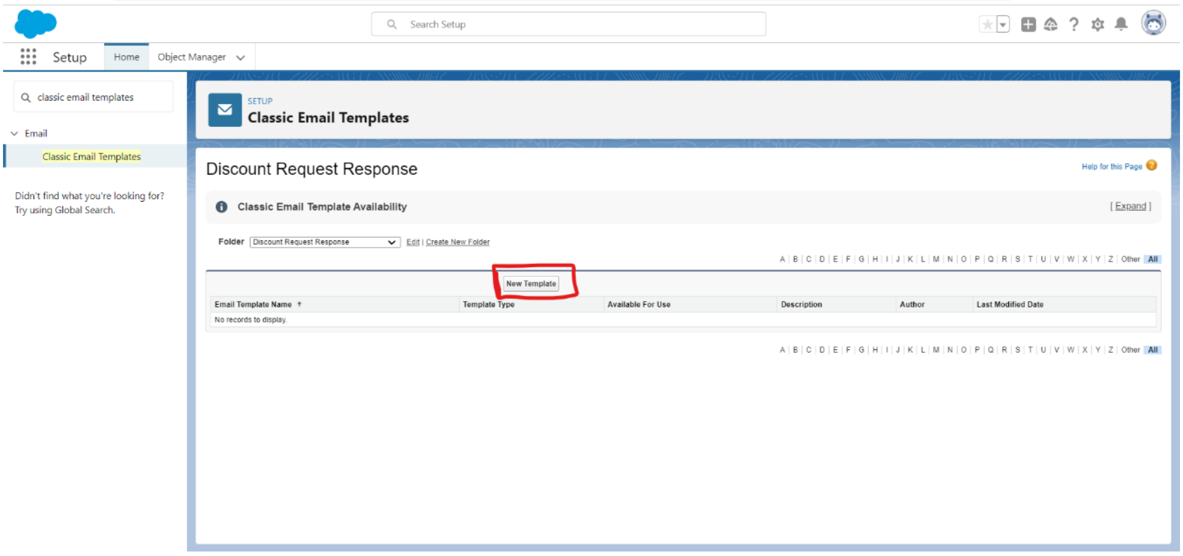
- After that enter the email templates folder label (i.e., discount request response) and folder unique name. and select public folder access is read/write. And click on save.



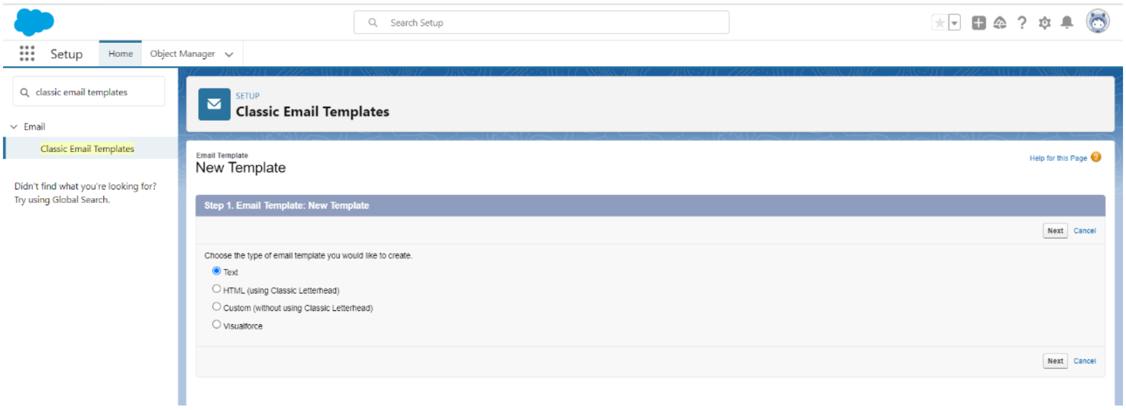
- now new folder is created.
- After that select folder which we created from drop down.



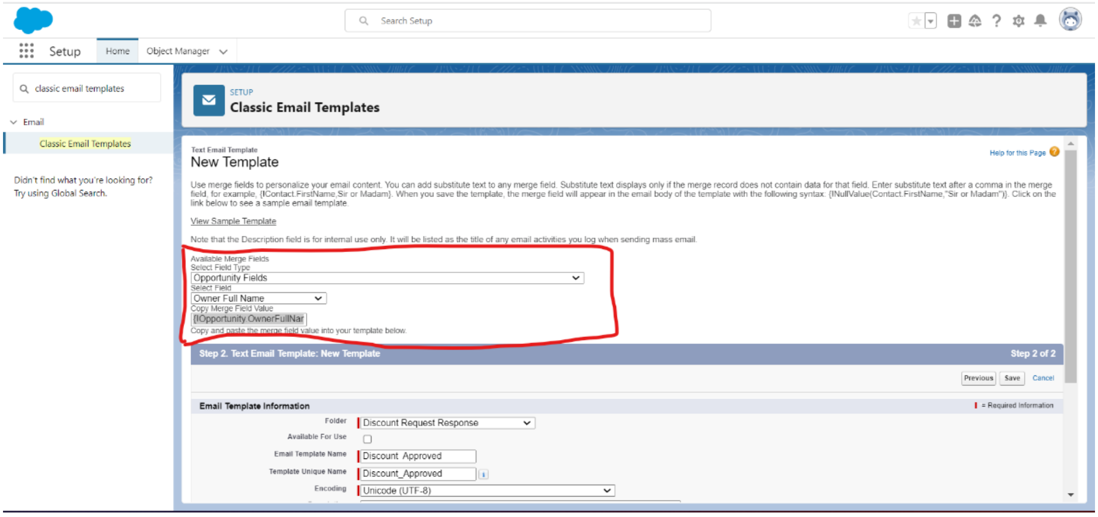
- After that we have to add templates. For this click on Add templates.



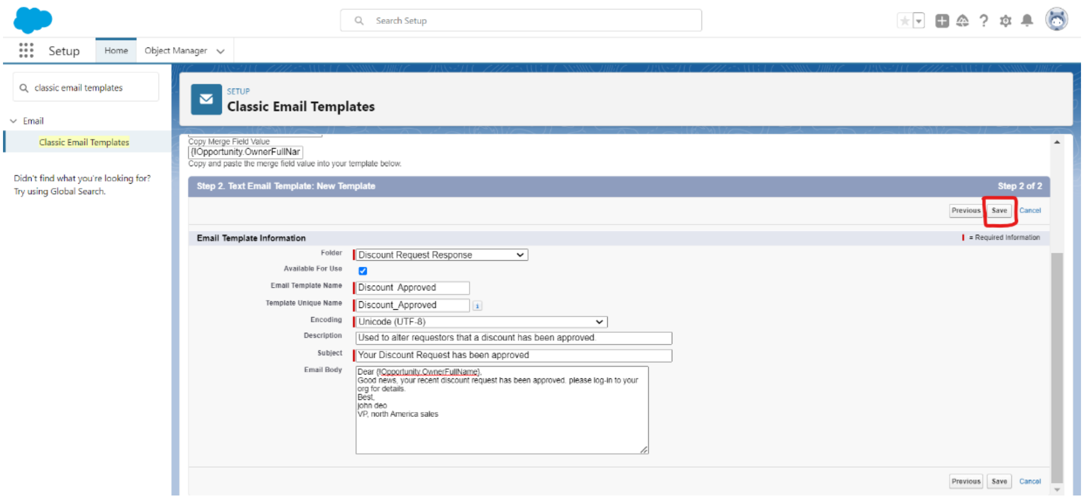
- After that in step 1 choose text. And click on next.



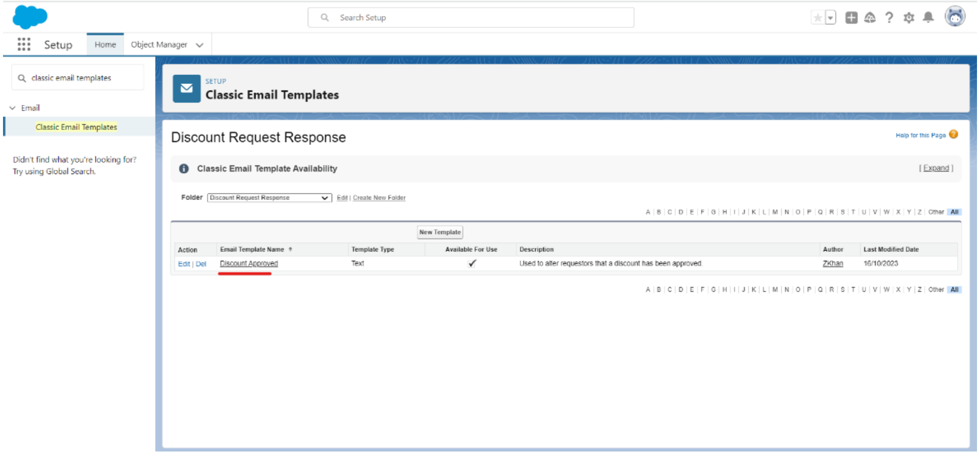
- After that we have to enter **email templates name**, email templates folder already entered, **template unique name**, check the box **available for use, description**, **subject** and **email body**.
- We have to enter the merge field of the owner's name from above of the email templates. Just scroll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



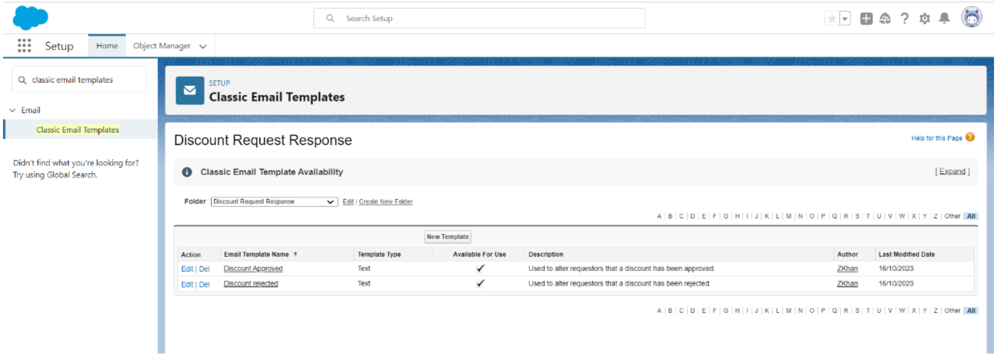
- After that paste the merge field and save.



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

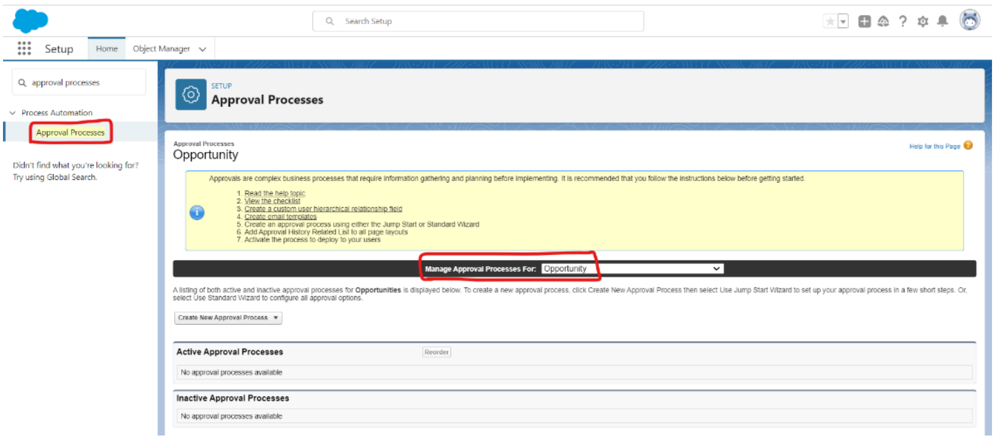


- Now in same way we have to create one more template for rejected approval inside same folder (discount response folder).
- Both email templates are created.

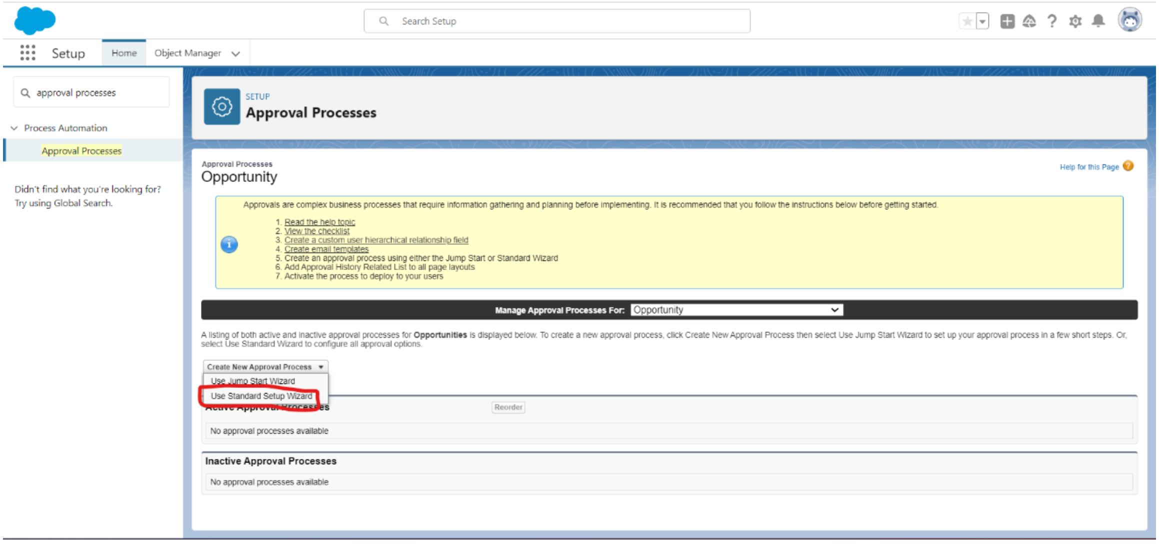


Approval process:

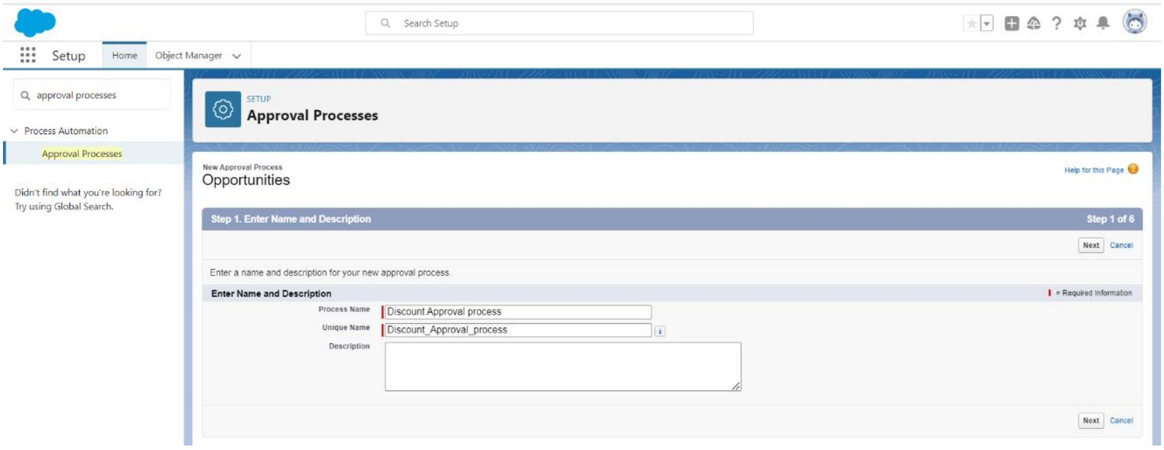
- Now next process is to set up approval process.
- For this search for Approval process in quick find box and click on it. And select manage approval process for opportunity object. Because we are taking example of opportunity object.



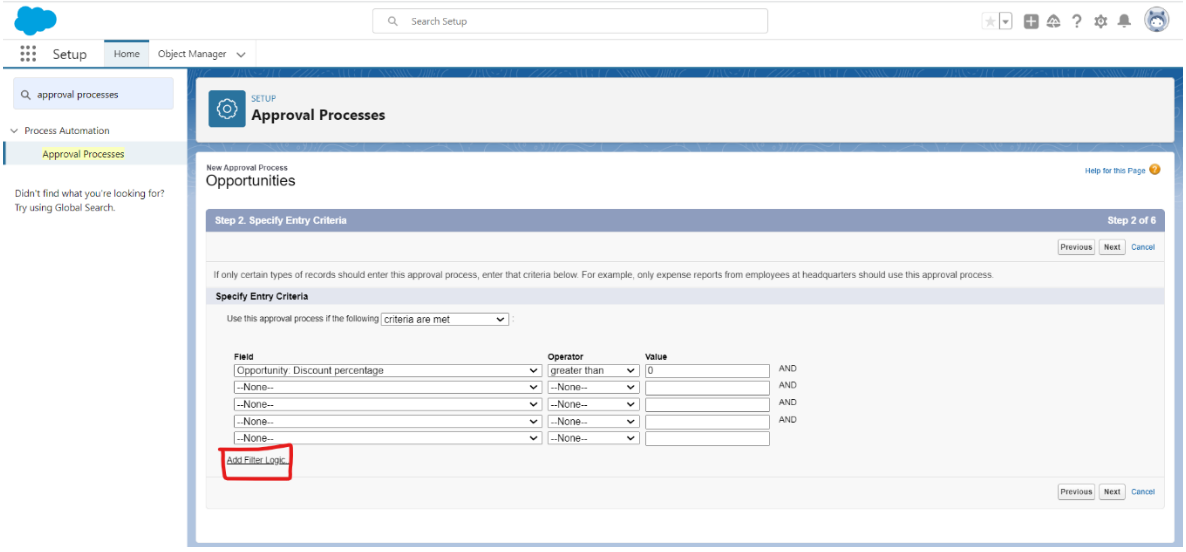
- After that click on the new approval process drop down and select use standard setup wizard.



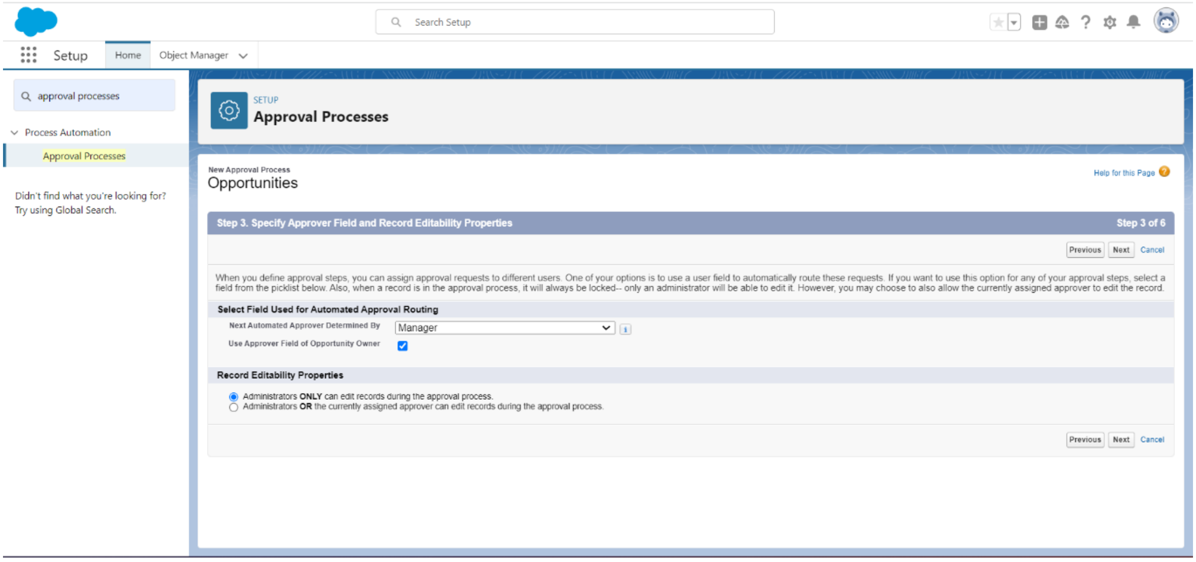
- After that enter process name, unique name, and description.
- After that click on next.



- 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.

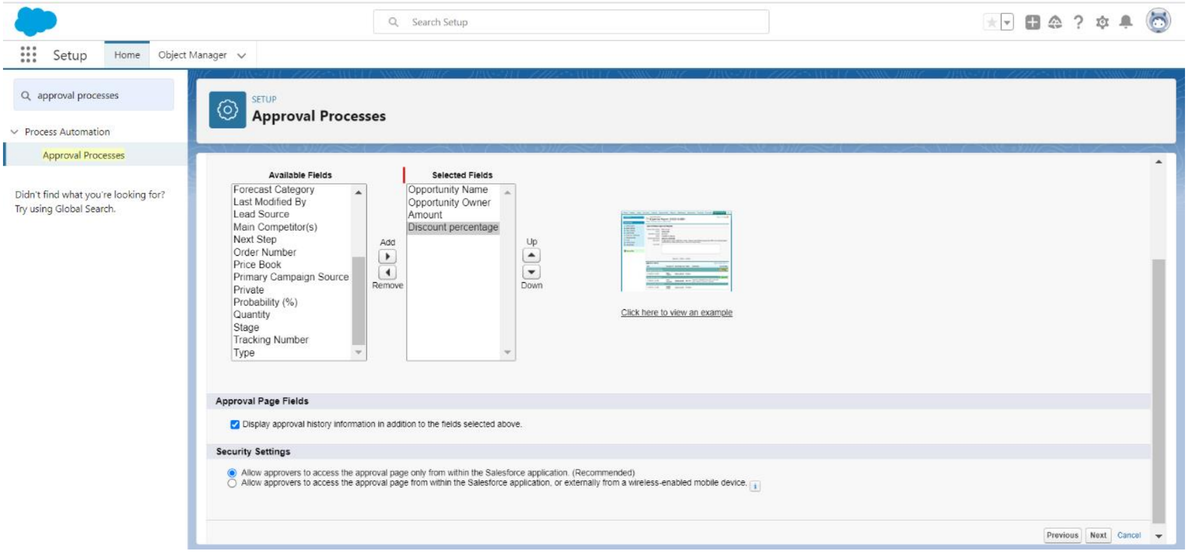


- in next step we got 2 options 1st for **select field user for automated approval routing** and 2nd is **Record editability properties**.
    I. In 1st step we have to select Manager in **next automated approved determined by.** its means when discount percentage field is created that record will automate route to the manager of the system administrator which we edited (nick deo). And check the box use approver field of opportunity owner.
    II. 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.

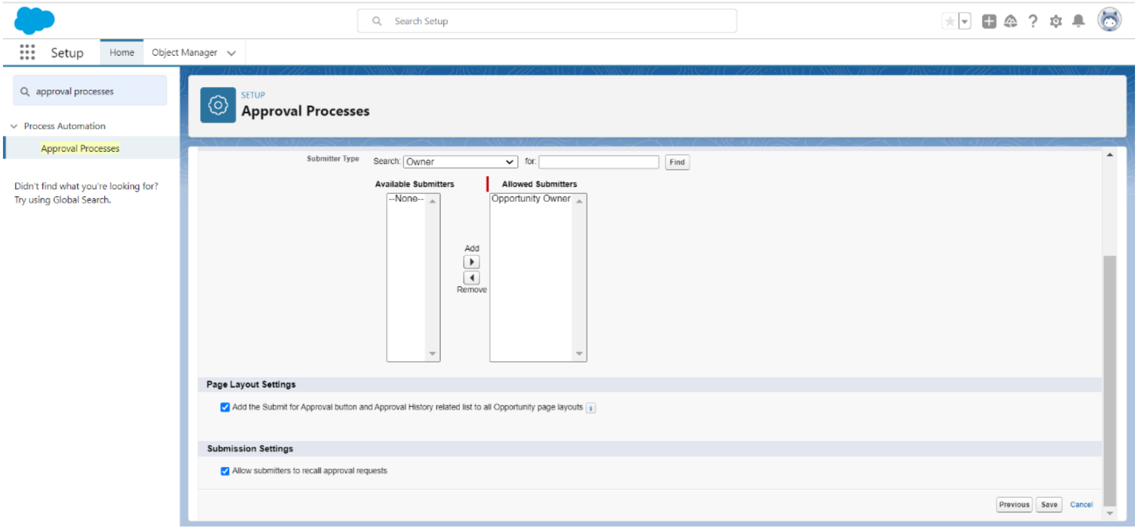


next step we have to select assignment email templates. currently we don't have any templates, so we leave blank this field. Assignment email templates means that when any approval request assign to approver then this mail will send to approver in notifications.

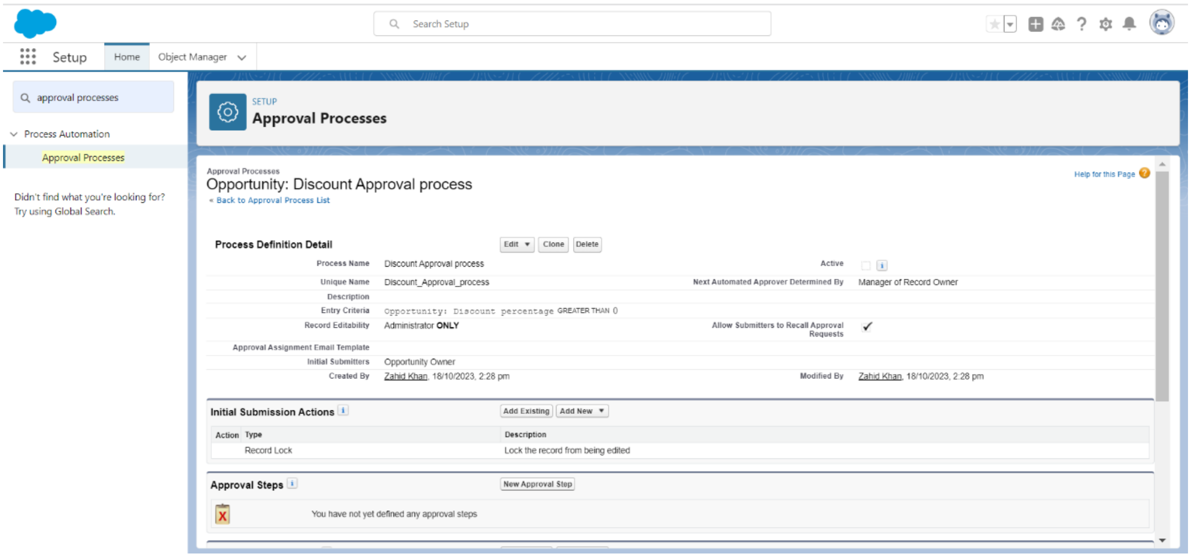
- After that click on next.
- Next steps, we have to Select Fields to Display on Approval Page Layout. Here, we are selecting Amount and discount percentage. Select these fields and click add button to add.
- After that check the box to the approval history to the field.
- Last option is that select 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.

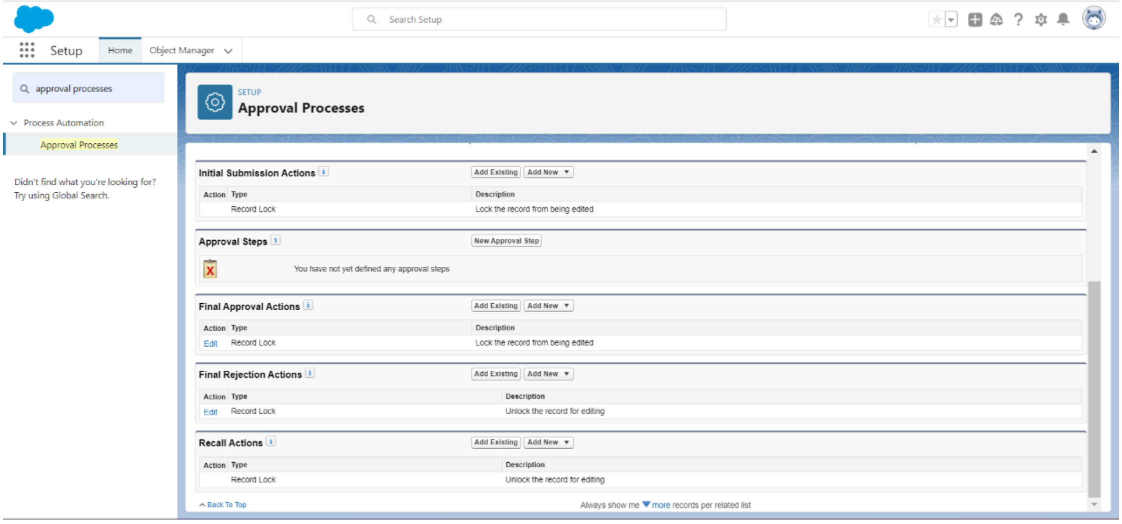


- In next step, we have to select the initial submitter. Opportunity owner is already selected.
- Next, in page layout setting select **Add the Submit for Approval button and Approval History related list to all Opportunity page layouts.** So, that one approval button will be add in opportunity page.
- 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.

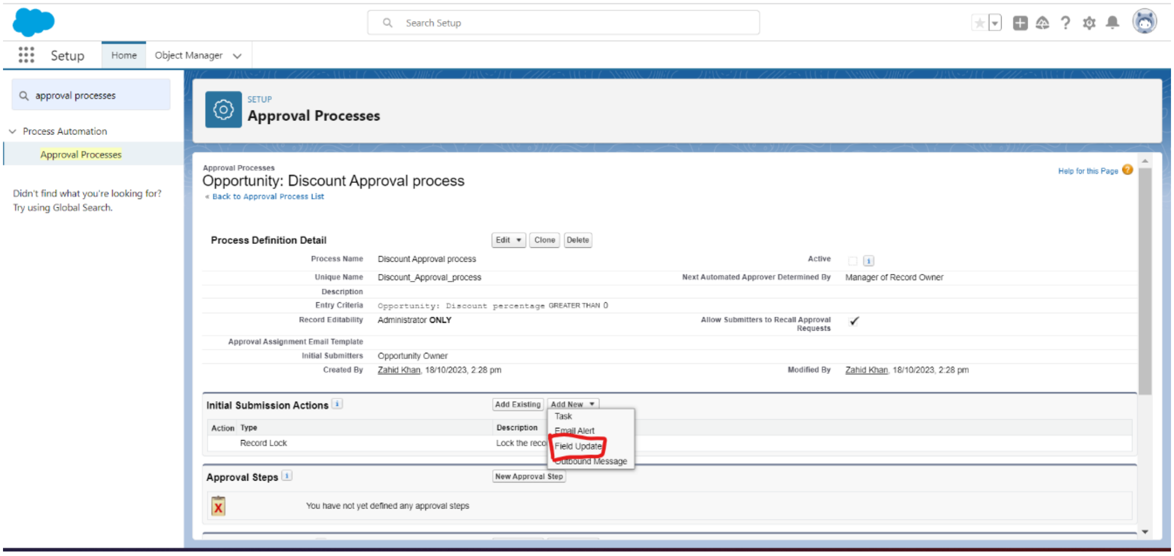


- After that we will find 3 options.
  You have just created an approval process. However, you cannot activate this process until you define at least one approval step.
  Would you like to do that now?
  I. Yes, I'd like to create an approval step now.
  II. I'll do this later. Take me to the approval detail page to review what I've just created.
  III. 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.
  I. Initial submission Actions
  II. Approval steps
  III. Final approval actions
  IV. Final rejection actions
  V. Recall actions

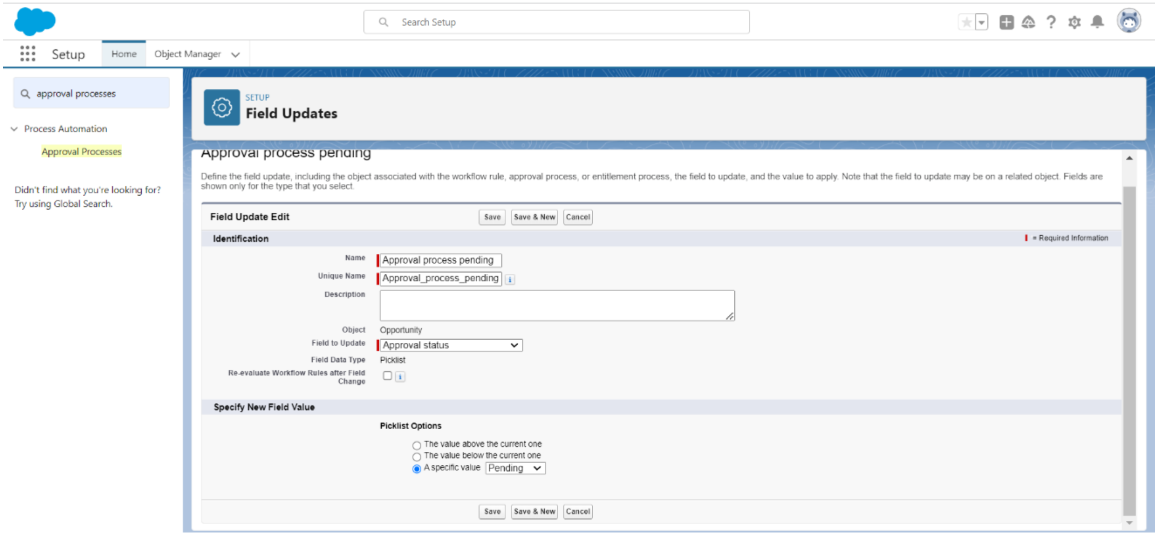




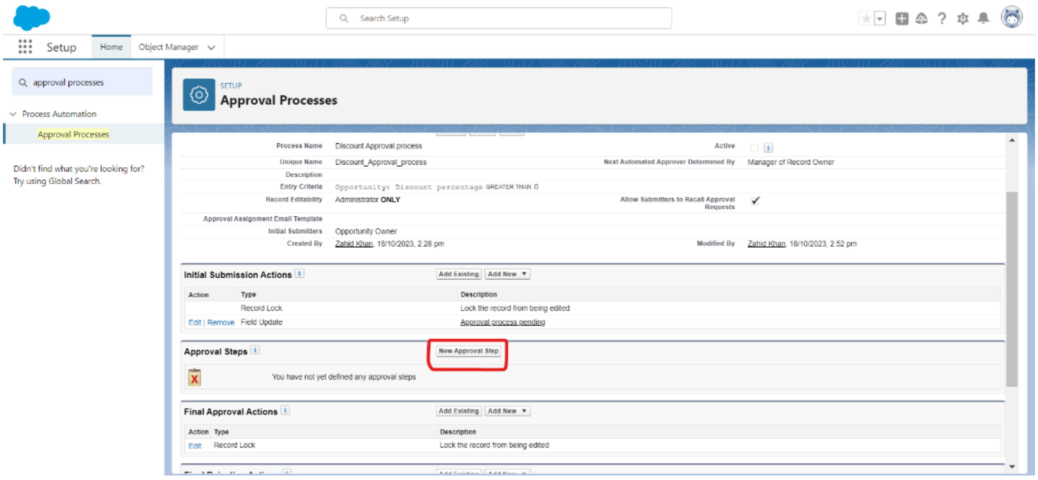
- Now, first we have to enter **initial submission actions**. This record is locked so that nobody can edit these records.
- Click on Add new button in which we got 4 options. Task, email alert, field update and outbound messages. Here we are selecting field updates. Because w are made a picklist filed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



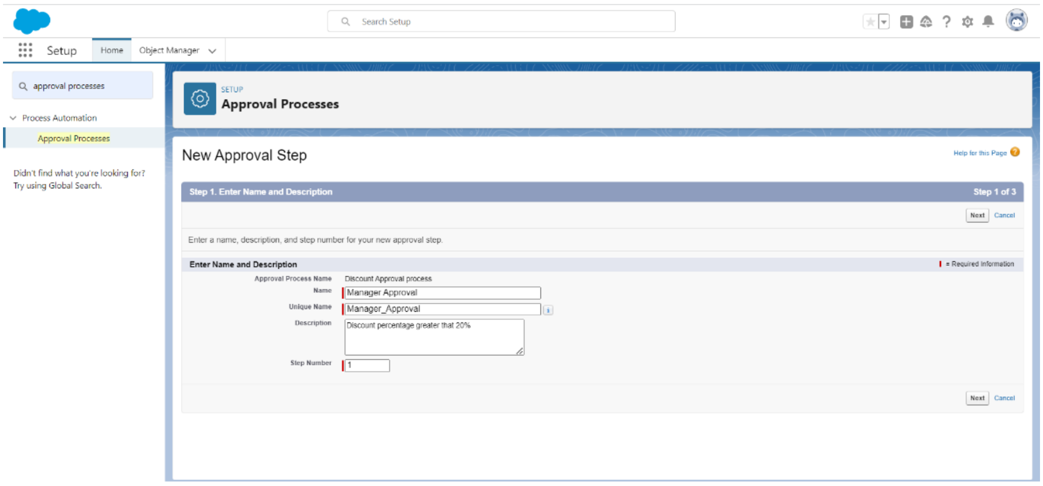
- After that enter the name, unique name, description and filed update.
- Select the field update is approval process field. And in specify new field value select pending
- After that click on save.



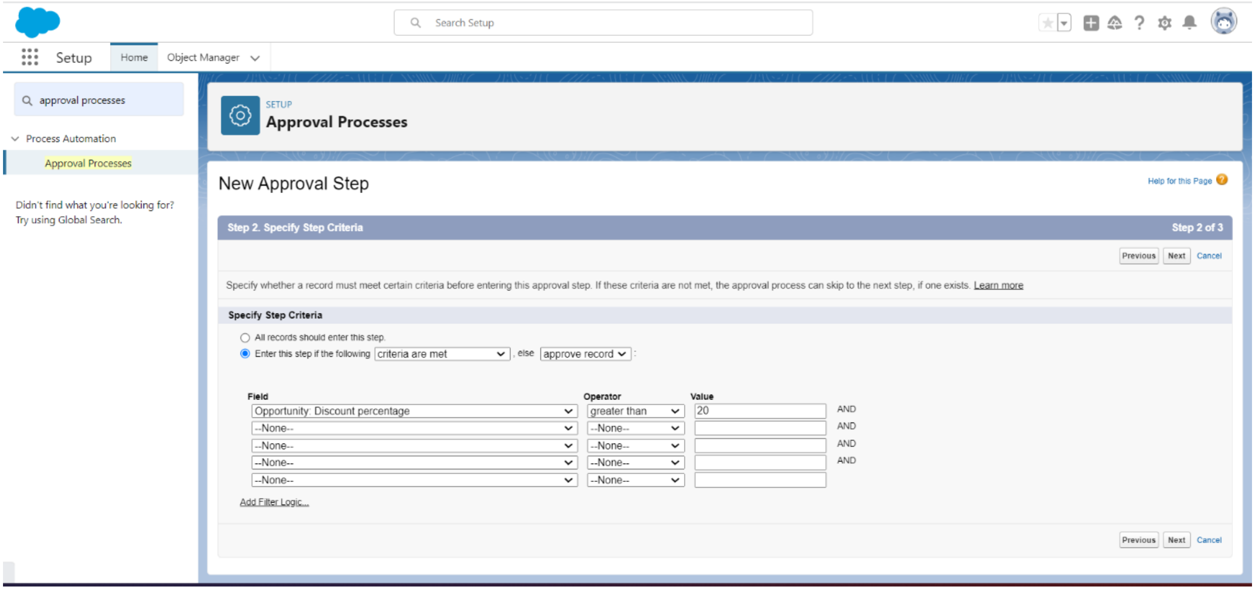
- now initial submission is done whenever approval process starts the value will be show pending.
- Now, in second option we have to specify **approval steps**. For this click on **new approval steps** button under approval steps options.



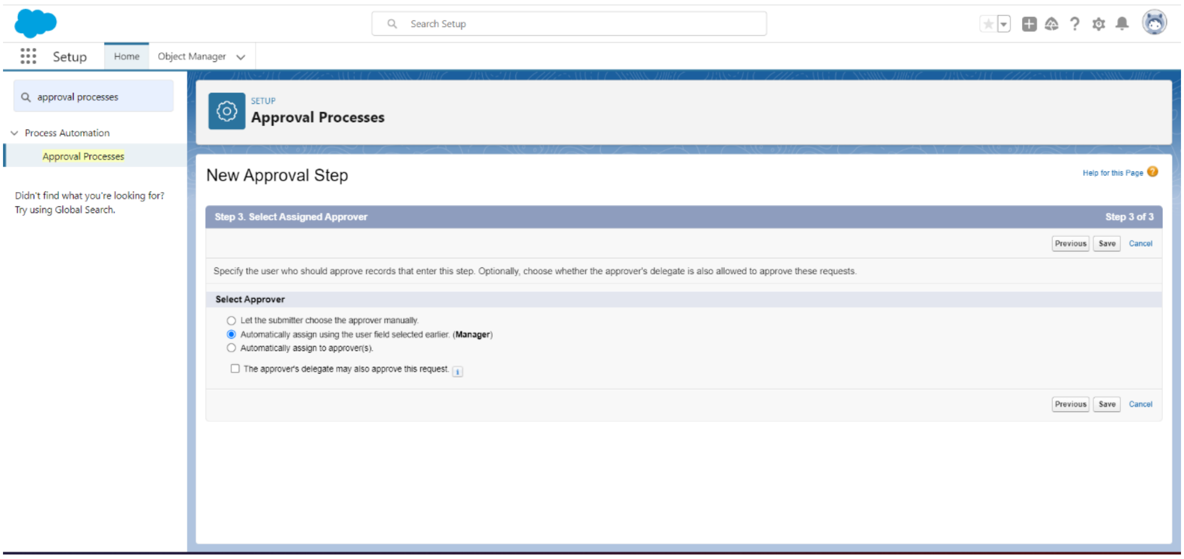
- Enter the name, unique name, description, and steps. And click on next.



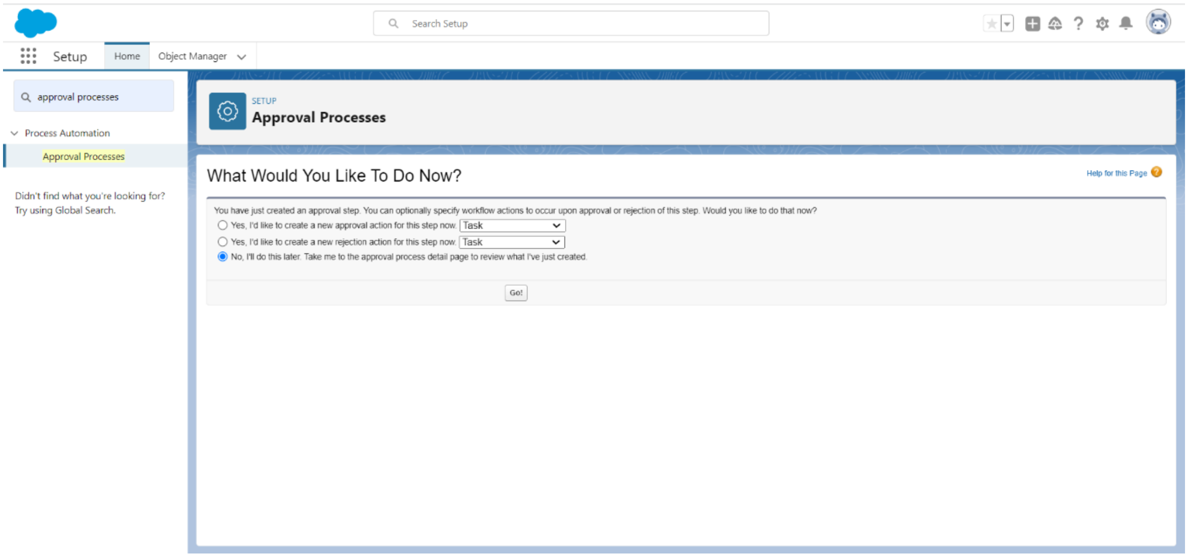
- After that we have to specify step criteria. Click on 2nd option and enter the criteria that if discount percentage is greater than 20% it will go for manager approval.
- click on next.



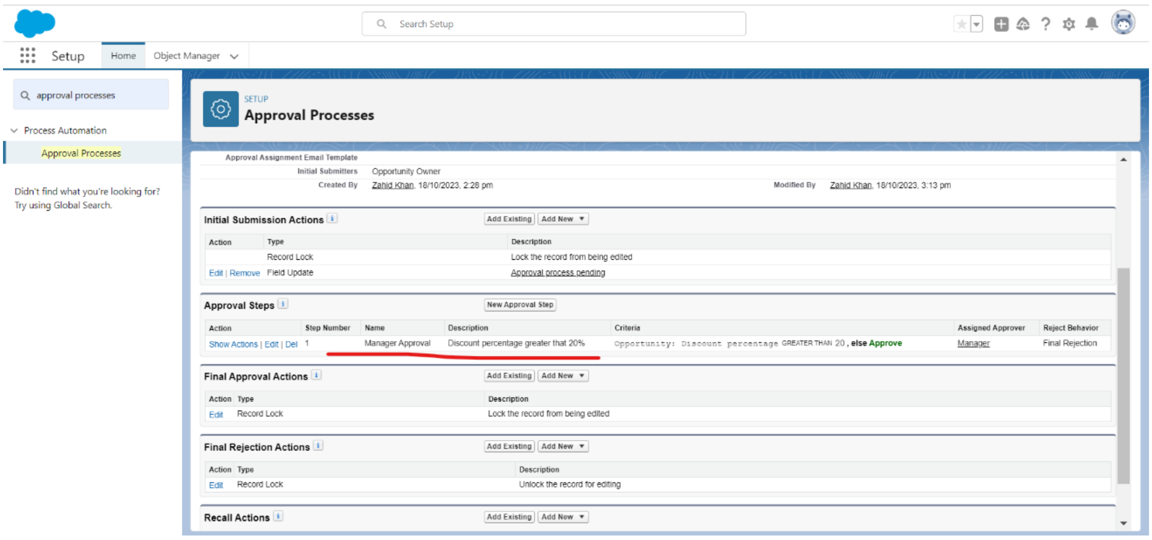
- After that we have to select the approver. In which we get 3 options.
  I. 1st let submitter choose the approver manually.
  II. 2nd automatically assign using the user field selected earlier like we select manager so by default it selects the manager.
  III. 3rd automatically assigns to approver. 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.



- 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.

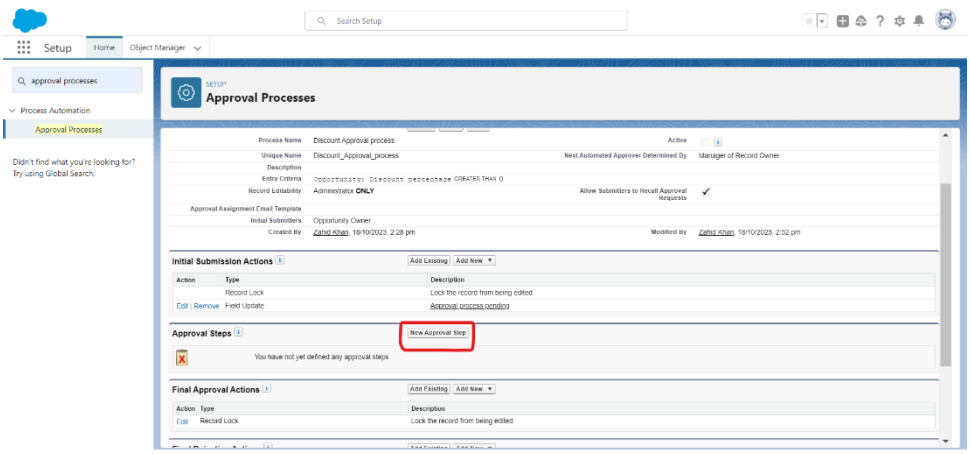


- This way 1st steps of the approval process are created. That is of the discount is

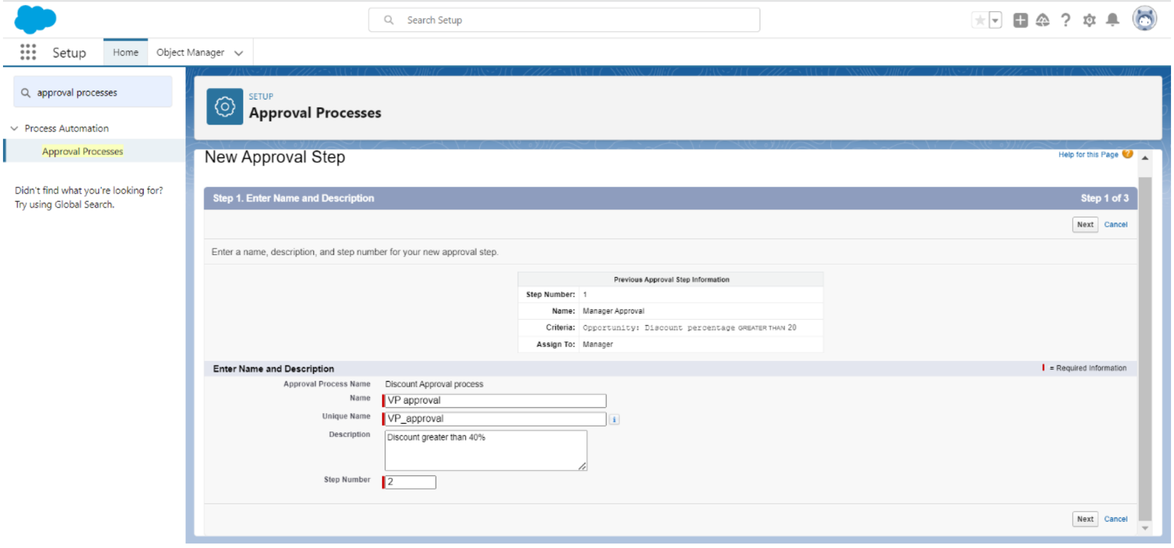


greater that 20% so its go for manager approval. If less the 20% its approved automatically.

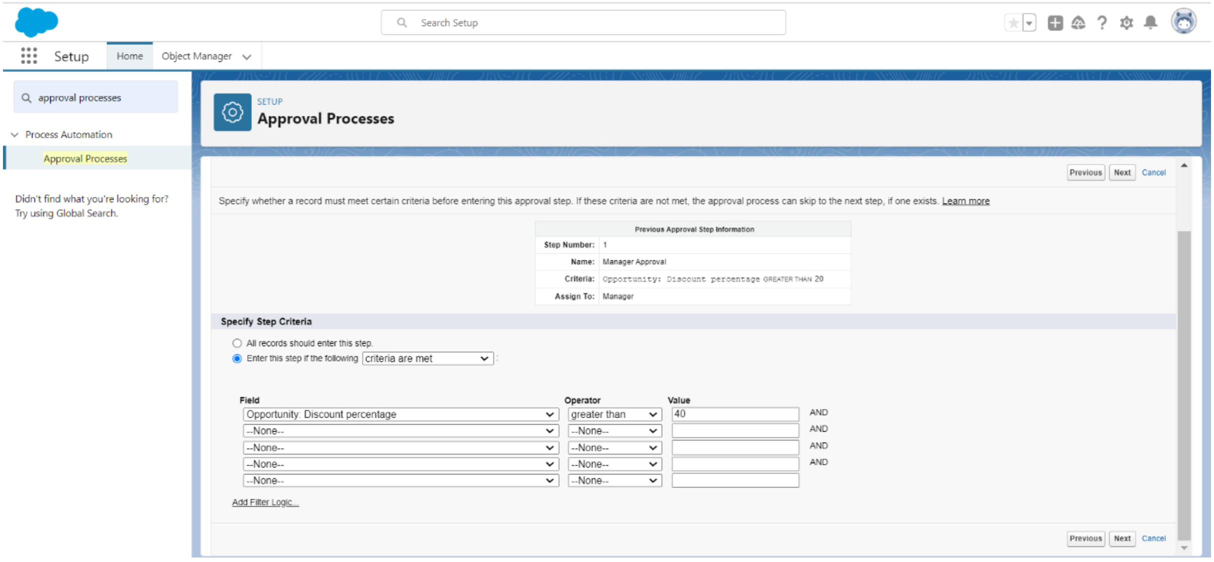
- Now we have to make 2nd steps for VP approval if discount greater than 40%.
- Again, click on new approval steps button.



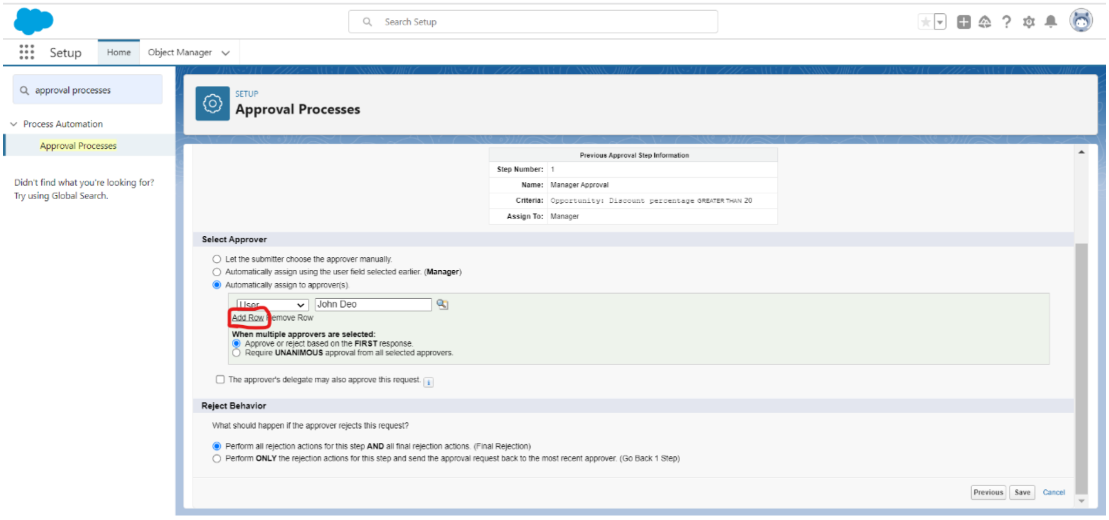
- Enter name **VP approval process**, unique name, description, and step number is 2 because its 2nd steps. After that click on next.



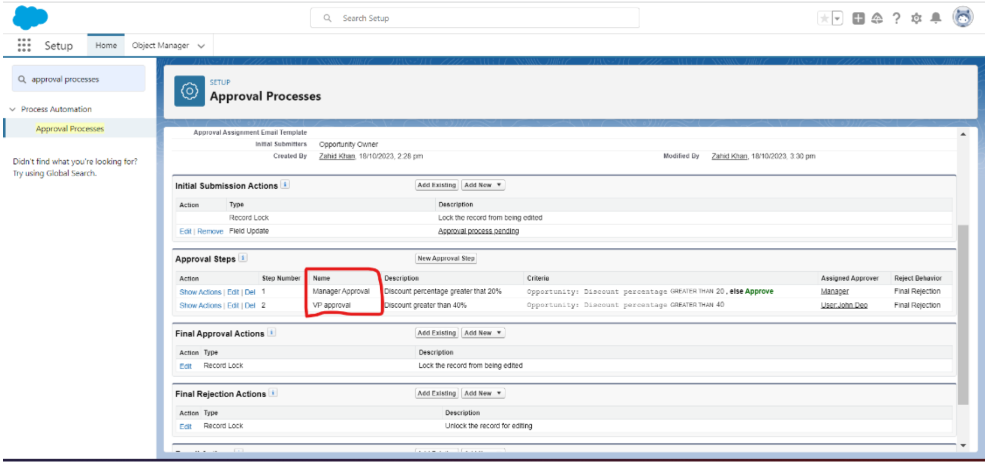
- After that enter the criteria that is discount percentage should be greater than 40%.
- After that click on next.



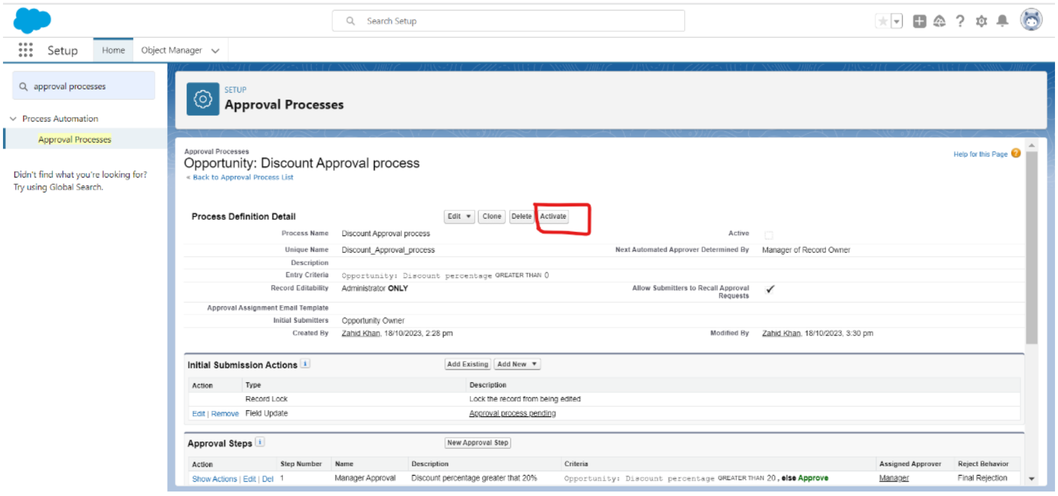
- After that we have to select approver. This time we have to select the 3rd option that is automatically assign to approver. Because we want to assign it to the VP. Select the user and click on search icon so that we can see available user list. And select john deo which role is VP. If we want to add 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.



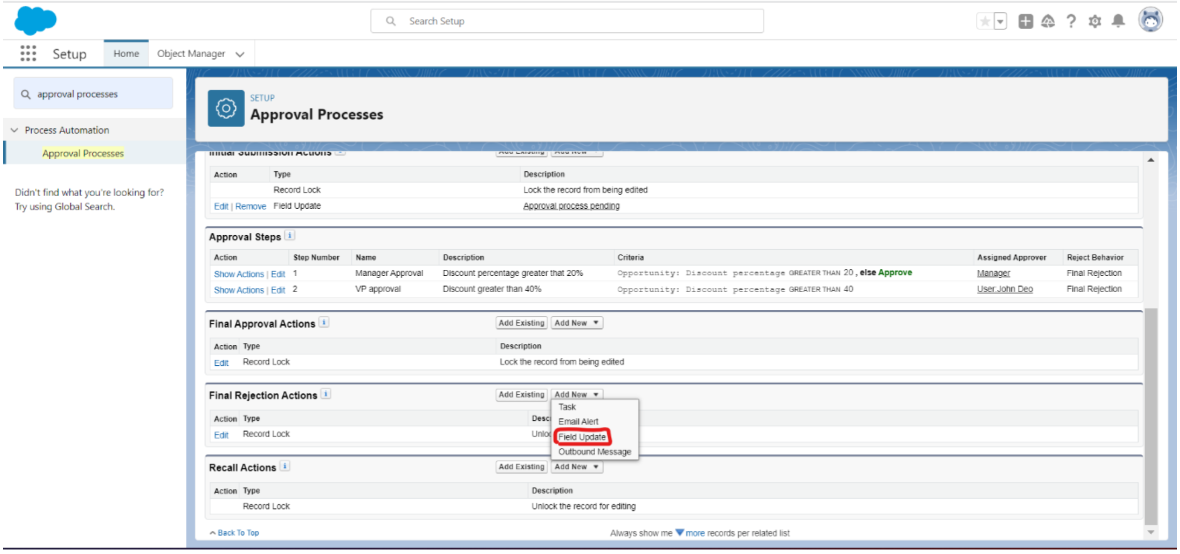
- After that again select 3rd option that is **No, I'll do this later. Take me to the approval process detail page to review what I've just created.** and click on Go.
- Now 2 steps are created.



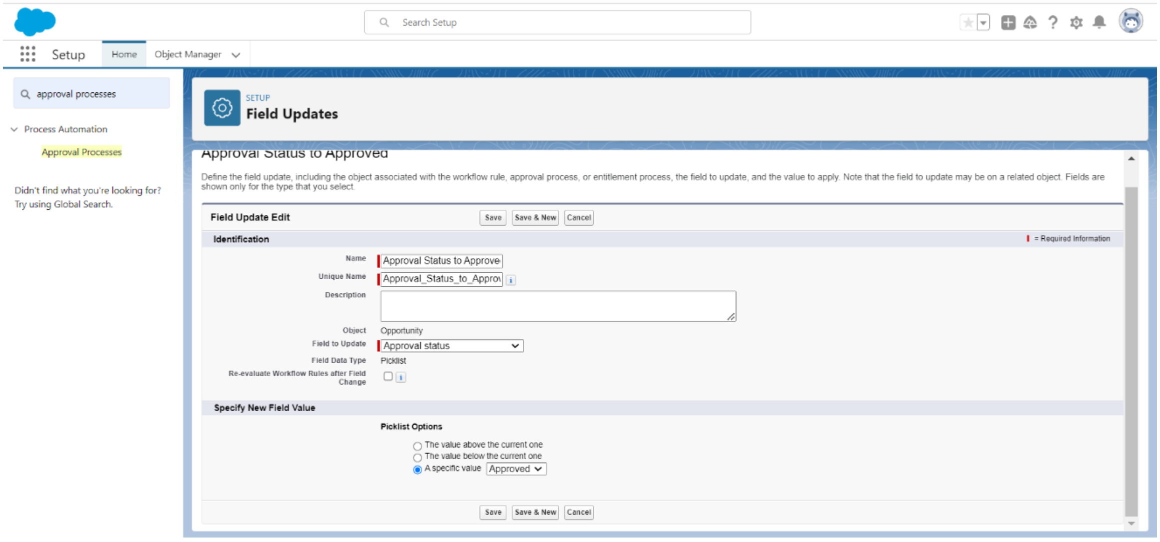
- After that click on Active so, that this approval process will activate.



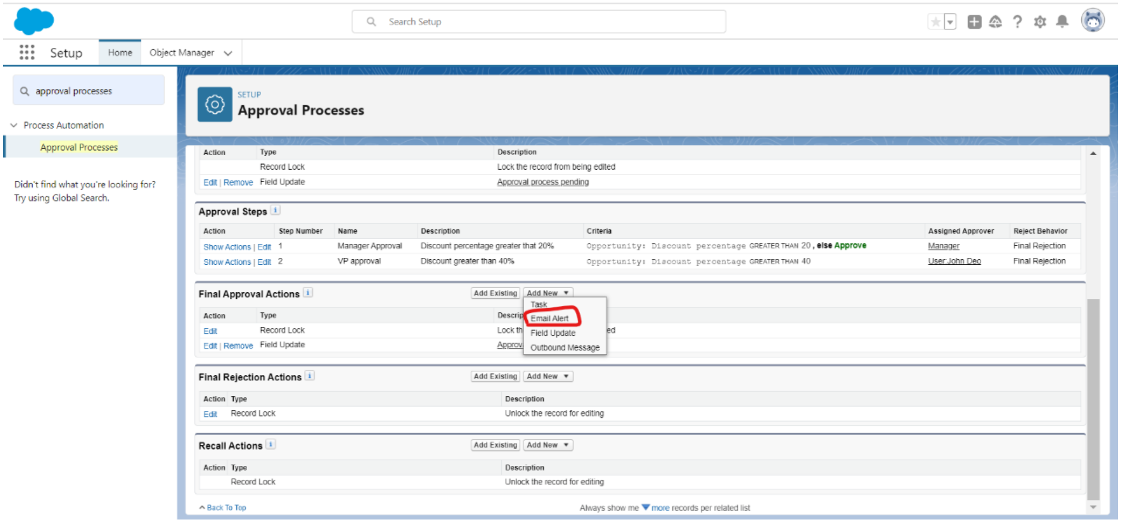
- After activating the process, the Add approval steps is invisible. For add new approval steps we have to deactivate the process after that we can add.
- In 3rd steps we have to create final approval actions. For this we have to select field update **approval status** and select **approved** and email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



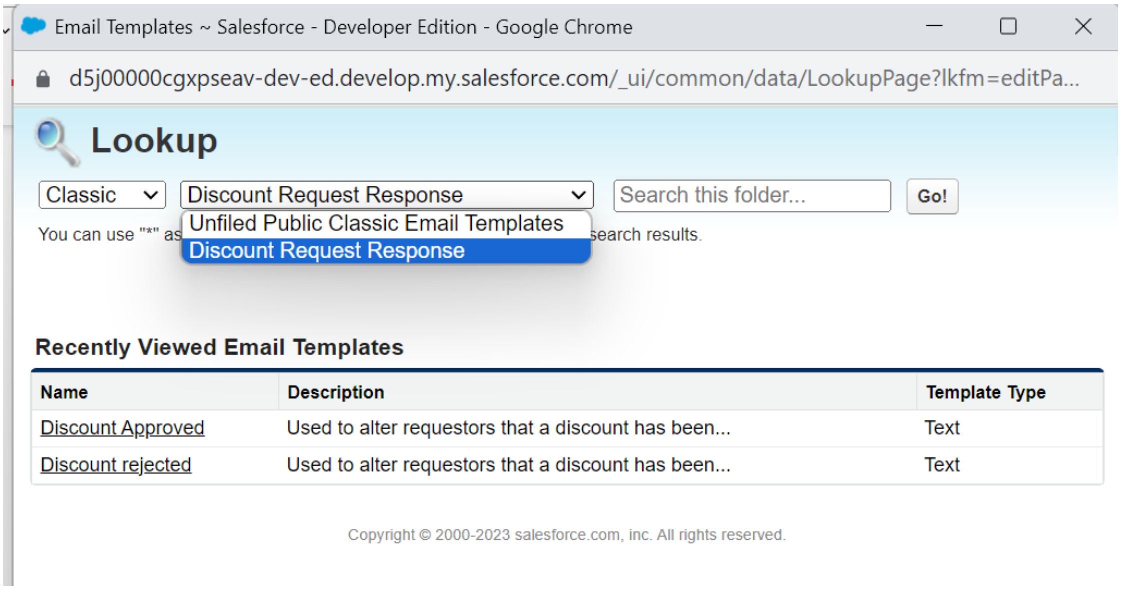
- After that enter the name, unique name, description, and field to update. In field to update we have to select Approval status. And specify new field value select approved because it's a final approval action. After that click on save.



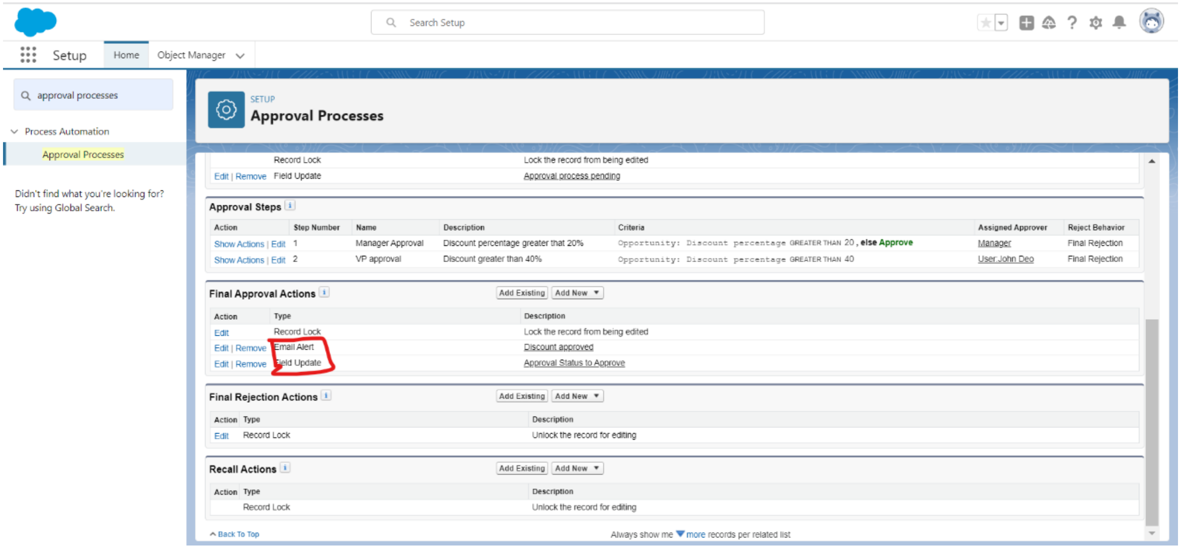
- After that again click on Add new button and this time select Email alert.



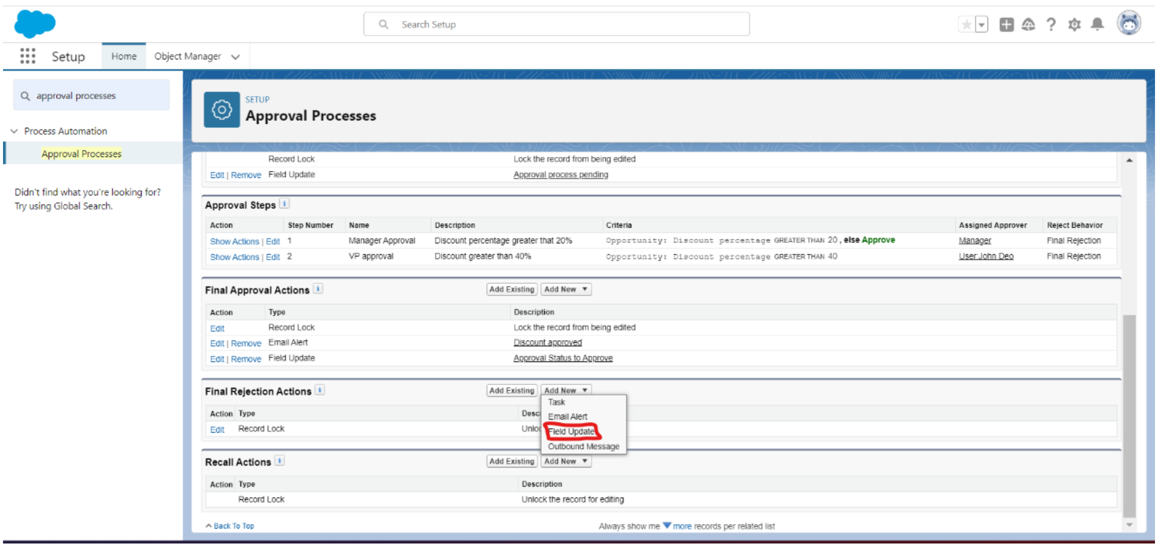
- After that enter description, unique name, email templates for approved which we created in classic email templates.
- Click on search icon in email templates so that all templates will open. One pop-up will open select the folder of the email what we created. after that select discount approved email.



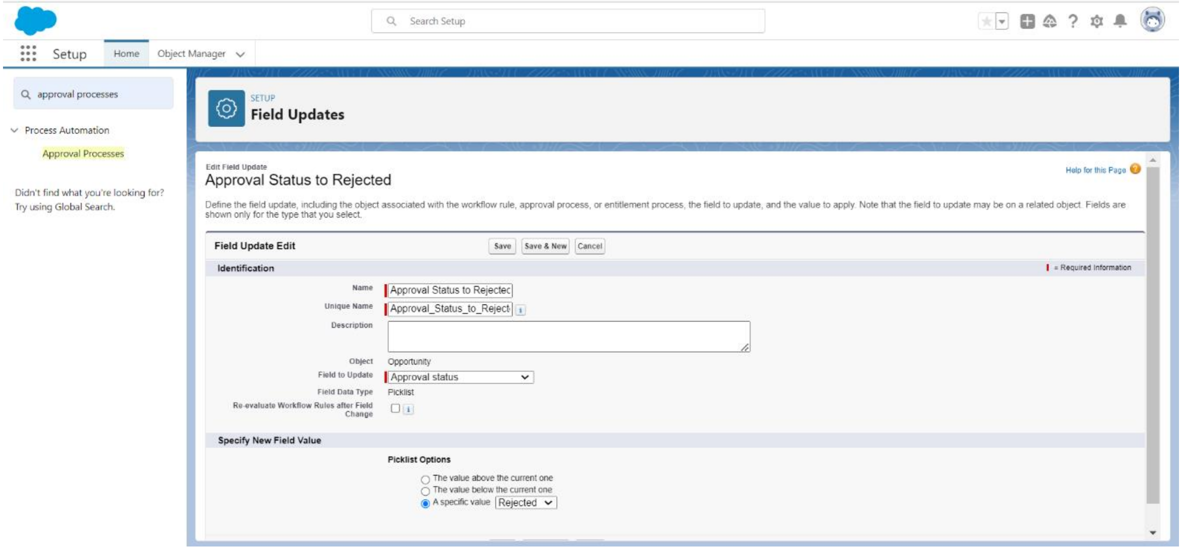
- After that select owner in receipt type and add the opportunity owner. Because owner is one who create the records.
- Now click on save.
- Now email alert and field update is created.



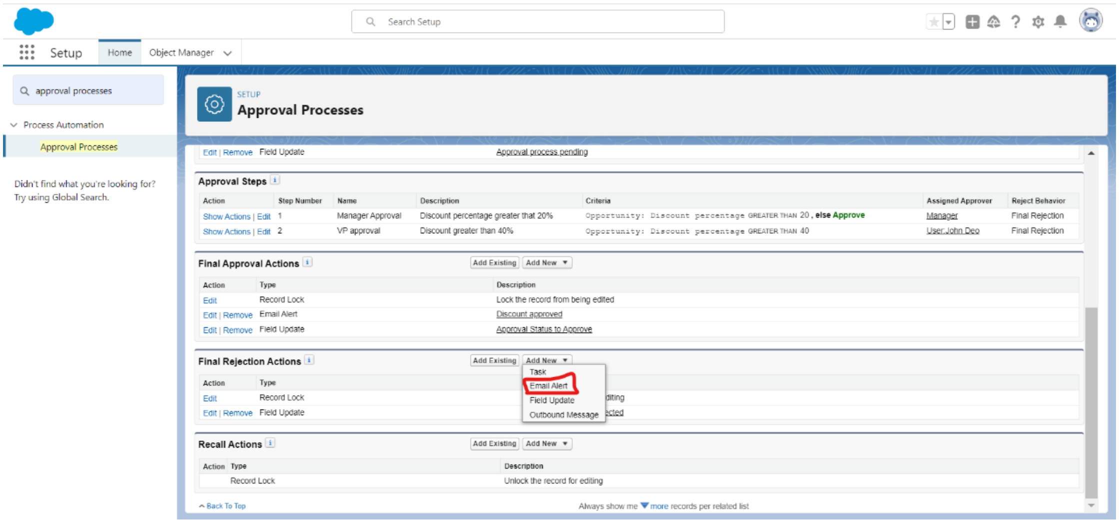
- In 4th steps we have to make **final rejections actions**.
- For this we have to select field update **rejected status** and select **rejects** and email alert which is we created in classic email templates.
- Now, click on Add new button under **final rejection actions**. And select Field update.



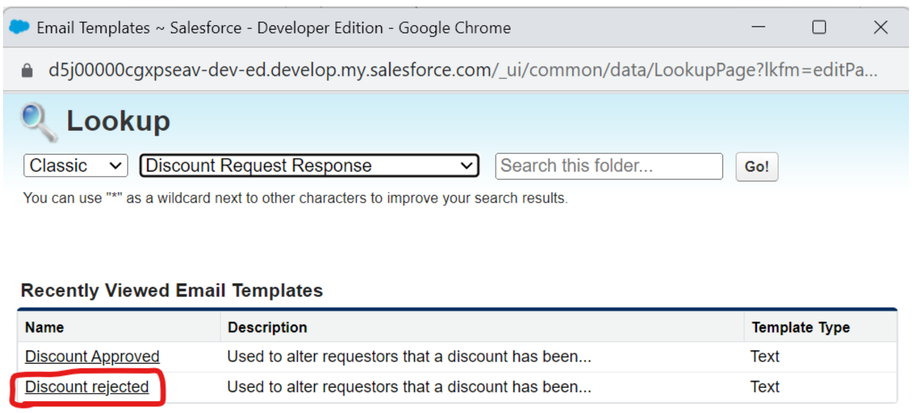
- After that enter the name, unique name, description, and field to update. In field to update we have to select Approval status. And specify new field value select rejected because it's a final rejection action. After that click on save.



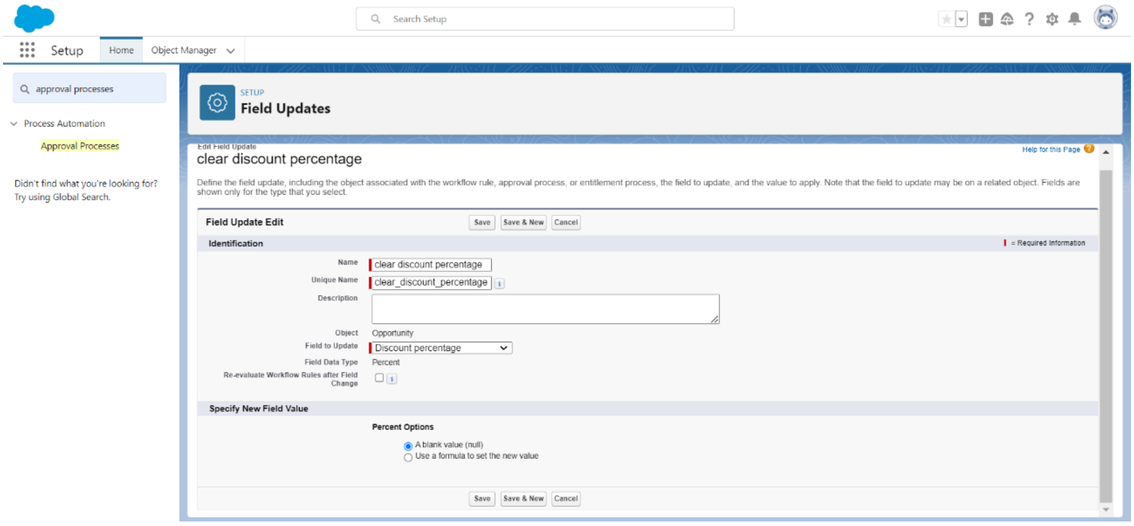
- After that again click on Add new button and this time select Email alert.



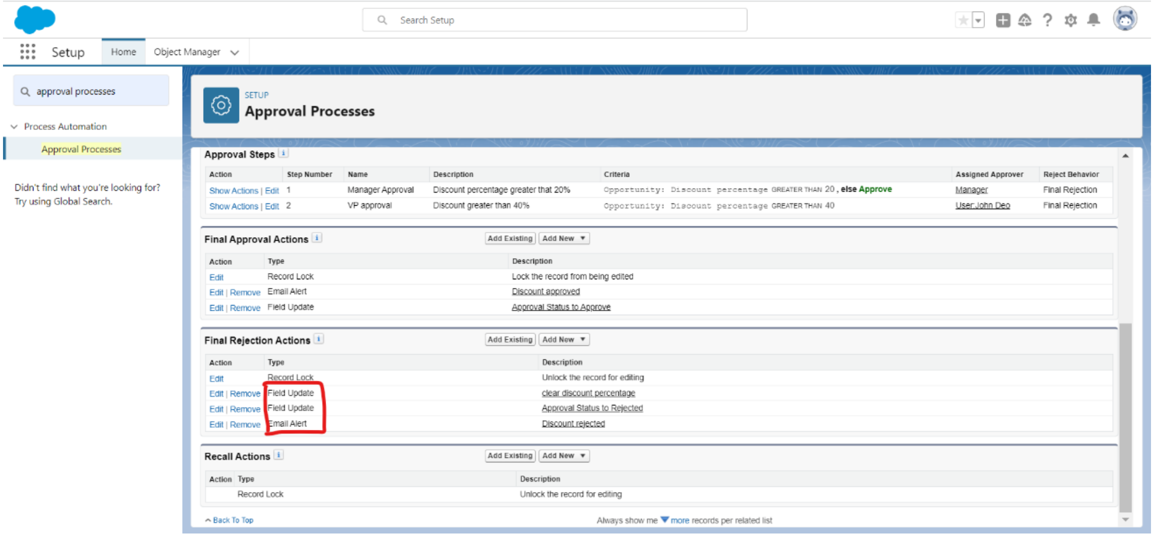
- After that enter description, unique name, email templates for rejected which we created in classic email templates.
- Click on search icon in email templates so that all templates will open. One pop-up will open select the folder of the email what we created. after that select discount rejected email.



- 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.

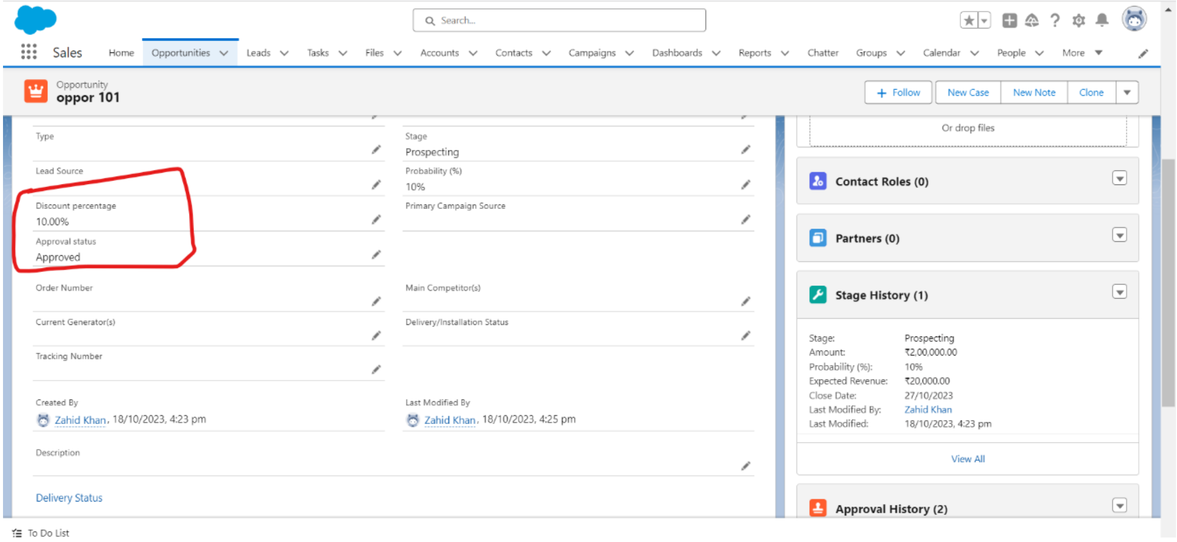


- This way 2 field update and one email alert is created in final rejection actions.



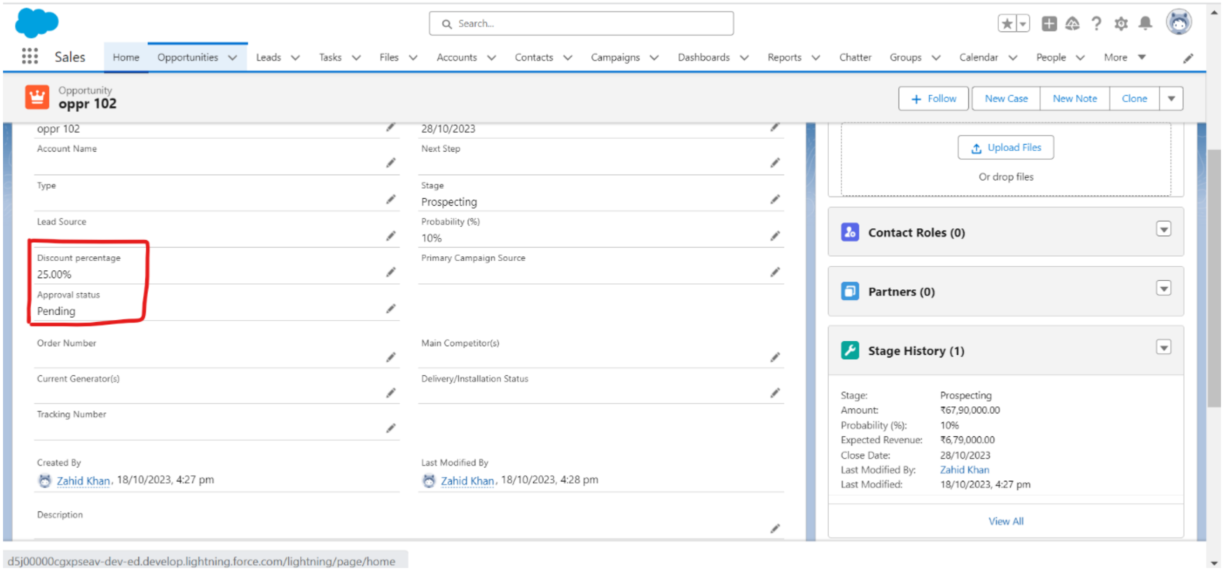
- Now all steps for approval process are completed. It's time to test the results.
- Just go to the front-end of sales app and click on opportunities tab.
- Create one record and enter discount percentage as 10% (less than 20%).

- 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

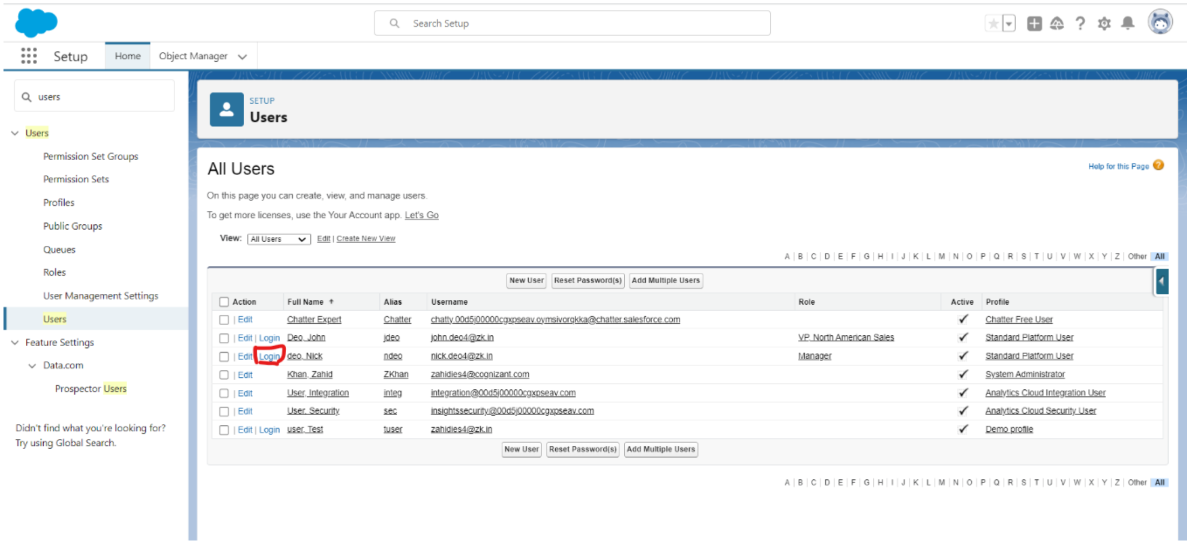


20%.

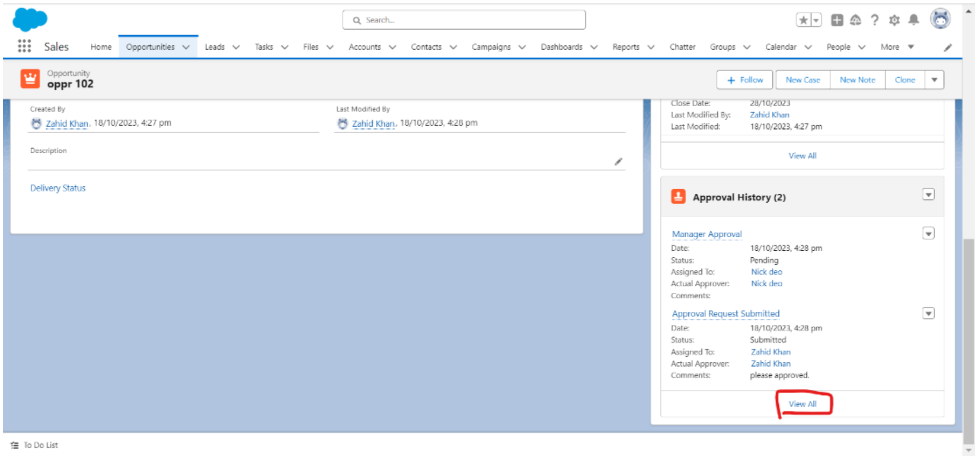
- Now create one new record and enter discount percentage 25% (i.e., greater than 20%). And click on submit for approval. This time its showing pending because manager approval needed.



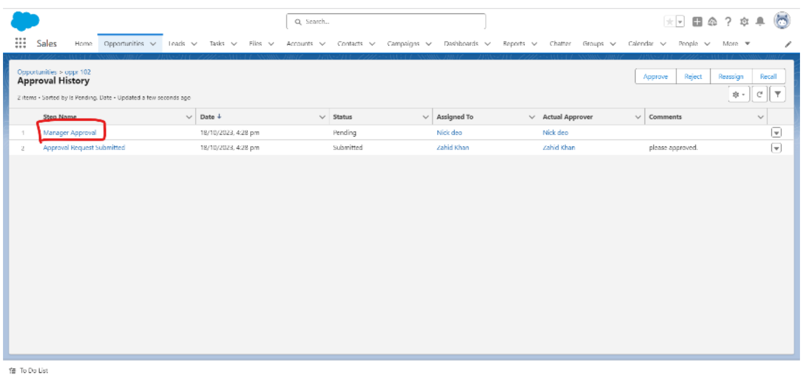
- Now, login the manager account and approved the request. For this go to set up click search for users and click on login beside the nick deo because he is a manager.



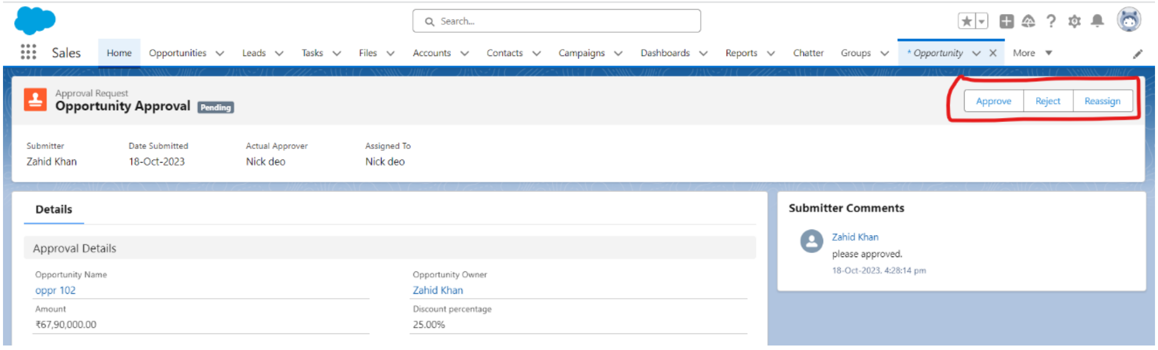
- we can't the see that request in the opportunity in manager account because we use free license, but this is the process only.
- Here, we are a system administrator so we can also approve the request. For this go the front end of the sales app in system administrator account and click on opportunities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



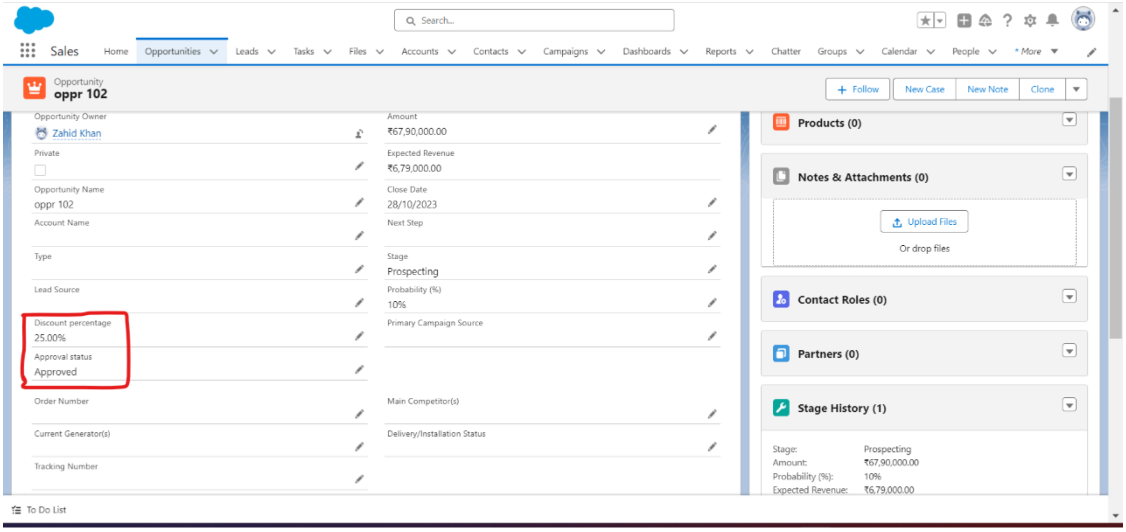
- After that click on manager approval



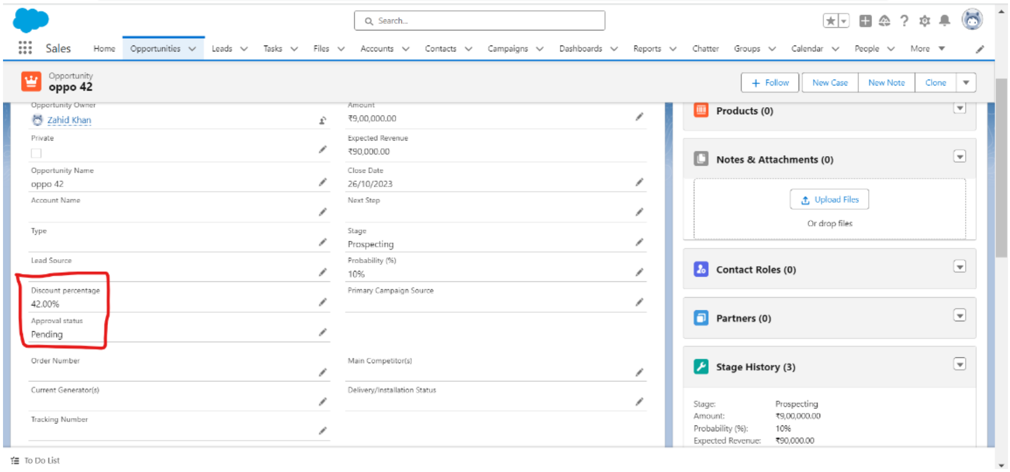
- After that we get 3 buttons approved, reject and reassign. We can do anything because we are a system administrator.



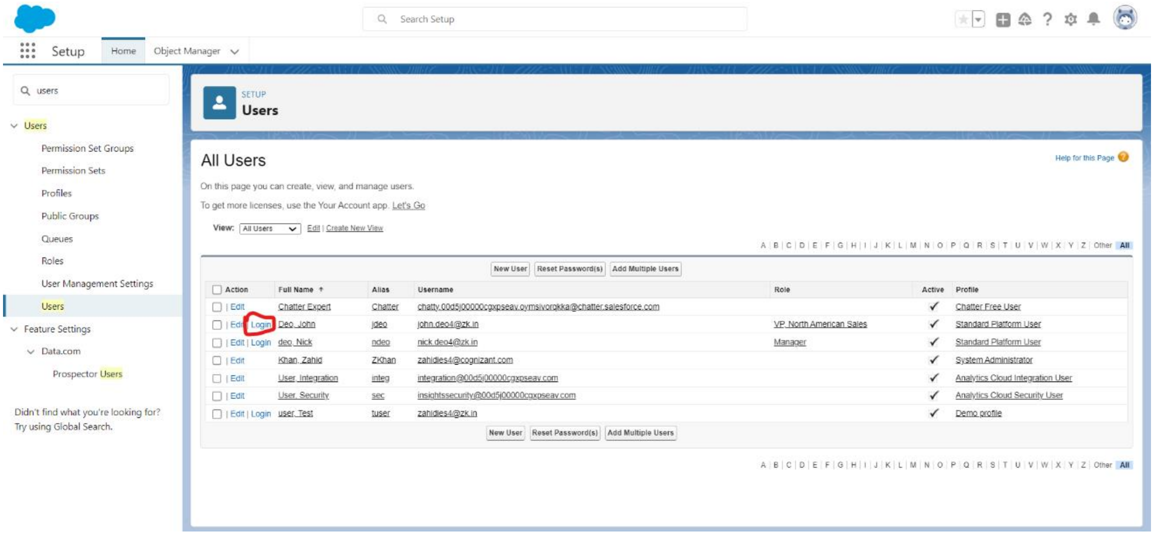
- Here, we are approved the request because its greater than 20%. Now its approved. If we have access to manager app so that manager will approve that.



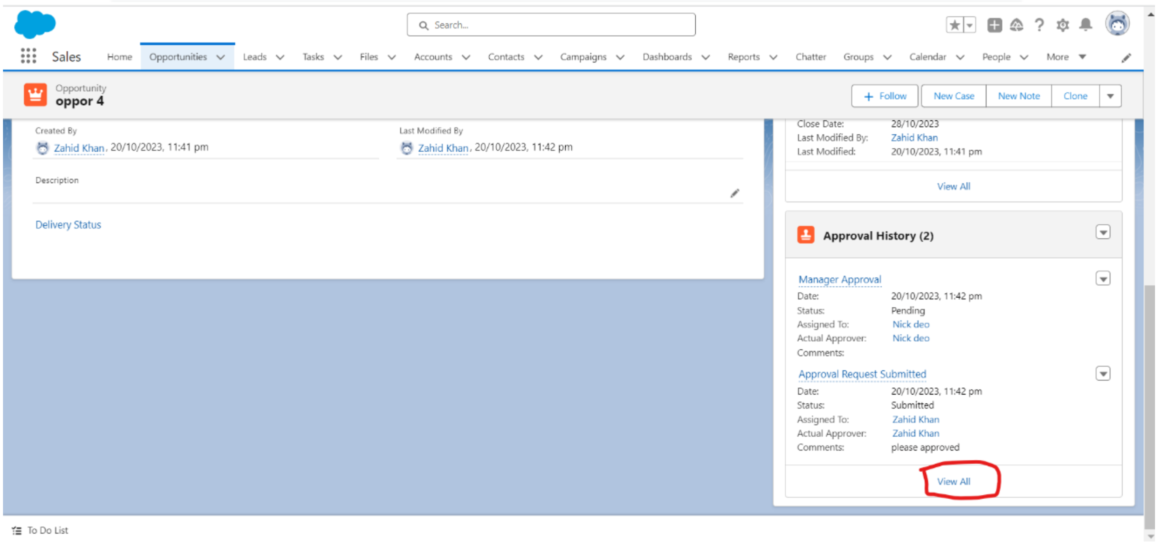
- Now, create new records in opportunities object and this time enter discount more that 40%. (I.e., 42%). And click on submit for approval. This time its showing pending because VP approval needed.



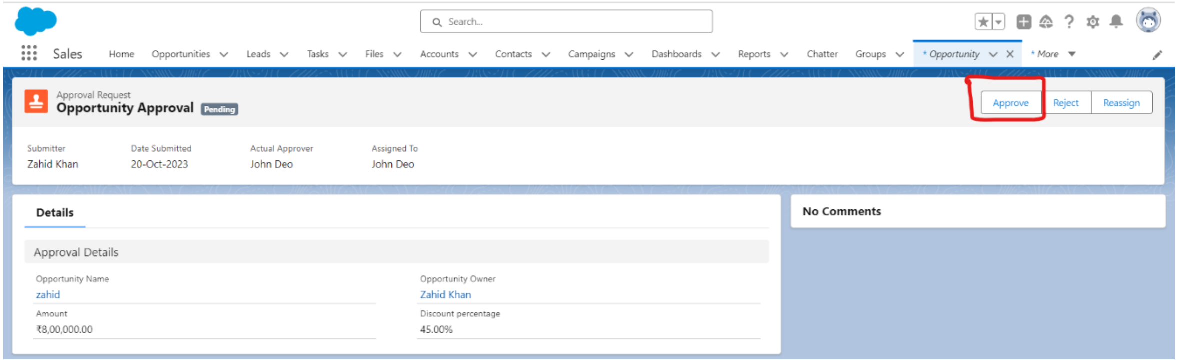
- Now, login the VP account and approved the request. For this go to set up click search for users and click on login beside the john deo because he is a VP.



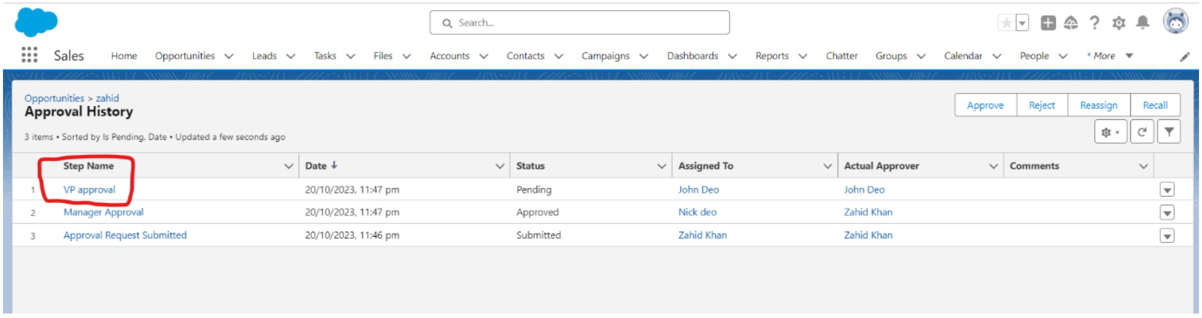
- we can't the see that request in the opportunity in VP account because we use free license, but this is the process only.
- Here, we are a system administrator so we can also approve the request. For this go the front end of the sales app in system administrator account and click on opportunities tab.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



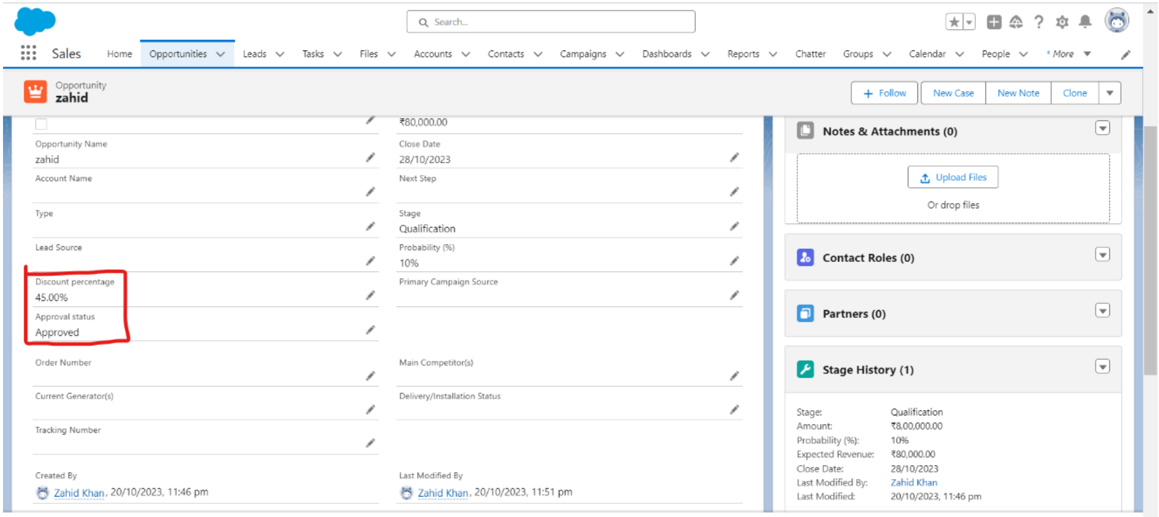
- Now in below image we can see that this show manager approval 1st because it's a hierarchy. 1st managers have to approve the request after that it goes to VP and after that VP will approve the request. So, 1st click on manager approval and approved by clicking on approved button.
- Now it goes to VP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



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



- After that this request status will show approved.



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

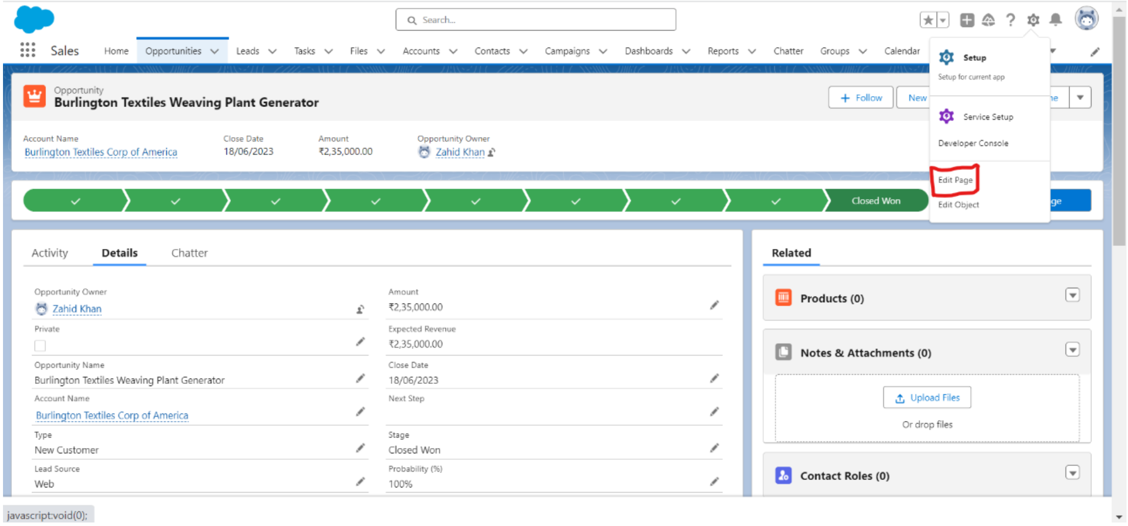
Day-15

Dynamic Form

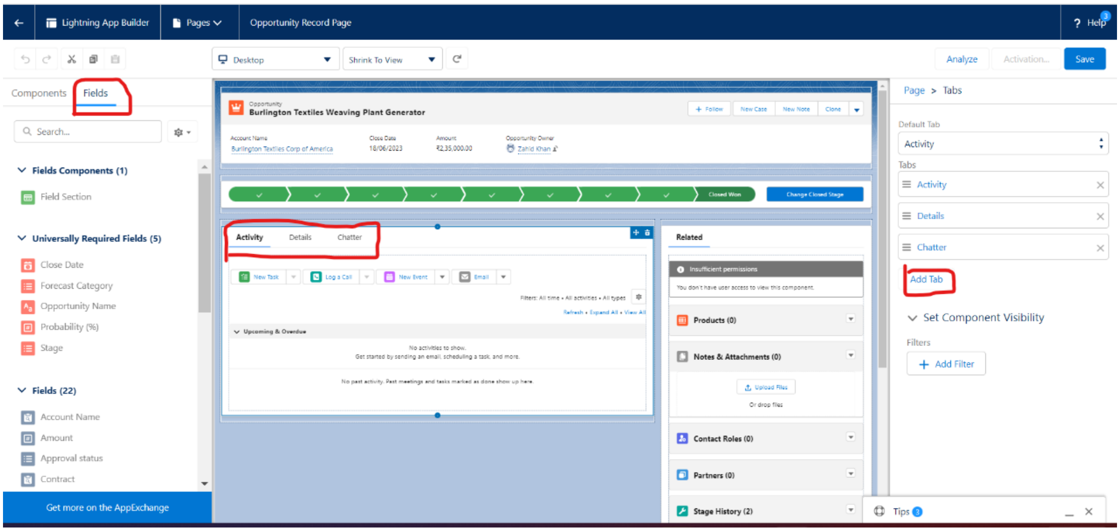
- We can create dynamic form in our record details page.
- dynamic form is same as our page layout, but we can add the field which want to show in dynamic form.
- We can add dynamic form using record type lighting page.

steps to create dynamic form:

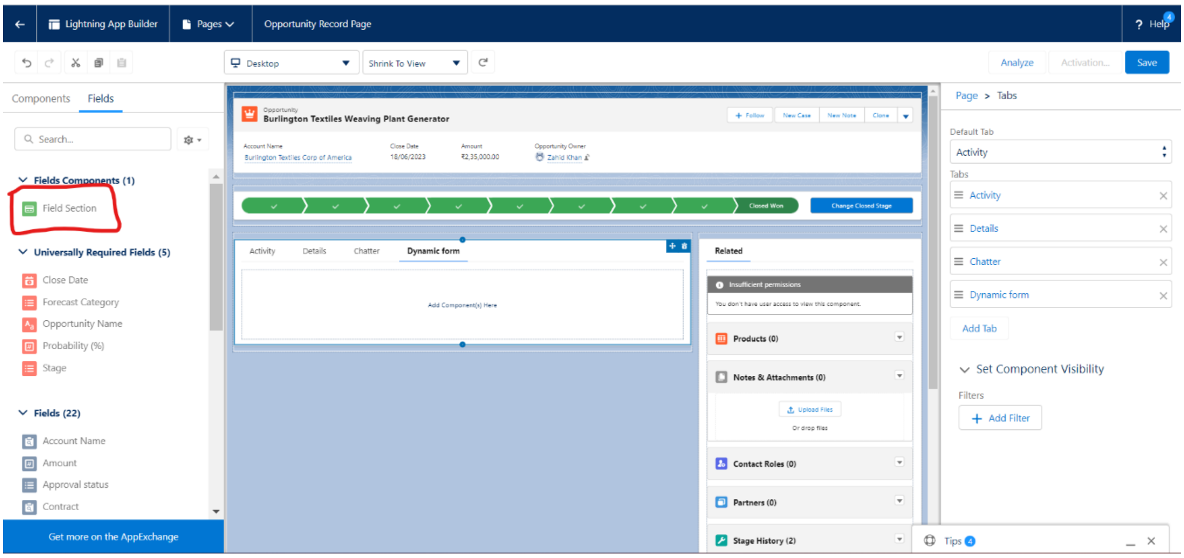
- 1st go to the details of any records of the object. For example, we are going to make dynamic form of opportunities object.
- Open any records in opportunities tab. After that click on the set-up icon and click on edit page.



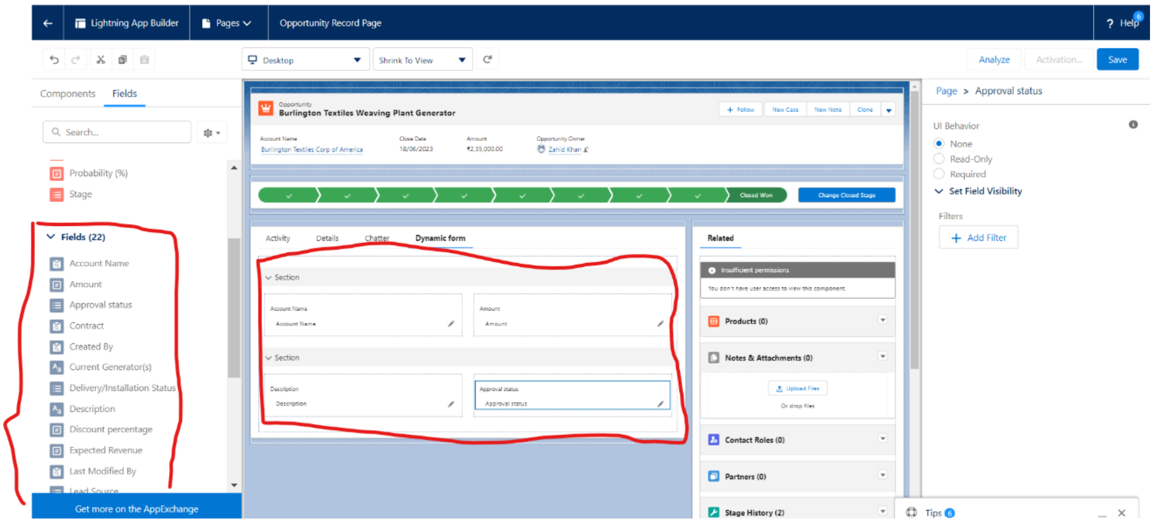
- After that we 2 options components and fields on left hand side. Click on fields.
- After that click on the details tab so that we can create new tab named as dynamic form. click on Add tab so that we can create new tab.



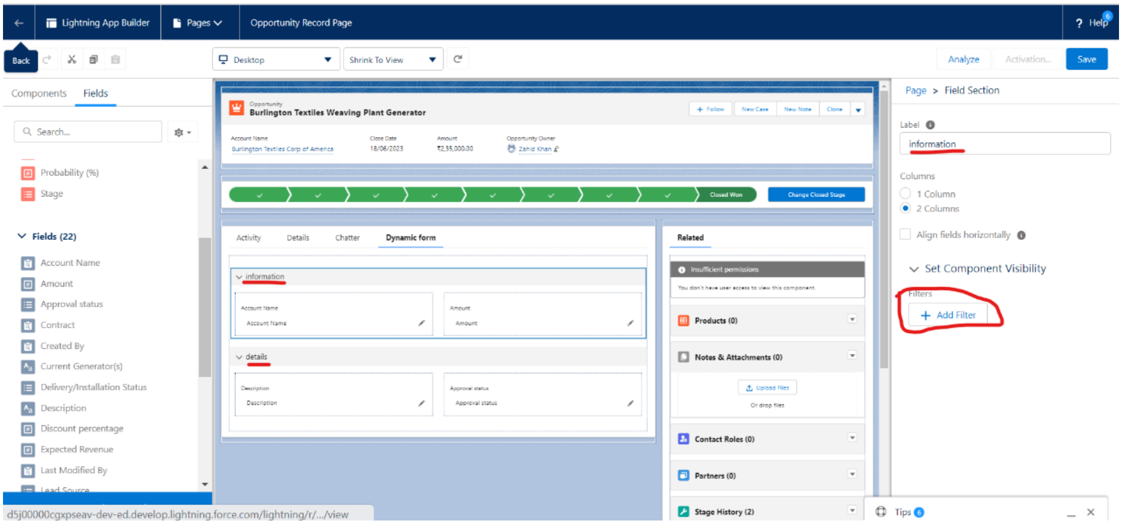
- After that create a custom tab named as dynamic form.
- In dynamic form tab we can add the field same as page layout for this select **field section** and drag it inside the dynamic form tab.



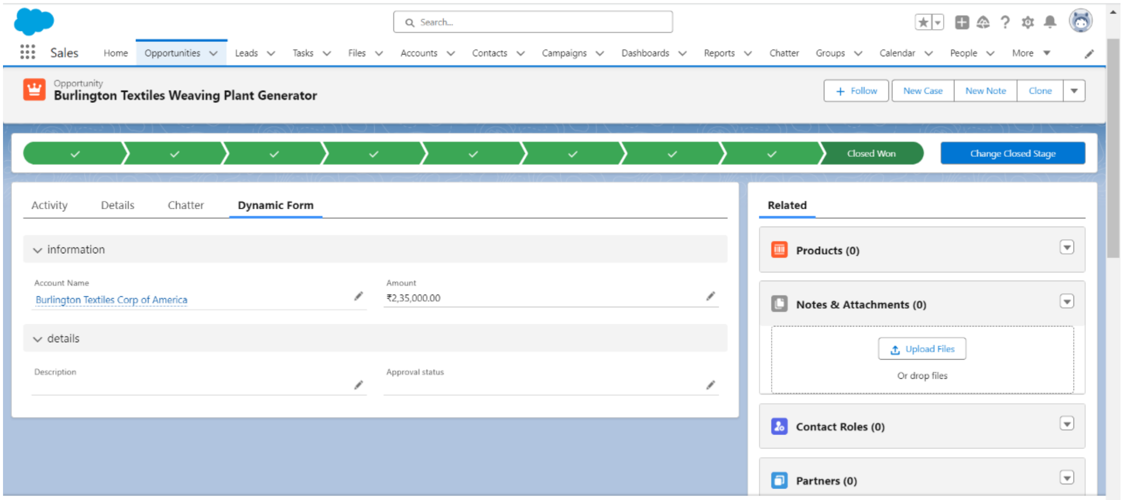
- Now section is added, and we have 2 section we can add any field from fields options.
- Just select the field and drag it inside the field section.



- 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.

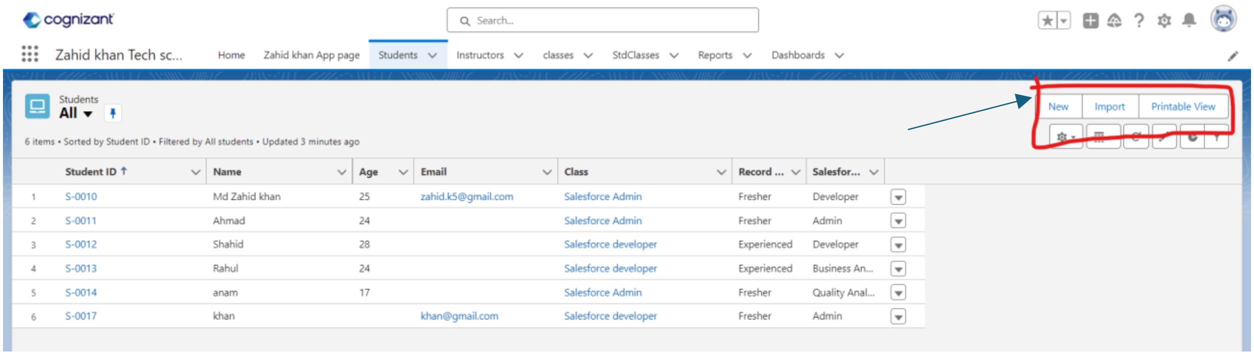


- now click on save and activate the page. After that check the results by opening the any record of opportunities object.



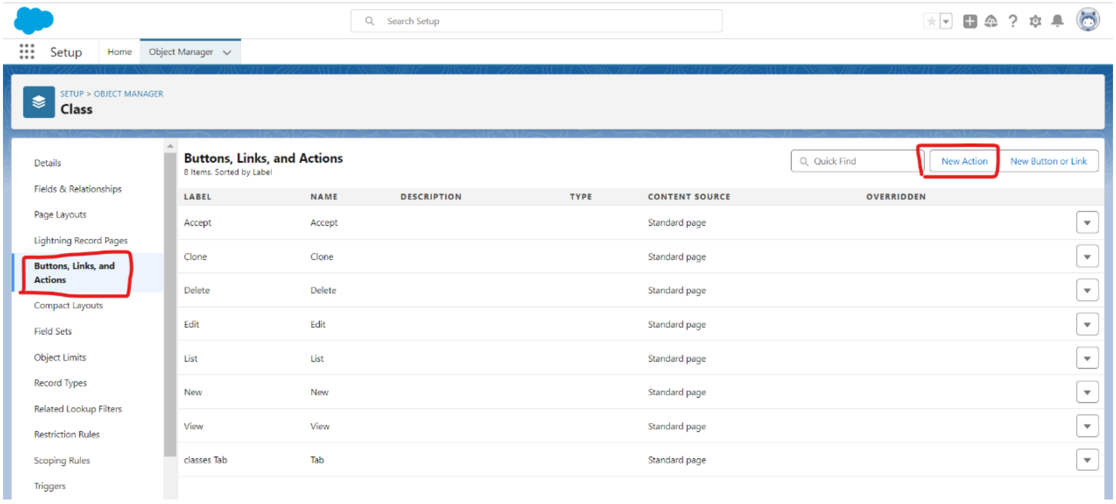
Quick Action

- 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.

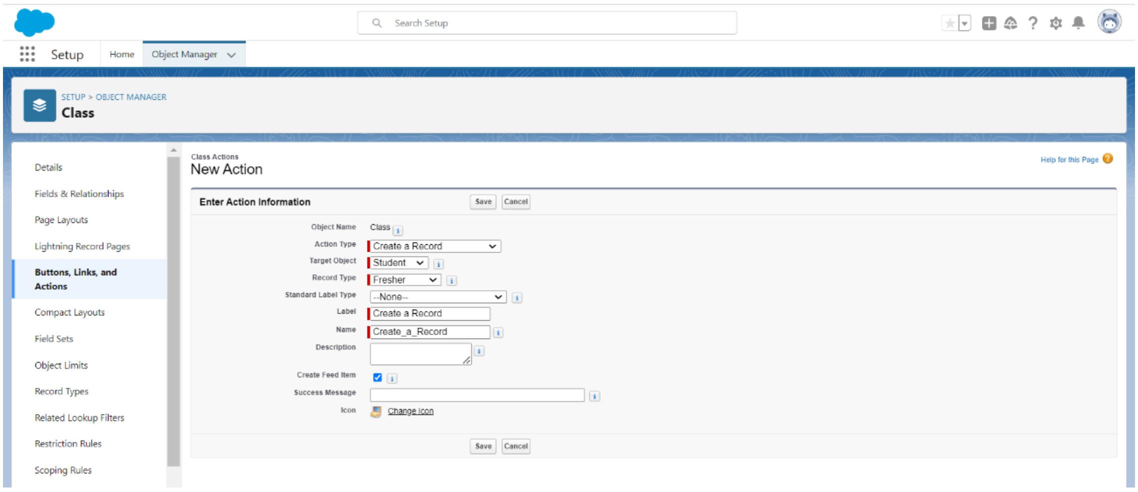


<u>Steps to create quick action or object specific action:</u>

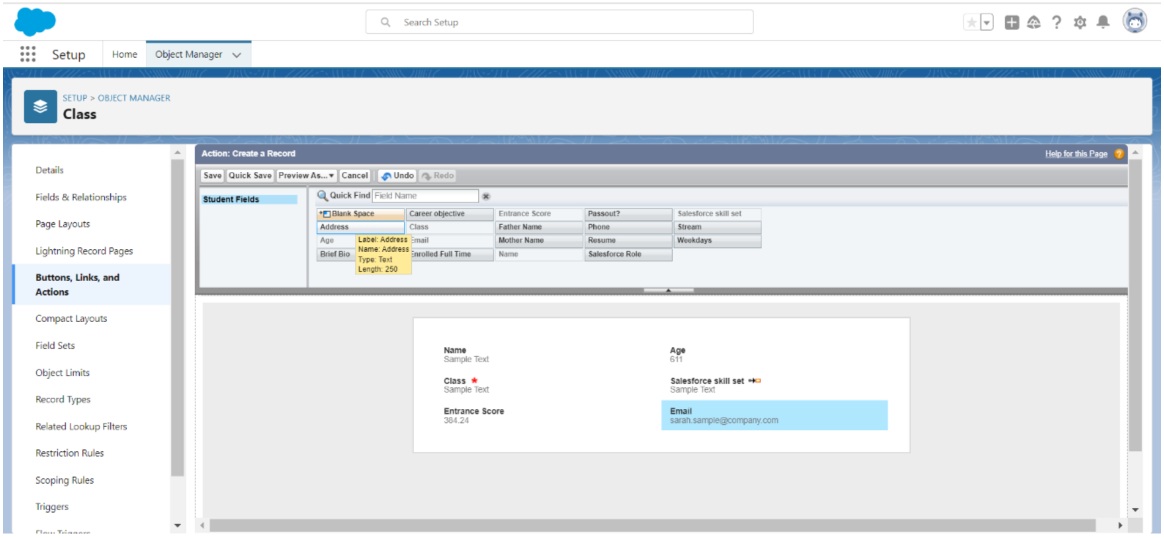
- For example, we are going to create a quick action in class object and attached it to the student object. So, when we click new student (custom) button in class object its redirect to the student object.
- Now, go to the object manager and search for class object because we are going to create quick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



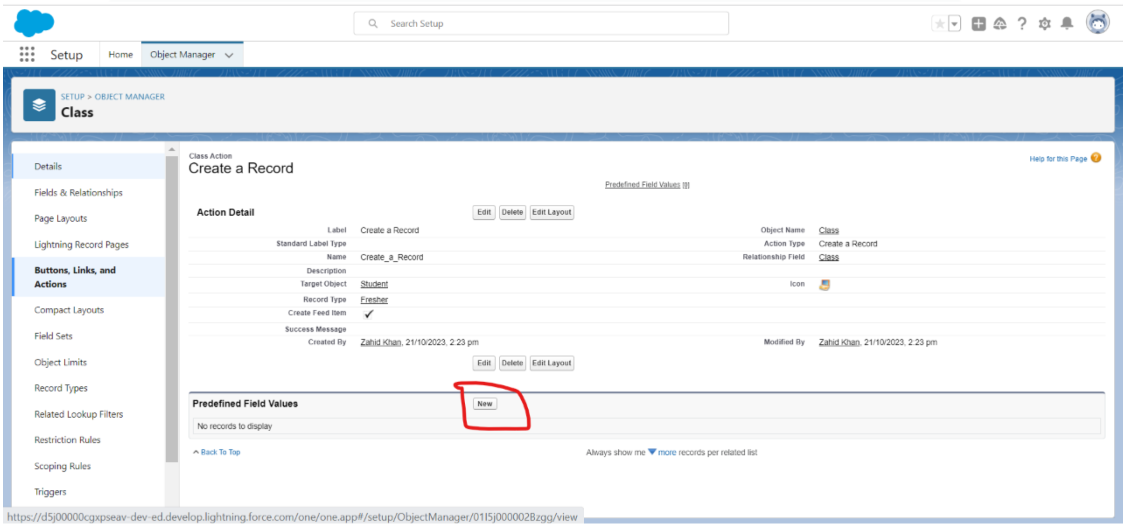
- After that enter the action type, we have lot of options, but we choose to create a record. After that enter the target object i.e., student.
- After that we have to choose record type because we have 2-page layout for student object fresher layout, experienced layout. Here, we are choosing fresher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



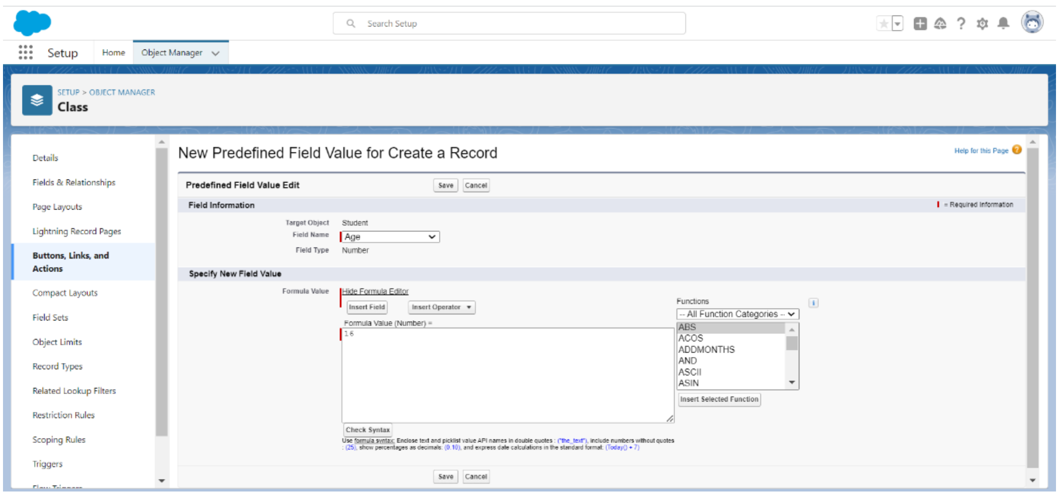
- After that one page will open and we have to enter the field like which field should be display when we click on this quick action button.
- Just select and drag the field. And always enter that field which has validation rule. Otherwise, it gives error.



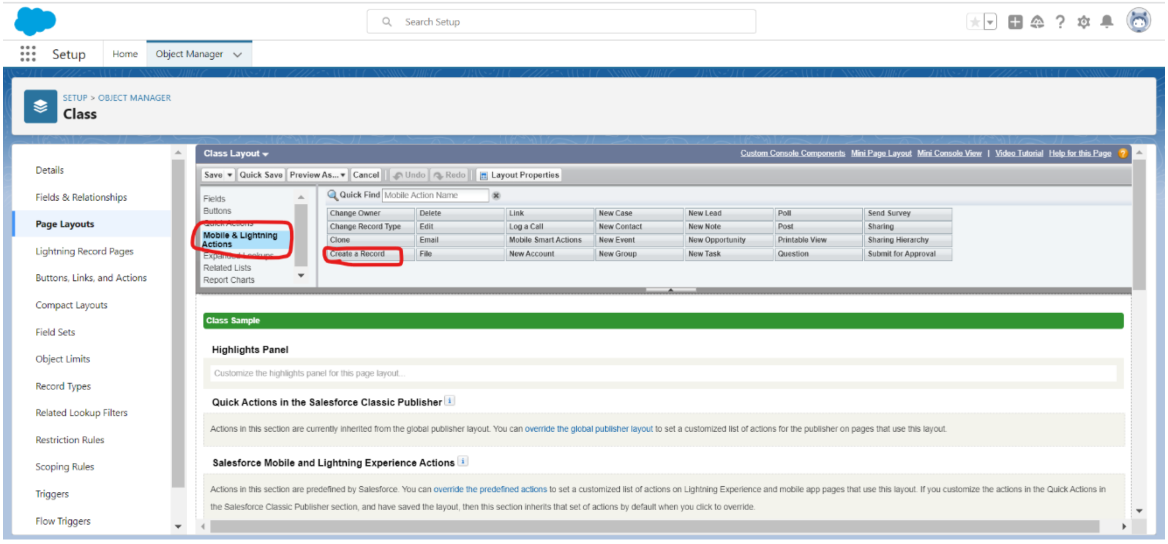
- click on save. Now quick action is created. we can also enter predefined field by on new button inside predefined field types.



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

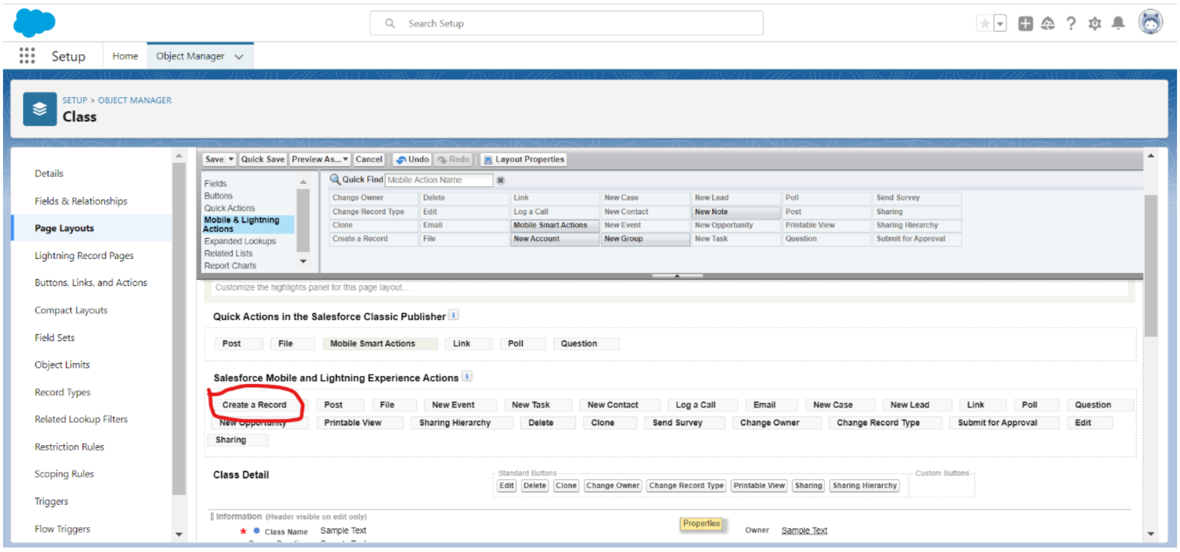


- After that we have to insert this newly created quick action button to the page. For this click on page layout of the class object and click on mobile and lighting action. Inside this we can find our newly created quick action i.e., create a

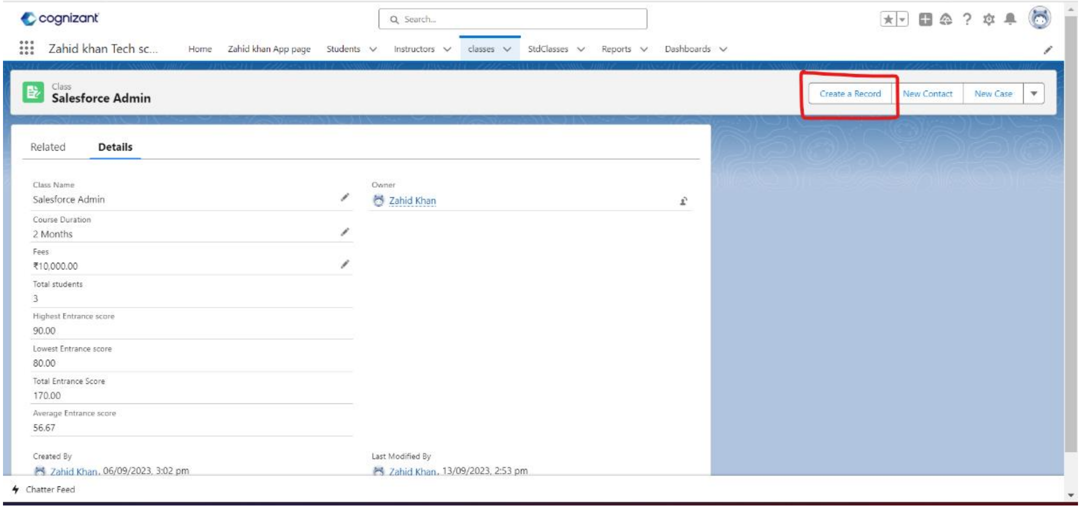


record.

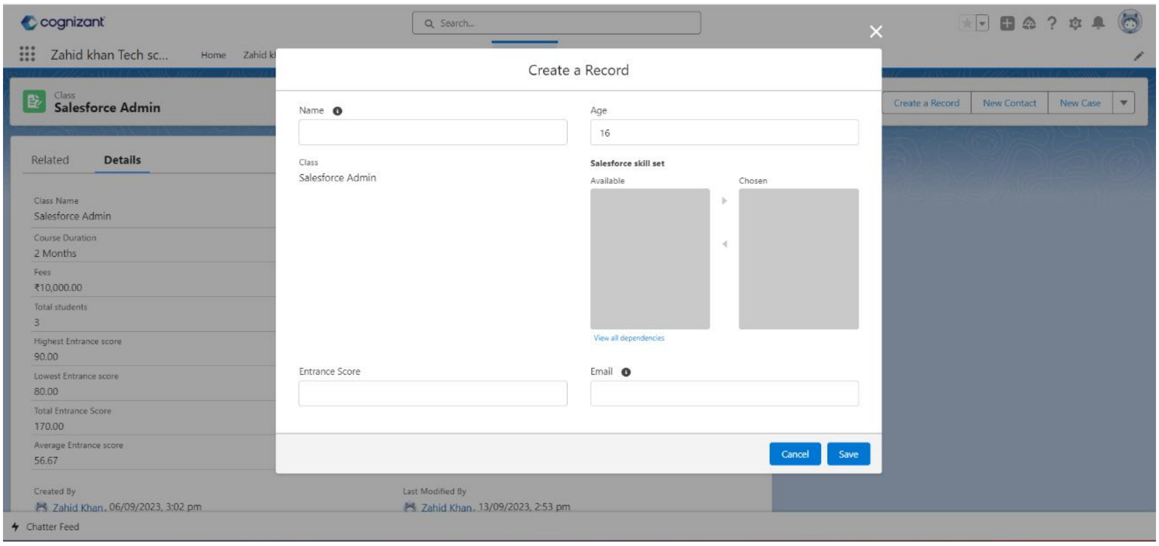
- After that click **on override the predefined actions** inside the salesforce mobile and lighting experience actions.
- Just select the quick action i.e., create a record and insert inside the salesforce mobile and lighting experience actions. And click on save.



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



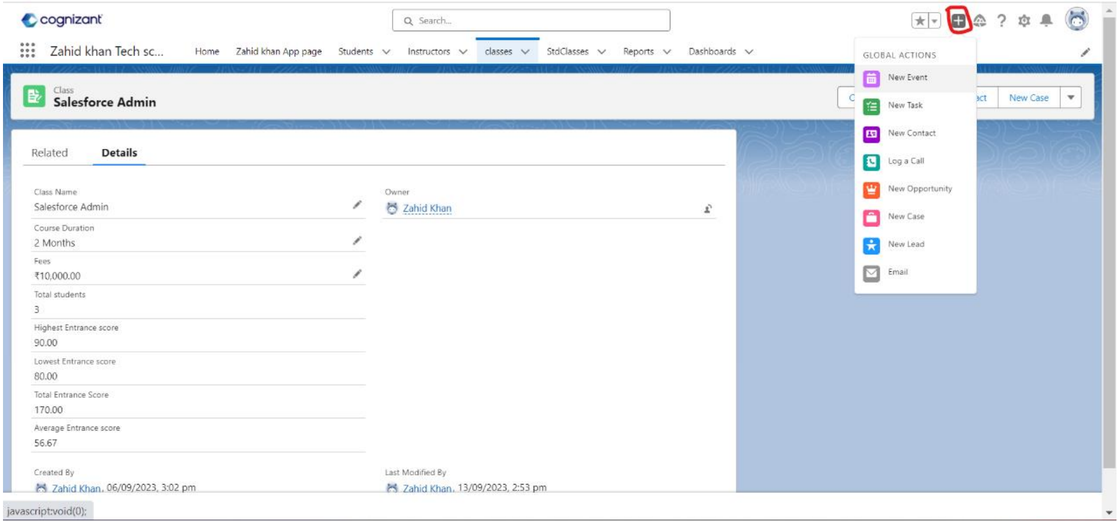
- When we click on create a record new form will open with those field which we insert and also predefined field.



- 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

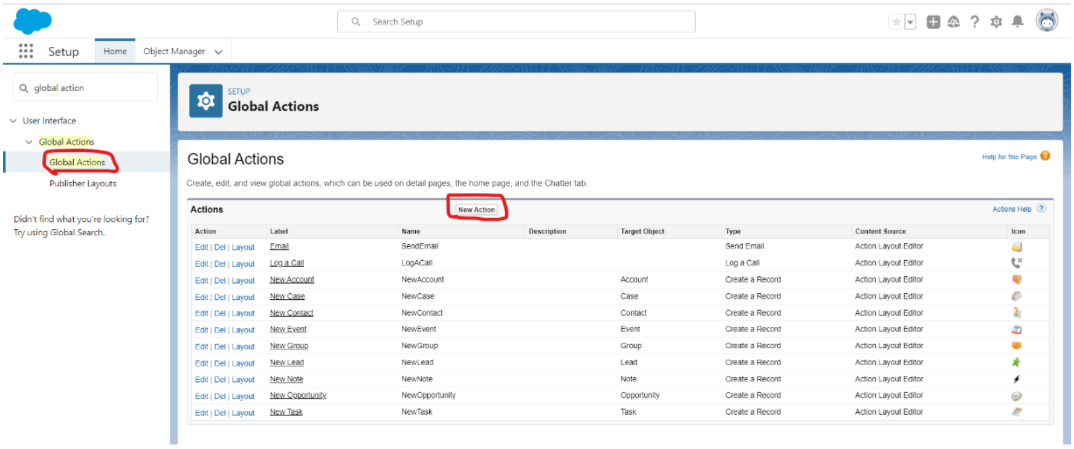
- global actions mean we can create a record for any object without opening that object tab.
- By clicking on the + icon on top of the screen we can see the global actions options. Inside, this + icon we can see the number of options.



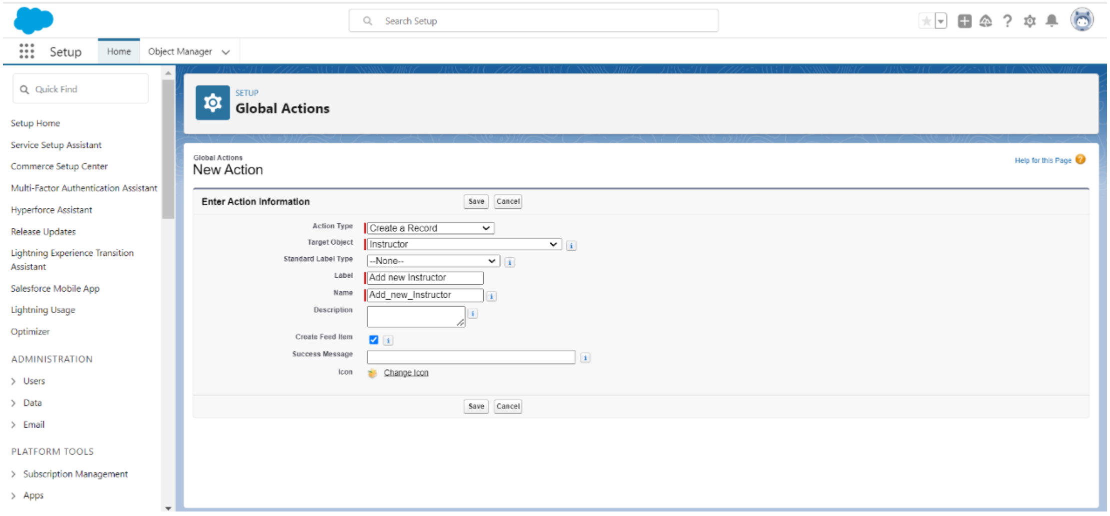
- these are pre-defined global actions. We can also add global actions as per our requirements.

Steps to create global actions:

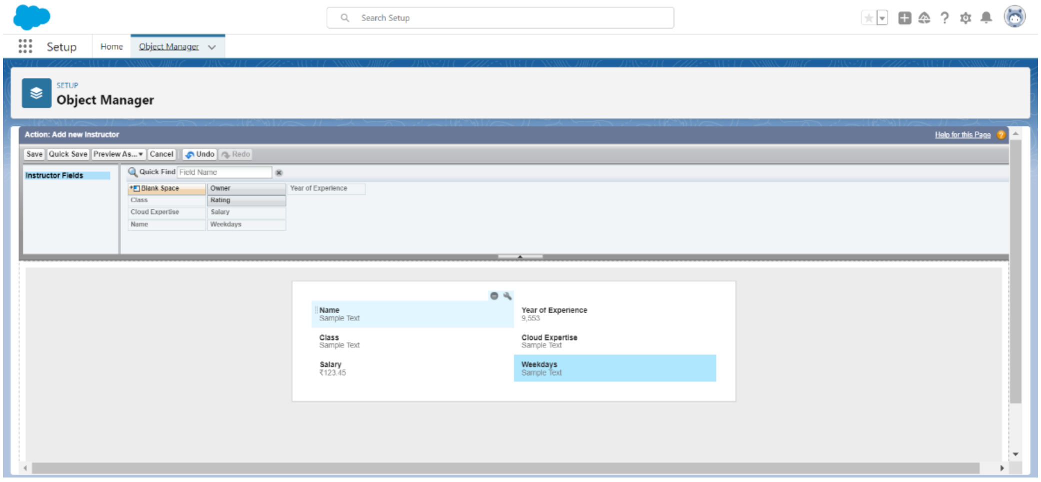
- Here, we want to create global actions for instructor object.
- Click on setup and go the home. Search for global actions in quick search. After that click on new action.



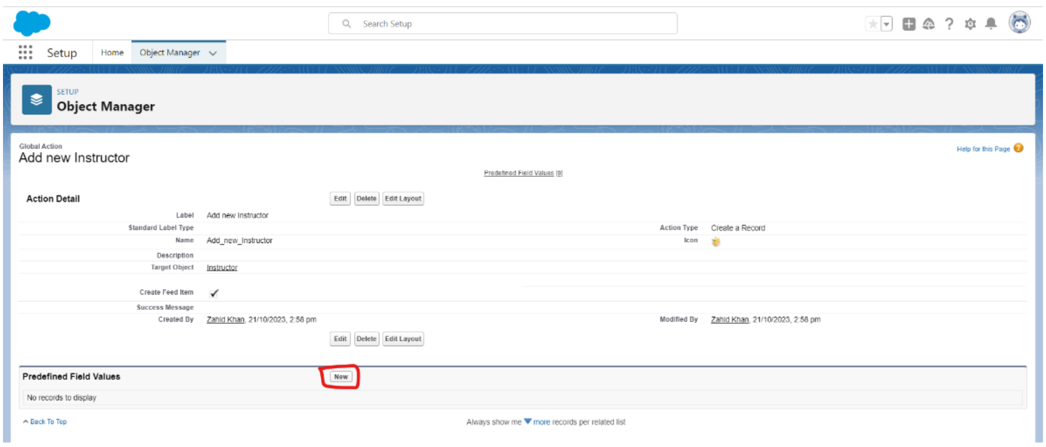
- After that choose the action type same as quick action. Here, we are selecting create a record.
- After that select target object as Instructor and label and click on save.



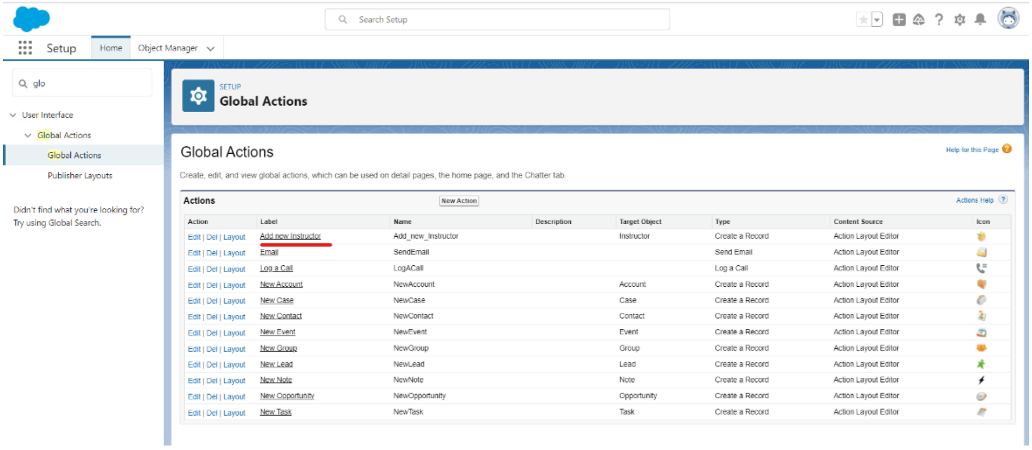
- after that we page will open, we have to choose the field like which field will be visible when we click on this global action button.
- Just select the field and drag it to the blank space. And click on save.



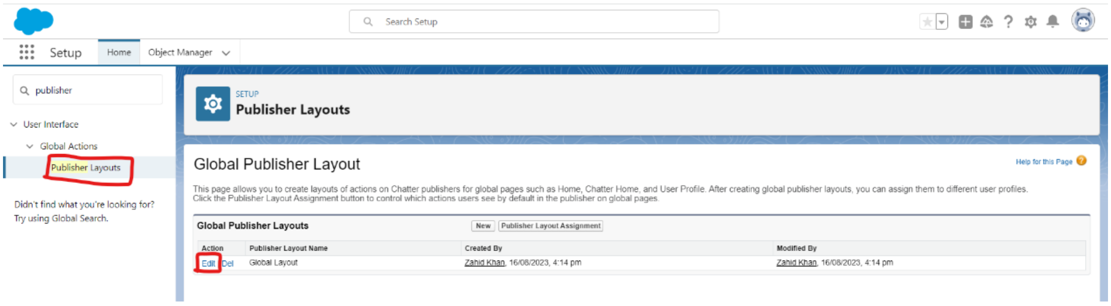
- We can also add pre-defined field values by clicking on new button same as quick action.



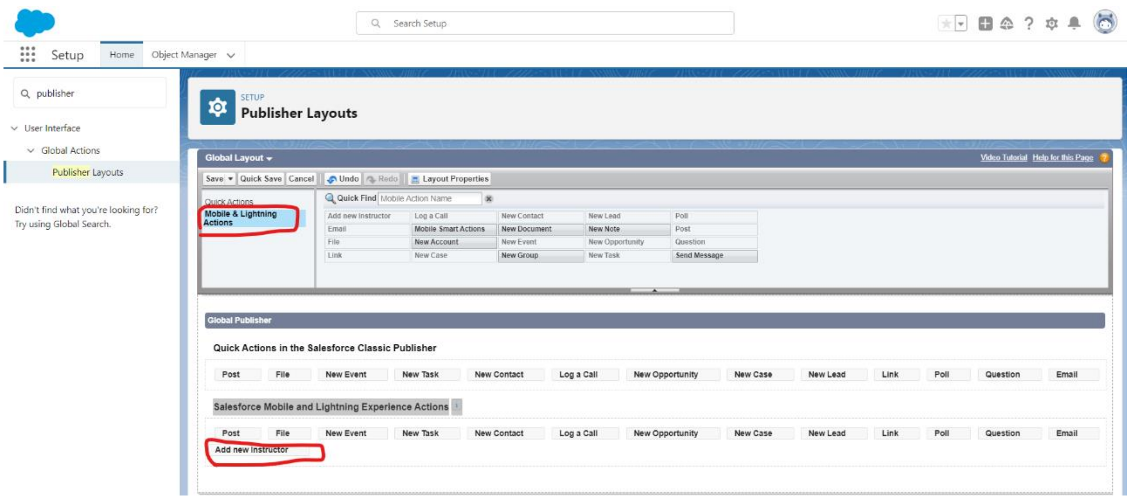
- Now go to home and again search for global action so that we can see our newly created global action.



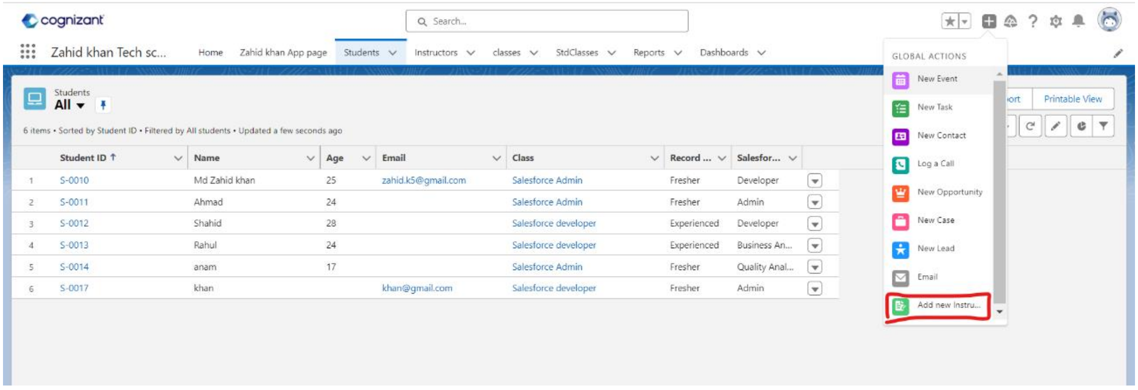
- Now search for publish layout in quick search box. And click on it.
- After that click on edit option beside the global layout.



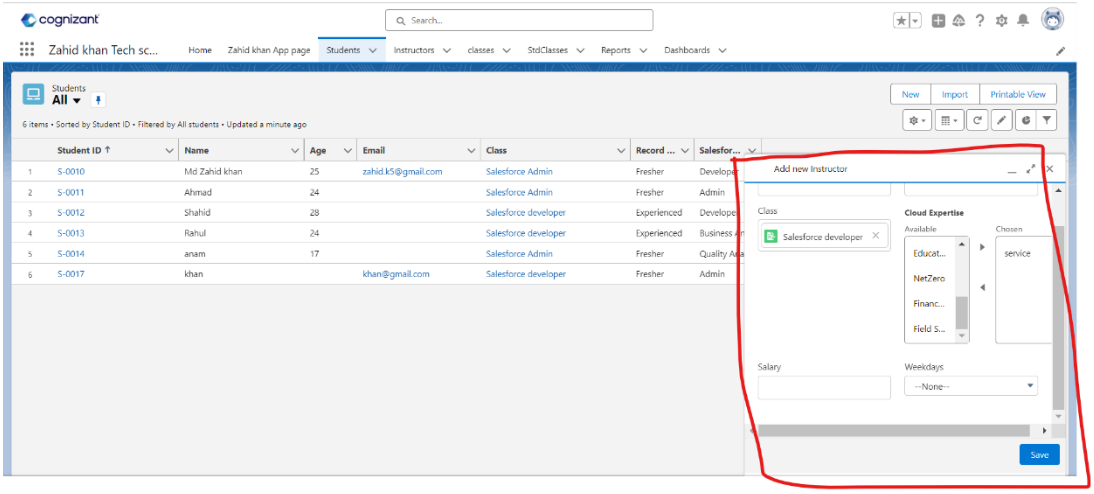
- After that click on mobile & lighting actions.
- Now select the newly created global action i.e., Add new instructor and drag it inside the Salesforce Mobile and Lightning Experience Actions and click on save.



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



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

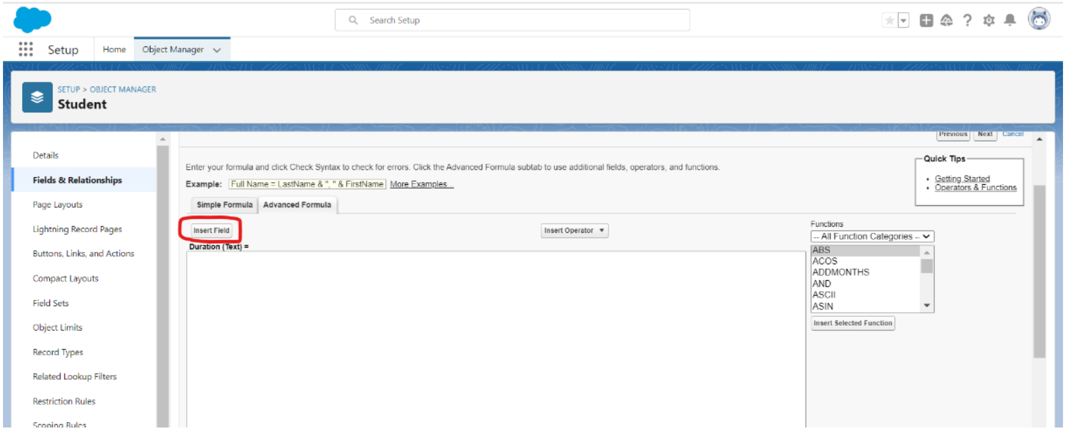


Cross object formula

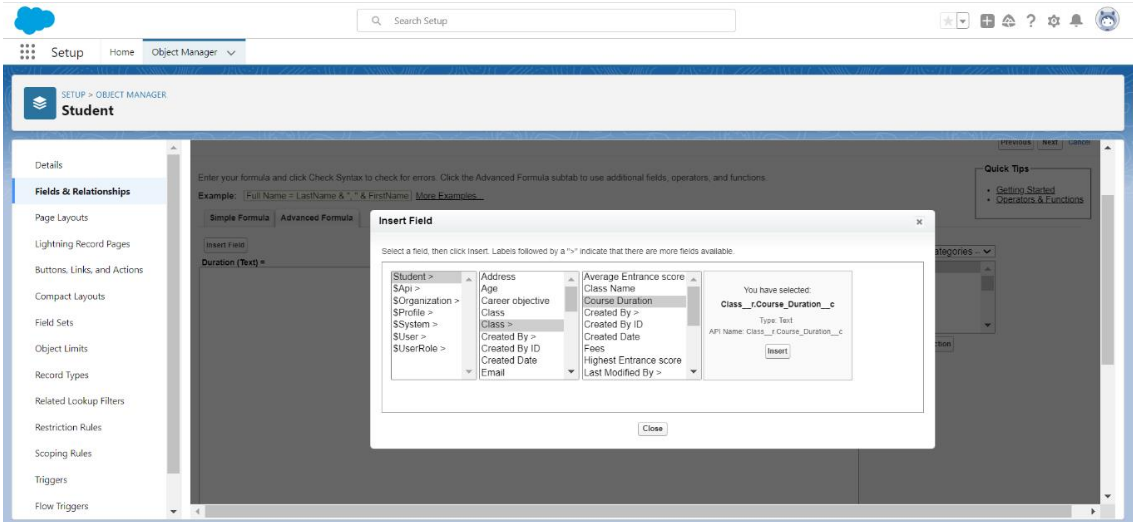
- Cross object formula is used to show the data of the parent object inside the child object. But they should have a relationship between them.

Steps to create cross object formula:

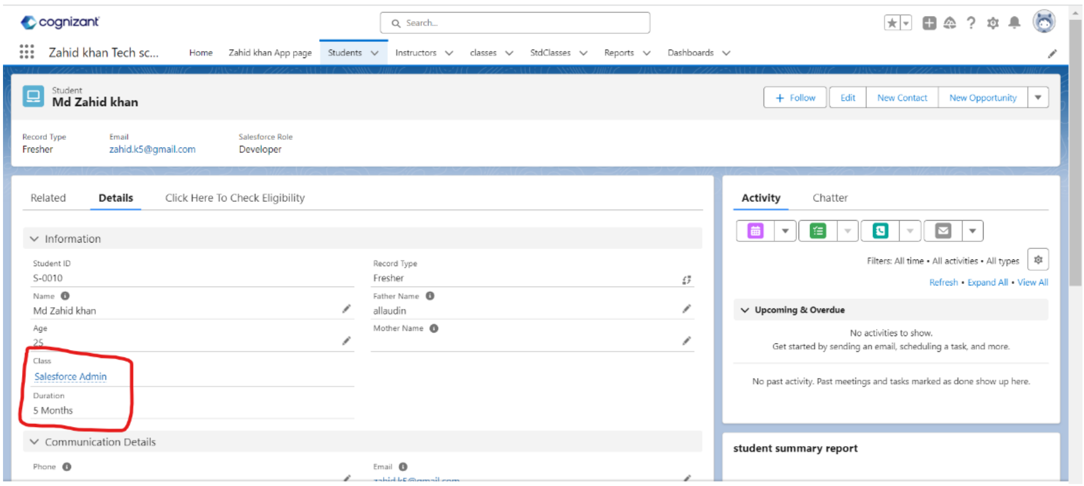
- We are going to make cross object formula between class object (parent) and student object (child). We are going to fetch duration field from class object to the student object.
- So, go to object manager and search for student object after that click on field & relationship.
- After that click on 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.



- 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.



- 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.

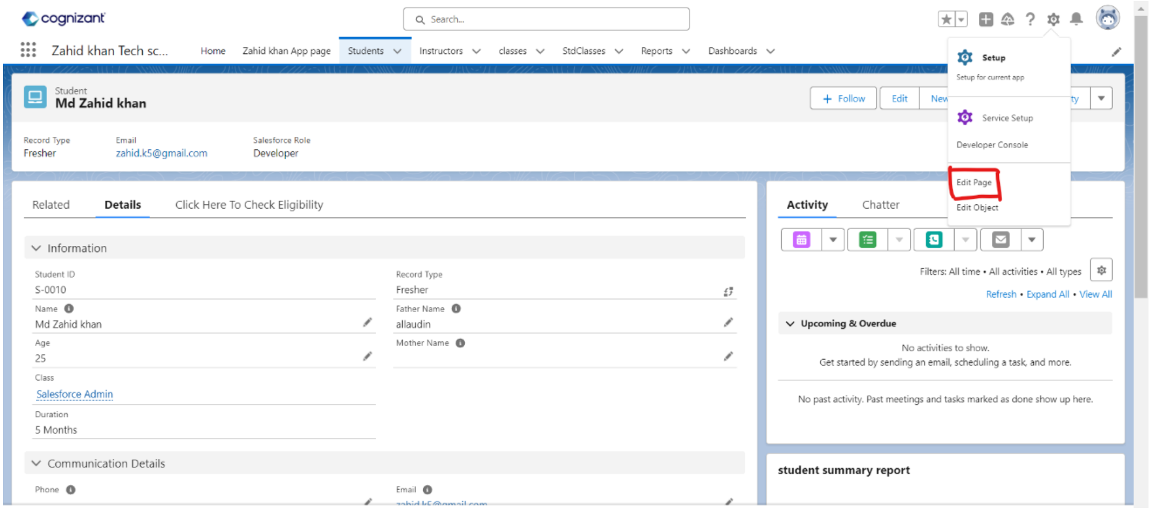


Related list single

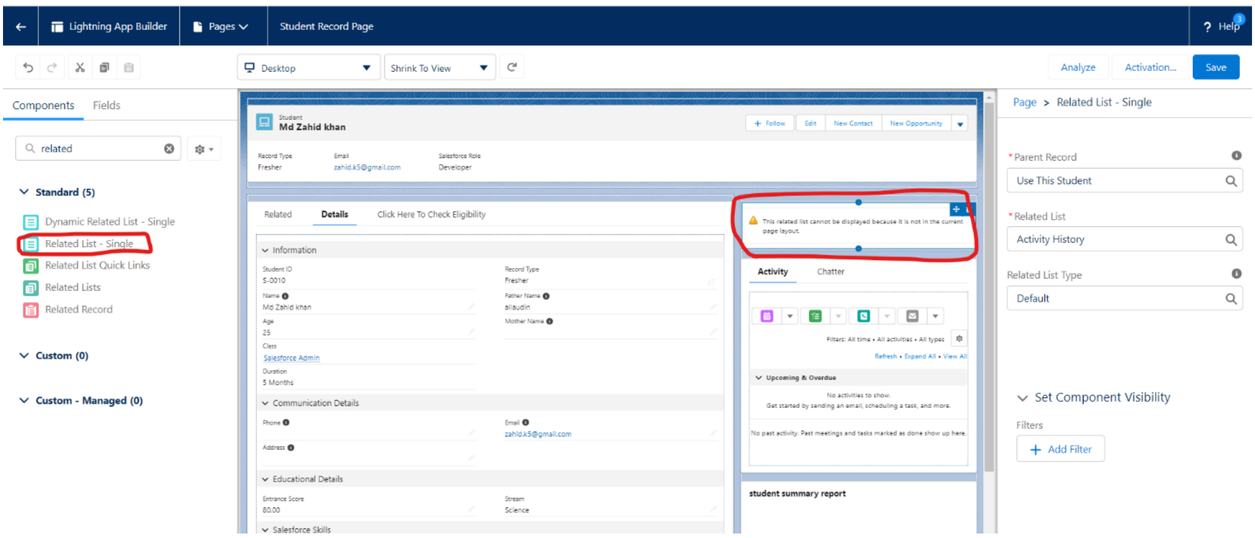
- Related list single is used to show the records of the child object records related to the one parent object records.
- For example, we have a class object which is related to student object. So, using related single list we can show the classmates which is related to one class object records.
- This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

Steps to create related single list:

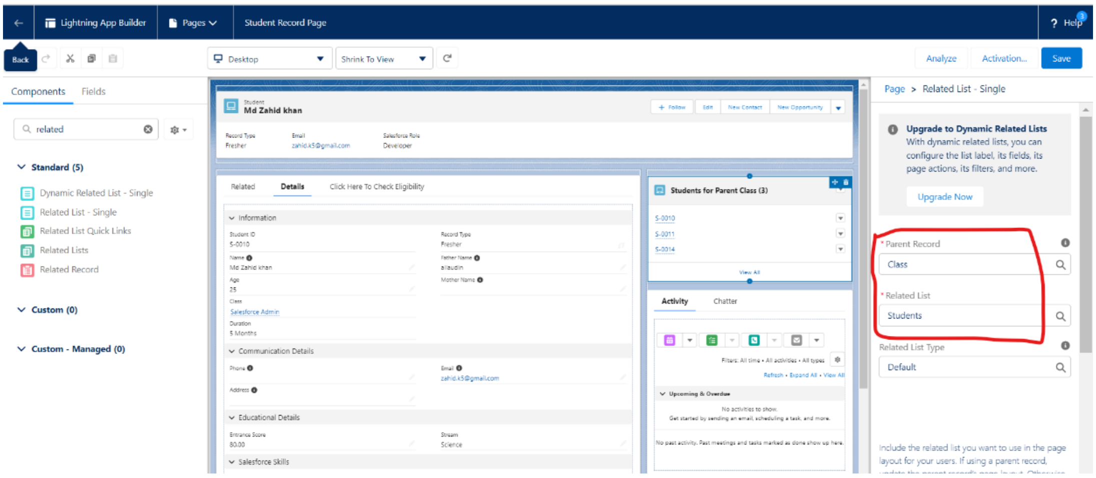
- We have to make related list single in child object because we want to show the records of child object which is related to some particular record in parent object. For example, students object is related to class object with salesforce admin or salesforce developer.
- For create this open any records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



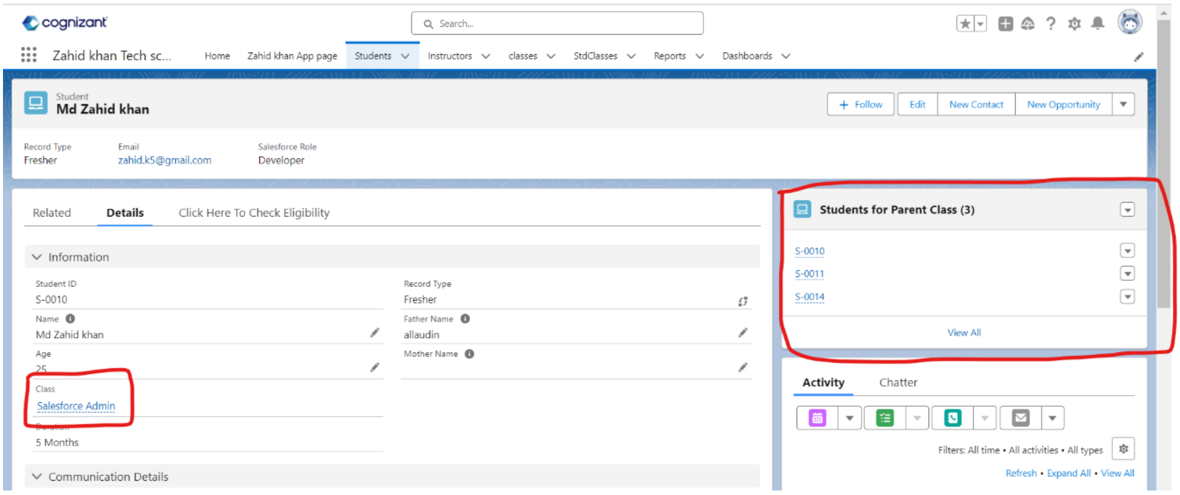
- Now, search for related list single in components and select and drag in before activity tab.



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



- After that save and check the results.



- these all records are related to salesforce admin class.

<u>Salesforce inspector extensions</u>

<u>Steps to install salesforce inspector extensions:</u>

- 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.

<u>App exchange</u>

- 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?

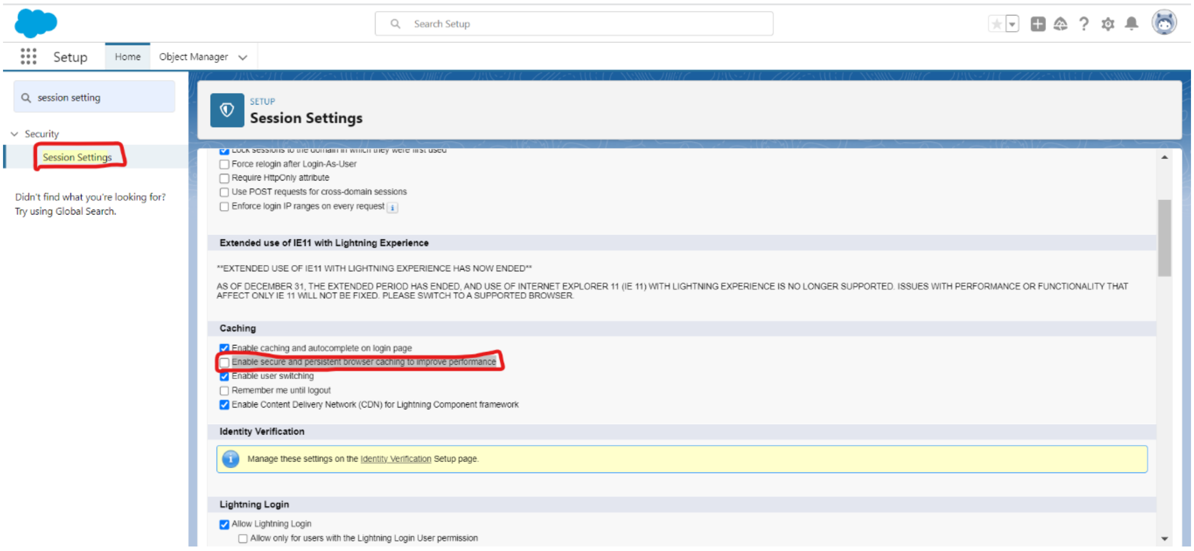
- Primary marketing tool for promoting App or components.
- In listing one can describe solutions, pricing, support, and other details.
- Can also upload videos, white papers, and other contents to help customers understand the app or component.
- AppExchange categorized the listing into various business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

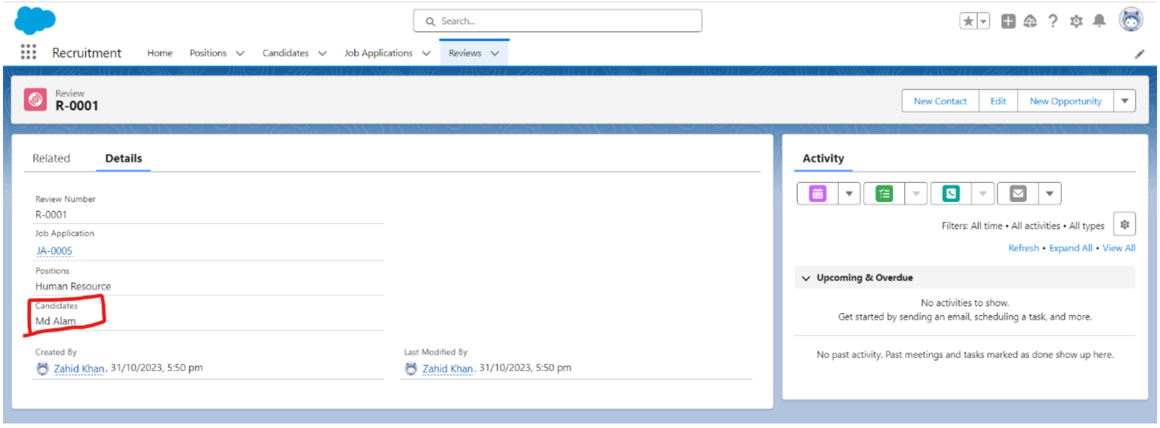
Note: - if field is not visible in the objects but you created it then follow the following steps to make it visible.

- 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.

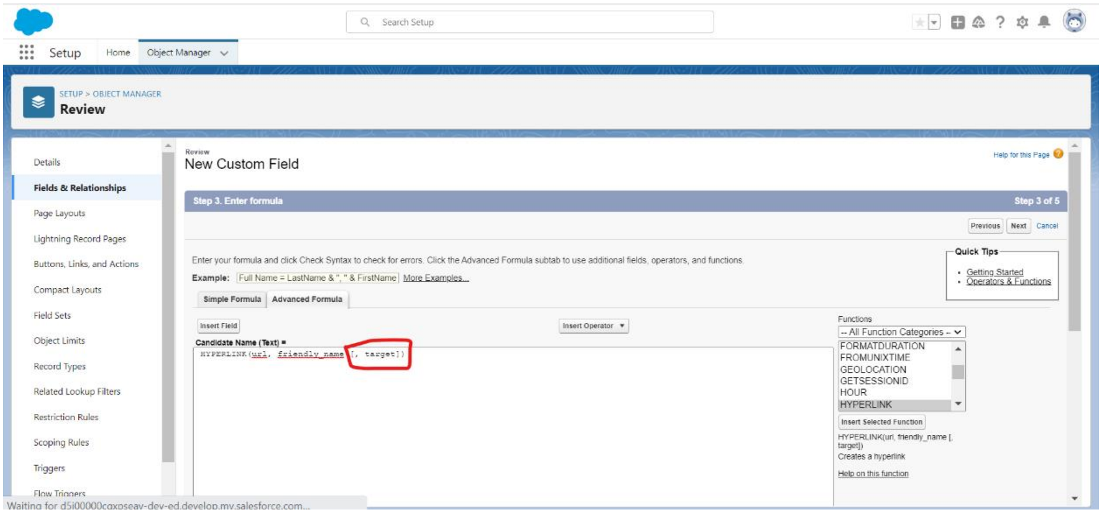


How to make Link of any text in field?

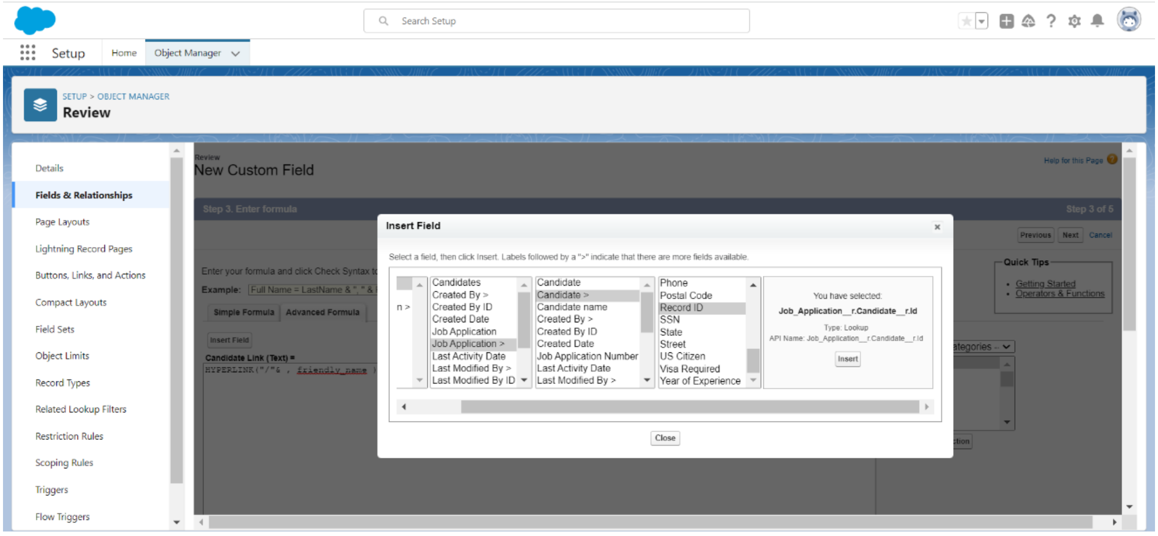
- In most of time we have to convert the text into link so that we can redirect the related records to the object.
- For example, in below image we want to make a link so that when we click on candidate name it will redirect to the records of that candidate.



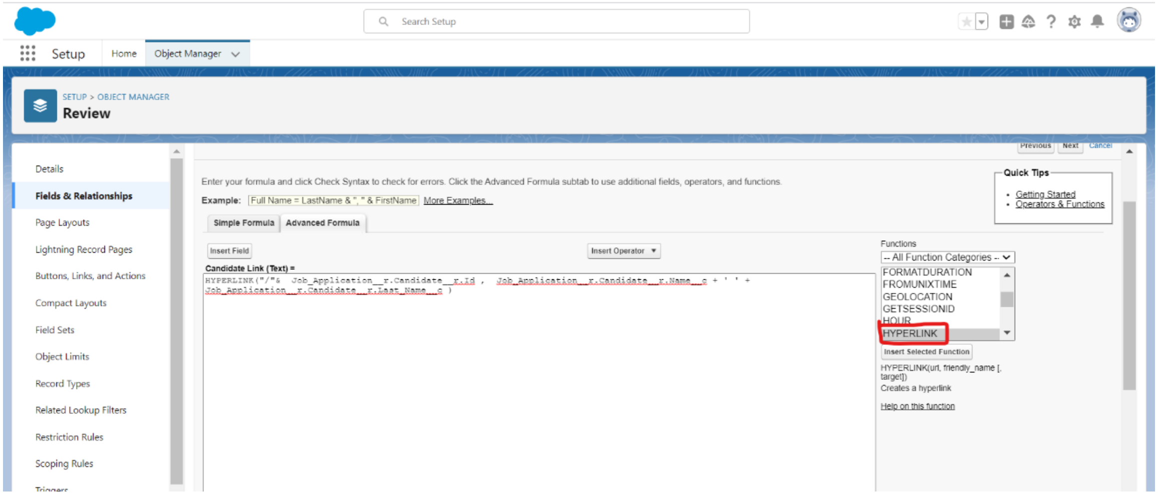
- Go to object manager and search for review object and click on it. After that click on fields & relationships.
- After that click on new.
- Select formula for data types. And click on next.
- After that enter field label and select Text in formula return type.
- Click on next.
- Now select HYPERLINK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



- 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.