Get Started with Salesforce Salesforce

By Technical Amit

Agenda

- ✔ Introduction to Cloud Computing
- ✔ Benefits of Cloud Computing
- ✔ Types of Cloud Services

Introduction to Cloud Computing

- ✔ Cloud computing is the on-demand availability of computers and delivery of IT resources over the Internet with pay-as-you-go pricing.
- ✔ Instead of buying, owning, and maintaining physical data centers and servers, you can access technology services, such as computing power, storage, and databases, on an as-needed basis from a cloud provider like Amazon Web Services (AWS).

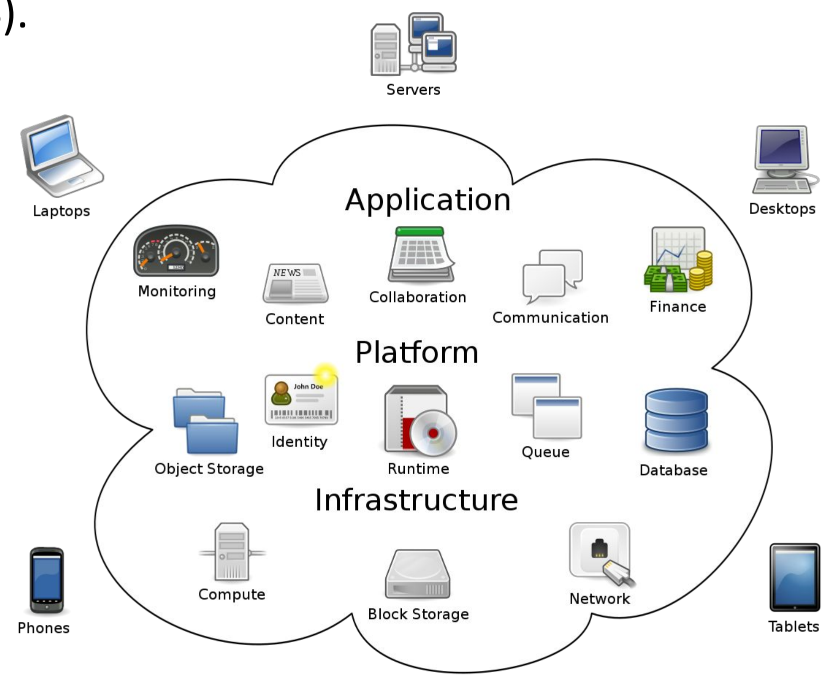

Image source - Wiki

Introduction to Cloud Computing

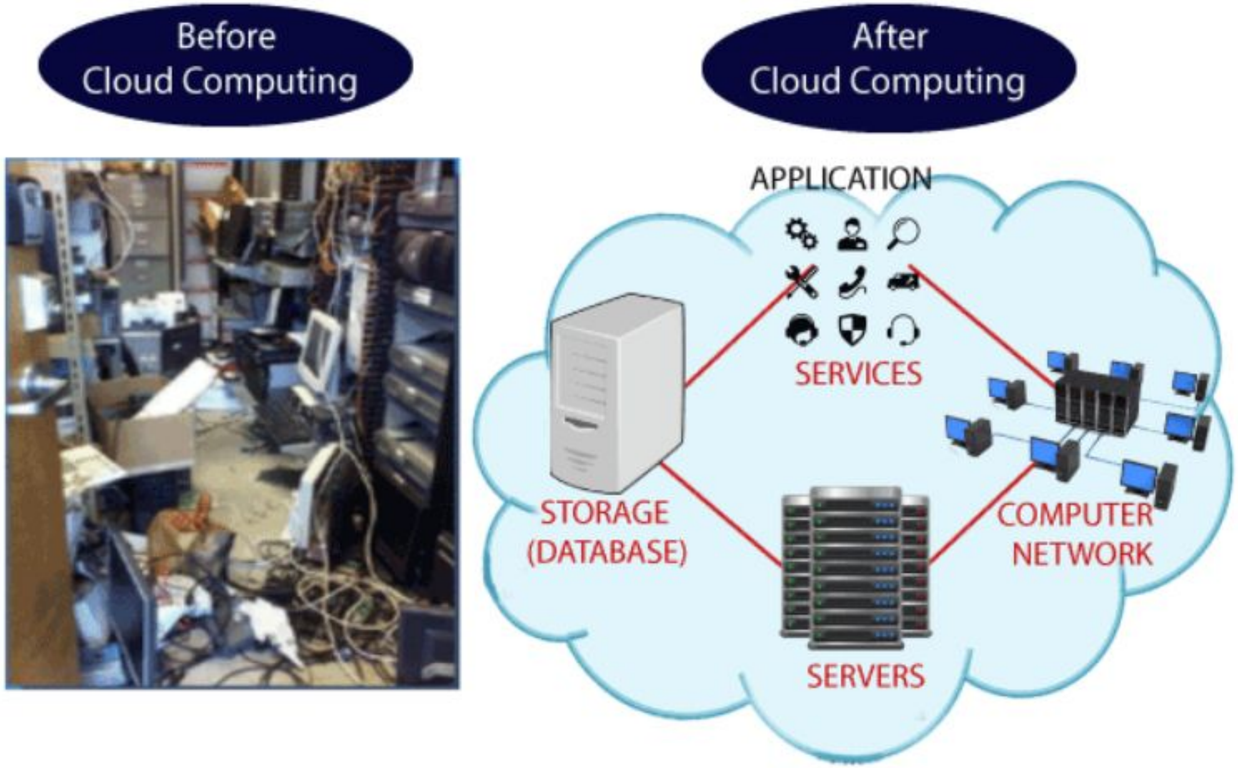

Image source - https://www.javatpoint.com/

Benefits to Cloud Computing

- ✔ **Agility -** The cloud gives you easy access to a broad range of technologies so that you can innovate faster and build nearly anything that you can imagine.
- ✔ **Elasticity -** With cloud computing, you don't have to over-provision resources up front to handle peak levels of business activity in the future. Instead, you provision the number of resources that you need.
- ✔ **Cost savings -** The cloud allows you to trade capital expenses (such as data centers and physical servers) for variable expenses, and only pay for IT as you consume it.
- ✔ **Deploy globally in minutes -** With the cloud, you can expand to new geographic regions and deploy globally in minutes. For example, AWS

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- OS
- Server
- Code
- Security
- Middleware
- Storage
- Networking
- etc

Types of Cloud Services

- ✔ **IAAS** - IaaS means a cloud service provider manages the infrastructure for you—the actual servers, network, virtualization, and data storage—through an internet connection.
- ✔ **PAAS** - PaaS means the hardware and an application-software platform are provided and managed by an outside cloud service provider, but the user handles the apps running on top of the platform and the data the app relies on.
- ✔ **SAAS** - SaaS is a service that delivers a software application—which the cloud service provider manages—to its users. Typically, SaaS apps are web applications or mobile apps that users can access via a web browser.

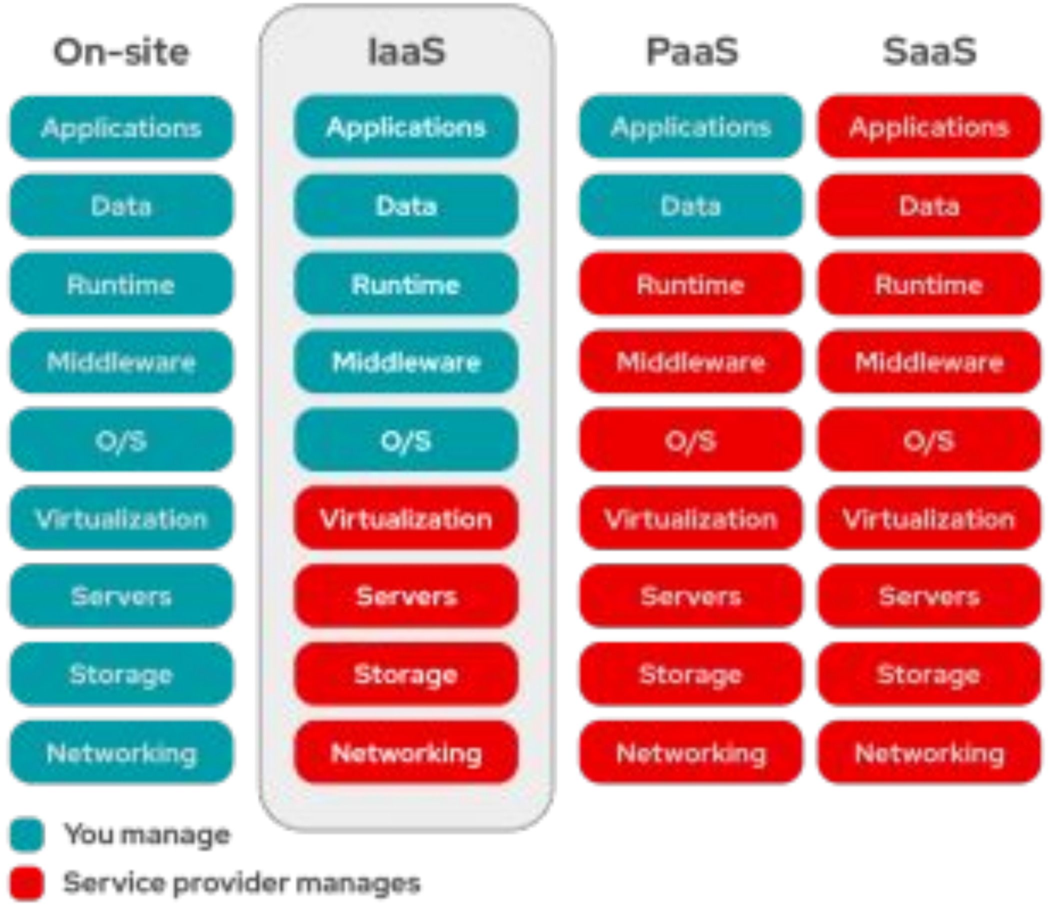


Image source - Redhat

Trailhead.com

Trailhead.com is a one place to learn salesforce Trailhead Is the Fun Way to Learn.

1. You can use trailhead to learn about salesforce technology and earn various swags.
2. You can use trailhead profile as your virtual resume which will help you to get jobs.

Agenda

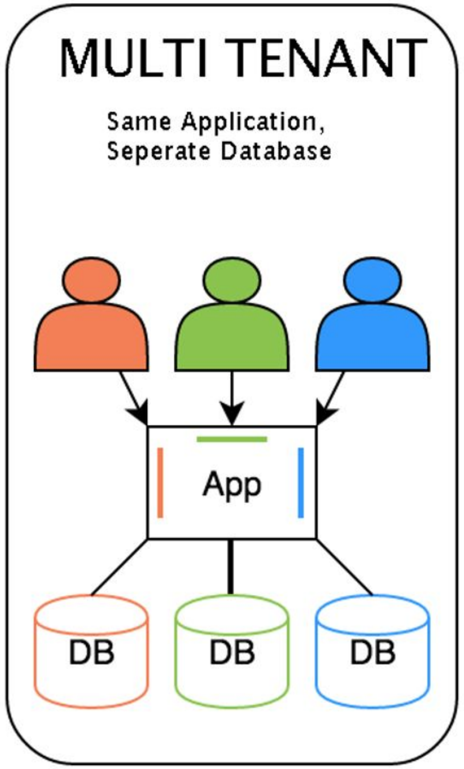
- ❖ Salesforce Basic
- ❖ Signup for free Salesforce Environment

Introduction to Salesforce

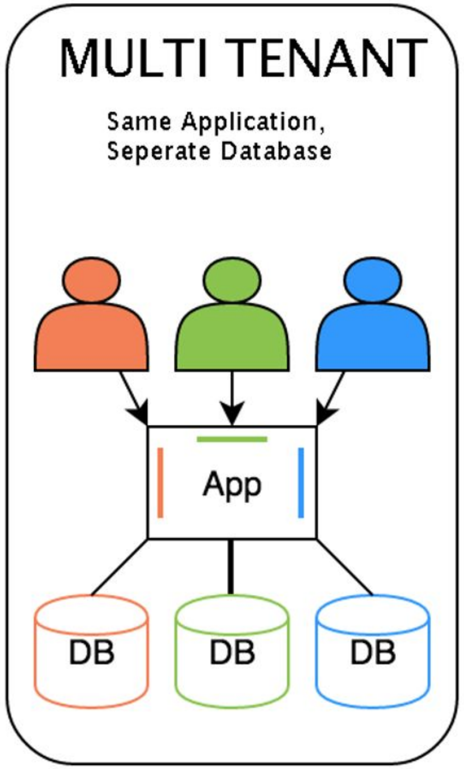
- ✔ It was founded in March 1999 by ex-Oracle employee Marc Benioff, Frank Dominguez, and Parker Harris
- ✔ Salesforce is a cloud-based Customer Relationship Management (CRM) software for managing customer relationships over internet and integration with other systems.
- ✔ This SaaS tool helps to create custom solutions for marketing, sales, services and ecommerce as per business requirements
- ✔ Salesforce provides the various channels for your business to engage with your customer like email, message, live support, self service

Introduction to Salesforce

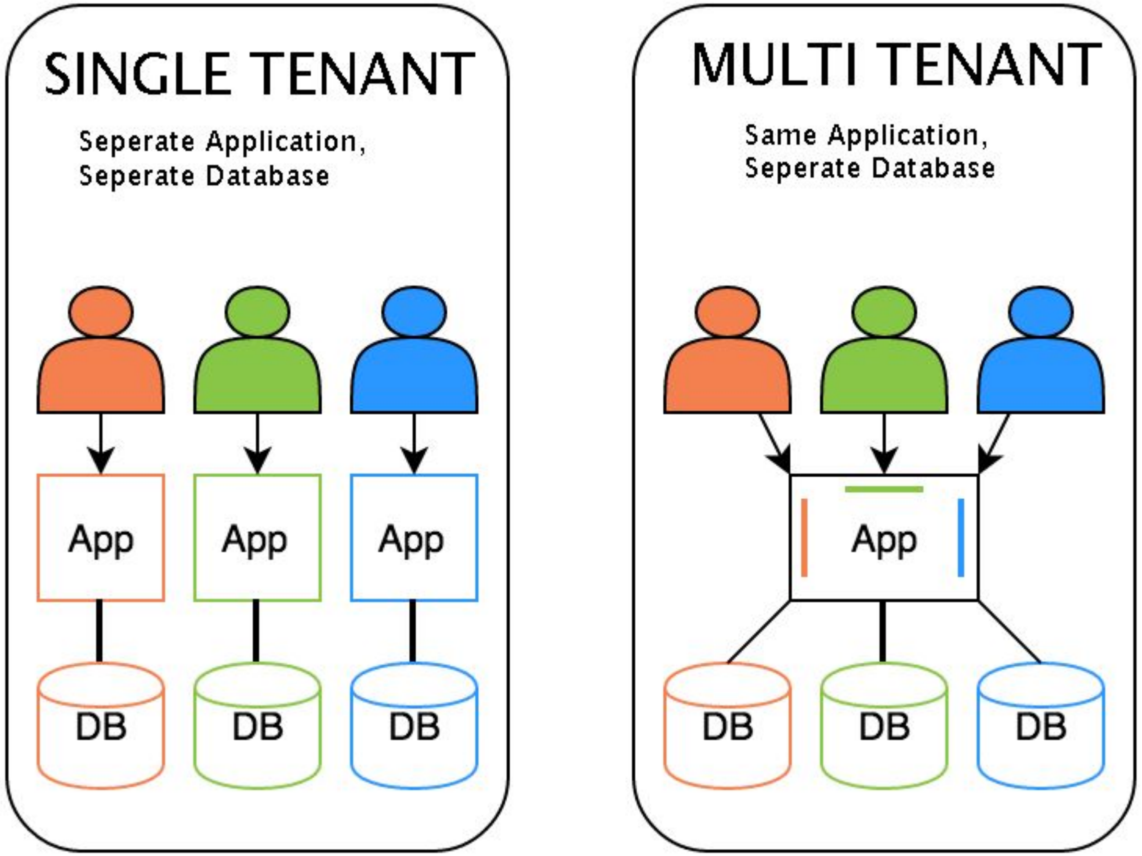
Multi Tenant Architecture



Multi Tenant Architecture



Single vs Multi Tenant



THE SALESFORCE ECONOMY

New research from IDC shows that Salesforce and its ecosystem of partners and customers are having a tremendous global impact. By 2022, IDC predicts that Salesforce's ecosystem will create 3.3 million jobs and $859 billion in new business revenues worldwide.

By the Numbers

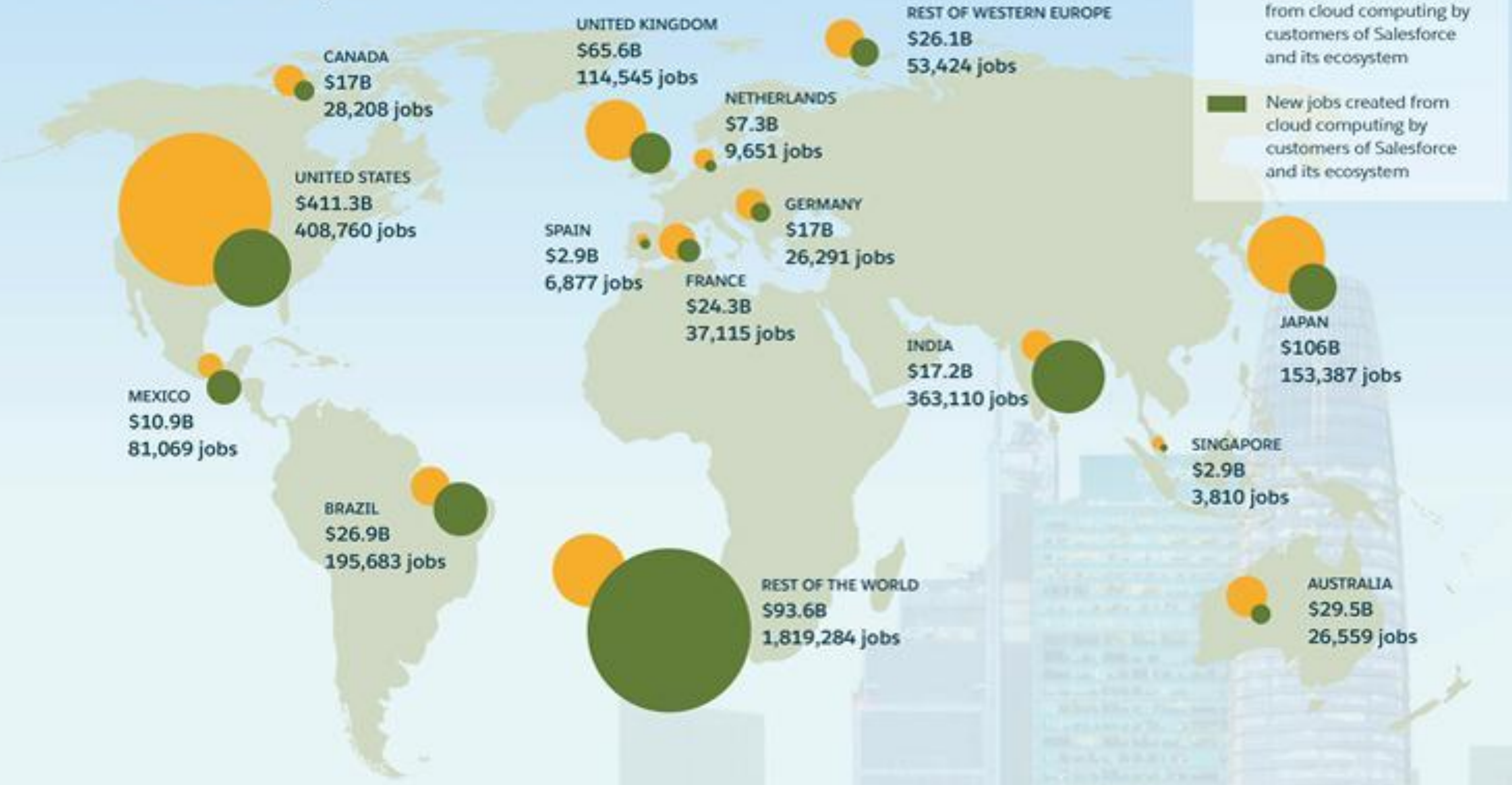
3.3M
new jobs created by 2022

$859B
new business revenues created by 2022

87% of Salesforce customers have installed an AppExchange app

89% of Fortune 100 companies have installed at least one AppExchange app

Economic Impact



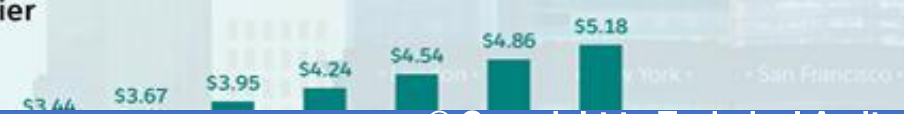
Industry Economic Benefits of the Salesforce Economy

Financial Services
Revenue: $163.7B
Jobs: 584,995

Manufacturing
Revenue: $159B
Jobs: 638,296

Retail
Revenue: $92.6B
Jobs: 401,355

Salesforce Revenue Multiplier



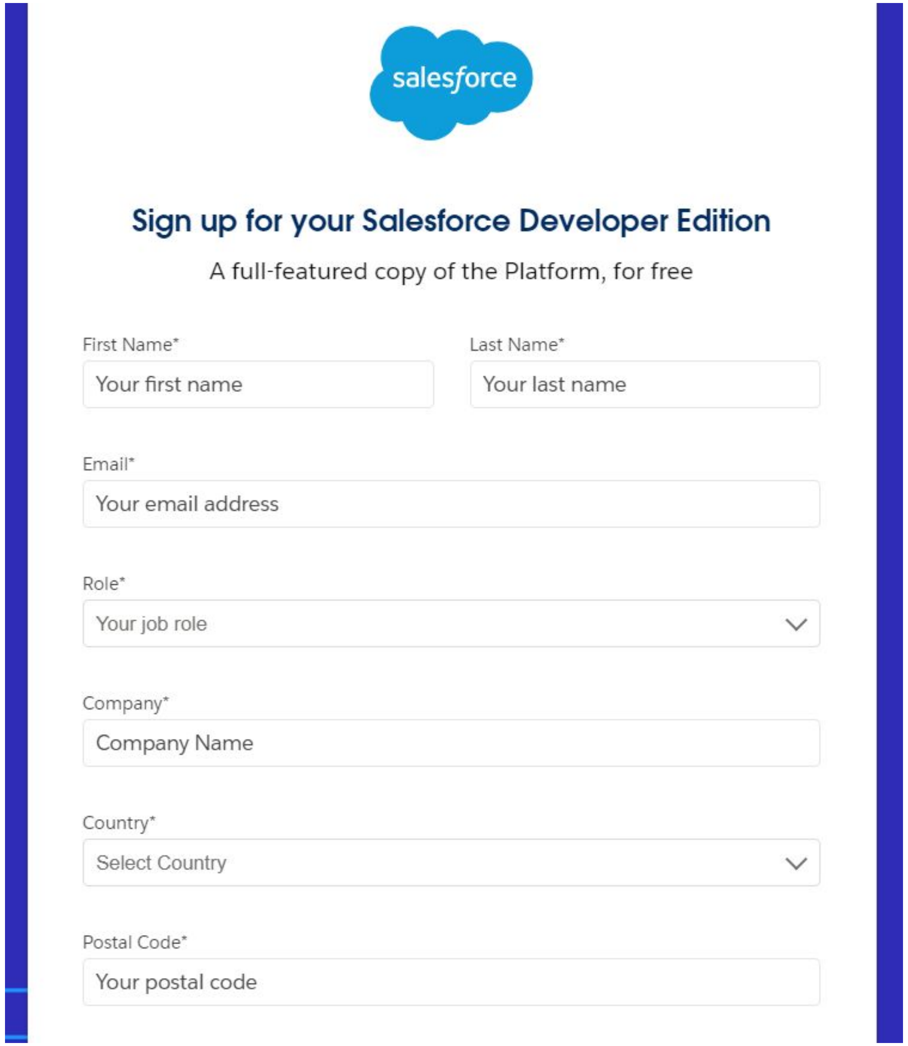

salesforce
Sales
Service
Marketing
Commerce
Apps
Analytics
Integration
Employee Experience
Trailblazers & Reskilling
Industries
Partners
Success

Salesforce Environments

- ✔ **Production Environments –** These are the environments which are used by the real end users.
- ✔ **Development Environments –** These are the environments where you can extend, integrate and develop on Force.com without affecting your production environments.
- ✔ **Test Environments –** They can understand by considering them production or development environments which are specifically used for testing application functionality before deploying to production or releasing to customers.

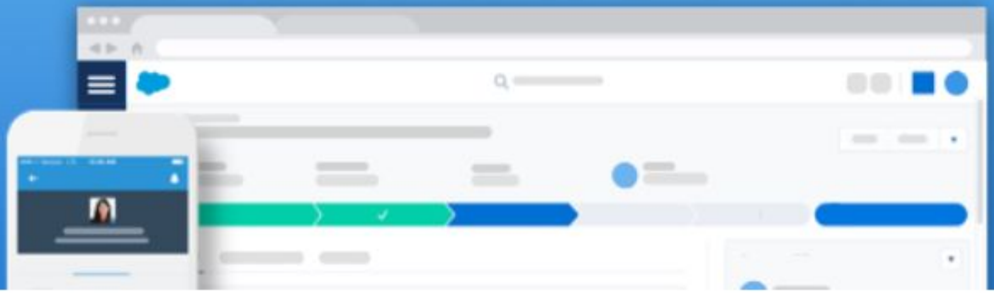
Signup for free Salesforce Environment

- ✔ https://developer.salesforce.com



Signup for free Salesforce Environment

Thanks for signing up with Salesforce!



Click below to verify your account.

Verify Account

To easily log in later, save this URL:
https://d5j000005k5rteas-dev-ed.my.salesforce.com

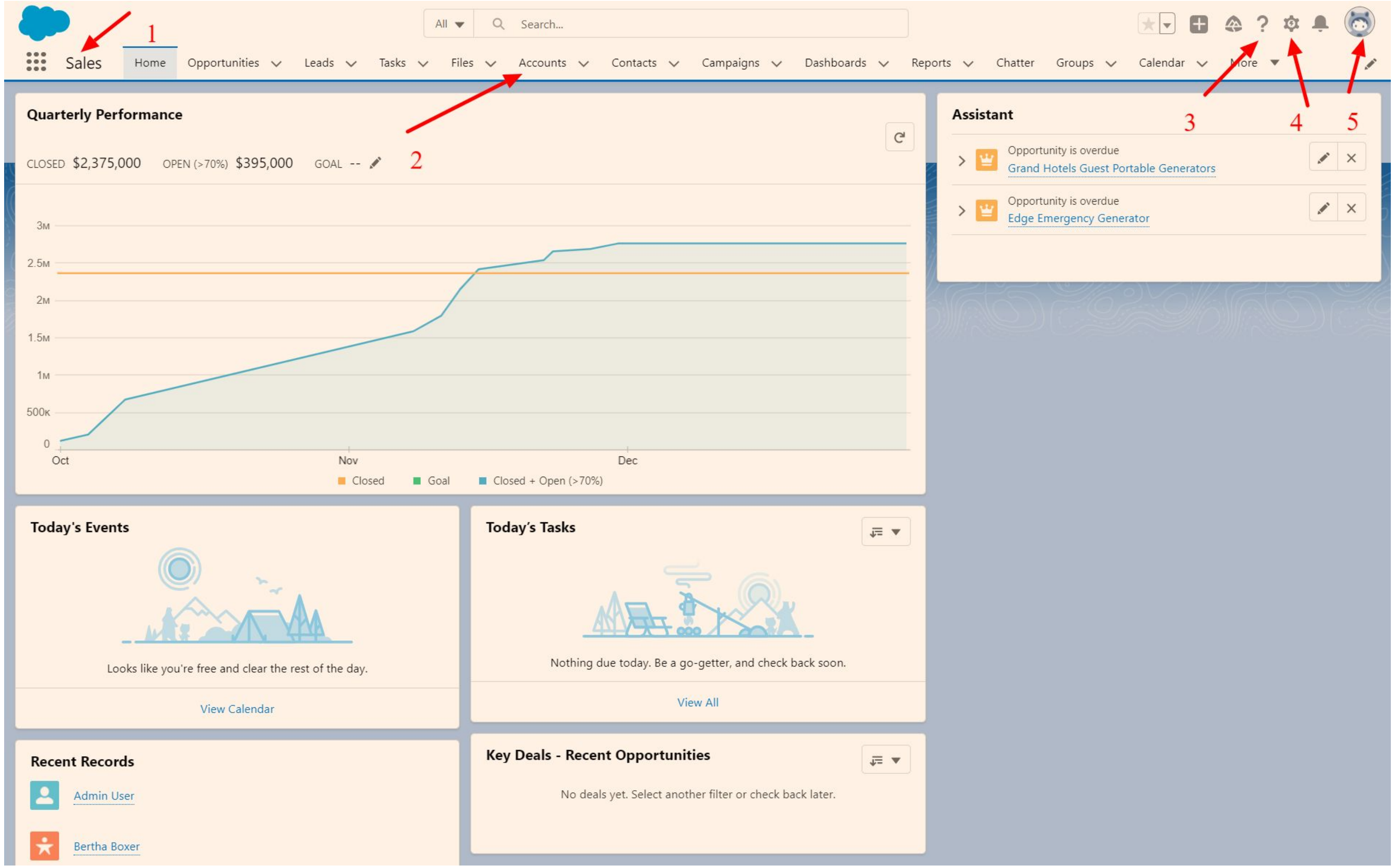
Username:
admintraining@sfdcpanther.com

Again, welcome to Salesforce!

Agenda

- Salesforce Org tour
- Company Information
- Edit User Details

Salesforce Org Tour

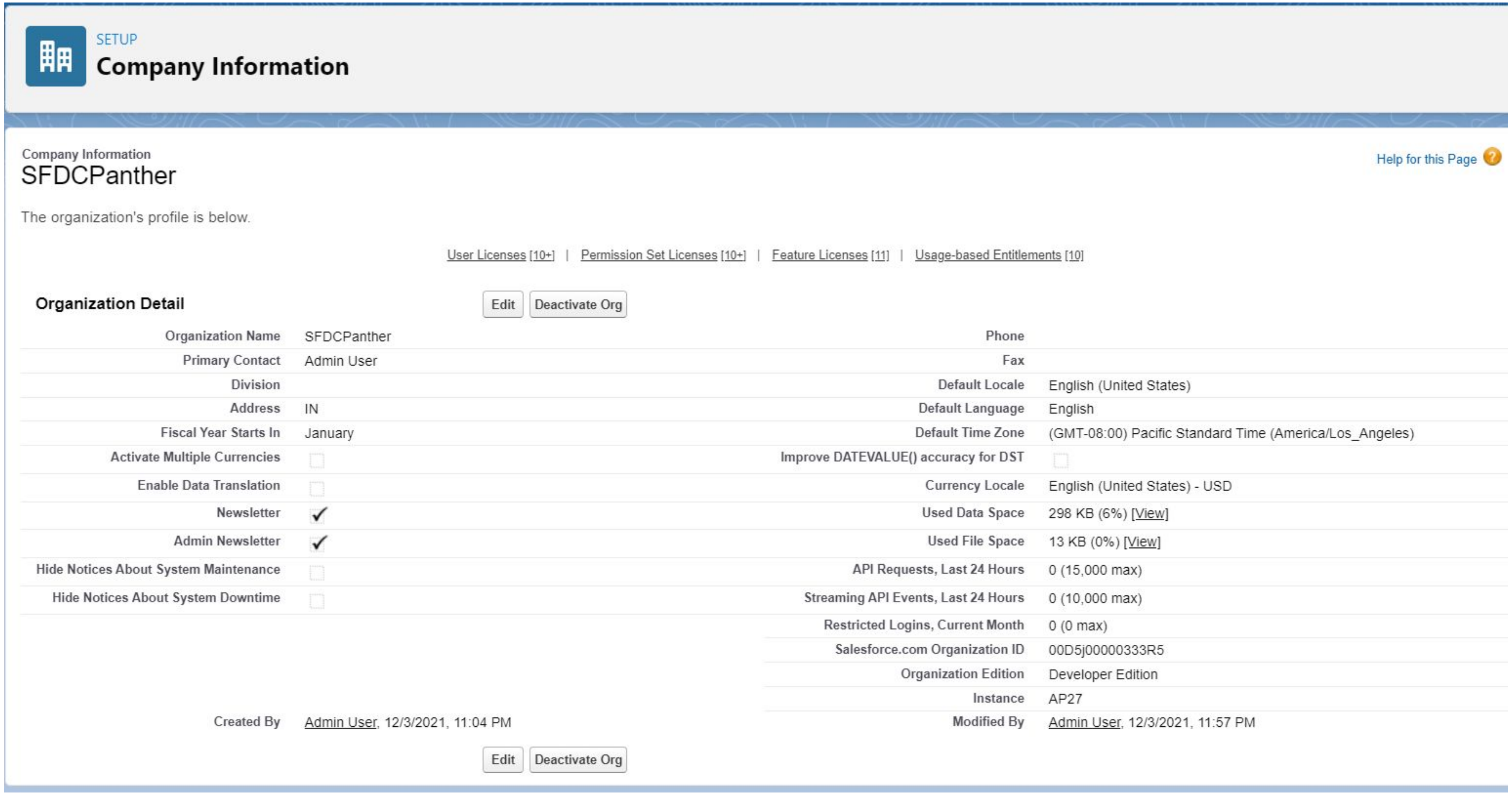


Salesforce Org Tour

1. Salesforce Application
2. Tabs
3. Help
4. Setup
5. User

TECHNICAL AMIT

Company Information



SETUP

Company Information

Company Information

SFDCPanther

Help for this Page

The organization's profile is below.

User Licenses [10+] | Permission Set Licenses [10+] | Feature Licenses [11] | Usage-based Entitlements [10]

Organization Detail Edit | Deactivate Org

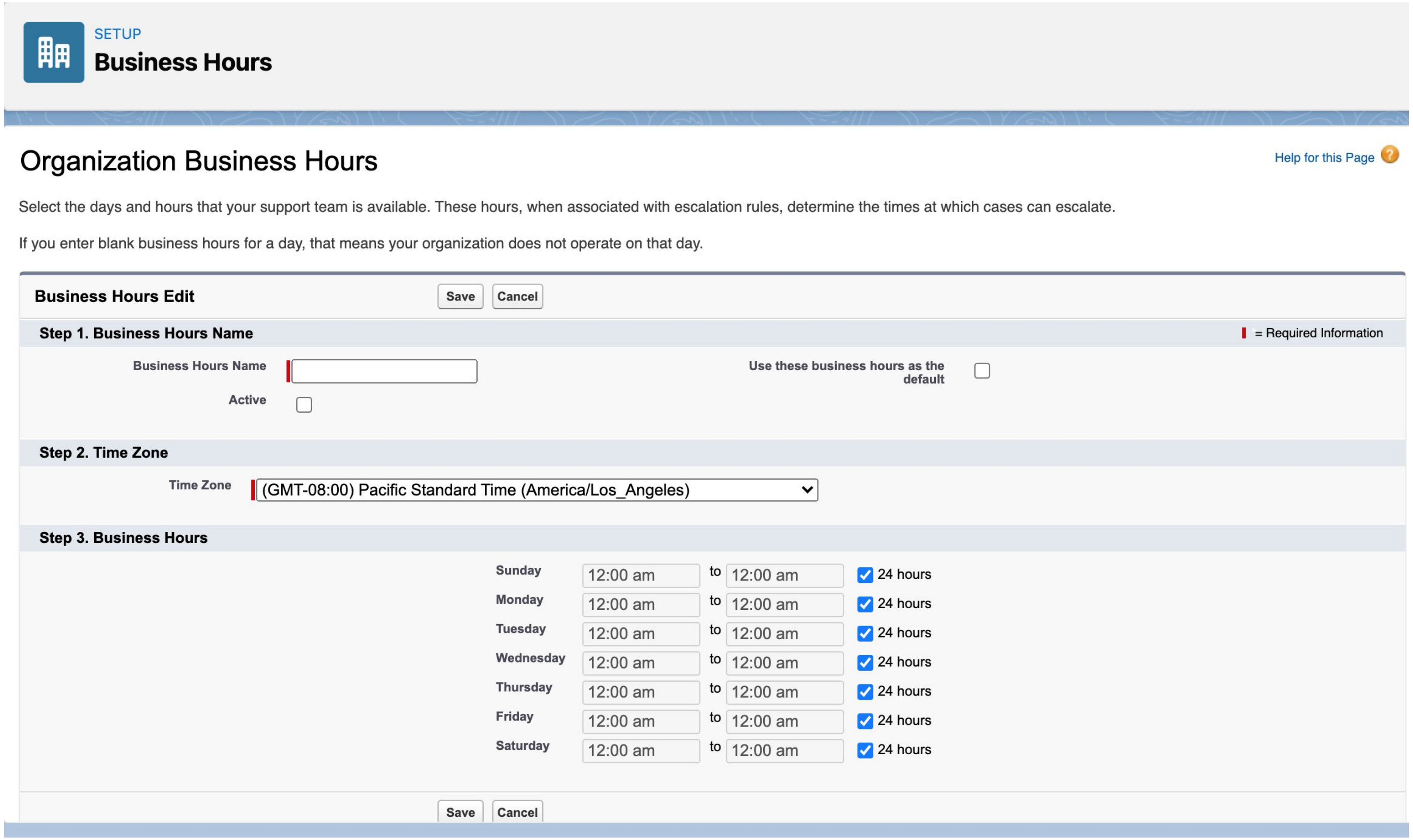
Organization Name	SFDCPanther	Phone	
Primary Contact	Admin User	Fax	
Division		Default Locale	English (United States)
Address	IN	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT-08:00) Pacific Standard Time (America/Los_Angeles)
Activate Multiple Currencies	☐	Improve DATEVALUE() accuracy for DST	☐
Enable Data Translation	☐	Currency Locale	English (United States) - USD
Newsletter	✓	Used Data Space	298 KB (6%) [View]
Admin Newsletter	✓	Used File Space	13 KB (0%) [View]
Hide Notices About System Maintenance	☐	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Downtime	☐	Streaming API Events, Last 24 Hours	0 (10,000 max)
		Restricted Logins, Current Month	0 (0 max)
		Salesforce.com Organization ID	00D5j00000333R5
		Organization Edition	Developer Edition
		Instance	AP27
Created By	Admin User, 12/3/2021, 11:04 PM	Modified By	Admin User, 12/3/2021, 11:57 PM

Edit | Deactivate Org

Business Hours in Salesforce

1. Business hours are the working hours for any business that indicates on what hours a business works. For Example, 09:00 AM to 05:00 PM Monday to Friday
2. Business hours plays an important role while serving the customers (working on cases/tickets) such as escalations

Business Hours in Salesforce



Agenda

- ❖ Application in Salesforce
- ❖ Tabs in Salesforce

Application

1. An app is a collection of items that work together to serve a particular function. Salesforce apps come in two flavors: Classic and Lightning. Classic apps are created and managed in Salesforce Classic.
2. Lightning apps are created and managed in Lightning Experience. You can customize both types of app to match the way your users work.

Types of Application in Salesforce

1. Standard Application
2. Custom Application
3. Console Application

Tabs

Tabs let you display Salesforce object data or other web content in Salesforce.

When you add a custom or standard tab to an app in Salesforce Classic, it appears as a tab.

When you add a custom tab to an app in Lightning Experience, it appears as an item in the app's navigation bar and in the App Launcher.

Types of Tab in Salesforce

1. Standard Tab
2. Custom Tab
3. Web Tab
4. VF Tab
5. Lightning Tab
6. App builder Tab

Exercise

Create a Lightning Application “Education” and add the following standard tabs in the application

1. Home
2. Account
3. Contact

Add any logo if you want

Assignment

Create a Lightning Application **"Expense Tracker"** and add the following standard tabs in the application

1. Home
2. Account
3. Contact

Add any logo if you want

Objects

An Object is a real world entity.

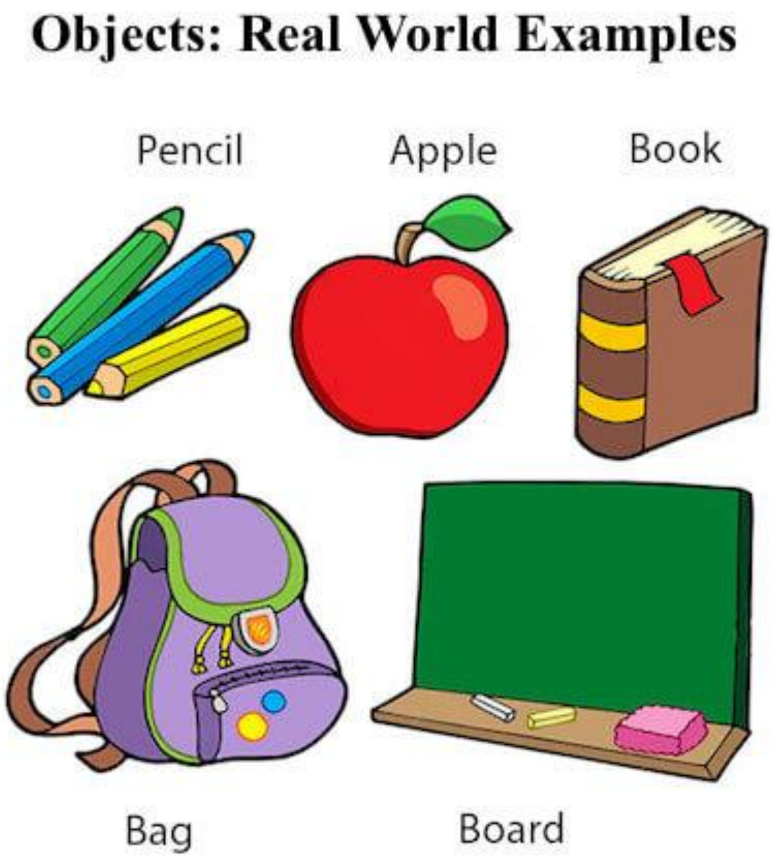
Any object which is real world entity is an object that has **state and behaviour** is known as an object e.g., chair, bike, marker, pen, table, car, etc.

An object has two characteristics:

- **State:** represents the data (value) of an object.
- **Behaviour:** represents the behaviour (functionality) of an object such as deposit, withdraw, etc.

Objects

Any object which is real world entity is an object that has **state and behaviour** is known as an object e.g., chair, bike, marker, pen, table, car, etc.

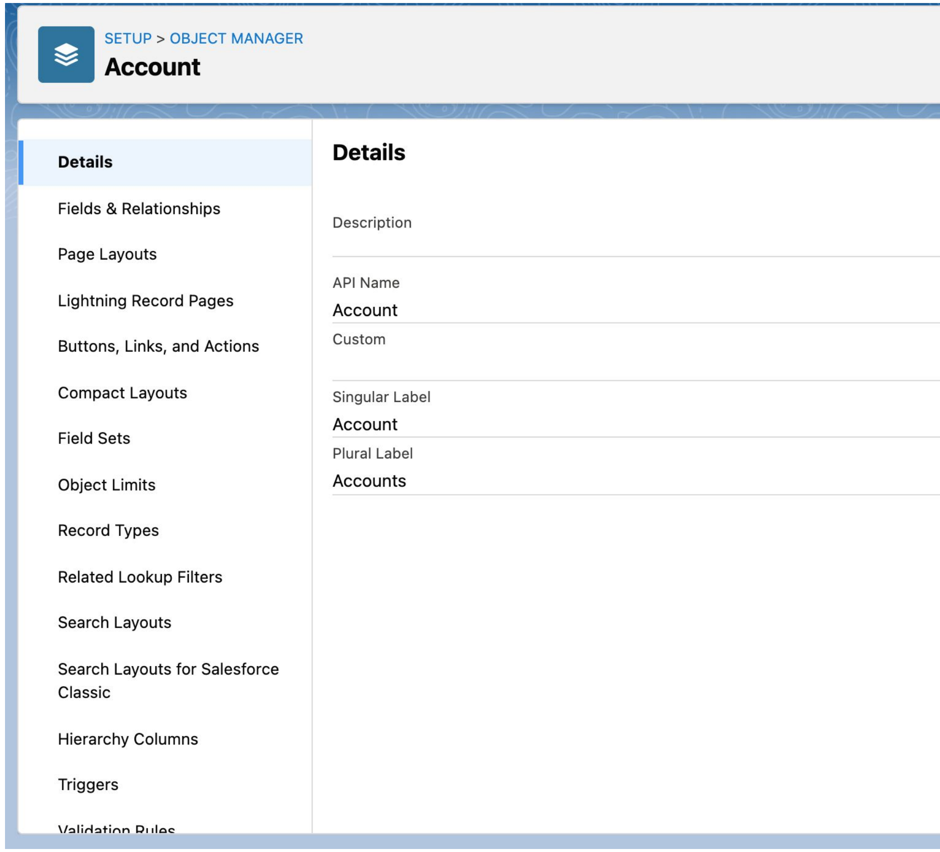


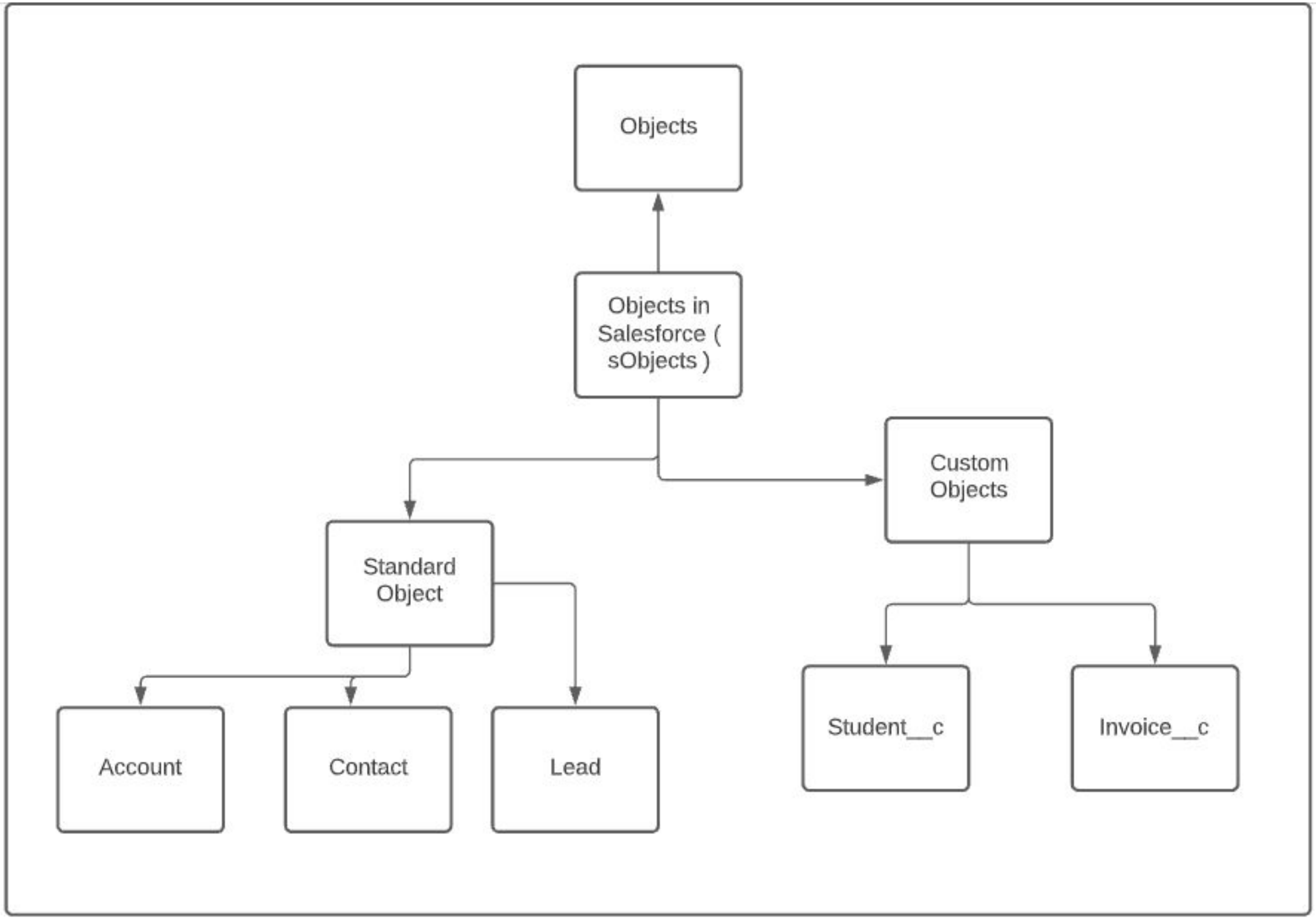
Objects in Salesforce

1. Objects in Salesforce are equal to Tables in Database
2. Objects in Salesforce are equals to Sheets in Excel Document
3. Fields under any object is equal to columns in Excel and Columns in Tables

Type of Objects in Salesforce – There are 2 types of objects in Salesforce

- Standard objects are those objects which are already available in Salesforce.
- Custom Objects are those Objects which we create in the Salesforce Org.
- The Identifier for the Custom Object is that it's API Name always ends with __c




Objects
Objects in Salesforce (sObjects)
Standard Object
Custom Objects
Account
Contact
Lead
Student__c
Invoice__c

Fields

	A	B	C	D	E	F
1	Customer Id	First Name	Last Name	Email	Gender	
2	1	Ambrosi	Dumbare	adumbare0@edublogs.org	Female	
3	2	Langston	Normabell	lnormabell1@mediafire.com	Female	
4	3	Legra	Handyside	lhandyside2@chronoengine.com	Male	
5	4	Dagny	Bertelmot	dbertelmot3@dell.com	Male	
6	5	Angelico	Arnely	aarnely4@webmd.com	Female	
7	6	Dianemarie	Ollis	dollis5@fema.gov	Female	
8	7	Clair	Killwick	ckillwick6@nba.com	Female	
9	8	Zared	Gauld	zgauld7@desdev.cn	Female	
10	9	Ora	Rickis	orickis8@cam.ac.uk	Male	
11	10	Krystal	Schuricht	kschuricht9@washingtonpost.com	Male	
12	11	Yorke	Crolly	ycrollya@hibu.com	Female	
13	12	Sosanna	Davidi	sdavidib@hostgator.com	Female	
14	13	Torr	Blackham	tblackhamc@washingtonpost.com	Female	
15	14	Alfred	Gatrell	agatrelld@nps.gov	Female	
16	15	Ula	Stretton	ustrettone@yale.edu	Agender	
17	16	Renell	Climer	rclimerf@technorati.com	Agender	
18	17	Sylvia	Hopewell	shopewellg@woothemes.com	Male	
19	18	Marji	Chimienti	mchimientih@unc.edu	Female	
20	19	Van	Boynton	vboyntoni@exblog.jp	Female	
21	20	Cris	Allcoat	callcoatj@phpbb.com	Male	
22	21	Nikki	Penburton	npenburtonk@home.pl	Female	
23	22	Fionnula	Dummigan	fdummiganl@dedecms.com	Female	
24	23	Wilhelm	Vannacci	wvannaccim@foxnews.com	Female	
25	24	Michelina	Matushevitz	mmatushevitzn@pen.io	Male	
26	25	Carissa	Eaddy	ceaddyo@irs.gov	Female	
27	26	Maurita	Monksfield	mmonksfieldp@unc.edu	Female	

Customers | Expenses | Invoices | Orders | +

Objects

Exercise

1. Create a Custom Object named **Student** with following fields
   - Name (Standard Field)
2. Also, Create the Custom Tab for the Student and add to Education Application

Object Description – This object will be used to track the detail of all the students who are studying or have left the college.

Assignment

1. Create a Custom Object named “**Company**” with following fields
   - Name (Standard Field)
2. Also, Create the Custom Tab for the Company Object and add to **Expense Tracker** Application

Note :- Provide the below description for the object

Object Description – This object will be used to track the company details where company is spending expenses or reimbursing the amount for their employees.

Agenda

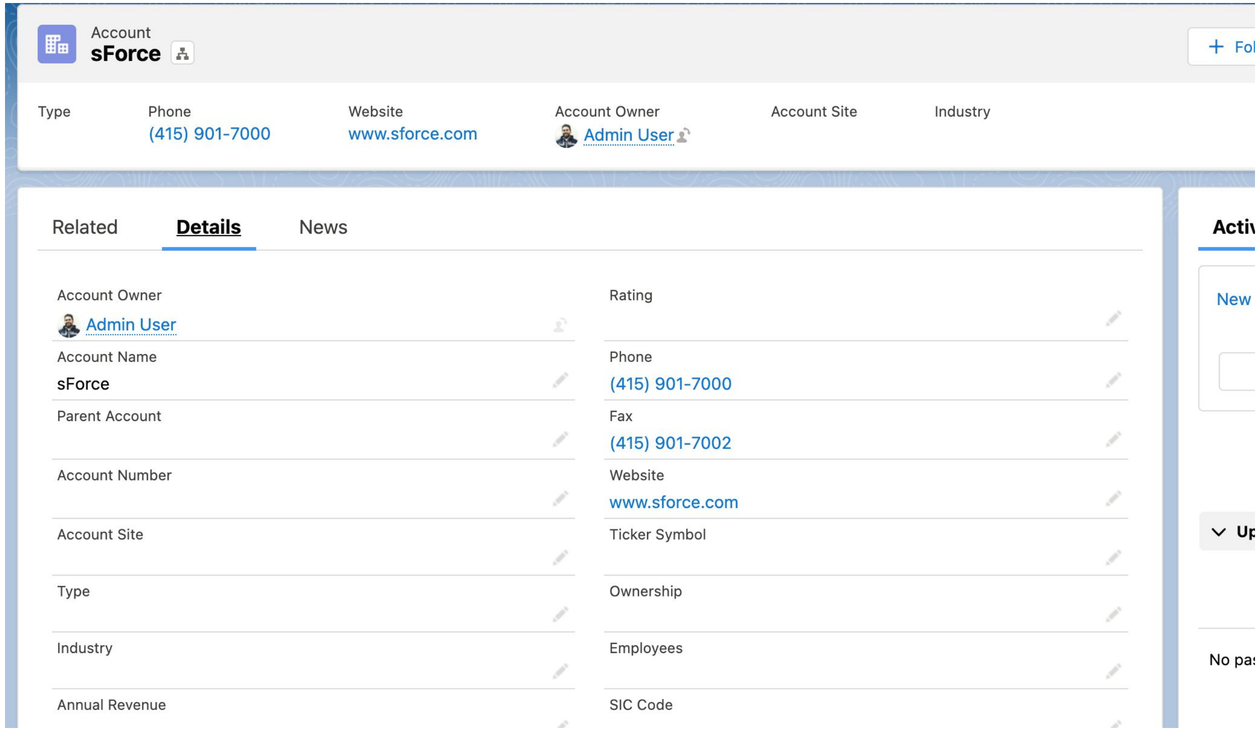
Introduction to some important and valuable objects in Salesforce

1. Account
2. Contacts
3. Lead
4. Opportunity
5. Case

Account

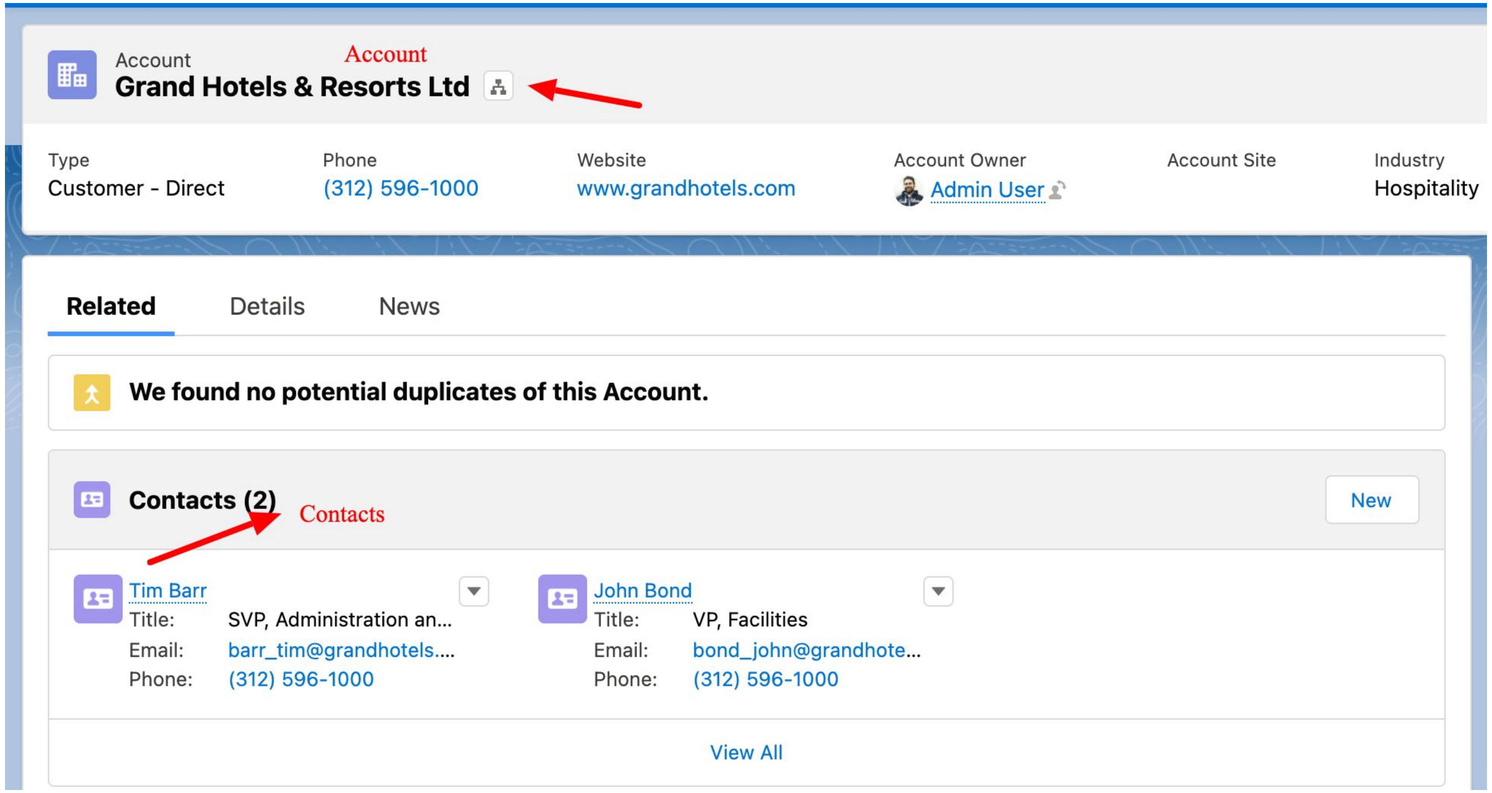
1. Accounts in Salesforce represents **a company or an individual in real life** with whom we are doing the business.
2. Account can be our company partners or business partners or an individual customer

3. Google.com
4. Amazon.com
5. Salesforce.com
6. etc



Contact

Contact in Salesforce represents **the individual people associated with business account in your organization**



Lead

1. Leads in Salesforce are the people who are interested in doing the business with us or they want to purchase our product or services.
2. When we convert the leads then they become account, contact and Opportunity

Leads
All Open Leads

New | Import | Add

15 items • Sorted by Name • Filtered by All leads - Lead Status • Updated a few seconds ago

Search this

	Name	Company	Stat...	Email	Lead Status
1	Bertha Boxer	Farmers Coop. of Florida	FL	bertha@fcof.net	Working - Contacted
2	Betty Bair	American Banking Corp.	PA	bblair@abankingco.com	Working - Contacted
3	Brenda Mcclure	Cadinal Inc.	IL	brenda@cardinal.net	Working - Contacted
4	David Monaco	Blues Entertainment Corp.		david@blues.com	Working - Contacted
5	Jeff Glimpse	Jackson Controls		jeffg@jackson.com	Open - Not Contacted
6	Kathy Snyder	TNR Corp.	CT	ksynder@tnr.net	Working - Contacted
7	Kristen Akin	Aethna Home Products	VA	kakin@athenahome.com	Working - Contacted
8	Mike Braund	Metropolitan Health Services	MD	likeb@metro.com	Open - Not Contacted
9	Norm May	Greenwich Media	OH	norm_may@greenwich.net	Working - Contacted
10	Patricia Feager	International Shipping Co.	NC	patricia_feager@is.com	Working - Contacted
11	Phyllis Cotton	Abbott Insurance	VA	pcotton@abbottins.net	Open - Not Contacted
12	Sandra Eberhard	Highland Manufacturing Ltd.	CA	sandra_e@highland.net	Working - Contacted
13	Shelly Brownell	Western Telecommunications Corp.	CA	shellyb@westerntelecom.com	Working - Contacted
14	Tom James	Delphi Chemicals	MN	tom.james@delphi.chemicals.com	Working - Contacted
15	Violet Maccleod	Emerson Transport	GA	violetm@emersontransport.com	Working - Contacted

Opportunity

- An opportunity in Salesforce is a Sales of Pending Deals
- On the other word we can also say that Opportunities are deals in progress

Opportunities
All Opportunities

Search this

31 items • Sorted by Opportunity Name • Filtered by All opportunities • Updated a few seconds ago

	Opportunity Name ↑	Account Name	Amount	Close Date
1	Burlington Textiles Weaving Plant Generator	Burlington Textiles Corp of America	₹2,35,000.00	08/11/2021
2	Dickenson Mobile Generators	Dickenson plc	₹15,000.00	15/11/2021
3	Edge Emergency Generator	Edge Communications	₹75,000.00	02/01/2022
4	Edge Emergency Generator	Edge Communications	₹35,000.00	08/01/2022
5	Edge Installation	Edge Communications	₹50,000.00	24/10/2021
6	Edge SLA	Edge Communications	₹60,000.00	19/09/2021
7	Express Logistics Portable Truck Generators	Express Logistics and Transport	₹80,000.00	27/09/2021
8	Express Logistics SLA	Express Logistics and Transport	₹1,20,000.00	28/09/2021
9	Express Logistics Standby Generator	Express Logistics and Transport	₹2,20,000.00	29/09/2021
10	GenePoint Lab Generators	GenePoint	₹60,000.00	27/12/2021
11	GenePoint SLA	GenePoint	₹30,000.00	30/12/2021
12	GenePoint Standby Generator	GenePoint	₹85,000.00	06/11/2021
13	Grand Hotels Emergency Generators	Grand Hotels & Resorts Ltd	₹2,10,000.00	14/12/2021
14	Grand Hotels Generator Installations	Grand Hotels & Resorts Ltd	₹3,50,000.00	16/12/2021
15	Grand Hotels Guest Portable Generators	Grand Hotels & Resorts Ltd	₹2,50,000.00	02/01/2022

Cases

- A case is **a customer's question, feedback, or issue**.
- Support agents can review cases to see how they can deliver better service in Salesforce are your customer request

Cases
All Closed Cases

23 items • Sorted by Case Number • Filtered by All cases - Closed • Updated a few seconds ago

Search this

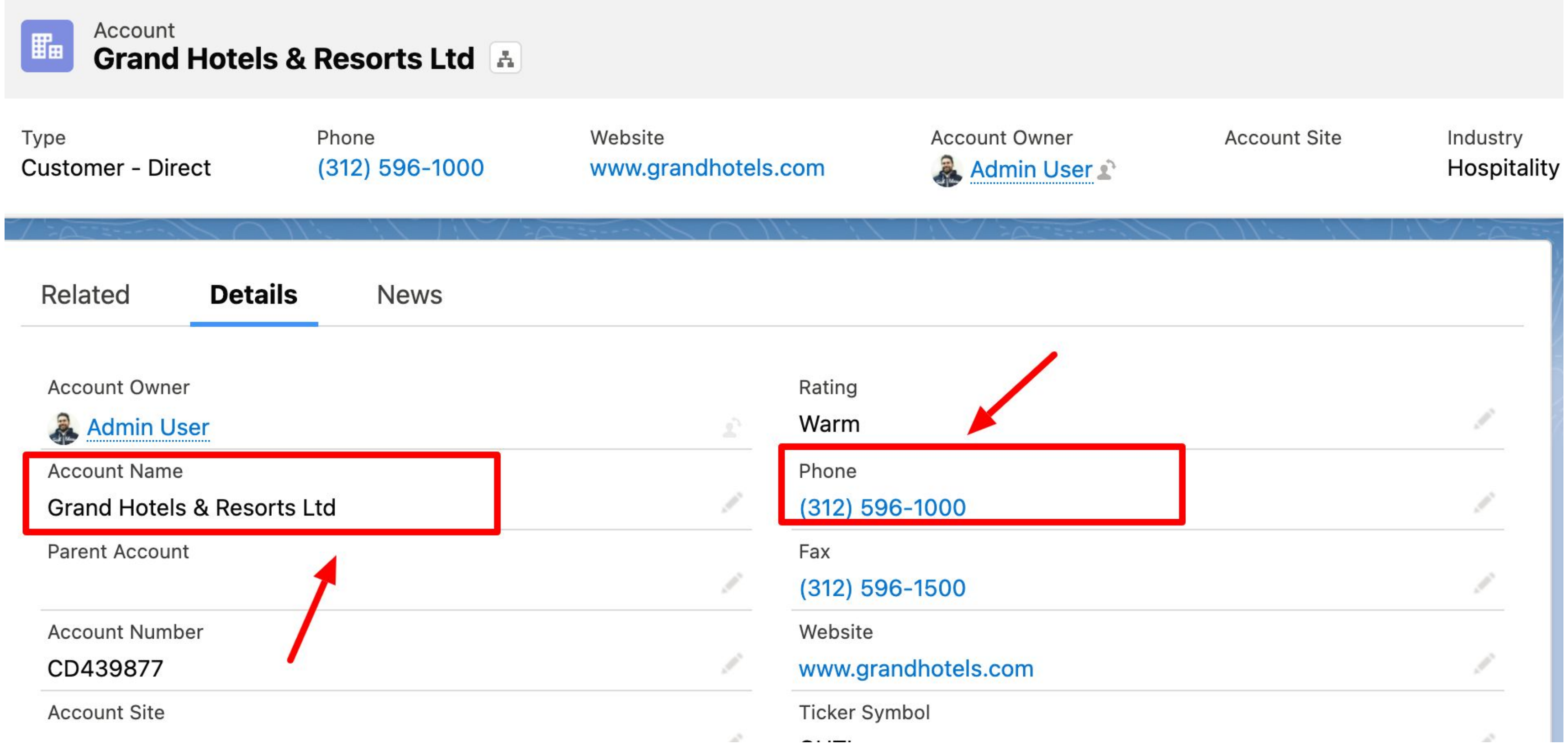
	Case Number	Contact Name	Subject	Status	Priority
1	00001000	Rose Gonzalez	Starting generator after electrical failure	Closed	High
2	00001001	Avi Green	Performance inadequate for second consecutive week	Closed	High
3	00001003	Babara Levy	Easy installation process	Closed	Low
4	00001004	Babara Levy	Maintenance guidelines for generator unclear	Closed	Medium
5	00001005	Josh Davis	Electrical circuit malfunctioning	Closed	Medium
6	00001006	Edna Frank	Generator assembly instructions unclear	Closed	Low
7	00001007	Tim Barr	Structural breakdown of rotor assembly	Closed	Medium
8	00001008	Tim Barr	Customer service for portable generators needs beefing up	Closed	Low
9	00001009	Ashley James	Mechanical maintenance guidelines for generator mislead...	Closed	Medium
10	00001010	Tom Ripley	Maintenance guidelines for generator unclear	Closed	Low
11	00001011	Liz D'Cruz	Electronic panel fitting loose	Closed	Medium
12	00001012	Jane Grey	Repeated motor breakdown while shutting off	Closed	Medium
13	00001013	John Bond	Starting up generator consumes excessive power	Closed	Medium
14	00001014	John Bond	Delay in installation; spare parts unavailable	Closed	High
15	00001015	Liz D'Cruz	Frequent mechanical breakdown	Closed	Medium

Agenda

1. Introduction to fields in Salesforce
2. Different Field Data Types
3. Create Few Fields under Student Object

What is a field

Fields in Salesforce represents what the columns represent in relational databases. It can store data values which are required for a particular object in a record.



What is a field

	A	B	C	D	E	F
1	Customer Id	First Name	Last Name	Email	Gender	
2	1	Ambrosi	Dumbare	adumbare0@edublogs.org	Female	
3	2	Langston	Normabell	lnormabell1@mediafire.com	Female	
4	3	Legra	Handyside	lhandyside2@chronoengine.com	Male	
5	4	Dagny	Bertelmot	dbertelmot3@dell.com	Male	
6	5	Angelico	Arnely	aarnely4@webmd.com	Female	
7	6	Dianemarie	Ollis	dollis5@fema.gov	Female	
8	7	Clair	Killwick	ckillwick6@nba.com	Female	
9	8	Zared	Gauld	zgauld7@desdev.cn	Female	
10	9	Ora	Rickis	orickis8@cam.ac.uk	Male	
11	10	Krystal	Schuricht	kschuricht9@washingtonpost.com	Male	
12	11	Yorke	Crolly	ycrollya@hibu.com	Female	
13	12	Sosanna	Davidi	sdavidib@hostgator.com	Female	
14	13	Torr	Blackham	tblackhamc@washingtonpost.com	Female	
15	14	Alfred	Gatrell	agatrelld@nps.gov	Female	
16	15	Ula	Stretton	ustrettone@yale.edu	Agender	
17	16	Renell	Climer	rclimerf@technorati.com	Agender	
18	17	Sylvia	Hopewell	shopewellg@woothemes.com	Male	
19	18	Marji	Chimienti	mchimientih@unc.edu	Female	
20	19	Van	Boynton	vboyntoni@exblog.jp	Female	
21	20	Cris	Allcoat	callcoatj@phpbb.com	Male	
22	21	Nikki	Penburton	npenburtonk@home.pl	Female	
23	22	Fionnula	Dummigan	fdummiganl@dedecms.com	Female	
24	23	Wilhelm	Vannacci	wvannaccim@foxnews.com	Female	
25	24	Michelina	Matushevitz	mmatushevitzn@pen.io	Male	
26	25	Carissa	Eaddy	ceaddyo@irs.gov	Female	
27	26	Maurita	Monksfield	mmonksfieldp@unc.edu	Female	

Customers | Expenses | Invoices | Orders | +

Different Type of Data Type in Salesforce

Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary	A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Lookup Relationship	Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
External Lookup Relationship	Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Checkbox	Allows users to select a True (checked) or False (unchecked) value.
Currency	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date	Allows users to enter a date or pick a date from a popup calendar.
Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number	Allows users to enter any number. Leading zeros are removed.
Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist	Allows users to select a value from a list you define.
Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
Text	Allows users to enter any combination of letters and numbers.
Text Area	Allows users to enter up to 255 characters on separate lines.
Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Text (Encrypted) i	Allows users to enter any combination of letters and numbers and store them in encrypted form.
Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.
URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Exercise

Create a Custom Object Name **Student** with following fields

Sr. No	Field	Data Type	Required?
1	Email	Email	Yes
2	Phone	Phone	Yes
3	About	Text Area	No
4	Alumni	Checkbox	No
5	Annual Fee	Currency	Yes
6	Fee Discount (%)	Percentage	No
7	Enrolled Date	Date	Yes
8	College Left Date	Date	No
9	Date of Birth	Date	Yes
10	Department	Picklist	IT, CSE, CE, ME, ECE

Assignment 1

Create a Custom Object Name “**Teacher**” with following fields

Sr. No	Field	Data Type	Required?	options
1	Email	Email	Yes	NA
2	Phone	Phone	Yes	NA
3	About	Text Area	No	NA
4	Joining Date	Date	Yes	NA
5	Active?	Picklist	Yes	Yes No
6	Department	Picklist	Yes	Computer Science Civil Engineering Mechanical ECE IT

Assignment 2

Create following custom field in the "**Company**" Object

Sr. No	Field	Data Type	Required?	options
1	Contact Person Name	Text	Yes	NA
2	Contact Person Email	Phone	Yes	NA
3	About Company	Text Area	No	NA
4	Website	Url	No	NA
5	Active?	Picklist	No	Yes No
6	Address	Text Area (Long)	No	NA
7	Phone	Phone	Yes	NA

Agenda

- Global Picklist
- Custom Label

Global Picklist

Global Picklist - A global picklist is a restricted picklist by nature. Only a Salesforce admin can add to or modify its values. Users can't add unapproved values, even through the API.

- Global picklist value sets limits:
- Global picklist value sets have a combined active and inactive limit of 1,000.
- You can have up to 500 picklist global value sets in an org.
- There's no limit on the number of custom picklists that use global picklist value sets.
- If you apply a global picklist value set to more than 13 different objects, you can deactivate values from the picklist value set, but you can't replace any picklist values or delete values from the set.

Custom Label

1. Custom labels enable developers to create multilingual applications by automatically presenting information (for example, help text or error messages) in a user's native language.
2. Custom labels are custom text values that can be accessed from Apex classes, Visualforce pages, Lightning pages, or Lightning components. The values can be translated into any language Salesforce supports.

Exercise

- Create a Custom picklist to store the country values
- Create a Custom Label to Store the welcome Message

Assignment

- Create a Custom global picklist to store the State values for US and India

Agenda

Formula Field in Salesforce

Formula fields in Salesforce are the fields which are calculated fields from one or more fields on the Same object.

For Example, Calculating the Area of Circle, Calculating the Average Rating

Some Important Points –

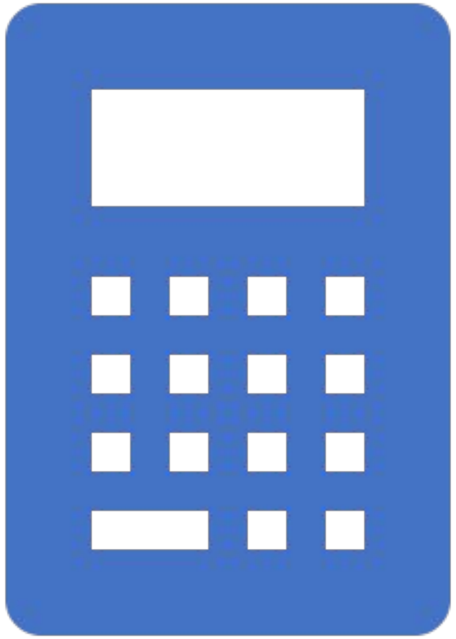
1. Formula Fields always calculate when the record is saved
2. Every time you open a record detail page all the formulas will be calculated.

Formula Field Limits and Restrictions

1. **Character limit—**Formula fields can contain up to 3,900 characters, including spaces, return characters, and comments. If your formula needs more characters, create separate formula fields and reference them in another formula field
2. **Save size limit—**Formula fields can't exceed 4,000 bytes when saved. The save size is different from the number of characters if you use multi-byte characters in your formula.
3. **Compile size limit—**Formula fields can't exceed 5,000 bytes when compiled. The compile size is the size of the formula (in bytes) including all of the fields, values, and formulas it references.
4. You can't use long text area, encrypted, or Description fields in formulas.

Exercise

1. Create Formula Field to Calculate the Student Age
2. Create a Formula Field to display the Link for the College Name
3. Calculate the formula field to calculate the total discount
4. Create a formula field to display the Final Fee
5. Create a formula field to display the College Image



Some important Formula Fields in Salesforce

TECHNICAL AMIT

Name	Description	Example
ISBLANK	Checks if the value for that field is blank or not	ISBLANK(Age__c)
PRIORVALUE	Returns the Previous value of the field	**PRIORVALUE**(Type)
CASE	CASE() is useful for writing formulas that have different results based on the value of a picklist.	CASE(Type, "Electrical", 1, "Electronic", 2, "Mechanical", 3, "Structural", 4, "Other", 5, 5)
IF	Conditional logic	IF(IsTask, ”A Task", ”An event")
TEXT	Convert picklist to text	**TEXT**(Status)
VALUE	Convert string to number	Value(Age__c)
ISNULL	Checks if number field is null or not. Use ISBLANK instead	ISNULL(Age__c)
ADDMONTHS	Add specified no of months in a date	ADDMONTHS(Today(), 12)
AND	Return True if multiple conditions are true	AND(ISBLANK(Age__c) , ISNULL(Age__c))
OR	Return true if any condition is true	OR (ISBLANK(Age__c) , ISNULL(Age__c))

Some important Formula Fields in Salesforce

TECHNICAL AMIT

Name	Description	
TODAY	Returns current date	TODAY()
NOW	Returns the current date along with the time	**NOW()**
TIMENOW	Return the time value without date	TIMENOW()
DATE()	The DATE() function returns a Date value, given a year, month, and day. Numerical Y/M/D values and the YEAR(), MONTH(), and DAY() functions are valid parameters for DATE()	DATE(YEAR(TODAY()), MONTH(TODAY()) + 3, 1)
DATEVALUE	Convert DateTime field to return the date only	**TEXT**(Status)
DATETIMEVALUE	Convert the Date field to return DateTime as well	Value(Age__c)

Exercise

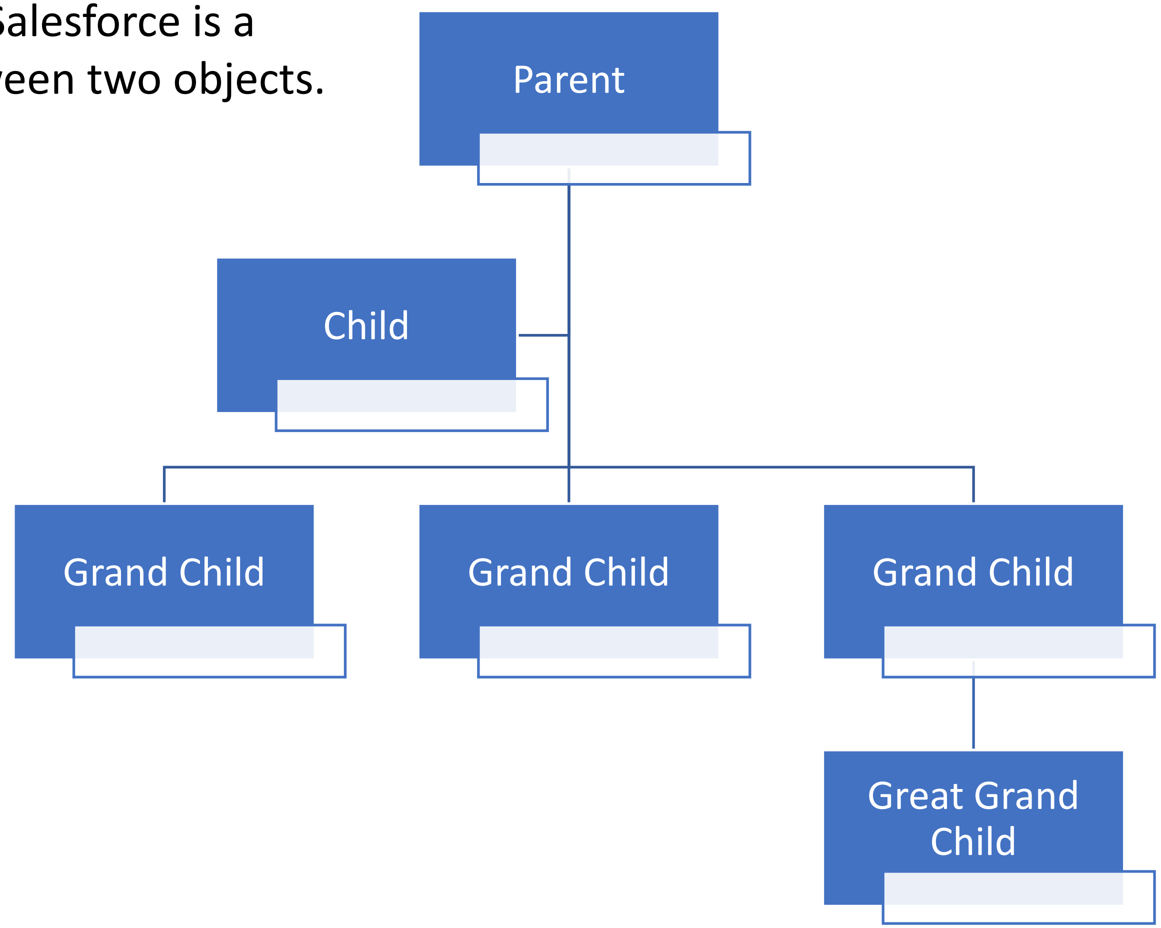
1. Create a Rating Picklist field with value starting from 1-5
2. Create a formula field to display the rating image
3. Create a formula field to display the department image

Agenda

1. Relationship fields
    1. Lookup
    2. Master-Detail
    3. Junction Object
    4. Self Lookup
    5. Hierarchical Lookup
    6. External Lookup

Relationship in Salesforce

An object relationship in Salesforce is a two-way association between two objects.



Lookup Field in Salesforce

1. Lookup fields in Salesforce are used to relate to Objects in a parent child fashion where Parent Record looks up to child record.
2. Lookup fields are loosely coupled
3. Lookup relationships can be one-to-one or one-to-many.
4. Lookup field will always be created on Child Object
5. Lookup field can be optional while creating the child record
6. If you delete parent record, child record will still be there in the system
7. You can have a maximum **of 40 lookups** on an object.

For Example, You have 2 Objects Students and College. Here College will be parent object and student will be child object.

In the above example, if college is deleted students will still be there because if college shuts down student is still student.

Exercise

- ❖ Create a Custom Object "**College**" with following field
- ❖ Create a **Tab for College and Add it to Education** Application
- ❖ Create a lookup field between **student and College** Object

Name	Datatype	Length	Decimal places
Name	Standard (Text)		
Address	Text Area		
Founded Year	Number (4, 0)	4	0
No of Departments	Number (4, 0)	4	0
Phone	Phone		
Email	Email		
Approved?	Checkbox		
Departments	Multi-Select		
Website	Url		

Assignment 1

- ❖ Create a Custom Object “**University**” with following field
- ❖ Create a Tab and add it it Education Application
- ❖ Create a Lookup field on the **College Object** which will lookup to **University**

Name	Datatype	Length	Decimal Places
Name	Standard (Text)	80	
About	Text Area Long		
Founded Date	Date		
Address	Text Area	255	
Total No of Colleges	Number(4,0)	4	0
Total Departments	Number(4,0)	4	0
Departments	Multi-Select		
Phone	Phone		
Email	Email		
Active	checkbox		
Approved?	Checkbox		
Website	Url		

Assignment 2

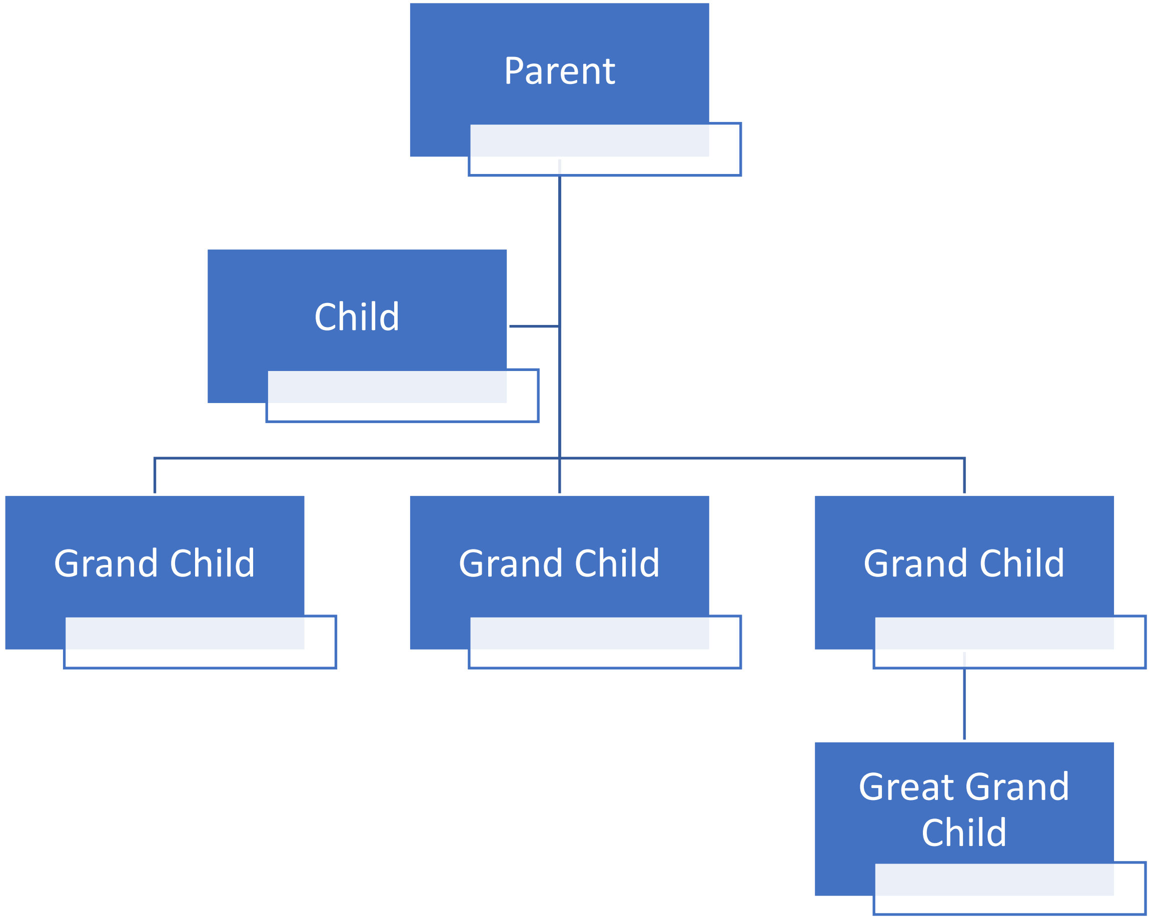
- ❖ Create a Custom Object “**Expense**” with following field
- ❖ Create a Tab and add it to Expense Tracker application

Name	Datatype	Length	Decimal Places	Parent Object	Picklist	AutoNumber format
Name	AutoNumber					EXP-{000000}
Company	Lookup			Company		
Amount	Currency	16	2			
Expense Date	Date					
Status	Picklist				Created Pending Approval Approved Rejected Reimbursed	
Approver	Lookup			User		
Approval Date	Date					
Approval Comments						
Rejection Comments						

Master-Detail Field in Salesforce

1. Like lookup Master detail field is also used to related two object with each other in a one-to-one or one-to-many fashion
2. M-D relationship is a tightly coupled relationship
3. Master Detail field is required while creating the child object
4. If we delete the parent record all the child record will also get deleted. If we undelete the parent from Recycle bin then all the child record will also get restored
5. Can Create Rollup Summary in Parent Record
6. We can only have 2 Master-Detail field in a single object
7. If two objects are related with Master-Detail Relationship child object do not have any owner field.
8. All the security schemes are inherited from Parent object for the child object
9. Any standard object can not be on the child side of relationship

Master-Detail Field in Salesforce



Exercise

1. Create a Custom Object called "**Rating**" with the following field

Name	Datatype	Parent Object	Picklist options	Formula
Rating Number	Standard (Auto Number)			
Behavioral	Picklist		1, 2, 3, 4, 5	
Lab	Picklist		1, 2, 3, 4, 5	
Education	Picklist		1, 2, 3, 4, 5	
Extras	Picklist		1, 2, 3, 4, 5	
Games	Picklist		1, 2, 3, 4, 5	
Average Rating	Formula(Text)			(Behavioral + Lab+ Education + Extras + Games) / 5
Student	Master-Details	Student		

Lookup vs Master Detail

Lookup Relationship	Master-Detail Relationship
Loosely Coupled	Tightly Coupled
Roll-up summary field not available.	Roll-up summary field available.
Parent record are not required while creating child record	Parent record are required while creating child record
Standard object record can be on the detail side of a custom object in a lookup relationship.	Standard object can not be a child
By default record ownership of child records is not controlled by the parent.	Record ownership is controlled by parent. That means if the user have access to parent child will be accessible
You can have a child record without a parent.	You can not have a child record without a parent.
You can have a maximum of 40 lookups on an object.	You can have a maximum of 2 MD on an object.
No Cascade delete available	Cascade delete available
Field can be made required from Field definition or from page layout	Field is required by default and can not be changed

Important Questions

1. Relationship between account and contacts?
2. Relationship between Account & Opportunity?
3. Can we create a M-D relationship where Standard objects are child?
4. Can we convert Lookup to master detail?
5. Can we convert master detail to lookup?

Important Questions

1. Relationship between account and contacts?
   - It's a special relationship where we have the ability of cascade delete. That means if we delete account all contacts will also get deleted but we can not create a rollup summary on account for contact object.
2. Relationship between Account & Opportunity?
   - It's act line Master-Detail but we can create an opportunity without account.
3. Can we create a M-D relationship where Standard objects are child?
   - No, Standard object can never be the on the child side when relationship is master-detail
4. Can we convert Lookup to master detail?
   - Yes, we can convert but as the master detail basic property is child will always require a parent record. So first we need to populate the lookup field with some parent values and then convert the relationship.
   - If we do not have any record for child object, then we can directly convert the field to Master-Details
5. Can we convert master detail to lookup?
   - Yes, we can but before converting the Master-Detail to lookup we need to make sure we have deleted all the roll-up summary fields on parent object

Assignment

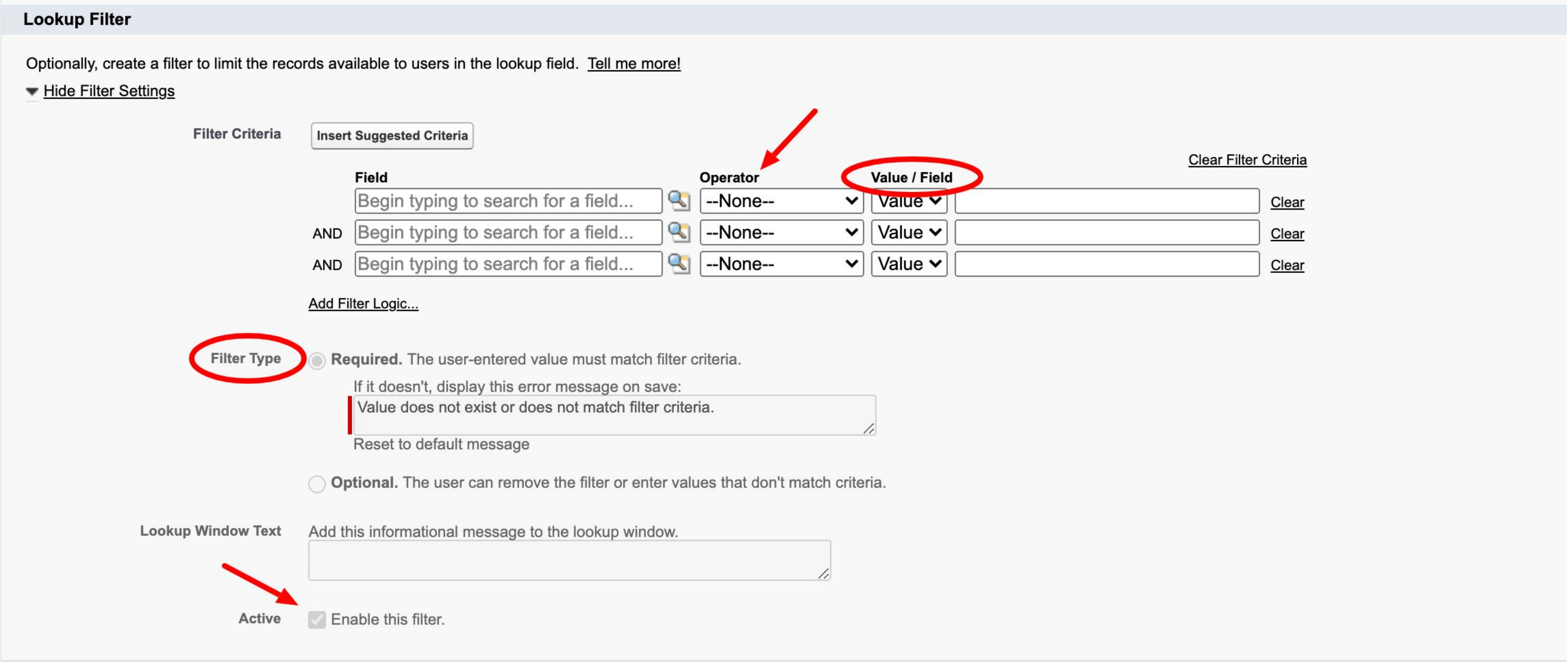
1. Create a Custom Object called “**Expense Item**” with the following field

Name	Datatype	Parent Object	Picklist options
Item Number	Standard (Auto Number)		
Amount	Currency(10,3)		
Date	Date		
Description	Text Area Long		
Type	Picklist		Inbound, Outbound
Expense	M-D	Expense	
Item Name	Text (255)		
Quantity	Number (4, 0)		

Lookup filters in Salesforce

1. Lookup filters are used to improve the search while selecting the parent object on the child record.
2. Lookup filters are used to Improve user productivity and data quality.
3. Lookup filters are administrator settings that restrict the valid values and lookup dialog results for lookup, master-detail, and hierarchical relationship fields.

Lookup filters in Salesforce



Exercise

1. Create a Lookup filter for the University field on the College Object so while selecting the University only Approved and Active University should be available

Assignment

1. Create a Lookup filter for Company Field on the Expense Object so that while selecting the company, only active company should be presented in lookup search

Junction Object in Salesforce

1. Junction object in Salesforce is used to relate two object in many-to-many fashion.
2. Junction object is also known as many to many relationship
3. Any custom object with 2 Master-Detail Object is a junction object
4. If we delete any parent record, then the junction object record will get deleted
5. Out of 2 master detail relationship there will be one relation which will be primary relationship. The relationship field which is created first is the primary relationship
6. Junction object will always inherit the security from Primary relationship

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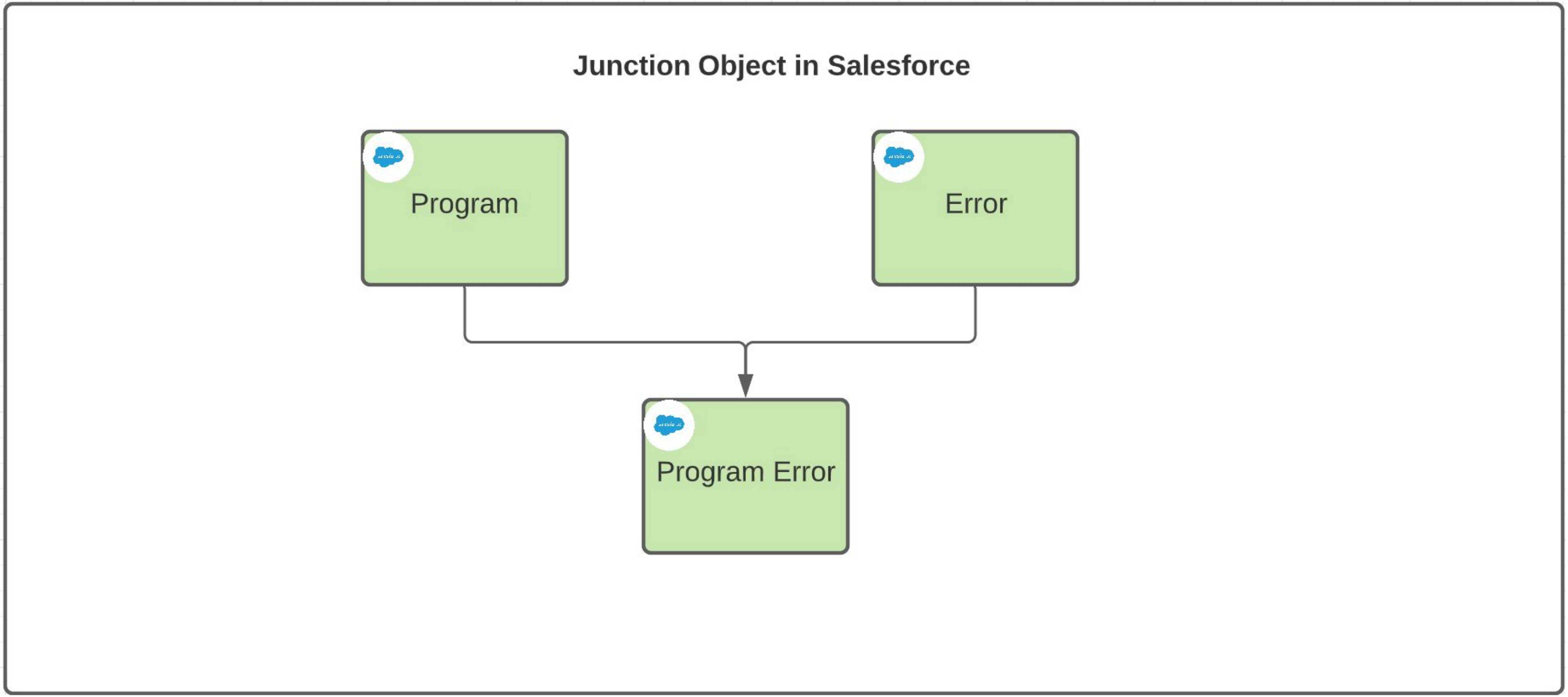


Examples - Junction Object in Salesforce

Example – Suppose you have 2 objects (Student & Subject) then 1 student can be associated to multiple courses and 1 Subject can be associated to multiple students. So here there will be a third object which will be Junction Object Named (Student – Subject)

Example 2 – You have two objects Error & Program. 1 Program can be associated to many errors and 1 error can be associated to many programs. Here junction object will be Program – Errors.

Example 3 – You have two object Customer & Product. 1 Customer can buy many product and 1 product can be associated to multiple customers. So here the junction object will be Customer Product.

Standard Object available in Salesforce

1. **Opportunity Product** (OpportunityLineItem) between Opportunity and Product
2. **Price Book Entry** between Pricebook and Product
3. **ContentDocumentLink** between sObject and Content Document

Exercise 1

1. Create a Custom Object "**Subject**" with following field
   - **Name** – This will be a standard field
   - **Description** – Text Area Long
2. Also, Create a Custom Tab and add it to Education Application.

Exercise 2

1. Create a Junction Object "**Student Subject**"
2. Also, Create a Custom Tab and add it to Education Application.

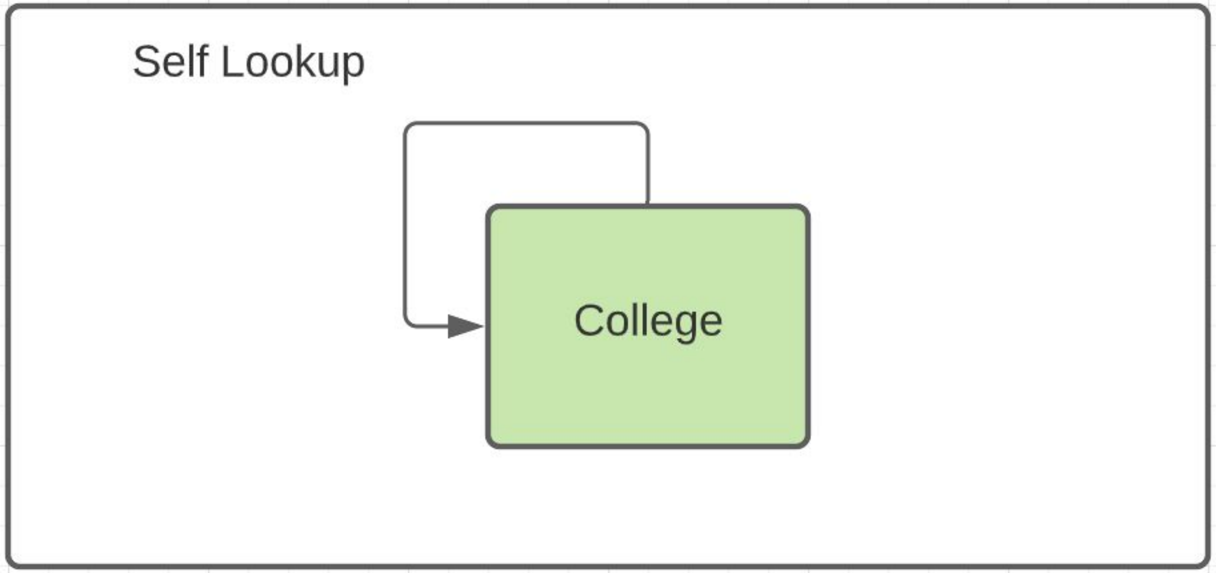
Assignment

1. Create Custom Object “**Program**” with only Name field
2. Create another Custom Object “**Error**” with only Name field
3. Create a Junction Object **Program Error**

Self Lookup & Hierarchy Lookup

Self Lookup – This is a lookup relationship with the self object. For example, You create a lookup relationship field on college with college.

Hierarchy Lookup – This is the special relationship which is only available for user object.



Cross Object Formula Fields

Cross Object Formula Fields are the formula fields which are created on the child record and having the value of the Parent Record Field.

1. **Example 1 -** Displaying the University Details under college object
2. **Example 2 –** Displaying the College Details under Student Object

Exercise

1. Create a formula field to display the college website under student record.
2. Create a formula field to display the college Address under student record
3. Create a formula field to display the university website under college object record.

Rollup Summary Fields in Salesforce

1. Roll-up summary fields calculate values from a set of related records, such as those in a related list
2. You can create roll-up summary fields that automatically display a value on a master record based on the values of records in a detail record
3. These detail records must be directly related to the master through a master-detail relationship.
4. COUNT, SUM, MIN & MAX are the supported methods for rollup summary

Rollup Summary Fields in Salesforce

Method	Description
COUNT	Count total no of child records
MIN	Displays the lowest value of the field you select. Only number, currency, percent, date, and date/time fields are available.
MAX	Displays the Highest value of the field you select. Only number, currency, percent, date, and date/time fields are available.
SUM	Totals the values in the field you select in the Field to Aggregate option. Only number, currency, and percent fields are available.

Exercise

1. Create a rollup summary field to count total no of reviews on student record.
2. Create a rollup summary field to count the total no of Open opportunity under an account.

Assignment

1. Create a rollup summary field to sum the total expense item under expense object.
2. Create a rollup summary field to count the total no of Closed opportunity under an account.
3. Create a rollup summary field to sum the amount of Closed Opportunities under an account

Field Dependency in Salesforce

1. Use dependent picklist to control the value of a picklist field based on another picklist field.
2. A dependent picklist is a custom or multi-select picklist for which the valid values depend on the value of another field, called the controlling field
3. A Standard Picklist can be a controlling and will never be depending picklist
4. A Custom picklist field can be both controlling or depending picklist
5. A Checkbox field can act as controlling field
6. A multi-select field can act as depending picklist but can not be controlling

For example, you can define a Reason custom picklist on opportunities and make its valid values depend on the value of the Stage picklist as follows:

- If Stage is **Closed Won**, the valid values for Reason are Superior features or Lower price.
- If Stage is **Closed Lost**, the valid values for Reason are Inferior features, Higher price, or Company viability.

Exercise

1. Create a Custom Global Picklist field **Region** with following values
    - APAC
    - EMEA
    - US
    - Canada

- Create another custom Global Picklist field ”**Zone**” with following values

- East Asia
- Oceania
- Southeast Asia
- Africa
- Europe
- Middle East
- UK + Ireland

- Mexico
- Caribbean
- Central America
- South America
- Midwest US
- Northeast US
- Southeast US

- Southwest US
- West US
- Northern Canada
- Mountains and the West
- The Prairies
- Central Canada
- East Coast

Exercise

1. Create 2 Custom field on University **“Region” & Zone**
2. Create the field dependency between these fields. Use the mapping from below sheet

Region	Zones
APAC	East Asia, Oceania, Southeast Asia
EMEA	Africa, Europe, Middle East, UK + Ireland
US	Midwest US, Northeast US, Southeast US, Southwest US, West US
Canada	Northern Canada, Mountains and the West, The Prairies, Central Canada, East Coast

Assignment

Create a Picklist field on Opportunity **Lost Reason** with following

Lost: Competitor

Lost: Price

Lost: Product Features

Lost: Project Abandoned

Lost: Company Budget Constraints

Lost: Other Reason

Won: Competitor

Won: Price

Won: Product Features

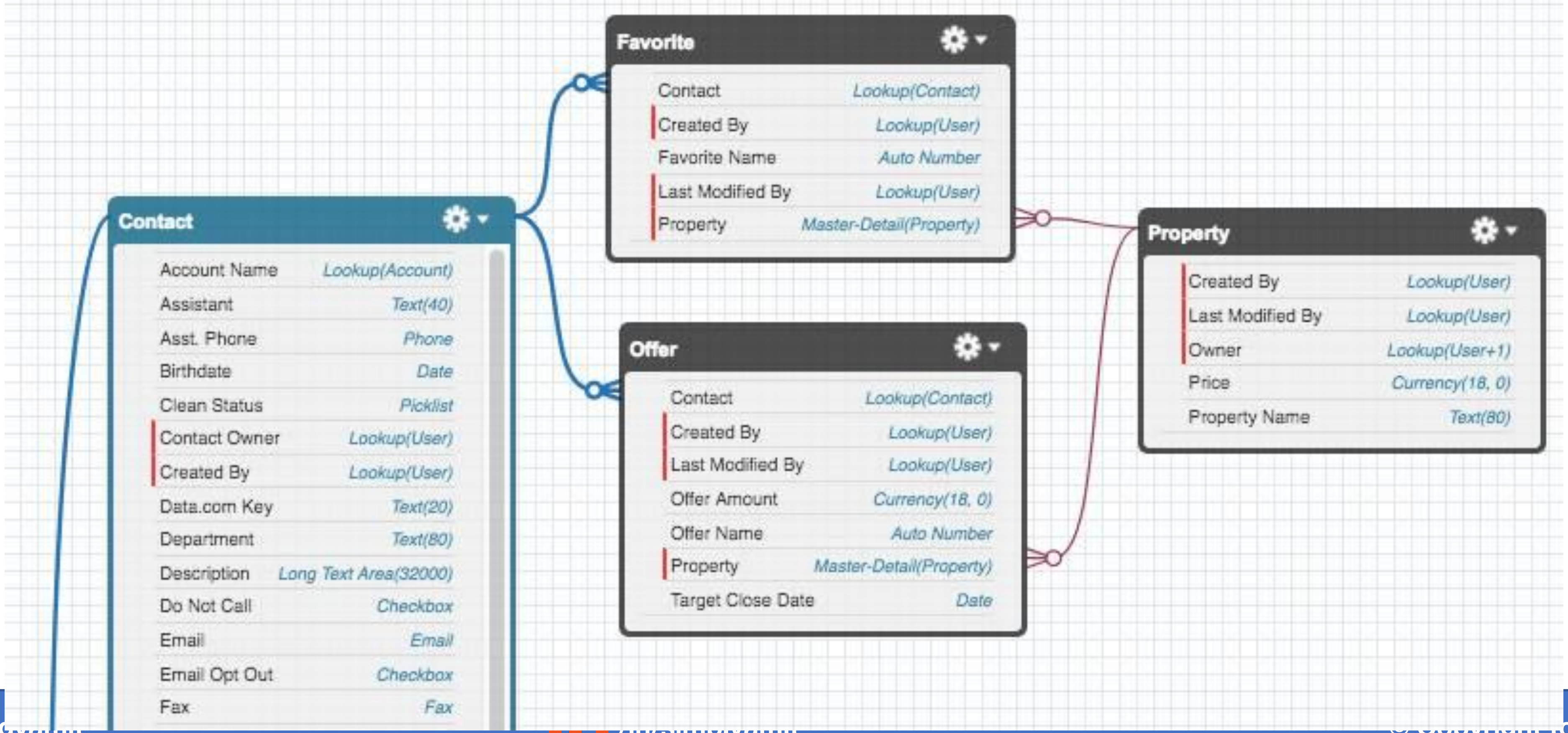
Won: Other Reason

Assignment

Create a Picklist field dependency where Opportunity Stage Name field will be controlling field and Lost Reason will be depending field. Map all the Lost Reason Field values to Closed Lost for Opportunity

Agenda - Schema Builder

Schema Builder - Schema Builder is a tool that lets you visualize and edit your data model. It’s useful for designing and understanding complex data models



What we can do with Schema Builder

- Create Object
- Create Field
- Change the Field label, Description and Help Text

Things to Consider Before Changing Field Data Type in Salesforce

Data loss is the arch-nemesis of any person working in any technical field, the thought is so scary it might even haunt you in your sleep, so to sleep well consider data loss and give its prevention utmost priority before changing your field's data type.

Situations of Data loss on field data type conversion:-

- Conversion to or from date or date/time
- Conversion to number from any other type
- Conversion to percent from any other type
- Conversion to Currency from any other type

Things to Consider Before Changing Field Data Type in Salesforce

- Conversion from Checkbox to any other type
- Changing from Picklist (Multi-Select) to any other type
- Changing to Picklist (Multi-Select) from any other type
- Changing from Auto Number to any other type
- Changing to Auto Number from any type except Text
- Changing from Text to Picklist

Read More: - https://www.forcetalks.com/blog/things-to-consider-before-changing-field-data-type-in-salesforce/

Validation Rules in Salesforce

1. Validation Rules in Salesforce are used to prevent the dirty data into the standard or custom object.
2. While creating the validation rule, we provide the formula or expression which will always evaluate to true or false
3. Validation rules also include an error message to display to the user when the rule returns a value of “True” due to an invalid value.
4. Validation Rule executes every-time we create or update a record

Example 1 - to enter the DOB we can put a validation to enter the date which is in past and have min 15 years in age.

Example 2 – For Student enrolment date will always be in past

Example 3 – Check if a field is null then display error message

Validation Rules in Salesforce

Important functions for interview and certifications

1. ISNEW
2. PriorValue

Exercise

1. Student DOB must be in past and min 15 years old
2. If Alumni field is No then College Left Date must be left blank
3. If Alumni field is Yes then college left date must be filled

Assignment

Create the following validation rules for the Expense Object

1. If Status is rejected, then Rejection Comments must be populated
2. If Status is approved, then Approval Comments must be populated
3. Once the status is approved or rejected then status can not be changed
4. https://help.salesforce.com/s/articleView?id=sf.fields_useful_field_validation_formulas.htm&type=5

Assignment

1. Create a validation rule on Account object to check if the Account Number filed is no Number then display error.
2. Create a Validation rule for account object to check if the length of account number is greater than 7 then display error. Make sure you check for the length only if the Account Number is not blank. Hint – User LEN function here
3. Create a validation rule on Contact Object to check if the Email field contains **test or Test or TEST or any form of test** then display error. Hint – user lowercase function
4. Create a validation rule for student object to display the error if the Fee Discount is greater than 15%

Duplicate Management in Salesforce

Keeping the data clean in Salesforce environment is very important. As part of duplicate management we will learn the duplicate rules in salesforce.

Duplicate Rules in Salesforce

1. Matching Rules in Salesforce
2. Duplicate Rules in Salesforce

Matching Rules in Salesforce

A matching rule defines how duplicate records are identified in duplicate rules and duplicate jobs. Salesforce provides standard matching rules for business and person accounts, contacts, and leads. You can also create custom matching rules.

Exercise -

Create a duplicate rule to prevent the duplicate student subject records in salesforce.

Duplicate Rules in Salesforce

A duplicate rule defines what happens when a user views a record with duplicates or starts creating a duplicate record.

Exercise -

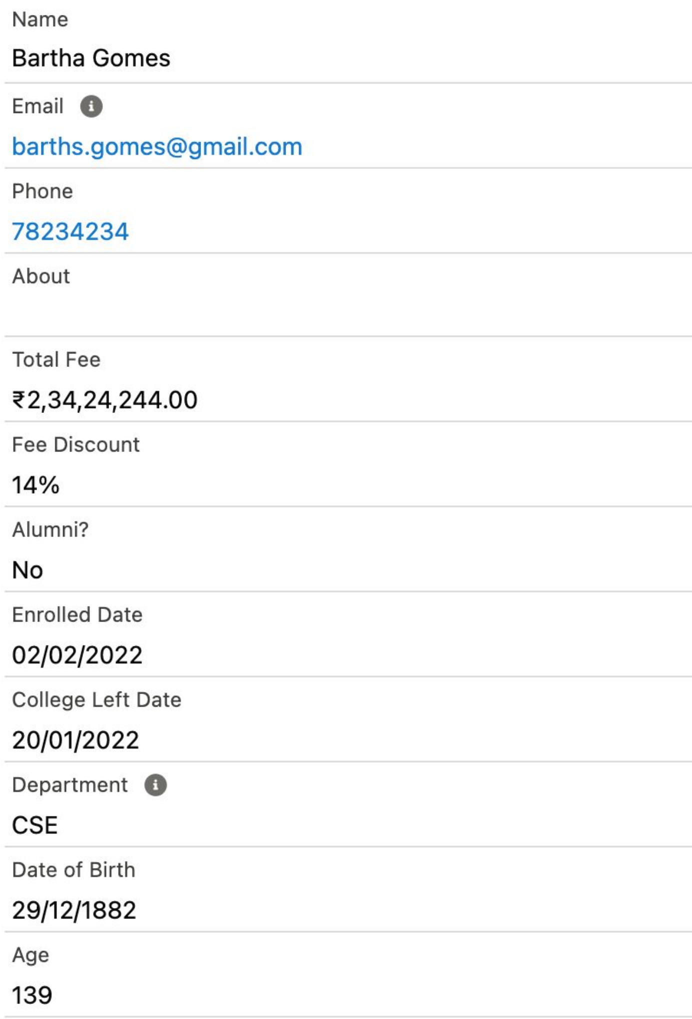
Create a Duplicate Rule to prevent the duplicate records of Student Subject Object and use the marching rules created in previous video.

Agenda

1. Page Layouts in Salesforce
2. Compact Layout in Salesforce

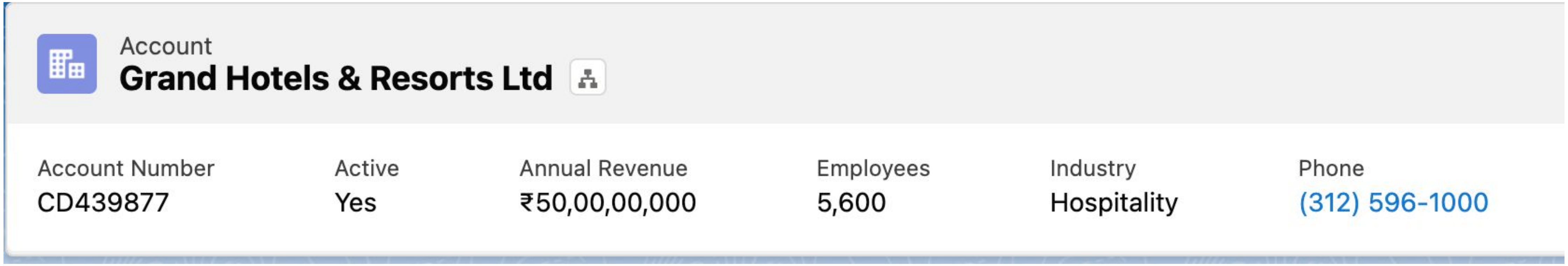
Page layout in Salesforce

1. Page layout in salesforce let's you customize how your users will see the record detail page.
2. With the help of page layout, you can control what your users will see and how it will look like.
3. Fields to display in edit and detail can be controlled from page layout
4. We can make field read only & required from page layout
5. Page layout also controls what all related records will be displayed in the parent record page.



Compact layout in Salesforce

- Compact layout is used to customize the fields that display for object records when viewed in the Salesforce mobile app and Lightning Experience.
- We can add up-to 10 fields in Compact layout
- There can be only 1 compact layout active at a time for an object



Exercise

1. Modify the Page Layout for the Student Object & Modify the related lists as well
2. Create a Compact layout for student object

Assignment

1. Modify the Page layout for the below objects along with the Related Lists
   - College
   - University
   - Rating
   - Subject
2. Create Compact Layout for all the above objects and assign that layout

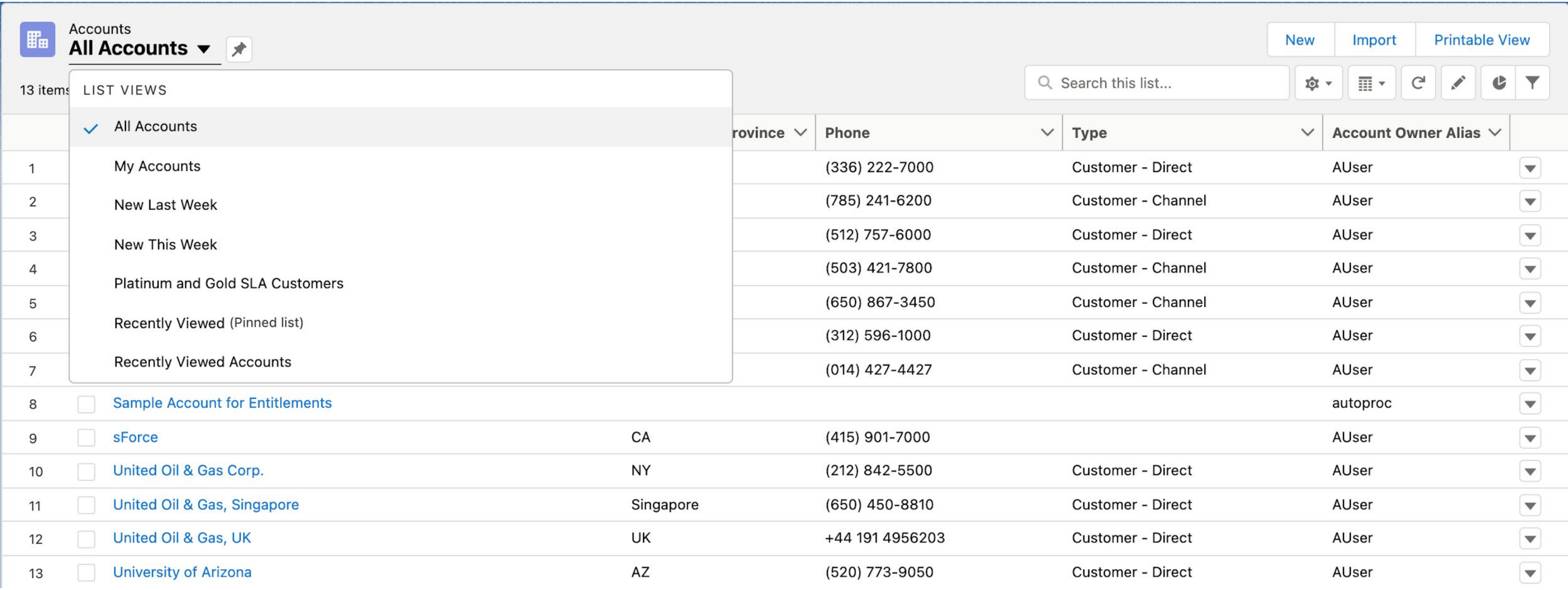
List Views in Salesforce

1. With List Views you can quickly see particular segments of your data and you can easily find your record.
2. With List Views you can segment your data based on some filters
3. You can also add some charts in List View
4. You can also update multiple records from list view at once
5. List View has the ability to filter either your own records or from all the records

Examples –

1. View All the Students Record
2. View Student based on the course they opted for along with the chart
3. View All the Account record based on Account Industry

List Views in Salesforce



Exercise

1. Create List View for Student Object to display students based on courses
2. Create a List view for student objects to display all the students records who enrolled this week
3. Create a List View for Student Object to Display all the Alumni records and also add a chart to it
4. Create 2 List View for University Object to display the Active and InActive Universities

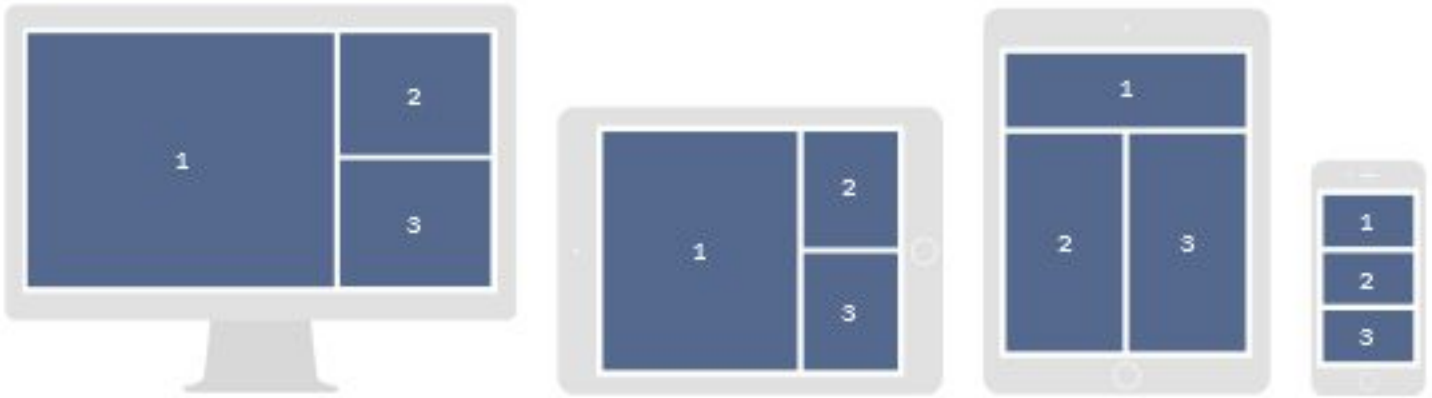
Assignment

1. Create 2 List Views for College Object to display Active and Inactive College
2. Create List View for Expense Object to Display the records for Each Status.
   - Hint: - The no of list views will be same as no of Status
3. Create a List View for Expense Object to Display all the Expenses Create THIS WEEK
4. Create a List View for Expense Object to Display all the Expenses Create THIS MONTH

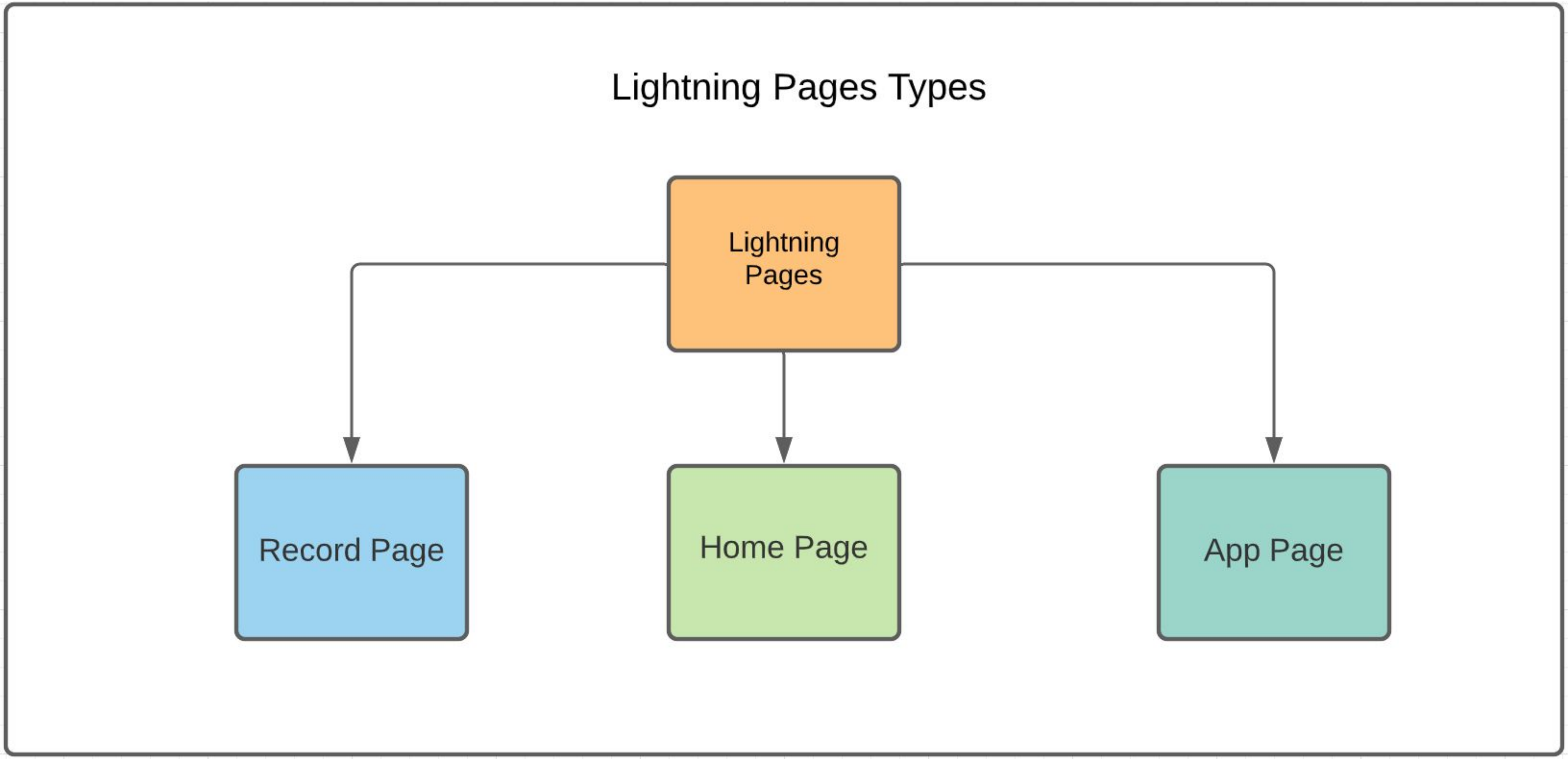
Note: - Feel free to add the charts in the list view

Lightning Pages in Salesforce

1. A Lightning page is a custom layout that lets you design pages for use in the Salesforce mobile app or Lightning Experience.
2. Like a page layout, Lightning pages allow you to add custom items to a page. However, these items, instead of being fields or Visualforce components, are Lightning components, reports, dashboards, which allow much more flexibility.
3. The Structure of the Lightning page is responsive

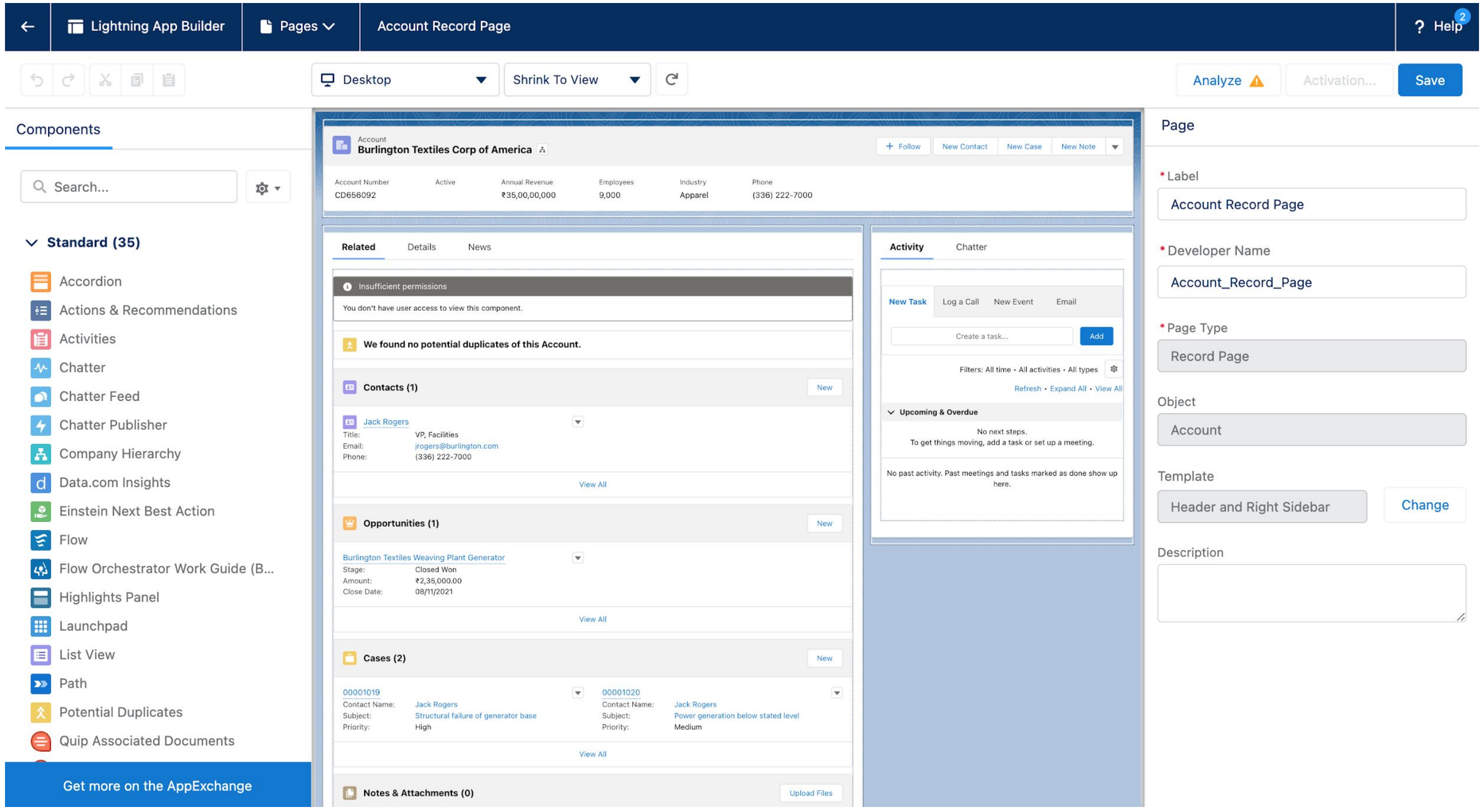


Lightning Pages Types



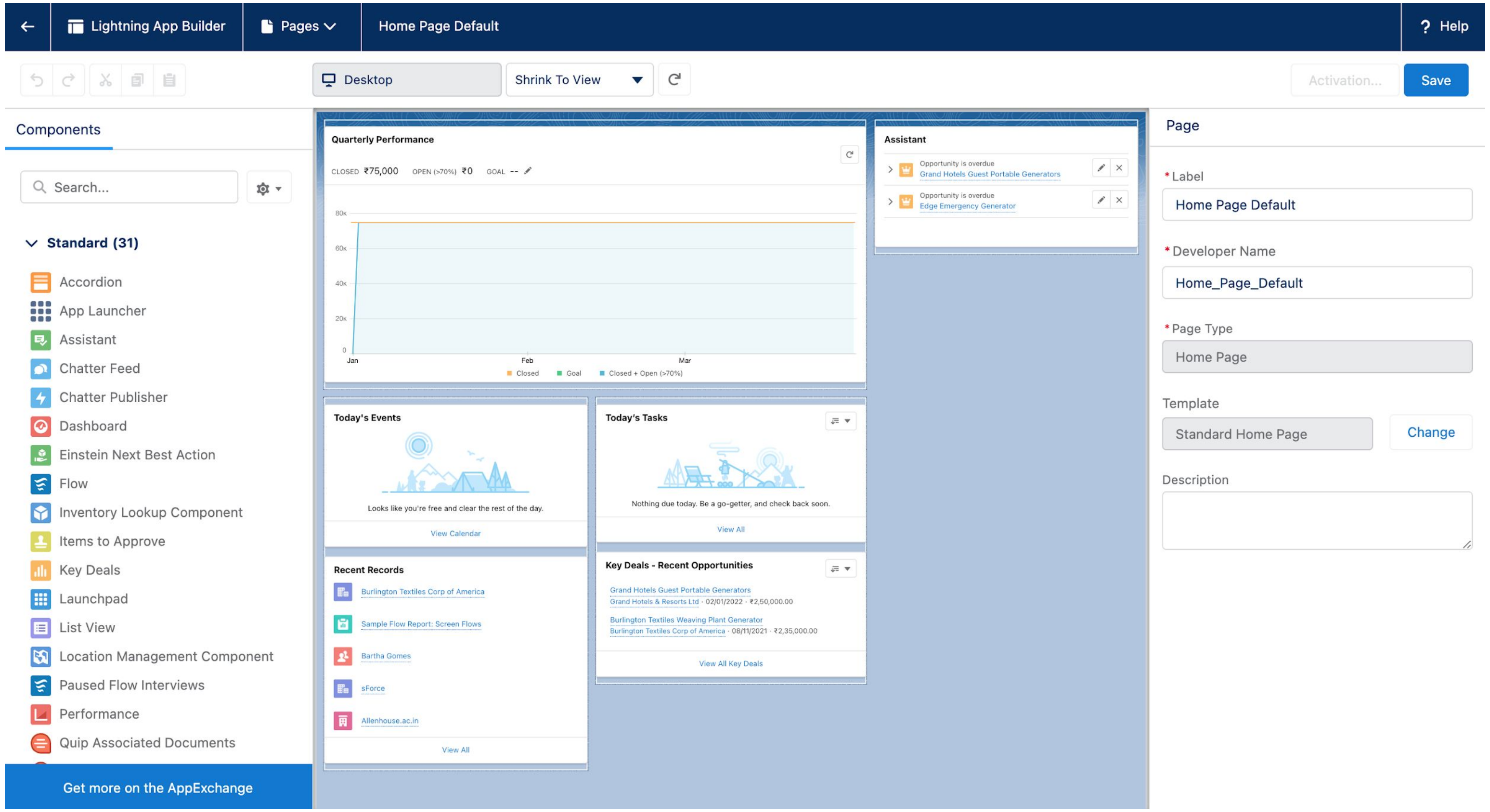
Record Page

With a record page, you can create a customized version of an object's record page, tailoring it to your users' needs. Custom record pages are supported in Lightning Experience and the Salesforce mobile app.



Home Page

Create Home pages with features relevant to specific types of users, and assign the customized pages to different apps or app-and-user-profile combinations. Custom Home pages are supported in Lightning Experience only.



App Page

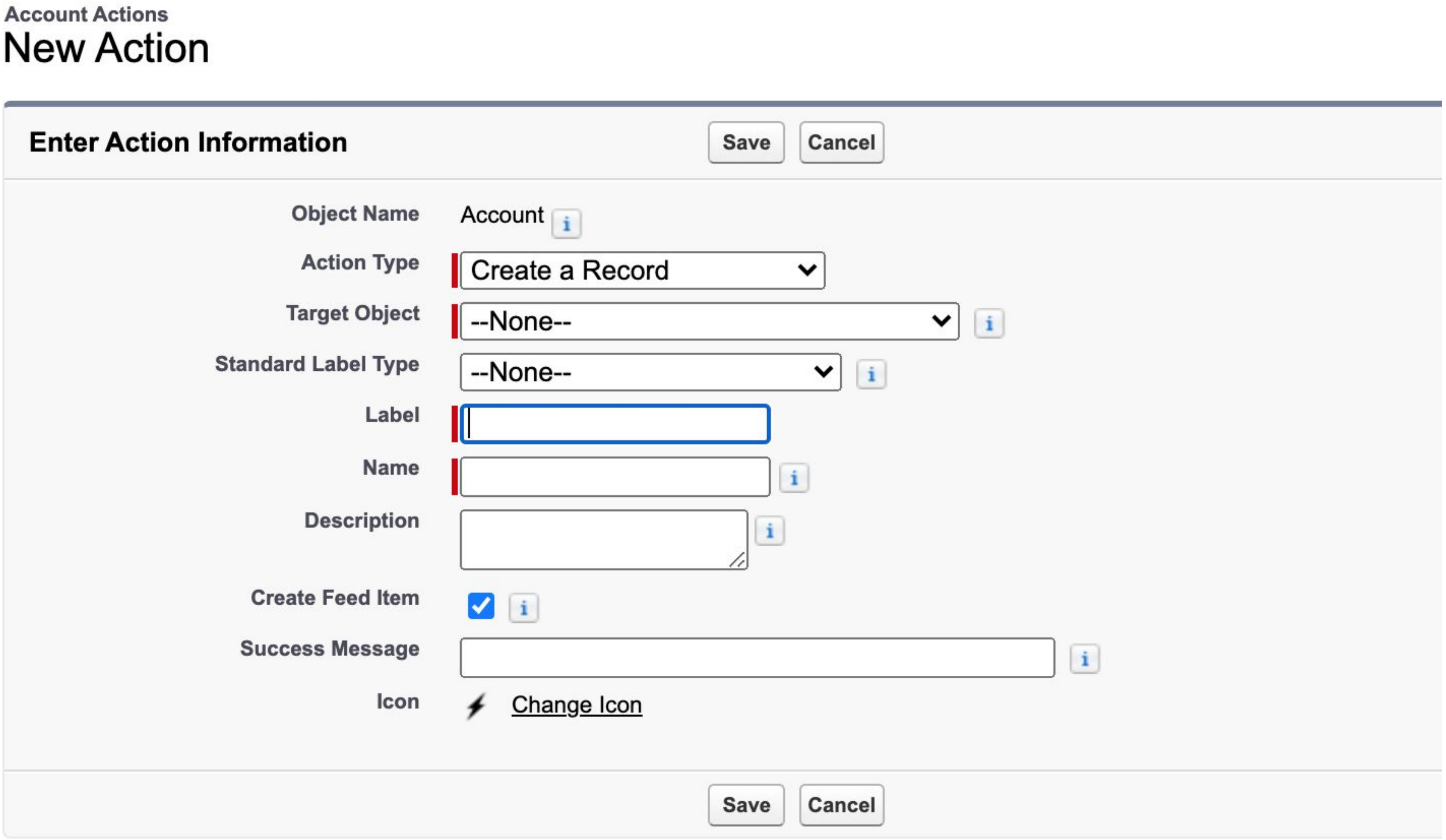
Use an app page to create a home page for a third-party app that you can add directly into the Salesforce mobile app and Lightning Experience navigation menus.

Your users then have an app home page where they can quickly access the most important objects and items.

Object Specific actions

1. Object-specific actions let users quickly create or update records, log calls, send emails, and more, in the context of a particular object.
2. Object-specific create actions create records that are automatically associated with related records
3. For example, you add an object-specific action on the Account object that creates contacts. If a user creates a contact with that action on the detail page for the Acme account, that new contact is associated with Acme.

Record Specific actions



Exercise

1. Create a record specific action on College object to quickly add the Student record.
2. On the page-layout only display the required fields and do not display the college field.
3. Pre-Populate the college filed using pre-defined fields.
4. Add a Success Message “Student Was Created”

Assignment

Assignment 1 –

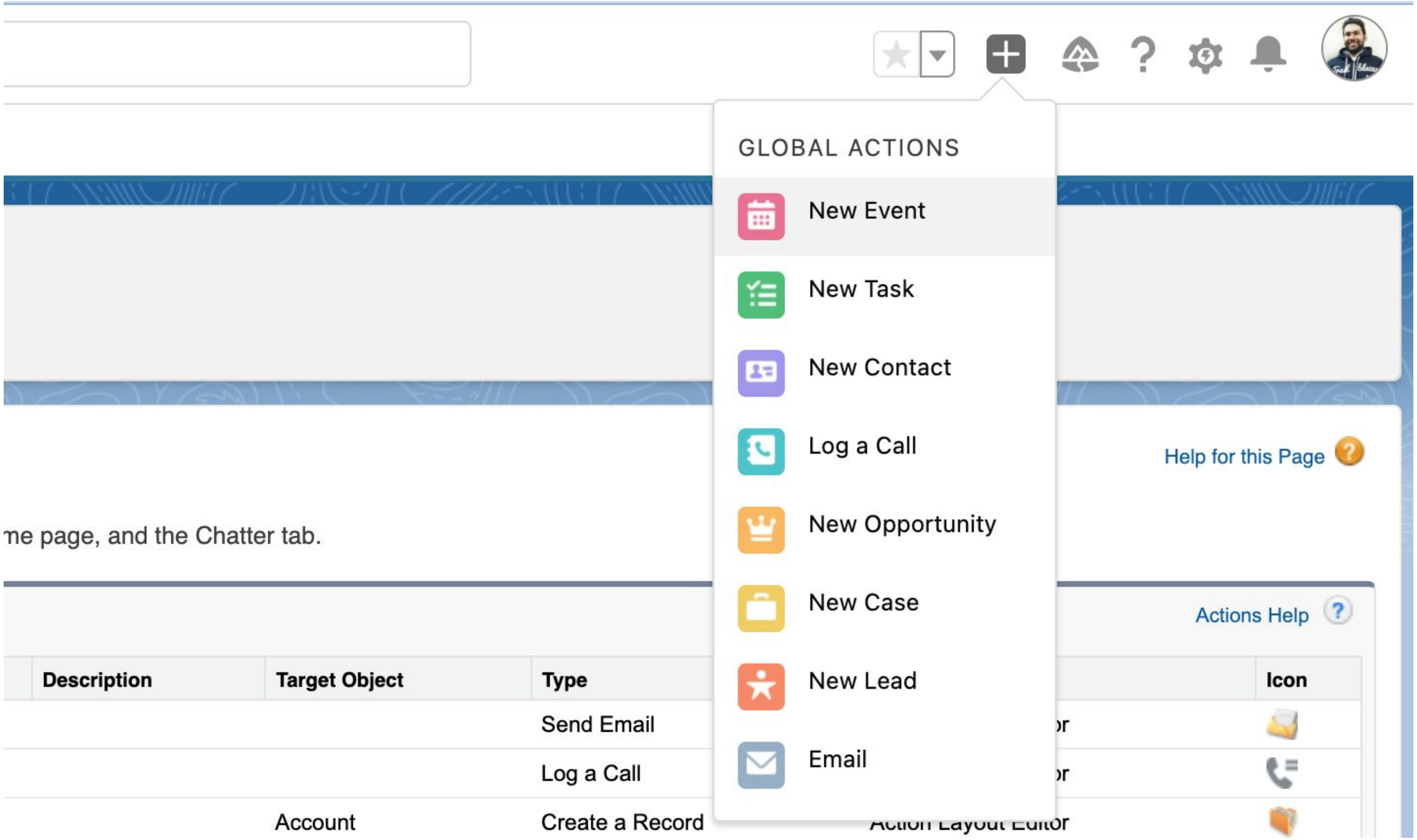
1. Create a Record specific action on Expense Object to Quickly add the Expense Item record.
2. Do not add Expense Field on the Layout and auto populated using pre-defined fields.
3. For Success Message Display "**Expense Item was created successfully**"

Assignment 2 –

1. Crete a record specific action on Company object to Quickly add the Expense Record
2. Do not add Company Field on the Layout and auto populated using pre-defined fields.
3. For Success Message Display "**Expense was created successfully**"

Global Actions

1. Use global actions to let users log call details, create or update records, or send email, all without leaving the page they're on
2. Global create actions enable users to create object records, but the new record has no direct relationship with other records.
3. You can add global quick actions to almost any page that supports actions.
4. Global actions live on a special layout of their own, known as the *global publisher layout*.


GLOBAL ACTIONS
New Event
New Task
New Contact
Log a Call
New Opportunity
New Case
New Lead
Email
page, and the Chatter tab.
Help for this Page
Actions Help
Description
Target Object
Type
Icon
Send Email
Log a Call
Account
Create a Record

Agenda

- Business Process in Salesforce
    - Lead Process in Salesforce
    - Sales Process in Salesforce

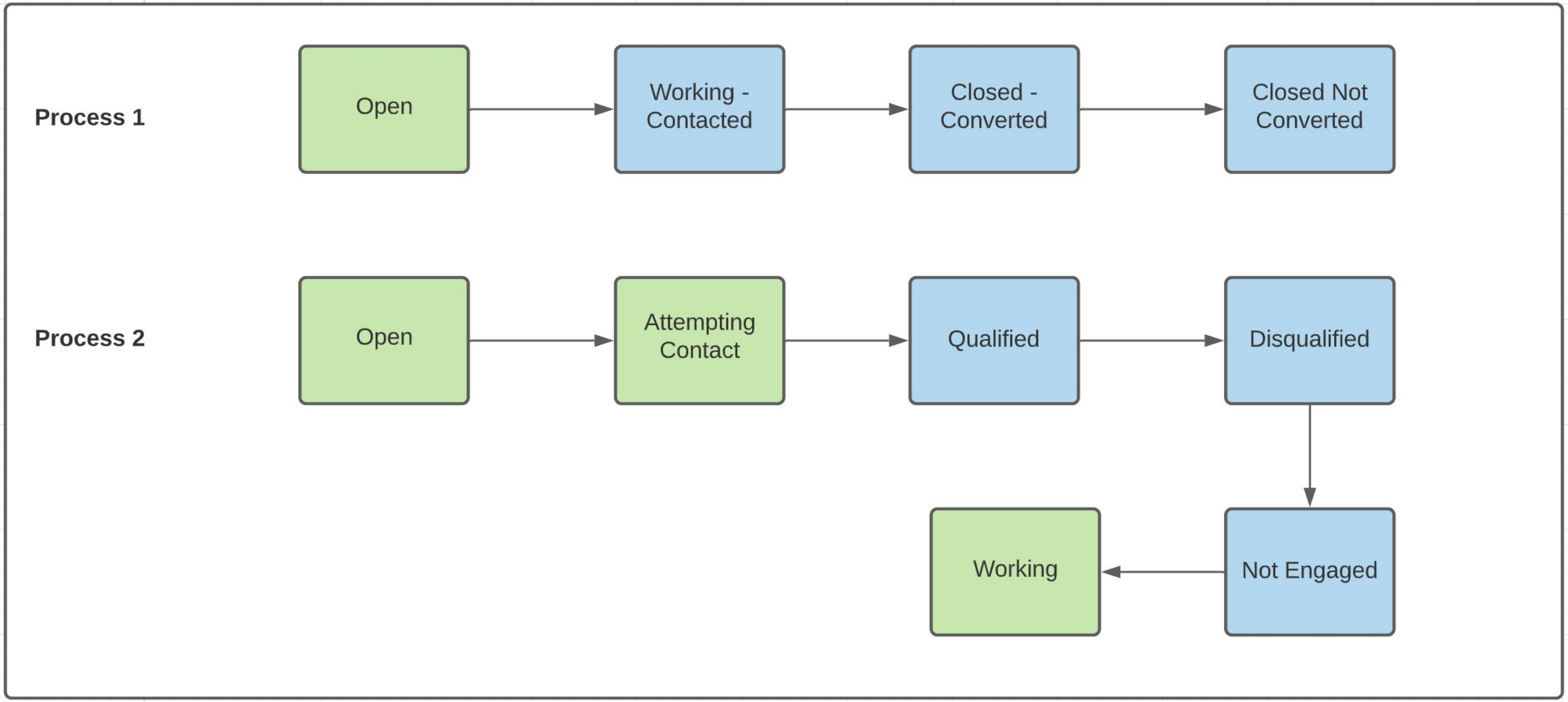
Business Process

Business Process allows you to track separate **sales, support, and lead** lifecycles across different divisions, groups, or markets

Available Business Processes:

1. **Sales Processes –** Create different sales processes that include some or all of the picklist values available for the Opportunity Stage field
2. **Support Processes –** Create different support processes that include some or all of the picklist values available for the Case Status field
3. **Lead Processes –** Create different lead processes that include some or all of the picklist values available for the Lead Status field
4. **Solution Processes –** Create different solution processes that include some or all of the picklist values available for the Solution Status field

Example – Convert Lead



Exercise 1

1. Add the following values to the Lead Status field
   - Open
   - Attempting Contact
   - Working
   - Qualified
   - Disqualified
   - Not Engaged
2. Create Both the two different Lead Process
   - US
   - International

Map Picklist Values

US	Open Working – Contacted Closed – Converted Closed – Not Converted
International	Open Attempting Contact Working Not Engaged Qualified Disqualified

Sales Process in Salesforce

1. The Sales Process is a series of repeatable steps that the sales team can take with a prospect.
2. Sales Process defines the different sales stages that an Opportunity moves through. For example, a donation may start as Prospecting and then become either Closed/Won or Closed/Lost.

Sales Process

1

Phase – 1
Prospecting

Process :
Uncover Facts
Gather Info
Unmet Needs
Pain Point

2

Phase – 2
Craft Solution

Process :
How We Help
Needs
Alignment
Relieving Pain

3

Phase – 3
Price/Quote

Process :
Document
Proposal
Pricing
Our Approach

4

Phase – 4
Negotiate

Process :
Discuss gaps
Re-work
Proposal
Deliver New
Doc

5

Phase – 5
Close

Process :
Closed Won or
Loss
Reasons
Win/Loss
Analysis

Exercise 2

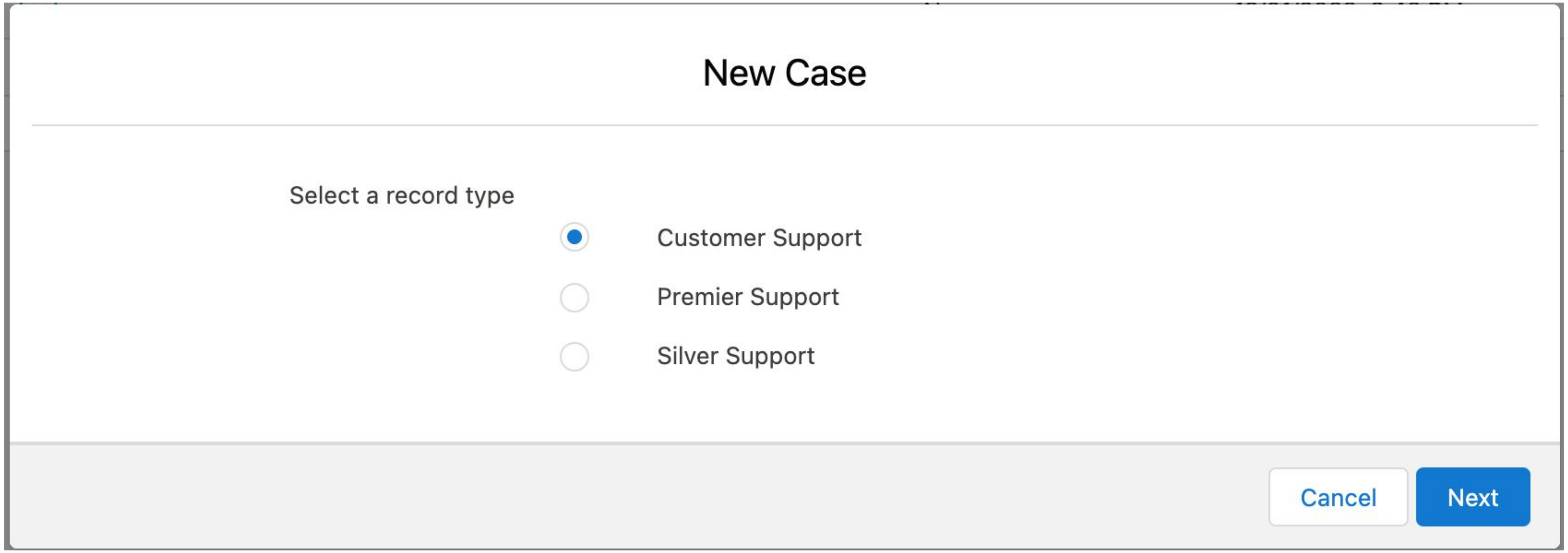
1. Create Sales Process for Opportunities
    1. US
    2. International

Map Picklist Values

US	Prospecting Qualification Needs Analysis Value Proposition Negotiation/Review Closed Won Closed Lost
International	Prospecting Qualification Needs Analysis Value Proposition Id. Decision Makers Perception Analysis Proposal/Price Quote Negotiation/Review Closed Won Closed Lost

Record Type in Salesforce – Part 1

1. **Record types in Salesforce** allow you to have different business processes, picklist values, and page layouts to different users based on profile.
2. You might create record types to differentiate your regular sales deals from your professional services engagements, offering different picklist values for each. Different Page-Layout which will have different fields. You can also create different record pages.



Exercise 1

1. Create the Record Type for the Account Object
   1. Customer Account
   2. Partner Account
   3. Other Account

Map Picklist Values

Record Type	Type Picklist Values	Industry Picklist Values
Customer Account	Prospect, Customer - Direct, and Customer - Channel	Food & Beverage Education
Partner Account	Channel Partner / Reseller, Technology Partner, Installation Partner	Consulting Insurance Technology
Other Account	Other	Other

Record Type in Salesforce – Part 2

1. Create Record Types for Lead Object
2. Assign Page-Layout for Each Record Type
3. Modify the Page Layouts

Exercise

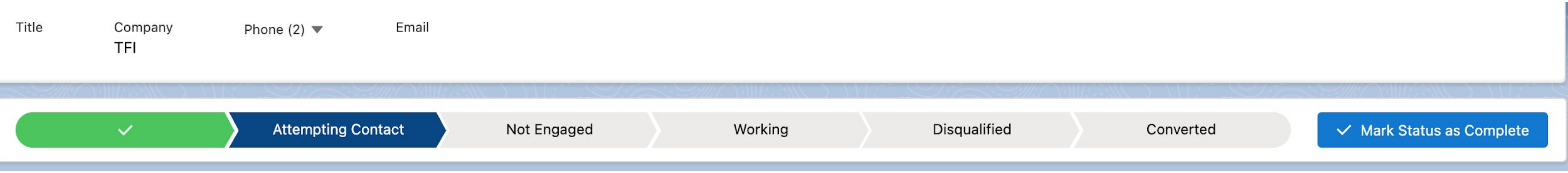
1. Create Record Type for Students
   - Alumni
   - Student
2. Create the Page Layout for both the record type
3. Modify the page layout

Assignment

1. Create the following Record Types for the Expense Object
    - Inbound Expense
    - Outbound Expense
2. Create the Different Page Layout for both the Record Type
3. Do the Record Type Assignment
4. Modify the Page Layout according to your need and test

Path In Salesforce

1. With the help of path in Salesforce you can help to Boost productivity and help reps gather complete data
2. Create paths to guide your users through steps of a business process, such as working an opportunity from a fresh lead to a successfully closed deal.
3. At each step of a path, you can highlight key fields and include customized guidance for success.



Exercise

1. Create a New Picklist field for University object
   - Applied
   - In Review
   - Need More Information
   - Working
   - Approved
   - Rejected
2. Create the Path for University Object
3. Create a Path for Lead Object

Web-To-Lead in Salesforce

Salesforce lets you to capture the lead directory from your website using Web-To-Lead form.

You can generate upto 500 Leads from the website everyday.

You can also enable the captcha for web to lead form to prevent the spams.

Lead Management in Salesforce

Field History in Salesforce

- You can select certain fields to track and display the field history in the History related list of an object.
- Field history data is retained for up to 18 months through your org, and up to 24 months via the API
- Field history tracking data doesn’t count against your Salesforce org’s data storage limits.

Agenda

1. Automation Tools in Salesforce
   - WFR
   - Process Builder
   - Flow Builder
   - Approval Process

Workflow Rule in Salesforce

1. Workflow lets you automate standard internal procedures and processes to save time across your org.
2. A *workflow rule* is the main container for a set of workflow instructions.
3. These instructions can always be summed up in an if/then statement.

Edit Rule

= Required Information

Object Account

Rule Name

Description

Evaluation Criteria

Evaluate the rule when a record is:

- created
- created, and every time it's edited
- created, and any time it's edited to subsequently meet criteria

How do I choose?

Rule Criteria

Run this rule if the criteria are met :

Field	Operator	Value	
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Add Filter Logic...

Previous Save & Next Cancel

Workflow can

1. Update the same record field
2. Can Created Task for the same record
3. Can Send Email
4. Can send Outbound Message
5. Can Update Parent Record Field if the relationship is Master-Detail

Process Builder

Process builder is also an automation tool and is an extension of Workflow which can do everything a workflow can do except Sending outbound message.

1. Create Related or Un related record
2. Update Parent and Child Records
3. Can Call flow builder
4. Can Call Apex
5. Can do a chatter post
6. Can Send Email
7. Can Invoke Approval process and Many more

Introduction to Flow Builder

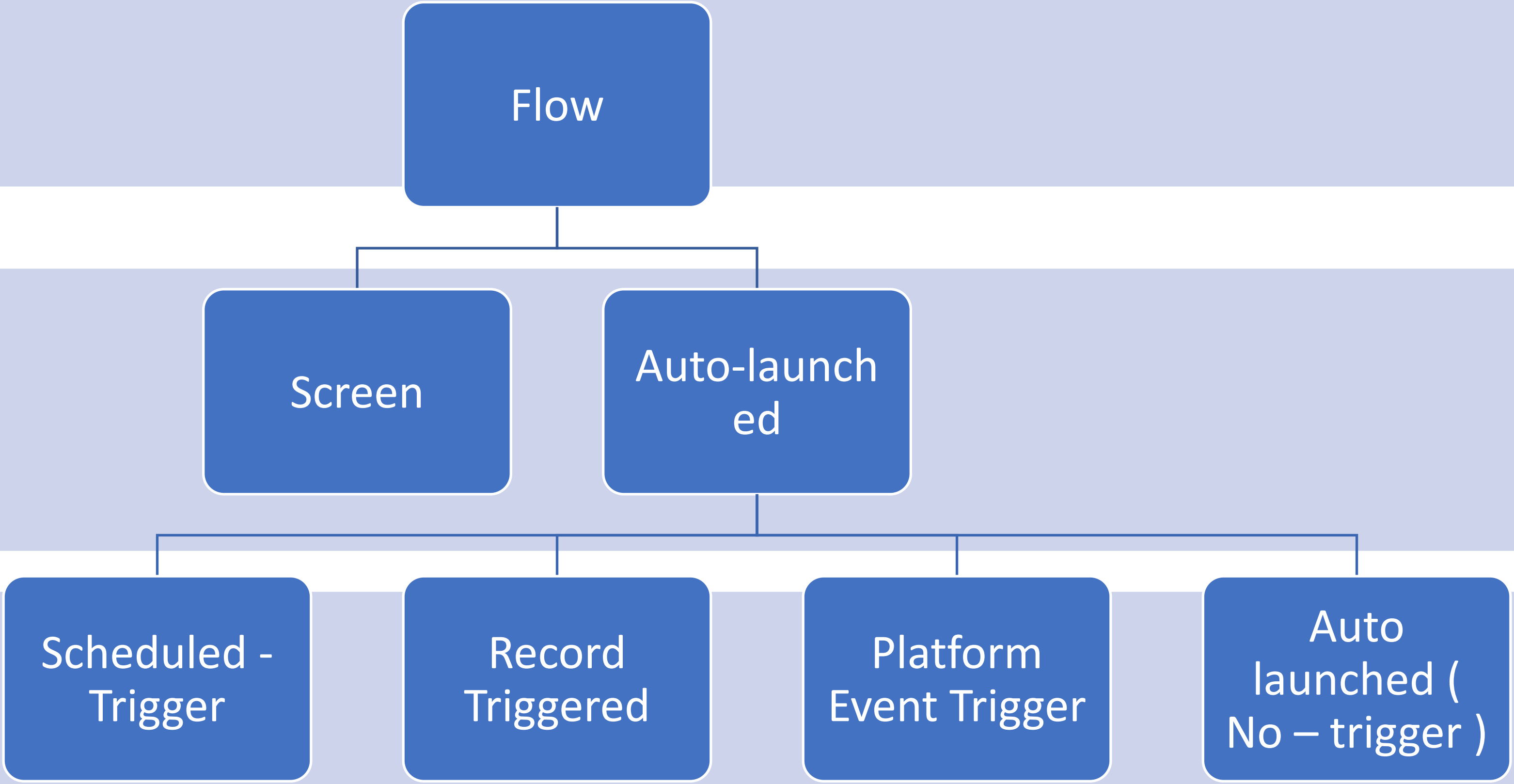
1. Flow is an automation tool provided by salesforce which can be used to perform various tasks like, Sending an Email, Posting a chatter, Sending the custom Notifications & etc.
2. Flow is the most powerful automation tool provided by salesforce.
3. Flow can be trigger for record insert, update and record delete and it can be run for both after and before events.
4. Salesforce Flow builder also has the capability so that you can have a screen and user can do some actions from there.
5. You can also schedule the flow to run after some recurring interval.

Types of Flow in Salesforce

Flow

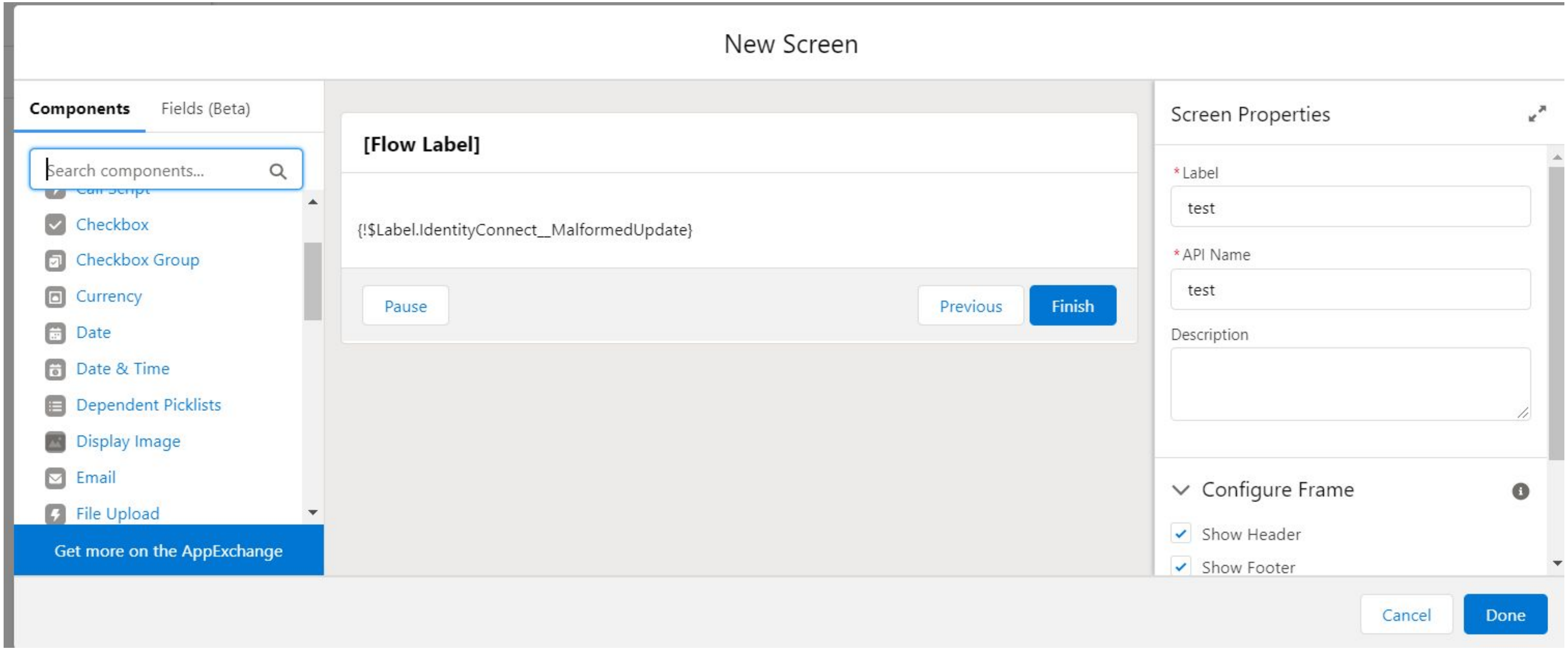
2 Types

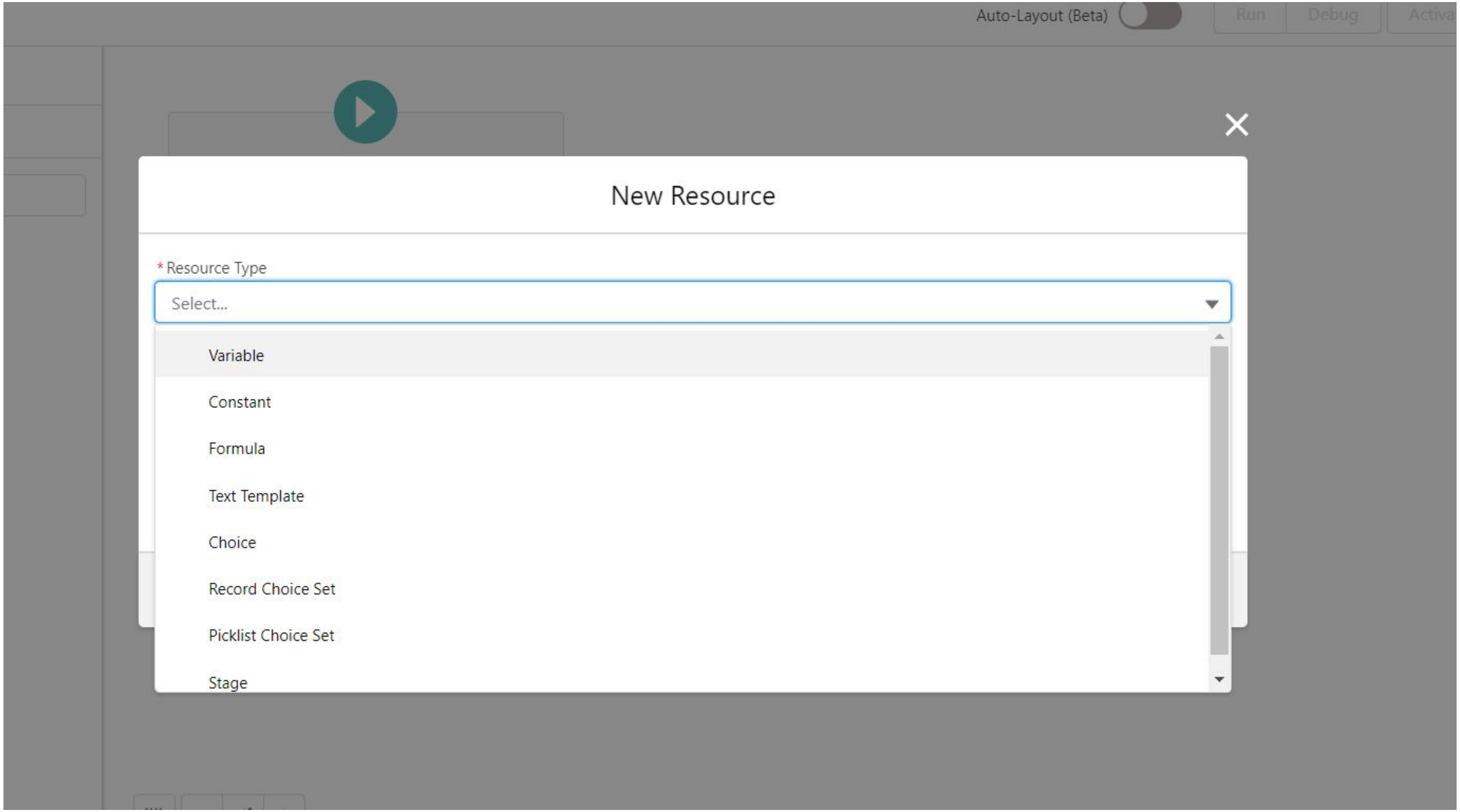
Auto-Launched flow

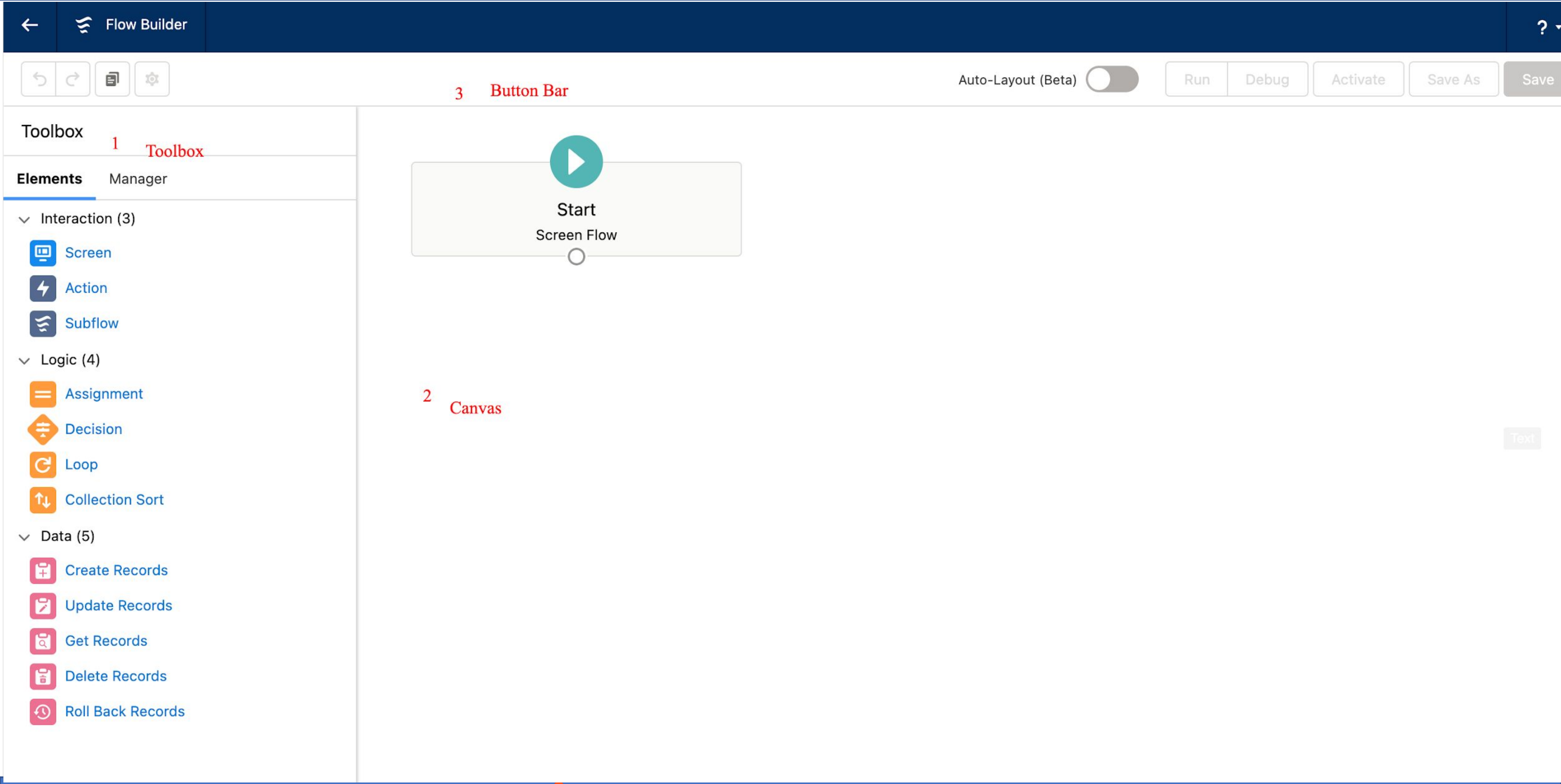


Flow Components

- Interaction
  - Screen
  - Action
  - Sub Flow
- Logical
  - Assignment
  - Decision
  - Loop
  - Collection Sort
- Data (SFDC)
  - Create Record
  - Update Record
  - Delete Record
  - Get Record


New Screen
Components
Fields (Beta)
Search components...
Checkbox
Checkbox Group
Currency
Date
Date & Time
Dependent Picklists
Display Image
Email
File Upload
Get more on the AppExchange
[Flow Label]
{!$Label.IdentityConnect__MalformedUpdate}
Pause
Previous
Finish
Screen Properties
* Label
test
* API Name
test
Description
Configure Frame
Show Header
Show Footer
Cancel
Done


Auto-Layout (Beta)
Run
Debug
New Resource
* Resource Type
Select...
Variable
Constant
Formula
Text Template
Choice
Record Choice Set
Picklist Choice Set
Stage


Flow Builder
Auto-Layout (Beta)
Run
Debug
Activate
Save As
Save
3 Button Bar
Toolbox
1 Toolbox
Elements
Manager
Interaction (3)
Screen
Action
Subflow
Logic (4)
Assignment
Decision
Loop
Collection Sort
Data (5)
Create Records
Update Records
Get Records
Delete Records
Roll Back Records
Start
Screen Flow
2 Canvas

Agenda

- Introduction to Screen flow
- Develop a Screen flow
- Debug the flow
- Call the flow from a button
- Create a Variable

Screen Flow

Screen flows are the flows where we have the user interaction and user will see a UI where they can either enter some inputs or select of records.

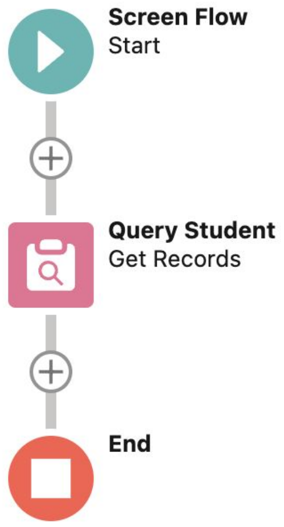
For Example, You wanted to create an Account record using Screen Flow where the user need to input all the required fields and then on click on submit button the account is created.

TECHNICAL AMIT

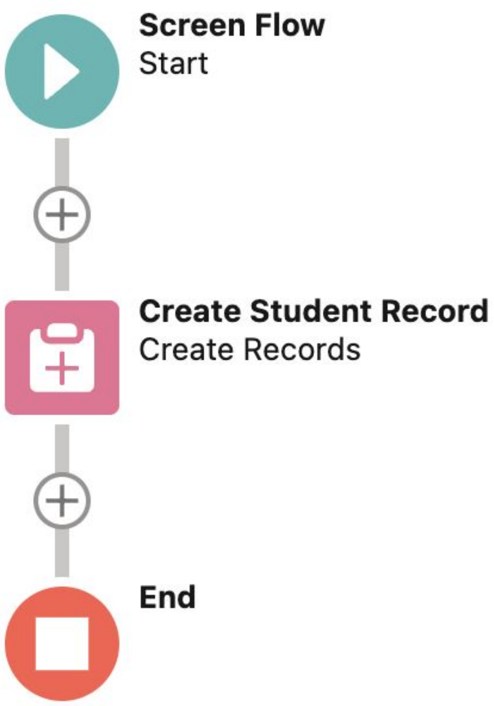
Agenda

1. Create a variable in Flow to Read Record Id from Detail Page
2. Create a formula field
3. Work with Single Picklist Choice
4. Checkbox Button
5. Radio Buttons

Flow: Get Records in Salesforce

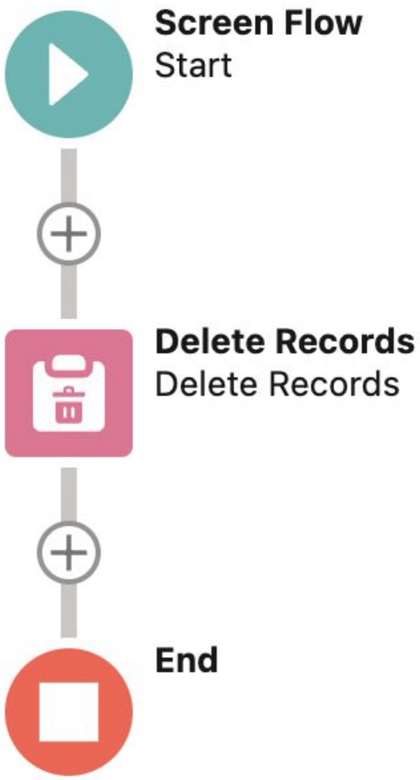


Flow: Create Records in Salesforce

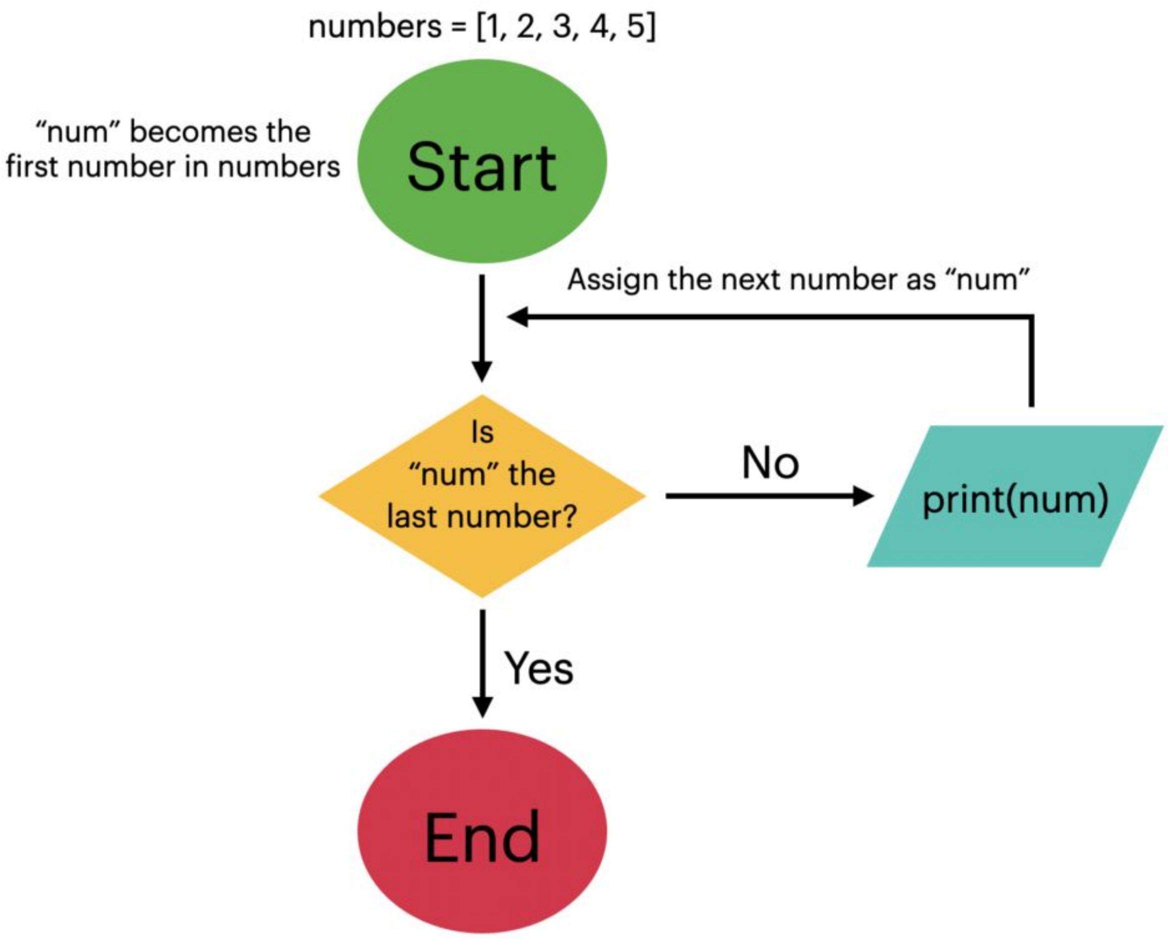


Flow: Update Records in Salesforce

Flow: Delete Records in Salesforce



For Loop in Salesforce Flow



Scenario

Create Opportunity Record using Screen flow which will have following fields

1. Name
2. Account Name
3. Close Date
4. Stage Name
5. Description
6. Lead Source
7. Type

Auto Launched Flow

As name suggests these are flows which can be launched automatically based on certain conditions or situations.

For example, we can call a flow from process builder, when there is any DML occurs like (Insert, Delete, Update) or we can call the flow if there is any platform event occurs.

Types of Auto launched flow

- Record Triggered Flow
- Scheduled Flow
- Auto Launched flow (NoN Record-Triggered flow)
- Platform Event Trigger

Record Triggered Flow

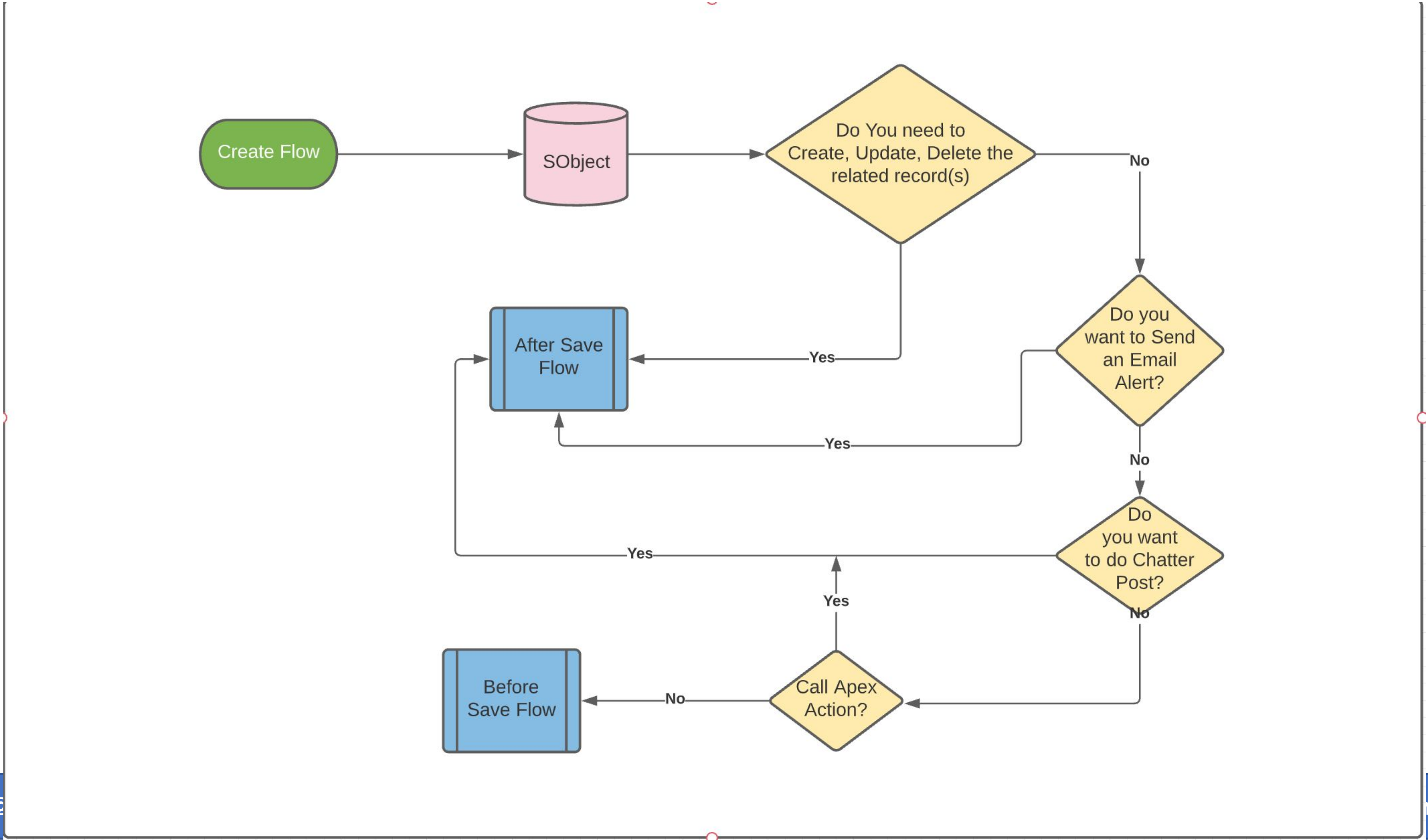
A record-triggered auto-launched flow makes additional updates to the triggering record before it's saved to the database. Understand the considerations and special behaviours of flows that make before-save updates.

Types of Record Triggered Flow

1. **Before Save –** Is useful while updating the field of the same record. No DML is required and it is faster than after save flow.
2. **After Save –** Is useful while working with actions, related records, calling the apex and many more. If we wanted to update the fields or created the records DML is required. It is slow as compared to Before Save flow

TECHNICAL AMIT

When to use which flow

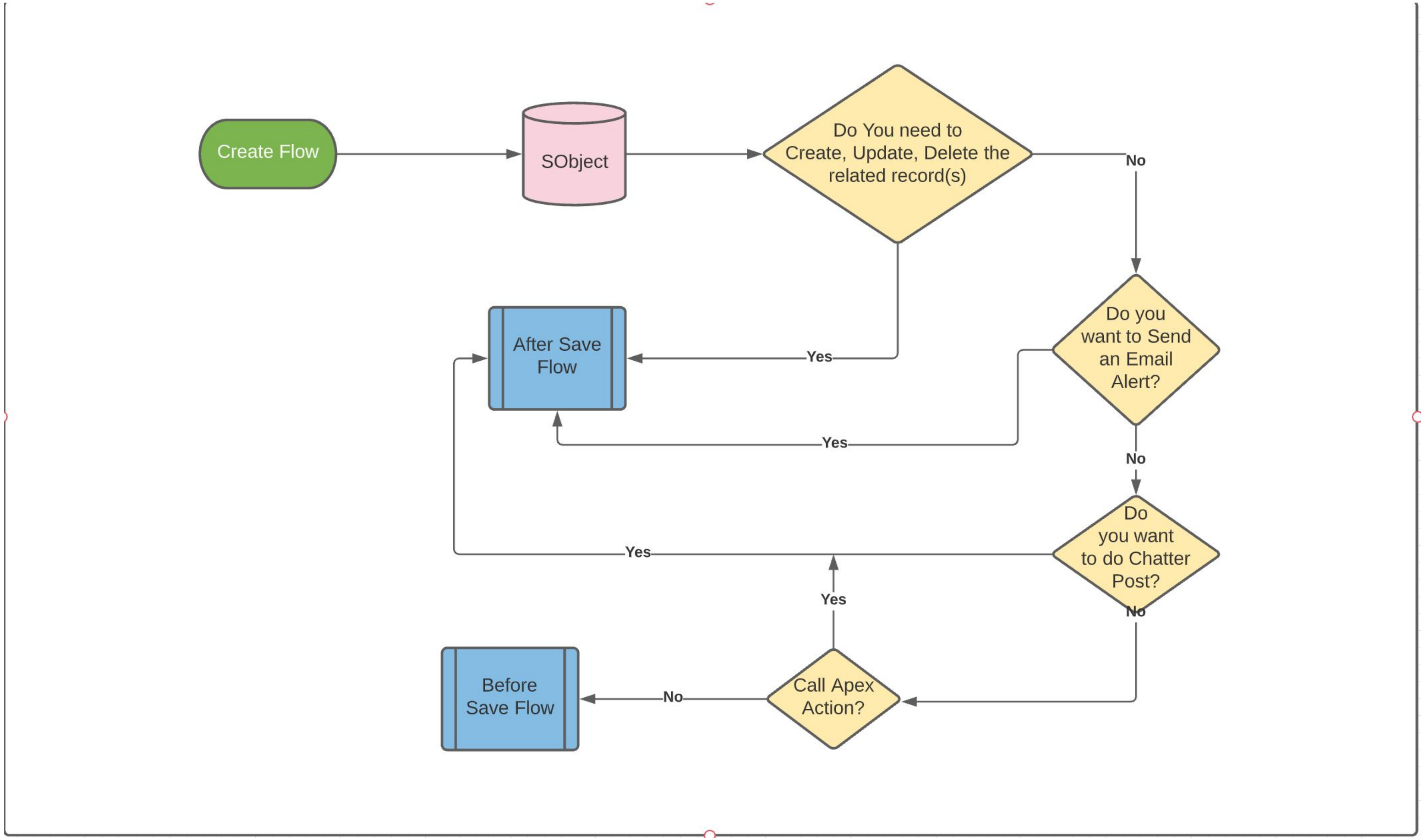


Scenario

1. Create a Custom label for the Account Records which are having industry as Education.
2. Create a Process which will check if the Account Industry is Education, then update the description given inside a custom label.

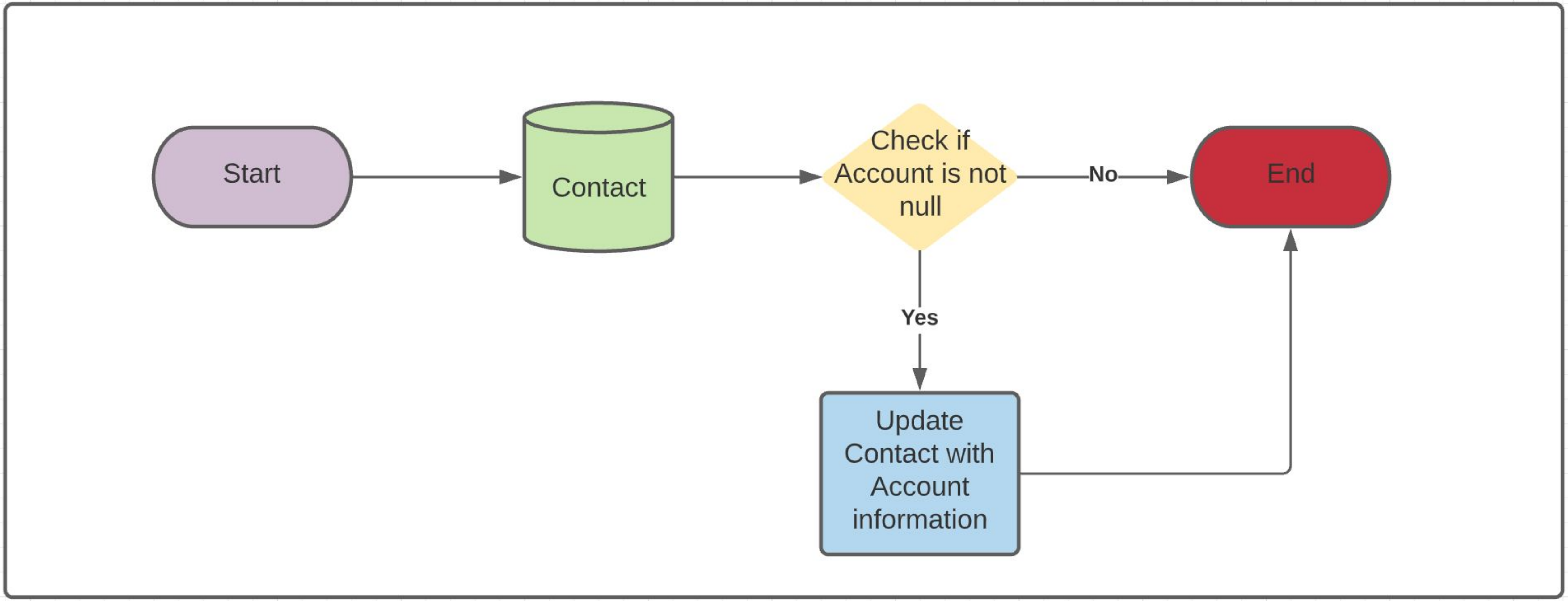
Scenario – Before Save

Develop a flow so that whenever a contact is created, check if Account is not blank. If not blank then populate account Phone, Fax and Mailing address same as Account Phone, Fax and Address



Create Flow
SObject
Do You need to Create, Update, Delete the related record(s)
No
Yes
After Save Flow
Do you want to Send an Email Alert?
Yes
No
Do you want to do Chatter Post?
Yes
Yes
No
Before Save Flow
No
Call Apex Action?

TECHNICAL AMIT



After Save flow

After Save Record Trigger flows are also type of Auto launched Trigger flow. Use After Save Record Trigger Flow when you wanted to do

1. DML on related records
2. Send an Email Alert
3. Make a Callout
4. Call an Action
5. Do the Chatter Post

Scenario – After Save

1. When an account is created, crate a task under the same account with flow details
   - ✔ Subject – Call
   - ✔ Due Date – Todays Date + 7
   - ✔ Description – Account Description
   - ✔ Related To Id account Id
   - ✔ Owner Id – Account Owner Id
2. When the Account is created also post a chatter notification to that account with below information
   - ✔ The Account “Account Name” has been created by “Created By Name” on “Created Date”

Scheduled Trigger Flow

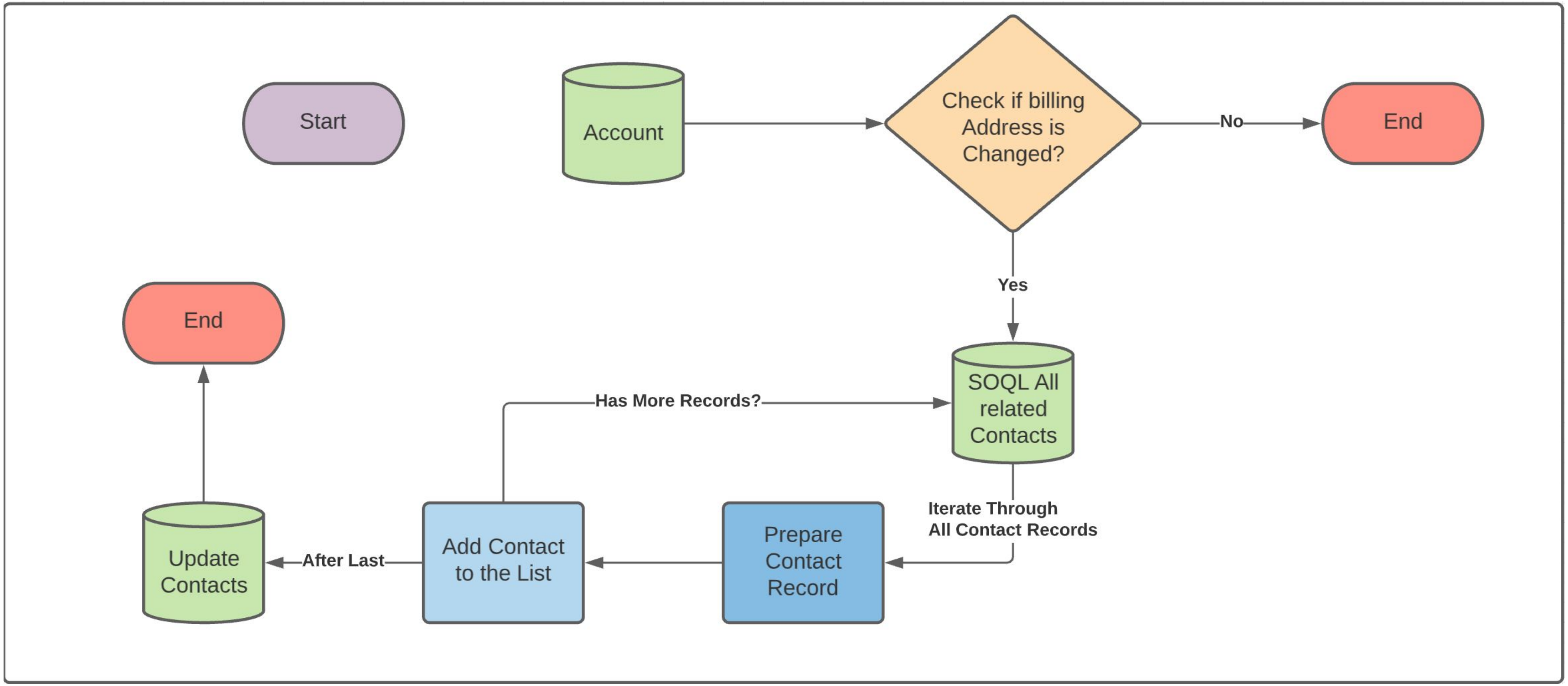
A schedule-triggered flow starts at the specified time and frequency for a batch of records.

For Example, you wanted to run the flow at 12:00 AM every night to update the Account Status to **InActive** if the Account **LastModified** Date is greater that 1 Year.

TECHNICAL AMIT

After Save Flow

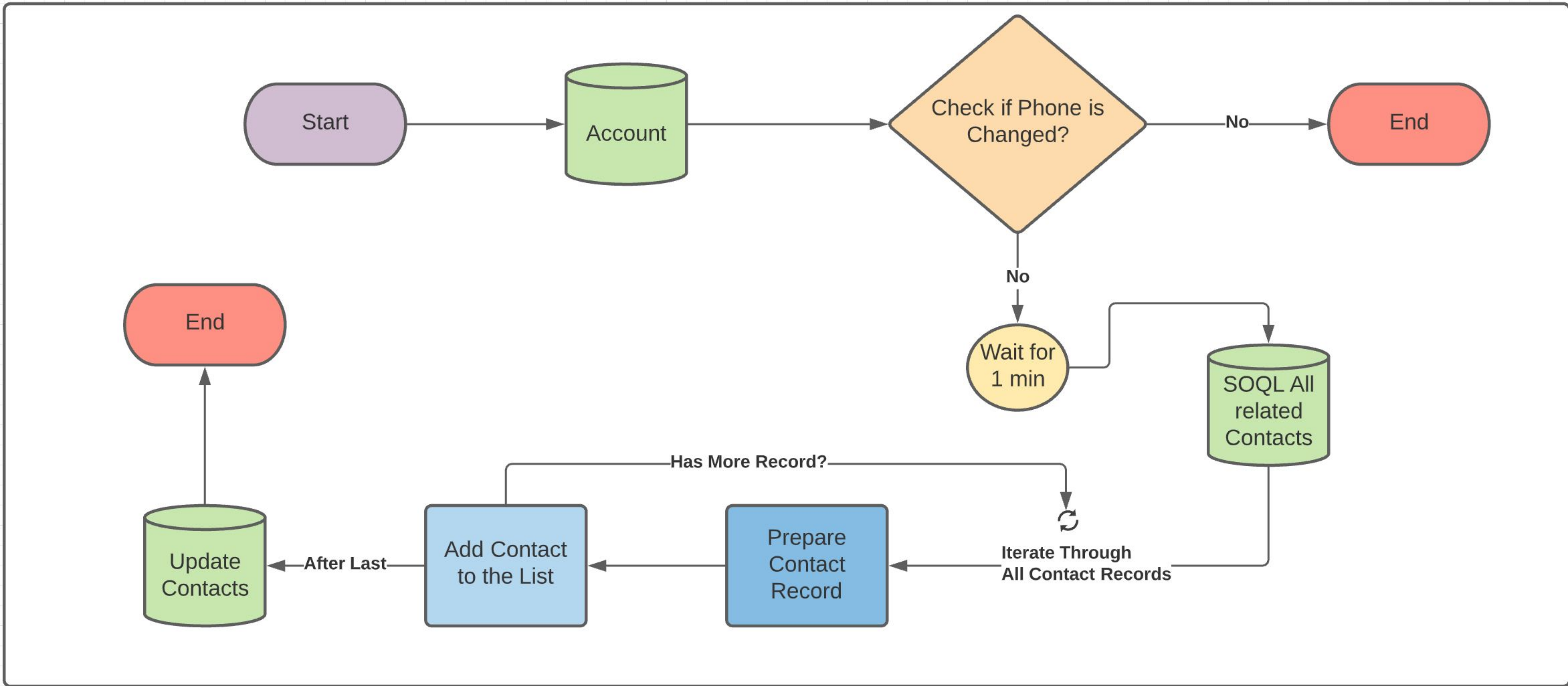
Create a Flow so that whenever the Billing Address/Shipping Address changes on Account Object then update the Mailing Address of All the related Contacts


Start
Account
Check if billing Address is Changed?
No
End
Yes
SOQL All related Contacts
End
Has More Records?
Iterate Through All Contact Records
Update Contacts
After Last
Add Contact to the List
Prepare Contact Record

Time Dependent Flow

Time Dependent Flows are flows which runs after some specified time and perform the actions for what purpose they are designed for

Create a Flow to update the All-Related Contact Phone if the Account Phone is changed using Time-Dependent Flow.


Start
Account
Check if Phone is Changed?
No
End
No
Wait for 1 min
SOQL All related Contacts
Iterate Through All Contact Records
Prepare Contact Record
Add Contact to the List
Has More Record?
After Last
Update Contacts
End

Subflow in Salesforce

Launch another flow that's available in your org.

A flow that is launched by another flow is called the referenced flow.

We usually use sub flows for reusable items. For Example, creating a case from Contact or Account Object we can create a subflow which will have the input to create a case and then call the flow from the parent flow of Contact or Account.

Subflow for RT Flows

Create a Subflow for posting the information to chatter.

Email Template in Salesforce

Use email templates to increase productivity and ensure consistent messaging.

Email templates with merge fields let you quickly send emails that include field data from Salesforce records.

Simple Template

Dear <Customer Name>,

Thank you for shopping with us. Here are your order details and attached is the receipt of the Order Details

Order Details

Amount – <Amount>

Address – <Address>

Products Details - <List of All product Items >

Paid? – <Status>

Order Date –

Estimated Delivery Date –

Thanks ,

XYZ Company

Types

1. Text Email Template
2. Html with letterhead
3. Html without letterhead
4. VisualForce Template

Ways to Create Email Template

1. Classic Email Template
2. Lightning Email Template

Create a Simple Email

Dear <Customer Name>,

Thank you for shopping with us. Here are your order details and attached is the receipt of the Order Details

Order Details

Amount – <Amount>

Address – <Address>

Products Details - <List of All product Items >

Paid? – <Status>

Order Date –

Estimated Delivery Date –

Thanks ,

XYZ Company

Html Email without letterhead

Create an Email template for Student Object which will have static content.

Dear <Student Name>,

Greetings from the **<College Name>** Family!

First, we welcome you to **<College Name> ,** and we are happy to have you on board with us.

There are a few things we would like you to know as you have enrolled with us.

You can also give us a call at our support numbers in case of any emergency. The numbers are: IN: **+91-1234567890** (extn 2) US : **123-215-3530** (Toll Free)

Please refer to this link to know more about **<College Name>** : https://youtu.be/iYUSeV0M

You need to submit the assignments and projects on time as per the schedule at **<College Email>**

We hope you will have a wonderful experience with us, and we will be happy to assist you in the upcoming days.

Happy Learning!

Letter head in Email templates

1. A letterhead consists of properties and details. The properties are only visible inside your organization.
2. They help users identify a letterhead. The details are applied to an email when using that letterhead.
3. Use the letterhead wizard to create both the properties and details of your letterhead.

Create Email Template with Letterhead

Create Letterhead –

Letterheads define the look and feel of your HTML email templates. Your HTML email templates can inherit the logo, color, and text settings from a Letterhead. Below is a list of your organization's Letterheads.

Tip: Create just a single Letterhead for your company. Use this Letterhead as the foundation for all your HTML email templates.

Create Email Template with Letterhead

1. Create Letterhead

Dear <Student Name>,

Greetings from the **<College Name>** Family!

First, we welcome you to **<College Name> ,** and we are happy to have you on board with us.

There are a few things we would like you to know as you have enrolled with us.

You can also give us a call at our support numbers in case of any emergency. The numbers are: IN: **+91-1234567890** (extn 2) US : **123-215-3530** (Toll Free)

Please refer to this link to know more about **<College Name>** : https://youtu.be/iYUSeV0M

You need to submit the assignments and projects on time as per the schedule at **<College Email>**

We hope you will have a wonderful experience with us, and we will be happy to assist you in the upcoming days.

Happy Learning!

Create Lightning Email Template

Dear <Student Name>,

Greetings from the **<College Name>** Family!

First of all, we welcome you to **<College Name> ,** and we are happy to have you on board with us.

There are a few things we would like you to know as you have enrolled with us.

You can also give us a call at our support numbers in case of any emergency. The numbers are: IN: **+91-1234567890** (extn 2) US : **123-215-3530** (Toll Free)

Please refer to this link to know more about **<College Name>** : https://youtu.be/iYUSeV0M

You need to submit the assignments and projects on time as per the schedule at **<College Email>**

We hope you will have a wonderful experience with us, and we will be happy to assist you in the upcoming days.

Happy Learning!

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Email Deliverability in Salesforce

To Send the Email from Salesforce Org we must need to configure the Email Deliverability. Email Deliverability can be one of the following based on the requirement

1. **No access** — Prevents all outbound email to and from users.
2. **System email only**—Allows only automatically generated emails, such as new user and password reset emails.
3. **All email—**Allows all types of outbound email. Default for new, non-sandbox orgs.

Send Email Using Flow

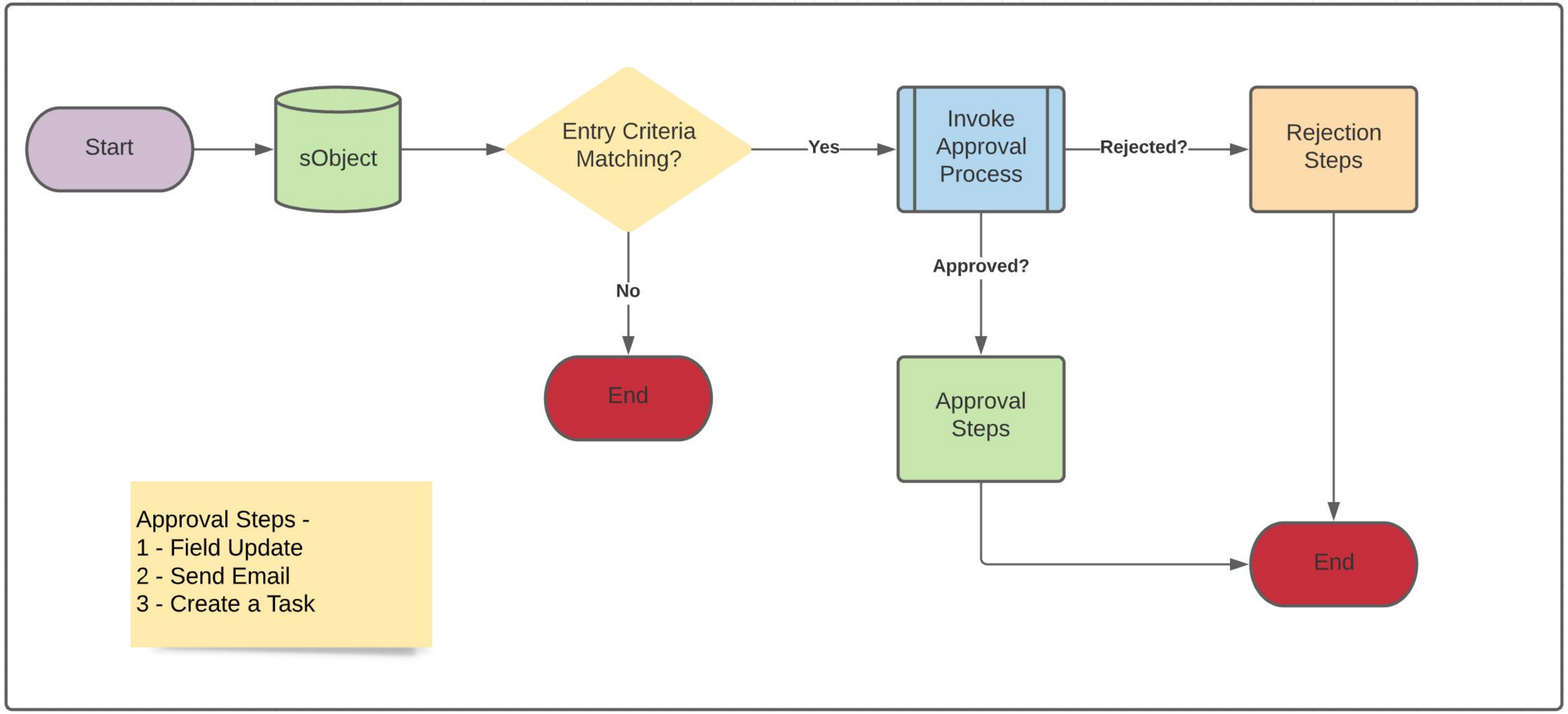
1. Create an Email Alert
2. Create a Flow to Send an Email to Student whenever a new Student is Created under any college

Approval Process in Salesforce

Approval Process is an automation tool which is used to approve a particular record. For Example, John as a Sales Rep wanted to offer some discount to the customer so before offering the discount, discount must be approved by John's Manager.

Important Points –

1. Once the Record is pending for Approval Process only the Admin / Owner can Edit the record
2. Every Approval Process must need to have any entry criteria
3. An Approval process can have multiple steps
4. Every step of approval process may or may not have actions
5. Every Approval process must need to have Initial, Final Approval and Final Rejection actions



Start
sObject
Entry Criteria Matching?
Yes
No
End
Invoke Approval Process
Rejected?
Rejection Steps
Approved?
Approval Steps
End
Approval Steps -
1 - Field Update
2 - Send Email
3 - Create a Task

Create Email Templates for Opportunity Approval

Email Notification to Approver when record will be submitted for Approval

Subject - <Opportunity Name> was submitted for Approval

Content – Dear <user name >

<Owner Name> has requested your approval for the following item.

Opportunity Name –

Close Date –

Amount

To approve or reject this item, reply to this email with the word APPROVE, APPROVED, YES, REJECT, REJECTED, or NO in the first line of the email message, or click this link:

<approval link>

If replying via email you can also add comments on the second line. The comments will be stored with the approval request in Salesforce CRM.

Thanks & Regards,

XYZ Inc

Create Email Templates for Opportunity Approval

Create Email template for approval of the record when the record is approved and will be sent to Opportunity Owner.

Subject - <Opportunity Name> Approved

Content – Dear <Owner Name>,

Hurray your discount <discount %> for requested item <Opportunity Name> was approved.

Thanks & Regards,

XYZ Inc.

Create Email Templates for Opportunity Approval

Create Email template for rejections of the record when the record is approved and will be sent to Opportunity Owner.

Subject - <Opportunity Name> Rejected!!

Content – Dear <Owner Name>,

Unfortunately, your discount <discount %> for requested item <Opportunity Name> was rejected.

Rejected Reason - <Reason Here>

Thanks & Regards,

XYZ Inc.

Create a Simple Approval Process

Create an Approval Process for Opportunity if the discount is greater than 5%. Send the Email notification to the user manager to approve/reject record.

1. Create a Custom Field on Opportunity Approval Status (Not Approved / Approval Pending / Approved / Rejected /)
2. Create a Custom field Reject Reason (Text Area)
3. Select Fields to Display on Approval Page Layout add following fields
    1. Name
    2. Account
    3. Amount
    4. Close Date
    5. Description
    6. Reject Reason
4. Only Record Owner Can submit the record for approval
5. For Email Template Select the Email Template Created in Previous Step

Process Definition Detail

Edit ▼ Clone Delete

Process Name	Case Approval Process	Active	
Unique Name	Case_Approval_Process	Next Automated Approver Determined By	Manager of Record Submitter
Description			
Entry Criteria	Case: SLA Violation EQUALS Yes		
Record Editability	Administrator **OR** Current Approver	Allow Submitters to Recall Approval Requests	✓
Approval Assignment Email Template	Case Approval Template		
Initial Submitters	Case Owner		
Created By	Admin User, 17/01/2022, 8:46 pm	Modified By	Admin User, 17/01/2022, 8:46 pm

Initial Submission Actions

Add Existing Add New ▼

Action	Type	Description
	Record Lock	Lock the record from being edited

Approval Steps

New Approval Step

You have not yet defined any approval steps

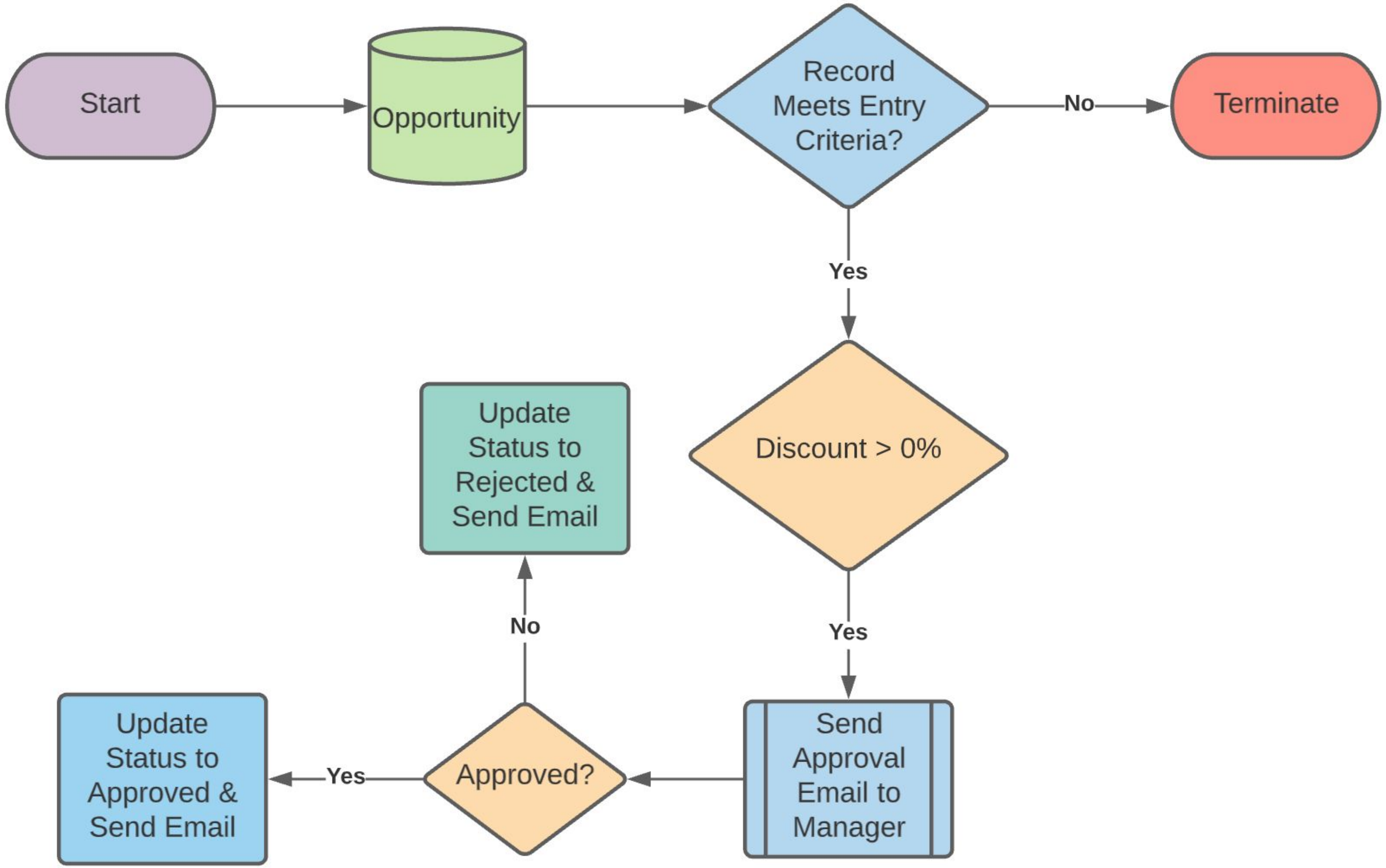
Final Approval Actions

Add Existing Add New ▼

Action	Type	Description
Edit	Record Lock	Lock the record from being edited

Final Rejection Actions

Add Existing Add New ▼


Start
Opportunity
Record Meets Entry Criteria?
No
Terminate
Yes
Discount > 0%
Yes
Send Approval Email to Manager
Approved?
Yes
Update Status to Approved & Send Email
No
Update Status to Rejected & Send Email

Create a Simple Approval Process

1. Initial Action must be a field update which will set approval status to Approval Pending
2. Final Approval action must be a field update which will update the Approval Status to Approved
3. Final Rejection action must be a field update which will update the Approval Status to Rejected
4. Test the Approval Process

Approve Record Using Email

1. Enable Setting
2. Test Approval Process

Multi-Step Approval Process

Multi-Step approval process is the advanced level of approval process where it will have multiple approvers. The next level of approver will get email only when the lower level of approver has approved the record.

For Example,

- Records enters entry criteria
- Approver 1 approves then
- Approver 2 approves after approver 1 has approved then
- Approver 3 approves after approver 2 has approved.
- Finalize.

Requirement

Develop an Approval process to approve the discount of an Opportunity Record based on the below criteria

1. Discount is between 2-4% then Only Manager Approval Needed
2. Discount is between 4-6% then approval from both Manager and VP is needed
3. Discount is less than 2% Approve the record automatically

Implementation

1. Add new values in the Approval Status Picklist field (VP Approval Pending, CEO Approval Pending)
2. Email Template will be used from the previous Lectures
3. Start Developing a New Process

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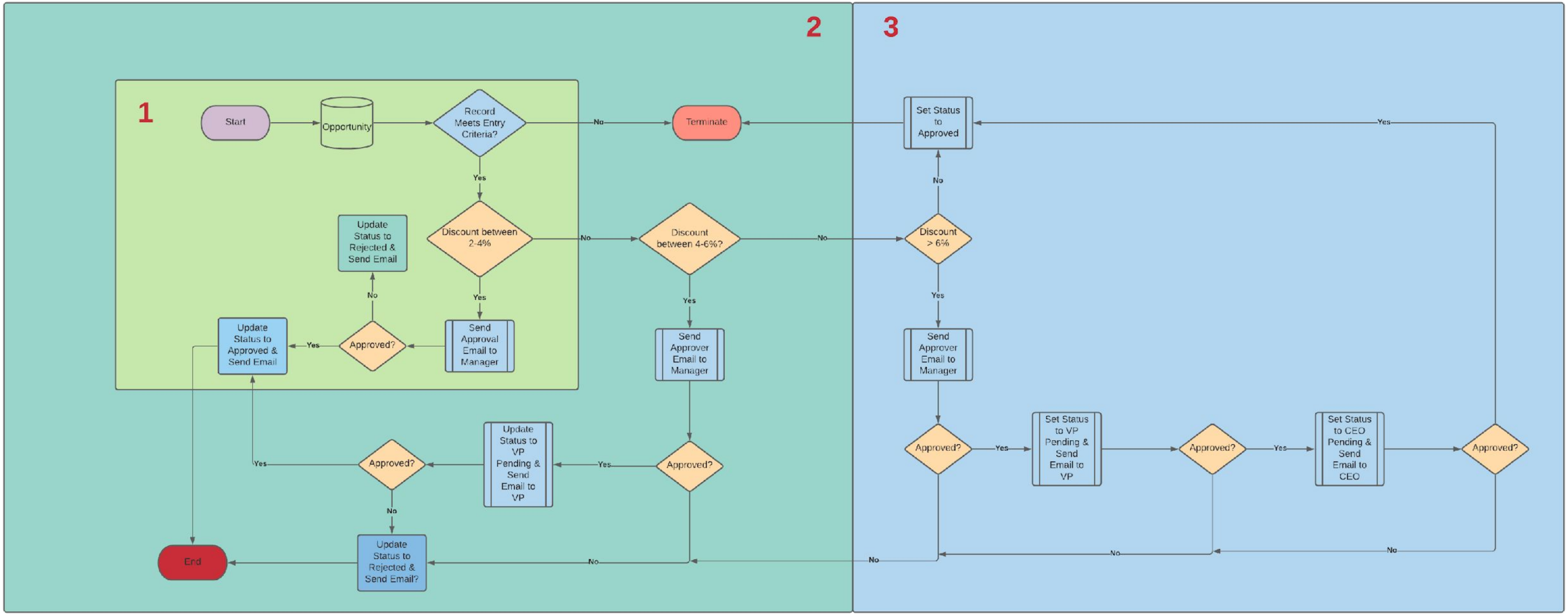


Invoke approval process from Flow

Case Management in Salesforce

1. Case management in Salesforce is the process to manage the whole Case life cycle.
2. Cases are the inquiries/issues that your customers are facing.
3. Case can come to salesforce from various resources like Email, Web, Live Chat, Phone & etc.
4. For Example, support@yourdomain.com , www.yourdomain.com/contact-us, live chat on web, call us at +91-1234567890
5. In Salesforce, there are service console applications which are useful to manage the whole lifecycle of Cases
6. To manage the different type of cases, we need to create support process in Salesforce.

Support Process in Salesforce

1. Support processes are all processes whose sole purpose is to ensure the functioning of key processes and overall operations of the company. Security Management. Process Management. Risk Management.
2. Support process are required to create the record types for Case Object.
3. With the help of support process, we can control the Case Status picklist values

Queues in Salesforce

1. Queue is consist of Users which is used to share the workload between the team members
2. Queue is the owner of a record which is not assigned to any user
3. Queue can be a record owner (users those are part of queue can assign the record to themselves)
4. Queue will always be setup for an Object
5. Not All object can have the queues

Exercise

Create following queues for case object

1. Hight Priority Cases
2. Low Priority Cases
3. Medium Priority Case

Groups in Salesforce

- A group consists of a set of users. A group can contain individual users, other groups, or the users in a particular role
- Group is used to share the records with the members it contains
- Group can never be the owner of a record

You can use groups in the following ways.

- To set up default sharing access via a sharing rule
- To share your records with other users

Exercise

Create Following Groups in Salesforce

1. EMEA Group
2. APAC Group
3. AMER Group

Web to Case in Salesforce

W2C enables the business to capture the cases directly from their website.

Setting up a web form looks like this:

- Set your case submission preferences in Setup.
- Decide which case fields to include in your form—for example, Contact Name, Phone, or a custom field.
- Use our handy tool to generate the form in HTML.
- Add the HTML to your website to make the form visible to customers.

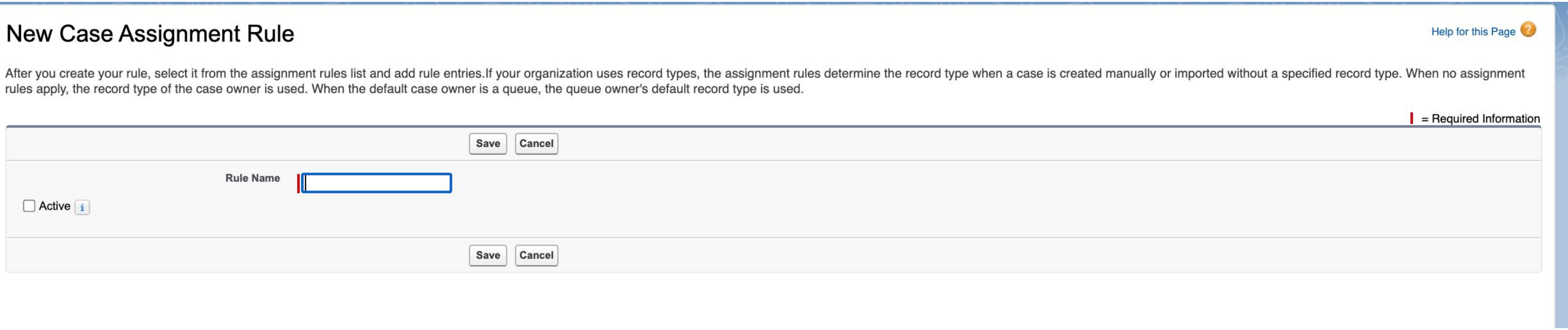
With a Web-to-Case form, you can generate up to 5,000 cases per day.

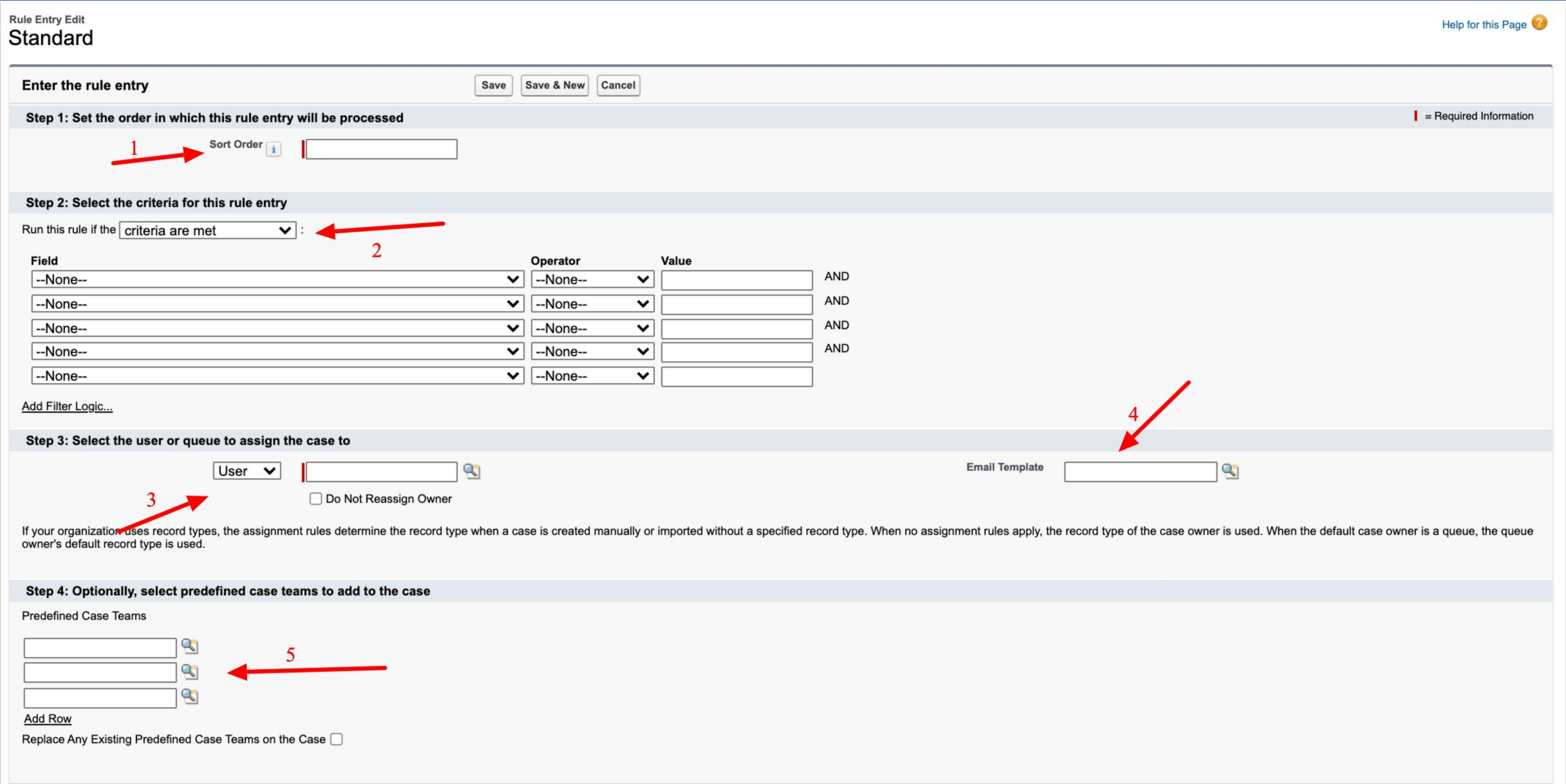
You can also add reCAPTCHA v2 to your web form to filter out spam cases.

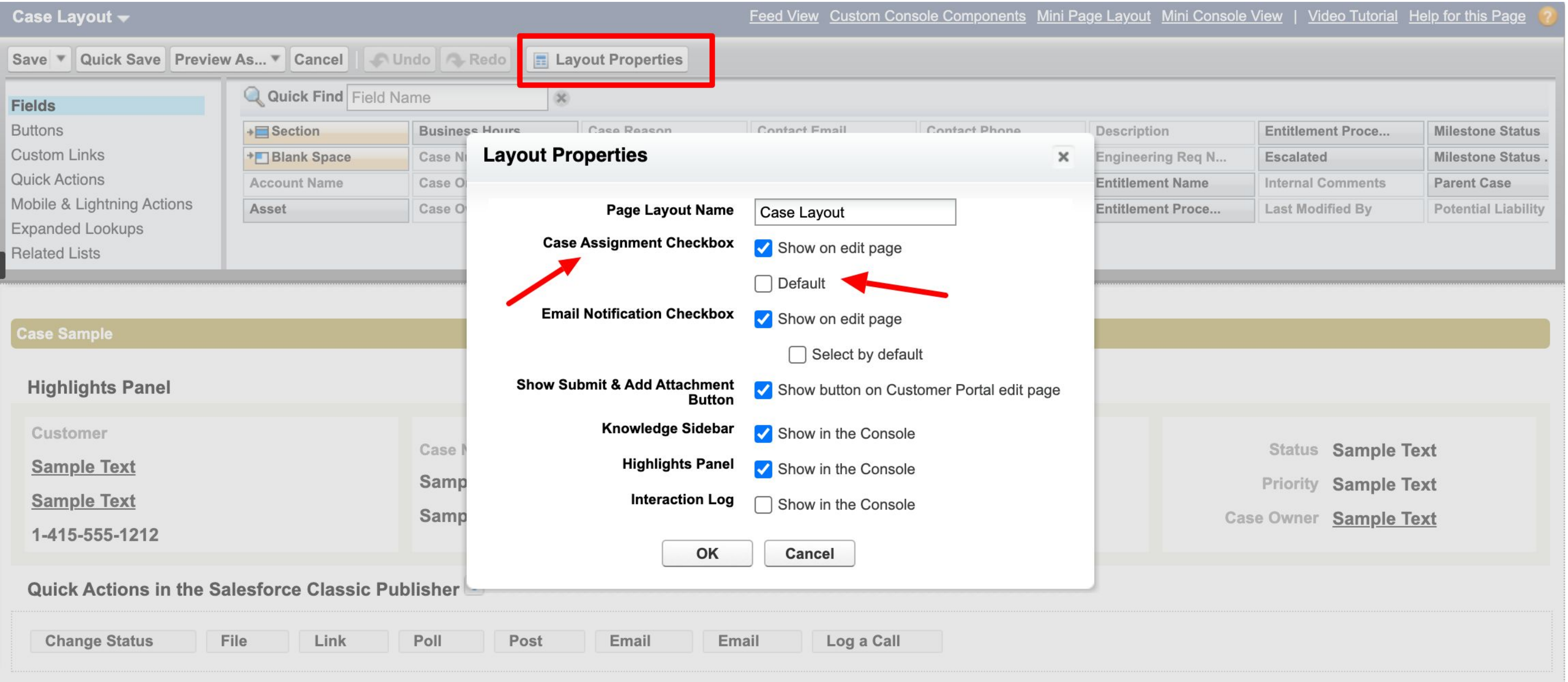
Case Assignment Rule in Salesforce

1. Case Assignment rules automate your organization's support processes.
2. Use case assignment rules to specify how cases are assigned to users or queues
3. Case assignment rules can assign cases regardless of how cases are created. Cases can be created manually or automatically using Web-to-Case, Email-to-Case, On-Demand Email-to-Case, the Self-Service portal, the Customer Portal, Outlook.
4. There can be only 1 Case Assignment rule active at a time but can have multiple entries inside a single assignment rule

Case Assignment Rule in Salesforce




Rule Entry Edit
Standard
Help for this Page
Enter the rule entry
Save
Save & New
Cancel
Step 1: Set the order in which this rule entry will be processed
= Required Information
1
Sort Order
Step 2: Select the criteria for this rule entry
Run this rule if the criteria are met :
2
Field
Operator
Value
--None--
AND
Add Filter Logic...
4
Step 3: Select the user or queue to assign the case to
User
Email Template
3
Do Not Reassign Owner
If your organization uses record types, the assignment rules determine the record type when a case is created manually or imported without a specified record type. When no assignment rules apply, the record type of the case owner is used. When the default case owner is a queue, the queue owner's default record type is used.
Step 4: Optionally, select predefined case teams to add to the case
Predefined Case Teams
5
Add Row
Replace Any Existing Predefined Case Teams on the Case


Case Layout
Feed View
Custom Console Components
Mini Page Layout
Mini Console View
Video Tutorial
Help for this Page
Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Fields
Buttons
Custom Links
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Quick Find
Field Name
Section
Blank Space
Account Name
Asset
Business Hours
Description
Engineering Req N...
Entitlement Name
Entitlement Proce...
Escalated
Internal Comments
Last Modified By
Milestone Status
Parent Case
Potential Liability
Case Sample
Highlights Panel
Customer
Sample Text
Sample Text
1-415-555-1212
Status
Priority
Case Owner
Quick Actions in the Salesforce Classic Publisher
Change Status
File
Link
Poll
Post
Email
Email
Log a Call
Layout Properties
Page Layout Name
Case Layout
Case Assignment Checkbox
Show on edit page
Default
Email Notification Checkbox
Show on edit page
Select by default
Show Submit & Add Attachment Button
Show button on Customer Portal edit page
Knowledge Sidebar
Show in the Console
Highlights Panel
Show in the Console
Interaction Log
Show in the Console
OK
Cancel

Case Auto-Response rule in Salesforce

Auto-response rules let you automatically send email responses to lead or case submissions based on the record's attributes. For example, you can send an automatic reply to customers to let them know someone at your company received their inquiry

There can be only 1 Auto-Response Rule active at a time and can have multiple steps

Create auto-response rules for Cases submitted through a

- Self-Service portal
- Customer Portal
- Web-to-Case form
- Email-to-Case message
- On-Demand Email-to-Case message

Case Auto-Response rule in Salesforce

Sample Case Auto-Response Rule

Enter the rule entry Save | Save & New | Cancel

Step 1: Set the order in which this rule entry will be processed

= Required Information

Sort Order [ ]

Step 2: Select the criteria for this rule entry

Run this rule if the [criteria are met] :

Field	Operator	Value	
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Add Filter Logic...

Step 3: Specify the name and address to include on the auto-response message From line

Name [ ]

Email Address [ ]

The sender email address must be either one of your verified organization-wide email addresses or the email address in your Salesforce user profile. It must also be different from your Email-to-Case routing addresses.

Reply-to Address [ ]

Step 4: Select the template to use

Email Template [ ]

Step 5: Specify whether to copy all To and Cc recipients on the response

Send response to all recipients [ ]

Step 6: Select a survey to send (Optional)

Survey [ ]

Send a survey to the case contact when the auto-response rules are met. You must have Surveys enabled.

Email to Case Salesforce

When customers send messages to your support email addresses, Salesforce automatically creates cases and auto-populates case fields.

For Example, customer sends an email to sfdcpanther@gmail.com and then the case will be created inside salesforce.

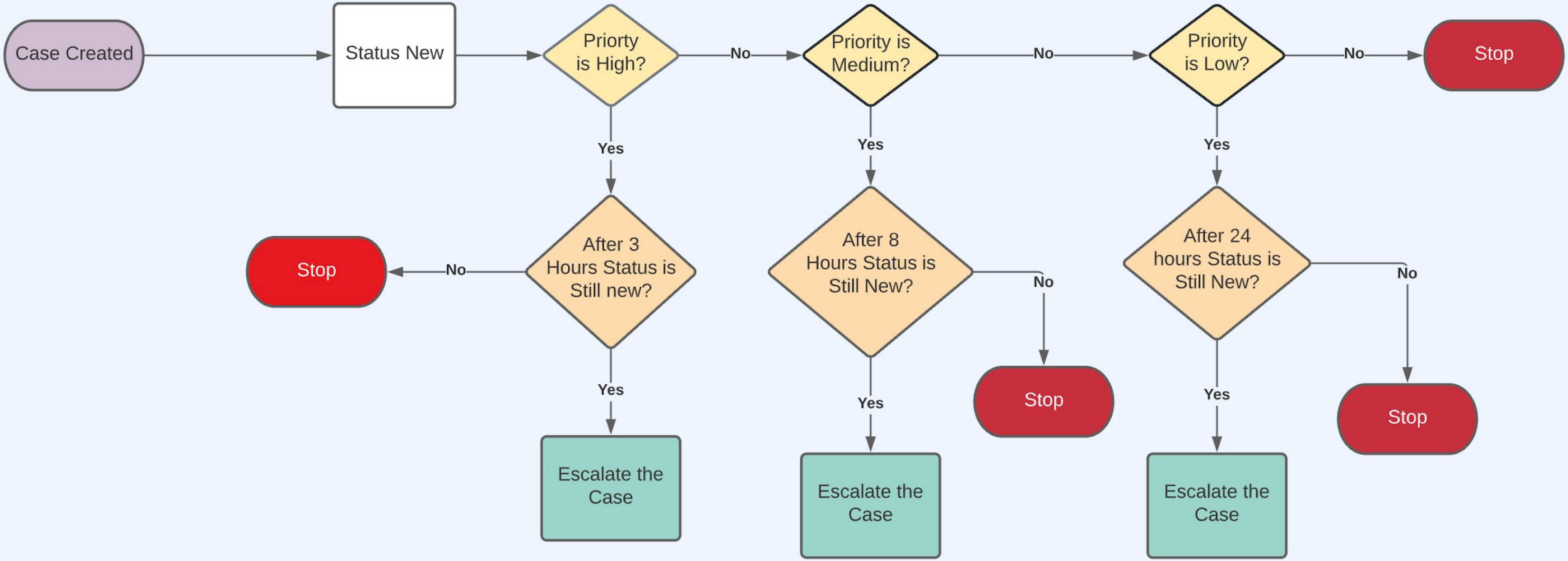
1. Enable Email to Case
2. Setup Email to Case
3. Test Email to Case

Case Escalation Rule in Salesforce

1. Escalation rules are used to automatically escalate cases when the case meets the criteria defined in the rule entry. For Example, if a case a high priority case is not solved within 3 hours case can be escalated to tier 2 agents from tier1 agents.
2. **1 Escalation Rule can be active at a time but can have multiple rule entries**

Priority	SLA (in hours)	Initial Owner	Escalated Owner	L2 Escalated Owner
High	3	Tier 1 Agents	Tier 2 Agents	Tier 2 Agents
Medium	8	Tier 1 Agents	Tier 2 Agents	Tier 2 Agents
Low	24	Tier 1 Agents	Tier 2 Agents	Tier 2 Agents

Case Escalation Rules in Salesforce



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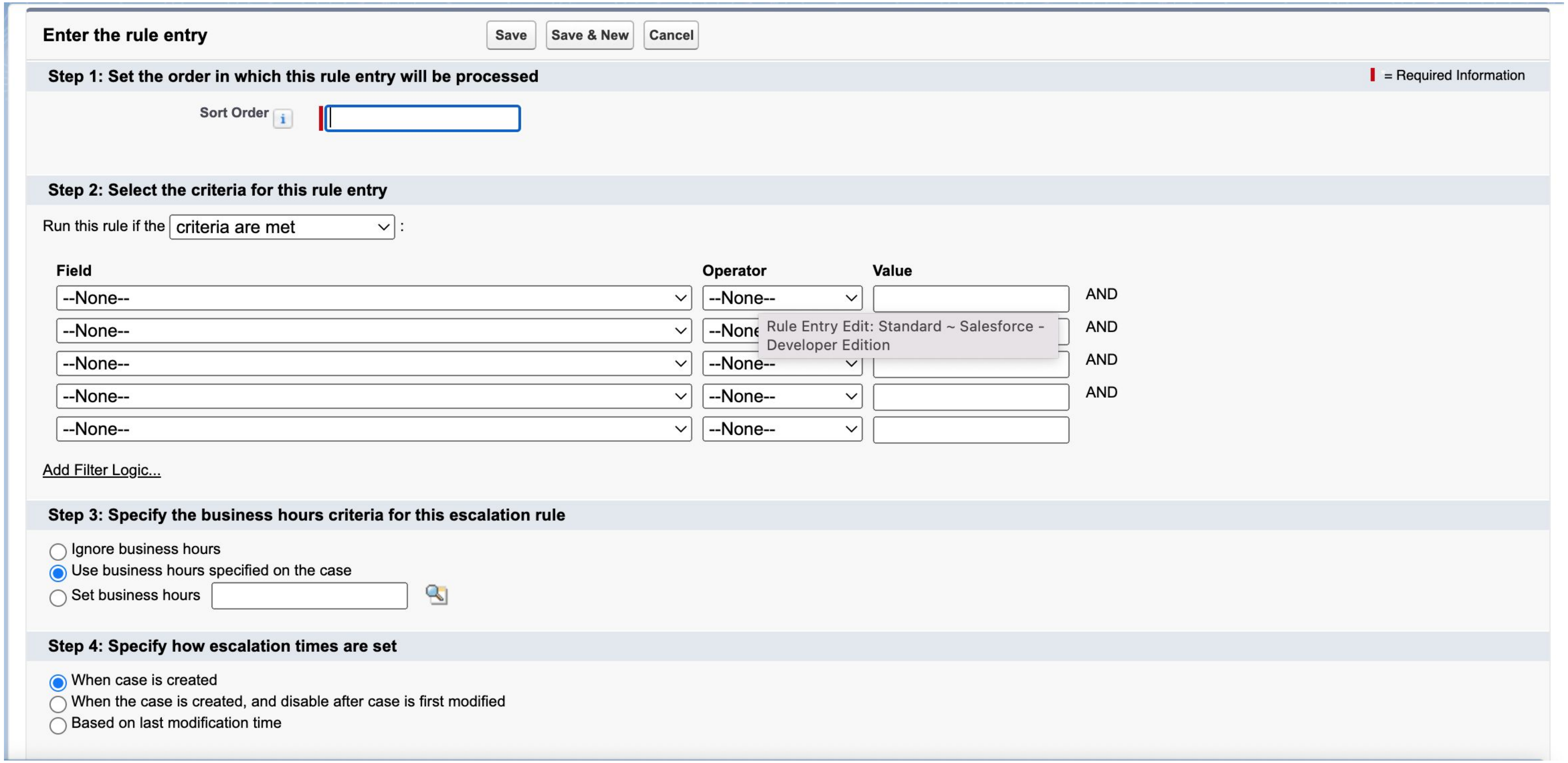
Create Escalation Rule

Create Escalation Rule



How business hours works on Case Escalation Rules

Business hours are set 9:00 AM to 6:00 PM

1. Case is created at 4:00 PM then total hours will be 2 as business hours ends at 6:00 PM
2. Case is created at 5:00 PM then total hours will be 1 as business hours ends at 6:00 PM
3. Case is created at 12:00 PM then total hours will be 6 as business hours ends at 6:00 PM

Create Escalation Rule

Rule Entry Edit

Standard

Help for this Page

Edit this rule entries' details or add a new action to take when this entries' details and criteria is met.

Enter the rule entry

Edit | Cancel

Rule Name	Standard
Order	1
Rule Criteria	(Account: Billing Country EQUALS US,USA,United States,United States of America) AND (Account: SLA EQUALS Platinum) AND (Case: Priority EQUALS High)
Business Hours Settings	Use business hours specified on the case
How escalation times are set	When case is created

Edit | Cancel

Escalation Actions

New

Escalation Actions Help

Action	Escalate At	Assign To	Email	Notify	Template
Edit | Del	2 Hours and 0 Minutes	Admin User	✓	Admin User	Support: Escalated Case Notification

Create Escalation Rule

ESCALATED CASE 00001039 Inbox ×

Admin User

to amitsinghsfmc@gmail.com

10:30 (0 minutes ago)

The following case has been escalated to the Escalated Queue.

Company: United Oil & Gas Corp.
Service Level:
Product: GC3060
Case #: 00001039
Case Subject: Seeking guidance on electrical wiring installation for GC5060

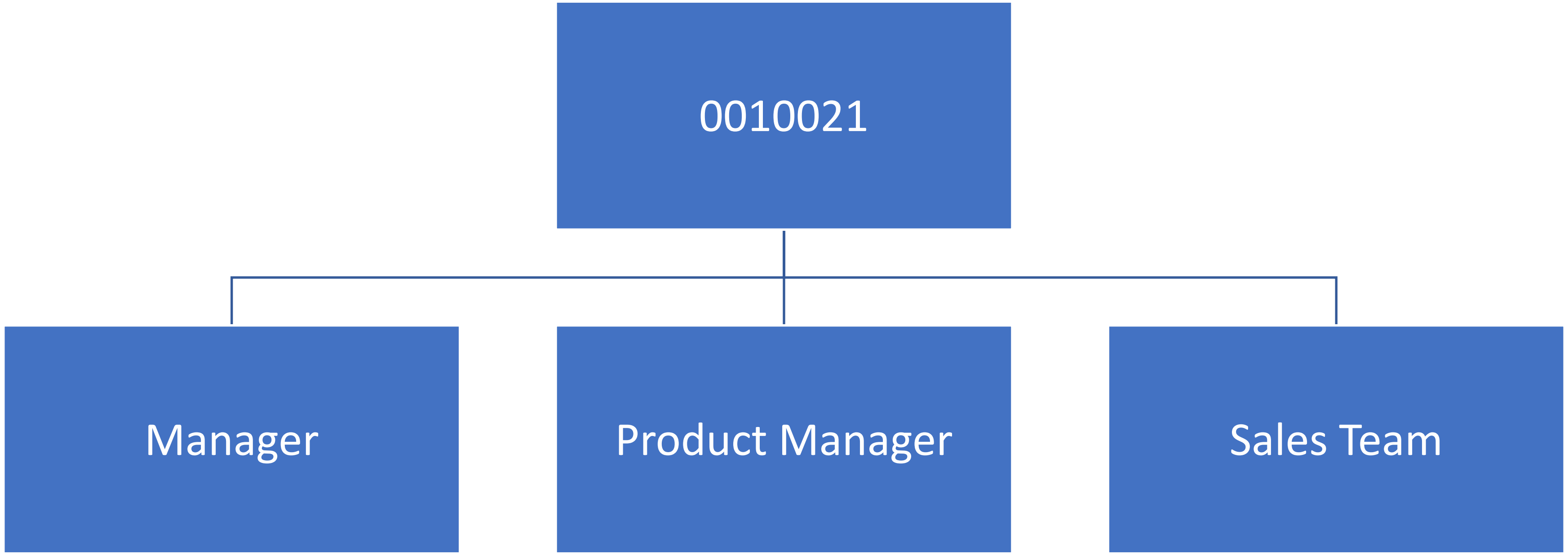
Case Team

A case team is a collection of people who work together in order to solve a case. For example, a case team can include support agents, support managers, and product managers.

Case Team Role - Before you set up case teams or predefined case teams, create roles to determine team members level of access to cases.

Predefined Case Teams – We can create a team of people who frequently work together to solve the similar kind of cases. For Example, Installation Team, Transaction Management Team, & etc.

Case Team



Exercise

1. Add Case Team Roles
   1. Product Manager
   2. Support Agents
   3. Sales Team
2. Add Pre-Defined Team
   1. Platinum Support Team
   2. Installation Team
3. Add Teams under a Case

Activity Management in Salesforce

1. Task
2. Event
3. Calendars

Activity Management Salesforce

1. Activities include tasks, events, and calendars.
2. In Salesforce, we can track tasks and meetings together in lists and reports to easily prioritize your time and keep up with your accounts, campaigns, contacts, leads, and opportunities.

Note: - To work with actives for custom object you must need to enable it

Task –

1. Keep your to-do list in Salesforce and stay right on top of your deals and accounts.
2. We can easily task to any standard and custom object like Account, Contact, Lead, Opportunity, Student & etc
3. Every task has a due date
4. We can create recurring tasks as well which will occur on some intervals like logging the Time Sheet

WhoId & WhatId

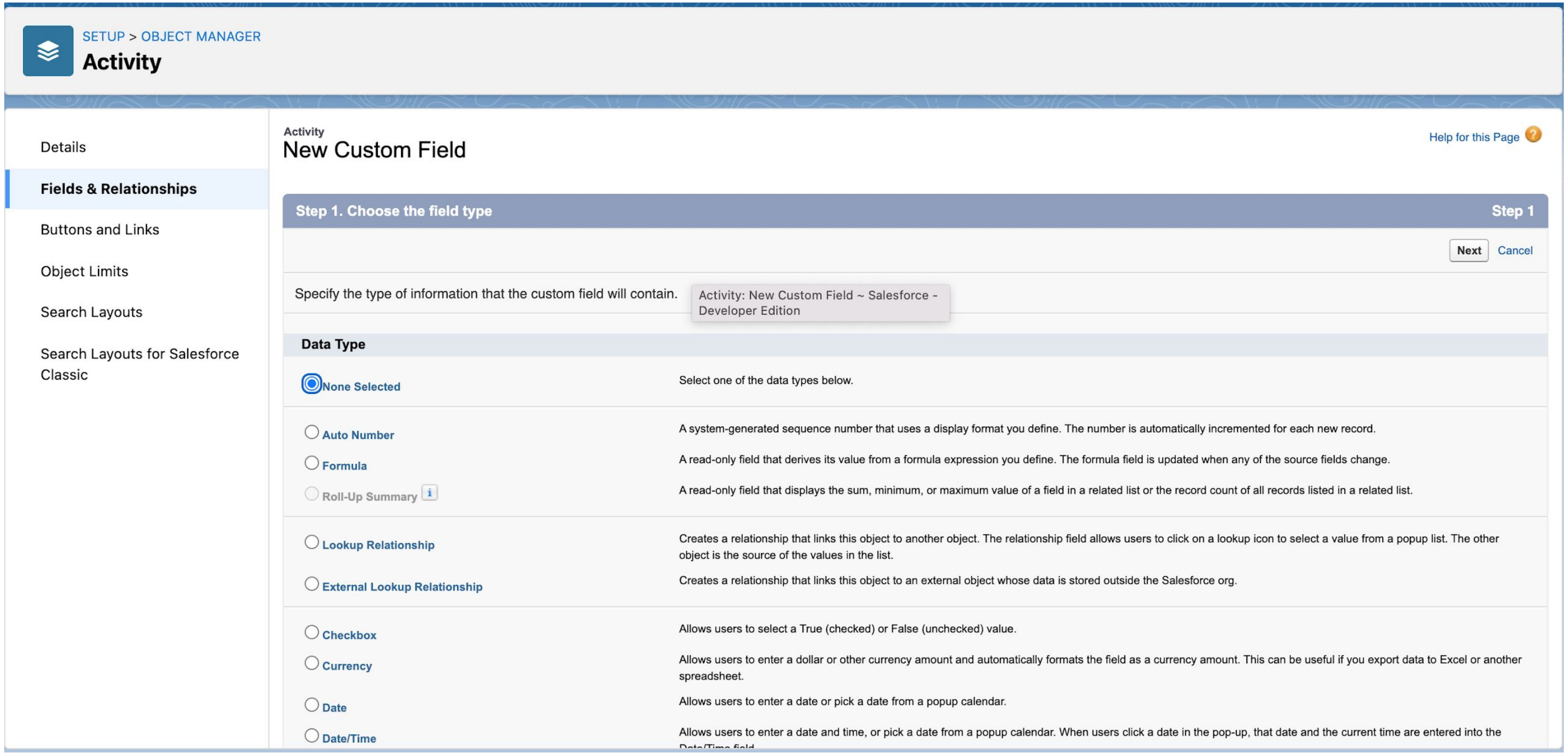
1. WhoId (Name) – Who id can only be of type Contact & Lead
2. WhatId (Related To) – What Id can be of any standard or custom object except Lead & Contact

Activity Management Salesforce

Events & Calendars

1. Events & Calendars are used to to track meetings with customers, prospects, and colleagues
2. We can easily event to any standard and custom object like Account, Contact, Lead, Opportunity, Student & etc
3. Every event must have start and end date
4. We can create recurring events like daily team meetings

Create Custom Field for task & event



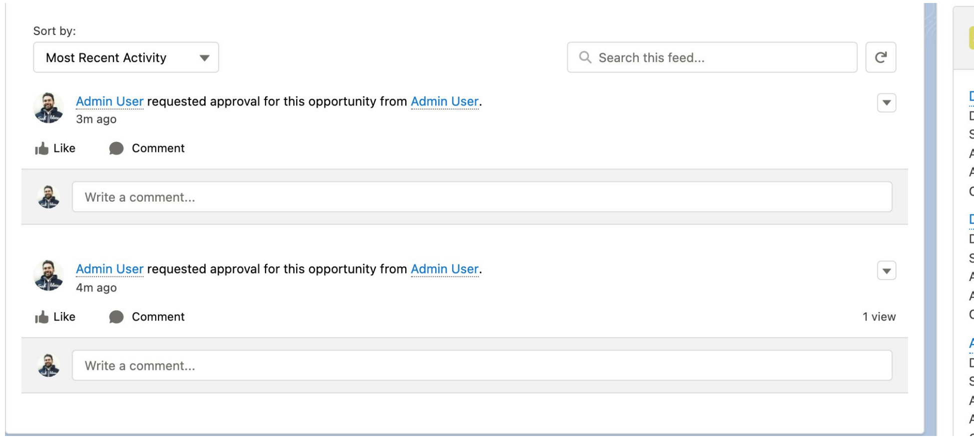
Chatter Management

1. Chatter Feed
2. Collaboration Group

Chatter Feed

Chatter is mainly used to collaboration inside Salesforce Org.

Follow people and records to see updates about them in Chatter



Typically, following lets you see updates about:

- Feed comments and posts
- Posts, comments, and files on Chatter groups that you're a member of
- Shared files and links
- Tasks and events
- Converted leads
- Record field changes, like changes to record owner and closed opportunities and cases

Note – To Use Chatter for custom object you need to enable the feed tracking from setup

Chatter Feed

Important Points

1. You can setup out of office email in chatter
2. Record can be approved from chatter
3. You can invite your coworkers to use chatter
4. You can add your customers to the groups that you own

Assignment

1. Enable the Feed Tracking for the following objects
   - College
   - Student
   - Subject
   - Rating
   - University
2. Setup Out of Office for Your User Record.
3. Approve an Opportunity record from Chatter Post

Collaboration Group

1. Chatter is a Salesforce real-time collaboration application that lets your users work together, talk to each other, and share information.
2. One of the most useful communication tools in Chatter is *following*. You can follow people, groups, topics, files, and records, like opportunities and accounts.

Types of Groups

1. Public
2. Private
3. Unlisted
4. Groups with Customers

Collaboration Group

You can join up to 300 groups, and your company can have a total of 30,000 groups. Chatter groups can be public, private, unlisted, and archived.

The group can be of type

- Support Group
- Teams Group
- Project Group
- Groups for adding the record - https://automationchampion.com/2020/12/03/automatically-add-records-to-chatter-group/
- etc

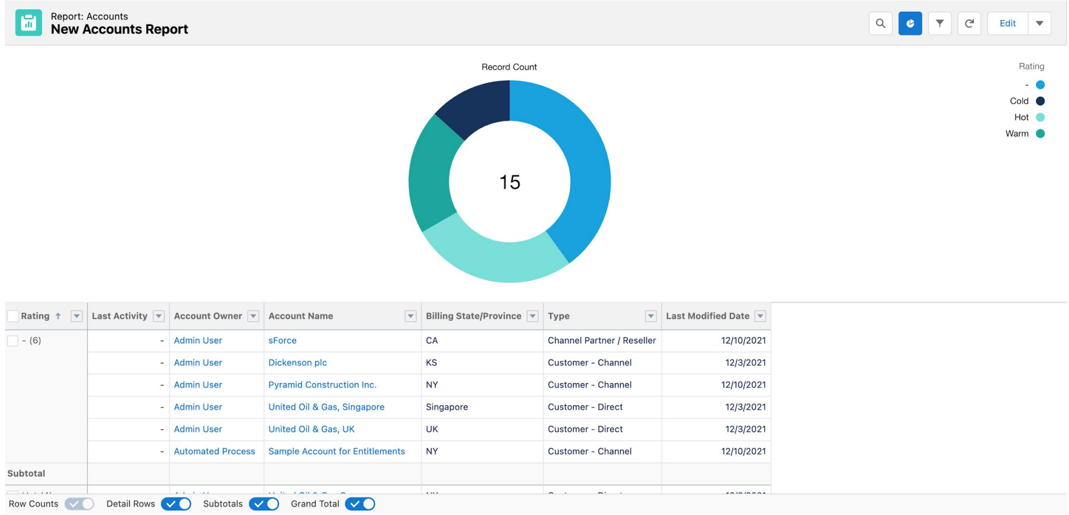
Assignment

Create the Private Chatter Group for the Different Different Course Your College Offers.

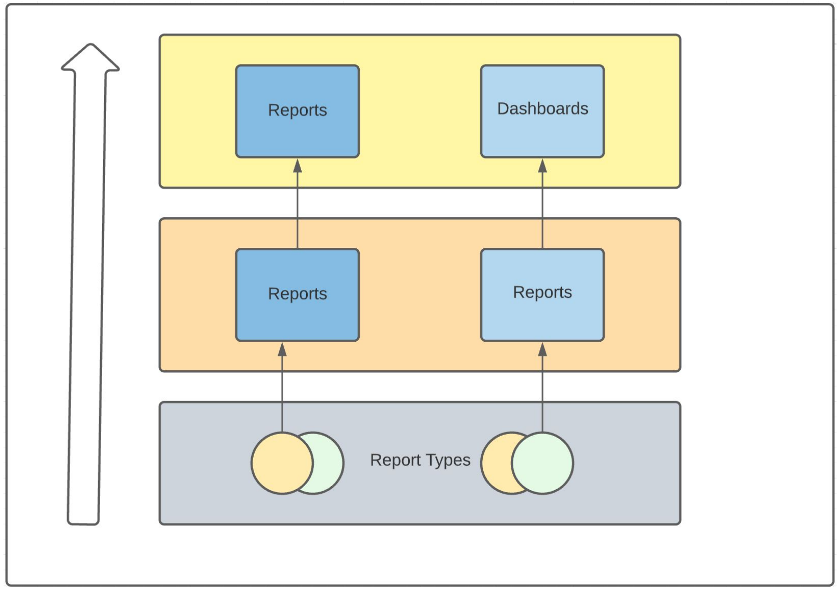
1. CSE
2. IT
3. ECE
4. CE
5. & More

Reports in Salesforce

1. A report is a list of records that meet the criteria you define. It’s displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart.
2. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.
3. You control who has access to the contents of the folder based on roles, permissions, public groups, and license types.

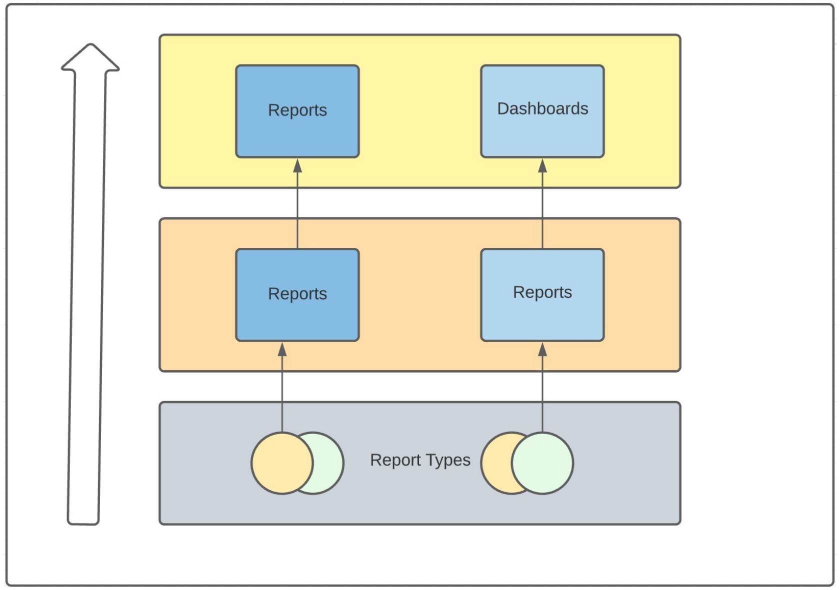


Rating	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Last Modified Date
- (6)	-	Admin User	sForce	CA	Channel Partner / Reseller	12/10/2021
	-	Admin User	Dickenson plc	KS	Customer - Channel	12/3/2021
	-	Admin User	Pyramid Construction Inc.	NY	Customer - Channel	12/10/2021
	-	Admin User	United Oil & Gas, Singapore	Singapore	Customer - Direct	12/3/2021
	-	Admin User	United Oil & Gas, UK	UK	Customer - Direct	12/3/2021
	-	Automated Process	Sample Account for Entitlements	NY	Customer - Channel	12/10/2021
Subtotal						



What is a report type?

1. A report type is like a template which makes reporting easier.
2. The report type determines which fields and records are available for use when creating a report
3. The fields and records on Report Type are controlled by primary and related objects
4. There are standard report types available, but we can also create custom report types



Types of Report in Salesforce

There are mainly 4 types of reports in Salesforce.

1. **Tabular Reports -** Tabular Reports are the most simple type of Salesforce Report. They show your data in rows and are most effective when your goal is to export it.
2. **Summary Report -** Summary Reports in Salesforce are the most commonly used reports and are designed to show groups of data.
3. **Matrix Reports -** Matrix Reports are a step more complicated than Tabular Reports where they can show data in rows and columns.
4. **Joined Reports -** Joined Reports in Salesforce give you the ability to create two separate reports and compare their individual data.

Exercise

Tabular Reports - Tabular Reports are the most simple type of Salesforce Report. They show your data in rows and are most effective when your goal is to export it.

1. Create a report which will show the top 10 accounts based on the annual revenue
2. Export the report

Exercise

Summary Report - Summary Reports in Salesforce are the most commonly used reports and are designed to show groups of data. For example, you wanted to see how many account records are there for every industry and also wanted to add some charts in the report.

1. Create a report which will display all the accounts by industry and also add a donut chart

Matrix Reports

Matrix Reports - Matrix Reports are a step more complicated than Tabular & Summary Reports where they can show data in rows and columns. We can group the data by both rows and columns.

Example - You wanted to get the data for the combination of Account Industry and Rating. Like how many records are there of Education Industry and Hot Rating, Education Industry and Cold Rating, & etc

Assignment

Create the following Reports

- Create a report which will display all the open cases
- Create a report which will display all the closed cases
- Create a report to display the cases by account & add the chart
- Create a report to display the cases by Status & add the chart
- Create a report to display the cases by account & status.

Joined Reports

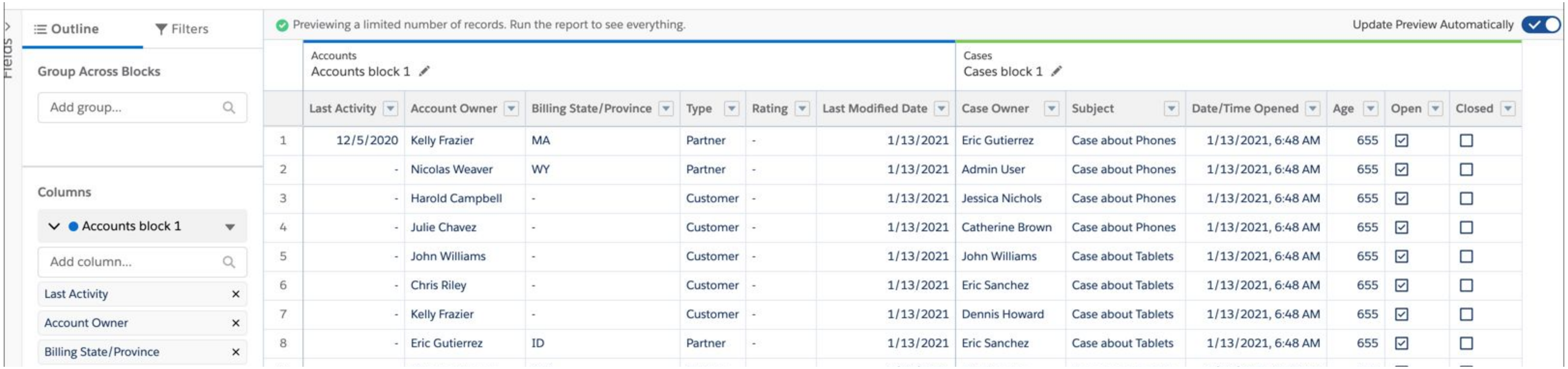
Joined Reports - Joined Reports in Salesforce give you the ability to create two separate reports and compare their individual data.

A joined report consists of up to five report blocks, which you add to the report to create multiple views of your data.

To Add the block in the Joined Report the additional report type must need to have a common relationship with principal report type. The principal report type is the first report type which was added.

Exercise

Create a Joined Reports which shows the Accounts with Cases.



	Accounts Accounts block 1						Cases Cases block 1					
	Last Activity	Account Owner	Billing State/Province	Type	Rating	Last Modified Date	Case Owner	Subject	Date/Time Opened	Age	Open	Closed
1	12/5/2020	Kelly Frazier	MA	Partner	-	1/13/2021	Eric Gutierrez	Case about Phones	1/13/2021, 6:48 AM	655	☑	☐
2	-	Nicolas Weaver	WY	Partner	-	1/13/2021	Admin User	Case about Phones	1/13/2021, 6:48 AM	655	☑	☐
3	-	Harold Campbell	-	Customer	-	1/13/2021	Jessica Nichols	Case about Phones	1/13/2021, 6:48 AM	655	☑	☐
4	-	Julie Chavez	-	Customer	-	1/13/2021	Catherine Brown	Case about Phones	1/13/2021, 6:48 AM	655	☑	☐
5	-	John Williams	-	Customer	-	1/13/2021	John Williams	Case about Tablets	1/13/2021, 6:48 AM	655	☑	☐
6	-	Chris Riley	-	Customer	-	1/13/2021	Eric Sanchez	Case about Tablets	1/13/2021, 6:48 AM	655	☑	☐
7	-	Kelly Frazier	-	Customer	-	1/13/2021	Dennis Howard	Case about Tablets	1/13/2021, 6:48 AM	655	☑	☐
8	-	Eric Gutierrez	ID	Partner	-	1/13/2021	Eric Sanchez	Case about Tablets	1/13/2021, 6:48 AM	655	☑	☐

Create Custom Report Type

To Create Reports for Custom Object we need to enable Reports at Object Level.

Create a Custom Report Type When

- You wanted to create the report for custom object
- You wanted to change the Label for a field in Report. For Example, You wanted to display Sales Person instead of Owner for Opportunity Reports
- You wanted to show the records from the relationships between the objects. For Example, Accounts with/without Contacts

Dashboards in Salesforce

Dashboards are the collection of reports which can help you to visualize the data from various reports and higher management can take the decision. Dashboards also shows the real time data.

You can send the Dashboard to your management over email and they can validate the data and take the further actions.

Dashboard
Accounts Dashboards
As of 08-Jun-2022, 3:52 pm · Viewing as Admin User

Refresh | Edit | Subscribe

Accounts With Contacts

View Report (Accounts With Contacts)

Top 10 Account based on Revenue

Account Name ↑	Billing State/Province	Account Record Type	Type	Rating
Burlington Textiles Corp of America	NC	Customer Account	Customer - Direct	Warm
Dickenson plc	KS	-	Customer - Channel	-
Edge Communications	TX	-	Customer - Direct	Hot
Express Logistics and Transport	OR	-	Customer - Channel	Cold
Farmers Coop. of Florida	FL	Customer Account	-	Hot
GenePoint	CA	-	Customer - Channel	Cold
Grand Hotels & Resorts Ltd	IL	-	Customer - Direct	Warm

View Report (Top 10 Account based on Revenue)

Exercise

Create a Dashboards and add below components into the Dashboard.

- Accounts By Industry Report
- All Accounts by Revenue Report

Assignment

Create a Dashboards and add all the reports related to cases & name the dashboard as Case Dashboard

Reports & Dashboards Folders

1. We can create folders for reports and dashboards to manage and organize the reports and dashboards for different departments, regions and operations
2. We use Report and Dashboards folders to share the reports with users, group, roles & etc

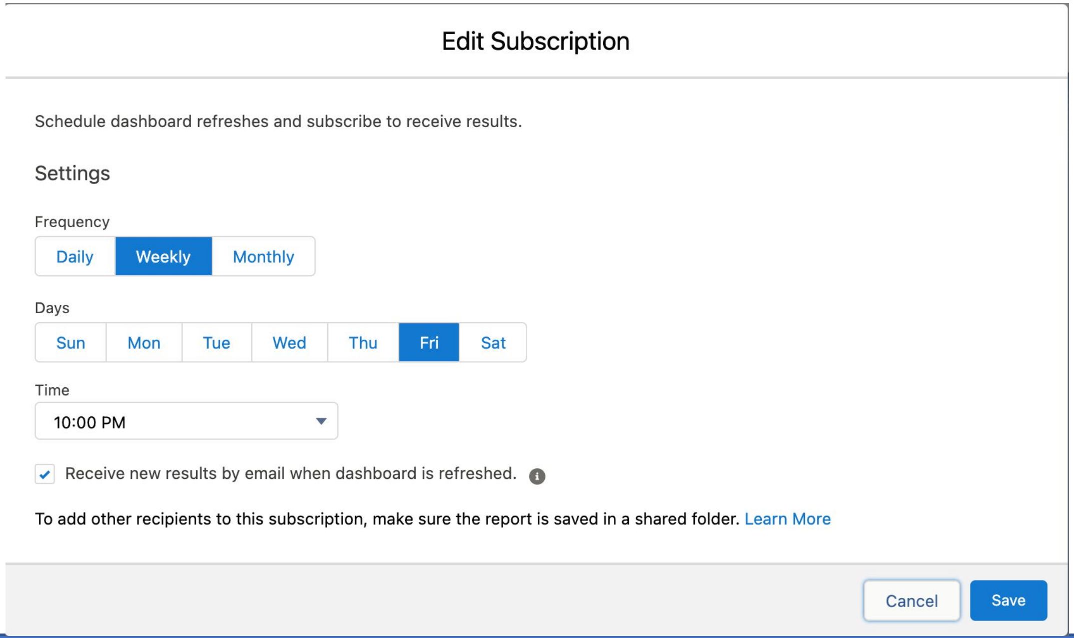
Create Folders for the following functionality

1. Support Management
2. Lead Management
3. Account Management

Subscribe & Dashboards in Salesforce

Subscribe the reports and dashboards to receive the updates from reports directly in your inbox. Subscribing the reports & dashboards will help your higher management to review the data directly from inbox without login to salesforce org.

1. Subscribe the dashboard to send the email to Admin user every week Monday at 9:00 AM
2. Schedule the report to send the email to Admin user every week Monday at 9:00 AM



Bucket field in Reports

1. Bucket field in Salesforce is used to categorized the data without creating an extra field in Salesforce Object.
2. When you create a bucket column, you define multiple categories (buckets) used to group report values

Example – Create a bucket field to categorize the account based on Annual Revenue

- Annual Revenue between 1000 – 10000 (Small)
- Annual Revenue between 10000 – 100000 (Medium)
- Annual Revenue between > 100000 (Large)

Similarly, you can use for employee's fields on Account Object

Limits

- **Total Bucket Fields allowed per report** - 5
- **Total Buckets allowed per Bucket Field** - 20

Row Level formula fields in reports

Row-Level formula field is another quick way to create a field in report as a column without creating an additional field in object.

Examples -

1. Calculate the time to close the case in Case Report or How many days it took to close an opportunity-on-opportunity record - CLOSE_DATE - DATEVALUE(CREATED_DATE)
2. Which case subjects mention the word "widget"? - IF(CONTAINS(SUBJECT, "widget"), "Yes", "No")

You can have only 1 Row Level formula field at Report Level

https://help.salesforce.com/s/articleView?id=sf.reports_formulas_row_level_limits.htm&type=5

Report Limitations in Salesforce

1. In Salesforce Classic, you can't have more than 250 groups or 4,000 values in a chart.
2. In Lightning Experience, a report chart can have at most 2000 groups.
3. Reports display a maximum of 2,000 rows. To view more rows, export the report to Excel or use the printable view for tabular and summary reports. For joined reports, printable view displays a maximum of 20,000 rows.
4. You can have only 1 Row-Level Formula Field in a single report
5. You can have only 5 bucket field in a single report
6. One Bucket field can have upto 20 Buckets

https://help.salesforce.com/s/articleView?id=sf.rd_reports_dashboards_limits.htm&type=5

User Management in Salesforce

- Profiles ✅
- Users
- Roles
- Permission Set
- Permission Set Groups

Profiles & Users

A profile in Salesforce is a group/collection of settings and permissions that define what a user can do in Salesforce.

A profile controls

- Object permissions
- Field permissions
- Tab settings
- App settings
- Page layouts
- Record Types
- Login hours
- Login IP ranges.
- Apex class access
- Visualforce page access

Type of Profiles

1. **Standard profiles:** By default, salesforce provides below standard profiles. We cannot delete standard ones.
    1. **Read Only, Standard User, Marketing User, Contract Manager, Solution Manager & System Administrator.**
    2. Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.
2. **Custom Profiles:** Custom ones defined by us. They can be deleted if there are no users assigned to that particular one.

Exercise

1. Clone the profile using Salesforce **"Minimum Access - Salesforce"** Profile Available if this profile is not available then use Standard Profile to clone & Name it **Teachers Profile**
   - Object & Field Access
   - Tab Access
   - Record Type Access
   - App Access
   - Check important permissions
     - Author Apex
     - Reports
2. Clone the profile using Salesforce **"Minimum Access - Salesforce"** Profile Available if this profile is not available then use Standard Profile to clone & Name it **Panther Schools - Sales Profile**

Assignment

1. Give the Below Object permission to Both the Profiles Salesforce that we have created.

Object Name	Access Level
University	Read
College	Read
Student	Read/Write
Rating	Read/Write
Attendance	Read/Write
Subject	Read

Also give the field level access if the Object Level Access is Read then Give Read Only Access & If the Object Level Access it Read/Write then provide Read/Write Access

User Management in Salesforce

- Profiles
- Users ✅
- Permission Set
- Permission Set Groups
- Roles

Users in Salesforce

- User is an Individual who logs into the Salesforce to perform their duties
- Users are employees at your company like, Sales Rep, Service Rep, IT Specialists, Manager, CEO etc.
- Every user in Salesforce has a user account and unique username
- One User can have only one profile, and this is required

Exercise

1. Create a User and Name it **Joshua Jacob**, User Your Email, "Sales Person" as Title & Admin User as Manager. Use "**Panther Schools - Sales Profile"** for Profile.
   a. Prepare the Username with the combination of joshua.jacob + today's date + your favourite colour@udemy.com.your initials
   b. Example - **joshua.jacob+09062022@udemy.com.black**
2. Set the Password and take a tour of newly created user

Permission Set

The permission set is also very similar to profile. Whatever you can manage at profiles (Like Object permissions, Field Permissions, User permissions, Tab settings, App settings, Apex class permission, VisualForce permission) the same you can manage here also.

1. One user can have multiple permission set
2. Permissionset are used to give extra permission and Using Permissionset you can not reduce the permission

Note:- With the help of permission set we can only give extra permissions but we can not revoke the permission.

Permission Set

For Example, You have 10 users under Panther Schools - Sales Profile & You wanted to give the Permission to Create the Contact Record to a specific user then we will do this using permission set.

Exercise

Create a permission set “**Student Fee Access**” and give the edit access for the following fields of Student Object

1. Annual Fee
2. Fee Discount

Create another permission set “**Account & Contact Access**” and give the edit access for the account fields and Create Access for Contact.

Permission Set Group

- Use a permission set group to bundle permission sets together based on user job functions.
- Users assigned the permission set group receive the combined permissions of all the permission sets in the group.
- You can include a permission set in more than one permission set group

Example: Suppose that you have users in your sales department with these requirements.

- Use Sales Cloud Analytics templates and apps
- Create, edit, and delete surveys
- Read, create, edit, and delete accounts and opportunities
- Create and customize list views and reports

You have three permission sets that contain the permissions you need, plus other permissions.

- Sales Cloud Einstein
- Survey Creator
- A permission set based on the Standard User Profile

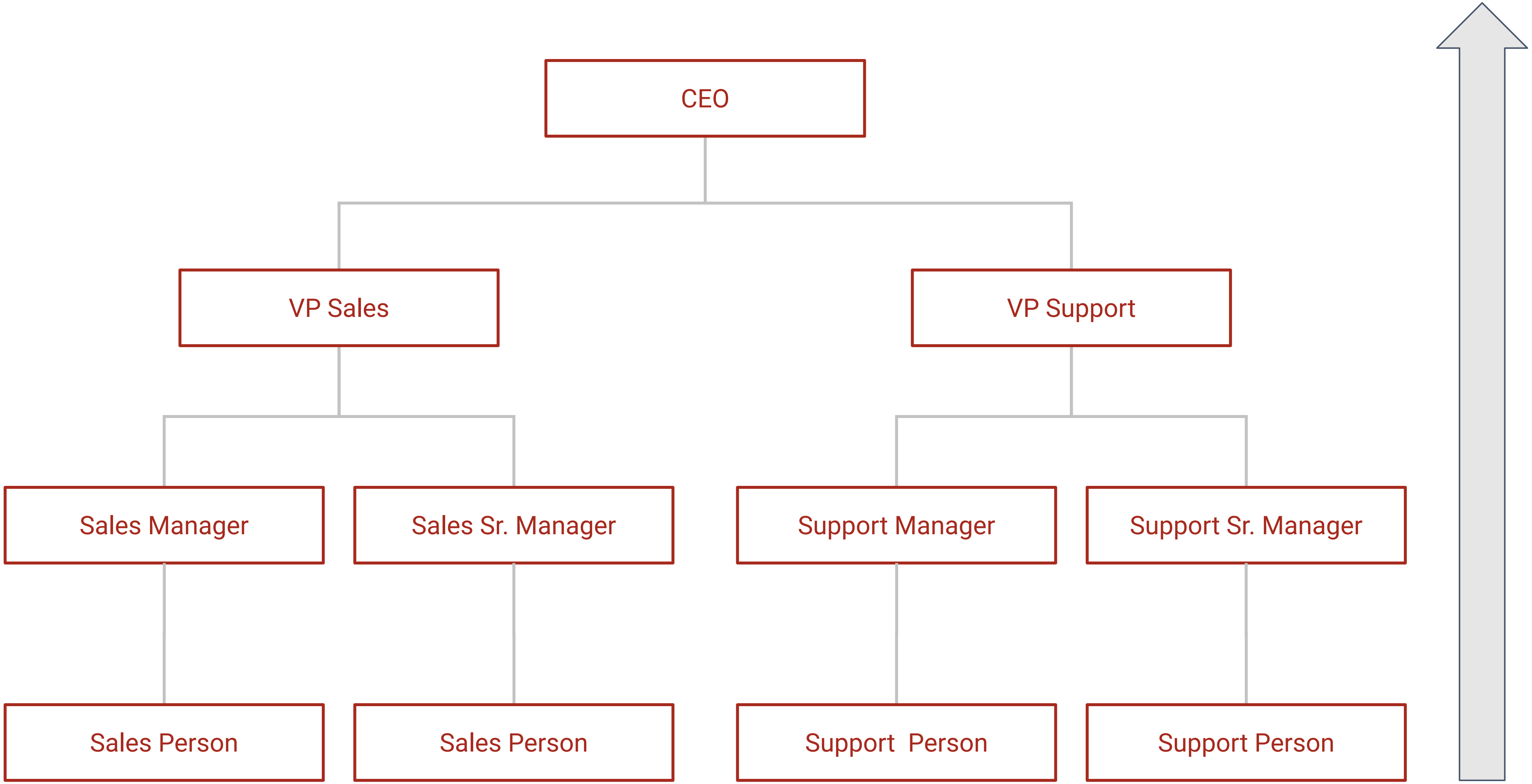
Roles in Salesforce

Roles are designed to increase data visibility, to open up access to Salesforce records. You will have a baseline visibility set for each object in your org, known as the ‘org wide default’ (organizational wide default, OWD).

Examples of this could be:

Opportunities are set to ‘Private’, which means that users can only see the opportunities they own.
Accounts are set to ‘Public Read/Write’, so that any user can help to update account information.

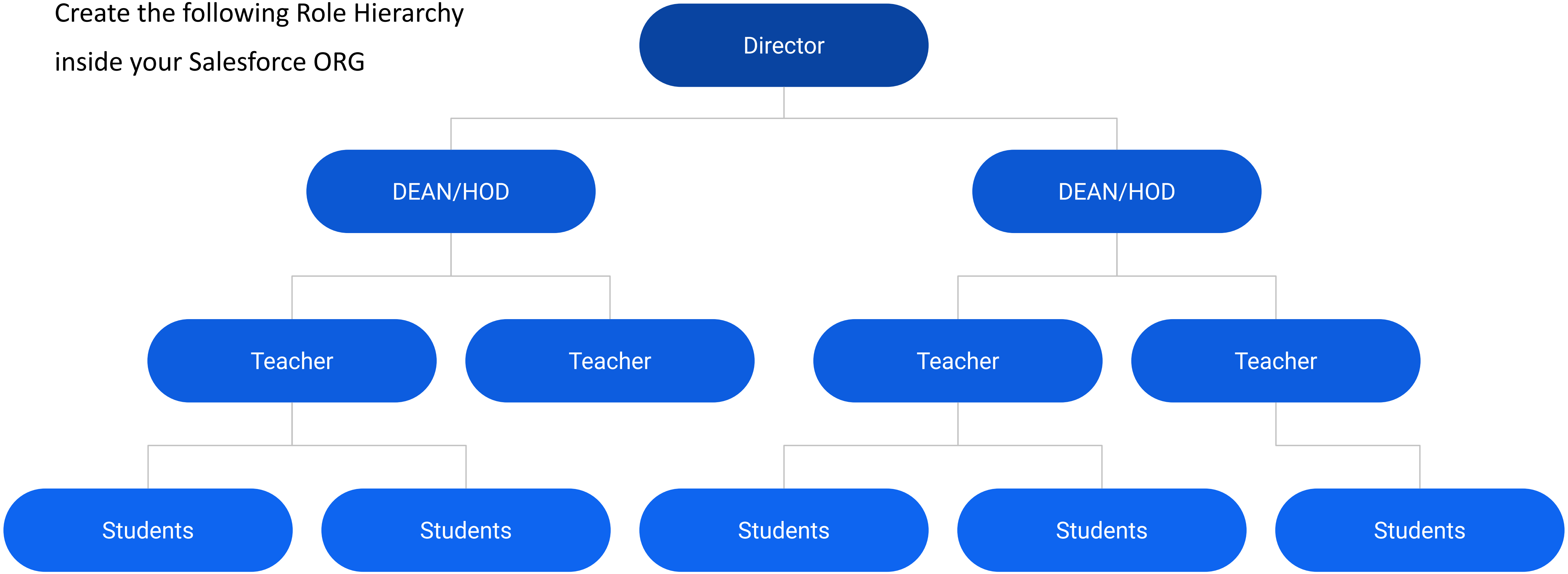
Roles in Salesforce



Exercise

Create the following Role Hierarchy

inside your Salesforce ORG



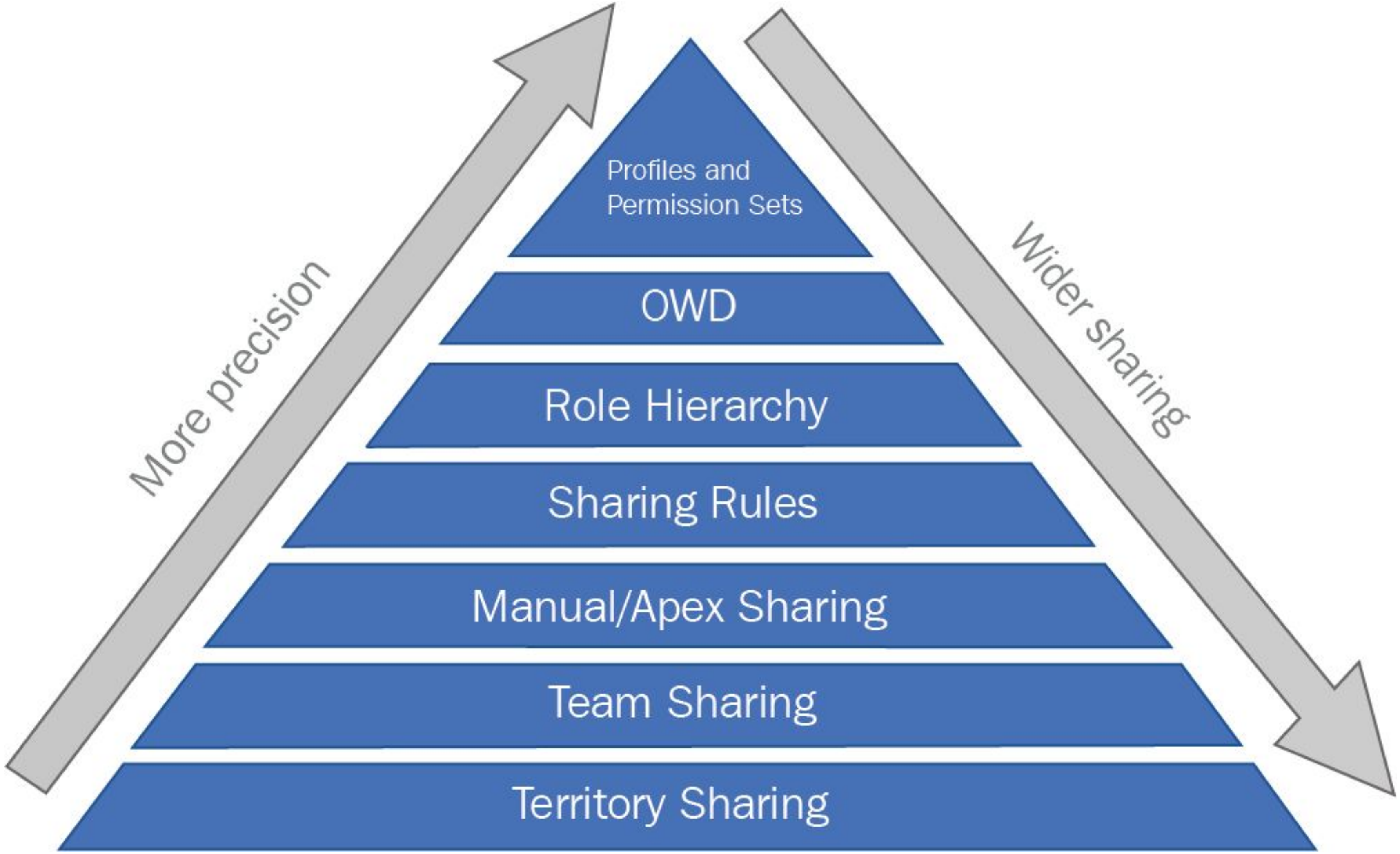
Record Level Sharing

Record-level security lets you give users access to some object records, but not others. Every record is owned by a user or a queue. The owner has full access to the record. Below are the ways we share the record level access

1. Profile/Permission Set
2. OWD
3. Role Hierarchy
4. Sharing Rules
5. Manual Sharing
6. Apex Sharing
7. Team Sharing
8. Groups
9. Queues
10. Territory Sharing

Question - How many # of ways to share the records in Salesforce

Guide to Record Sharing



Organization-Wide Sharing Defaults (OWD)

Organization-Wide Sharing Defaults sharing is the default level security for the records and controls how the Role Hierarchy will play the role in record sharing.

Types of Sharing Defaults

- private
- public read only
- public read/write
- public read/write/transfer
- Controlled by parent

Note:- If a user profile does not have access to an object then OWD will not come into picture. For example, The User "**Admin use**r" Profile or any assigned permission set does not have access to Student Object then OWD will not come into the picture for that user

When to use Which OWD

We always try to use Private as a default OWD for each object and then use various ways to share the records to the required group of users/roles. However here are some questions that you can ask yourself and set the OWD accordingly.

- **private** - Always try to make private
- **public read only** - Does all the users inside needs the read access to the record then yes otherwise private.
- **public read/write** - Not Recommended. Use sharing rules to give extra permissions

Roles in OWD

1. **Private** - If the OWD of an object is set to private then the record owner and the user above the Role Hierarchy can access the record.
2. **Public Read Only** - If the owd is public read only then any user who have access to object (min read) can access the record.
3. **Public Read/Write** - If the owd is public read only then any user who have access to object (min read) can access the record and modify the record as well if the permission is enabled from profile or permission set.

Example

For Example, the OWD for account object is private and owner is user A. Use B & C are above into the Role Hierarchy where User B has the Read Access to Account & User C does not have access to account. In this case Only User B will be able to access the account Record.

Exercise

Validate the OWD for the Following Objects

- **Student** - Public Read Only
- **Subject** - Private
- **Rating** - Controlled by Parent
- **College** - Public Read Only
- **University** - Public Read Only
- **Student Subject** - Controller By Parent
- **Account** - Private
- **Contact** - Controlled By Parent

Sharing Rules in Salesforce

Sharing Rules in Salesforce are used to give the extra permission of a record(s) to the Group of Users of Roles. When We set the OWD set to private or public read only then we can use sharing rules to give additional permissions to the users.

Types of Sharing Rules

- Owner Based Sharing Rule
- Criteria Based Sharing Rules

With the help of sharing rules we can share the records to Public Groups or Roles. If we want to share the record to a user then we need to use a public group for the same.

Note: - Sharing rules only works when the OWD is set to Private/Public Read Only for either Internal or External users(Digital Experience)

What happens when we share a record

When we share a record in salesforce then a Share Object get's created inside Salesforce object. A share object becomes available when we set the OWD of any object to private/public read only.

By default the share object is available for all the standard object. The share object API name will be

- For Standard Object, API Name + Share. For Example, AccountShare, LeadShare & etc
- For Custom Object, API Name without __c + __Share. For Example Student__Share, Invoice_Item__Share

Exercise

1. Create a Sharing Rules to Shared the record Owned by Role CEO to CEO Public Groups with Read Only Capacity
2. Create a Sharing Rules to Share all the USA Account records to USA Account Groups & NoN-USA accounts to International Accounts public Group.

Question -

You need to share the record to 20 different roles which are not in hierarchy and you need to use only one sharing rule, So how you will achieve this requirement?

Answer -

Create a public group, add all the roles into that public group and then share the records with that group using sharing rule.

Assignment

1. Create Public Groups for All the Departments
   a. CSE Student Group
   b. IT Student Group
   c. ECE Student Group
   d. CE Student Group
2. Create multiple sharing rules to share the student records
   a. CSE Students will be shared with CSE Student Group
   b. IT Students will be shared with IT Student Group
   c. ECE Students will be shared with ECE Student Group
   d. CE Students will be shared with CE Student Group

Manual Sharing

Manual Sharing is used to share the record manually to the user, group or roles.

We use manual sharing when we want to share the record for certain period of time to the certain users or group of users.

For Example, You are working as Salesforce Rep and going on PTO then you can share all your cases and opportunities to the particular user or group.

Note:- With manual sharing we can share the record to single user as well where as using sharing rules we can only share the records to Groups & Roles.

Teams in Salesforce

Teams as name indicates a group of people works together in order to achieve a common goal. In Salesforce there are total 3 types of teams

- Account
- Case
- Opportunity

Account Teams in Salesforce

When you collaborate on accounts with colleagues, use account teams to facilitate teamwork and track progress. Roles on a team can include an executive sponsor, a dedicated support agent, and a project manager, for example. Team members can be internal users or partner users.

TECHNICAL AMIT

Assignment

Explore on how the Opportunity & Case Team works with Salesforce

- Case Team
- Opportunity Team

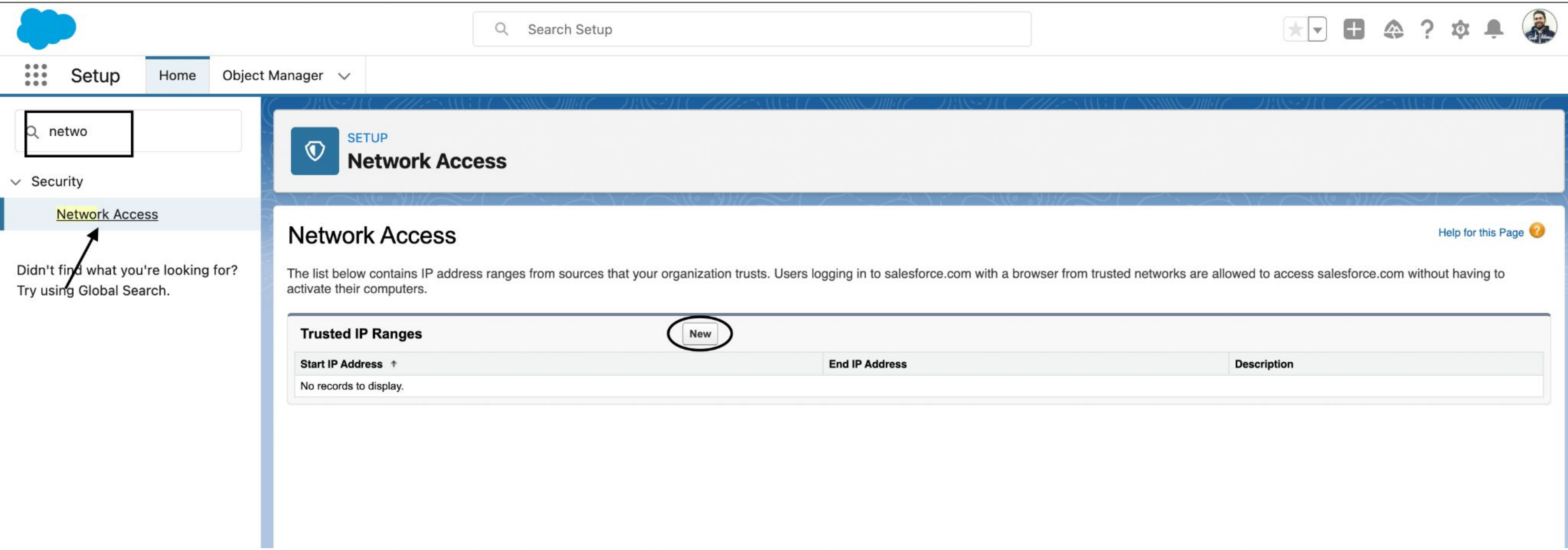
ORG Level Security

- Username & Password
- Network IP
- Login IP & Login Hours
- Login Access Policies
- 2FA
- User Deactivate & Freeze

Network IP in Salesforce

1. **Network Access** allows users authenticating from these IP addresses to bypass the need for identity verification for user interface logins or the security token for API connections.
2. Users will not be challenged with the 5-digit verification code to authenticate the IP address from where they are logging in. All the customer apps and integration will not require the security token.
3. Users who log in from IP ranges not listed, will still be able to authenticate after providing the verification code or security token.
4. These can only be added or removed by a system administrator. Removing them from Network Access will not revoke access from these IP addresses.

Network IP in Salesforce



Login IP & Login Hours in Salesforce

Login IP Control login access at the user level by specifying a range of allowed IP addresses on a user's profile. When you define IP address restrictions for a profile, a login from any other IP address is denied.

Login Hours are used to restrict the users to login within specific hours only. For Example user can only login to 9:00 AM - 6:00 PM

Login Access Policies in Salesforce

With the help of login access policies we can enable any admin to login as any other users inside salesforce org and debug any issues if there are any. At a user level you can also give the access to admin/salesforce support so that they can login on behalf of yours.

Exercise

1. Add the Login IP for the Profile other than System Administrator
2. Grant Login Access Policy for all the users & for single user as well

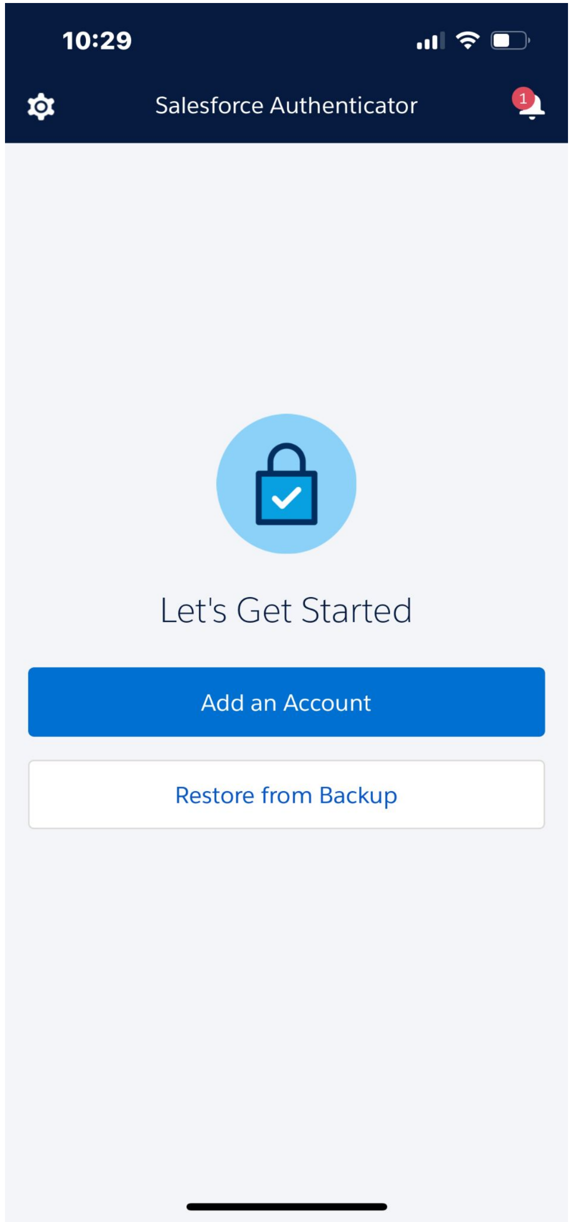
Multi Factor Authentication in Salesforce

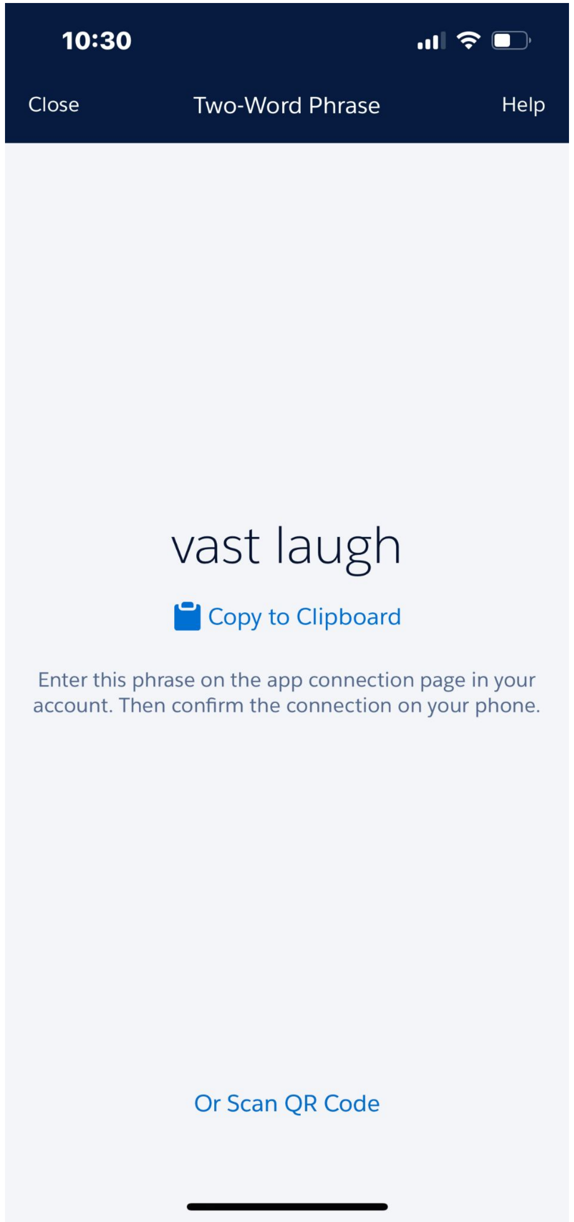
Multi-factor authentication adds an extra layer of protection against common threats like phishing attacks, credential stuffing, and account takeovers. Implementing MFA is one of the most effective ways your company can increase the security of your Salesforce data.

https://trailhead.salesforce.com/content/learn/modules/identity_login/identity_login_2fa

Various ways to add extra layer of security

1. TOTP
2. Salesforce Authenticator
3. SMS
4. Email
5. Login Flow


10:29
Salesforce Authenticator
Let's Get Started
Add an Account
Restore from Backup


10:30
Close
Two-Word Phrase
Help
vast laugh
Copy to Clipboard
Enter this phrase on the app connection page in your account. Then confirm the connection on your phone.
Or Scan QR Code

Exercise

Enable Multiple Factor authentication for your salesforce org.

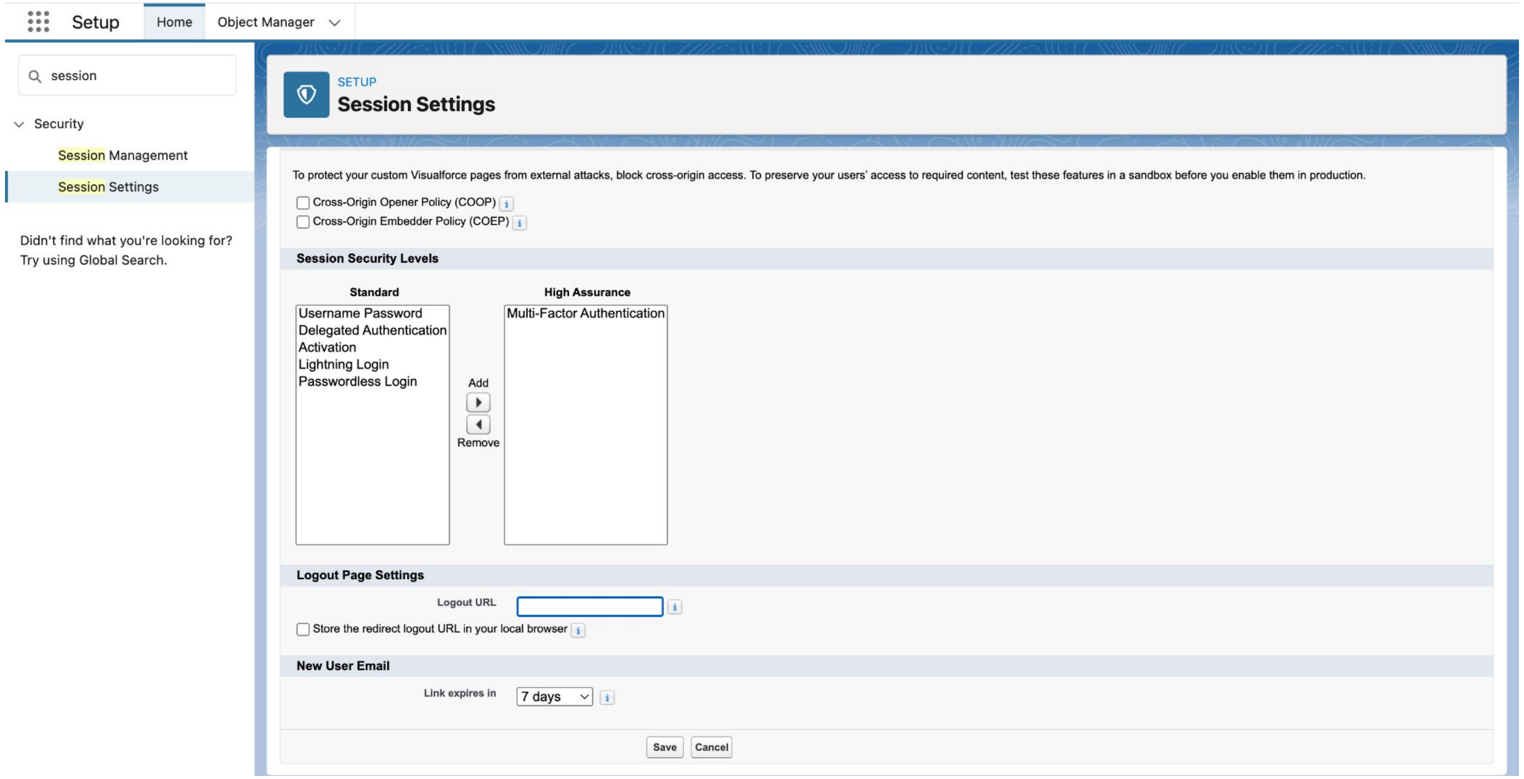
- Install Salesforce Authenticator application
- Enable Multiple Authentication
- Test it

User Deactivate & Freeze

1. Deactivating a user permanently will free up the User Licence and User will not be able to login to salesforce org. And you can use the same licence to create another user.
2. Freezing a user will prevent the users to login to Salesforce but licence will be occupied

Session Settings Salesforce

Use the Session Settings screen to configure session security. You can configure settings such as the session connection type, timeout restrictions, and IP address ranges to protect against malicious attacks.



Exercise

Learn about below things

- Session Timeout
- Login User Email
- Session Security Level
- Chaching

Setup Audit Trail

The Setup Audit Trail feature in Salesforce enables you to closely track changes made to your organization.

It records all modifications concerning the administration, customization, security, sharing, data management, development, and more of your Salesforce organization.

Data Import Wizard

Data Import Wizard is used to import the data to salesforce and it is web based wizard which does not require any installation.

With the help of data import wizard we can import the data to following standard objects

- Account
- Contact
- Lead
- Solution

We can import all the custom objects using Data Import wizard.

Use the Import Wizards When:

- You’re loading less than 50,000 records.
- The object you must import is supported by import wizards. To see what import wizards are available and thus what objects they support, from Setup, enter Data Import Wizard in the Quick Find box, then select Import Wizard.
- You want to prevent duplicates by uploading records according to account name and site, contact email address, or lead email address.
- Your target object has fewer than 50 fields.
- Your data doesn’t include complex field mappings.

Exercise

- Import Contact Records to Salesforce
- Import Contact Record Related to Account in Salesforce.

Assignment

Import the Account Records to Salesforce using Salesforce Data Import Wizard. You can generate the csv file using below link

https://www.mockaroo.com/

Agenda

- Data Loader Installation
- Data Loader
- Difference between Data Import Wizard and Data Loader

Install Data Loader

1. Install the Data Loader for Windows platform -

   https://developer.salesforce.com/docs/atlas.en-us.dataLoader.meta/dataLoader/loader_install_windows.htm

2. Install the data loader for MAC Platform

Note:- Before installing the Data Loader on Windows or MAC we need to install the JRE.

Data Loader

Use Data Loader When You:

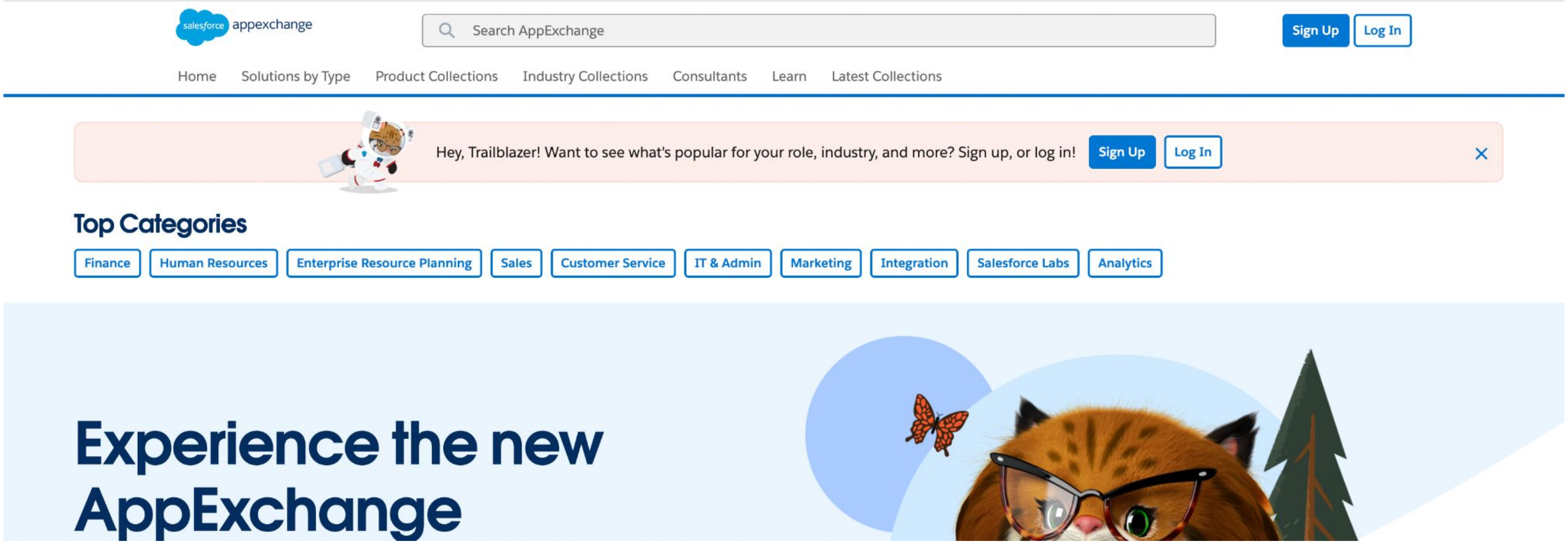
1. You must load as many as 5,000,000 records. Data Loader is supported for loads of up to 5 million records. If you must load more than 5 million records, we recommend you work with a Salesforce partner or visit the AppExchange for a suitable partner product.
2. You must load into an object that isn't yet supported by the import wizards.
3. Your data includes complex field mappings that you must load consistently on a regular basis.
4. You want to schedule regular data loads, such as nightly imports.
5. You want to export your data for backup purposes.

Difference between Data Import Wizard and Data Loader

Data Import Wizard	Data Loader
It can load up to 50,000 records.	It can load up to 5,00,000 records.
It supports all the custom objects and only a few standard objects like Account, Contact, Campaign members, person accounts, Leads, and Solution.	It supports all custom and standard objects.
Delete operation is not available.	Delete operation is available.
It doesn’t require installation.	It requires installation.

Introduction to AppExchange

AppExchange is a marketplace offering solutions, such as apps, components, and consulting services. To make your own solution publicly available to potential customers, you must be a Salesforce partner.



Dynamic Forms in Salesforce

Break Up Your Record Details with Dynamic Forms.

With Dynamic Forms you'll be able to:

- Place fields anywhere on the layout without needing to add them to the traditional page layout ("Details" tab)
- Use visibility rules to make fields and components appear and disappear based on criteria you choose.
- Do away with multiple page layouts.
- Improve page load times.

Dynamic Action in Salesforce

With Dynamic actions you can add flexibility and control to actions on your record pages. Assign dynamic actions in the Lightning App Builder instead of in the page layout editor, and then apply filters to control when and where actions are visible to users.

You can create dynamic actions for custom objects on mobile and desktop and for some standard objects on desktop.

- Account
- Contact
- Lead
- Opportunity
- Case

All other standard objects are Beta for desktop.

TECHNICAL AMIT

Project – Invoice Management

- Introduction
- Data Model

Multiple Choice Questions

https://developer.salesforce.com/files/ti/thi/THI-000393/administratorpracticetest.html

https://www.salesforceben.com/salesforce-admin-practice-exam/

https://focusonforce.com/salesforce-adm-201-exam-questions/