ADMINISTRATION ESSENTIALS FOR NEW ADMINS (GETTING YOUR ORGANIZATION READY FOR USERS)

Exercise Guide

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2-1: Check the Company Profile

Goals:

John Wiseman, CEO, wants to know how many available user licenses there are to ensure there are enough as the sales teams expand internationally.

Ling Wu, VP of Human Resources, wants to know what the default locale, language, and time zone settings are so that she knows what additional information to provide when you're setting up non-US users.

Tasks:

1. Review the company profile to determine the number of available user licenses.
2. Review the company profile and the default locale, language, and time zone settings.

Time:

5 minutes

Instructions:

1. Review the company profile to determine the number of available user licenses.
   A. Click **Setup | Company Profile | Company Information**.
   B. From the User Licenses related list, make a note of the number of remaining Salesforce licenses.
2. Review the company profile to determine the default locale, language, and time zone settings.

2-2: Check the Fiscal Year and Set Up the Euro Currency

Goal:

Brent Bassi, VP of Finance, has asked you to check that the fiscal year has been set correctly. He has also requested that you set up the Euro with the latest exchange rates.

Tasks:

1. Ensure the fiscal year is a standard year, starting January 1.
2. Activate the Euro currency, and add exchange rate.
3. Test the new currency with an opportunity, and make a note of the converted amount.

Time:

10 minutes

Instructions:

1. Ensure the fiscal year is a standard year, starting January 1.
   A. Click **Setup | Company Profile | Fiscal Year**.
   B. Answer the following questions:
      i. What type of fiscal year is selected: standard or custom?
      ii. What is the fiscal year start month?
      iii. What will the name of the current fiscal year be?
2. Activate the Euro currency, and add exchange rate.
   A. Click **Setup | Company Profile | Manage Currencies**.
   B. Click **New**, and then set up the Euro.
      i. Currency Type: **EUR – Euro**
      ii. Conversion Rate: (enter current rate)
      iii. Decimal Places: `2`
   C. Click **Save**.
3. Test the new currency with an opportunity, and make a note of the converted amount.
   A. Click the **Opportunities** tab.
   B. Click **New**, and then create a new opportunity.
      i. Opportunity Name: `Euro Currency Test`
      ii. Account Name: `ABC Labs`
      iii. Opportunity Currency: **EUR – Euro**
      iv. Close Date: (end of current month)
      v. Stage: **Closed Won**
      vi. Amount: `10k`

C. Click **Save**.

   i. Make a note of the converted amount (shown in parentheses in Amount field).

2-3: Update Exchange Rates

Goal:

Brent Bassi, VP of Finance, has asked you to update the exchange rate weekly.

Tasks:

1. Update the exchange rate.
2. View the opportunity from the earlier exercise and compare the converted amount to the one you noted.

Time:

5 minutes

Instructions:

1. Update the exchange rate.
    A. Click **Setup | Company Profile | Manage Currencies**.
    B. Click **Edit Rates**, and then edit the rate.
        i. Euro: `1.00`
    C. Click **Save**.
2. View the opportunity from the earlier exercise and compare the converted amount to the one you noted.
    A. Click the **Opportunities** tab.
    B. From the Recent Opportunities list, click **Euro Currency Test** and compare the converted amount to the one you noted earlier.

2-4: Update the Euro Exchange Rate with ACM

Goal:

You want to be able to update exchange rates weekly without affecting historical opportunities.

Tasks:

1. Enable advanced currency management.
2. Update the Euro exchange rate using the first day of next month as the Start Date.
3. Edit the Close Date on the Euro opportunity to see how the converted amounts change depending on the respective exchange rates.

Time:

5 minutes

Instructions:

1. Enable advanced currency management.
   A. Click **Setup | Company Profile | Manage Currencies**.
   B. Click **Enable**.
   C. On the confirmation that appears, select the **Yes, I want to enable Advanced Currency Management** checkbox, and then click **Enable**.
2. Update the Euro exchange rate using the first day of next month as the Start Date.
   A. Click **Manage Dated Exchange Rates**, and click **Continue** on the splash screen.
   B. Click **New Exchange Rates**, and then complete the fields.
      i. Start Date: (first day of next month)
      ii. Euro: `1.13`
   C. Click **Save**.
3. Edit the Close Date on the Euro opportunity to see how the converted amount changes depending on the exchange rate.
   A. Click the **Opportunities** tab.
   B. From the Recent Opportunities list, click **Euro Currency Test** and compare the converted amount to the one you noted earlier.
   C. Click **Edit**, and change the Close Date to the first date of next month.
   D. Click **Save**.

   Notice how the converted amount has changed because the new exchange rate is being used.

2-5: Modify the UI to Improve User Experience

Goal:

Noah Larkin, VP of Services, has been reviewing internal support cases and has provided you with a list of issues involving the user interface. Try to resolve these issues.

Tasks:

1. Navigate around the user interface to identify the issues listed.
2. Modify the user interface settings to resolve the issues.
3. Navigate around the user interface again to see if the issues have been resolved.

Time:

10 minutes

Instructions:

1. Navigate around the user interface to identify the issues listed.
   A. Click the **Accounts** tab, and consider the following for the sidebar:
      i. Would it benefit users if we allowed them to collapse the sidebar?
      ii. Is the Quick Create component at the bottom of the sidebar encouraging users to create incomplete records? (Remember, there's one on the Leads, Contacts, and Opportunities tabs, too!)
   B. Click **Go!** next to the View picklist, and consider the following:
      i. Would there be any issues if we allowed users to edit fields directly from a list view or edit multiple records at the same time?
      ii. Would there be any security issues if we allowed users to print directly from a list view?
2. Modify the user interface settings to resolve the issues.
   A. Click **Setup | Customize | User Interface**.
   B. Modify the following settings, leaving all other settings unchanged.
      i. Show Quick Create: **Deselect**
      ii. Enable Enhanced Lists: **Select**
      iii. Enable Printable List Views: **Select**
      iv. Enable Collapsible Sidebar: **Select**
   C. Leave all other settings unchanged.
   D. Click **Save**.
3. Navigate around the user interface again to see if the issues have been resolved.
   A. Click the **Accounts** tab, and try the following with the sidebar:

i. Hover over the **left-hand edge** of the page and click to expand the sidebar.
ii. Hover over the **right-hand edge** of the sidebar and click to collapse it.
iii. Hover over the **left-hand edge** of the page and click to expand the sidebar again.

B. Look for the Quick Create component. It's gone!
C. Click **Go!** next to the View picklist, and try the following:

i. Using the checkboxes on the left, select the **first three** records, and then double-click the **Type** field on the first record.

Notice how this lets you use inline editing to mass edit the records.

ii. Click **Cancel**.
iii. Click **Printable View** (printer icon) in the top right corner to see a printer-friendly version of the list in a new window. Close this window.

2-6: Configure Searches

Goal:

Sales reps need to be able to find contact details for their customers as quickly as possible. Allison Wheeler, the VP of Global Sales, has asked you to configure searching to make it easier for sales reps to find the contact information they need.

Tasks:

1. Limit the number of accounts and contacts displayed in search results to 10 per page.
2. Add Mailing City and Mobile columns to the Contact search results.
3. Add Account Name and Title filters to the Contact search results.
4. Test the changes.

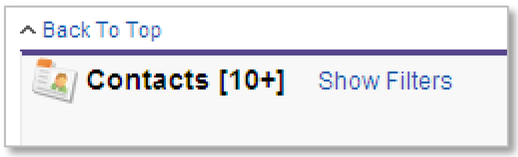
Time:

10 minutes

Instructions:

1. Limit the number of contacts displayed in search results to 10 per page.
   A. Click **Setup | Customize | Search | Search Settings**.
      i. Under Number of Search Results Displayed per Object, from the Objects to update list, select **Accounts** and **Contacts**. (Hold down **CTRL** to select both at the same time.)
      ii. In the Results per page for selected objects box, enter `10`
   B. Click **Save**.
2. Add Mailing City and Mobile columns to the Contact search results.
   A. Click **Setup | Customize | Contacts | Search Layouts**.
   B. In the Action column, click **Edit** in front of the Search Results layout.
      i. From the Available Fields list, select **Mailing City** and **Mobile** (using **CTRL**), and click **Add**.
      ii. In the Selected Fields list, use **Up** to move the fields to just below Account Site.
   C. Click **Save**.
3. Add Account Name and Title filters to the Contact search results.
   A. Click **Edit** for the Search Filter Fields layout.
   B. From the Available Fields list, select **Account Name** and **Title** (using **CTRL**), and click **Add**.
   C. Click **Save**.
4. Test the changes.

A. In the Global Search box, enter `jo` and select **Search for jo* (starts with)** from the search options that appear.
B. In the list of items on the left, click **Contacts (10+)**.
C. In the Contacts results, notice the following:
   i. Only the first 10 results are displayed.
   ii. Mailing City and Mobile are displayed.
D. Click the **Show Filters** link beside Contacts [10+] if the Contact filter fields are not already displayed.



E. In the Account Name filter, enter `abc` and click **Apply Filters**.

2-7: Create a Technology Accounts List View

Goal:

Marketing is currently targeting accounts in the technology and manufacturing industries. The team needs quick access to these accounts on a regular basis.

Task:

Create a list view to display accounts in the technology industry.

Time:

5 minutes

Instructions:

1. Create a list view to display accounts in the technology industry.
    A. Click the **Accounts** tab.
    B. Click **Create New View**.
        i. In Step 1, in the View Name field, enter `Technology Accounts`
        ii. In Step 2, add the filter criteria.
            a. Field: **Industry**
            b. Operator: **equals**
            c. Value: `Technology`
        iii. In Step 3, from the Available Fields list, select **Industry** and click **Add**.
        iv. In Step 4, select the **Visible to all users (Includes partner and customer portal users)** radio button.
    C. Click **Save**.

2-8: Create a Manufacturing Accounts List View

Goal:

Marketing is currently targeting accounts in the technology and manufacturing industries. The team needs quick access to these accounts on a regular basis.

Task:

Create a list view to display accounts in the manufacturing industry.

Time:

5 minutes

Instructions:

1. Create a list view to display accounts in the manufacturing industry.
   A. Click the **Accounts** tab.
   B. Click **Create New View**.
      i. In Step 1, in the View Name field, enter `Manufacturing Accounts`
      ii. In Step 2, add the filter criteria.
         a. Field: **Industry**
         b. Operator: **equals**
         c. Value: `Manufacturing`
      iii. In Step 3, from the Available Fields list, select **Industry** and click **Add**.
      iv. In Step 4, select the **Visible to all users (Includes partner and customer portal users)** radio button.
   C. Click **Save**.

2-9: Create Public and Private Chatter Groups

Goals:

Create Chatter groups to replace group email lists. Post a link to additional training and mark it with a topic tag so that users can easily search for training-related posts.

Tasks:

1. Create Chatter Groups for All Sales (public) and All Support (private).
2. Post a link to the All Support group that explains how to use @mentions.
3. Click #training in your Chatter post to see other conversations in the company regarding training.

Time:

10 minutes

Instructions:

1. Create Chatter groups for All Sales (public) and All Support (private).
   A. Create the All Sales Chatter group.
      i. Click the **Chatter** tab and click **Groups** on the left.
      ii. Click **New Group**.
      iii. Fill in the new group information.
         a. Group Name: `All Sales`
         b. Description: `Collaboration space for all things related to Sales.`
         c. Group Access: **Public**
      iv. Click **Save**.
   B. Click **Add Members**.
   C. Add group members. Use the lookup box to find the people on the list, and click **Add**.

      Allison Wheeler
      Kathy Cooper
      Jessica Heinz
      Diego Cruz
      An Lin
   D. Click **Done**.
   E. Click **Change Roles**.
   F. Grant **An Lin**, **Kathy Cooper**, **Diego Cruz** and **Jessica Heinz** Manager status.

G. Click **Done**.
H. Post the following to the All Sales Group:

`Welcome to the All Sales group, which replaces the All Sales email list. All members at the Director level have been granted Manager rights, so you can now add your own team members to this group.`

I. Click **Share**.
J. Repeat Step 1, A to create the All Support group.

   i. Group Name: `All Support`
   ii. Description: `Collaboration space for all things related to Support.`
   iii. Group Access: **Private**

K. Repeat Step 1, B-G to add **Noah Larkin, Roberta Spada**, and **Lars Ross** as members of the group, and give **Roberta Spada** manager rights.
L. Post the following to the All Support Group:

`Welcome to the All Support group, which replaces the All Support email list. @Roberta Spada is a group manager, so please send her any team members you would like to add to this group.`

M. Click **Share**.

2. Post a link to the All Support group that explains how to use @mentions and @mention Noah Larkin that Cases are now Chatter-enabled.

A. Click **Help & Training**.
B. Search for the term `mention`
C. Click **Mentioning People and Groups in Posts and Comments**.
D. Copy the URL from the browser address bar.
E. On the All Support group page, click **Link**.
F. Post the following:

`Hi Support people! Here is some quick training on how to use the @mention feature, to bring another user or even an entire group into a Chatter conversation.`

`Use topic tags to organize posts in Chatter. Here's an example: #training`

   i. Link URL: (the link you copied)
   ii. Link Name: `Mentioning People and Groups in Posts and Comments`

G. Click **Share** to post the link to the All Support group.

3. Click **#training** in your Chatter post to see other conversations in the company regarding training.

2-10: Getting Ready for Salesforce1

Goal:

Review the Saleforce1 app components, and ensure that all users with iOS devices can self-authorize to use the app. Control the settings and answer some questions regarding the components.

Tasks:

1. Review the Salesforce1 app components.
2. Change the PIN requirements needed to access Saleforce1 using an iOS device, and answer a few questions based on the information you find in the app.

Time:

5 minutes

Instructions:

1. Review the Salesforce1 app components.
   A. Click **Setup | Manage Apps | Connected Apps**.
   B. Review the Connected Apps that are available in the organization.
2. Change the PIN requirements needed to access Saleforce1 using an iOS device, and answer a few questions based on the information you find in the app.
   A. In the Action column next to Chatter for iOS, click **Edit**.
   B. Under Mobile Integration, select the following:
      i. Require PIN after: **10 minutes**
      ii. Pin Length: **6**
   C. Answer the following questions:
      i. What are the two groups of Permitted Users? ______________________
      ii. Can you restrict access by IP address? ______________________
      iii. What are the pros and cons of having users log in to the app every time?

      ____

      ____

D. Click **Save**.

Homework:

To experience the app firsthand, download Salesforce1 on your Android or iOS device, and use your ADM201 login and password to log in.