

Credenciales de acceso Playground

- Usuario: edwin.estro@creative-badger-bnbp01.com
- Contraseña: Salesforce2

Bedu + Deloitte Salesforce
Bootcamp
Sesión 01

1. Obtener una organización de Salesforce y crear 3 usuarios.

Procedimiento:

Nos dirigimos hacia las Hands-On Orgs en Trailhead, para acceder a éstas, vamos haciendo click en nuestra foto de perfil en [Trailhead | The fun way to learn \(salesforce.com\)](#). Y en el menu desplegable encontraremos el acceso directo.

Hacemos click en “Create Playground” para crear nuestra organización, a continuación escribimos el nombre. Nuestra organización la llamaremos “Bedu Salesforce Administrator”. Una vez creada, damos click en “Launch”.

Dentro de la organización hacemos click en “Get your Login credentials” para saber cuál es nuestro nombre de usuario y poder obtener la contraseña al dar click en “Reset My Password”.

Para crear los usuarios nos tememos que dirigir al engrane en la esquina superior derecha, dar click y seleccionar “Setup”. Después nos vamos a la barra de búsqueda superior y escribimos “Users”.

Dentro de Users nos aparecerá una lista de usuarios que ignoraremos por ahora y damos click en “Add Multiple users” para crear nuestros 3 usuarios.



TRAILHEAD

 SearchEdwin Isaac Estrada Rodríguez
41 badges, 19,450 points

Today

Learn ▾

Credentials ▾

Community ▾

For Companies ▾

Hands-On Orgs

[Create Playground](#)[Connect Org](#)

Connected Orgs (6)

Launch, rename, or disconnect the orgs you use for hands-on challenges. Learn about managing your hands-on org in the [Trailhead Playground Management](#) module.

Bedu Salesforce Administrator LAST USED

Username creative-badger-bnbp01.com
Type Trailhead Playground
Created 5/18/2022
Last Activity Created on 5/18/2022

[Rename](#)[Disconnect](#)[Launch](#)[Edit](#)

The screenshot shows the Salesforce Setup interface with the following details:

Setup tab selected in the top navigation bar.

Search bar: Search Setup

Header icons: Home, Object Manager, and various system status indicators.

Left sidebar (under **Users**):

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users** (selected)
- Feature Settings
- Data.com
- Prospector Users

Message at the bottom: Didn't find what you're looking for? Try using Global Search.

Main Content Area:

SETUP **Users**

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users | [Edit](#) | [Create New View](#)

Action	Full Name ↑	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00dijy00000ixyn2as.85oamzet66gm@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
Edit	Estrada Rodríguez, Edwin Isaac	EEstr	edwin.estro@creative-badger-bnbn01.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
Edit	one_user	uone	userone@emailone.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
Edit	three_user	uthre	userthree@mailthree.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
Edit	two_user	utwo	usertwo@emailtwo.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
Edit	User_Integration	integ	integration@00dijy00000ixyn2as.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00dijy00000ixyn2as.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

3 Usuarios creados (3 Users created)

Bottom navigation: [New User](#) | [Reset Password\(s\)](#) | [Add Multiple Users](#)

Bottom footer: A | B | C | D | E | F | G | H | I | J | K | L | M | N | Ñ | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | [All](#)

Crear 2 perfiles con las indicaciones correspondientes.

Procedimiento:

Hacemos click en la barra superior dentro de “Setup” y escribimos “Profiles”, Damos click y comenzamos a crear nuestros perfiles. Dentro de “Profiles”, hacemos click en “New User”. En “Existing Profile” seleccionamos la opción “Standard Platform User”, y le ponemos de nombre “Usuario acceso mínimo”. Una vez creado nos aparece el perfil, el cual Podemos editar dando click en “Edit”, y deshabilitamos las casillas de ver, crear, editar o borrar.

Para crear el Segundo usuario, seguimos los mismos pasos pero solo vamos a quitar el acceso de lectura a nivel de campo. Así que en el mismo menu para editar permisos en el perfil, bajamos hacia la sección “Field-Level Security” y desactivamos el acceso a lectura de “Title” y “Level” y también quitamos el acceso de modificación al campo “Mobile”, dentro de “Contacts”



SETUP

Profiles

Authorization Form Data Uses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	D&B Companies	<input checked="" type="checkbox"/>					
Authorization Form Texts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Data Use Legal Bases	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Background Operations	<input type="checkbox"/>						Data Use Purposes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Brands	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscriptions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Engagement Channel Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Channel Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ideas	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Communication Subscription Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Individuals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Locations	<input type="checkbox"/>					
Contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Party Consents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Push Topics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

 SETUP

Individual	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Languages	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Modified By	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Stay-in-Touch Request Date	Date/Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Stay-in-Touch Save Date	Date/Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lead Source	Picklist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Level	Picklist	<input type="checkbox"/>	<input type="checkbox"/>
Mailing Address	Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mobile	Phone	<input type="checkbox"/>	<input type="checkbox"/>
Name	Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Other Address	Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Other Phone	Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Phone	Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Reports To	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Title	Text	<input type="checkbox"/>	<input type="checkbox"/>

Save **Cancel**

Crea un conjunto de permisos llamado “Usuario acceso administrativo”

En “Setup Quick Search bar” escribimos “permission sets” y lo seleccionamos cuando salga. En esta página seleccionamos “New” para crear un nuevo conjunto de permisos. Agregamos el nombre del conjunto de permisos “Usuario acceso administrativo” y ya creado buscamos en la lista el apartado que dice “Object Settings” y dentro de éste hacemos click en “Contacts” para luego editar y activar el acceso a modificar y ver “Level” “Title”, y “Mobile”.

 SETUP

Permission Sets

	Read	Write
Fax	<input type="checkbox"/>	<input type="checkbox"/>
Fax Opt Out	<input type="checkbox"/>	<input type="checkbox"/>
Home Phone	<input type="checkbox"/>	<input type="checkbox"/>
Individual	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Languages	<input type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Stay-in-Touch Request Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Stay-in-Touch Save Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lead Source	<input type="checkbox"/>	<input type="checkbox"/>
Level	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mailing Address	<input type="checkbox"/>	<input type="checkbox"/>
Mobile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Other Address	<input type="checkbox"/>	<input type="checkbox"/>
Other Phone	<input type="checkbox"/>	<input type="checkbox"/>
Phone	<input type="checkbox"/>	<input type="checkbox"/>
Reports To	<input type="checkbox"/>	<input type="checkbox"/>
Title	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Actualizar el perfil asignado a los usuarios creados previamente

- “Usuario 1” -> Perfil “Usuario acceso mínimo”
- “Usuario 2” -> Perfil “Usuario acceso estándar”
- “Usuario 3” -> Perfil “Usuario acceso estándar”

Nos dirigimos hacia “Users” y cambiamos cada perfil de usuario individualmente.



SETUP

Users

User Edit

user one

Help for this Page

User Edit

Save

Save & New

Cancel

General Information

= Required Information

First Name	<input type="text" value="user"/>
Last Name	<input type="text" value="one"/>
Alias	<input type="text" value="uone"/>
Email	<input type="text" value="userone@emailone.com"/>
Username	<input type="text" value="userone@emailone.com"/>
Nickname	<input type="text" value="User165286285282550605"/>
Title	<input type="text"/>
Company	<input type="text"/>
Department	<input type="text"/>
Division	<input type="text"/>

Role	<input type="text" value="CEO"/>
User License	<input type="text" value="Salesforce Platform"/>
Profile	<input type="text" value="Standard Platform User"/>
Active	<input type="checkbox"/> Standard Platform User <input type="checkbox"/> Usuario acceso estándar <input checked="" type="checkbox"/> Usuario acceso mínimo
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>

Asigna el conjunto de permisos “Usuario acceso administrativo” al “Usuario 3”

The screenshot shows a software interface for managing users. At the top, there is a header with a user icon, the word "SETUP", and the word "Users". Below the header, there is a table with various user details:

Fax	
Mobile	
Email Encoding	Unicode (UTF-8)
Employee Number	
Used Data Space	0 B [View]
Used File Space	0 B [View]
Last Login	
Last Password Change or Reset	Unknown
Failed Login Attempts	1
Individual	

Below the table, there are two lines of information:

Created By: [Edwin Isaac Estrada Rodríguez, 18/05/2022 03:34](#)

Modified By: [Edwin Isaac Estrada Rodríguez, 18/05/2022 12:58](#)

At the bottom of this section are four buttons: "Edit", "Sharing", "Reset Password", and "Freeze".

Below this section, there is a table titled "Permission Set Assignments" with a red border around it. The table has columns for "Action", "Permission Set Label", "Date Assigned", and "Expires On". There is one row in the table:

Action	Permission Set Label	Date Assigned	Expires On
Del	Usuario acceso administrativo	18/05/2022	

At the bottom of the "Permission Set Assignments" section, there is a link "Permission Set Assignments Help" with a question mark icon.

Below the "Permission Set Assignments" section, there is another section titled "Permission Set Assignments: Activation Required" with a red border around it. It contains the text "No records to display" and a link "Permission Set Assignments: Activation Required Help" with a question mark icon.

Observaciones al iniciar sesión como los usuarios

Usuario 1: Al buscar el objeto “Contacts” éste no se muestra debido a la configuración de perfil de usuario mínimo.

Usuario 2: Se puede acceder a los contactos y a sus registros, y debido a la configuración de usuario estándar, no se muestran ni el cargo ni el móvil, así tampoco su nivel.

Usuario 3: Este usuario tiene perfil estándar pero puede modificar los campos mencionados anteriormente debido a que tiene asignado un conjunto de permisos administrativos.

Sesión 02

Gestión de Usuarios.

Validar que es posible crear 4 usuarios con licencia “Salesforce Platform”.

Lanzamos nuevamente nuestra organización e ingresamos con el “administrador del sistema”.

Nos dirigimos a “Users”, picamos en “New” para crear un usuario con Licencia “Salesforce” y perfil “administrador del sistema”.

Hacemos click en cada uno de los usuarios creados en la sesión anterior y los desactivamos dando click en la casilla “active”.

Desactivar usuario.

User Edit
user one

Help for this Page 

User Edit Save Save & New Cancel

General Information = Required Information

First Name	user	Role	CEO
Last Name	one	User License	Salesforce Platform
Alias	uone	Profile	Usuario acceso mínimo
Email	userone@emailone.com	Active	<input checked="" type="checkbox"/>
Username	userone@emailone.com	Marketing User	<input type="checkbox"/>
Nickname	User165286285282550605	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>

Validar si se pueden crear 4 usuarios con licencia “Salesforce Platform”

Si se desactivan los usuarios anteriores se pueden crear nuevamente 3 usuarios máximo con perfil “Salesforce Platform”.
El desactivar los usuarios al parecer hace que vuelvan a estar disponibles las licencias.

New User Help f

User Edit Save Save & New Cancel

General Information = Required

First Name	<input type="text"/>	Role	<input type="text" value="<None Specified>"/>	i
Last Name	<input type="text" value="user6"/>	User License	<input type="text" value="Salesforce Platform"/>	i
Alias	<input type="text" value="user"/>	Profile	<input type="text" value="--None--"/>	i
Email	<input type="text" value="usersix@sixthemail.com"/>	Active	<input checked="" type="checkbox"/>	
Username	<input type="text" value="usersix@sixthemail.com"/>	Marketing User	<input type="checkbox"/>	
Nickname	<input type="text" value="User165305697986251330"/> i	Offline User	<input type="checkbox"/>	

Observaciones.

- Se pueden crear tantos usuarios con licencia “Salesforce” como sean necesarios, pero para crearlos podemos tener máximo 2 usuarios activados con licencia “Salesforce” para poder crear uno más.

User Edit

Save Save & New Cancel

General Information

First Name	<input type="text"/>	Role	<input type="text" value="<None Specified>"/>
Last Name	<input type="text" value="user5 user5"/>	User License	<input type="text" value="Salesforce Platform"/>
Alias	<input type="text" value="user5"/>	Profile	<input type="text" value="Usuario acceso estándar"/>
Email	<input type="text" value="user5@mail.com"/>	Active	<input checked="" type="checkbox"/>
Username	<input type="text" value="user5@mail.com"/>	Marketing User	<input type="checkbox"/>
Nickname	<input type="text" value="User165297966032766364"/>	Offline User	<input type="checkbox"/>

Configuración de la Colaboración predeterminada(Organization Wide Defaults - OWS) y creación de una Jerarquía de Funciones

- Ve a la configuración de colaboración predeterminada y define como “Privado” el comportamiento del objeto “Cuentas”.

The screenshot shows the 'Sharing Settings' page under 'SETUP'. The main title is 'Organization-Wide Sharing Defaults Edit'. Below it, a descriptive text states: 'Edit your organization-wide sharing defaults below. Changing these defaults will cause all sharing rules to be recalculated. This could require significant system resources and time depending on the amount of data in your organization. Setting an object to Private makes records visible to record owners and those above them in the role hierarchy, and access can be extended using sharing rules.' At the top right is a 'Help for this Page' link. The main table has columns: 'Object', 'Default Internal Access', 'Default External Access', and 'Grant Access Using Hierarchies'. The 'Object' column lists 'Lead', 'Account and Contract', and 'Order'. For 'Lead', 'Default Internal Access' is 'Public Read/Write/Transfer' and 'Default External Access' is 'Private'. For 'Account and Contract', both 'Default Internal Access' and 'Default External Access' are set to 'Private'. For 'Order', both are 'Controlled by Parent'. Each row has a 'Save' and 'Cancel' button at the top right. A red box highlights the 'Default External Access' dropdown for 'Account and Contract'.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Private	Private	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>

- Crea una jerarquía de funciones que represente la siguiente estructura:
Gerente

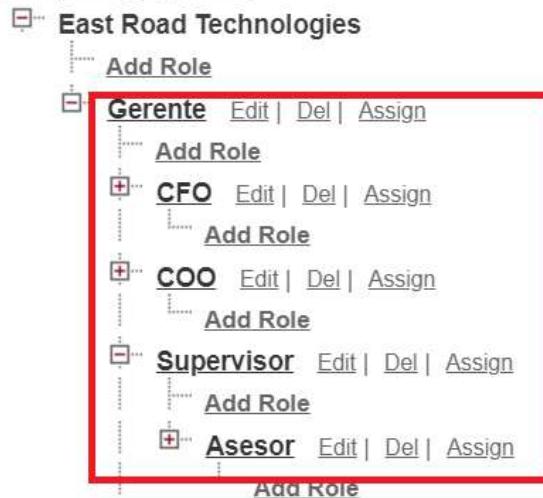
```
    Supervisor  
        Asesor
```

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role,

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)



Crear 3 registros por usuario en “Cuentas”.

1	<input type="checkbox"/> Comfortablest INC - User02	utwo
2	<input type="checkbox"/> Comfortabler INC - User02	utwo
3	<input type="checkbox"/> Comfortable INC - User02	utwo
4	<input type="checkbox"/> Sexiest INC - User03	uthre
5	<input type="checkbox"/> Sexier INC - User03	uthre
6	<input type="checkbox"/> Sexy INC - User03	uthre
7	<input type="checkbox"/> Luxuriest INC - User01	uone
8	<input type="checkbox"/> Luxurier INC - User01	uone
9	<input type="checkbox"/> Luxury INC - User01	uone

User01 Asesor

Solo puede ver sus propias cuentas

User02 Supervisor

Solo puede ver sus propias cuentas

User03 Gerente

Se pueden ver todas las cuentas creadas

Crea un grupo llamado “Gestion de Cuentas gerentes” que considere a los usuarios:

- * Usuario 2.
- * Usuario 3.

The screenshot shows the Salesforce Setup interface for managing Permission Set Groups. The title bar reads "Permission Set Groups". Below it, a section titled "Assignment Summary" displays the message "Gestion de Cuentas Gerentes" and a "Help for this Page" link. A green success message box states "Permission set group group Gestion de Cuentas Gerentes has been assigned to 2 users." The main table lists two users assigned to the group: "user_two" and "user_three", both with the "Salesforce Platform" license and a "Success" status message. A "Done" button is visible at the bottom of the table.

Full Name	Username	User License	Message
user_two	usertwo@emailtwo.com	Salesforce Platform	Success
user_three	userthree@mailthree.com	Salesforce Platform	Success

* Crea una regla de colaboración que permita que los miembros del Grupo “Gestión de Cuentas gerentes”, puedan ver y modificar los registros de cuentas de las que son propietarios los miembros del grupo.

The screenshot shows the 'Permission Set Groups' page in the Salesforce Setup. The header includes a user icon, 'SETUP', and the page title 'Permission Set Groups'. Below the title, it says 'Add Permission Sets to' and lists 'Gestion_de_Cuentas_Gerentes'. A green success message at the top states '1 permission set was added. Permissions update is complete once group status changes to Updated.' The main table has columns: 'Permission Set', 'License', 'Namespace', and 'Message'. One row is shown with the permission set name 'ver_y_modificar_cuentas', a 'Done' button, and a 'Message' column showing 'Success'. There is also a 'Done' button at the bottom of the table.

Usuario 02

Puede acceder a todas las cuentas creadas por los otros usuarios, siendo Otorgado el acceso gracias a que pertenece al mismo grupo que User03

Usuario 03

Puede acceder a todas las cuentas creadas por los otros usuarios

Sesión 03

Modelado de Datos.

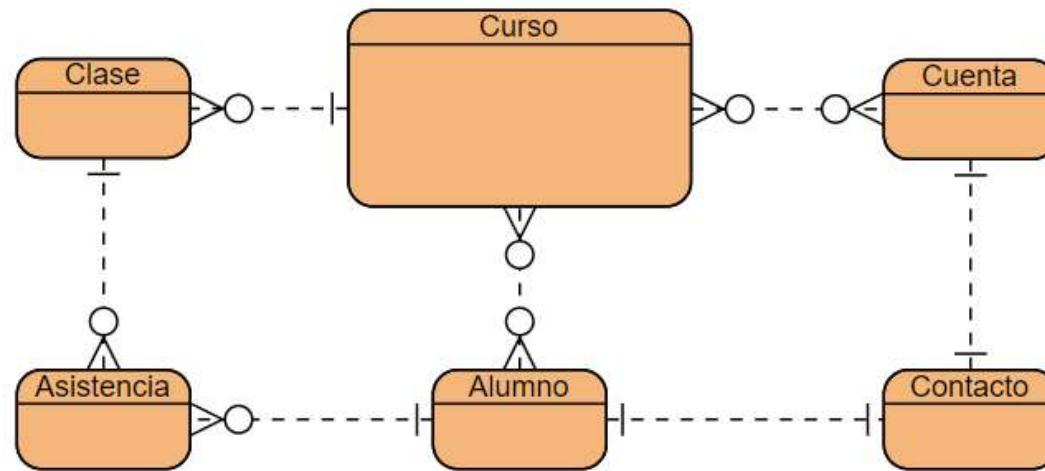
Nos permite crear registros de “Cursos” relacionados con clientes(Cuentas)

Nos permite registrar “Alumnos” y relacionarlos a registros nuevos o existentes de Contactos(Contacts)

Nos permite registrar “Clases” o “Sesiones” de esos “Cursos”

Nos permite registrar las “Asistencias” a la “Clase”

Nos permite visualizar un resumen de las asistencias por “Clase”



SETUP Object Manager

50+ Items, Sorted by Last Modified

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Inventario	Inventario_c	Custom Object		24/05/2022	✓
OpportunityLineItem	OpportunityLineItem_c	Custom Object		24/05/2022	✓
PriceBookEntry	PriceBookEntry_c	Custom Object		24/05/2022	✓
PriceBook	PriceBook_c	Custom Object		24/05/2022	✓
Opportunity	Opportunity_c	Custom Object		24/05/2022	✓
Product	Product_c	Custom Object		24/05/2022	✓

Opportunity Field Dependencies

Help for this Page 

[« Back to Custom Object: Opportunity](#)

This page allows you to define dependencies between fields (e.g., dependent picklists).

Field Dependencies [New](#)

Action	Controlling Field	Dependent Field	Modified By
Edit Del	StageName	Probability	Edwin Isaac Estrada Rodríguez, 24/05/2022 13:57

Product__c

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies S

FIELD LABEL	▲ FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Description	Description_c	Long Text Area(4000)		
IsActive	IsActive_c	Checkbox		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Product Name	Name	Text(80)		✓
ProductCode	ProductCode_c	Text(255)		

Opportunity__c

SETUP > OBJECT MANAGER

Opportunity

& Relationships

layouts

Record Pages

Links, and Actions

act Layouts

sets

Limits

Types

Lookup Filters

tion Rules

ng Rules

rs

tion Rules

Fields & Relationships

9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Account	Account_c	Lookup(Account)
CloseDate	CloseDate_c	Date
Created By	CreatedById	Lookup(User)
Description	Description_c	Text Area(255)
Last Modified By	LastModifiedById	Lookup(User)
Opportunity Name	Name	Text(80)
Owner	OwnerId	Lookup(User,Group)
Probability	Probability_c	Picklist
StageName	StageName_c	Picklist

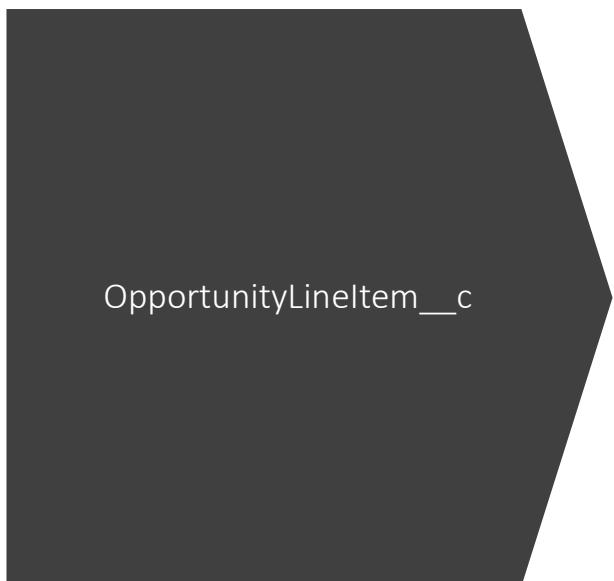
PriceBook__c

PriceBook

Fields & Relationships

6 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME
Created By	CreatedById
Description	Description_c
IsActive	IsActive_c
Last Modified By	LastModifiedById
Owner	OwnerId
PriceBook Name	Name



SETUP > OBJECT MANAGER

OpportunityLineItem

	Details	Fields & Relationships
	Fields & Relationships	13 items. Sorted by Field Label
	Page Layouts	Created By
	Lightning Record Pages	Description
	Buttons, Links, and Actions	Last Modified By
	Compact Layouts	ListPrice
	Field Sets	Opportunity
	Object Limits	OpportunityLineItem Name
	Record Types	Owner
	Related Lookup Filters	Product
	Restriction Rules	ProductCode
	Scoping Rules	Quantity
	Triggers	ServiceDate
	Validation Rules	TotalPrice
		UnitPrice

OpportunityLineItem__c

PriceBookEntry__c

Fields & Relationships	
	FIELD NAME
Created By	CreatedById
IsActive	IsActive__c
Last Modified By	LastModifiedById
Owner	OwnerId
PriceBook	PriceBook__c
PriceBookEntry Name	Name
Product	Product__c
ProductCode	ProductCode__c
Unit Price	Unit_Price__c

Inventario__c

SETUP > OBJECT MANAGER Inventario		
Details	Fields & Relationships 7 Items, Sorted by Field Label	
Fields & Relationships	FIELD LABEL	▲ FIELD NAME
Page Layouts	Cantidad Disponible	Cantidad_dis__c
Lightning Record Pages	Cantidad reservada	Cantidad_apart__c
Buttons, Links, and Actions	Codigo de Producto	CodigoProd__c
Compact Layouts	Created By	CreatedBy
Field Sets	Inventario Name	Name
Object Limits	Last Modified By	LastModifiedBy
Record Types	Owner	OwnerId
Related Lookup Filters		
Restriction Rules		
Scoping Rules		

Sesión 04

Gestión de Datos

Exportamos
cuentas originales
y cambiamos
nombres, algunos
ID se repiten.

	A	B	C	D
1	ACCOUNTNUMBER	ID	INDUSTRY	NAME
2		001IY000002Yp87YAC		A
3	CD451796	001IY000002Yp7vYAC	Electronics	B
4	CD656092	001IY000002Yp7wYAC	Apparel	C
5	CC213425	001IY000002Yp7xYAC	Construction	D
6	CC634267	001IY000002Yp7yYAC	Consulting	E
7	CD439877	001IY000002Yp7zYAC	Hospitality	F
8	CD355118	001IY000002Yp80YAC	Energy	G
9	CC947211	001IY000002Yp81YAC	Transportation	H
10	CD736025	001IY000002Yp82YAC	Education	I
11	CD355119-A	001IY000002Yp83YAC	Energy	J
12	CD355120-B	001IY000002Yp84YAC	Energy	K
13	CC978213	001IY000002Yp85YAC	Biotechnology	L
14		001IY000002Yp86YAC		M
15		001IY000002bGAUYA2		N
16		001IY000002bDvmYAE		O
17		001IY000002ahVfyAI		P
18		001IY000002ahW4YAI		Q
19		001IY000002ahKfyAY		R
20		001IY000002ahf6YAA		S
21		001IY000002ahVkyAI		T
22		001IY000002ahYeYAI		U
23		001IY000002ahheSYAQ		V
24		001IY000002ahdeYAA		W

Asignamos External_ID al ID

The screenshot shows the 'Load Inserts' interface in Salesforce. The title bar says 'Load Inserts'. The main area is titled 'Step 3: Mapping' with the sub-instruction 'Map your fields (CSV columns) to the Salesforce object.' A large blue Salesforce logo is in the top right. Below the title, there are two buttons: 'Choose an Existing Map' and 'Create or Edit a Map'. A table titled 'Current Field Mappings:' shows the mapping between CSV columns and Salesforce fields:

File Column Header	Name
ID	External_ID_c
INDUSTRY	Industry
ACCOUNTNUMBER	AccountNumber
NAME	Name

At the bottom are navigation buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

Sin errores

The dialog box is titled 'Operation Finished' with a blue cloud icon. The message inside says 'The operation has fully completed. There were 72 successful inserts and 0 errors.' At the bottom are three buttons: 'View Successes', 'View Errors', and 'OK'.

Importando contactos

CSV Viewer

Row Number	ID	FIRSTNAME	LASTNAME	MOBILEPHONE	STATUS
1	003IY000001tV1BYAU	Rose	Gonzalez	(512) 757-9340	Item Created
2	003IY000001tV1CYAU	Sean	Forbes	(512) 757-4561	Item Created
3	003IY000001tV1DYAU	Jack	Rogers		Item Created
4	003IY000001tV1EYAU	Pat	Stumuller	(014) 454-6364	Item Created
5	003IY000001tV1FYAU	Andy	Young	(785) 265-53501	Item Created
6	003IY000001tV1GYAU	Tim	Barr	(312) 596-1230	Item Created
7	003IY000001tV1HYAU	John	Bond	(312) 596-1563	Item Created
8	003IY000001tV1IYAU	Stella	Pavlova	(212) 842-5501	Item Created
9	003IY000001tV1JYAU	Lauren	Boyle	(212) 842-5611	Item Created
10	003IY000001tV1KYAU	Babara	Levy	(503) 421-5451	Item Created
11	003IY000001tV1LYAU	Josh	Davis	(503) 421-4387	Item Created
12	003IY000001tV1MYAU	Jane	Grey	(520) 773-4539	Item Created
13	003IY000001tV1NYAU	Arthur	Song	(212) 842-4535	Item Created
14	003IY000001tV1OYAU	Ashley	James	+44 191 3456234	Item Created

Operation Finished

The operation has fully completed. There were 53 successful inserts and 0 errors.

[View Successes](#) [View Errors](#) [OK](#)

Creamos un custom formula field en el objeto contactos, cuya formula regrese un texto con el campo Account.External_ID__c

Contact

Contact New Custom Field Help for this Page

Step 3. Enter formula Step 3 of 5

Previous Next Cancel

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: Full Name = LastName & ", " & FirstName [More Examples...](#)

Simple Formula Advanced Formula

Insert Field Insert Operator Functions

External_ID (Text) =

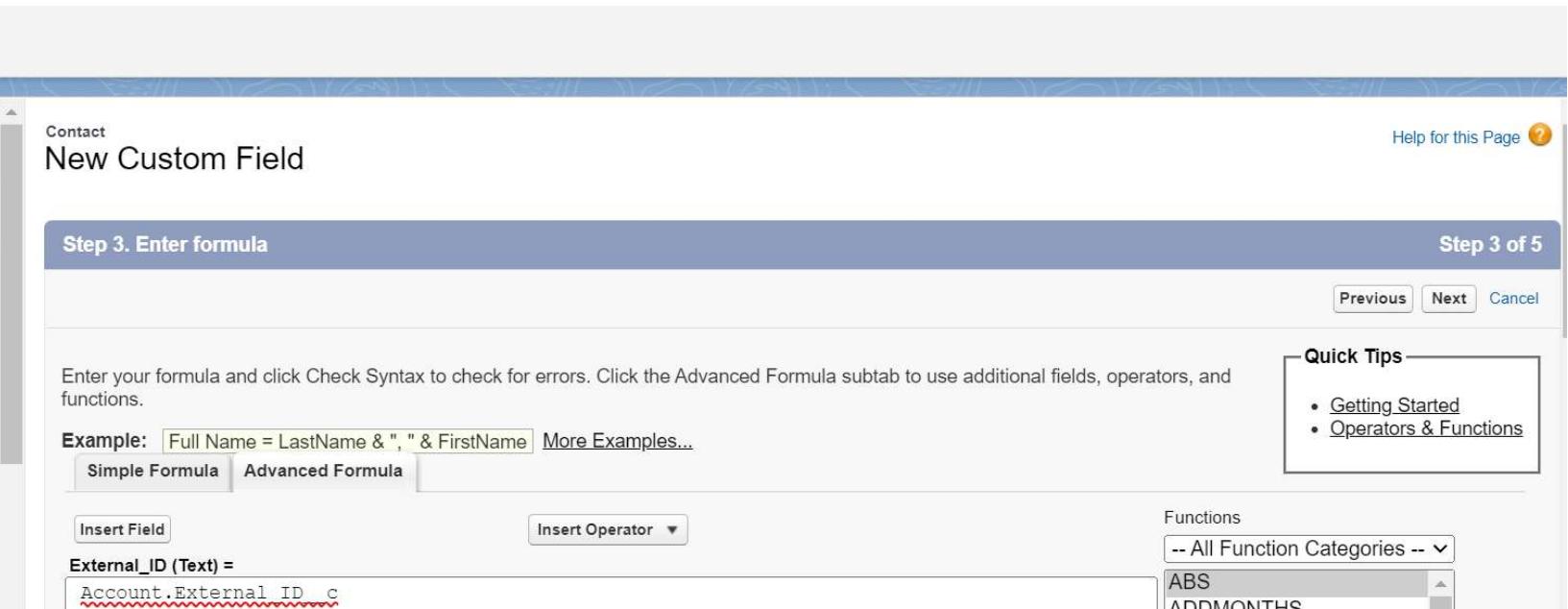
Account.External_ID__c

-- All Function Categories --

ABS ADDMONTHS

Quick Tips

- Getting Started
- Operators & Functions



Relación entre Contact y Account a través de External_ID__c

Contact
Mr. Andy Young

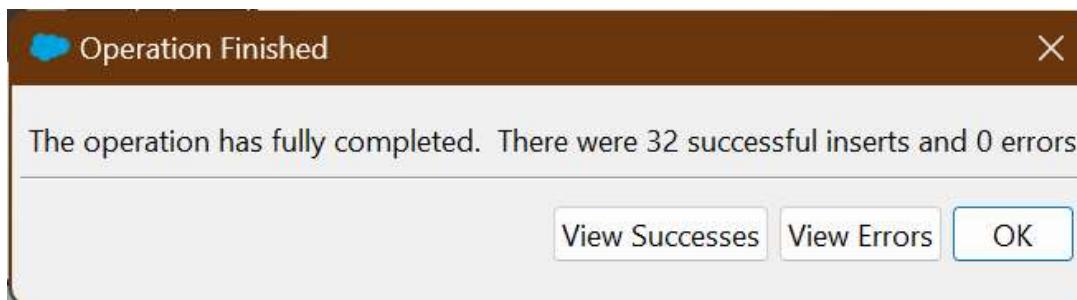
Account Name	<input type="text"/>
Title	<input type="text"/>
Department	<input type="text"/>
Reports To	<input type="text"/>
Lead Source	<input type="text"/>
Account	Edge Communications
External_ID	7j8m97890

Account
Edge Communications

Account Site	<input type="text"/>
Type	Customer - Direct
Industry	Electronics
Annual Revenue	\$139,000,000
utilidades	\$139,000.00
antigüedad	7.47
External ID	7j8m97890

- Realizar una “carga inicial” de registros de Products__c, Pricebook__c y PriceBookEntry__c, implementando los campos de Id. Externo (para uso en la funcionalidad de Oportunidades personalizadas). Carga mínima de 25 registros.

Importamos los registros hacia Products, Pricebook y PriceBookEntry.



Products

CSV Viewer

Row Number	ID	DESCRIPTION_C	EXTERNAL_ID_C	ID	NAME	STATUS
1	a05IY000000G3a8YAC	descripcion 1	235490nfg	a05IY000000G3a8YAC	objeto 1	Item Created
2	a05IY000000G3a9YAC	descripcion 2	234jm9c79	a05IY000000G3a9YAC	objeto 2	Item Created
3	a05IY000000G3aAYAS	descripcion 3	b623brth	a05IY000000G3aAYAS	objeto 3	Item Created
4	a05IY000000G3aBYAS	descripcion 4	vw45s	a05IY000000G3aBYAS	objeto 4	Item Created
5	a05IY000000G3aCYAS	descripcion 5	245y 2345yb	a05IY000000G3aCYAS	objeto 5	Item Created
6	a05IY000000G3aDYAS	descripcion 6	ujio	a05IY000000G3aDYAS	objeto 6	Item Created
7	a05IY000000G3aFYAS	descripcion 7	rtyb245	a05IY000000G3aFYAS	objeto 7	Item Created
8	a05IY000000G3aFYAS	descripcion 8	e5rtyb4526	a05IY000000G3aFYAS	objeto 8	Item Created
9	a05IY000000G3aGYAS	descripcion 9	23456b1234b	a05IY000000G3aGYAS	objeto 9	Item Created
10	a05IY000000G3aHYAS	descripcion 10	2345b1234b	a05IY000000G3aHYAS	objeto 10	Item Created
11	a05IY000000G3aIYAS	descripcion 11	2345b1234b5	a05IY000000G3aIYAS	objeto 11	Item Created
12	a05IY000000G3aJYAS	descripcion 12	12345b1234b	a05IY000000G3aJYAS	objeto 12	Item Created
13	a05IY000000G3aKYAS	descripcion 13	n556n3	a05IY000000G3aKYAS	objeto 13	Item Created
14	a05IY000000G3aLYAS	descripcion 14	rtynerwet	a05IY000000G3aLYAS	objeto 14	Item Created

To open the CSV in the associated external program such as Microsoft Excel, click the button below.

[Open in external program](#) [Close](#)

PriceBook

Operation Finished

The operation has fully completed. There were 29 successful inserts and 0 errors.

[View Successes](#) [View Errors](#) [OK](#)

CSV Viewer

Add inserts

Row Number	ID	EXTERNAL_ID_C	NAME	STATUS
1	a07IY0000008rvBYAQ	j890'34fg	PriceBook1	Item Created
2	a07IY0000008rvCYAQ	2345g	PriceBook2	Item Created
3	a07IY0000008rvDYAQ	567n3	PriceBook3	Item Created
4	a07IY0000008rvEYAQ	w45g6b	PriceBook4	Item Created
5	a07IY0000008rvFYAQ	q34c5	PriceBook5	Item Created
6	a07IY0000008rvGYAQ	23v45	PriceBook6	Item Created
7	a07IY0000008rvHYAQ	34c5v6	PriceBook7	Item Created
8	a07IY0000008rvIYAQ	34v6b7	PriceBook8	Item Created
9	a07IY0000008rvJYAQ	456b78	PriceBook9	Item Created
10	a07IY0000008rvKYAQ	567n89	PriceBook10	Item Created
11	a07IY0000008rvLYAQ	67n89	PriceBook11	Item Created
12	a07IY0000008rvMYAQ	456b78	PriceBook12	Item Created
13	a07IY0000008rvNYAQ	2345v7	PriceBook13	Item Created
14	a07IY0000008rvOYAQ	2v345	PriceBook14	Item Created

To open the CSV in the associated external program such as Microsoft Excel, click the button below

[Open in external program](#) [Close](#)

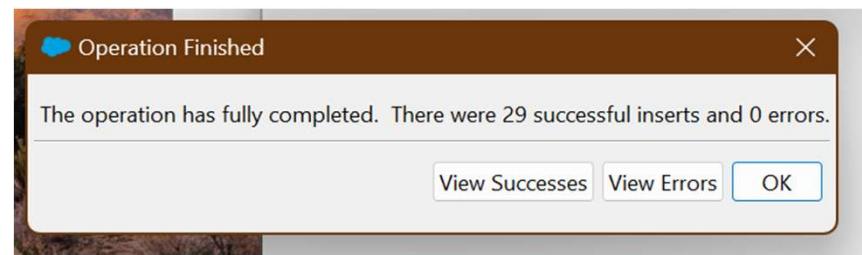
PriceBookEntry

CSV Viewer

Row Number	ID	EXTERNAL_ID_C	NAME	STATUS
1	a08IY000000D2hYYAS	j890'34fg	PriceBook1	Item Created
2	a08IY000000D2hZYAS	2345g	PriceBook2	Item Created
3	a08IY000000D2haYAC	567n3	PriceBook3	Item Created
4	a08IY000000D2hbYAC	w45g6b	PriceBook4	Item Created
5	a08IY000000D2hcYAC	q34c5	PriceBook5	Item Created
6	a08IY000000D2hdYAC	23v45	PriceBook6	Item Created
7	a08IY000000D2heYAC	34c5v6	PriceBook7	Item Created
8	a08IY000000D2hfYAC	34v6b7	PriceBook8	Item Created
9	a08IY000000D2hgYAC	456b78	PriceBook9	Item Created
10	a08IY000000D2hhYAC	567n89	PriceBook10	Item Created
11	a08IY000000D2hiYAC	67n89	PriceBook11	Item Created
12	a08IY000000D2hjYAC	456b78	PriceBook12	Item Created
13	a08IY000000D2hkYAC	2345v7	PriceBook13	Item Created
14	a08IY000000D2hlYAC	2v345	PriceBook14	Item Created
15	a08IY000000D2hmYAC	2v345	PriceBook15	Item Created
16	a08IY000000D2hnYAC	356b78	PriceBook16	Item Created
17	a08IY000000D2hoYAC	467n8	PriceBook17	Item Created
18	a08IY000000D2hpYAC	56n89	PriceBook18	Item Created

To open the CSV in the associated external program such as Microsoft Excel, click the button below.

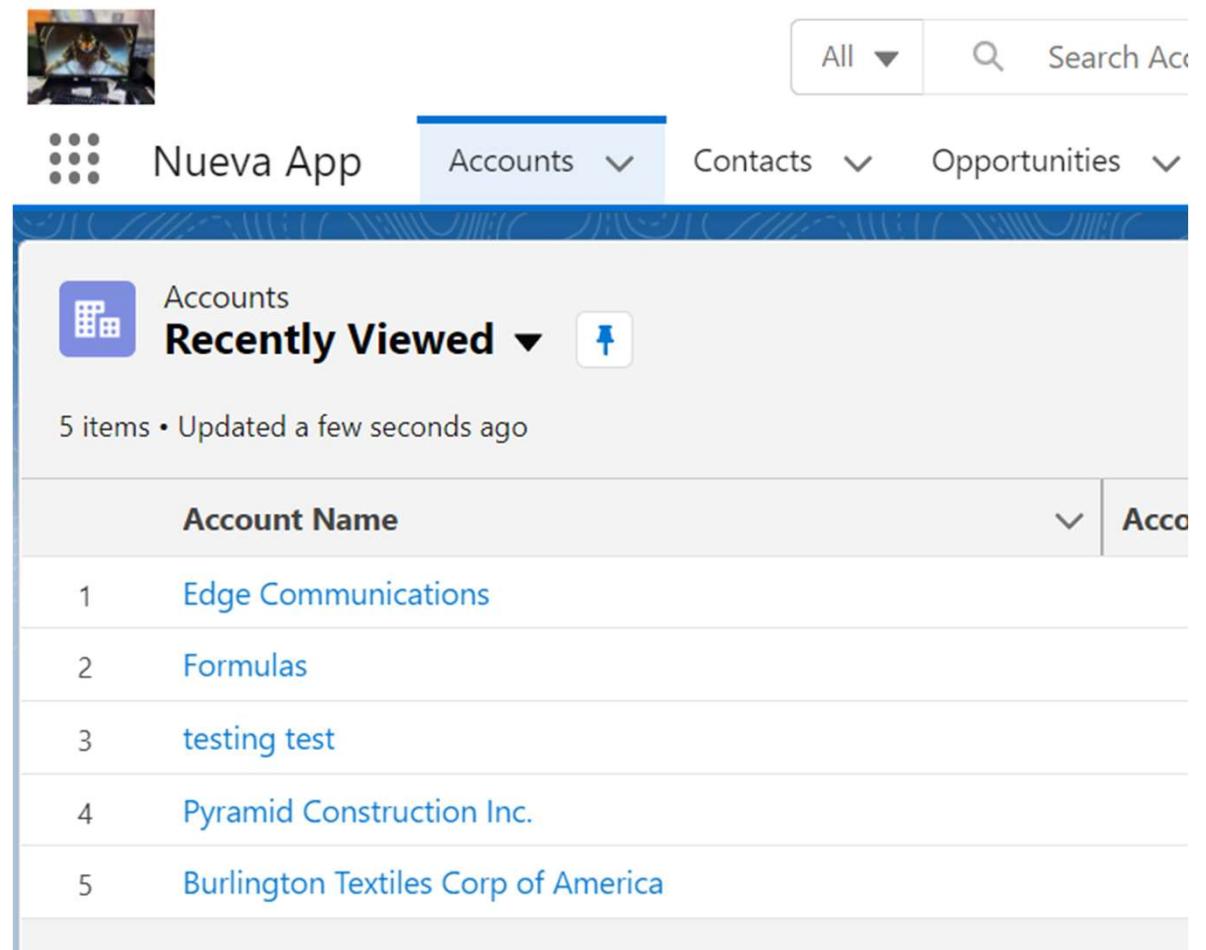
[Open in external program](#) [Close](#)



Sesión 05

Lightning experience

Crea una nueva App y
agrega las fichas
correspondientes:
Cuentas
Contactos
Oportunidades(Custom)



The screenshot shows a custom application interface titled "Nueva App". The top navigation bar includes "All", a search bar, and tabs for "Accounts", "Contacts", and "Opportunities". Below the navigation is a section titled "Recently Viewed" under "Accounts", which lists five recently viewed accounts: Edge Communications, Formulas, testing test, Pyramid Construction Inc., and Burlington Textiles Corp of America.

Account Name
1 Edge Communications
2 Formulas
3 testing test
4 Pyramid Construction Inc.
5 Burlington Textiles Corp of America

Usuario 1 No puede agregar la dirección a la hora de crear un nuevo record.

Podemos observar que para usuario 2 esto sí es posible.

Logged in as user one (userone@emailone.com) Log out as user one

Annual Revenue SIC Code
External ID SIC Description

Additional Information

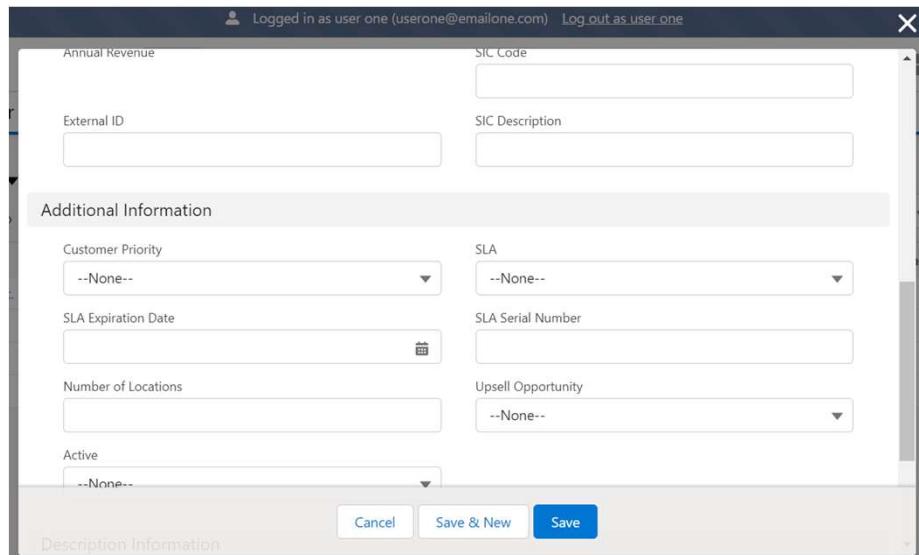
Customer Priority SLA
--None-- --None--

SLA Expiration Date SLA Serial Number

Number of Locations Upsell Opportunity
--None-- --None--

Active

Description Information



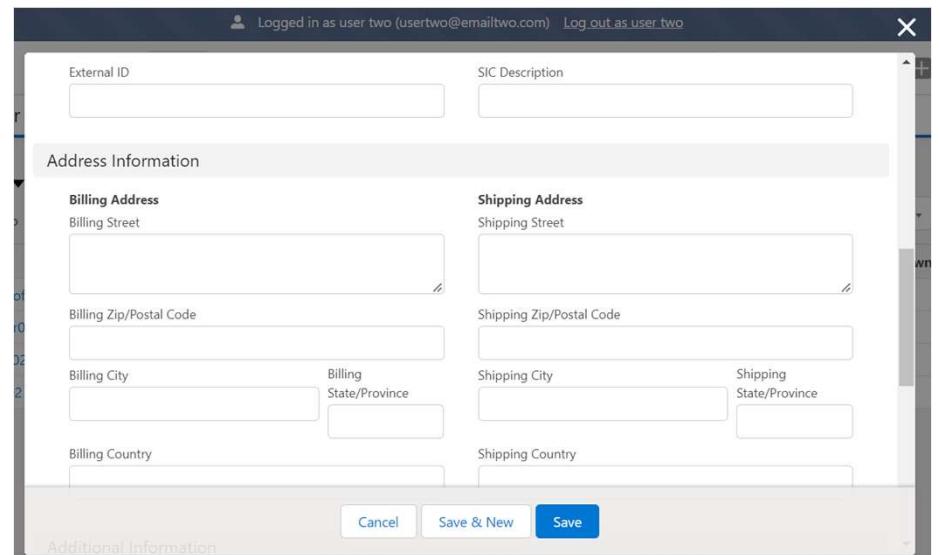
Logged in as user two (usertwo@emailtwo.com) Log out as user two

External ID SIC Description

Address Information

Billing Address
Billing Street
Billing Zip/Postal Code
Billing City Billing State/Province
Billing Country

Shipping Address
Shipping Street
Shipping Zip/Postal Code
Shipping City Shipping State/Province
Shipping Country



Crear dos nuevos tipos de registro de Oportunidades y asignarles el mismo formato de página.

The screenshot shows the Salesforce interface for managing Record Types. The left sidebar has links for Home, Objects & Relationships, Layouts, Record Pages, and Links, and Actions. The main content area is titled "Opportunity" and displays "Record Types". It shows two items: "Negocio A" and "Negocio B". Both records were created by "Edwin Isaac Estrada Rodríguez" on "26/05/2022 13:47".

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Negocio A		✓	Edwin Isaac Estrada Rodríguez, 26/05/2022 13:47
Negocio B		✓	Edwin Isaac Estrada Rodríguez, 26/05/2022 13:48

Para los nuevos tipos de registro de la Oportunidad, defina los valores disponibles del campo de lista de selección “StageName” como se indica

Negocio A

Opportunity

Field Label	StageName
Record Type	Negocio A

Picklist Values

Select an item from the Available Values list and add it to the Selected remove it from any existing records. Finally, select a default picklist val

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

Add Remove

Negocio B

Opportunity

Field Label	StageName
Record Type	Negocio B

Picklist Values

Select an item from the Available Values list and add it to the Selected remove it from any existing records. Finally, select a default ;

Available Values	Selected Values
--None--	Prospecting Qualification Needs Analysis Value Proposition Id. Decision Makers Perception Analysis Proposal/Price Quote Negotiation/Review Closed Won Closed Lost

Add Remove

Sesión 06

Implementación de la lógica de negocio I

- Crear un campo fórmula que muestre la valoración de la Cuenta en los registros de opportunity__c y valida cuando se presentan valores en blanco o nulos. Nombre del campo: Valoración de la cuenta.

Opportunity	oportunité
Edwin Isaac Estrada Rodríguez	
Private	
<input type="checkbox"/>	
Opportunity Name	
oportunité	
Account Name	
Comfortable INC - User02	
Type	
Lead Source	
Expected Revenue	
Close Date	
27/05/2022	
Next Step	
idk	
Stage	
Value Proposition	
Probability (%)	
50 %	
Account Rating	

Crear un campo de resumen de la suma del precio total de los Productos de Oportunidad “Custom”(OpportunityLineItem__c). Nombre del campo: Monto total

Opportunity

& Relationships

Layouts

Record Pages

Links, Links, and Actions

Object Layouts

Sets

Limit

Type

Lookup Filters

Step 3. Define the summary calculation

Select Object to Summarize

Master Object: Opportunity

Summarized Object: Opportunity Product

Select Roll-Up Type

COUNT

SUM

MIN

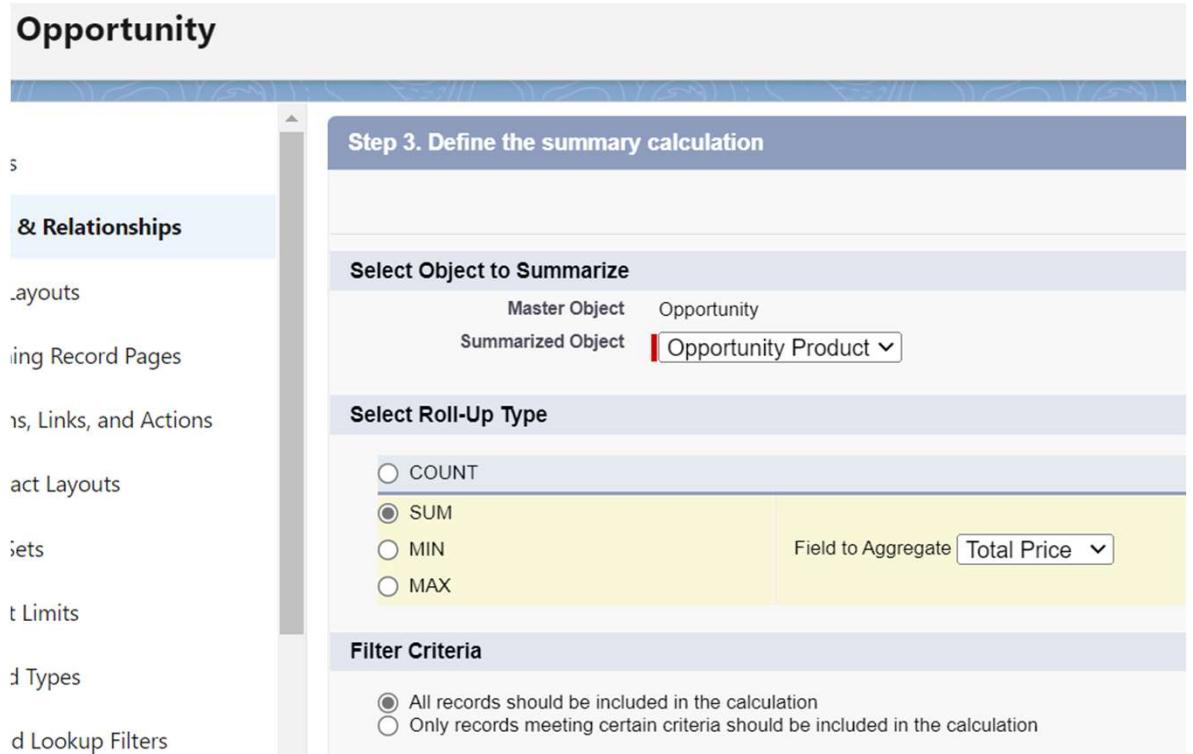
MAX

Field to Aggregate: Total Price

Filter Criteria

All records should be included in the calculation

Only records meeting certain criteria should be included in the calculation



Crear un campo fórmula donde muestre el valor esperado de la Oportunidad "Custom"(Opportunity__c), haciendo uso del campo de Probabilidad y el campo de resumen Monto total.
Nombre del campo: Monto esperado

SETUP > OBJECT MANAGER

Opportunity

New Custom Field

Step 3. Enter formula

Enter your formula and click Check Syntax to check for errors. Click functions.

Example: Gross Margin = Amount - Cost __c [More Examples...](#)

Simple Formula Advanced Formula

Select Field Type Insert Field

Opportunity -- Insert Merge Field --

Expected Amount (Currency) =

Probability * Total Sum __c

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various object settings like Fields & Relationships, Layouts, Record Pages, Buttons, Links, and Actions, and Visualforce Layouts. The main area is titled 'Opportunity New Custom Field' and is in 'Step 3. Enter formula'. It includes a text input field with an example formula 'Gross Margin = Amount - Cost __c' and a link to 'More Examples...'. Below the input field are tabs for 'Simple Formula' and 'Advanced Formula'. At the bottom, there are dropdown menus for 'Select Field Type' (set to 'Opportunity') and 'Insert Field' (set to '-- Insert Merge Field --'). A formula editor at the bottom shows the formula 'Expected Amount (Currency) = Probability * Total Sum __c'.

- Crear una regla de validación que no permite modificar el registro de la Oportunidad “custom” cuando se encuentre en la Etapa de ‘Closed Won’ o ‘Closed Lost’

SETUP > OBJECT MANAGER

Opportunity

The screenshot shows the Opportunity Validation Rule configuration page. The sidebar on the left lists various object settings like Fields & Relationships, Layouts, Record Pages, Buttons, Links, and Actions, Default Layouts, Sets, Record Limits, and Field Types. The main content area displays the validation rule details:

Validation Rule Detail

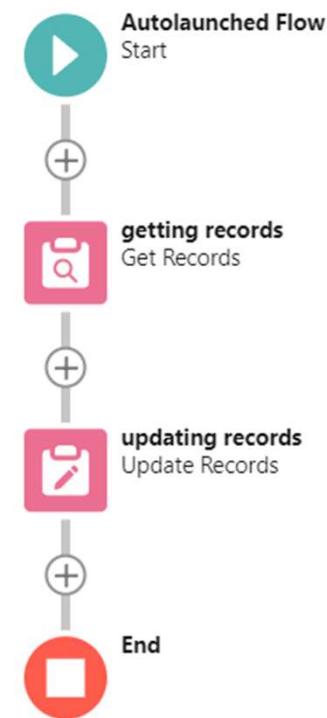
Rule Name	validar_si_closed
Error Condition Formula	OR(ISPICKVAL(PRIORVALUE(StageName), 'Closed Won'), ISPICKVAL(PRIORVALUE(StageName), 'Closed Lost'))
Error Message	ERROR CANNOT CHANGE AFTER CLOSED
Description	
Created By	Edwin Isaac Estrada Rodríguez , 30/05/2022 12:43

[Edit](#) [Clone](#)

Sesión 07

Implementación de la lógica de negocio II

- Crear un nuevo Flujo llamado “Asigna Precio de Lista”, que actualice el valor del campo de ListPrice y Unit Price del objeto Opportunity Line Item(Custom)(OpportunityLineItem__c), basado en el valor del campo de Unit Price del objeto Price Book Entry(Custom)(PriceBookEntry__c). Considera que el Flow debe ser ejecutado desde un Proceso(Process Builder) y debe tener como entrada los campos necesarios para realizar la consulta de los registros necesarios correspondientes(Código de Producto(de la relación del Opportunity Line Item(Custom), Id del registro de Opportunity Line Item(Custom) recientemente modificado, y el Id del registro de Price Book(Custom) definido en el registro padre de Opportunity(Custom)).



Get records process

Edit Get Records

Find Salesforce records and store their field values in flow variables.

get price (get_price)

Get Records of This Object

* Object

Filter PriceBookEntry Records

With no conditions, the flow retrieves **all** PriceBookEntry records.

Condition Requirements

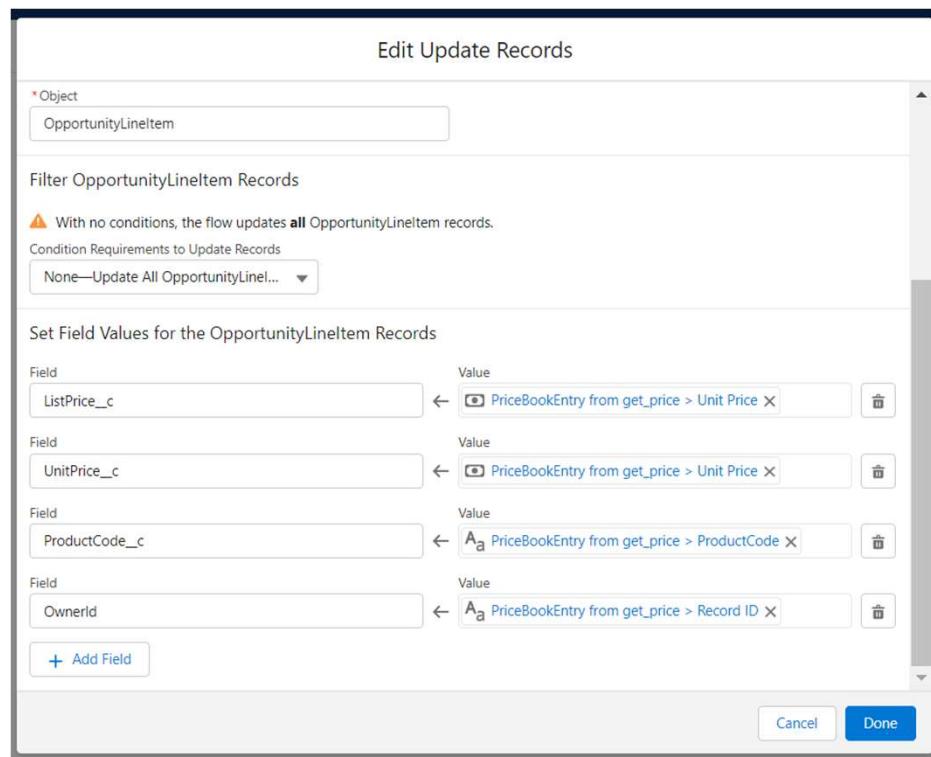
Sort PriceBookEntry Records

Sort Order If you store only the first record, filter by a unique field, such as ID.

How Many Records to Store

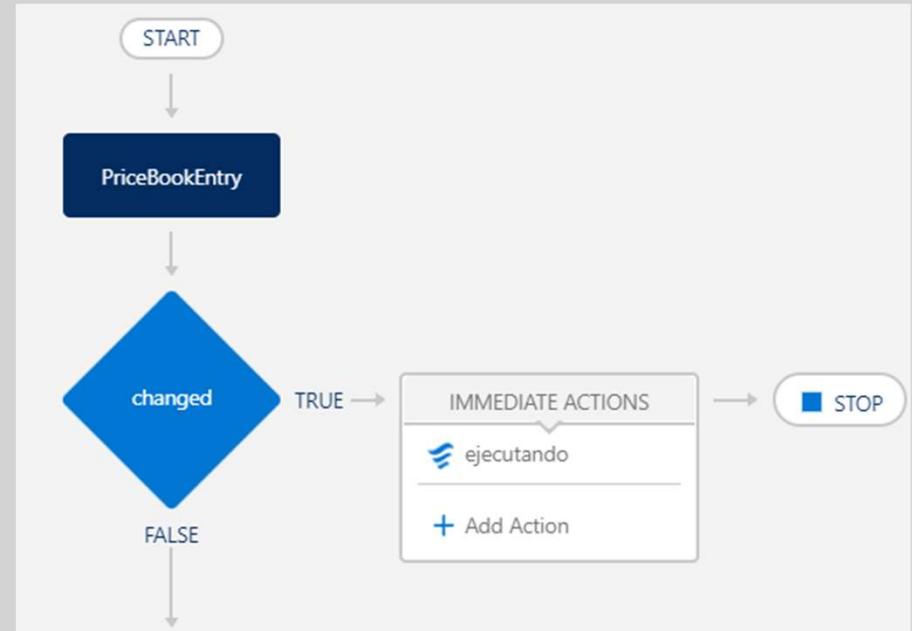
Only the first record
 All records

Update records



Proceso que ejecuta el flow

- Crear un nuevo Proceso(Process Builder) que detecte cuando se ha creado y/o modificado un registro de Producto de Oportunidad(OpportunityLineItem__c), específicamente al cambio de Producto, considerando el campo de Lista de Precios(campo de relación a PriceBook__c, presente en el registro padre de Oportunidad(Custom)(Opportunity)) y que ejecute un Flujo(Flow Builder) llamado “Asigna Precio de Lista” enviando los parámetros/variables correspondientes para lograr esta asignación/actualización(Id. de la Lista de Precios, Id. del registro de Producto de Oportunidad, Código de Producto).



Sesión 08

Reportes y tableros

- Crea un reporte que agrupe los registros de Oportunidades(Opportunity__c), por Etapa, por Propietario y por Fecha de Cierre (haciendo que la fecha de cierre se considere por mes), agregar el filtro de que sólo se puedan ver las Oportunidades con fecha de cierre de los últimos 3 meses.
- Nombre del Reporte:
Oportunidades del trimestre

The screenshot shows the Salesforce interface for creating a report. On the left, a report titled "Trimester Opportunities" is displayed with a "Filters" section containing three grouped filters: "Opportunity Owner", "Close Date", and "Stage". A red circle highlights the "Close Date" filter. On the right, a modal dialog titled "Filter by Close Date" is open, showing a date range from "Last 90 Days (3 Mar 2022 - 31 May 2022)". A red circle highlights the "Last 90 Days" option. The "Apply" button at the bottom right of the dialog is also circled in red.

Add filter... X

Show Me
All opportunities

Close Date
Last 90 Days (3 Mar 2022 - 31 May 2022)

Opportunity Status
Any

Probability
All

Filter by Close Date X

Date

Close Date

Range

Last 90 Days

3 Mar 2022 - 31 May 2022 Customize

Cancel Apply

Trimester Opportunities Oppos

Filters 1

Groups

GROUP ROWS

Opportunity Owner X

Close Date X

Stage X

- Crea un reporte donde se identifiquen las Oportunidades que se han cerrado ganadas recientemente (últimos 6 meses) para validar el volumen de la tendencia mensual.
- Nombre del Reporte: Oportunidades cerradas en el semestre.

REPORT ▾

Oportunidades cerradas en el semestre. [Edit](#) [Opportunities](#)

Fields

Filters 1

Filters

Add filter... [🔍](#)

Show Me
All opportunities

Close Date
Current FQ (1 Apr 2022 - 30 Jun 2022)

Opportunity Status
Any

Probability
All

Previewing a limited number of records. Run the report

Owner Role [▼](#) Opportunity Owner [▼](#)

Filter by Close Date

Date
Close Date

Range
Current and Previous CQ

1 Jan 2022 - 30 Jun 2022 [Customize](#)

[Cancel](#) [Apply](#)

APLAUSOS

APLAUSOS

APLAUSOS

GRACIAS!

APLAUSOS

APLAUSOS

APLAUSOS