Salesforce Administrator

salesforce

Session #1

Lets Get Started

- Let us Have A Quick Introduction
- Just Your Name, Total Experience
- Have You Worked on Salesforce Earlier ?
- Expectation from this Course !

Exam Outline

- Organizational Setup: 3%
- User Setup: 7%
- Security and Access: 13%
- Standard and Custom Objects: 14%
- Sales and Marketing Applications: 14%
- Service and Support Applications: 13%
- Activity Management and Collaboration: 3%
- Data Management: 10%
- Analytics—Reports and Dashboards: 10%
- Workflow/Process Automation: 8%
- Desktop and Mobile Administration: 3%
- AppExchange: 2%

Before we start, we must need to create a developer Org for practice purpose

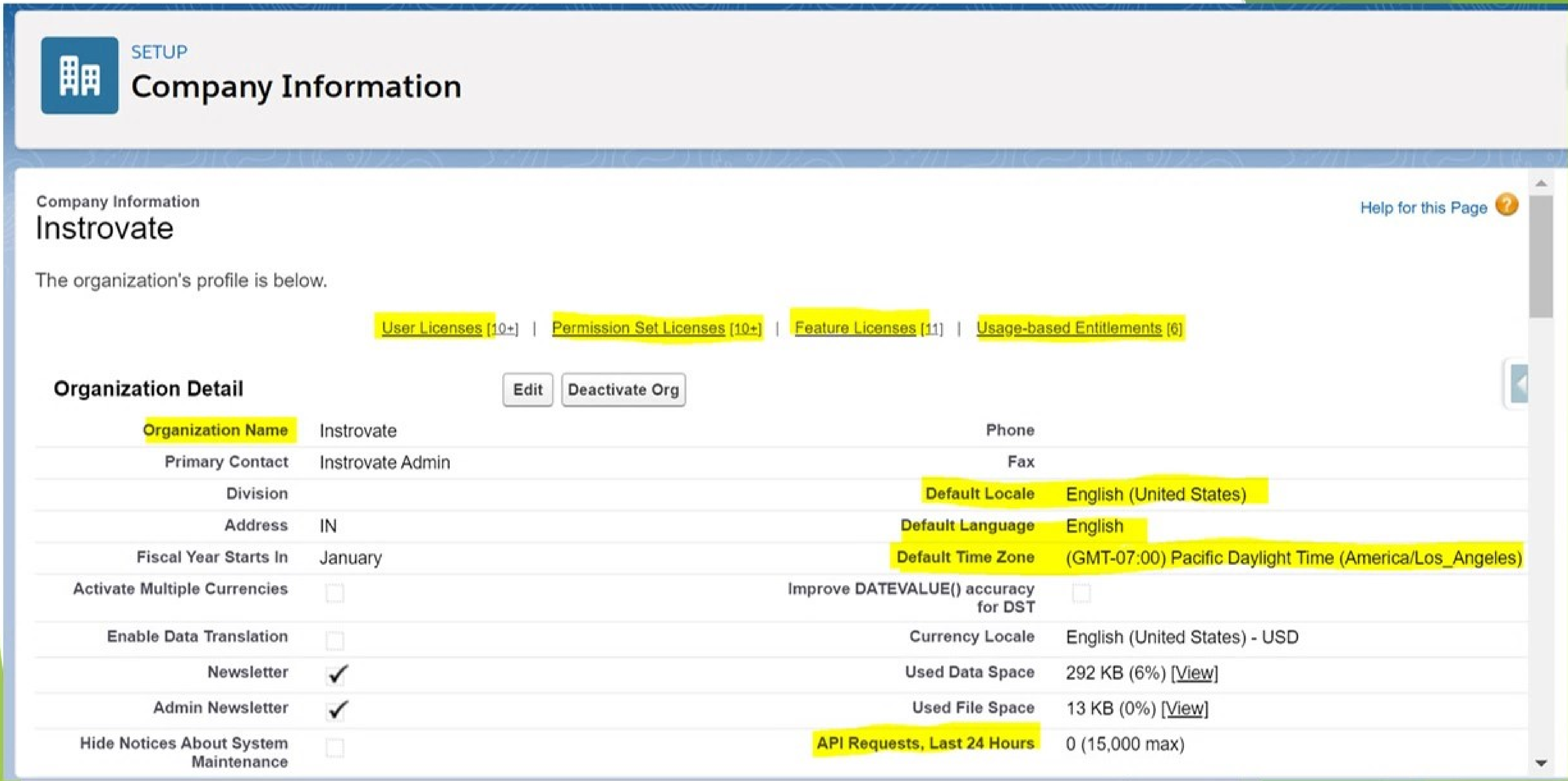
Link to create a developer Org :- https://developer.salesforce.com

1. Organizational Setup: 3%

- Describe the information found in the company settings (for example, fiscal year, business hours, currency management, default settings).

- Distinguish between the various UI features that an administrator controls, including the implications (for example, UI settings, search settings, list views, homepage layouts).

Link:- https://sforce.co/3j5KG1G


SETUP
Company Information
Company Information
Instrovate
Help for this Page
The organization's profile is below.
User Licenses [10+] | Permission Set Licenses [10+] | Feature Licenses [11] | Usage-based Entitlements [6]
Organization Detail
Edit
Deactivate Org
Organization Name Instrovate
Phone
Primary Contact Instrovate Admin
Fax
Division
Default Locale English (United States)
Address IN
Default Language English
Fiscal Year Starts In January
Default Time Zone (GMT-07:00) Pacific Daylight 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 292 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)

2. User Setup: 7%

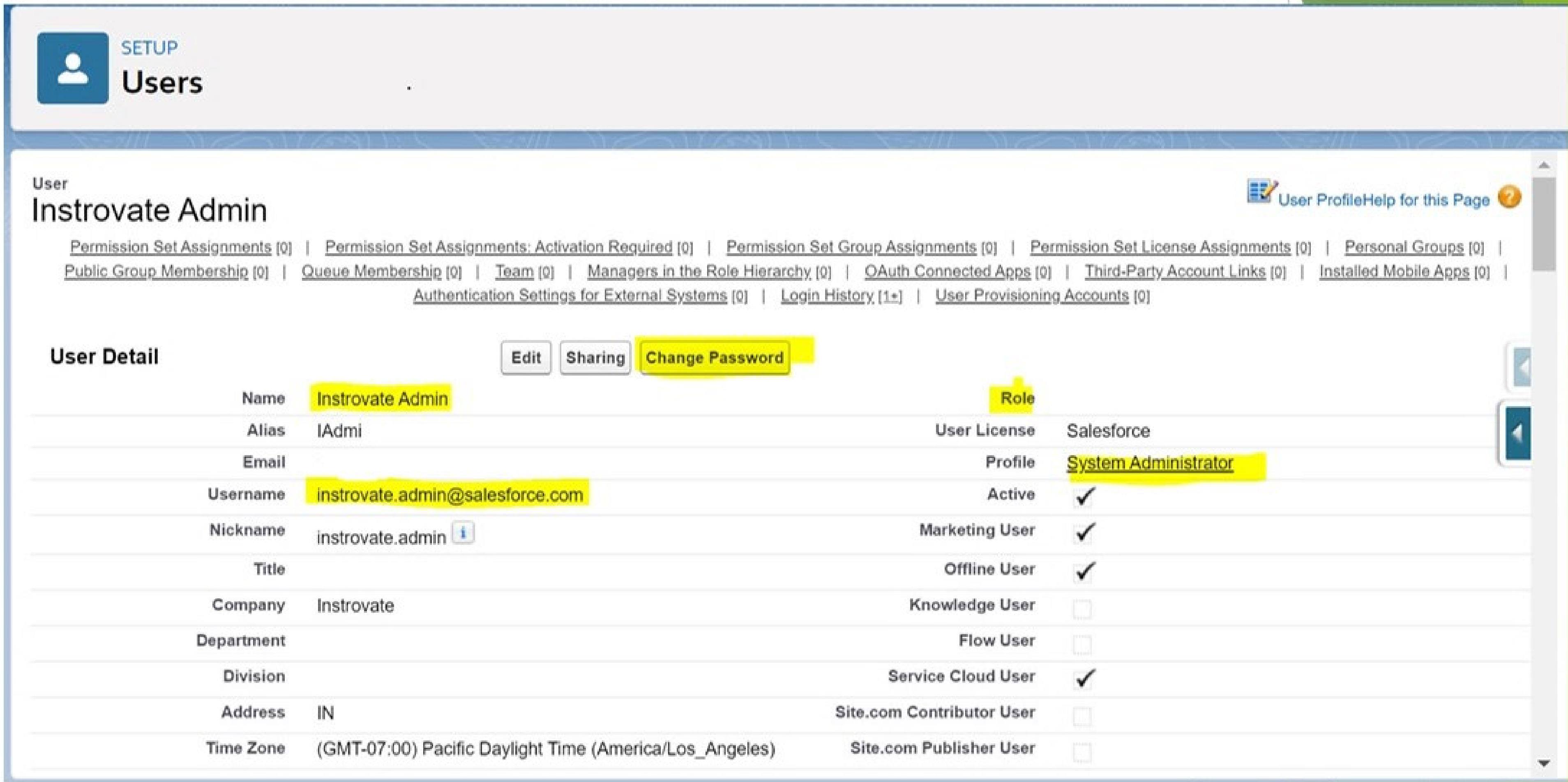
- Identify the steps to set up and/or maintain a user (for example, assign licenses, reset passwords, and resolve locked user accounts).
- Understand the implications of activating, deactivating, or freezing a user.

What is a user?

- A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records.

- Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access. Each user account contains at least the following:

1. Username
2. Email Address
3. User's First and Last Name
4. License
5. Profile
6. Role (optional)


SETUP
Users
User
Instrovate Admin
User ProfileHelp for this Page
Permission Set Assignments [0] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] |
Public Group Membership [0] | Queue Membership [0] | Team [0] | Managers in the Role Hierarchy [0] | OAuth Connected Apps [0] | Third-Party Account Links [0] | Installed Mobile Apps [0] |
Authentication Settings for External Systems [0] | Login History [1+] | User Provisioning Accounts [0]
User Detail
Edit
Sharing
Change Password
Name
Instrovate Admin
Role
Alias
IAdmi
User License
Salesforce
Email
Profile
System Administrator
Username
instrovate.admin@salesforce.com
Active
Nickname
instrovate.admin
Marketing User
Title
Offline User
Company
Instrovate
Knowledge User
Department
Flow User
Division
Service Cloud User
Address
IN
Site.com Contributor User
Time Zone
(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Site.com Publisher User

What is the Profile?

- 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, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

Types of profiles in Salesforce

1. **Standard profiles:**

   By default, salesforce provides below standard profiles.

   We cannot delete standard ones.

   - **Read Only, Standard User, Marketing User, Contract Manager, Solution Manager & System Administrator.**
   - 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.

What is Role Hierarchies?

- A role hierarchy controls the level of visibility that users have to an organization data.
- By defining role hierarchies we can share access to records.
- Users assigned to roles near the top of hierarchies like (CEO, executives, and other higher level roles) get to access the data of all users who fall directly below them I hierarchy.

What is Sharing Rule?

- Sharing rules are used to extend sharing access to users in public groups, roles, or territories.
- Sharing rules give particular users greater access by making automatic exceptions to your org-wide sharing settings.

1. From Setup, enter **Sharing Settings** in the Quick Find box, and select Sharing Settings.
2. In the Manage sharing settings for: picklist, select **Opportunities.**
3. Under **Opportunity Sharing** Rules, click **New** and complete the details.

Field	**Value**
Label	Share Won Opportunities with Account Receivable
Rule Type	Select: **Based on criteria**
Criteria	Field: **Won**, Operator: **Equals**, Value: **True**
Share with	Roles: **Accounts Receivable**
Access Level	**Read/Write**

3. Security and Access: 13%

- Explain the various organization security controls (for example, passwords, IP restrictions, identity confirmation, network settings).
- Given a user request scenario, apply the appropriate security controls based on the features and capabilities of the Salesforce sharing model (for example, organization-wide defaults, roles and the role hierarchy, manual sharing, sharing rules, and public groups).
- Given a scenario, determine the appropriate use of a custom profile or permission set using the various profile settings and permissions.
- Describe how folders can be used to organize and secure communication templates, dashboards, and reports.

Key Topics

- Passwords
- IP restrictions
- Identity confirmation
- Network settings
- Organization-wide defaults
- Roles and role hierarchy
- Manual sharing
- Sharing rules
- Public groups
- Profile settings
- Profile permissions
- Permission sets
- Communication folder settings
- Report folder settings
- Dashboard folder settings

Scenario 1

The Executive Team at Ursa Major Solar is exploring ways to increase protection of the organization's Salesforce data from unauthorized access. It has been proposed to leverage the Trusted IP Ranges feature.

What is a benefit of entering Trusted IP ranges in the network access section?

ANSWER	FEEDBACK
A. USERS WHO LOG IN WITHIN THE NETWORK ARE NOT REQUIRED TO VERIFY THEIR IDENTITY	**Correct. Users logging in via the company network, a trusted IP range, are not required to verify their identity.**
B. ALL ATTEMPTS TO LOG IN FROM OUTSIDE THE NETWORK ARE DENIED	Incorrect. Users are still able to log in from addresses outside the Trusted IP Ranges through the activation process.
C. USERS ARE UNABLE TO LOG IN THROUGH THE API ON NETWORKS NOT MARKED AS TRUSTED	Incorrect: Users are still able to log in from addresses outside the Trusted IP Ranges through the activation process.
D. APPEXCHANGE PACKAGES CAN COMMUNICATE WITH AN EXTERNAL SITE.	Incorrect: Trusted IP Ranges do not affect AppExchange packages.

Scenario 2

Ursa Major Solar uses a hybrid sharing model where contacts and accounts are read only and opportunities and cases are private. The Account Executive (AE) team owns all the accounts. Some contacts are owned by AEs, and other contacts are owned by support reps.

How should the system administrator ensure the AEs can edit all the contacts associated with their accounts, no matter who owns the contact?

ANSWER	FEEDBACK
A. ACCOUNT OWNER PRIVILEGES GIVE THE AE EDIT ACCESS TO ALL RELATED RECORDS BY DEFAULT.	Incorrect. Account owner privileges do not inherently give edit access to all related records.
B. SELECT THE EDIT ALL ASSOCIATED CONTACTS OPTION FOR THE AE ROLE IN THE ROLE HIERARCHY.	**Correct. The Role Hierarchy menu has a checkbox to allow editing of all associated contacts option.**
C. CREATE A PRIVATE CHATTER GROUP FOR AES AND SUPPORT REPS TO SHARE RELEVANT DATA.	Incorrect. Being part of a private Chatter group does not grant read/write access to objects that are otherwise restricted.
D. USE THE MASS TRANSFER TOOL TO TRANSFER OWNERSHIP OF ALL CONTACTS TO THE AES.	Incorrect: AEs need to be able to edit contacts associated to only their accounts, not all contacts.

Scenario 3

The password policy in Ursa Major Solar's org shows that the length of time until passwords expire is 60 days. However, sales reps are complaining that their passwords expire every 30 days.

Where should the system administrator change the password expiration period for the sales rep users?

ANSWER	FEEDBACK
A. INDIVIDUAL USER RECORDS	Incorrect. Password expiration is not accessible in a user's individual record.
B. PERMISSION SETS ASSIGNED TO THE USERS	Incorrect. A permission set is a collection of settings and permissions that give users access to various tools and functions. Password expiration is not one of those functions.
C. PROFILES ASSIGNED TO THE USERS	**Correct: Since the issue is affecting users with the same profile, the password expiration should be adjusted for the profile used by the sales reps.**
D. ROLES ASSIGNED TO THE USERS	Incorrect: Roles affect access on key components such as records and reports, not a setting such password expiration.

Scenario 4

Ursa Major Solar's vice president of global Sales has requested that the sales rep commission report be visible to the executive team.

How should the system administrator provide visibility to the sales rep commission report to the executive team only?

ANSWER	FEEDBACK
A. SET OPPORTUNITY ORG-WIDE DEFAULT SHARING SETTINGS TO PRIVATE.	Incorrect. Setting the opportunity object to Private makes all opportunity records visible only to record owners and those above them in the role hierarchy. This would have a greater effect on the org than needed.
B. SAVE THE REPORT IN A FOLDER SHARED WITH THE EXECUTIVE TEAM.	**Correct. Access to folder contents can be controlled based on roles, permissions, public groups, and license types.**
C. NAME THE REPORT "FOR EXECUTIVE TEAM USE ONLY - DO NOT USE."	Incorrect. While including the phrasing "do not use" in the folder name may deter some users, it is not a secure option.
D. SAVE THE REPORT IN THE MY PERSONAL REPORTS FOLDER.	Incorrect. As the My Personal Reports folder name implies, this report folder is inherently visible only to you. So, this doesn't meet the criteria of providing visibility to the Executive team.

Key Take- away

At the end of this lecture you will have:

- Overview of Salesforce CRM
- Understanding of User creation, Roles, Profile,Sharing rules.
- Data security by various ways like Passwords, IP restrictions, Network settings etc.

THANK YOU

Query Session