Salesforce 101

Introduction to Salesforce

Account & Contact

Activities and collaboration

Case , Service Cloud & Community

Custom objects & fields, Page Layouts and Record Types

Users, Profile, Role Hierarchy, Sharing

Configuration, Data Validation, Automation

Org hands-on - Console view, Chatter, Reports and Dashboards, Salesforce for mobile, AppExchange, Trailhead and Salesforce help

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

Intelligent Customer Success Platform

Terminology

Overview Salesforceterminology

Object

An object lets you to store information of a particular type of information. Objects can be Accounts, Contacts, Opportunities, etc.

App

An app is a group of tabs that can be a Sales app, Service app etc. Apps can also be installed from the AppExchange Store

Related list

A related list is a list of records that are related to a detail record and are shown on the related tab on the record

Tab

Tabs are displayed at the top of each Salesforce page and give access to the objects such as Accounts, Contacts, etc.

Record

A record is a group of fields storing information about a certain area. such as Accounts or Contacts

Objects in Salesforce

An object allows you to store information in your Salesforce organization. The object is the overall definition of the type of information you are storing. For example, the account object allow you to store information regarding customers

Accounts

An account is an organization, company or consumer that you want to track –e.g. a customer, partner or competitor

Contacts

Contacts are the individuals associated with your accounts. You can add personal information that you would like to track

Opportunities

Opportunities track your sales and pending deals. Products can be associated with the opportunity

Cases

a customer's question, feedback, or issue. Support agents can review cases to see how they can deliver better service.

Reports & Dashboard

A report returns a set of records that meets certain criteria. Many reports can be displayed graphically as a dashboard

Chatter

Collaborate with your colleagues, get status information about people and important projects and share information

Data model

Objects chart from Accounts perspective

Accounts

Record types

Accounts are all types of customers (both B2B & B2C) as well as business partners/ competitors of our company. Those types are called record types.

Most popular types of accounts are:

Business Accounts

The business account is used to store all the information **on business records** - clients/ competitors companies, e.g.: company name, address, industry, contact information, company representatives and many more.

Person Accounts

Person accounts let you create persons/contacts that represent end customers - private clients or small enterprise. On technical level is a combination of Account and Contact object. Person accounts are listed in Accounts as well as in Contacts.

*Person accounts will not be available in your Salesforce org from the beginning! They have **to be enabled by Salesforce** (after contacting them). It is important that once enabled they **cannot be disabled**.*

Accounts

Tab and listview

Click on Account Tab **to see the list of Accounts – which is called** List View **in Salesforce.**

From here you can search for an Account, review the details, edit an existing one/ones or create a new one.

List views are fully customizable**. It is possible to create new ones, edit them (e.g. edit the fields that are visible and change their order) or apply a filter.**

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Accounts

Creating an account

When creating an account, Salesforce asks which type to create. We – as Salesforce admins can define those **record types** as well as add / modify the description displayed.

Accounts

Accounts related lists

Related lists on **Accounts** show a list of recent records

Contacts
Contacts of an account

Cases
Recent Cases

Files
Related files

Notes
Created notes

Duplicate check
Possible duplicates

Account Hierarchy

It is possible to create Account Hierarchy by adding Parent Account. Each parent can have a parent as well, all creating a hierarchy (or family).

The hierarchy itself is nicely visualized in Salesforce.

Contacts

Record types

Contacts are persons that are representing Accounts – it can be CEO, Sales Rep, etc.

All contact information like phone number, email or birthday are stored there, we can also add a photo or any other relevant details.

Contact can also have record types but their creation is less common than for accounts. A contact, that is connected (linked) to an Account is called a contact role.

Related lists

Contacts related lists

Related lists on **Contacts** show a list of recent records

Opportunities

Opportunities that are related to that contact

Campaign History

Campaigns, of which the contact is a member

Files

Uploaded files

Notes

Created notes

Duplicate check

Possible duplicates

Accounts

Person Accounts

Person accounts can be found both under Accounts and Contacts

Activities

What is an Activity?

TASKS

Keep your to-do list in Salesforce and relate your tasks to records like leads, accounts, contacts, etc. Salesforce lets you quickly create and update tasks, offers prefiltered task lists and task notification options

EVENTS

Use Events to track meetings with customers, prospects, and colleagues. Drill down from events to related records, feeds, files, contracts, and more. You can also track events in reports

... an event, a task, a call you've logged, or an email you've sent

LOG A CALL

This activity creates a completed task to document communications like a phone call. It is posted on the record page in the Activity History section for future reference

EMAIL

Use email activity to send and track emails directly from Salesforce. With "My email to Salesforce" Salesforce adds outgoing emails from your company-provided email address as activities to records automatically

Activities

Log and createactivities

Create activities

1. Log a call
2. Create a new task
3. Create a new event/meeting

Activity Timeline

Here user have all their object-related activities in a timeline view. Activities in future are shown in the section "Next Steps", while past activities are displayed in the section "Past activity". ktip: Click in the checkbox of an upcoming task to mark it ascompleted

tip

Click in the checkbox of an upcoming task to mark it as completed

Tasks

All about tasks

Today 's Tasks

Find your tasks due today on your Home tab

Assign Tasks to othe rs

Tasks can only have 1 assigned owner at a time, it is per default the user who creates it. Assign other users by searching and adding them to the field "Assigned To". If assigned, the task no longer appears in your task list, but in the list view "Delegated"

Tab "Tasks"

Browse through task list views to see

- all your tasks
- today's tasks
- overdue tasks
- completed tasks (within 7 days)
- delegated tasks

Events

All about events &calendars

Today's Events

Find your today's events on your Home tab. Past events drop off the list as the day progresses

Tab "Calendar"

View, create, and edit your events in a day, week, or month view. Work with all your events and create new ones. See a list of shared calendars

Shared calendars

Share your calendar to other users and add shared calendars from others. The section "Other Calendars" let's you see any calendars shared by colleagues that you've added to your view

Case Management

Cases let you **respond to** and **solve customer issues.**

Cases are powerful records in Salesforce that not only **track customer issues**, but also **show a complete view of the customer.**

Customize cases to fit your business needs and ensure that your **customers always receive the best service.**

Cases are the backbone of Service Cloud.

Service Cloud Features

Use **Lightning Service Console** to view **multiple case records** and their related records on the **same screen**, and quickly work through cases from a list using split view.

Service Cloud Features

1)Split view shows a list view at the same time as your workspace tabs and subtabs.
Apreconfigured navigation- friendly three-column layout for cases:
2)In the first column, related information displayed using Related Record and Related List – Single components.
3)The second column includes a highlights panel that's front and center.
4)The compact case feed lets you see more of your case updates.
5)The third column includes related lists and the Knowledge component.
6) Apreconfigured utility bar with History and Notes.

Service Cloud Features

Set Up and Manage Assets

Keep tabs on the products that your customers buy. Assets represent purchased or installed products, and are an essential piece of the Salesforce puzzle. You can link assets to maintenance plans, entitlements, work orders, and more so your support team can quickly assess the history of a customer's product.

Set Up Routing with Omni-Channel

Omni-Channel routes work requests to the most available and qualified support agents in the console. You can also provide real-time operational intelligence to support supervisors with Omni-Channel Supervisor.

Service Cloud Productivity Tools

Service Cloud offers productivity tools that save your agents time. Quick text lets agents insert predefined text, like notes, messages, and more. Macros lets agents be super users and complete repetitive tasks in one click.

Case Creation

Cases coud be created (captured) via various channels – internal and exteral:

- Manually, by Salesforce users or Community users
- Via mobile device
- Via email (email-to-case)
- Via telephone (integrated softphone, MR)
- Via Social Channels
- Via web (web-to-case)
- Via Live Chat or text session
- Via Salesforce IoT
- Via custom automation (code and non-code)

Support Processes

Support Process helps to define set of Case statuses as sequence of steps in Case life-cycle (analogically to Sales Process).

Support Process may be configured in combination with record types.

Case Assignment Rules

Case Assignment Rules specify the criteria used to route cases to their owners.

You can reorder rule entries on this page after you create tchem (only one rule is executed at a time).

Web-to-Case

Gather customer support requests directly from your company's website and automatically generate new cases with **Web-to-Case**. This can help your organization respond to customers **faster.**

All validations apply during case creation via Web-to-Case. You can define **auto-response rules**.

Up to **5,000 cases** can be **generated per day** with Web-to-Case (Cases created over this limit will be queued).

HTML code for Web-to-Case can be **generated automatically**.

Enable **reCAPTCHA** in Web-to-Case to make it difficult for spambots to waste service representatives' time.

Customize Support settings to select the **default owner** of cases.

Email-to-Case

Set up **Email-to-Case** to efficiently resolve customer issues. Salesforce automatically creates cases and auto-populates case fields when customers send messages to the email addresses you specify.

Customer responses regarding a case are automatically associated with the original case, including any attachments the customer sends.

Case reporting measures both inbound and outbound emails by case so that you can see how many emails are exchanged before an issue is resolved.

Routing addresses allow you to create multiple email addresses from which the contents of customer emails can be converted to case fields.

Assignment Rules, Escalation Rules, Workflow Rules and Auto-Response Rules all work seamlessly with Email-to-Case.

Auto-Response Rules

Send automatic email responses to case submissions based on the record's attributes. Set up **auto-response rules** to send **quick replies to customers** to let them know someone at your company received their inquiry or details about their issue.

- You can activate only one rule for cases at a time.
- Sales and service reps can find the email responses in the **Activity History** related list of the lead or contact and in the Email related list on cases.
- Create auto-response rules for cases submitted through Web-to-Case (also Lead-to-Case), email- to-case (incl. On-demand).

Escalation Rules

Escalation Rule assigns Case to new Owner and optionally sends notifications to apropriate users (supervisors or experts).

Escalation Rules

Automatically determine when cases should escalate and what actions to take.

Entitlement Management - Case Milestones

Case Milestones used with **Entitlements** is the latest way to ensure that Support process is being followed and all defined Service Level Agreements – **SLA** (like time limits to resolve case) are not ecxceeded.
Case Milestones could combine Escalation/Assignment with SLA fulfillment Functionalities.

Salesforce Community

Community Cloud is an **online social platform** that enables companies to connect **customers, partners,** and **employees** with each other and the data and records they need to get work done. At the core of Community Cloud is the ability for customers, partners, and employees to **share information** and help each other **find answers**.

Common use cases for Community:

Customer Service and Account Portals
Empower your customers to find solutions to their customer-service issues on their own with access to your knowledge base, your service agents, and peer-to-peer support. In addition, give customers access to their data in a member portal, or even create cases.
Partner Relationship Management and Channel Sales
Increase your (and your partners') revenue stream by collaborating on opportunities and deals. Onboard partners quickly by sharing content and training materials.
Employee Relationships
Retain happier employees by providing a space for them to easily complete their onboarding, learn about benefits, and resolve HR issues.

Key Featurs

- Get support: open cases, start chats, raise a question
- Chatter – raise questions, posts , engage your customers/partners
- Share objects for read/write
- Reports and Dashboard
- Mobile

Object Customization

Overview

Details	Description, Label, API Name, Allow Reports, Edit and Delete (Custom Object)
Fields & Relationships	Create new fields, add field dependencies, set history tracking, click on a particular field to set field-level security
Page Layouts	Create new page layouts, rearrange fields on layout, add fields, buttons, actions and related lists, set page layout assignments
Button, Links, Actions	Create new buttons, links or actions, edit existing ones
Compact Layouts	Create new compact layouts, select fields to display, set layout assignments
Record Types	Create new record types, enable for profiles and make default if necessary, assign page layouts for record types
Search Layouts	Set layouts for searches and recently viewed-list views
Validation Rules	Create new validation rules, access and edit existing ones

Custom fields

Setup | Objects and Fields | Object Manager

Types of custom fields

- Represent all data formats that can be stored in Salesforce
- Field descriptions can be found on field creation page, next to the field name. A couple of facts that are not mentioned there:
  - **Auto Number** -> actually can be a combination of numbers and text (max. 30 characters). Not available for external objects.
  - **Formula** -> it allows for automatic calculation of other field values. Not available for external objects.
  - **Currency** -> a value here is automatically treated as money value. Default currency can be defined under „company Information". The values are rounded in „half- to-even tie breaking". Not available for external objects.
  - **Master-Detail relationship** -> creates a lasting relationship between two objects. It is not available on standard or external objects. It can be created between a standard and a custom object. Can not be used with the "Campaign Members" object. The Detail object inherits the same settings as the Master object.
  - **Phone** -> max 40 characters.
  - **Text (Encrypted)** -> allows storage of text encrypted with AES algorithm.
  - **URL**-> max 255 characters.

Custom Object

What is a custom object?

- Let's start with the **data model**. A data model is more or less what it sounds like. It's a way to model what database tables look like in a way that makes sense to humans.
- If you're not familiar with databases, think about **storing data in a spreadsheet**. For example a property agency can use it to track all properties that are being sold. Columns can store the address, cost, and other important attributes. Rows can store this information for each property that agency is selling. Database tables are set up in a similar way.
- In Salesforce, we think about **database tables** as **objects**, we think about **columns** as **fields**, and rows as **records**. So instead of an account spreadsheet or table, we have an Account object with fields and a bunch of identically structured records.
- Each object is classified as Enterprise Application or Light Application. Light Applications do not support sharing, and do not have access to Bulk API and to Streaming API.

	A	B	C	D	E	F	G
1	**Property Name**	**Price**	**Bedrooms**	**Bathrooms**	**Square Footage**	**Price/Square Ft**	**Listed on**
2	298 Castle St.	265,000	2	1.5	1102	240	04/01/2017
3	92 Redwood St.	429,100	3	2.5	1230	348	11/02/2016
4	111 Grand View Ct.	650,000	4	3	2494	260	09/12/2016
5	3 Arroyo Blvd.	401,000	3	2	1200	334	05/02/2017
6	6956 W 8th St.	524,600	4	3.5	2200	238	03/03/2017
7	187 Windsor Dr.	249,700	2				
8	9958 Strawberry Ln.	390,800	3				
9	5485 E 3rd St.	677,200	5				
10	8348 Devonshire Dr.	767,100	6				

Setup

Schema Builder

Setup | Objects and Fields | Schema Builder

Viewing objects and relationships

Schema Builder provides a dynamic environment for viewing and modifying all the objects and relationships in your app. This greatly simplifies the task of designing, implementing, and modifying your data model, or schema

Schema Builder lets you add the following to your schema:

- Custom objects
- Lookup relationships
- Master-detail relationships
- All custom fields except: Geolocation

Setup

Aircraft

Integrated database of aircraft

Aircraft

Related lists

Related lists on **Aircraft** show a list of recent records

Opportunities

Aircraft related opportunities

Aircraft History

History of field changes

Field History Tracking

Setup | Objects and Fields | Object Manager

Set Field History

- Select certain fields to track and display the field history in the History related list of an object. The field history data is retained for up to 18 months
- **Modifying any of the selected fields adds an entry to the History related list.** All entries include the date, time, nature of the change, and who made the change. Not all field types are available for historical trend reporting. Certain changes, such as case escalations, are always tracked

Setup

Page Layouts

Setup | Objects and Fields | Object Manager

Create and modify page layouts

1. Display buttons and quick actions
2. Chose what fields are displayed for users in Salesforce
3. Decide how they are ordered
4. Add custom sections
5. Decide if the field is required or read-only
6. Add, remove or edit related lists and the fields displayed on them

Setup

Lightning Record Pages

Setup | Objects and Fields | Object Manager

Create and modify page Components

1. Web Page Preview - Treat this as a preview of the page displayed to the user.

   Lightning Components can be dragged and dropped here and are editable or removable as well.

2. Component List - Contains all usable components for the Page. This includes standard and custom components

3. Component Properties - When a component is selected on the web page,
   its properties pop up in the right panel of the screen.

Users

Setup | Users | Users

Manage User

1. In the user list, you can view and manage all users in your org
2. Reset Password for a particular or multiple user
3. Freeze a user to quickly restrict access to Salesforce
4. You can't delete a user, but you can deactivate an account so a user can no longer log in to Salesforce

Setup

Profiles

Setup | Users | Profiles

Profiles define how users access objects and data, and what they can do within the application

General information about profiles

- When creating a user, a profile must be assigned. Each user can have one profile
- Standard profiles are available, custom profiles can be created
- tip: Clone a standard profile and adjust it to your needs

A profile determines what a user can do

- Create, read, edit, delete records (can be defined per object)
- Administrative permission (customize app)
- General functionality (e.g. run report, create public list views)

A profile describes what a user can see

- Apps
- Tabs
- Record Types
- Page Layouts
- Fields

Setup

Profiles

Setup | Users | Profiles

Object Settings

1. Use the search box to find the setting you need
2. Click on Assigned Users to view and manage all assigned users to this profile
3. Click on Object Settings to see the levels of permission on all objects. Select the object you want to set permissions – e.g. Accounts
4. Specify the type of access (Read, Create, Edit, Delete..) that users have on objects, fields, record types or tabs

Setup

Roles

Setup | Users | Roles

Role Hierarchy

- Use roles together with sharing settings to determine the levels of access that users have to your Salesforce org's data
- Users at any role level can view, edit, and report on all data that's owned by or shared with users below them in the role hierarchy (unless your Salesforce org's sharing model for an object specifies otherwise)
- To enable managers to see team records, create a role hierarchy

Role Hierarchy F/LIST

The Role Hierarchy is a functional setup to manage access, not an org chart!

Setup

Permission Sets

Setup | Users | Permission Sets

Permission Sets

- A permission set is a collection of settings and permissions that give users access to various tools and functions
- When a new permission set is created, the administrator can set the same permissions and settings as in profiles, with one distinction, that permission sets extend users' functional access without changing their profiles
- Create permission sets to grant access among logical groupings of users, regardless of their primary job function
- Each user can have multiple permission sets if required

Setup

Levels of Data Access

Overview

Organization	Maintain a list of authorized users, set password policies, and limit logins to certain hours and locations
Object	By setting permissions on an object, a group of users can be prevented from creating, viewing, editing, or deleting any records of that object
Record	Particular users can be allowed to view an object, but then restrict the individual object records they're allowed to see
Field	Access to certain fields can be restricted, even if a user has access to the object

In Salesforce, you can control access to data at many different levels

Who Sees What video series

Manual Sharing	Allows owners of particular records to share them with other users
Sharing Rules	Automatic exceptions to OWDs for particular groups of users, so they can get to records they don't own or can't normally see
Role Hierarchy	Give access for users higher in the hierarchy to all records owned by users below them in the hierarchy
OWDs	Specify the default level of access users have to each others' records

Organization-Wide Defaults

Setup | Security | Sharing Settings

OWDs

- Administrators use organization-wide defaults to define the default sharing settings for an organization
- Organization-wide defaults specify the baseline level of access that the most restricted user should have
- Whereas sharing rules, roles and profiles open up access, organization- wide defaults restrict access and should be defined first

Default Access	Impact
Private	Only record owners have access to the record
Public Read Only	Every user can read all records of a particular object, but can't edit them. They can only edit records they own
Public Read/Write (Transfer)	Every user can read and update all records of a particular object (Transfer is only applicable to leads and cases)
Controlled by Parent	Sharing access is controlled by access to the related parent record

Setup

Sharing Rules

Setup | Security | Sharing Settings

Sharing Rules

- Sharing rules represent the exceptions to your organization-wide default settings
- If you have organization-wide sharing defaults of Public Read Only or Private, you can define rules that give additional users access to records they do not own
- You can create sharing rules based on record owner or field values in the record

Setup

Approval Process

- An approval process automates how records are approved in Salesforce. An approval process specifies each step of approval, including from whom to request approval and what to do at each point of the process.
- It's likely that you're familiar with process automation in the form of workflow rules. Approvals take automation one step further, letting you specify a sequence of steps that are required to approve a record

Approval Processes

Fee Schedule: Fee Schedule Internal Approval

« Back to Approval Process List

Process Definition Detail — Edit | Clone | Deactivate

Process Name	Fee Schedule Internal Approval	Active	✓
Unique Name	Fee_Schedule_Internal_Approval	Next Automated Approver Determined By	Manager of Record Submitter
Description	Internal approval process on Fee Schedule		
Entry Criteria	Fee Schedule: Fee End Date GREATER OR EQUAL TODAY		
Record Editability	Administrator OR Current Approver	Allow Submitters to Recall Approval Requests	✓
Approval Assignment Email Template	APPROVAL: RIO Education Internal Fee Schedule Approval Email Template		
Initial Submitters	Fee Owner		
Created By	Fred Smith, 13/08/2019 11:53 AM	Modified By	Fred Smith, 13/08/2019 12:03 PM

Initial Submission Actions — Add Existing | Add New

Action	Type	Description
	Record Lock	Lock the record from being edited
Edit | Remove	Field Update	Update Status to Pending Approval

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions | Edit	1	Approval #1	Approval step #1		Unanimous approval required User: ZY Lean, Fred Smith	Final Rejection

Final Approval Actions — Add Existing | Add New

Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit | Remove	Field Update	Update Status to Approved

Final Rejection Actions — Add Existing | Add New

Action	Type	Description
Edit	Record Lock	
Edit | Remove	Field Update	

Fee Schedule

Band 3 - Course: 2020 — Submit for Approval

Details | Fee Schedule Terms | Approval History

Fee Schedule Name	Band 3 - Course: 2020	Fee Amount (Domestic)	$343.75
Fee	Band 3 - Course	Fee Amount (International)	$468.75
		Non Tuition Fee (Domestic)	$150.00
Fee Start Date	1/01/2020	Non Tuition Fee (International)	$230.00
Fee End Date	31/12/2020	Status	Pending Approval
Current	☐		

System Information

Files (1)

Fee Schedule for Coming Semester -Year 2020
13/08/2019 · 79KB · pdf

View All

ACTIONS IN APPROVAL PROCESS

Network Access

Setup | Security | Network Access

Trusted IP Ranges

- Trusted IP Ranges define a list of IP addresses from which users can log in without receiving a login challenge for verification of their identity, such as a code sent to their mobile phone
- Click on New to enter a starting and ending IP Address

Setup

Password Policies

Setup | Security | Password Policies

Set Passwords Policies

- Improve your Salesforce org security with password protection
- Set password expire days, history, length, and complexity requirements along with other values. In addition, you can specify what to do if a user forgets their password

Setup

Session Settings

Setup | Security | Session Settings

Session Security

Session Settings let admins modify session security settings to specify session connection type, timeout settings, and IP address ranges to protect against malicious attacks and more

1. With Session Timeout, you can set the length of time after which the system logs out inactive users. Select a value between 15 minutes and 24 hours. Choose a shorter timeout period if your org has sensitive information and you want to enforce stricter security

2. Set Session Security Levels to restrict access to certain types of resources based on the level of security associated with the authentication (login) method for the user's current session. By default, each login method has one of two security levels: Standard or High Assurance. You can change the session security level and define policies so specified resources are only available to users with a High Assurance level

Setup

Health Check

Setup | Security | Health Check

Reduce Security Risk

- Use Health Check to identify and fix potential vulnerabilities in your security settings
- A summary score shows how your org measures against a security baseline, like the Salesforce Baseline Standard. Optionally, custom baselines can be uploaded
- To remediate a risk, edit a particular risk by clicking on Edit, or use the button Fix Risks to quickly change settings to your selected baseline's recommended values

STATUS	SETTING	GROUP	YOUR VALUE	STANDARD VALUE	ACTIONS
Critical	Enable clickjack protection for customer Visualforce pages with standard headers	Session Settings	Disabled	Enabled	Edit
Critical	Enable clickjack protection for customer Visualforce pages with headers disabled	Session Settings	Disabled	Enabled	Edit
Warning	Require HttpOnly attribute	Session Settings	Disabled	Enabled	Edit
Compliant	Number of security risk file types with Hybrid behavior	File Upload And Download Security Settings	0 security risk file types with Hybrid behavior	0 security risk file types with Hybrid behavior	Edit
Compliant	Maximum invalid login attempts	Password Policies	3	3	Edit
Compliant	Lock sessions to the domain in which they were first used	Session Settings	Enabled	Enabled	Edit

Setup

Demo

Salesforce approach to Automation

Business proces automation in Salesforce can be achieved in various ways, this includes:

- **Validation rules** in combination with **formulas, Assignment Rules, Duplicate Rules, Milestones**
- Configuration by use of declarative tools like **Process Builder, Visual Workflow** and **Workflow Rules or Approvals**
- Automation based on **Apex code**

Automation implementation based on simple configuration and declarative tools should be **always considered before use of code**.

Code based automation should always be the last resort solution!

Validation Rules

Setup | Object Manager | [select Object] | Validation Rules

Validation Rules

- Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record
- A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of "True" or "False"
- Do not forget to set the validation rule to active
- Validation rules can help avoiding complex automation, but also their existence must be considered, when planning automation – Validation rules can cause conflicts and warnings during operating on data

Account Validation Rule

Help for this Page

Back to Account Validation Rules

Validation Rule Detail Edit Clone

Rule Name	International_Phone_Number_PHONE	**Active**	✓
Error Condition Formula	$User.Ignore_Validation_Rules__c = FALSE && NOT(ISBLANK (Phone)) && NOT(REGEX (Phone, "^\\+([0-9 -.()]){6,20}"))		
Error Message	Please start with "+" and use the international phone number format for the Phone (eg: +43...)	**Error Location**	Top of Page
Description	The Phone Number mit be entered in the international Format		
Created By	Christian Eichhorn, 06.09.2017 15:57	**Modified By**	Nikolaus Günzl, 23.10.2017 09:29

Edit Clone

Setup

Salesforce Automation Terminology

Workflow Rule
A workflow rule sets workflow actions into motion when its designated conditions are met. You can configure workflow actions to execute immediately when a record meets the conditions in your workflow rule, or set time triggers that execute the workflow actions on a specific day. If a workflow action hasn't executed yet, you can view and modify it in the workflow queue.

Workflow Action
A workflow action, such as an email alert, field update, outbound message, or task, fires when the conditions of a workflow rule are met.

Email Alert
Email alerts are actions that send emails, using a specified email template, to specified recipients. Workflow alerts can be sent to any user or contact, as long as they have a valid email address.

Field Update
A field update is an action that automatically updates a field with a new value.

Flow
A flow is an application that can execute logic, interact with the Salesforce database, call Apex classes, and collect data from users. You can build flows by using the Cloud Flow Designer.

Trigger Action
It is an action that launches an automation. This could be a change on data record or action could be time dependent (launches at specific point in time)

Outbound Message
An outbound message sends information to a designated endpoint, like an external service. Outbound messages are configured from Setup. You must configure the external endpoint and create a listener for the messages using the SOAP API.

Salesforce Automation

Lightning Processes Builder

- The Process Builder is a workflow tool that helps you easily automate your business processes by providing a powerful and user-friendly visual representation of your **process** as you build it

Visual Workflow

- Visual Workflow lets you automate business processes by building **flows** and distributing them to the right users or systems. A flow is an application that can execute logic, interact with the Salesforce database, call Apex classes, and collect data from users. You can build flows by using the Cloud Flow Designer.

Workflow Rules

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

Automated Actions

- An automated action is a reusable component that performs some sort of action behind the scenes—like updating a field (**Field Update**) or sending an email (**Email Alert**). Once you create an automated action, add it to a process, or other automated process.

Apex

- **Apex Clasess** and **Triggers** are code that could be defined to automate business logic in Salesforce.

Workflow Rules

Setup | Process Automation | Workflow Rules Setup | Process Automation | Process Builder | Workflow Actions

Workflow Rules

- A workflow rule is the main container for a set of workflow instructions. These instructions can always be summed up in **an if/then statement**. For example: If it's raining, then bring an umbrella
- Workflow rules can be broken into two main components:
  1.Criteria: the **"if" part** of the "if/then" statement. In other words, what must be true of the record for the workflow rule to execute the associated actions.
  2.Actions: the **"then" part** of the "if/then" statement. In other words, what to do when the record meets the criteria.
- When a **record meets all the criteria** for a workflow rule, that rule's actions are **executed**.
- **Immediate actions** that execute when a record matches the criteria. For example, Salesforce can automatically send an email that notifies the account team when a new high-value opportunity is created.
- **Time-dependent actions** that queue when a record matches the criteria, and execute according to time triggers. For example, Salesforce can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.

Workflow Rules

Setup | Process Automation | Workflow Rules

Setup | Process Automation | Process Builder | Workflow Actions

Building Workflow Rules

1. **Set the Criteria for Your Workflow Rule.**
   Get started with creating a new workflow rule by selecting the object the rule relates to and configuring its criteria.
2. **Add Automated Actions to Your Workflow Rule.**
   Once you've set the criteria for your workflow rule, identify what to do when that criteria are met.
3. **Identify Your Salesforce Org's Default Workflow User.**
   Select a Default Workflow User that you want Salesforce to display with a workflow rule when the user that triggered the rule is not active.
4. **Activate Your Workflow Rule.**
   Salesforce doesn't trigger a workflow rule until you activate it.

Process Builder

Setup | Process Automation | Process Builder

Processes

- The Process Builder is a workflow tool that helps you easily automate your business processes by providing a powerful and user-friendly visual representation of your process as you build it
- Many of the tasks you normally assign, the emails you regularly send, and other record updates are vital parts of your organization's standard processes
- Instead of doing this repetitive work manually, you can configure processes to do it automatically

Process Builder

Setup | Process Automation | Process Builder

Building a Process

1. **Define the Process Properties** - The process properties uniquely identify your process
2. **Configure the Process Trigger** - Every process includes a trigger, which tells the process when to start. How you configure that trigger depends on what type of process you're creating
3. **Add Process Criteria** - Define the criteria that must be true before the process can execute the associated actions.
4. **Add Actions to Your Process** - After you define a criteria node, define the actions that are executed when the criteria are met. Actions are executed in the order in which they appear in the Process Builder
5. **Execute Actions on More Than One Criteria** - Choose whether to stop or continue your process after specific criteria are met and associated actions execute

Flow

Setup | Process Automation | Flows

Flows

- Flows can either require user interaction **(Interactive)** —perhaps a wizard or guided UI for data entry—or run in the background on their own— perhaps something that automatically transfers records when a user's role changes
- Flows are being built based on blocks (elements like **Screens** and **Record Creates**), connectors, and resources like a **variables** or **formulas**
- Cloud Flow Designer is the tool where flows are being construct. To use the Cloud Flow Designer, you need an up-to-date browser and Adobe® Flash® Player (plugin)
- The real power of a flow is that it can automate updates to your **organization's records**. In a flow, you can automatically **look up values** from records, **create** records, **update** records, **delete** records...
- You can even **combine Flows with Processes!** Record change can invoke Process and process can invoke Flow

Setup

Flow

Setup | Process Automation | Flows

Building a Flow

Before you start creating your flow, **plan it out**. It's much easier to automate a business process by using Visual Workflow when you fully **understand** the details of **your business process**.

1. Open the Cloud Flow Designer. From Setup, enter Flows in the Quick Find box, then select **Flows**, and then click **New Flow**.

2. Drag the appropriate **elements** onto the canvas.

3. **Connect** the elements together so that it's clear what the order of the elements is.

4. Identify **which element the flow should start with** when it runs.

5. **Save** any changes that you made to the flow.

6. **Test** the flow to make sure it's working as you expect it to.

7. **Activate** the flow so that users can run it.

8. **Distribute** the flow to the appropriate users.

Salesforce approach to Automtion

You can make your Salesforce organization even more useful and responsive to your users by developing custom applications and integrating your external applications.

Writing Code

Write code using the Apex programming language to add business logic or use the Visualforce markup language to create the user
interface. Integrate your application using APIs and authenticate your external applications.

Debugging Your Code

Use checkpoints, logs, and the View State tab to help debug the code you've written.

Testing Your Changes

Testing is key to the success of your application, particularly if you deploy your application to customers. If you validate that your application works as expected with no unexpected behavior, your customers are going to trust you more.

Automation Tool Features

	Process Builder	Visual Workflow	Workflow	Approvals
Complexity	Multiple if/then statements	Complex	A single if/then statement	A single if/then statement
Visual designer	✓	✓		
Browser support	All (Chrome recommended)	All (Safari not recommended)	All	All
Starts when	• Record is changed • Invoked by another process	• User clicks button or link • User accesses custom tab • Process starts • Apex is called	Record is changed	• User clicks button or link • Process or flow starts that includes a Submit for Approval action • Apex is called
Supports time-based actions	✓	✓	✓	
Supports user interaction		✓		

Automation Tool Features

Supported Actions				
	Process Builder	Flow	Workflow	Approvals
Send email	✓ (Email alerts only)	✓	✓ (Email alerts only)	✓ (Email alerts only)
Send outbound messages without code			✓	✓
Submit for approval	✓	✓		
Update fields	Any related record	Any record	The record or its parent	The record or its parent
Call Apex code	✓	✓		
Create records	✓	✓	Tasks only	Tasks only
Invoke processes	✓			
Delete records		✓		
Launch a flow	✓	✓	✓ (Pilot)[1]	
Post to Chatter	✓	✓		

[1]The Process Builder has superseded flow trigger workflow actions, previously available in a pilot program. Orgs that are using flow trigger workflow actions can continue to create and edit them, but they aren't available for new orgs.

Login

Verify your account

First login

1. Your administrator creates your user account. Salesforce sends you an automatic generated verification email (have a look at your spam folder). Click on the link in that email to verify your account
2. Salesforce will ask you to set up a password and security question, in case you forget your password
3. Click on „Change Password“ and submit the form

Login

Login and reset password

Login credentials

1. Go to https://login.salesforce.com or your company branded domain https://flist.my.salesforce.com and enter your username, which is your company email address
2. Enter your password, which you already set up earlier
3. If your forgot your password, click on the link below to create a new one

Login

Activating devices

Verifying identity

- If your are logging in from a new device, Salesforce asks to activate that device first
- Salesforce sends you an activation email to the email address specified on your Salesforce user informations
- When you receive the email, copy and paste the code into your browser and click "Verify"

Tips

- When logging in to Salesforce for the first time, you are asked to optionally enter a phone number. If you enter one you receive your verification code by SMS. If you declined, you receive it as described per mail
- You will be asked to verify your device each time you start/download a new browser or delete your cookies

Navigation header

Navigate through Salesforce

Navigation

1. App launcher
2. Tabs
3. Global search
4. Profile settings

Tip

No matter where you are in Salesforce you will always have the navigation bar on the top of the page

App launcher

All apps and items at a glance

App launcher

1. Browse through all of your apps (e.g. Sales, Marketing, Service..)
2. See all your obejcts/items at a glance
3. **For Admins only**: Visit the AppExchange Salesforce Store for external extensions

Tabs

Overview of all important objects

Global search

Salesforce searchbar

Search bar

- Enter your search terms in the header search box
- Search for any record from any object(e.g. accounts, contacts. . .)
- Type your search term and dick on enter to get a detailed overview of all findings

tips

- Search for any value entered into any field
- Find phone numbers by entering part or all of a number
- Use search operators like AND, AND NOT, OR

Profile settings

Change your personal settings

Change..

Personal informations
Language & timezone
Currency
Password
Email signature
Default record types
Chatter email notifications
..and download “Salesforce for Outlook”

Overview: Record page

Overview

1. **Compact layout** - displays a record's key fields at a glance and is customizable
2. **Related tab** - shows the records related lists. You can create new related records from here
3. **Details tab** - have an overview of all details related to the record. Access general, address and system informations
4. **Activity tab** - logg activities related to the record. See and filter your upcoming and past activities in the Activity Timeline
5. **Chatter tab** - Share an update on this record, attach files and search in the feed
6. **Action buttons** - Inlcude standard buttons like Edit, Delete, Clone and custom buttons

Overview: Record page

Guidance For Success

Boost productivity and help reps gather complete data. 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. At each step of a path, you can highlight key fields and include customized guidance for success.

Record ownership

Who owns which record?

Ownership

- Every record has an owner
  (there is no account or contact with no owner)
- The ownership is shown via the record owner field
- Per default, the user who has created a record automatically becomes its owner
- All records can be manually assigned to another user by clicking on the change symbol on the right side of the owner's name.
  Be aware, if you change the ownership to someone else, it might be the case (depending on your sharing settings) that you loose access to that record
- You can only change the record owner if you are currently the owner of the record

List views

Learn how to create your own list views

List views

- List view allows you to see a filtered list of records, such as contacts, accounts, or custom objects.
- You can create your own personal list views
- Default list view is always "Recently viewed records"
- List views are available in most of the tabs/objects

New

1. Click on the gearwheel and select New
2. Give a name and choose who can see your list view
3. After saving you will be redirected to the filter section

Refresh

Refresh the data seen in your listview

Inline editing

Edit multiple records fast and easy in one view (If the object has record types, filter one record type first to enable this feature)

Filters

1. Click on Add Filter
2. Choose a field, operator and value to filter your list
3. Click on Save, or add another filter
4. (Add a filter logic)

Display

1. Display your list as
   - Table
   - Kanban
2. If you choose Kanban, select a criterium to group

Charts

Add a chart to your listview for visualizing your data. Salesforce made some standard charts but if you want to create your own chart..

1. dick on the little gearwheel and select New Chart
2. Enter a name, chart type, aggregate type, aggregate field and grouping field
3. Your chart is ready to display

Chatter

What is Chatter?

Empower your employees to do more with **Chatter** anytime, anywhere

Drive productivity

Connect, engage, and motivate employees to work efficiently. Collaborate on sales opportunities, campaigns and projects

Accelerate innovation

Provide a forum for anyone to share insights or propose new ideas. Connect product teams with direct feedback from customers and create and share polls

Take action anywhere

Track your team and critical projects in the mobile feed. Close cases, update opportunities, and find the latest presentations

Share knowledge

Share knowledge, files, and data. Connect with experts from across your organization regardless of their role or location

Chatter

Features of Chatter

Chatter Posts

Publish posts to share an update, add links or files to it and mention user or groups. You can also ask a question or start a poll. Posts are shared with your followers or with mentioned users or groups

@Mention User

Use this function to address posts to specific persons or groups to bring them into the conversation. Mention user and groups by adding an at sign in front their names e.g. @JohnDoe, @SalesGroup

Chatter Groups

Chatter Groups can be created by every user and can be public, private or unlisted (accessible only by designated users). Create groups to collaborate with your teams and work together on projects

Notifications

Receive email notifications from Chatter when something important happens to your feed - e.g . somebody posts a comment on your post. Let chatter send you personal digests daily, weekly, or never

Files

Files uploaded to Chatter can be found under the Files tab. Files can be shared with only specific colleagues by uploading them in the Files tab and using the Share Settings button on the file detail view

Topics

Putting a # before a keyword marks the word as a topic.

Topics can be searched for and allow the users to find and view all related posts, regardless of where they were posted

Chatter

Chatter posts on records

Record posts

Chatter post on records can be a valuable tool for tracking changes occurring with the record, as well as communicating with other team members on topics related to it

File uploads

Any file that needs to be attached to a record should be uploaded in Chatter

Follow records

Follow records to see updates in your feed ('What I Follow'), including field changes, posts, tasks, and comments on records. To see how many items you're following, view the Following list on your profile.

Chatter

Your Chatter profile

Profile

1. Click on your photo
2. Click on your name
3. Edit your chatter profile informations e.g. your photo
4. See your files, groups and followers in one place

Tip

Check your groups, your followers and user who you follow regularly

Chatter

Where you enter a comment in Chatter will dictate who can (and cannot) see it

Chatter tab

Every user who follows you can see your posts

In Chatter groups

Public groups: Anyone can see and add posts, comments or files. Anyone can join

Private groups: Only members can see and add posts. People must ask to join or be added by the group's responsible person

On a record

Only users with "Read" access to the record can see your posts

Chatter

Chatter vs. email

	Chatter	Email
Instant communication with coworkers	✓	✓
Attach files as supplemental info	✓	✓
Communicate with multiple recipients	✓	
Communicate with entire company (without entering any names or email adresses)	✓	
View co-workers' profiles and photos	✓	
Add comments to posts made by others	✓	
"Like" other posts and updates	✓	
Real-time Feeds to monitor people, information or conversations	✓	
Receive daily or weekly digest of everyconversation about a certain topic	✓	
Create Groups surrounding topics or projects	✓	
Endless digging through archives of conversationto find the infoyou need		✓

Chatter

Dos and Don'ts

Dos	Don'ts
Do participate by asking and answering questions and sharing information	Don't post anything you wouldn't want your HR team or executives to read
Do keep your posts brief and relevant to work	Don't write long-winded posts
Do create private groups if necessary	Don't use Chatter to replace an in-person conversation
Do use Chatter to address a wider audience and get feedback	Don't post confidential information on profiles or public groups
Do use groups rather than email distribution lists for collaboration	Don't post personal messages that aren't relevant to your business
Do post files instead of emailing attachments	Don't post the same thing to multiple people
Do think about who can see your post (Anyone who is following a person or a record can see its Chatter posts)	

Reports & Dashboards

Learn how to use Reports & Dashboards

Dashboards represent data of a report via graphics, which allow users to see key metrics and performances quickly and comprehensively

Reports help you to access data quickly and comprehensively and is a resource component for building dashboards

Report types are templates for report creation

Reports

Report formats

Format	Description	Example	Illustrative
Tabular	Tabular reports are the simplest and fastest way to look at data. Similar to a spreadsheet, they simply consist of an ordered set of fields in columns. Tabular reports are best for creating lists of records ovr a list with a single grand total.	Customer Visits this month	
Summary	Summary reports are similar to tabular reports, but also allow users to group rows of data, view subtotals, and create charts. They can be used as the source report for dashboard components.	Customer Visits this month grouped by sales Rep.	
Matrix	Matrix reports are similar to summary reports but allow the user to group and summarize data by both rows and columns. Matrix reports have some similarities with Pivot Tables in Excel. They can be used as the source report for dashboard components.	Customer Visit count grouped by sales Rep. and account	

Reports

Landing page

Overview

1. **New Report** - Create a new report. (Click on "New Report (Salesforce Classic)" to creat a new report on the old classic layout
2. **New Folder** - Create a new report folder. This Folder will appear in the folder list "Created by Me"
3. **Lists of Reports and Folders** - Access predefined lists of reports and folders
4. **Reports** - By default, this section shows all recent reports. Depending on which list you choose in the left sidebar (3), the respective reports will show up here

Reports

Create a new report

Report Builder

1. **Fields Pane** - Lists all accessible fields in the selected report type
2. **Filters and Outline Pane** - Select filters to limit the data shown in the report. Add groupings and choose which fields to display
3. **Preview Pane** - Contains a dynamic report preview, which allows the user to customize the report and see the immediate effect. The preview shows only a limited number (50) of records. Run the report to see all your results
4. **Save & Run** the report

Reports

Subscribe toreports

Subscribe Reports

1. On the report tab, dick on the dropdown of the report you want to subscribe and dick on "Subscribe"
2. Select the frequency of your scheduled run, the days and the time
3. If needed, choose other users who should receive the report. Also choose a user who should be the running user
4. Click "Save" to completethe process

Reports

Sharing of reports

Sharing

1. Reports in Salesforce are shared through folders. Click on the button on the right side of the folder you want to share. Click on "Share". (Different groups of users can be given different access rights to the same folder)
2. Define your sharing settings in the window that popped up
3. Sharing can be done based on individual Users, Roles, Roles and Subordinates or Public Groups
4. Search the Users, Roles or Public Groups in the Names section and select an access type. After that click on "Share"
5. View who can access the report in the "Who can access" section

Dashboards

Landing page

Overview

1. **New Dashboard** - Create a new Dashboard
2. **New Folder** - Create a new dashboard folder. This Folder will appear in the folder list "Created by Me"
3. **Lists of Dashboards and Folders** - Access predefined lists of dashboards and folders
4. **Dashboards** - By default, this section shows all recent dashboards. Depending on which list you choose in the left sidebar (3), the respective dashboards will show up here

Dashboards

Dashboards charttypes

Funnel

Donut

Metric

299

Gauge

Line

Bar

Scatter

Table

FISCAL PERIOD	SUM OF AMOUNT (...
Q3-2015	EUR 237.500,00
Q2-2015	EUR 86.000,00
Q1-2015	EUR 75.000,00
Q4-2014	EUR 63.000,00
Q3-2014	EUR 60.000,00
Q4-2015	EUR 27.000,00

Dashboards

Create a new dashboard

Add components

1. **New component** - Add a new component (Report plus chart type) to your dashboard
2. **Add report** - Select a report you want to add to your component
3. **Select** - Click on Select to be redirected to choosing chart types
4. **Chart type** - Choose a chart type for your report to visualize your data. Below, define axis, sort rows and add titles
5. **Add your component** to the dashboard

Salesforce app

Mobile app from Salesforce

Instant access to your Chatter, CRM, custom apps, and business processes **on the go**

Available on the App Store

GET IT ON Google Play

The menu provides access to other sections in the mobile app. This is similar to the Navigation Bar tabs in the browser view. By clicking on a section, you can view records and update them if needed.

AppExchange - The #1 Business App Marketplace

An ecosystem of proven business apps

salesforce appexchange

Customized for Salesforce

Trusted and Secure

Reviewed by Peers

3,000+ apps | 300+ components

4+ million installs

Salesforce Documentation

Access Salesforce Help page: **https://help.salesforce.com/home**

1. Use **Salesforce Documentation** for finding latest detailed information on any Salesforce cloud, feature, user guide, release notes or Security compliance related issues

Help & Training

Access Help & Training by clicking on the question mark in the upper right corner of any page in Salesforce

Help

1. The Help & Training section offers context-sensitive help for tabs or related lists your are currently working on

2. If no useful help is listed, you can search for articles by clicking on Search Help & Training. If the right article is found, it will tell you how to use the elements within your Salesforce application

3. Learn best practices by jumping directly into Trailhead. Salesforce offers some modules that might fit your need. If no useful module is listed, just click on Go to Trailhead and search through hundreds of modules to find your training

4. Open a case, let features be activated by an agent and get support here. You can give feedback about Salesforce, or view keyboard shortcuts in this section too

Trailhead

The fun way to learn Salesforce

- **Self-paced online learning** – you can learn what you need when you need it, by choosing the appropriate trail
- **Learning paths** – Trailhead content is arranged in a hierarchy, with three levels: trails, modules, and units, and presented in a specific sequence, so customers have a predefined path to follow, and don't have to spend time deciding what to read and in what order
- **Modular and engaging content** – each tutorial consists of short units, which can be read in 10-15 minutes each. The content is designed to be simple, self-contained, and directly useful, to maximize the value of the learning experience
- **Interactive assessments** – at the end of each unit, you can take a challenge to verify what you just learned, either by answering multiple-choice questions or performing specific tasks in a development org
- **Gamification** – we award points and badges on successful completion of units and modules, respectively. The points and badges are displayed on your user profile, so you can get recognition for your expertise

Trailhead

The fun way to learn Salesforce

If you've ever wished for an easier way to learn about Salesforce, take a look at Trailhead. Trailhead provides developers and administrators a guided, learning path through the key features of Salesforce, using a set of interactive, online tutorials.

Trailhead content blends a variety of content types and approaches to cater to all types of learners, including:

- Videos
- Code samples
- Walkthroughs
- Screenshots
- Images
- Tables and charts
- Step-by-step instructions