
Day -10 All Star Ranger

Salesforce Identity & Core Terminology

Omni-Channel

Omni-Channel is a smart work distributor.

It automatically sends cases, chats, or tasks to the right agent based on availability, skills, and priority.

This removes manual assignment and improves response time.

Record Types

Record Types allow the same object to behave differently for different teams.

For example, an IT Case and an HR Case can have different fields, layouts, and picklist values while still being part of the Case object.

Field Dependency

Field Dependency controls what options appear in a dropdown.

If the main field is “Department = IT,” then only IT-related subcategories will appear.

This helps maintain clean and accurate data.

Picklists

Picklists are predefined dropdown values.

They prevent users from typing random text and keep data standardized for reporting.

Queues

Queues act like a shared inbox.

Instead of assigning a record to a specific person, it is assigned to a team.

Anyone in the queue can pick up the work.

Assignment Rules

Assignment Rules automatically assign records to users or queues based on conditions. For example, US cases can go to the US queue and India cases to the India queue.

Escalation Rules

Escalation Rules ensure that cases are handled on time.

If a case is not resolved within the SLA, Salesforce can send reminders, reassign it, or notify a manager.

Email Templates and Letterheads

Email Templates allow teams to send consistent, preformatted emails.

Letterheads help maintain branding and professional communication.

Salesforce Identity

Salesforce Identity is about giving the right access to the right people.

It controls authentication, authorization, and user management across applications.

Single Sign-On (SSO)

SSO allows users to log in once and access multiple applications without entering passwords again.

It improves user experience and security.

Multi-Factor Authentication (MFA)

MFA adds an extra security step after the password.

Users verify their identity using an authenticator app, OTP, or security key.

This protects accounts even if passwords are compromised.

My Domain

My Domain is a custom Salesforce login URL for your organization.
It is required for SSO, MFA, and secure integrations.

Centralized User Account Management

Admins can manage users, roles, profiles, and permission sets from a single place.
This ensures proper access control and compliance.

App Launcher

The App Launcher is like a home screen for Salesforce apps.
Users can switch between apps with one click.

Internal Users vs External Users

Salesforce supports both employees and external users.
Employees use internal apps with full access based on roles.
Customers and partners access limited features through Experience Cloud and self-registration.

SAML

SAML is used for Single Sign-On between systems.
An Identity Provider (like Azure AD) verifies the user, and Salesforce trusts that verification.
It uses XML to securely exchange authentication data.

OAuth 2.0

OAuth allows external applications to access Salesforce data without sharing passwords.
It uses secure tokens and is commonly used for mobile apps and integrations.

OpenID Connect

OpenID Connect is built on top of OAuth.

It verifies the user's identity and enables social logins like "Login with Google" or "Login with Microsoft."

Why This Matters

Without proper identity and access control:

Data leaks can happen, users may get incorrect access, and compliance can fail.

With the right setup:

Access is secure, work is automated, and users have a smooth login experience.

Real-World Example

A new IT user joins the company.

The user is created in Azure AD.

SSO allows login without a new password.

The correct profile and permission sets are assigned.

The user is added to the IT queue.

Omni-Channel routes cases automatically.

Escalation rules notify the manager if SLAs are missed.

Everything works with minimal manual effort.