Learn Salesforce Lightning

The Visual Guide to the Lightning UI

Felicia Duarte Rachelle Hoffman



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Felicia Duarte La Puente, California, USA

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About the Authors



Felicia Duarte is the chief operating officer of Cloud Creations, Inc., a full-service Salesforce consulting and implementation firm in Los Angeles. She oversees the daily operations of the company, including 70+ active implementations at any given time. Her technical expertise on the Salesforce platform is contrasted by her retail management experience, including SEO, web analytics, and social media marketing. In 2017, she filmed Salesforce Admin Certification training courses for ITPRO.TV. In her time off, she enjoys quality time with her two young boys, Michael and Ayden.



Rachelle Hoffman is the chief technology officer of Cloud Creations, Inc., a full-service Salesforce consulting and implementation firm in Los Angeles. Her years of experience on the Salesforce platform include the retail and business services industries. Her marquee clients include Southern California Edison, Smart & Final, Paramount Pictures, and other Fortune 500 Cloud Creations clients. You can reach the firm at www.cloudcreations.com. In her spare time, she enjoys spending time with her husband Tyson, being

outdoors, playing with her dogs and relaxing with family and friends. She continues to further her education every chance she gets and loves being part of the Salesforce community.

About the Technical Reviewer



Phil Weinmeister, Salesforce MVP, is the senior director of product management at 7Summits, where he is focused on delivering impactful, transformative communities on the Salesforce platform and building innovative components, apps, and bolts that drive those communities. Phil is 18x Salesforce certified and has delivered numerous solutions to a variety of organizations on the Force.com platform since 2010. A graduate of Carnegie Mellon University with a double major in business administration/IT and Spanish,

Phil now resides in Powder Springs, Georgia. He spends most of his "free" time with his gorgeous, sweet wife, Amy, and his children, Tariku, Sophie, Max, and Lyla. When he's not trying to make his kids laugh, cheering on the Arizona Cardinals, or rap battling his wife, Phil involves himself in various church-related activities with friends and family in the Cobb County area.

Phil authored *Practical Salesforce.com Development Without Code*, released in 2015, and will release another book through Apress in 2018. His second Salesforce book will serve as a guide for building and managing communities on the Salesforce platform.

Stay updated on Phil's most recent insights and blog posts by following him on Twitter (@PhilWeinmeister).

Foreword

Two years ago, we launched Salesforce Lightning. It was (and if I'm being honest, still is) an audacious undertaking.

Our mission with Lightning was to completely reinvent Salesforce to provide a new modern user experience that set a new standard for customer relationship management (CRM) and build it all on a new, robust, and scalable enterprise application framework. We wanted to make Salesforce easier, more intuitive, and virtually limitless in its potential. And we wanted it to empower everyone in our community to be their best, including trailblazers, admins, customers, partners, and our employees.

Since launching Lightning, we've seen an outpouring of enthusiasm from our community, unlike anything I've ever seen in enterprise software. It's been awe-inspiring.

One of the best things about Lightning is that it helps us innovate faster. With each release, we're expanding the scale and scope of Lightning and doing more than I ever thought possible.

Since launching it just two years ago, we've done the following:

- Redefined the modern selling cycle with Sales Cloud Lightning
- Reimagined the modern contact center with Service Cloud Lightning
- Streamlined navigation to make it easier to move between Salesforce apps
- Empowered admins and trailblazers with a no-code framework so they can easily customize the Salesforce user interface (UI) for their organizations
- Helped more than 100,000 customers deploy Lightning
- Sparked a new level of creativity and momentum in our ecosystem with more than 1,000 new Lightning-ready apps from partners such as DocuSign, Evernote, and FinancialForce that can be simply dragged and dropped into Salesforce

FOREWORD

- Created entirely new products that previously weren't possible, such as Salesforce Einstein, an artificial intelligence (AI) offering for CRM, and Lightning Bolt, which offers industry-specific portals for our Community Cloud
- Empowered countless salespeople, service agents, and marketing pros to sell, service, and market faster, smarter, and the way they want

Every day our community gives us feedback—sometimes positive, sometimes critical, but always constructive. And every day, our entire product team (me included) pores over that feedback, and it helps us get better and better. Lightning is what it is today because of you. So, thank you for all you do to help us make Salesforce and Lightning better and better with each release.

Lightning is the future of Salesforce. So, buckle up because we're just getting started.

Mike Rosenbaum EVP of CRM apps, Salesforce

Acknowledgments

I wish to thank everyone who helped us complete this book. Without their effort and support, we would not have been able to bring this to a successful completion.

Thanks to our editors, Susan and Rita, for their effort, time, and patience. Thank you for this opportunity and all your help.

Thanks to Phil Weinmeister, for his knowledge and expertise as our technical reviewer.

Thanks to Justin Davis, for his support and guidance throughout this process.

Most important, I'd like to dedicate this book to my children, Michael Frank and Ayden James. Don't give up. There is always something to learn.

-Felicia Duarte

Introduction

"Do business faster."

-Cloud Creations

Just like our company tagline, we believe you can "do business faster" with Salesforce Lightning. We wrote this book to provide training on the innovative Lightning Experience in a clear and visual way. As executives in a Salesforce consulting company, we understood the challenges that other organizations faced when it came to user acceptance of a new experience. We wanted to provide material that was easy to follow, with real-life examples, so administrators and users are set up for success.

Learn Salesforce Lightning is a step-by-step visual guide that offers immediate and valuable solutions to the new set of UI tools included in Lightning.

You'll learn to do the following:

- Navigate the Salesforce Lightning Experience
- Migrate from Salesforce Classic to Lightning
- Make customizations
- Configure dynamic reports and dashboards
- Build logic to automate the system with Process Builder
- Manage your data and security
- And much more

This book is for Salesforce administrators, business users, developers, and IT members. Our goal is to prepare you to onboard one of the most innovative and fastest customer relationship management (CRMs) solutions on the market: Salesforce Lightning.

CHAPTER 1

Introducing Salesforce Lightning

Salesforce is currently the number-one customer relationship management (CRM) solution for business management. Delivering a robust platform and groundbreaking technology, Salesforce provides solutions for sales, service, and marketing departments. The Lightning Experience provides a new user interface that delivers a faster platform, dynamic capabilities, and enhanced aesthetics. Businesses have reported an increase in win rates, more collaboration, improved productivity, and faster reporting following the switch to Lightning (see Figure 1-1).



Figure 1-1. Salesforce Lightning Experience

Lightning Pages

The Lightning pages focus attention on what matters most. Important information is displayed "above the fold," or positioned at the top half of the screen, so users can view key points quicker.

Additionally, layouts are consistent and easy to navigate. See the comparison of an account record in Classic (see Figure 1-2) versus the same record in Lightning (Figure 1-3).

Cloud Cl Cloud Cl Cloud Cl	reations	ortunities Fo	precasts	Products	Reports	Dashboa		Content	•
- Show Feed Click to add to	opics: 🕐								🔊 Add Tags
Orders (0) Asset Account Detail Clean Status	8 10 Contacts (1) O Not Compared	Opportunities (3)	Cases (0)	<u>Open Activitie</u> Include Offline	ha Cal <u>Activity</u>	History (2) Fax	<u>Notes & Attac</u> (800) 951-7		ccount Team (0)
Account Owner	-	Sheered				Website		reations.com	
Account Name	Cloud Creations M				Ticke	er Symbol	they are to start	1000010.000	
Parent Account	Cibba Creatoris [11	an menareny j				wnership			
Account Number	123456					mployees			
Account Site						SIC Code			
Туре	Customer - Direct								
Industry	Consulting								
Annual Revenue									
Address Information									

Figure 1-2. Salesforce account record in Salesforce Classic

Cloud Creations		+ Follow Ed	t New Contract New Case •
e Phone Website Account Denair Account Size Industry			
ELATED DETAILS NEWS		ACTIVITY CHATTER	
We found no potential duplicates of this account. No duplicate rules are activated. Acclaste duplicate rules to facetify potential duplicate records.		New Task New Eve. Log e Cell Erro	
no ouglicada nues are a chivanac, acculanza ougenzana reles to carinty potential ouglicada records.		Oractor a tassiti	A55
Contacts (1)	New	Fiber Timeline Next Steps	Expand All
Michael Flank		No next steps. To get things moving, ad Past Activity	d a task or set up a meeting.
- Hard	View At	No past activity. Past meetings and tasks	
Cpportunities (D)	New		
Cases (0)	New		
Notes 8 Attachments (0)	Upload Ries		

Figure 1-3. Salesforce account record in the Lightning Experience

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Migrate to Lightning Experience

Migrating to the Salesforce Lightning Experience is straightforward. The following steps describe how to access the Migration Assistant. The Migration Assistant will check your organization's readiness for Lightning and walk you through a series of steps to enable Lightning for your organization. This is a great first step on your Lightning journey.

Note These steps are not required but highly encouraged. Salesforce has spent considerable time thinking through potential migration pitfalls and has tried to address them within the Migration Assistant.

Migration Assistant

Follow these steps:

1. In Classic, select Setup (see Figure 1-4).

salesforce			54	erch						Felicia Duarte 👻 Setup	Help Sales
Home Leads 7	Accounts Cont	tacts Opportuni	lies Forecasts	Products	Reports	Dashboards	Files	Content	+	/	
	loud Creat	tions							/	Custonize Page Edt Layout	Printable View Help for this Page
+ Show Feed	Click to add topics:	0									🔊 Add Tags

Figure 1-4. Setup area in Salesforce Classic

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2. From the Setup menu, click the Get Started button (see Figure 1-5).



Figure 1-5. Get Started button in Setup

3. From here, you have three available resources to learn more about the Lightning Experience. You can select from the options in Figure 1-6.

Learn About Lightning Experience	
Introducing Lightning Experience See how Lightning Experience can revolutionize the way your team gets work done.	Watch Video
Compare Lightning Experience and Salesforce Classic Verify that the features and customizations your users need are available in the new interface.	Compare
Get Ready to Migrate to Lightning Experience Learn more about Lightning Experience and the best practices for rolling out the new interface to your users. And get a badge while you're at it!	Start Trail

Figure 1-6. Learning resources for Salesforce Lightning

4. Click Next Step to get started.

Check Readiness

To get started, Salesforce will request access to your organization to analyze your current setup (Figure 1-7).

sale	sforce
Allow	Access?
Lightning Readiness is	asking to:
Access your basic info	ormation
• Provide access to cust	tom applications
Access and manage y	our data
 Perform requests on y 	your behalf at any time
Do you want to allow acc	ess for
felicia@itprotvtraining.co	em? (Not you?)
Deny	Allow
	go to your personal settings.

Figure 1-7. Allowing access to Lightning Readiness

Once you click Allow, shown in Figure 1-7, you must select which Salesforce product you want to access (see Figure 1-8).

	Select products
W	hich products do you want to check?
3	Sales Cloud
	Service Cloud

Figure 1-8. Product selection to check for Lightning Readiness

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Select the appropriate Salesforce product and click Check Readiness. Salesforce will analyze your current setup and email a readiness report (see Figure 1-9). New organizations can skip this step.



Figure 1-9. Lightning migration options

Preview

You can preview how your organization works in the Lightning environment. This is a great feature to test any issues that may have been brought up in your readiness report. If you encounter any issues in this switch, you can make changes on the spot. To test this, navigate to the Preview tab and click Preview, as shown in Figure 1-10.

CHAPTER 1 INTRODUCING SALESFORCE LIGHTNING



Figure 1-10. Preview tab in the Migration Assistant

As you can see in Figure 1-11, you are instantly switched to Lightning in Preview mode.

		Q, Sear	ch Salesforce								• ?	ŵ	۹ 🌡
Sales	Home Opportuni	ies 🗸	Leads 🗸	Tasks 🗸	Notes 🗸	Accounts 🗸	Contact	~	Products	✓ Car	mpaigns	~	More 🔻
	formance WeekView				As of Today 11:4	9:29 AM C' i	•	Assist	ant				
CLOSED \$0	OPEN (>70%) \$0 G0	AL \$100	0,000 🖍					> 👻		nity has ov st Account		tasks	
									Connector	nity has or	undun t	hanler	
100k							-	> 👻		ations HQ		laska	

Figure 1-11. Lightning Experience in Preview mode

Optimize with Features

For the complete experience of Lightning, take a look at some of the new features made available. This includes a new feature for news, options to enable activities and notes, and more. Navigate to this tab, and click Optimize with Features to enable/disable the Lightning features found in Figure 1-12.



Figure 1-12. Lightning features to enable

You can enable the following options:

- Click Set Up My Domain to create a URL that is reflective of your company's brand. This will add a subdomain to your Salesforce organization URL. Use this feature to increase the login and authentication process.
- Click Set Up Shared Activities to allow users to relate multiple contacts to an individual activity.
- Enable News to display relevant news article about your accounts and their industries. This information is pulled by accounts listed in your organization.

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- Enable Social Accounts, Contacts, and Leads to allow users to connect better with your accounts by syncing social media accounts.
- Enable Notes to utilize the enhanced version of notes that includes automatic saving in edit mode, an option to add images, and share features.

Set Up Users

You can control who has access to the Lightning Experience. You can choose to roll this out to groups of users, individual users, or all users.

Note Standard profile users have access to Lightning by default, while custom profile users do not. Click Learn How to change these settings.

Navigate to the Set up Users tab shown in Figure 1-13 to fine-tune this experience and select which users make the switch.

earn	Check Readiness	Preview	Optimize with Features	Set Up Users	Turn It On	
				-		
			(
			a th		0	
		-				
			Set Up Users for L	ightning Exp	erienœ	
	Fine-Tune W	/ho Can Use	Lightning Experience			Long Hay
	Standard profile	users are enabl	E Lightning Experience led to access Lightning Experience ske sure the right users get access		stom profile	Learn How
	Standard profile users aren't. Ad)	users are enabl just things to ma with Lighting Ex	led to access Lightning Experienc			Learn How
	Standard profile users aren't. Adj Just beginning v more users later	e users are enabl just things to ma with Lighting Ex r.	led to access Lightning Experiences ske sure the right users get access			Learn How Switch Users

Figure 1-13. User setup

CHAPTER 1 INTRODUCING SALESFORCE LIGHTNING

Follow these steps to switch users:

- 1. Click Switch Users.
- 2. Select appropriate users by clicking the + next to their name (Figure 1-14).
- 3. Click Save.

	Switch	Users to Lightning Expe	erience
Whe	en users get access to Lig	ghtning Experience, they stay in Salesforce C switch.	lassic until they choose to
	Select the us	sers that you want switched to the new inter	face now.
Sea	rch for users		
0 User	s Selected		Maximum 200 Users at a time
	NAME	USERNAME	HAS ACCESS
+	Chatter Expert	chatty.00d41000002ickteai.ypcp3dhhdd	бlu 🗸
+	Felicia Duarte	felicia@itprotvtraining.com	~
	Integration User	integration@00d41000002ickteai.com	
	Security User	insightssecurity@00d41000002ickteai.c	om
			Save

Figure 1-14. Selecting users to migrate to Lightning

Rollout Approach

Execute a rollout strategy that works best for your company. For larger organizations, it is recommended that you have a phased rollout approach. This approach is advantageous when migrating large organizations and complex setups. There are a few benefits to this approach, including the following:

- This approach allows you to conduct user acceptance testing. Use this to identify any challenges or issues with the new experience. You can collect feedback from your users and fine-tune changes before executing to the entire organization.
- Make progress on your implementation by breaking this up into pieces. This ensures that progress is being made while staying on top of new features and changes.

The suggested rollout approach starts with new users, a pilot group of users, and lastly all users.

Turn It On

Hurray! The final step! Once your organization is ready to make the move to Lightning, select the Turn It On tab shown in Figure 1-15. Switch the tab to Enabled to finish.



Figure 1-15. Turning on Lightning to finish

Note With the right permissions, users have the option to toggle between Classic and the Lightning Experience. From the Classic interface, select your username and click Switch to Lightning Experience, as shown in Figure 1-16. From the Lightning Experience, click Switch to Classic, as shown in Figure 1-17.

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salesforce	Search Felicia Duarte 🔹	Setup Help Sales
Home Leads Accounts Contacts Opportunities F	My Profile My Settings	Dashboards Files Conter
	Developer Console	
Felicia Duarte Saturday October 7, 2017	Switch to Lightning Experience	Summer '17 for Develo

Figure 1-16. Switching from Classic to Lightning

	🔄 🔂 ? 🕸 🌲 🧯	6
	Felicia Duarte na35.salesforce.com Settings Log Out	:
USERNA	AMES	
O fdua OPTION	arte@cloudcreations.com NS	
	to Salesforce Classic 🕦	

Figure 1-17. Switching from Lightning Experience to Salesforce Classic

Lightning Home Page

The Lightning Experience home page is enhanced with new features. The home page can be tailored to give your users everything they need to manage their day in one centralized place. Without any configuration, Salesforce displays the following components: Quarterly Performance, Assistant, News, Today's Tasks, Today's Events, Recent Records, and Top Deals. See Figures 1-18 and 1-19.



Figure 1-18. Top half of the Lightning home page



Figure 1-19. Bottom half of the Lightning home page

Navigation Bar

The navigation bar uses tabs to hold objects, as shown in Figure 1-20. In database terms, an *object* is a table. Objects hold groupings of information that may be related. This includes the records that live in them. Records are considered the rows that you find within a table. You will hear this terminology referenced throughout this book. For more information on objects, records, and fields, navigate to Chapter X.

In Lightning, each tab is actionable.



Figure 1-20. Navigation bar

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In the navigation bar, objects are broken down into lists. These lists hold Salesforce records in relation to their object. One of the neat features of this is that records can be created directly from a tab. Each list can be used to see the object's most recent items. This makes it easier for users to create new records on the fly.

Quarterly Performance

The Quarterly Performance summary is a powerful reporting tool used to show sales users' performance based on a pipeline (see Figure 1-21).

Quarterly Performance Week View CLOSED SO OPEN (570%) SO GOAL 🖍	As of Jun 12, 2017 2:33:34 PM	ሮ ਛ ▼
20%		
Add the opportunities you're working on, then come back here to view your performanc	ē.	
0 Apr 02 Apr 09 Apr 16 Apr 23 Apr 30 May 07 May 14 May 21 May 28 Closed B Goal Closed + Open (570%)	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Jun 25

Figure 1-21. Quarterly Performance component located on the home page

Closed records display the user's closed opportunities.

Open (>70%) displays the sum of all records with a probability greater than 70 percent.

If the user is part of a team, the team's opportunity sums will be showcased on this report. Otherwise, the data represented will be the user's owned opportunities.

Setting a Goal

To set a goal, follow these steps:

1. Click the pencil icon and enter an amount, as shown in Figure 1-22.

Edit G	oal		
USD	750,000		
		Cancel	Save

Figure 1-22. Select the pencil icon to edit your quarterly goal

2. Click Save.

The chart automatically calculates and updates the chart. Click c to refresh the data. Click to filter the data by week or day (Figure 1-23).

Now your sales users can start their day with a data visualization of their sales progress.

News

This new feature is a great way to display news articles related to your accounts and their industries. Once enabled, as discussed in the "Enhanced Features" section, news information can be displayed on your home page. When news is accessed from the home page, information is displayed based on recently viewed records and tasks and events for those records. See Figure 1-23.



Figure 1-23. News component found on the home page

Click See More News to navigate to the News tab, as shown in Figure 1-24.

	Q Se	arch Salesforce		🔄 🖬 ? 🕸 뵺 🌡
Sales	Home Oppo	rtunities 🗸 Leads 🗸 Tasks 🗸 Notes 🗸	Accounts 🗸	Contacts 🗸 News More 🗸
🗐 News				
✓ Industry	News (20)			
	ne Amazon Fire P News - TechCruncl			
		one of Amazon's biggest misfires – and rightfully so. After de	ebuting in the top spo	ot of the company's r
		China Farada harran (n. 11/62).		
		China Forestry gets bumper response for HK\$2bn of Forest & Wood Products Industry News - globalcapital.com		
		A HK\$2bn (\$256m) three year maiden loan for China Fore resulting in a huge o	istry Group Corp has l	been received warmly by international banks,
		2 1		
	fac	Facebook begins 'human review' of potentially sen: Internet Industry News - foxbusiness.com - 9h	sitive ads	
2		Facebook says it will begin manually reviewing advertisers ethnicity and socia	ents that target certal	in groups and address politics, religion,

Figure 1-24. Industry news found in the News object

This tab displays a list of news articles titled Industry News. Information populated here is related to your accounts and their industry.
Assistant

Lightning Assistant is helpful in prioritizing an end user's daily tasks. Tasks that are overdue are showcased first on the top right of the page (see Figure 1-25). The following overdue tasks are tasks that are due today.



Figure 1-25. Lightning Assistant

Global Search

The Salesforce global search bar appears at the top of every page. Use this area to search across any object in Salesforce. It's best practice to search for a record before creating a new one to avoid duplicate data. Use wildcards and operators for greater search results.

Use an asterisk (*) to find records that match at the middle or end of your search, and use a question mark (?) to find records that match only one character at the middle or end of your search.

For example, a search for Ay^* at the end will find and display results for a contact named Ayden. It will also find and display results for Andy Young (Figure 1-26).

۹ 🔍	Ay*				1	- 8	? 🅸 🏚	
Sales	Home	Opportunities	✓ Leads ✓	Tasks 🗸	Notes 🗸	Accounts	✓ More	•
SEARCH RESULTS	-	Contacts 2 Results • Sou	rted by Relevance					
Top Results		NAME	ACCOUNT NAME	E ACCOUNT S	ITE PHONE		EMAIL	
Opportunities		Ayden James	Cloud Creations		(555)	827-6877	ajames@clou	dcreat
Leads		Andy Young	Dickenson plc		(785)	241-6200	a_young@did	kenso
Tasks	1	•[<u> </u>
Notes		Leads						
Accounts		1 Result						
Contacts		NAME	TITLE	COMPANY	PHONE	MOBI	ILE EMAIL	
Products		Andy Young	SVP, Operations	Dickenson plc	(620) 241-62	200	a_your	ng@dicl
Campaigns	0	•						•

Figure 1-26. Search results for Ay*

Favorites List

The Favorites icon is a new tool in the Lightning platform. Favorites are customized shortcuts to records and items most frequently visited, such as favorite individual records, list views, dashboards, and more.

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To make an item a favorite, click the star button in Figure 1-27. This powerful tool makes it easy to find your favorite records from different object locations, all in one place.



Figure 1-27. Favorites icon

You can make your top deals, your most frequently visited reports, your top leads, and more your favorites!

Click the arrow next to the star to select items in your Favorites list, as shown in Figure 1-28.



Figure 1-28. List of favorites

Lightning Actions

The + button shown in Figure 1-29 can be used to quickly create records in Salesforce. Use this quick-create feature to create a new activity, lead, contact, opportunity, case, or call directly from the home page.



Figure 1-29. Lightning actions

Click any of the available options to instantly display a quick-create window at the bottom right of the screen.

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In the Lightning Experience, multiple windows can be opened from the home page to enhance user productivity and speed. Up to three windows can be displayed at once (see Figure 1-30).

Michael Frank	Call	- ** ×		👻 New Opportunity	- ** ×
tle Company resident D&B Windows	Subject Call	Comments		* Opportunity Name	
Open - Not Contacted				Account Name	
	Name	Related To		Search Accounts	
ACTIVITY CHATTER	ち 👻 Search Contacts	Search Accounts		* Close Date	
1				11/6/2017	8
Log a Call New Task N				* Stage	
				None	*
Recap your call			Add	Amount	
iter Timeline 🔻			xpand /	Next Step	
lext Steps					
Send 🕏 37 Produ		Savo	Yester		Save

Figure 1-30. Utility bar

Help and Training

Salesforce has many great support resources including videos, walk-throughs, and an interactive learning tool called Trailhead. From the home page, click the question mark (shown in Figure 1-30) to access these resources. Each page has a help menu with links to helpful resources. Use this area to log a case and get support, give feedback, and view release notes.

Salesforce provides three seasonal releases a year: spring, summer, and winter. Each release offers more than 150 new features. The image displayed at the bottom right of this menu (shown in Figure 1-31) tells which release your organization is currently in.



Figure 1-31. Help and training

Setup

Setup is an area used most frequently by Salesforce administrators. In Lightning, the Setup page has improved! The setup area has a more logical and easier-to-navigate layout. System administrators and users with the appropriate permission settings can access this area. Select Setup from the toolbar to navigate here (see Figure 1-32).



Figure 1-32. Lightning Setup home page

Setup has these categories: Administration, Platform Tools, and Settings. View the Most Recently Used Places in Setup to seamlessly continue any admin work. Use the Quick Find to easily find the admin tools necessary for custom work. Click the Create button to quickly access the most common tools, including creating new objects, workflows, tabs, templates, and users (see Figure 1-33.)



Figure 1-33. Create button

Notifications

View all notifications in one place, including approval requests and chatter mentions. Click the bell icon to see a list of notifications (see Figure 1-34).



Figure 1-34. Notifications area

View Profile

Use this section to make changes to personal settings, log out, or switch to Salesforce Classic (see Figure 1-35).



Figure 1-35. Settings area

Users

In Lightning you can create Salesforce users just as easy as you can in Classic. Users are identified with a license, username and password, and profile. In Lightning you can create new users, deactivate users, edit user settings, and more.

Create a New User

To assign licenses and record ownership, you must first create a user. Each user must be assigned a license. To free up a license, you can deactivate a user and assign accordingly. In Quick Find, search for and select Users, which is located in the Administration section.

Navigate to the User home page (see Figure 1-36) to create an individual user, edit information about an existing user, add multiple users, and reset passwords.



Figure 1-36. User setup home page

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Create and Edit User Information

Follow these steps to create a new user:

- 1. Click New User.
- 2. Fill in all the required fields marked in red. This includes Last Name, Alias, Email, Username, and Nickname (see Figure 1-37).

lew User				Help fo	or this Page (
User Edit		Save Save & New Cancel			
General Informati	on			= Require	d Information
First Name		Role	<none specified=""></none>		
Last Name	I	User License	Salesforce	•	(
Alias	_	Profile	-None-	1	
Email		Active	1		
Username		Marketing User			
Nickname	I	i Offline User			
Title		Knowledge User			
Company		Force.com Flow User			
Department		Service Cloud User			

Figure 1-37. Required fields to add a new user

Note The email address must be in the form of a valid email address but can be used for multiple organizations. However, the username must be a unique username and in a correct email format.

For example, felicia@cloudcreations.com is a proper email format.

- 3. Assign the appropriate license in the User License field.
- 4. Assign a profile using the Profile field.
- 5. Select Marketing User to give the assigned user access to your organization's marketing tools.
- 6. Select Offline User to give the assigned user offline access.

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- 7. Select Knowledge User to give permission to make changes to Knowledge Base articles.
- 8. Select Force.com Flow User to grant the ability for a Force.com licensed user to run flows.
- 9. Select Service Cloud User to grant access to Service Cloud.
- 10. Select Site.com Contributor User to allow access to Site.com.
- 11. Select Work.com user to assign a work.com user feature license.
- 12. Select Salesforce Classic User to enable access to Salesforce Mobile Classic.
- 13. Apply the appropriate locale settings such as time zone, locale, and language (Figure 1-30).
- 14. Click Save.

Salesforce sends a notification email to the user immediately to generate a new password. To stop this, deselect "Generate new password" at the bottom of the screen.

Add Multiple Users

You can save time by adding multiple users at once. To add multiple users on the User home page, click Add Multiple Users, as shown in Figure 1-38.



Figure 1-38. Add Multiple Users button

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The next page will break down the number of licenses available for each license type, as shown in Figure 1-39.



Figure 1-39. Breakdown of available licenses

Scroll to the bottom of the page and select the user license that you want to add for all users, as shown in Figure 1-40.

SETUP Use	rs
Add Use	Cancel
User	None
License	None
	Salesforce
	Salesforce Platform
	XOrg Proxy User
	Force.com - App Subscription
	Partner App Subscription
	Force.com - Free
	Work.com Only
	Chatter Free
	Chatter External
	Identity

Figure 1-40. Selecting the user license for a mass group of users

Note When adding multiple users, they must be users with the same license type.

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Once you select the appropriate license type, fill in the details for the user and click Save, as shown in Figure 1-41. Not all user fields are available in this process.

New Us	ers	= Required Information
New User	#1	
First Name		
Last Name		
Email (User Name)		
Profile	None	•
Role	<none specified=""></none>	•
🗖 Gene	rate passwords and notify user	via email
	Sa	ave Cancel

Figure 1-41. Required fields for a new user

Deactivate a User

In Salesforce, you can't delete a user, but you can deactivate a user to prevent them from logging in. Deactivating a user frees up a license that can be assigned to another user (see Figure 1-42). When you deactivate a user, the user is removed from all sharing privileges and groups.

User Edit		Save Save	& New Ca	ncel	
General Info	ormation				= Required
First Name	Integration	Role	<none s<="" th=""><th>pecified></th><th>-</th></none>	pecified>	-
Last Name	User	User License	Analytics Cl	oud Integration Us	er
Alias	integ	Profile	Analytics	Cloud Integratio	n User 💌 🧵
Email	integration@example.c	Active		-	

Figure 1-42. Active check box on a user's page

Records owned by this user can still be transferred to an active account. These are the deactivation steps:

- 1. Navigate to the User section in Setup.
- 2. Select the name of the user that should be deactivated.
- 3. Click Edit from the user record page.
- 4. Deselect Active from the user profile.
- 5. Click Save.

Lightning Pages

Lightning allows you to create custom pages to display and arrange key information for specific groups of users. You can increase adoption and user acceptance by building out clear and easy-to-use pages. By creating apps, you can minimize the type of information that is exposed to make the Salesforce organization easier to adopt. The App Builder is a new drag-and-drop tool to customize the interface without code (see Figure 1-43).

Follow these steps to make changes to the Lightning home page:

 From the home page, click Edit Page (this feature can be found on most Lightning pages). See Figure 1-43.



Figure 1-43. Edit Page in the Setup drop-down

2. Arrange which components you want accessible for your users to see. See Figure 1-44.

Lightning App Builder - Hom	ie Page Defai	ılt				← Back	? Help
5 d X 🛙 🗎		🖵 Desktop	Shrink To View	•	C ⁴ Refresh Sav	e	
Lightning Components	C	Supervise set	Anton () ()	P	age		
Search components	Q		COMPANY AND AND AND		Label		
▼ Standard (19)	-	-		ļ	Home Page Default		
App Launcher	-	The second secon		•	Developer Name		
Sasistant		an a	·**		Home_Page_Default		
💿 Chatter Feed		Turkation and the second secon	40 K. 1984				
4 Chatter Publisher		Partition		P	age Type		
Filter List		Annue A			Home Page		

Figure 1-44. Lightning App Builder

3. In the left panel, choose from the available Lightning components and drag and drop to the desired section on the home page. The right panel will request details specific to the component chosen.

Create a New Lightning App

From Setup, search and select App Manager to open up the Lightning Experience App Manager. Click New Lightning App to create a new app (see Figure 1-45).

	Lightning Ex	perience /	App Manag	ger	w Lightning Ap	p New Conr	ice ice rq
13 iti	ems • Sorted by App	p Name • Filtered	d by TabSet Type	/			
	APP NA 🕇	DEVEL	DESCRI	LAST M	APP TY	VISIBLE	
1	App Launc	AppLaunc	App Launc	1/22/201	Classic	~	•
2	Cloud Cre	Cloud_Cre		1/23/201	Classic		•
3	Community	Community	Salesforce	1/22/201	Classic	~	
4	Content	Content	Salesforce	1/22/201	Classic	~	•
5	Marketing	Marketing	Best-in-cla	1/22/201	Classic	~	-

Figure 1-45. Creating a new Lightning app

To create a new app, follow these steps:

1. Fill in the required fields (those marked with an asterisk).

The app name is what will appear in the navigation bar.

The developer name is the API name and must be unique across other apps in your organization.

2. For App Branding, upload an image such as a company logo to customize the page (see Figure 1-46).

	New Lightning App		
	p Details & Brandin		
Give your Lightning app a name and descript App Details	App Brandir		
*App Name	(mage 👩	Primary Color Hex Value 0	
Name your app		#0070D2	
* Developer Name	1 Upload		
Enter a developer name			
Description	App Launch	er Preview	
Enter a description			
o	0	· · · · ·	Next

Figure 1-46. App details

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- 3. Once you fill out the appropriate fields, click Next.
- 4. Select the navigation style. Choose Standard to display the navigation bar at the top or Console to open records in a new workspace tab (see Figure 1-47).

pp Navigation	
andard navigation shows items in a navigation bar at the top of the page.	
onsole navigation opens each record in a new workspace tab.	
wigation Style	
Standard navigation	
Console navigation	
ervice Setup	
cess options specific to Service Console in Lightning Experience. When	
u include Service Setup it will be available via the navigation bar or the gear	
n.	
rvice Setup	
Include Service Setup	
0 0	Next

Figure 1-47. New Lightning app navigation options

- 5. Click Next.
- 6. Click Add to add the utility bar (see Figure 1-48).

To enable	le the utility bar for this app, add a	a utility item.	
÷	-		
	_		
L F-	- • • •		

Figure 1-48. Steps to enable utility bar for an app

7. Select the items that should be displayed in the new app. The order of your selected items will display at the top of the page from left to right (see Figure 1-49).

Choose the items to inclu		ect Ite	ms rrange the order in which iten	ns appear.
Available Items		Selec	ted Items	
Q Type to filter list	8	F.	Accounts	
App Launcher	-		Calendar	
Approval Requests			Campaigns	
Assets				
Cases		•		
Chatter				

Figure 1-49. Adding tabs to new app

Note It is best practice to create different apps for different groups of users. When creating these apps, it's recommended that you display only the items that are relevant to those groups of users. It can be overwhelming and frustrating when there is too much unnecessary information for your users.

> For example, a sales app should show only sales-related items. Leads, accounts, contacts, and opportunities are examples. For your service agents, they most likely do not need to see opportunities. Create an app for your service agents to see only service-related items such as contacts and cases.

- 8. Click Next.
- 9. Select the profiles that should have access to this app (see Figure 1-50).

	gn to User Profiles e user profiles that can access this app.
vailable Profiles	Selected Profiles
Q Type to filter list 😵	
Analytics Cloud Integration User	-
Analytics Cloud Security User	
Authenticated Website	
Authenticated Website	
Cloud Creations Standard User	

Figure 1-50. Assigning users to an app

10. Click Save and Finish Now. You can find the newly created app in the App Launcher.

Company Settings

Company settings are comprised of the settings that can be customized, such as fiscal year, business and holiday hours, language settings, and other important information.

Company Information

Search for and select Company Information in the Quick Find area. The Company Information section holds important information about the organization, license availability, and data usage.

Organization Detail

The organization detail displays general information about the company. Edit the primary contact to establish the point of contact for any technical support requests. Make changes to the locale, currency, and newsletters settings here (see Figure 1-51).

Company Information			Help for this Page
he organization's profile is	s below.		
	User Licenses [10+]	Permission Set Licenses [10+] Feature Licenses [11] Usage-bas	ed Entitlements (BETA) [0]
Organization Detail		Edit	
Organization Name	Cloud C	Phone	
Primary Contact	Felicia Duarte		
	rencia Duarte	Fax	
Division	r encia Duarte	Fax Default Locale	English (United States)
2012 No. 10 10 10 10 10 10 10 10 10 10	rencia Duane		English (United States) English
Division	US	Default Locale	
Division		Default Locale	
Division Address	US	Default Locale Default Language	English (GMT-07:00) Pacific Daylight Time

Figure 1-51. Organization detail

Storage Usage

Each organization has storage limits. Storage is divided into two categories: data and file storage. To view your storage limits, storage usage, and percentage utilized, navigate to your company settings.

Click View next to Used Data Space or Used File Space to view your organization's current storage use.

The storage usage is broken down and shows the percentage of utilization across the two. Information is also broken down by object, as shown in Figure 1-52. Use this breakdown to identify which records occupy the most space.

our organization's storage usage is listed	below.			
Storage Type	Limit	Used		Percent Use
Data Storage	5.0 MB	396 KB		8
File Storage	20.0 MB	2.2 MB		115
Opportunities		40	80 KB	20
Opportunities		40	80 KB	20
Contacts		27	54 KB	14
Cases		26	52 KB	13
		24	48 KB	12
Leads			10.175	
		21	42 KB	11
Leads Accounts Campaigns		21 5	42 KB 40 KB	11

Figure 1-52. Storage Usage breakdown

User Licenses

This section displays the total number of licenses available, the total used, and the remaining number of licenses available for each license type. This includes the standard Salesforce license, which is the most commonly purchased and assigned (see Figure 1-53).

Jser Licenses				Use	r Licenses Help
Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
Salesforce	Active	2	1	1	
Salesforce Platform	Active	3	0	3	
Customer Community Login	Active	5	0	5	
XOrg Proxy User	Active	2	0	2	
Work.com Only	Active	3	0	3	
Customer Portal Manager Custom	Active	5	0	5	
Identity	Active	10	0	10	
Customer Community Plus	Active	5	0	5	
Silver Partner	Active	2	0	2	
Gold Partner	Active	3	0	3	

Figure 1-53. User licenses

Permission Set Licenses

Permission set licenses entitle users to access features and various tools that are not included in their user license. This can include a Service Cloud console user, a CRM user, Analytics Cloud accessibility, and more.

Feature Set Licenses

Feature set licenses include additional features on top of the standard user license. These can include Data.com, knowledge users, marketing users, and more.

Usage-Based Entitlements (BETA) Licenses

This feature is available for a limited amount of time for an organization. These tools can vary but are typically made available temporarily.

Fiscal Year

Set the fiscal year in Salesforce with your existing quarterly and annual account periods in Salesforce. This information is important to have for reporting and forecasting purposes.

Modify Fiscal Year: Standard

To modify the standard fiscal year, navigate to the Fiscal Year section in Setup and follow these steps (see Figure 1-54):

- 1. If the Gregorian calendar year is followed by your company, choose Standard Custom Year. (Select Custom if the standard fiscal year is not followed.)
- 2. Select Fiscal Year Start Month.
- 3. Set whether the entered month is based on the ending or start of the month.
- 4. Click Save.
- 5. Choose Standard or Custom Fiscal Year.

SETUP Fiscal Year	
To specify the fiscal year type for y	our organization, choose one of the options below.
	Fiscal Year Information Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2017 and ends in March 2018, your Fiscal Year setting can be either 2017 or 2018. If your forecast period is set to quarterly, changing your fiscal year start month will delete existing forecast adjustments and quotas.
Standard Fiscal Year 1	Change Fiscal Year Period Save Cancel
C Custom Fiscal Year 👔	Name Cloud C Fiscal Year Start January Fiscal Year is Based On C The ending month C The starting month

Figure 1-54. Making changes to your organization's fiscal year

Business Hours

Business hours define how the customer support team interacts with Salesforce. Specify the hours the support team is available to resolve cases. Salesforce will adjust the hours to sync with escalation rules, milestones, cases, and entitlement processes. Use the following steps to get started:

- 1. Select Business Hours in the Quick Find area.
- 2. Click New Business Hours to navigate to the edit page (see Figure 1-55).

SETUP Business Hours				
Step 1. Business Hours Name				
Business Hours Name Default			Use these b	uoniooo V
Active 🔽			hours as the	e default
iiiiii le				
Step 2. Time Zone				
Time Zone (GMT-07:00) Pacific E)aylight Time (/	America/Los_A	ngeles)	•
Step 3. Business Hours				
	Sunday	12:00 AM	to 12:00 AM	✓ 24 hours
	Monday	12:00 AM	to 12:00 AM	✓ 24 hours
	Tuesday	12:00 AM	to 12:00 AM	✓ 24 hours
	Wednesday	12:00 AM	to 12:00 AM	24 hours
	Thursday	12:00 AM	to 12:00 AM	☑ 24 hours
	Friday	12:00 AM	to 12:00 AM	✓ 24 hours
	Saturday	12:00 AM	to 12:00 AM	✓ 24 hours

Figure 1-55. Making changes to your organization's business hours

- 3. Give it a specific name.
- 4. Select the time zone.
- 5. Specify the business hours.
- 6. Click Active to activate these hours.
- 7. Click Save to use these business hours as the default.

Summary

This chapter served as an introduction to the new intelligence and sophistication of Salesforce Lightning. In this chapter, we covered how to migrate from Classic to Lightning and prepared your organization for success with getting set up. The next chapter will discuss how to get the most out of Sales Cloud in Lightning.

CHAPTER 2

Sales Cloud Lightning

The Sales Cloud gives sales and marketing professionals the ability to increase sales productivity and revenue at lightning speeds. You can see the complete customer journey from a prospective lead to an active customer by recording leads, accounts, contacts, opportunities, and campaigns. In Sales Cloud Lightning, leads are captured, nurtured, and seamlessly converted into active accounts or prospects. Sales leaders can then manage their sales pipeline with opportunity tracking to effectively close more deals (Figure 2-1).



Figure 2-1. New kanban feature on the Opportunities object in Sales Cloud

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Lead Management

Across different business models, a lead in Salesforce can be an individual, organization, or entity. The Lead object can act as a holding bucket of all prospects stored in Salesforce. Leads come from a variety of sources. So, it's a good idea to use the lead area to track important information about your leads, including contact information and notes.

Your leads may come from various entry points and may be a result of your marketing efforts. Use the Lead object to manage and nurture your leads as they are being worked through the qualification process. This can include leads that come from your web site via a Web to Lead, purchased lists, referrals, networking events, and others. Use this information to tell which channels your best leads come from.

For example, create a lead record for the prospect you met at your latest marketing event. Include important contact information about your lead, add notes, and create follow-up tasks to prevent leads from slipping through the cracks. Generate a report to see where most of your qualified leads come from. Use this information to put your marketing dollars in the most effective places.

Lead Conversion

Once you qualify your lead as a firm prospect, you can convert your lead into an account, contact, and opportunity. When you convert a lead in Salesforce, standard lead fields populate the new account, contact, and opportunity records.

Business leads create a business account, business contact, and opportunity. Individual customers, when converted, create a persons account and opportunity.

Note Not all business models use leads. However, lead tracking in Salesforce is a useful method for separating untouched leads from more promising prospects in the database. Identify your business process to determine the point of conversion.

Understand the Lead Page

In the Lightning Experience, the lead record contains important information about the lead including contact details, activity tracking, campaign history, chatter, and news.

Sales leaders can work through their most qualified leads faster with the help of Lead Workspace toolbar. This toolbar makes it easy for reps to take their leads through the lead conversion process.

Figure 2-2 shows a lead record in the Lightning Experience. This page layout consolidates key information with a highlights panel, an activity section, and the Lead Workspace toolbar.



Figure 2-2. A lead record page in the Lightning Experience

The highlights panel, shown in Figure 2-3, displays key information at the top of the page. By default, this includes lead salutation, first name, last name, title, company, all phone fields, and email. This feature makes it easier for your users to work through leads quickly.



Figure 2-3. Highlights panel on a lead record

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The interactive toolbar shown in Figure 2-4 is called the Lead Workspace. This area helps users follow a series of configurable steps in the conversion process, referred to as *sales path*. Encourage users to update the lead status as they work to qualify leads.



Figure 2-4. Lead Workspace toolbar

Use the Activity tab, as shown in Figure 2-5, to log a call, create a new task or event, and send email. Create tasks to prevent your leads from slipping through the cracks. Any tasks that need to be completed will populate in the Next Steps area. Activities that have been completed are logged in the Past Activity section.

ACTIVITY	CHATTER	DETAILS	NEWS		
Log a Call	New Task New	/Event Email			
Recap your	r call			Add	
ter Timeline	•			Expand All	c
ext Steps		More Step	5		
	Follow Up on sample have an upcoming Task	e e e e e e e e e e e e e e e e e e e	5	Tomorrow	•

Figure 2-5. Activity section on a lead record

Use the chatter feature on a lead record, shown in Figure 2-6, as a collaboration tool. Use this as your communication vehicle within Salesforce to collaborate with each other. Post updates, ask questions, and create polls.

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ACTIVITY	CHATTER	DETAILS	NEWS	
Post Po	oll Question			
Share an	update			Share
Latest Posts 🔻	ę.	Q Sea	rch this feed	
		- Felicia Duarte crea	ted a task.	

Figure 2-6. Chatter tab on a lead record

The Details tab shown in Figure 2-7 displays information related to the lead. This includes any standard and custom fields made visible to the user.

🚼 Mr. Ayden James		
ACTIVITY CHATTER	DETAILS	NEWS
Lead Owner		Phone
🚯 Felicia Duarte	£	(555) 827-6877
Name		Mobile
Mr. Ayden James		
Company		Fax
Cloud Creations		55518234711
Title		Email
Vice President		ajames@cloudcreations.com
Lead Source		Website
Partner Referral	1	
Industry		Lead Status
Riotechnology	1	Open - Not Contacted

Figure 2-7. Details tab on a lead record

Use the News tab shown in Figure 2-8 to find news articles related to your lead. You can also sync your organization with Twitter to see up-to-date Twitter feeds and related connections.
Open - Not	Contacted	Working - Conta	cted Clo	sed - Not Converted	
CTIVITY	CHATTER	DETAILS	NEWS		
Twitter				1	
arn More Usin	g Twitter			+	
ign in to link a l cent tweets.	ſwitter profile, find p	eople in common,	and quickly access	y Sign in with	Twitte

Figure 2-8. News section on a lead record

To the far right of the page on a default lead layout, shown in Figure 2-9, you can identify potential duplicate records. If there are any duplicates found, that information will populate this section.

Mr. Ayd	en James					+ Follow	Convert	Edit	New Case	
Open - Not	Contacted	Working - Contac	ted	Closed - Not Converted	Convert	ed	🗸 Mark	Status a	s Complete	
ACTIVITY	CHATTER	DETAILS	NEWS				d no notes	tial dam	l'antre of	
- Twitter						this lead.	d no poten	itial dup	licates or	
Learn More Usins	z Twitter					No duplicate rule rules to identify p				
		eople in common, a	nd quickly a	ccess Sign in with Tv						

Figure 2-9. Duplicates area on a lead record

Note The highlights panel can be rearranged to display the most important lead details at the top of the page. This makes it easy for end users to leverage key information.

Create a Lead

Follow these steps to learn how to create a new lead record from a list view:

1. Click the button next to the Leads tab and click New Lead.

Alternatively, you can click New from a Lead List view to create a new lead (Figure 2-10).

				Q. Search I.	eads and	d more								* -	Ð	?	¢.	ņ.	ß
	Sal	es	Home	Opportunities	~ L	Leads	× T	asks 🔪	 Files 	Notes	~	Accounts	~	Contacts	~	More	•		
×	LEAI	os cently	View	od -								-	New	Impo	ort	Add to	Camp	aign	
	ne	centry	VIEWW	euv						-	_	100 C							
iter		lated a fev								-				\$ -		C	1	e	1
iter					CON	J PANY	F	PHONE		MOBILE		EMAIL		tead st		10.5	NER A		1
iter		lated a fev	w second	s ago		MPANY ud Cre		PHONE (555) 82		MOBILE		EMAIL ajames@d			ΔT	10.5	NER A		Y

Figure 2-10. New button on a lead from a Lead list view

2. Type the first name of the lead on the edit page, as shown in Figure 2-11.

	Create Lead	
Lead Information		
Lead Owner	Phone	
Felicia Duarte		
Name	Mobile	
Salutation		
None	•	
First Name		
*Last Name		
*Company	Fax	
Title	Email	

Figure 2-11. Edit page of a lead record. Fill in the appropriate lead details here.

3. Type the last name of the lead, which is required to save any lead record. Type the company name; this is the name of the business the lead is associated with.

Note When converted, the first and last names will generate the contact's first and last names. The company name is used to create an account record and maps to the Account Name field.

Last Name and Company Name are required lead fields. If data is not filled in these fields, the record will not be saved. It's ideal to fill out more data on a lead record. You should consider adding any additional important information about your lead.

- 4. Click Save to save the record. Click Save and New to save the current record and be directed to create a new lead.
- 5. When a lead is created successfully, a success message will display at the top of the page, as shown in Figure 2-12.



Figure 2-12. New lead record success message

If the record was not properly saved, an error message will be displayed, as shown in Figure 2-13. An error message is displayed at the top of the page.

Crea	ate Lead
Review the errors on this page.	
These required fields must be completed: Last Name	
Lead Information	
Lead Owner	Phone
Felicia Duarte	
* Name	Mobile
Salutation	
None 💌	
First Name	
Michael	
*Last Name	
Complete this field	

Figure 2-13. Error message received after trying to save a record without filling in all required fields marked in red

Note Required fields are marked with a red asterisk, as shown in Figure 2-11. These fields must be populated with information in order for the record to be saved. If the field does not have an asterisk, it is not required and can be left blank, assuming there are no other validation rules in place.

How to Convert a Lead

Follow these steps to learn how to convert a lead in Salesforce:

- 1. Open an existing lead record.
- 2. From the lead record page, click the Convert button shown in Figure 2-14.

Mr. Avd	en James		+ Follow	Convert	Edit New Case	
wii. Ayu	enjames		TTOHOW	Convert	Luit New cuse	
Title	Company	Phone(2) 🔻	Email			
Vice President	Cloud Creations	(555) 827-6877	ajame	s@cloudcrea	tions.com	

Figure 2-14. The Convert button on a lead record

3. Fill in the appropriate details located on the Convert Lead edit page, as shown in Figure 2-15.

Convert Lead					
* Converted Status Closed - Converted					
* Record Owner					
Elicia Duarte	×				
* Account Name					
Search Account					
Opportunity Name					
	Cancel Convert				

Figure 2-15. Convert page includes converted status, record owner, account name, and opportunity name

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4. Enter the converted status. Closed - Converted is the default conversion status.

Note The lead status field captures a value that corresponds to a converted or unconverted status. Select the appropriate lead status. By default, Converted is the default status.

- 5. Assign the record owner. This can be assigned to any Salesforce user.
- 6. Type in the account name. You can search for an existing account or create a new one. If the account does not exist, click New Account to create a new account record directly. If the lead is an individual, leave the Account Name field blank.
- 7. To create an opportunity record while converting, type the name of the opportunity. Leave this field blank if an opportunity does not exist.
- 8. Click Convert and view the conversion confirmation page, as shown in Figure 2-16.



Figure 2-16. Conversion confirmation page

Accounts and Contacts

An account in Salesforce can be an organization, company, or institution, while a contact can be an individual associated with a business.

For example, you may have an upcoming meeting with Michael Scott at Dunder Mifflin Paper Co. in regard to a potential opportunity about your product or services. Track information about Michael Scott and Dunder Mifflin Paper Co. in Salesforce. Create a new account and call it Dunder Mifflin Paper Co. Next, create a contact record for Michael Scott to relate the two.

Tip It's best practice to search for something before creating a new record to avoid duplication.

Accounts

You can sort your accounts by type, status, or any other standard or custom field in Salesforce. Keep track of accounts that are active versus inactive, within a particular industry or territory, and much more.

From the Account list, you can identify key contacts, opportunities, cases, and related notes and attachments for an at-a-glance view.

Note You can create roll-up summary fields at the account level to summarize specific metrics. For example, create a roll-up field to aggregate the total amount for all Closed Won opportunities. See the section "Field Types" in Chapter 1 for more information on roll-up fields.

Accounts and contacts have a master-detail relationship. This is a parentchild relationship in which the master object (Account) controls the detail object (Contact). See the section "Field Types" in Chapter 1 to learn more about master-detail relationships.

Create a New Account

Accounts can be created or imported directly into Salesforce, without having to be converted. Create an account record to track information at the account level, such as employee count, account number, web site, etc.

- 1. From the toolbar, click next to the Account tab.
- 2. Click New Account.
- 3. Fill in all required fields marked with an asterisk, including the account name (Figure 2-17).

C.	00	to	Ac	-	0		at
	ed	le	Ac	J.	U	u	11

Account Owner	Fax
Felicia Duarte	
Account Name	Website
Parent Account	Ticker Symbol
Search Accounts	
Account Number	OwnershipNone

Figure 2-17. Account record in edit mode

4. Click Save to save an account record. A success message will appear when properly saved, shown in Figure 2-18.



Figure 2-18. Account success message

Contacts

Use the contact record to capture individual information, including email addresses, phone numbers, birth dates, and more. Use this information to boost client relationships. Create encrypted fields to store secure information at the contact level, for example, Social Security numbers and credit card information.

As mentioned earlier, accounts and contacts have a master-detail relationship. To create a relationship between the two, make sure to enter the account name when creating a contact.

Tip Create the contact from the account record to quickly relate the two.

Follow these steps to create a contact from an existing account:

1. From the account record, click the New Contact button shown in Figure 2-19.

			Q Search S	alesforce				* • 🖬 ?	¢ 🛉	ß
	Sales	Home	Opportunities	∨ Leads ∨ Tasks	✓ Files Notes ✓	Accounts 🗸	Cont	acts 🗸 More	• •	
F	ACCOUNT Dunder	Mifflin				+ Follow	Eclit	New Contact	New Case	•
Туре	Phon	e	Website	Account Owner	Account Site	Industry	l		1	

Figure 2-19. New Contact button on an account record

2. Type the first name on the edit page, as shown in Figure 2-20.

Nev	v Contact	
*Name		4
Salutation		
None		r
First Name		
* Last Name		
Email		
	Cancel	Save

Figure 2-20. Edit page for a new contact

- 3. Type the last name (this is required to save any contact record).
- 4. The account name is prefilled with the name of the account record you started in. Fill in any additional information about the contact.
- 5. Click Save to save the record and relate Michael Scott with Dunder Mifflin. Once properly saved, a success message will appear, as shown in Figure 2-21.



Figure 2-21. New contact success message

Now, in the account record you can see the new contact record, as shown in Figure 2-22.

💼 Dunder Miffli	'n	
🖪 Contacts (1)		New
B Michael Scott Title: Email:	Regional Manager michaelscott@dundermifflin.com	•
Phone:		View All

Figure 2-22. An account with its related contacts. Click New to relate more contacts.

List Views

List views make it easier to sort Salesforce data within each object. Leverage list views to call on specific groupings of records. For example, create a list view to only see active accounts, hot leads, and opportunities in the negotiation stage, and so on. Records are automatically displayed in any list view when the criteria are met. Take action on these lists with Salesforce's importing and mass updating capabilities.

The new user interface (UI(in Lightning makes it easier to visualize data. Add charts to your views and use the new drag-and-drop feature to move records across different stages.

Create a List View

Follow these steps to create a new list view:

- 1. To create a list view, select the tab of the object desired. For example, select the Accounts tab to create an Account List view.
- 2. Select the list view controller boxed in red, shown in Figure 2-23, and click New.

			Q Search	Accoun	ts and m	ore							* *	Ð	? 1	ţ, ı	μ.,	8
	Sales	Home	Opportunities	~ 1	Leads 🗸	Tasks	~	Files	Notes	~	Accounts 🗸	Conta	cts 🗸	Мо	re 🔻			
T.	ACCOUNT Recent	rs tly View	ed 👻								1	_		1	N	lew	Imp	ort
9 iter	ms • Updated a												¢ •		G	/	C	Ţ
	ACCOUN	T NAME		ACCOU	INT SITE			P	HONE			ACC	OUNT	OWNER	ALIA	s		
1	ACCOUN Dunder M			ACCOU	INT SITE			P	HONE			ACC:		OWNER	R ALIA	\S		¥

Figure 2-23. List view controller

3. Give your list view a name. In this example, you're creating a list view for your gold accounts (Figure 2-24).

New List View		
* List Name		
Gold Accounts		
Who sees this list view?		
Only I can see this list view		
All users can see this list view ()		
	Cancel	Save

Figure 2-24. New list view edit page

- 4. Select the appropriate level of access. If this is a list view that should be visible only to you, select "Only I can see this list view."
- 5. Click Save and view the new list in Figure 2-25.

ACCOUNTS Gold Account Name · Updated a few seconds ago 20 items · Sorted by Account Name · Updated a few seconds ago ACCOUN ↑ ACCOUN BILLING PHONE TYPE 1 Aethna H VA (434) 36 TYPE 2 Aethna H VA (434) 36 TYPE 3 American PA (610) 26 Custor 4 Burlingto NC (336) 22 Custor 5 Cloud Cr Costor 555 82 Custor	s Notes V Accounts V Contacts V Campaigns V More V
ACCOUN ACCOUN BILLING PHONE TYPE 1 Aethna H VA (434) 36 1 2 Aethna H VA (434) 36 1 3 American PA (610) 26 1 4 Burlingto NC (336) 22 Custor 5 Cloud Cr (555) 82 1	New Import
Aethna H VA (434) 36 Aethna H Aethna H Image: Cloud Cr Image: Cloud Cr	*· III · C / C 🕇
2 Aethna H 3 American 4 Burlingto 5 Cloud Cr	ACCOUN Filters
3 American PA (610) 26 4 Burlingto NC (336) 22 Custor 5 Cloud Cr (555) 82 Cloud Cr (555) 82	FDuar 💌 📥
4 Burlingto NC (336) 22 Custor 5 Cloud Cr (555) 82	FDuar Show me
5 Cloud Cr (555) 82	FDuar My accounts
	ner FDuar 💌 Add Filter Remove A
6 Cloud Cr	FDuar
	FDuar
7 Dickenso KS (785) 24 Custor	ner FDuar

Figure 2-25. List view after selecting Save

6. Apply filters to your list views to segment Salesforce data, as shown in Figure 2-26.

			N	ew	Imp	ort
	\$ * -	•	C		C	T
Filters						\rightarrow
Show m My acco						

Figure 2-26. The filter area in a list view

7. Apply a filter to your Salesforce data using the filter section in Figure 2-27. Click Add Filter.

Field			
Rating	•	Show me My leads	
Operator		Matching all of these filters	
equals	•	New Filter*	×
Value		Add Filter	Remove All
1 option selected	•		
		Add Filter Logic	
	Done		

Figure 2-27. Use this section to create filter logic

8. Set the Field, Operator, and Value options of the filter, as shown in Figure 2-14. (See the Reports area for more information on operators.)

Example To create a list of only hot leads that I own, I created a filter. The values to this filter include "show only lead records where I am the owner" and Equal to Hot for the Rating field.

9. Click Done and Save.

Take Action on List Views

Records can be edited inline in a list view by clicking the pencil icon or double-clicking in the field. To save records that have been modified in a list view, click Save at the bottom of the page (Figure 2-28).

	Sale	s Ho	me Chat	ter Oppo	rtunities 🗸	Leads	✓ Task	s ∨ Fi	les Accou	ints 🗸	Contacts V Campaigns V Mor	e 🕶
×	LEAD Feli	is icia's Vi	ew 🔻								New Emport Add to Camp	algn 🔻
23 iter	ms • Sor	rted by Crea	ited Date • La	st updated a	few seconds	ago					\$ • A • C /	C T
		NAME	EMAIL	сом	STAT	LEA	UNR	CRE	↓ ow			
1		Feli		Clo		Op		4/3	FDu	•	Leads By Lead Source	*
2		Bet	bbl	Am	PA	Wor	Image: A start of the start	2/1	FDu			
3		San	san	Hig	CA	Wor	~	2/1	FDu	•		
4		Eug	eluc	Paci	MA	Clo	\checkmark	2/1	FDu			
5		Bill	bill	Zen	OH	Clo	Image: A start of the start	2/1	FDu		23	
6		Jac	jrog	Burl	NC	Clo	\checkmark	2/1	FDu		25	
7		Car	car	Ace	AL	Clo		2/1	FDu			
8		Dav	davi	Blu		Wor	~	2/1	FDu			
9		Krist	kaki	Aet	VA	Wor	 Image: A start of the start of	2/1	FDu			
10		And	a_y	Dic	KS	Clo	~	2/1	FDu			\$
11		Pat	pat	Pyr		Clo	1	2/1	FDu		Web 7	
		Mar	nor	Gro	04	War		2/1	ED.,	-		

Figure 2-28. Charts within lists

Experience the enhanced update to list views in the Lightning Experience. Salesforce introduces a new UI to list views with its report charts and kanban functionality. Report charts can be displayed as bar graphs and donut charts.

Kanban Feature

Make lightning-fast changes in Salesforce with the new kanban feature. Instantly update the status of multiple records within a list view by utilizing the new drag-and-drop feature shown in Figure 2-29. In the kanban view, each record is displayed as a widget that can be dragged and dropped across the lead status pipeline. This enhanced feature makes it easier to visualize and organize your data.

	<	2 Search Salesforce				* • (🖬 ? 🏟 🐥 🧲	3
Sales Home	Chatter	Opportunities 🗸 L	eads 🗸	Tasks 🗸 Files Accounts 🗸	Contacts 🗸	Campaign	is 🗸 More 🔻	
Felicia's View	•				New	Import	Add to Campaign	¥
20 Items - Sorted by Full Name	• Last upo	lated a few seconds ago				\$ *	tii ▼ C C	۲
Open - Not Contacted	(4)	Working - Contact	ed (12)	Closed - Not Converted (4)	Filters			-
Felicia Duarte Cloud Creations		Bertha Boxer bertha@fcof.net Farmers Coop. of Florida	•	Bill Dadio Jr 💌 bill_dadio@zenith.com Zenith Industrial Partners	Show m			
Jeff Glimpse jeffg@jackson.com Jackson Controls	•	FL Betty Bair bblair@abankingco.com	•	OH Carolyn Crenshaw	Add Filter		Rem	ove /
Mike Braund likeb@metro.com	•	American Banking Corp. PA		Ace Iron and Steel Inc.				
Metropolitan Health Services MD		Brenda Mcclure brenda@cardinal.net		Eugena Luce				
Phyllis Cotton pcotton@abbottins.net	۲	Cadinal Inc. IL		Pacific Retail Group MA				
Abbett Insurance VA		David Monaco david@blues.com		Pamela Owenby pam_owenby@hendricksontrad inn.com	*			

Figure 2-29. List view in the kanban view

- 1. To change the default list view from a grid list to kanban, click the **m** button.
- 2. Click Kanban.
- 3. Drag and drop records to the appropriate column to instantly update the status.

Mass Change Status

To change the status for a group of records at once, create a list view for that set of data.

- 1. Select the records that should be updated either individually or for all, as shown in Figure 2-18.
- 2. From the list view, click
- 3. Next, click Change Status. It's important to know that only the first three actions are displayed. Any additional status values are grouped under the arrow.
- 4. From the Change Status pop-up, select the updated status shown in Figure 2-30. From here, you can change the status for a group of records with one click.

Change Status	
2 Leads selected	
* Change Status	
Open - Not Contacted	•
	Council Council
	Cancel

Figure 2-30. Steps to change the status for a mass group of records

5. Click Save and view updated changes to selected records.

Create an Email Template

Standardize company emails in one central place with ease. Use merge fields to populate templates with custom values from a given record. Simply create and store on-the-spot email templates directly from an account, contact, or opportunity.

1. From a contact record, select Email, as shown in Figure 2-31.

New Task	New Event Log a Call Email
* From	Felicia Duarte <fduarte@cloudcreations.com></fduarte@cloudcreations.com>
То	Cc Cc
Bcc	fouarte@cloudcreations.com ×
Sub)ect	Enter Subject
Ford.	- Size - B I U A-
2= :=	1 1 1 0
;= :=	
2= ==	
	1 ± ± ₫ ∞
Powere	E E E Solution
Powere	1 ± ± ₫ ∞
Powere	ed by Salesforce www.salesforce.com/

Figure 2-31. How to create and save an email template

- 2. Type the email of the recipient(s).
- 3. Type the subject of the email.
- 4. Compose the email in the body of the text.
- 5. Select to include merge fields.
- 6. Click to save it as a new template.

Send an Email

From the Activity section in Salesforce, you select the Email tab to send an email. Enter the email of the recipient and subject, as shown in Figure 2-31.

- 1. Click the Activity tab from any record.
- 2. Type the subject for the email.
- 3. Type the body text for the email.
- 4. To relate the email to another record in Salesforce, search and enter the record in the Related To section.
- 5. Click Send.

Note To access stored templates, click and select Insert Template. Choose from the list of available templates.

Opportunities

Opportunities allow you to hold key information about any potential deal, order, or anything that may generate revenue (Figure 2-32). Deal tracking is an integral part to any business. Maximize and accelerate sales efforts effectively by keeping track of all open deals.

Use this powerful tool to prevent deals from slipping through the cracks.

		Q Search Opportunities an	nd more.				* - 🖽 î	🕸 A 🔒
Sales Home	Opportunities 🗸	Leads 🗸 Tasks 🗸	Files N	iotes 🗸 Accounts	v c	ontacts 🗸 Campaigns 🥆	🖌 Dashboards 🖌 Repo	orts 🗸 More 🕶
	ties 💌							New
17 Items - Sorted by Amount - L							\$ ·	i- c c T
Prospecting (6)	Qualification	(2) Needs Analysi	s (1)	Id. Decision Ma	(4)	Perception Ana (1)	Proposal/Price (3)	> Negotiation/Re
\$305,000	\$15,000	\$675,000	0	\$110,000		\$120,000	\$370,000	\$395,00
Aethna Home Pr 💌 Aethna Home Produ 3/31/2017 🛆	Dickenson Mobile G. \$15,000.00 Dickenson pic	United Oil Plant Sta S675,000,00 United Oil & Gas Co				Express Logistics SLA \$120,000.00 Express Logistics and Tr	American Bankin. American Banking Co. 3/31/2017	United Oil Installa S270,000.00 United Oil & Gas O
Aethna Home Pr 💌	12/2/2016	A 12/14/2016	A	Edge Emergency (* \$35,000.00	0	10/15/2016	United Oil Refine	11/16/2016
Aethna Home Produ 1/25/2017	Felicia's Test Account Felicia's Test Account 10/31/2017			Edge Communication			S270,000.00 United Oil & Gas Corp. 1/4/2017	United Oil Office F S125,000.00 United Oil & Gas C
Cloud Creations 💌 Cloud Creations HQ 1/10/2019 🔺				GenePoint Lab G S60,000.00 GenePoint	. –		University of AZ 1 👻 \$100,000.00	11/20/2016
				1/13/2017			University of Arizona	-

Figure 2-32. Opportunity list view

Create a New Opportunity

Track key information to help close open deals. Track samples that were sent, latest touch points, and next steps. Utilize or customize the Stage field to track where the deal is in the sales pipeline. Use the close date to forecast the expected close date of this deal.

- 1. Click the Opportunities menu.
- 2. Click New Opportunity and fill in the required fields found in Figure 2-33.

Opportunity Information	
Opportunity Owner	Amount
Felicia Duarte	
Private	* Close Date
	a
* Opportunity Name	Next Step
Account Name	* Stage
Search Accounts	None

Figure 2-33. Edit page on an opportunity

- 3. Type the opportunity name.
- 4. Type the expected close date and fill in any additional details about the opportunity. It's recommended to fill in more details about the opportunity.
- 5. Select the stage of the opportunity record.
- 6. Click Save to save an opportunity record.
- 7. Salesforce relates the account and opportunity records once saved.

Tip Not sure what to name the opportunity? Try to keep uniformity in your opportunity nomenclature and be specific. For example, Quantity + Product or Service of Interest.

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Opportunity Stage History

Use the Stage History area to keep track of changes to the stage. Any changes made to the stage, amount, probability, expected revenue, or close date are populated here. Select View all to see a list view of all the changes, as shown in Figure 2-34.



Figure 2-34. Stage History list on an opportunity record

Products

Products represent the product or service offered by your company. Store important product information in this object for sales reps to leverage during the sales process. The product description and pricing are powerful information for sales reps to leverage when out on the field or on a call.

Use products to associate with opportunities or quotes. Seamlessly update the opportunity amount to forecast potential incoming revenue. Use this information to report on best sellers, and so on.

Create a Product

Follow these steps to create products in Salesforce:

1. Click the Products tab (shown in Figure 2-35).

					Q, S	earch P	roduct	s and e	more						Г	_			٦			*	¥	٠	? 1	¢.	ņ.	ß
S S	ales	Home	Opportunities	~	Leads	×	Tasks	~	Notes	~	Accour	ts `	~	Contects	4	P	oducts	~	Ca	mpaign	s 🗸	Gri	oups	~	Cal	endar	N	tore •
	RODUCTS Recently	Vieweo	•											/	X	*												New
) Items - U	Jpdated a fe	w seconds aj	go											-								\$	•	m •	C'	1		٣
	RODUCT	AME			0.00	opuer	CODE					DDr	onu	CT DESCR	INTIC	-				0000	ALC:T	FAMILY	,					

Figure 2-35. Products tab

2. Click New (Figure 2-36).

Products 🗸	Campaigns 🗸	Group	s 🗸	Caler	ndar	More	• •
				•		New	•
-		\$ 7 -		C		e	-

Figure 2-36. New button on the products list view

3. Enter the product details. Type a descriptive name for the product and provide a description (Figure 2-37).

	Create Product
Product Information	
*Product Name	Active
Product Code	Product FamilyNone
Product Description	
	b.
	Cancel Save & New Save

Figure 2-37. The Create Product edit page includes Product Name, Product Code, Description, Product Family, and Active status

- 4. Click the Active check box to activate the product in Salesforce.
- 5. Click Save.
- 6. From the Related tab on the Product record, click Add Standard Price (shown in Figure 2-38).

PRODUCT 1 year	premium subscription	New Contact	New Opportunity	New Case	•
Product Code	Product Family				
RELATED	DETAILS				
Price E	Books (0)	-	Add	Standard Price	

Figure 2-38. Add Standard Price button

7. Enter the list price of the product, as shown in Figure 2-39, and associate it with the standard price book if no other price books are being used.

Product		Active		
1 year premium subscription	×			
Price Book		Product Code		
Standard Price Book	×			
List Price				
275.00				
Jse Standard Price				

Figure 2-39. Price book entry page

8. Click Save. Salesforce creates the new pricebook entry record.

Note How are products related with pricebooks? Products must be added to a pricebook in order to be available to an opportunity. Pricebooks can be used to record multiple pricing on a single product. Define prices for wholesalers, distributors, and other customers with Pricebooks.

Opportunity Products

Follow these steps to create opportunity products in Salesforce:

1. From an opportunity record, click the arrow in the Products list shown in Figure 2-40.



Figure 2-40. Products list on an opportunity record

- 2. Click Add Products.
- 3. Select the + button next to each product that should be attached. See Figure 2-41.

learch	Products				
G	enWatt Diesel 1000kW 🛛 🔲 GenWat	t Diesel 10kW 🛛 🔲 GenWatt (Diesel 200kW ×		
ims s	elected				
	PRODUCT NAME	PRODUCT CODE	LIST PRICE	PRODUCT DESCRIPTION	PRODUCT FAMILY
	GenWatt Diesel 1000kW	GC1060	\$100,000.00		
	GenWatt Diesel 10kW	GC1020	\$5,000.00		
	GenWatt Diesel 200kW	GC1040	\$25,000.00		

Figure 2-41. Product selection page

- 4. Click Next.
- 5. Select the quantity for this particular opportunity and for each product, as shown in Figure 2-42.

PRODUCT	QUANTITY	SALES PRICE	DATE	LINE DESCRIPT
GenWatt Diesel 1000kW	2.00	100000		
GenWatt Diesel 10kW	1.00	5000		
GenWatt Diesel 200kW	3.00	25000		
	/			

Figure 2-42. Opportunity product selection

- 6. Update the sales price for each product.
- 7. Enter a date or line description if desired.
- 8. Click Save.
- 9. View new opportunity product records successfully attached to this opportunity, as shown in Figure 2-43.

- 🕑 Ye	our changes are saved.		
mount 280,000.00	Opportunity Owner 🔒 FeliCia Duarte 🖍		
. Id. Decisio	on Perception Proposel/P Negotiat	ion Closed 🗸 Mark Stag	e as Complete
		Products (3)	•
ail	Add	GenWatt Diesel 1000kW Quantity: 2.00 Sales Price: \$100,000.00 Date:	¥
	Expand All	GenWatt Diesel 200kW Quantity: 3.00 Sales Price: \$25,000.00 Date:	*
More Steps		GenWatt Diesel 10kW Quantity: 1.00 Sales Price: \$5,000.00	•

Figure 2-43. Opportunity home page with new products attached

Opportunity Record Page

The product panel to the right in Figure 2-43 displays the products associated to the

opportunity. Click 💌 next to any product record to edit or delete from the opportunity.

The Stage workspace at the top of the page in Figure 2-43 is an interactive tool, which can be used to help sales agents move along their sales process.

Activity Timeline

Prioritize your day-to-day tasks by setting reminders and assigning tasks in Salesforce. Use activities to create a task, create an event, or log a call. In the Lightning Experience, the Activity timeline replaces the classic Activity History and Open Activities lists, as shown in Figure 2-44.

litle President	Company D&B Windows	Phone(2) ▼ (555) 121-2626	Email micha	el.frank(@dbwindows.com		
Open	- Not Contacted	Working - Contact	ed		Closed - Not Converted		C
ACTIVITY	CHATTER	DETAILS NEW	/S				
Log a Call	New Task New	v Event Email					
Recapyour	call					Add	
ilter Timeline						Expand All	C

Figure 2-44. Activity section within lead record

Use the comments section of the Log a Call tab to record important call details. Relate the contact to another account or opportunity.

Configuring Activity Feed

You can configure your activity feed by creating new tasks and events.

Create New Task

Follow these steps to create a new task, as shown in Figure 2-45:

Log a Call New Task New Event Email	
Subject	
Send 2017 Product Catalogue	
Due Date	
10/6/2017	1
Name	
🔀 Michael Frank	×
Related To	
🔀 🔻 Search Accounts	
Assigned To	
Selicia Duarte	×
* Status Not Started	

Figure 2-45. Steps to create a new task

- 1. Type the subject of your task.
- 2. Enter the task due date. The due date will be used to notify when a task is upcoming or overdue.
- 3. Relate the task to another record in Salesforce in the Related To section. By default, whoever is creating the task is the Assigned To person. Simply change this by clicking the x and selecting the person the task should be assigned to.
- 4. Select a status. Not Started, In progress, Completed, Waiting on someone else, and Deferred are the standard status values.
- 5. Click Save. A successful task record will display a message, as shown in Figure 2-46.



Figure 2-46. Successful task message

6. The task is saved and recorded in the Next Steps section. Tasks that have been completed are moved and displayed in the Past Activity area, as shown in Figure 2-47.



Figure 2-47. Next Steps section

Create a New Event

Keep track of any events that are related to your leads or contacts. An event will have a start date and an end date.

Follow the next steps to create a new event for a lead record and refer to Figure 2-48.

Log a Call New Task New Event Email			
Subject			
Product Roadshow			
* Start			
Date		Time	
11/22/2017		2:00 PM	0
* End			
Date		Time	
11/22/2017	*	3:00 PM	0
All-Day Event			

Figure 2-48. Steps to create a new event

- 1. Select the New Event tab, as shown in Figure 2-46.
- 2. Type the subject of the event.
- 3. Every event in Salesforce must have a start date and end date. Enter these details here.
- 4. Select the box if this is an all-day event.
- 5. If the event has a location, enter the location details in Location. This is optional.
- 6. If the event is related to an account, search for the related account to associate the two, as shown in Figure 2-49.

elated To	
🔽 🔻 Search Accounts	
Assigned To	
💄 Felicia Duarte	×

Figure 2-49. Related To and Assigned To fields on the event page

- 7. Tasks and events can be assigned to other Salesforce users. Choose who the task should be assigned to, as shown in Figure 2-49.
- 8. Click Save.

Create a Web-to-Lead Form

With a web-to-lead form, leads can instantly be generated into Salesforce from your web site. For example, create a Contact Us form on your web site to create new lead records in Salesforce. Create custom fields to track specific information from your web site and into Salesforce.

Follow these steps to create a web-to-lead form:

- 1. Click Setup.
- 2. Search for *web-to-lead* in the Quick Find section.
- 3. Click Create Web-to-Lead Form.
- 4. Standard and Custom fields are displayed in the Available Fields multiselect picklist, as shown in Figure 2-50. Add the fields to the Selected Fields column to display on your web-to-lead form.

Note Formula fields are not available to be selected.

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Select the fields to include on y	our Web-to-lead form:	
Available Fields	Selected Fields	NOTE: Would you like to add custom fields that you do fields to gather additional information from your webs
Salutation	First Name	heids to gather additional information from your webs
Title	Add Last Name Up	2
Website	Email	
Phone	Company	
Mobile	City	·
Fax	Remove State/Province Dov	
Street		
Zip		
Country	v	
	http://	ed return URL on your website, such as a "thank you" pa
Enable spam filtering (recomment reCAPTCHA API Key Pair Enable server fallback	ded) i i i i	

Figure 2-50. Web-to-Lead setup page

- 5. After users submit a web-to-lead form, they are taken to a specified return URL. Type the return URL here. Note that this is typically a thank-you page.
- 6. Select this check box to enable reCaptcha to prevent spam. This is recommended.
- 7. To use this feature, go to the Google reCaptcha web site and click Get reCaptcha to register domain. Once this is attained, enter the API key pair here.
- 8. If the Google servers are down, select this box to allow all traffic and leads to be generated without reCaptcha.

Note You can generate up to 500 leads within 24 hours. Any additional leads exceeding this amount are placed in a queue.

Create a Web-to-Lead Autoresponse Rule

Improve your client communication by sending out autoresponse messages to leads captured from your web site. As an example, create an autoresponse rule notifying the client that you received their submission and will reach out within 24 hours.

1. Click the New button shown in Figure 2-51.



Figure 2-51. Create a new web-to-lead auto-response rule

2. Name the auto-response rule shown in Figure 2-52.

New Web-to-Lead Auto-Response Rule
After you create your rule, select it from the auto-response rules list and add rule entries.
Save Cancel
Rule Name Incoming Lead
Active i
Save

Figure 2-52. Naming the auto-response rule

- 3. Select Active to activate the rule.
- 4. Click Save.
- 5. Select the created rule.
- 6. Click New in the Rule Entries section.
- 7. Determine the sort order and set your desired criteria. In this example, I'm creating an auto-response rule for all leads coming from my web site, as shown in Figure 2-53.
| Save Save & | New Cancel | | |
|------------------------|----------------------------|-----------|------|
| ntry will be processed | | | |
| | | | |
| | | | |
| | | | |
| iry | | | |
| ▼ : | | | |
| | Operator | Value | |
| 1 | | | 🔍 AN |
| | –None– | | AN |
| | | | |
| | = | | |
| | –None– | | AN |
| | = | | AN |
| | try will be processed | Increased | ry |

Figure 2-53. Setting the criteria for auto-response rule

- 8. Select the criteria for this rule to be triggered. This rule will be triggered when any lead has the source Web.
- 9. Type the name of the sender.
- 10. Type the email address of the sender.
- 11. Select the email template to be used.
- 12. Click Save. Now any lead that meets the criteria you set will automatically receive an email using the template you chose.

Create a Lead Assignment Rule

Automate your lead routing process by creating a lead assignment rule New leads can automatically be assigned to a user or queue based on the condition that is set.

1. Click Setup.

Rule Entry Edit

- 2. Search for Lead Assignment Rules in Quick Find and select it.
- 3. Click the New button.

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- 4. Give the rule a name and type it here.
- 5. Select Active to activate this rule; only one rule can be active at a time.
- 6. Click Save.
- 7. Select the rule name.
- 8. Click the New button in the Rule Entry section, as shown in Figure 2-54.

Lead Assignment Rules

Automatically assign leads to users or queues based on criteria you define. You can create multiple rules with different conc one rule can be active at a time.

Help

Click a rule name to add or edit rule entries.

	1	lew		
Action	Rule Name	Active	Created By	Created On
Rename Del	Sales Manager		Felicia Duarte	1/24/2017
Rename Del	Standard	1	Felicia Duarte	1/22/2017

Figure 2-54. List of lead assignment rules

- 9. Salesforce will evaluate each entry based on the sort order. Set the sort order for this rule.
- 10. Set the criteria for this rule by selecting the field, the appropriate operator, and the value. In this example, I am creating the rule for all leads coming from the state of California.
- 11. Determine whether leads that meet this criteria should be assigned to a user or queue. Type the name of the user or queue.
- 12. Click Save.

Create a Lead Queue

Manage your workload by controlling the way leads are assigned. Leads are bucketed into these queues for group members to view and accept. Lead records remain in queue until a user accepts.

- 1. From Setup, go to Queues.
- 2. Click the New button shown in Figure 2-55.

Queues					Help for this Page 🕜
processing by a	a group member. The specify the set of obj	records remain in the	queue until a user accepts	them for processing	records can be routed to await or they are transferred to another t are allowed to retrieve records
View: All			G H I J K L M N	0 P Q R S T	U V W X Y Z Other All
			New		
Label †	Queue Name	Queue Email	Supported Objects	Modified By	Last Modified Date
No records to	display.				

Figure 2-55. Lead queue

- 3. Type the name of the queue.
- 4. To notify group members that a lead has been added to a queue, enter the queue email and select Send Email to Members.
- 5. Select Lead and move to Selected Objects.
- 6. Choose the queue members as shown in Figure 2-56 and move them to Selected Members. You can define the selected members by users, roles, and groups.

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Queue Members	
them to the "Selected Member assign users to the queue, as	e, select a type of member, then choose the group, role, or user from the "Available Members" and move rs." If the sharing model for all objects in the Queue is Public Read/Write/Transfer, you do not need to all users already have access to the records for those objects.
Search: Users	for: Find Selected Members
User: Felicia Duarte User: Integration User User: Security User	Add

Figure 2-56. Adding members to a queue

7. Click Save. Now lead records will be placed in the queue if they meet the criteria. Queue members will have the ability to view those leads and pull from this queue.

Create a Campaign

Marketing professionals can use this powerful tool to track any marketing initiatives and efforts. Track the response and conversion rates to ultimately calculate return on investment (ROI). Use these metrics to confirm the effectiveness of your marketing efforts. Campaigns can be an effective tool to improve future marketing efforts.

Follow these steps to create a campaign and add campaign members:

1. Select New Campaign from the Campaign tab, as shown in Figure 2-57.

			Q Search	n Campaig	ins and r	nore								*	Ŧ		? 1	¢.	. .	
	Sales	Home	Opportunities	∨ Le	eads 🗸	Tasks	~	Notes	~	Accou	unts 🗸	Cor	tacts	~ (Camp	paigns	~	Мо	ore 🔻	
0	CAMPAIGNS Recently		ad -																N	lew
	Recently	view	ea 🗸																	
	n • Updated a fev													\$	•		C	1	0	7
		v seconds		ТҮРЕ		STATUS		STA	RT DA	ATE .	END I	DATE	RE	\$PONS			C ⁱ			Y

Figure 2-57. Campaigns tab and list view

2. Type the name of your campaign, as shown in Figure 2-58.

C	Create Campaign		
Campaign Information			Ì
Campaign Owner			
Felicia Duarte			
Campaign Name			
Dreamforce 2017			
Active			
Type Trade Show	*		
Status Planned	•		
Start Date			
	ii ii		-
		Cancel Save & New	Save

Figure 2-58. Campaign edit page

- 3. Fill in the details about your campaign Include the type of campaign, the start date and end date of the campaign, and other important information.
- 4. Click the Active check box to make the campaign active and current.
- 5. Click Save.

Once the campaign is active, you'll want to add campaign members. This will tie everything together. Campaign members are the leads and contacts that you associate to any given campaign.

Note that a lead and contact have a many-to-one relationship. This means that they can be associated to many campaigns. Click Add Leads to associate lead records or click Add Contacts to associate contact records (Figure 2-59). These leads and contacts are considered campaign members to your campaign.

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Figure 2-59. Adding leads and contacts to your campaigns as campaign members

6. Select the records that should be associated as campaign members and select Add to Campaign, as shown in Figure 2-60.

8	Recently Viewed -				6	New	Import	A	dd to Ca	ngiaqma
3 Itam	rs selected			_		۰ ئ	Π.	C*	1	0 T
	- NAME	ACCOUNT NAME	ACCOUNT SITE	PHONE	EMAIL	con	TACT O	WNER	ALIA	5
1	Michael Frank	D&B Windows		(555) 626-1212	michael/rank@dbwind	FDu	ar			
2	 Michael Scott 	Dunder Millin			michaelscott@dunder	FDu	ar			*
3	Ayden James	Cloud Creations HQ		(555) 827-6877	ajames@cloudcreations	FDu	ar			

Figure 2-60. Adding campaign members

Campaign members provide reporting on the response rates of your campaign. Salesforce tracks these efforts by using these standard values: Sent and Responded.

- 7. Enter the campaign that this record should be associated with.
- 8. Define the member status as existing or update the member status as Sent or Responded (see Figure 2-61).

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Add to Campaign						
3 Contacts Selec	ted					
* Campaign						
Dreamford	e 2017					×
* Member Status	Sent					
Existing campaigr	member					
Keep existing	Member Status					
C Update to the	selected Member	Status				
				C	ancel	Submit

Figure 2-61. Steps to associate the campaign and status that the selected campaign members should have

9. Click Submit. Salesforce will generate a success message, as shown in Figure 2-62.



Figure 2-62. Campaign member success message

Summary

Sales Cloud provides effective tools to connect your sales and marketing teams. Sales Cloud sets the foundation for your CRM needs and provides insightful information into your opportunity pipeline.

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CHAPTER 3

Salesforce Service Cloud

Salesforce Service Cloud allows your customer service representatives and support representatives (users) to manage, track, and resolve customer inquiries and issues. The Service Cloud application uses the Case object to capture all the details needed to help them to resolve the inquiries and issues. Your users can manually create cases for requests via phone and in person or accept cases from multiple channels (e.g., web forms, email, real-time web chat, online communities, and social media outlets). You can allow your users to efficiently manage these channels by setting up case assignment rules. The Salesforce Service Cloud application also allows you to create case escalation rules when an issue needs to be escalated to management. Tracking the various customer inquiries your company brings in could even help you to establish new procedures. It also will help you to understand any weak points within your company. Figure 3-1 shows the internal communication that can take place in Service Cloud. In short, the application can help to resolve issues with customers faster.

Seeking gu	uidance on electrical wiring insta	llation for GC5060		+	Follow	Edit Delete Change	Owne
ority Status w New	Case Number 00001002						
FEED RELA	ATED			Case Owner	n	Status	
Post Poll				Case Number 00001002		Priority Low	
Share an update.			Share	Contact Name Stella Pavlova		Contact Phone (212) 842-5500	
atest Posts 👻		Q, Search this feed	ď	Account Name United Oil & Gas Corp	. /	Contact Email spawlova@uog.com	
August 31, 20	Managment – Rachelle Hoffman created a task. 017 at 9:35 PM		•	Type Electrical		Case Origin Web	
Meet with M	Managment			Case Reason Installation			
Uko 🕒 Comm		rmore details		Web Email		Web Company	
B Write a con				Web Name		Web Phone	
	vith Cilent – Rachelle Hoffman created an event. 017 at 9.34 PM			Date/Time Opened 4/21/2017 9:01 AM		Date/Time Closed	
-				Product GC3060		Engineering Req Number	r

Figure 3-1. Internal communication

Overview of Salesforce Case Management

Salesforce case management allows users to capture the necessary details of the Case object to manage and successfully resolve their case. Users can see important case details in 29 standard fields as well as create their own custom fields. They can keep track of the status of a case with a drop-down field with values such as New, Working, Escalated, and Closed. Users can also access all the necessary connected objects such as the account, contact detail, and product information. Giving users access to the account and contact details will allow them to get a full view of the customer submitting the case. They can assign the case to a High, Medium, or Low priority based on the case submission as well as set up their page layout to best fit their needs and the needs of the company.

Introduction to Standard Case Fields and Related Lists

Salesforce offers a number of standard fields via its Case object that are displayed in Figure 3-2. Before you decide to create a custom field, we recommend that you leverage an existing standard field instead. The majority of Salesforce standard fields have

back-end automation applied to them. Because every business is different, you will most likely need custom fields, but why re-create the wheel if it's not necessary?

riority ow	Status New	Case Number 00001002		
DETAILS	FEED			
✔ Case In	formation			
Parent Case				
Case Owner			Priority	
B Rachelle	Hoffman	2	Low	/
Case Number			Case Reason	
00001002			Installation	/
Status			Case Origin	
New			Web	/
Escalated			Date/Time Opened	
		/	4/21/2017 9:01 AM	
Account Name	,		Date/Time Closed	
United Oil & 0	Gas Corp.	/		
Туре				
Electrical				

Figure 3-2. Case information fields

You will find the following fields in the Case Information section (as shown in Figure 3-2):

• *Parent Case*: Attach a case that currently exists and was the reason for the new case.

Note If you use this function, it is essential to add the related list "Related Cases" to the case layout to get a full view of all the cases attached to a parent case.

- *Case Owner*: Assign the user who is primarily responsible for managing the case.
- *Case Number*: This is an automatically generated number used to reference a case both internally and externally.

Tip Use this case number to allow your users and customers to reference it when addressing the case. Apply it to automated emails.

- *Status*: Use this field to track the current status of a case. Utilize the existing values (New, Escalated, and Closed) or add your own.
- *Contact Name*: Attach the point of contact who submitted the case.
- *Escalated*: Use this check box to apply workflow rules (discussed later in the chapter) to automated escalations. Additionally, select this box and see the newly added red arrow next to the case number indicating that the case has been escalated. Utilize this field in reports and dashboards to keep an eye on your most important cases.
- *Account Name*: After attaching the contact, watch the account get autopopulated with the account details of the contact. If the case belongs to an account other than the attached contact, overwrite the field with the necessary account.
- *Priority*: Apply the necessary priority to the case using the standard values of High, Medium, or Low. Utilize this field in reports and dashboards to keep an eye on your most important cases.
- *Type*: Use this field to track the types of cases your teams are managing. Use this field to help determine what FAQs should be developed or updated.
- *Case Reason*: Use this field to track the reasons why a client contacted you. You can also use this field to help update FAQs, internal process, and so much more.
- *Case Origin*: Use this field to track where your cases are coming from, whether it be an online form, email, phone, or in person.

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- *Date/Time Opened*: This field is automatically populated with the date and time the case was created.
- *Date/Time Closed*: This field is automatically populated with the date and time the case was closed. Cases can be closed by changing the case status to a closed status or via many other ways (e.g., API, import update, automation rules, etc.).

Note Salesforce reports come with an Age field that tracks the duration in days. However, this field is not a field that you can put on your case layout. You can create a formula field if you would like your users to see the duration a case has been (or was open for) on the case page layout.

• *Closed When Created*: Users are able to create a new case and close it right away. When this happens the checkbox is marked true for this field and can be used in reports.

Under Contact Information in Figure 3-3, you'll find the following fields:

• *Contact Phone, Contact Mobile, Contact Fax, and Contact Email*: These fields pertain to the contact attached to the case. They are all formula fields that are used to map fields from one object to another. Since these are formula fields, they are locked fields that can't be updated from the Case object. Instead, you'll need to go to the contact record and update the information there.

Under Web Information in Figure 3-3, you'll find the following fields:

• *Web Email, Web Company, Web Name, and Web Phone*: When the web-to-case function is configured (we'll cover this later in the chapter), cases will be automatically created in Salesforce. These fields will be populated with the corresponding data from your web form.

Under Description Information in Figure 3-3, you'll find the following fields:

• *Subject*: Use this field as the incoming subject line of an email when the email-to-case feature is configured or as a quick reference to what the case is about. Notice that this field's data is replicated at the top the page layout as well.

- *Description*: Use this field as the incoming body of an email when the email-to-case feature is configured or as a long description of the case.
- *Internal Comments*: Use this field to create case comments while you are on a call with a client.
- *Created By*: This field is found on every record in Salesforce. It captures who and at what date and time the case was created.
- *Last Modified By*: This field is also found on every record in Salesforce. It captures who and at what date and time the case was last updated or modified.

Tip Don't worry if these fields aren't enough or don't work for your company. The default positions of some of these fields are easily modified. Salesforce allows up to 500 custom fields on the Case object. You can create fields for text, dates and time, numbers, currency, percents, picklists, multiselect picklists, check boxes, emails, phones, and URLs.

Туре			
Electrical	1		
✓ Contact Information			
Contact Name		Contact Mobile	
Stella Pavlova	1	(212) 842-5501	
Contact Email		Contact Phone	
spavlova@uog.com		(212) 842-5500	
		Contact Fax	
		(212) 842-5501	
✓ Web Information			
Web Name		Web Company	
Rachelle Hoffman	1	Cloud Creations	/
Web Email		Web Phone	
rachelle@cloudcreations.com	1	(800) 951-7651	1
✓ Description Information			
Subject			
Seeking guidance on electrical wiring in	stallation for G	25060	1
Description			
I am seeking guidance for the wiring in:	stallation of GC	5060.	
Created By		Last Modified By	

Figure 3-3. More case fields

Next, we'll discuss the standard related list found on the Case object.

Figure 3-4 shows the standard Case object related list. A *related list* is another object within your Salesforce organization that is connected to the current object you are viewing. The related list you'll find on the Case object includes the following:

• *Solutions*: This related list houses articles created in another Salesforce object called Solutions. Solutions are used to house content that either can be used to help you user close a case faster or can be used to provide information to the case contact. This object works with another Salesforce product called Knowledge. Solutions and Knowledge are important products because they provide resources to your users that help them move a case forward.

- *Open Activities*: These records are outstanding or future tasks or events that your user created. Any task or event that hasn't been completed will show up here.
- *Activity History*: These records are tasks, emails, call logs, and events that your user has completed.
- *Case Comments*: These records provide information pertaining to the case. Your user will add important case comments to this area.
- *Attachments*: These records reflect outside documents that pertain to the case. This could be current client contracts or screenshots provided by the client about an error they are experiencing.
- *Case History*: This content includes all the field-level changes made to the Case object. You can set field tracking and choose what fields are most important (we'll cover this later in the book).

Note Salesforce also offers other related lists. Although not on a standard page layout, these can be easily added to your page layout. One that is worth noting is Contact Roles, which allows you to add multiple contacts to one case record. Another is the related list called Emails, which is used when you have enabled the email-to-case function (explained later in this chapter). If set up in your email account properly, your users can stay in Salesforce and never have to bounce between the two (also covered later).

Tip Salesforce allows you to relate objects to one another. Should your Case object need multiple records of another, you can create a junction object. For instance, if you would like to relate multiple products that are involved in one case, you can do so. Creating custom objects is simpler than you may think.

📕 Open Activ	vities (1)	¥
Meet with Manag	ment	¥
Name:		
Status:	In Progress	
Priority:	Normal	
		View All
📕 Activity His	story (1)	¥
Follow Up with Cil	lent	
Name:		
Assigned To:	Rachelle Hoffman	
Last Modified Date	/Time: 8/31/2017 9:34 PM	
		View All
	(0)	
🗡 Case Comr	ments (0)	*
Attachmen	nts (1)	*
	103_Service Management + 7.2MB + docx	
Aug 31, 2017	· 7.2MB · DOCK	
		View All
Case Histor	ry (1)	*
Date:	9/9/2017 4:57 PM	
Fleld:	Description	
User:	Rachelle Hoffman	
Original Value:		
New Value:		
		View All

Figure 3-4. Case layout with standard related lists

Creating a New Case Record

You can manually enter a case by first navigating to the Case object (see Figure 3-5) and then clicking the New button. Once a record has opened, you can begin filling in the case details by adding the contact name, account name, priority, case origin, type, and case reason (see Figure 3-6). Make sure to capture the client's explanation or reasoning for reaching out in the Subject and Description fields (Figure 3-6). While you are adding these details, utilize the Internal Comments field if necessary. If you have created custom fields for your Case object, make sure to train your users on filling in these details as well.



Figure 3-5. If you are not already on the Cases tab, use the down-facing arrow next to the object title to navigate to the Cases tab

The following steps are recommended to create a new case record (Figures 3-6 and 3-7):

- 1. Type the contact name and click the magnifying glass next to the field to attach a contact to the case.
- 2. The account name will automatically be assigned to the account of the contact you attached in the contact field.

Tip Accounts and contacts can be disabled as required fields.

- 3. Change the priority of the case by clicking in the field. Select the appropriate value from the provided values.
- 4. Select the case origin by clicking into the field and select the appropriate value. Notice the * next to this field. This means that it is required.

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- 5. Select the type and case reason by clicking into the field and selecting the appropriate value.
- 6. Fill out any custom fields appropriately if necessary at this time.

	Create Case	
Case Information		
Parent Case		
Search Cases		
Case Owner	Priority	3
Rachelle Hoffman	Medium	1.
Case Number	Case Reason	
	5None	•
* Status	Case Origin	
New	None	4 *
Escalated		
	2	4
Account Name		
Search Accounts		
Туре		
None	5	
Contact Information	-	
Contact Name		
Search Contacts		
b Information		
Web Name	Web Company	
Web Email	Web Phone	
		Cancel Save

Figure 3-6. Creating a case, steps 1 to 6

- 7. Type in the subject of the case.
- 8. Type in the description of the case.

Contact Information		
Contact Name		
Search Contacts		
Web Information		
Web Name	Web Company	
Web Email	Web Phone	
Description Information		
Subject		
Description	8	

Figure 3-7. Creating a case, steps 7 and 8



9. Once complete, click Save.

Tip Utilize the case Date/Time Opened and Date/Time Closed fields to generate reports about case duration. Also, the case type and reason fields can help define client and internal FAQs.

Collaborating with Your Team on a Case Record

Managing and efficiently closing cases can take more than one person being involved from your team. Users can utilize the case feed found in their case record to quickly communicate with others on your team. They can also direct a message to any Salesforce user who has access to the case record. To mention a comment to a user, you use the @ symbol followed by the user's name and, once the name populates below the text area, click the hyperlinked name. You'll also see that every action is tracked in the case feed for a complete view of the case and what happened throughout its duration. The feed filters on the left side of the case record help you to quickly navigate to case's feed-related items. Feed details will display from the oldest at the bottom to the newest created at the top. This gives you a quick view of the latest conversations or work done on the case. Figure 3-8 shows the functions of the case feed.

DETAILS FEED		
Post Poll More		
Share an update		Share
atest Posts 🔻	Q. Search this feed	C
Rachelle Hoffman updated this record. Just Now		•
Status New to Working		
Write a comment		
Meet with Managment – Rachelle Hoffman created a task. August 31, 2017 at 9:35 PM		¥
YE Meet with Managment		
View more deta	ils	

Figure 3-8. Case feed

To collaborate with your team, follow these steps:

- 1. Access the case feed by clicking the tab Feed.
- 2. Utilize the post area to communicate with your team on the case.

- 3. Utilize the case feed to track all conversations throughout the case duration.
- 4. The case feed captures changes made to the case status.
- 5. The case feed also tracks activities such as the Log a Call activity and other general tasks (see Figure 3-9).

See	eking guidan	ce on electrical wiring installa	tion for GC5060		
Priority Low	Status Working	Case Number 00001002			
DETAIL	S FEED	1			
Post	More	2			
Sha	re an update	\sim			Share
Latest Po	sts 🔻			Q, Search this feed	C
	00001002 - Rache 1m ago	e Hoffman			•
@Tyson J	ones Did you follov	-up with Gary on the product detail?			
0	Write a comment				
	Rachelie Hoffman s Sm ago	pdated this record.			¥
Status	Working	4			
I Uke	Comment				
0	Write a comment				
	Meet with Managm August 31, 2017 at 9	ant – Rachelle Hoffman created a task S5 PM			٣
ΎΞ	Meet with Manage	sent			
			View more details		

Figure 3-9. Utilizing feed filters to quickly navigate to the all call logs, case notes, status changes, and task and events

Case Automation

Salesforce offers the ability to automate functions such as automatically assigning a case to a queue or to a specific user. Salesforce also allows you to create rules to auto-respond to your clients related to a case based on specific criteria. You can also configure case escalation rules based on criteria that will automatically assign the case to an escalated case. Along with this case escalation, you can apply automated notifications to be sent when this criterion is met. You can also route cases from your email or from a web form. You are also able to adjust some support settings that allow you to further customize your case automation. Figure 3-10 shows a case queue.

			Q. Search Cases and more			* - 🖽 ?	章 桑	8
	Cloud Creations Her	e Chatter Accounts 🗸 Contacts 🗸	Cases V Opportunities V Reports V I	Dashboards 🗸 Notes 🗸				
	Case Queue 👻						E	New
0 Her	ns - Sorted by Case Number - Filtered	oy Owner Name - Updated a few seconds ago				• · = ·	e / e	Y
	CASE NUMBER 1	CONTACT NAME	SUBJECT	STATUS	PRIORITY	CASE OWNER ALIAS		
1	00001000	Rose Gonzalez	Starting generator after electrical failure	Working	Hgh	Case Queue		Į.
2	00001004	Babara Lavy	Maintenance guidelines for generator u	Working	Medium	Case Queue		
3	00001010	Tom Ripley	Maintenance guidelines for generator u	Working	Low	Case Qualue		Ē
4	00001014	John Bond	Delay in Installation; spare parts unavail	Working	High	Case Queue		
5	00001015	Edna Frank	Maintenance guidelines for generator u	New	Low	Case Queue		1
6	00001024	Lauren Boyle	Design Issue with mechanical rotor	New	Low	Case Queue		
7	00001025	Lauren Boyla	Motor design hindering performance	Working	Medlum	Case Queue		1
	00001026	Test Hoffman		New	Medium	Case Quaue		1

Figure 3-10. Case queue

Creating Case Queues

A case can be sent to a queue in many ways. You can automatically assign a case to a queue when it created or throughout the life of the case because a change to the case record can send it to a queue. You can think of a queue as a holding tank. This holding tank will allow you to give multiple users access to it and give them the option of accepting new cases. Instead of assigning a case to a specific owner, you can assign it to a queue using the case assignment rules. In Figures 3-11 through 3-14, you'll learn how to create a queue in Salesforce. The steps are as follows:

- 1. Navigate to the Setup menu by clicking the settings cog icon in the upper-right corner of the Salesforce window.
- 2. Using your search area, enter Queue. Click Queues under Users.
- 3. Click the New button.

-	Q,	Search Salesforce				🔄 🖬 ? 🌣 🐥 😁
E Setu	Object Manager 🐱					
Q queue	Queues					
✓ Users	Queues					Help for this Page 😌
Queues • Environments	Queues allow groups of users to user accepts them for procession from the queue.	o manage a shared workloa ng or they are transferred to	d more effectively. A queue another queue. You can sp	is a location where	routed to await processing by a group r ported by each queue, as well as the se	nember. The records remain in the queue until a it of users that are allowed to retrieve records
~ Jobs	View: All V Edit Cruster N	on Vice		-		0 P 0 R 5 T U V W X V 2 Oter M
Apex Flex Queue				New		
	Action Label * Ent I Del Case Queue	Gueue Name Case, Queue	Gueue Email	Supported Objects	Modified By Hoffman, Rachelle	Last Modified Date

Figure 3-11. Creating a case queue

- 4. Create a user-facing label for the queue and hit your Tab key. Salesforce will create the queue name.
- 5. Put an email address in the Queue Email field if you want to receive a notification that a new case was added to the queue.
- 6. Select the box Send Email to Members if you want the users assigned to that queue to receive an email when a new case arrives in the queue.



Figure 3-12. Naming your queue and setting notification options

7. Select the Case object and click the arrow to move it to the Selected Objects section.



Figure 3-13. Selecting the object for your queue

8. Using the search area, select in the drop-down whether you want to search for a specific user, public group, role, or role and subordinates.

Note Selecting the option Roles and Subordinates gives access to the specific queue to a specific role and all that fall under the role. For instance, if your CEO sits at the top of your role hierarchy and you give the CEO access using this function, it gives all below the CEO role access as well.

- 9. Select the specific user, public group, role, or role and subordinates and use the right-facing arrow to move it into the Selected Members area.
- 10. Click Save.



Figure 3-14. Select the users, groups, roles, or roles that need to have access to this queue.

Tip Queues can be used for more than just cases. You can set up lead queues and set up lead assignment rules just like you can on cases.

Creating Case Assignment Rules

Now that you have created your first queue, it's time to automatically assign cases to that queue or to a specific owner. You can create case assignment rules based on specific criteria in the case and related records to the case. For instance, you can create an assignment rule to automatically assign all cases that came in for a specific account or contact to a specific user. Or you can assign a case to a queue based on the case origin, case reason, case type, or any other field found in the case record. Some companies create queues for VIP or platinum clients and only allow their most experienced users to handle these cases. Figures 3-15 through 3-20 show you this process. The step-by-step process is as follows:

- 1. Navigate to the Setup menu by clicking the settings cog icon in the upper-right corner of the Salesforce window.
- 2. Using your search area, enter **Case Assignment**. Click Case Assignment under Service.
- 3. Click New to start the case assignment rule.

	Q Search Salesforce			🔄 🖬 ? 🌣 🖡 👼
Setup H 2	pject Manager 🗸 🗸			1
Q case assignment	Case Assignment R	Rules		
 Feature Settings Service 	Case Assignment R	Rules		Help for this Page 🥹
Case Assignment Rules	at a time		eria you define. You can create	e multiple rules, but only one rule can be active
		New		
	Action Rule Name	New	Created By	Created On

Figure 3-15. Accessing case assignment rules

- 4. Name the rule and click Save. You can activate the rule now by checking the Active check box or hold off and activate it later.
- 5. Click Save.



Figure 3-16. Creating a case assignment name and activating it

After saving the rule name, it will return you to the case assignment area. Click the rule name you just created.

Case	Assignment R	ules			
Case As	ssignment R	ules			Help for this Page 🥝
at a time.	assign cases to users o me to add or edit rule e		on criteria you def	ine. You can create multiple r	rules, but only one rule can be active
		New			
Action	Rule Name	5	Active	Created By	Created On
Rename De	Case Assignment 1			Rachelle Hoffman	9/9/2017
Rename De	Standard	-	1	Rachelle Hoffman	4/21/2017

Figure 3-17. Retrieving your case assignment rule

6. Click the New button.

Note In Figure 3-18 notice the Active box above Modified By. This is where you will activate the rule after you have completed it using the Active check box.

Case Assignment Rule	ent 1		Help for this Page
Add rule entries that spe	cify the criteria used to route cases. You can re-	order rule entries on thi	s page after you create them.
Rule Detail	Edit		
Rule Name	Case Assignment 1	Active	
Created By	Rachelle Hoffman, 9/9/2017 7:34 PM	Modified By	Rachelle Hoffman, 9/9/2017 7:34 PM
Created By Rule Entries		Modified By	Rachelle Hoffman, 9/9/2017 7:34 PM

Figure 3-18. Creating the rule criteria for your case assignment

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- 7. If this is your first case rule assignment, type the number 1 into the Sort Order field. If you have configured many rules, the Sort Order field tells Salesforce which rules to run first. Once a rule runs and assigns the case, it will not run other rules on the same case. Assign the sorting to all your rules according to importance.
- 8. In step 2 you create the rule criteria. The rule criteria tells Salesforce that if the criteria you enter here is true, then it assigns the case to the specified location (steps 9 and 10).
 - a. To start this process, you'll first need to click None in the field column. Here you will select the field that Salesforce should evaluate for the rule. This can be the case type, case reason, case origin, account, contact information, or any field criteria found in the case, account, or contact.
 - b. Choose the appropriate operator. For instance, if you want every case type that equals a specific value to be auto-assigned to specific users, you would choose the operator "equals" and select those values.
 - c. Choose or enter the appropriate value or outcome in which the case will auto-assign.
 - d. You can also configure your filter logic by clicking Add Filter Logic. This allows you to change the logic from being "all" the field criteria (using "and") to "or." For example, you can say if the case type is Problem OR the case origin is Email. The standard setup would make that logic sentence be "If the case type is Problem AND the case origin is Email."

Rule Entry Edit Case Assignment 1			Help for this Pag
Enter the rule entry Save Save & New Can	cel		
Step 1: Set the order in which this rule entry will be processed	_		= Required Informati
Sort Order			
Step 2: Select the criteria for this rule entry			
Due this sale if the deliveries in the second second			
Run this rule if the following criteria are met			
Field	Operator	Value	
	Operator b	Value Email	and AND
Field	equals		AND
Field Case: Case Origin	equals None	Email	
Field Case: Case Origin None	equals None None	Email	AND

Figure 3-19. Setting up the field criteria for the case assignment rule

- 9. Choose to assign the case to a specific user or to the queue you set up in the previous section.
- 10. Select an email template that you would like to autosend to the user or queue.
- 11. Click Save or click Save and New to set up another case assignment.

Step 3: Select the us	9 Jeue to assign the case to			
Queue 🔻	Case Queue	9	Email Template	Support: Case Assignment N 🕙
	Do Not Reassign Owner			10
Step 4: Optionally, sel	ect predefined case teams to ad	ld to the case		-
Predefined Case Teams				
	9			
	2			
	9			
Add Row				
Replace Any Existing Pred	efined Case Teams on the Case			
	Save Save	& New Cancel		

Figure 3-20. Assigning the specific user or queue and send them a notification

Note Step 4 provides a functionality that is not a Lightning component and would have to be set up in Classic.

Creating Case Auto-Response Rules

Case auto-response rules allow you automate communication with your client based on field-level change. For instance, if you want an email sent to your client when the status of the case changes from one value to another, you can do that. Any field-level change from a value to another can activate this email send or another automation. Figures 3-21 through 3-26 will walk you through creating case auto-response rules.

- 1. Navigate to the Setup menu by clicking the settings cog icon in the upper-right corner of the Salesforce window.
- 2. Using your search area, enter **Case Auto-Response**. Click Case Auto-Response Rules under Service.
- 3. Click New to start the Case Auto-Response rule.

	Q Search Salesforce	🗟 - 🖪 ? 🌣 🐥 👼
2 Setup Home Obje	ct Manager 😽	1
Q, case au	SETUP Case Auto-Response Rules	
2 Feature Settings ~ Service	Case Auto-Response Rules	Help for this Page 🥹
Case Auto-Response Rules	New	
	No rules specified.	

Figure 3-21. Accessing case auto-response rules

- 4. Name the rule and click Save. You can activate the rule now by checking the Active check box or hold off and activate it later.
- 5. Click Save.

Case Auto-Response Rules	
New Case Auto-Response Rule	Help for this Page 🥹
After you create your rule, select it from the auto-response rules list and add rule entries.	
	Required Information
Save Cancel	
Active i	
5 Save Cancel	

Figure 3-22. Naming your case auto-response rule

6. After saving the rule name, it will return you to the case assignment area. Click the rule name you just created.

Case	e Auto-Response Rules			
	uto-Response Rules			Help for this Page 🥹
Automatically	r determine which email templates to use when sending) auto-response messages to	r new cases.	
Action	Rule Name 6	Active	Created By	Created On
Rename D	Auto respond to email-to-case cases	✓	Rachelle Hoffman	9/9/2017

Figure 3-23. Retrieving your case auto-response rule

7. Click the New button.

Note In Figure 3-24, notice the Active check box above the Modified By field. This is where you can activate the rule after you have completed it using the Active check box.

ase Auto-Respo		email-to-case cases		Help for this Page
		the criteria and email template to use to respond to	cases. You can reorder rule	entries on this page after you create them.
Rule Detail		Edit		
	Rule Name	Auto respond to email-to-case cases	Active	1
	Created By	Rachelle Hoffman, 9/9/2017 8.08 PM	Modified By	Rachelle Hoffman, 9/9/2017 8:08 PM
		7		

Figure 3-24. Creating your new rule criteria for the case auto-response rule

- 8. If this is your first case auto-response rule, type the number **1** into the Sort Order field.
- 9. In step 2 you create the rule criteria. The rule criteria tells Salesforce that if the criteria you enter here is true on the case, then send the email (steps 9 and 10).
 - a. To start this process, you'll first need to click None in the field column. Here you will select the field that Salesforce should evaluate for the rule. This can be the case type, case reason, case organ, account, contact information, or any field criteria found in the case, account, or contact.
 - b. Choose the appropriate operator. For instance, if you want every case type that equals a specific value to automate the email, you would choose the operator "equals" and select those values.
 - c. Choose or enter the appropriate value or outcome in which the case will auto send the email.
 - d. You can also configure your filter logic by clicking Add Filter Logic. This allows you to change the logic from being "all" the field criteria (using "and") to "or." For example, you can say if the case type is Problem OR the case origin is Email. The standard setup would make that logic sentence be "If the case type is Problem AND the case origin is Email."

Enter the rule entry	Save Save & New Cance	4		
Step 1: Set the order in which this ru	le entry will be processed			= Required Informat
Sort Order	8			
Step 2: Select the criteria for this rule	- antru			
	eendy			
Run this rule if the following criteria are m				
		Operator	Value	
Run this rule if the following criteria are m		and the second se	Value	a AND
Run this rule if the following criteria are m	iet T	equals		a AND
Run this rule if the following criteria are m Field Case: Priority	vet v]:	equals	High	
Run this rule if the following criteria are m Field Case: Priority None	vet v]:	equals None	High	AND

Figure 3-25. Creating the criteria for your case auto-response rule

- 10. In step 3, you'll need to provide the name of who the email is coming from.
- 11. Enter the sender's email address in the Email Address field.
- 12. Provide a reply-to address should the client want to respond to the email.

Note You can only use one of your user's emails or an email that you set up as an organization-wide email.

- 13. Assign the email template that you want to be sent for this autoresponse rule.
- 14. Once steps 1 through 4 are complete, click Save.



Figure 3-26. Setting up who the email is coming from and your email template

Creating Case Escalation Rules

Case escalation rules allow you to create automation for when a case will get escalated and what actions will take place thereafter. Like the other rules that you have created in the previous section, you'll be able to determine when the case gets escalated based on field-level criteria of the case. Once the field-level criteria are met, then you can set actions such as sending a notification email, reassigning the case to another user, and notifying that user. Figures 3-27 through 3-34 show the setup. The steps include the following:

- 1. Navigate to the Setup menu by clicking the settings cog icon in the upper-right corner of the Salesforce window.
- 2. Using your search area, enter **Escalation Rules**. Click Escalation Rules under Service.
- 3. Click New to start the escalation rule.

	Q Search Salesforce			🗟 🖬 ? 🏚 🐥 😁
Setup Home	Object Manager 🗸 🗸			
Of Escalation R	SETUP Escalation Rules			
2 Service Escalation Rules	Case Escalation Rule	3	to take. After you create a rule	Help for this Page 🥹
	Action Rule Name	New	Created By	Created On
	Rename Del Standard	1	Rachelle Hoffman	4/21/2017

Figure 3-27. Navigating to the case escalation rules

- 4. Name the rule and click Save. You can activate the rule now by selecting the Active check box or hold off and activate it later.
- 5. Click Save.

\$		
New Case Escal	ation Rule	Help for this Page 🥹
After you create your rule, sele	ct it from the escalation rules list and add rule entries.	
		= Required Information
4	Save	
	Case Escalation Rule 1	
Active i		
	5 Save Cancel	

Figure 3-28. Creating your name for your case escalation rule

6. After saving the rule name, it will return you to the case assignment area. Click the rule name you just created.
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Esca	lation Rules			
Case E	scalation Rules			Help for this Page 🤇
Automatically	determine when cases should escalat	e and what actions to take. After	you create a rule, select if from t	he rules list and add rule entries.
		lane -		
Action	Rule Name	lew Active	Created By	Created On
			Created By Rachelle Hoffman	Created On 9/9/2017

Figure 3-29. Retrieving your case escalation rule

7. Click the New button.

Case Escalation Rule	Rule 1		Help for this Page 🥑
Add rule entries that specify	the criteria used to escalate cases. You can reorde	r rule entries on this page af	ter you create them.
Rule Detail	Edit		
Rule Name	Case Escalation Rule 1	Active	√
Created By	Rachelle Hoffman, 9/9/2017 8:44 PM	Modified By	Rachelle Hoffman, 9/9/2017 8:44 PM
Rule Entries	New		Rule Entries Help ?

Figure 3-30. Creating the criteria for your case escalation rule

Note In Figure 3-30, notice the Active check box; this is where you will activate the rule after you have completed it using the Active check box.

8. If this is your first case escalation rule, type the number 1 into the Sort Order field. If you have configured many, the Sort Order field tells Salesforce which rule to run first. Once a rule runs and executes the action, it will not run other rules on the same case. Assign the sorting to all your rules according to importance.

- 9. In step 2 you create the rule criteria. The rule criteria tells Salesforce that if the criteria you enter here is true on the case, then it will send the email (steps 9 and 10).
 - a. To start this process, you'll first need to click None in the field column. Here you will select the field that Salesforce should evaluate for the rule. This can be the case type, case reason, case organ, account, contact information, or any field criteria found in the case, account, or contact.
 - b. Choose the appropriate operator. For instance, if you want every case type that equals a specific value to automate the email, you would choose the operator "equals" and select those values.
 - c. Choose or enter the appropriate value or outcome in which the case will autosend the email.
 - d. You can also configure your filter logic by clicking Add Filter Logic. This allows you to change the logic from being "all" the field criteria (using "and") to "or." For example, you can say if the case type is Problem OR the case origin is Email. The standard setup would make that logic sentence be "If the case type is Problem AND the case origin is Email."

Enter the rule entry Save Save & New Car	ncel		
Step 1: Set the order in which this rule entry will be processed			= Required Information
Sort Order			
Step 2: Select the criteria for this rule entry			
Run this rule if the following criteria are met			
Run this rule if the following criteria are met Field	Operator	Value	
	Operator • equals	Value Value	S AND
Field			AND AND
Field Case: Case Reason	equals	Breakdown	
Field Case: Case Reason	equals None	Breakdown T	AND

Figure 3-31. Creating your rule criteria for the case escalation rule

10. In step 3 you can choose a business hour to set for this escalation.

Note To choose business hours to set, you to need to have created this in Salesforce. In the Setup menu, search for *business hours* for more information. By default, the business hours are set for 24 hours 7 days a week.

- 11. In step 4 you select how escalation times will be determined.
 - a. You can select when the case is created, which will evaluate the criteria only once when the case is created.
 - b. You can select when the case is created and disable it after the case is first modified. This option will check your case's criteria after the first time the case is modified (usually this is after a user has started to handle it).
 - c. You can select the last modification time of the case. This will check the criteria of the case every time a change is made to it. This will allow the escalation rule to be applied when the case is modified.
- 12. Click Save.



Figure 3-32. Selecting the business hours and when the case escalation rule should run

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13. Click the New button to start the creation of your actions.

Rule Entry Edit	Rule 1	Help for this Page 🥝
Edit this rule entries' details	or add a new action to take when this entries' details and criteria is met.	
Enter the rule entry	Edit Cancel	
Rule Name	Case Escalation Rule 1	
Order	1	
Rule Criteria	Case: Case Reason EQUALS Breakdown	
Business Hours Settings	Use business hours specified on case	
How escalation times are set	Based on when the case is created Edit Cancel	
Escalation Actions	13 New a	Escalation Actions Help 🕐

Figure 3-33. Creating your escalation rule action

- 14. For the Age Over field, you determine the number of hours that a case with matching criteria can be open before it escalates. You can change the drop-down to show single minutes or adjust it for 30-minute increments.
- 15. Under "Choose one or more of the following actions," you can do the following:
 - a. Choose to have the case reassigned to another user or a queue. In the field next to "Auto-reassign cases to," choose an email template that will get sent to that user or the users belonging to that queue.
 - b. Choose who will get notified that a case has escalated and select the template that should notify the user. Usually, this is an individual in management.
 - c. If you are not choosing to reassign the case, you can at this time notify the current owner of the case that it has escalated.
 - d. In the Additional Emails field, choose in addition to the previous setting if anyone else should receive a notice of the case escalating.

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16. When you have completed your action, click the Save button.

	Save	Cancel		
Escalation Action Edit				Required Information
Specify the time criteria for	this rule		14	
Age Over	4	30 minutes		
Choose one or more of the Auto-reassign cases to	following actions:			
User T	Tyson Jones	9	a Notification Template	Support: Escalated Case Re
Select the user to notify Notify This User	Rachelle Hoffman		b Notification Template	Support: Escalated Case No
Notify Case Owner	Ø			
You can enter up to five (5) en Additional Emails	Support@cloudcreaitons.			
			d	

Figure 3-34. Setting up the actions on your case escalation rule

Tip You can create one escalation rule with multiple actions, such as if you want a particular case to be escalated after two hours of meeting the rule criteria. Then if the case still isn't closed four hours after that and you want to escalate it again, you could set this up. All you would need to do is create another action.

Setting Up Email-to-Case

Email-to-case is a function that allows you to automatically have a case created based on an email being sent to a specific email address. For instance, if you have a support group that manages tech questions about your products, you can publicize an email and allow clients to submit requests that will automatically be routed to Salesforce and create a case for you. Figures 3-35 through 3-42 will walk you through this setup.

- 1. Navigate to the Setup menu by clicking the settings cog icon in the upper-right corner of the Salesforce window.
- 2. Using your search area, enter **Email**-. Click Email-to-Case under Service.
- 3. Click the Edit button.



Figure 3-35. Navigating to the email-to-case setup

- 4. Select the boxes Enable Email-to-Case and Enable HTML Email.
- 5. Click the Save button.

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SETUP Email-to-Case	
Email-to-Case S	
	utlook, select the options Enable Email-to-Case, as well as Enable On-Demand Service. 4o-Case, you can't disable it. You can, however, disable the On-Demand Service.
Enable Email-to-Case	×
Notify Case Owners on New Emails	
Enable HTML Email	
Send Emails from Cases	Required Information
Insert Thread ID in the Email Subject	
Insert Thread ID in the Email Body	2
Place User Signatures before Email Threads	
On-Demand Service	
On-Demand Email-to-Case er behind your network's firewall salesforce.com.	nables your organization to automatically create cases from email without having you download and install the Email-to-Case agent I. Simply configure your email system to forward case submission emails to the Email Services Address provided to you by
Enable On-Demand Service	
Failure Response Settings:	
Over Email Rate Limit Action	Bounce message
Unauthorized Sender Action	Di message *
	5 Save Cancel

Figure 3-36. Enabling the email-to-case function

6. Click the New button.

Email-to-Case Settings	S Edit
	tlook, select the options Enable Email-to-Case, as well as Enable On-Demand Service. o-Case, you can't disable it. You can, however, disable the On-Demand Service.
Enable Email-to-Case	1
Notify Case Owners on New Emails	
Enable HTML Email	
Send Emails from Cases	
Insert Thread ID in the Email Subject	✓
Insert Thread ID in the Email Body	1
Place User Signatures before Email Threads	
your network's firewall. Simply	ables your organization to automatically create cases from email without having you download and install the Email-to-Case agent behind configure your email system to forward case submission emails to the Email Services Address provided to you by salesforce.com.
Enable On-Demand Service	
Failure Response Settings:	
Over Email Rate Limit Action	Bounce message
Unauthorized Sender Action	Discard message
Routing Addresses	New Email2Case V
No email addresses defined	

Figure 3-37. Creating a new routing address for the email-to-case setup

- 7. Enter the email's routing name. Usually, this is the name of the email.
- 8. Enter the actual routing email address.
- 9. You can choose to save an email's header and set who you will accept them from. However, because these are usually images, it will take up 15KB of your organization's storage. Most users do not enable this option.
- 10. Under Task Settings, you can create a task along with the case being created when it comes in.
- 11. Under Case Setting, set the priority of the case and the case origin.
- 12. Click Save or click Save & New to set up more email routing addresses.

mail-to-Case F	Routing Information	Help for this Page
Email Address Edit		
Routing Information		= Required Informatio
8 Source Routing Name Email Address	Email2Case Cloud Creations Support Support@cloudcreations.com	
Email Settings		
Save Email Headers	1	
Task Settings		
Create Task from Email Task Status	In Progress	
Case Settings	-	
Case Owner Case Priority Case Origin	Queue V Case Queue	

Figure 3-38. Setting up your routing address for the email-to-case function

13. An email will be sent automatically to the routing address that you entered in step 8. If you don't receive an email within a couple hours, make sure to check your spam or other firewall settings your company may have or click the Resend link shown in Figure 3-39.

Routing	Addresses	New	Email2Case ¥		13	
Action	Source	Routing Name	Case Owner	Email Address	Verification	Email Services Address
Edit Del	Email2Case	Cloud Creations Support	Case Queue	rhoffman@cloudcreations.com	Pending [Resend]	

Figure 3-39. If you don't receive the verification email, you can use this Resend link to resend the email

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14. The email you receive should look like the example in Figure 3-40. You'll need to click the link within the email to verify that this is a working email address. After clicking the link, you'll be taken to another Salesforce screen; click the Continue button, as shown in Figure 3-41.

to me 🖃	e.com <support@salesforce.com></support@salesforce.com>	10:07 PM (4 minutes ago) ☆ 🚺	-
salesfo	rce		
Dear Rachelle Hoffn	nan,		
We have received the	e following request to change your Salesforce e	mail routing address:	
Routing name:	Cloud Creations Support		
New email routing a	address: support@cloudcreations.com		
00D6A0000000cGd HoNK7fQh5h1qMV yujMmrZdVclQeme 130CAP4LyE9zWq		k2AAAA0E5nZ8HPTWF0_bB2SzpeEr24VAK6dTi u8maw0F5WMGM4EJm-EpijgbULgaw81GI8x9qB dUsR0vSmzNIFb5mjgx4NLTKfJLxFiUmF IDAwMDA0Qzk2AAAA0B1gBV-	
This link will expire	72 hours after receipt of this message.		
If you cannot click t	he above link, please copy and paste it into a W	eb browser.	
	stions, please contact your administrator. Or, aft for online help and customer support information	er you have logged in, click the Help & Training lin n.	nk a
Thank you,			
salesforce.com			

Figure 3-40. Email verification sent

CHAPTER 3 SALESFORCE SERVICE CLOUD



Figure 3-41. Click Continue, and you'll be taken to the Salesforce login page

15. Lastly, you'll need to apply some email forwarding rules on your email inbox to forward emails to the e-mail service address that Salesforce provides.

Creating the email forwarding rule is what utilizes the on-demand email-to-case functions supported by Salesforce. By forwarding all your emails to the email service address provided by Salesforce, you can give your users a one-stop application with Salesforce. When an email is sent into Salesforce, the client receives a reply with a unique case thread found in the body and the subject line of the email. This case thread allows an email that comes back into the same email account and per your forwarding rules gets sent into Salesforce to be attached to the existing case. This allows your users to stay in Salesforce while they address support case inquiries. Figure 3-42 shows a case thread.

Rachelle Hoffman vśa tłsnośtwaws7r.41-/irjeaw.na35. bnc.salesforce.com to me 🕞	7:59 PM (0 minutes ago) 🎲 😽
Hi Avl, Please see my case thread below.	
We wanted to let you know that the management team is happy to approve your expedite shipping at no additional cost. You should receive your new part by 2pm to	EST Friday.
Best Winhest. Rachiele Hoffman Piroducts in General	
Powered by Salesforce http://www.salesforce.com/	
Powerad by Salesforce	

Figure 3-42. This case thread allows your client email to get attached to the appropriate case.

Note The email-to-case function has some limitations. First, you can only receive attachments up to 10MB. Second, this option only allows up to 5,000 email messages a day. For workarounds, see the Setup area to have Salesforce deal with bounced messages. Finally, if the case thread is not included in an email, a new case will be created.

Tip You would want to use the email-to-case option if your case inquiries are generally over 25MB. Also, the email-to-case setup will automatically identify contacts and replies to the case. The on-demand feature allows for a much more custom solution. It allows for custom field mapping, and its setup is fairly simple.

Setting Up Web-to-Case

The web-to-case function in Salesforce allows you to embed HTML code into your preexisting web site or web form. The majority of clients that have used this function embed the HTML code into a Contact Us form found on support-related web pages on their web sites. This function, like that of the email-to-case function, allows automatically generated cases to make it into Salesforce. Follow the steps shown in Figures 3-43 through 3-48.

CHAPTER 3 SALESFORCE SERVICE CLOUD

- 1. Navigate to the Setup menu by clicking the settings cog icon in the upper-right corner of the Salesforce window.
- 2. Using your search area, enter **Web-to-case**. Click Web-to-Case under Service.
- 3. The check box Enable Web-to-Case should be select, as shown in Figure 3-43.
- 4. Set the default Case Origin option to Web or any other option that describes where this case is coming from.
- 5. Attach a response template that you want your client to receive upon submitting their case.
- 6. Hide Record Information will hide the record information in the email that is sent.

Note If you want to create an email template for this, go to Setup, search for *Email Template*, and under the Email section you'll find Email Template.

- 7. Add an email signature if you choose to otherwise create it in the email template.
- 8. Click Save.



Figure 3-43. Creating the web-to-case function

Now that you have enabled the function, you can generate the HTML code to embed on your web site. Figures 3-44 through 3-45 show you how it's done.

- 1. On the left side in the Setup menu you should see Web-to-Case HTML Genera.... If not, you can search for *web-to-case HTML*. Click the phrase.
- 2. In the Available Fields area, select fields to be included on your web form.
- 3. Move the field from Available Fields to Selected.
- 4. In the URL field, enter the URL that you want your client to be returned to after submitting their web form.
- 5. The Enable Spam Filtering option will require the Captcha API key to be created (this requires developer work and will not be explained in this book). To set this up, you'll need to navigate to Salesforce Classic.
- 6. Click the Generate button.

CHAPTER 3 SALESFORCE SERVICE CLOUD

Q web-to-case	SETUP Web-to-Case HTML Generator
 Feature Settings Service Web-to-Case 	Capturing Case Information from Your Website Using pre-existing pages on your company's website, you can capture contact and case information from users and automatically create new cases in salesforce.com, enabling you to respond in real-time to customer requests.
Web-to-Case HTML Genera	Capture Cases Select the fields to include: Available Fields Company Type Status Case Reason Priority Engineering Req Number St.A Violation Product Potontia Liability Potone Product Potontia Potone Product
5	Visible in Self-Service Portal Enter the URL that the user will be returned to: URL http://cloudcreations.com Enable spam filtering (recommended) () Generate Cancel

Figure 3-44. Setting up the web-to-case HTML generator

- 7. Copy this HTML code and send it to your web site manager.
- 8. Click Finished when done.



Figure 3-45. The HTML that is generated

Summary

With Salesforce Service Cloud, you can tailor the experience to your organization's needs or utilize the great standard functionalities that come with your purchase. Whichever path you choose, you can assure yourself that setup is the least of your worries.

CHAPTER 4

Lightning Apps

The AppExchange marketplace comprises a suite of apps, Lightning components, and consulting resources. Salesforce customers can install add-on applications to their Salesforce organization. You can search across thousands of apps to find prebuilt solutions for business needs. The marketplace is also the place to search across thousands of registered Salesforce consultants (shown in Figure 4-1).



Figure 4-1. Blaze new trails with the AppExchange

Apps

Increase productivity by installing prebuilt packages, called *apps*, which provide custom solutions for every role and industry. Visit the AppExchange web site at http://appexchange.salesforce.com. Here you can sort and filter in numerous ways including by popularity and rating.

To pick the right app, we recommend identifying your business challenges, budget, and time frame.

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Discover the AppExchange Marketplace

You should take the time to explore the business app store in Salesforce, otherwise known as the AppExchange marketplace. There are more than 3,000 apps and components that can be used to extend the power of Salesforce. Follow these steps:

1. From the App Launcher, click Visit AppExchange, as shown in Figure 4-2. Or, from Setup, search for *AppExchange marketplace* in the Quick Find area.



Figure 4-2. Visit the AppExchange from the App Launcher

2. Click AppExchange Website, as shown in Figure 4-3.



Figure 4-3. Click AppExchange Website to navigate to the complete database of apps and components

This marketplace contains apps and components for end users to install and download into their Salesforce organization. In addition, you have access to thousands of reviews about these apps, components, and consultants. It's complete transparency at your fingertips.

On your home page, shown in Figure 4-4, apps can be searched and filtered by various categories. You'll find a wide array of apps! They range from point solutions to full-blown integration and automation. There are free apps, and there are paid apps. The good news is that Salesforce makes it easy to find what you are looking for.

salesforce appexchange	Apps Components Consultants		Apps • Search	Q, 🔒 Log In
New to AppExchange? Learn mor	Q		🔀 Send me A	AppExchange news and tips
	by, your AppExchang aster? Be more successful? She'll s			
Filters 👻 All Prices	All Editions All Ratings All L	anguages • Apply X Clear	Sort By F	Popularity
🗢 APPS	Featured Breakout Apps			View More >
Home Popular Apps New Apps Free Apps	Getfeedback Customer Surveys for Salesforce			LIGHTNING READY
Collections -	TRY FOR FREE apprechange	MOBILE GLOBÂL II INTELLIGENT TEXT MESSAGING BOOTH		
Sales Customer Service	**** (208)	**** (8)	*****(1)	

Figure 4-4. The AppExchange home page

Choose an App

Choosing the right app can seem overwhelming with the number of solutions available. So, it's important to have a strategy in this decision-making process.

- 1. Start by defining your business challenges. Identify your company goals and objectives. Once you've determined what they are, search and review a handful of solution options in the Salesforce marketplace.
- Once you've narrowed down a handful of prospective solutions, evaluate the solutions and vendors. Consider the ease of use, support options, total cost, reviews, the ease of administration, and solution match. Use this information to help make a decision.

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3. If available, request a demo or trial, or install the app into your sandbox for user testing and acceptance.

Price

One important factor is cost. There are apps in Salesforce that are free, but there are others that have a cost associated with them. While some apps display their total cost, others require you to contact them to find out the price. Some of these payment options can be monthly, annually, per user, or per organization.

Compatibility

Make sure to check the compatibility of the solution. You can find the compatibility information in the details section of the app under Requirements and Other System Requirements (shown in Figure 4-5).



Figure 4-5. Requirements and Other System Requirements sections in the app details

App Home Page

The home page of an app provides an overview, details, reviews, and provider information (shown in Figure 4-6).



Figure 4-6. Home page of an application

The page also contains this information:

• *Highlights*: The highlights bar located at the top of the application page, shown in Figure 4-7, displays key components of the app. This typically includes Lightning readiness, organization compatibility, and limitations.



Figure 4-7. Highlights bar

- *Cost*: The cost is located on the left side of the home page. If the app is free, the app will state Free. If there is a cost associated with the app, it will state Paid.
- *Overview*: Click the Overview tab shown in Figure 4-8 for a brief description of the app. Some apps contain links to their web site or include video demos here. It is recommended that you watch any videos for further insight into the app's capabilities. You can also find detailed pricing information, the release date, and screenshots in this area.

OVERVIEW DETAILS REVIEWS CO PROVIDER		♥ Save	🕞 Get It No
App by Symphonic Source			
The all-in-one tool to cleanse your database and mass imports by removing duplicate records, all from a simple and intuitive dashboard. Use the built in filters or create your own.	Address Validate & Standardize Lead Job: Lead Add 61,005 MATCHES, evenya titret, horizon (Jacobia)	ress Validation	
Cloudingo chases down and eliminates duplicate data! FREE TRIAL	La charante de la constante de	Contract Antennag Cont Contraction Contraction Bankforder R. R.	fore Renter Code
Vatch a Demo	Les filters Aussi Court Sourd Sourd Sources Sourd Sources Sour	Later Alter End Indentition Net Net Net Net Net	Frankarie Antonio Statu Antonio Statu Gru Chu Harbard Com
RELEASED		0	
I0/2/2012 PRICING ① Starting at \$1,096 USD per company per year	Alter	Las Rava Alam Dati Bata desemblique case Rava Rava Bata desemblique Co Co	Proc Resource Wate Address Trans Nat Vallande Ony Let allow Address Control Reference Control Referenc
Discounted for Nonprofits CATEGORIES	GET MORE VALUABL Give your data more purpose and mear mass delete, and address validation	ning with mass updat	ie.
Data Cleansing	Update, Delete, and Valid	ate Records	
			•

Figure 4-8. Overview tab for app

• *Details*: Click the Details tab shown in Figure 4-9 to gather more insightful details. This typically includes any technical specifics, software requirements, a supported feature list, data sheets, and security-related information.

OVERVIEW DETAILS REVIEWS (20) PROVIDER		V Save 🕞 Get It Nov		
he all-in-one tool to cleanse your database and mass imports by removing luplicate records, all from a simple and intuitive dashboard. Use the built-in filters r create your own.	CONTACT INFORMATION 972-241-1543 Company Website Email	SUPPORT () 972-243-1543 Email Knowledge Base URL Terms and Conditions		
loudingo chases down and eliminates duplicate data! FREE TRIAL				
 Cloud-based deduplication and data cleansing Auto-merge existing duplicates or dedupe import files from a dashboard Prebuilt filters or easily create your own from a drag-and drop UI loudingo solves the problem that so many organizations face - lead, contact and ccount duplicates. Simplify your marketing and reporting initiatives by cutting own all the clutter that tends to build up inside Salesforce. 	TECHNICAL DETAILS Name: Clovingadag ent Version: 1 62 / 1.62.0 Prix Release: 10/2/2012 Lareat Release: 51/2/2017 Languagez: English Industriks: Information not provided SUPPORTED FEATURES			
loudingo is a cloud-based, deduplication, and data quality app built specifically for	🖌 Lightning Ready	No Umits		
alesforce. Remove duplicate data in your existing database or from imports. Easily tegrate and manage customer data to ensure that you are always working with	PACKAGE CONTENTS			
e most accurate, up-to-date info.	Custom Objects: 8	Global: 0		
	Custom Applications: 1	App Builder: 0		
ind duplicate records in seconds & dedupe data	Custom Tabs: 2	Community Builder: 0		
Aerge & convert from a simple dashboard view				
Auto-Merge, mass merge, or manually merge dupes without losing any important ata Mass update & mass delete records Geocode, validate & standardize addresses Cleanse import files before data reaches Salesforce Prebuilt filters or easily create your own to make Cloudingo work for you Drag-and Drop UI	REQUREMENTS Salesforce Editions: Professional, Entr OTHER SYSTEM REQUREMENTS Admin access to the Salesforce org. In Accounts, Person Accounts, and Cust	s requimed. Cloudingo supports Leads, Contacts,		
Audit trails to track data changes Enterprise API (in/out) Works with standard & custom objects	It is important that customers evaluate	ts security reviews of publicly listed AppExchange appr te and understand the security and architectural		
Superior customer service and support		applications with access to data stored on Salesforce's stributed by the provider and has not been validated		
REE TRIAL!	1999 200 200 CONCERNED CON			
ought to you by the makers of DupeCatcher, one of the most popular apps on the opExchange.				

Figure 4-9. Details tab

To reach the app provider directly, contact information is displayed at the top-right corner of the page.

Tip For an app that requires extensive setup, consider the support options available for each app.

At the bottom of the Details tab are documents including data sheets, customization guides, case studies, and customer testimonials provided by the app company, as shown in Figure 4-10.

```
DATA SHEETS
CI Info Sheet
Data Maintenance Module
C Security Info
CO FAQs
Packages and Pricing
C Enterprise Tier
Marketo Integration
CUSTOMIZATION GUIDES
Go Beyond Deduping to Boost Your Data [infographic]
CASE STUDIES
CALC Increase Sales Efficiencies with Clean Data
Characteristic Customer Relations & Maintaining Credibility with Cloudingo
C How to Improve the Reliability of Salesforce Data
CUSTOMER TESTIMONIALS
C Success Stories
```

Figure 4-10. Important information stored about the app including data sheets, guides, case studies, and testimonials

Reviews

Every app is rated using a five-star scoring method and includes written customer reviews. These reviews are also split between positive reviews and critical reviews. Use this information to help determine the success of the app. Navigate to the reviews section on the Reviews tab to read customer feedback (shown in Figure 4-11).



Figure 4-11. The Reviews tab includes positive and critical reviews

To write a review, a user must be authenticated. To write a review, click Write a Review in the Review Highlights section, as shown in Figure 4-12.

VERVIEW DETAILS	REVIEWS 15 PROVIDER	🛷 Save 🕞 Get It Nov
REVIEW HIGHLIGHTS	RATING DISTRIBUTION	
1 - *****	5 Stars	Share your experiences with the community.
4.3 out of 5	4 Stars	
(15 reviews)	3 Stors	Write a Review

Figure 4-12. Click this button to write a review

Next, give your review a title. Provide comments in the Comments section shown in Figure 4-13. Scroll your mouse over the stars to select the appropriate rating. Click Post Review when finished. Note that it may take up to an hour for your review to post.

4.3 to the second secon	Share your experiences with the community. Write a Review
YOUR REVIEW Review Title	Please rate your overall experience with this app.
Comments	
2,000 cheracters left	Cancel Post Review It may take up to an hour for your review to post to the site.

Figure 4-13. Information to include in your app review

Note Come back to this page to write a positive or critical review of an app you have installed. This brings more value to the Salesforce community.

Provider

This tab holds more details about the app provider. Find out additional apps the provider has created that may be relevant to your business needs. Additional details include headquarter location, web site, employee count, and year founded, as shown in Figure 4-14.

Cloudingo - Effortlessly eliminate and manage duplicate data Clean your data and limit future duplicates. Automated and customizable.

OVERVIEW DETAILS REVIEWS (PROVIDER	🖤 Save 🕞 Get It Now
Subjection and	ABOUT THIS PROVIDER The are mission of Symphonic Source, the malers of Cloudingo and DupeCatcher, is guarantee data quality. Symphonic Source does so by providing Salesforce customers with insources to manage the exponential growth in data and keep that data clean.
Symphonic Source 972-241-1543 Company Webdte Email HEADQUARTERS	This mission is met by delivering a range of data management tools and services to help with data cleansing and integration, enabling users to realize the full potential of service- oriented architectures (SOA).
Dallas, TX, USA YEAR FOUNDED 2010	Symphonic Source builds tools that integrate with the world's leading cloud-based CRM service. Salesforce, to provide dedupilication and data cleansing, ensuring data quality to Salesforce users.
EMPLOYEES 16	Our newest offering, Cloudingo, profiles and dedupes the entire existing Salesforce org.
	Our initial product offering, DupeCatcher, Identifies and AND prevents duplicate records from being created in real time.

More apps from this provider

Paid - Details below



Figure 4-14. Provider tab

Install an App

Apps can be installed directly into your production or sandbox environment. Production environments are where your active users are using Salesforce with live data. The sandbox is your testing environment. These can be production or development environments used for testing applications. It is recommended that you install here first to see how it will interact with your existing setup.

An app can also be installed for a specific group of users or all users. To install an app, follow these steps:

- 1. Do some research and select the app to be installed.
- 2. Click the Get It Now button, as shown in Figure 4-15.

Mass Update And Mass Edi		/iew
Easy-to-use tool allows you to mass update an from list view.	id mass edit directly	L 🔏 S
Φαρ	🖌 Ughtning Ready	👖 Enterprise & Up 🛛 🐡 Native App
Mass Update And Mass Edit From List View Mass Update And Mass Edit From List View Lightning Ready ***** (196)		
Free - Details below		
OVERVIEW DETAILS REVIEWS CO PROVIDER		🖤 Save 🕞 Get It Now
App by Salesforce Labs		
Mass update and mass edit selected records from any filter view or related list. You get two easy to use tools designed for both admins and standard users. Please note for lightning experience UI, it works better with Winter 17 release.		
Call Take a Test Drive	ne Brather Carefu	n lank Annun Golan (annun Fernan Golan Ban Ban jan San
	Annotation Annotation 7 Anno 100	e fre jage wit we can the out in a closed whole closery the fame builder free
RELEASED	TOTO Das Desemationer fain Toto Das menten fain Toto Das menten fain	Anne Rep One San Mark Rep [Proster] Conserve] [Proster 12(2021) Section] Conserve] [Proster 12(2021)
6/30/2009	TOWNO Communications Communications of the Communication of the Communic	Prime Description Description
PDICING B		ALARA DALARS DALARS DALARS DALARS
PRICING	Cherry Constitutioners and Internet An	anna Courter D Lennes (20202)
FIGE Disc	10+10 statilizations une	Jan Ann
CATEGORIES		
Admin & Developer Tools		

Figure 4-15. Get It Now button on the home page

- 3. Log in using your Salesforce credentials.
- 4. Select the appropriate installation method, as shown in Figure 4-16.
 - Click "Install in production" to install into a live, production environment.
 - Click Install in Sandbox to install into the sandbox test environment.



Figure 4-16. Choosing to install into production or the sandbox

- 5. Review the package components, version, expiration, and subscription cost for the app that will be installed. Review the terms and conditions.
- 6. Select "I have read and agreed to the terms and conditions," as shown in Figure 4-17. Click Confirm and Install.

Before installing, please review the <u>customization guide</u> to familiarize yourself with the installation and				
configuration steps for this application.				
WHAT YOU ARE INSTALLING	WHERE YOU ARE INSTALLING			
PACKAGE	ORGANIZATION			
Mass Update And Mass Edit From List View	company name			
VERSION	EDITION			
Mass Update And Edit Lightning Ready (1.5 / 1.5.0)	Developer USER NAME			
SUBSCRIPTION				
Free	salesforcelightningbook@cloudcreations.com			
DURATION				
Does Not Expire				
NUMBER OF SUBSCRIBERS				
Site-wide				
🗖 1 have read and agree	e to the terms and conditions .			
Cancel Install Back to previous step	Confirm and Install			
Salesforce.com (nc. is not the provider of this application but has conducted a limited security review. Please click				

Figure 4-17. Last step before installing

7. Identify the users who should have access to this app. Select the appropriate option from the following list: Install to Admins Only, All Users, or Specific Profiles.

here for detailed information on what is and is not included in this review.

Note You can open access to this app to other users after the install.

8. Click Install, as shown in Figure 4-18.



Figure 4-18. Selecting which users to install to

9. Click Done and you will be directed to the Installed Packages section once the app has completed installation (see Figure 4-19).



Figure 4-19. Details on installed and uninstalled packages

Installed Packages

Installed apps create a package of components and dependencies. This includes custom objects, Visualforce pages, and Apex classes and code. The installed app can come in the form of a managed or unmanaged package.

- A *managed package* contains restrictions to the components installed.
- An *unmanaged package* has more flexibility and allows development on top of any components installed.

To uninstall an app, navigate to the Installed Packages area in Setup and click Uninstall.

To find details on any installed apps, including all components and dependencies, click the name of the package, as shown in Figure 4-20. The details will appear, as shown in Figure 4-21.

Installed Pa	ackages								
Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects
Uninstall	Mass Update And Edit Lightning Ready	SFDC	1.5		6/22/2017 12:01 PM	1	1	1	1
-	Description This package is the lightning ready version of Mass Update and Mass Ed	e.							

Figure 4-20. Package name

Package Details Mass Update And Edit Lightr « Back to List: Accounts Installed Package Detail	Uninstall [Wew Components] [Wew Dependencies]		
Package Name	Mass Update And Edit Lightning Ready	Version Number	1.5
Language	English	Package Type	Unmanaged
Version Name	1.5	Modified By	Felicia Duarte, 6/22/2017 12:01 PM
Publisher	SFDC		
Description	This package is the lightning ready version of Mass Update and Mass Edit.		
installed By	Felicia Duarte, 6/22/2017 12:01 PM		
Count Towards Limits	×	Tabs	1
Apps	1	Objects	1

Figure 4-21. Package details

Click View Components for the complete breakdown, by type, of everything installed, as shown in Figure 4-22.

tion Name	Panent Object	Туре
MassEditContact		Visualforce Page
MassEditCase		Visualforce Page
MassEditProduct		Visualforce Page
MassEditOpp		Visualforce Page
MassEditLead		Visualforce Page
LEXSelection		Visualforce Component
MassEditContract		Visualforce Page
MassEditCampaign		Visualforce Page
MassEditAsset		Visualforce Page
MassEditAccount		Visualforce Page
About Mass Update And Mass Edit VF		Visualforce Page
Mass Update And Mass Edit		Арр
All	abc	List View
MassUpdateSimpleControllerTest		Apex Class
MassUpdater		Apex Class
MassEditExtension Test		Apex Class
MassUpdateSimpleController		Ape× Class
MassEditExtension		Apex Class
abc		Custom Object

Figure 4-22. Viewing your package components

- *Visualforce page*: A Visualforce page is a custom-built page made up of Apex classes and code, used to create a custom look and feel.
- *Apex class*: An Apex class is part of a unique Salesforce programming language that gives developers and app builders the capability to create business logic.
- *Custom object*: This is used to store or build custom information. Custom objects can be used to link information to standard objects.

Lightning Component

Lightning components are reusable containers of prebuilt tools and elements. These components can be added to your pages to ramp up the productiveness of your end users. As mentioned earlier in the book, components can easily be dragged and dropped into your desired page. Salesforce makes this easy to do without a developer and without code. Discover these tools by searching through the marketplace, as shown in Figure 4-23.



Figure 4-23. Lightning Components search page

To download a component, follow the same steps used to download an app.

Find a Consultant

Consultants are registered and often certified Salesforce partners. They help make up the Salesforce ecosystem by providing custom Salesforce solutions and implementations. Consultants typically provide Salesforce training, implementation solutions, quick-start packages, data migration, and more.

Your Salesforce account executive will often recommend a Salesforce consulting partner. Typically a discovery or scoping call with a consultant follows, and a quote with timeframe, deliverables, and cost is provided.

Similar to app browsing, browse through a list of consultants and sort by the type of service, specialization, tier, territory, and more.

1. Select Consultants from the top of the page, as shown in Figure 4-24.



Figure 4-24. Consultants tab

2. Select a consulting page (shown in Figure 4-25) to view more details (shown in Figure 4-26).



Figure 4-25. Cloud Creations, consulting company



Figure 4-26. Cloud Creations consultant detail page

3. Find more details about this prospective consultant, including the number of projects completed, satisfactory ratings, geographic focus, and more on this page (shown in Figure 4-27). You can also find the consultant's contact information here to contact them for services.

We provide flat-rate and fixed timeline Salesforce implementations. Do Business Faster with expert Cloud Creations Salesforce, Pardot, and SteelBrick consulting and development.

- Salesforce and Communities Development
- · Pardot and Marketing Cloud Configuration
- SteelBrick and CPQ Configuration

Cloud Creations Inc. provides fixed-bid, turn-key Salesforce implementation services, which include data import, integration, documentation, reports, and training. Our clients range for small-and-medium sized businesses to large enterprises. Additionally we provide Pardot and SteelBrick setup services.



Figure 4-27. Details section on consultant

4. Contact the consultant and request a quote.

Tip Consultants often employ a mix of project managers, business analysts, developers, and specialists. Hourly rates vary widely and typically include a scoping call to identify the right solution for your business. The more detail you can give your potential consultant, the more accurate the cost estimate will be.

Summary

The AppExchange marketplace consists of the Salesforce ecosystem of app partners and consultants. It is a growing market and is expected to make big changes in the near future. Visit the AppExchange marketplace to maximize your Salesforce setup.

CONTACT INFORMATION (800) 951-7651 Company Website Erreil

SPECIFIC DETAILS Languages: English Industries: Pinancial Services, Professional Services Geographic Focus: North America
CHAPTER 5

Lightning Reports and Dashboards

Salesforce reports and dashboards give you necessary insight into the data that you have collected in Salesforce. Every custom field and the majority of standard fields in any Salesforce object can be used in a Salesforce report. Salesforce dashboards help you to display this data in 11 different visual charts and tables. One report can be used in several dashboard components; however, a dashboard component can use only one report. A dashboard can display up to 20 dashboard components. Figure 5-1 shows the report that comes standard on your user's home page in Lightning.



Figure 5-1. The home screen of opportunity performance by quarter in Salesforce

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Understanding Reports and Report Features

Reports allow you to see your data based on specific criteria that you define. Once you have defined your criteria, you can group your data, create a chart for easy viewing, filter your data further, and store the report for later use in report folders. In these next couple of sections, we'll cover some of the functions available in the report builder that are necessary to understand, and then we'll jump into building your report.

Report Types

Report types allow you to define what objects and fields are available to you when creating a report. You can create report types based on a relationship with an object to a related object. A good example of this type of relationship is accounts and their related opportunities. Your opportunities would be the primary object, and the account would be the related. Don't worry, you don't need to create report types to start using Salesforce reports because out of the box Salesforce has set up the standard objects for you. However, if you find a field missing on a report or you can't find a custom object related to another, you'll want to continue reading. Or if the standard-use report types don't work for your business, you can customize your own!

Creating Report Types

The process to create report types is as follows:

1. Click the settings cog icon in the right corner of the browser, as shown in Figure 5-2.



Figure 5-2. Navigating to the Setup menu

2. In the Quick Find box, search for *report types* (do not press Enter) and select the yellow highlighted phrase Report Types, as shown in Figure 5-3.



Figure 5-3. Accessing the report types

Tip Salesforce offers help on most of its administrative processes. If you are seeing "What is a Custom Report Type?" instead, feel free to read this content too and then click Continue. You can also click "Don't show me this page again" to disable this window in the future, as shown in Figure 5-4.

Custom Report Types	
What is a Custom Report Type?	
Custom report types allow you to build a framework in the report witzerd, from which users can cre- • Choose which objects to display to users creating and customizing reports • Define the reliationships between objects signayed to users creating and customizing re- • Select which object this can be used as columns in report.	ate and customize reports. You build custom report types off of the relationships (master-detail and lookup) between objects so that you can: ports
Note that the visibility of custom report types in the report wizard is controlled by users' access to the	e objects in the report type.
	Don't show me this page again
	Continue

Figure 5-4. Custom Report Types help page

3. Click New Custom Report Type, as shown in Figure 5-5.

171

All Custom	Report Types				Help for this Page
		create reports from the press	lafinad objects object relation	ationships, and fields that you specify.	
	these to a carriente donte to	create reports notifiers prov			
	Report Types 🗸 Edit <u>Create N</u>				
			3		0 R S T U V W X Y Z Other
			3		Q R S T U V W X Y Z Other
		an Marr	3		0 R S T U V W X Y Z Other

Figure 5-5. Creating a new custom report type

4. Select the primary object from the drop-down field that your report should have, as shown in Figure 5-6.

Report Types		
New Custom R	eport Type	Help for this Page 🥹
Step 1. Define the Cust	om Report Type	Step 1 of 2
		Next Cancel
Report Type Focus		= Required Information
	rds (rows) will be the focus of reports generated by this report type. Contacts with Opportunities with Partners," select "Contacts" as the primary object. Accounts Accounts Accounts, Opportunities and contact roles Accounts_Opportunities_an 1 Note: Description will be visible to users who create reports. Accounts, Opportunities and contact roles Copportunities T	
Deployment		
A report type with deploy and their delegates. Deployment Status	ed status is available for use in the report wizard. While in development, report types are v In Development Deployed	visible only to authorized administrators

Figure 5-6. Creating a customer report type

- 5. Label your report type. This label will be displayed to your users when they are selecting the report type for the report builder. After you have finished your name, hit your Tab key, and Salesforce will automatically create the report type name.
- 6. Type a description for the report type. This will be visible to users who use this report type.
- 7. Select the category where this report type should be stored. For example, if the report type created was an opportunity and contact report, you should put it in the Opportunity folder. If the report type was a combination of multiple objects, you can choose to store it in one of those object's folders.
- 8. Select what status this report type should be in. Selecting the In Development radio button will hide this report type for all users except administrators or those with delegated permissions. Selecting the Deployed status will make this report type visible to all users who have access to the report builder. You can always come back and select the Deployed option when you have finished and tested your report type.
- 9. Click Next.
- 10. Select "Click to relate another object," as shown in Figure 5-7.

Report Types	
New Custom Report Type Accounts, Opportunities and contact roles1	Help for this Page 🧐
Step 2. Define Report Records Set	Step 2 of 2
	Previous Save Cancel
A Accounts Primary Object (Click to relate another object) (Click to relate another object) (Click to relate another object)	
	Previous Save Cancel

Figure 5-7. Relating another object for your custom report type

11. Click the Select Object drop-down to choose your related object for this report type, as shown in Figure 5-8.



Figure 5-8. Relating another object to your customer report type

Note If you are not seeing the object you want to relate to this object, it means that there is no connection between these objects. To create a connection, you'll need to create a lookup field on the related object to the primary object. Before data will populate this report, that field on your records will have to be filled with a primary object record. Building custom objects and fields is simpler than you think. We don't cover how to do that in this book, but Salesforce offers great "trailheads" on this topic. Go to https://trailhead.salesforce.com to find your trailhead and further your education.

12. In Figure 5-9, you'll have two choices shown under A to B Relationships. The option "each 'A' record must have at least one related 'B' record" will only show B records where at least one A is related to it. For example, all contacts that are related to accounts will show, but if you have a contact that has no relation to an account, it won't show. The option "A" record may or may not have related to 'B' records" will show all B records whether or not they are related to your A record.

Report Types	
New Costom Report Type Accounts with Opportunities and Contacts	way to to a fuga 🥹
Step 2. Define Report Records Set	Step 2 of 2
	Previous Jave Canoni
The report type will generate reports aloud Accounts. You may define which multed records from the depct Accounts Privacy Object Privacy Ob	B

Figure 5-9. Choose the type of relationship the two objects have for this report type.

- 13. Click "Click to relate another object" to select your next object.
- 14. Click the Select Object drop-down to choose your next related object for this report type.
- 15. Choose between the two radio buttons under A to B Relationships.
- 16. Repeat steps 13 through 15 to relate more objects for this report if necessary.
- 17. Click Save, as shown in Figure 5-10.



Figure 5-10. Relating another object to your custom report type

Note If you add new fields to your objects after creating a custom report type, you'll have to add the new fields to the report type. You can do this by going to Setup, clicking your report type name, and clicking Edit Layout under "Fields Available for reports." This is shown in Figure 5-11.

	the section header and drag it to the desired location	ndividually or Shift+click to select a group of fields on.			
Id Layout Properties	Sav	e Cancel Preview Layout			
		Total Fields RProperties] [Create New Section]	in Layout 148	Us	t in Page Layout ed in Page Layout
Accounts Account ID	🗸 Account Name	Account Number	Account Owner	1 0	lected by Default
Account Site	Account Source	Active	Annual Revenue	Q A	ided via Lookup
Billing Address	Billing City	Billing Country	Billing Geoca .	View Opportunities Fields	•
Billing Latt	Billing Longi	Billing State	Billing Street	Add Selds related via to	Happe
Billing Zg-P	Clean Status	Created By	Created Date		portunation (and a page 12) . Next Pa
Customer Pric	D58 Company	Data com Key	Description	Account Name	Annual Classif Date
D-U-N-S Number	Employees	Fas	Industry		Cenated By
Last Activity	Last Modified	Last Modified	NAICS Code		Current Gener
NAICS Descrip	Number of Loc	Ownership	Parent Account	Coloraybod.	Description Parecast Cale
Phone	Rating	Shipping Addr	Shipping City	Pass Line Daw	Last Activity
Shipping Coun	Shipping Geoc	Shipping Lali	Shipping Long	Last Monthed	Last Modified.
Shipping Stat	Shipping Street	Shipping Zipi	SIC Code		Next Pr
SIC Description	SLA	SLA Expiratio	SLA Serial No.		

Figure 5-11. Adding new custom fields to your existing customer report types

Report Formats

Salesforce in Lightning Experience offers three report formats. Each format allows you to customize your report differently. Whether you are using Tabular format to generate a call list, Summary format to show data grouped horizontally, or Matrix format to summarize your data by both rows and columns, Salesforce has the proper format for you. You also have an additional report format, Joined reports, that you can use; however, you need to switch to Salesforce Classic to build and view these types of reports. Each report format has its strengths; let's look into these a little further. Figure 5-12 shows where you can make this adjustment between report formats.

Report Type: Contacts & Accor Unsaved Report							Guided Tour Video Tutorial Help for
Save As Close	👌 Report Prope	erties					
ields All a #		Add v My contacts		•			
irag and drop to add fields to the repor	Date Field	Created Date	v Ran	ge Custom ¥ From \$/31/2	017 🗐 To	8	
Bucket Fields Add Bucket Field Contact: General G Contact Owner Contact Owner Contact Owner Alias	 To add filte 	rs, elick Add.					
Gontact Owner Alias Greated By	Preview	Tabular Form	t * Show	Remove All Columns			
Greated Alias G Last Modified By	Salutation	✓ □ таb		Title	Mobile	Email	Account Name
(Last Modified Alias	Ms.	Sun	mary	SVP, Procurement	(512) 757-9340	rose@edge.com	Edge Communications
a Salutation	Mr.	E Mat	riv.	CFO	(512) 757-4581	sean@edge.com	Edge Communications
g First Name	Mr.	and the	104	VP, Facilities		jrogers@burlington.com	Burlington Textiles Corp of America
a Last Name	Mr,	Help me	choose	SVP, Administration and Finance	(312) 596-1230	barr_tim@grandhotels.com	Grand Hotels & Resorts Ltd
a Title	Mr.	John	Bond	VP. Facilities	(312) 596-1563	bond_john@grandhotels.com	Grand Hotels & Resorts Ltd
Gepartment Birthdate	Ms.	Bertha	Boxer	Director of Vendor Relations		bertha@fcof.net	Farmers Coop. of Florida
a Lead Source	Ms	Patricia	Feager	CEO	1	patricia_feager@is.com	International Shipping Co.
# Assistant	Ms.	Stella	Pavlova	SVP, Production	(212) 842-5501	spavlova@uog.com	United Oil & Gas Corp.
@ Asst. Phone	Ms.	Lauren	Boyle	SVP, Technology	(212) 842-5611	lboyle@uog.com	United Oil & Gas Corp.
@ Owner Role Display	Ms.	Jane	Grey	Dean of Administration	(520) 773-4539	jane_gray@uca.edu	University of Arizona
a Owner Role Name		Arthur	Song	CEO	(212) 842-4535	asong@uog.com	United Oil & Gas Corp.

Figure 5-12. Switching report formats

Tabular Report Formats

The Tabular format reports are easily comparable to a flat file like a spreadsheet. This report format contains columns as the different data points and rows with your actual records. These reports are best used for creating a list of records like a call list or to list records with one grand total. This report format can't be grouped, and you can't display the information in a chart or use it in a dashboard component unless you use a row limit filter (see Figure 5-33). Most clients will use a Tabular report format to see a grand total of their sales with specific criteria set. For instance, if you want to run a quick report on all the sales your team generated for a quarter, you could use a tabular report. Figure 5-13 shows what a call list tabular report would look like.

Cloud	Creations Contact List					
Total Records 20						
ACCOUNT OWNER	ACCOUNT NAME	SALUTATION	FIRST NAME	LAST NAME	MOBILE	EMAIL
Rachelle Hoffman	Burlington Textiles Corp of America	Mr.	Jack	Rogers		jrogers@burlington.com
Rachelle Hoffman	Dickenson plc	Mr	Andy	Young	(785) 265-5350	a_young@dickenson.com
Rachelle Hoffman	Edge Communications	Ms.	Rose	Gonzalez	(512) 757-9340	rose@edge.com
Rachelle Hoffman	Edge Communications	Mr.	Sean	Forbes	(512) 757-4561	sean@edge.com
Rachelle Hoffman	Express Logistics and Transport	Ms.	Babara	Levy	(503) 421-5451	b.levy@expressl&t.net
Rachelle Hoffman	Express Logistics and Transport	Mr.	Josh	Davis	(503) 421-4387	j.davis@expressl&t.net
Rachelle Hoffman	GenePoint	Ms.	Edna	Frank	(650) 867-7686	efrank@genepoint.com
Rachelle Hoffman	Grand Hotels & Resorts Ltd	Mr.	Tim	Barr	(312) 596-1230	barr_tim@grandhotels.com
Rachelle Hoffman	Grand Hotels & Resorts Ltd	Mr.	John	Bond	(312) 596-1563	bond_john@grandhotels.com

Figure 5-13. Tabular report example

Summary Report Format

The Summary report format is the most widely used report format in Salesforce. This type of report format allows you to group and summarize your data for up to three levels. Within these groups, you can summarize on the column and obtain the subtotal for that particular grouping and at the end of your report the grand total. You can use formulas in this report to further define your report. You can use this type of report format to show how your sales users are stacked against each other by grouping on opportunity owner. You can also use this report to determine who in your company holds the highest record count by also grouping on users of that record. Or you can build a report to group the different type of contacts you have by title. This format can also be used and represented on a dashboard and in charts. When you leave your report ungrouped, it will display in a Tabular format. Figure 5-14 shows a report that clients would use to see how much new business is coming in versus how much business is coming from current clients. You can also see that it is grouped by the user to show how each user is stacking up against the other.

Cloud Crea	tions Opps by Typ	e and User		
Total Records Total Am 10 \$2,375	nount 5,000.00			
TYPE 🕆	OPPORTUNITY OWNER ↑	ACCOUNT NAME	OPPORTUNITY NAME	AMOUNT Sum
Existing Customer - Upgrade (5 records)	Rachelle Hoffman	GenePoint	GenePoint SLA	\$30,000.00
	(5 records)	Grand Hotels & Resorts Ltd	Grand Hotels Generator Installations	\$350,000.00
		United Oil & Gas Corp.	United Oil Standby Generators	\$120,000.00
		United Oil & Gas Corp.	United Oil SLA	\$120,000.00
		United Oil & Gas Corp.	United Oil Installations	\$235,000.00
	Subtotal			\$855,000.00
Subtotal				\$855,000.00
New Customer	Rachelle Hoffman	GenePoint	GenePoint Standby Generator	\$85,000.00
(5 records)	(5 records)	Edge Communications	Edge Emergency Generator	\$75,000.00
		Burlington Textiles Corp of America	Burlington Textiles Weaving Plant Generator	\$235,000.00
		Grand Hotels & Resorts Ltd	Grand Hotels Emergency Generators	\$210,000.00
		United Oil & Gas Corp.	United Oil Refinery Generators	\$915,000.00
	Subtotal			\$1,520,000.00
Subtotal				\$1,520,000.00
GRAND TOTAL (10 RECORDS)				\$2,375,000.00

Figure 5-14. Summary report example

Matrix Report Format

The Matrix report format allows you to group your data by both columns and rows. This allows for a cross examination of your data. Just like the Summary report format, on the groups you create in the Matrix format you can see subtotals, record counts, and grand totals as well as see them by row or column, as shown in Figure 5-15. Use this type of report to show how well products perform over date ranges by grouping your columns by date and your rows by opportunity products. Or use this report to determine how well your users are performing over time. Use this report to compare your incoming case origin against your case reasons. This type of report can also be used in dashboard components as well as charts. Additionally, you can use formulas to further calculate your data. If your groupings or criteria display no results, this format report will be downgraded to Summary format.

Total Records Total Total Price 31 \$5,760,000.0	00										
	CLOSE DATE	JANUAR	2017	FEBRUAR	RY 2017	MARCH 2	017	APRIL 20	17	Total	
TYPE	STAGE	COUNT	TOTAL PRICE Sum	COUNT	TOTAL PRICE Sum	COUNT	TOTAL PRICE Sum	COUNT	TOTAL PRICE Sum	COUNT	TOTAL PRICE Sum
	Prospecting	0	\$0.00	1	\$100,000.00	0	\$0.00	0	\$0.00	1	\$100,000.00
	Id. Decision Makers	0	\$0.00	0	\$0.00	0	\$0.00	1	\$60,000.00	1	\$60,000.00
	Subtotal	0	\$0.00	1	\$100,000.00	0	\$0.00	1	\$60,000.00	2	\$160,000.00
Existing Customer - Upgrade	Needs Analysis	0	\$0.00	0	\$0.00	1	\$675,000.00	0	\$0.00	1	\$675,000.0
	Value Proposition	1	\$80,000.00	0	\$0.00	0	\$0.00	1	\$250,000.00	2	\$330,000.0
	Id. Decision Makers	1	\$15,000.00	0	\$0.00	0	\$0.00	0	\$0.00	1	\$15,000.0
	Perception Analysis	1	\$120,000.00	0	\$0.00	0	\$0.00	0	\$0.00	1	\$120,000.0
	Proposal/Price Quote	1	\$100,000.00	0	\$0.00	0	\$0.00	1	\$270,000.00	2	\$370,000.0
	Negotiation/Review	0	\$0.00	2	\$395,000.00	0	\$0.00	0	\$0.00	2	\$395,000.0
	Closed Won	3	\$240,000.00	4	\$995,000.00	1	\$350,000.00	3	\$270,000.00	11	\$1,855,000.0
	Subtotal	7	\$555,000.00	6	\$1,390,000.00	2	\$1,025,000.00	5	\$790,000.00	20	\$3,760,000.0
Existing Customer - Replacement	Id. Decision Makers	0	\$0.00	0	\$0.00	0	\$0.00	1	\$35,000.00	1	\$35,000.0
	Subtotal	0	\$0.00	0	\$0.00	0	\$0.00	1	\$35,000.00	1	\$35,000.0
New Customer	Qualification	0	\$0.00	1	\$15,000.00	0	\$0.00	0	\$0.00	1	\$15,000.0
	Closed Won	2	\$270,000.00	2	\$320,000.00	2	\$1,125,000.00	1	\$75,000.00	7	\$1,790,000.0
	Subtotal	2	\$270,000.00	3	\$335,000.00	2	\$1,125,000.00	1	\$75,000.00	8	\$1,805,000.0
	Total	9	\$825,000.00	10	\$1,825,000.00	4	\$2,150,000.00	8	\$960.000.00	31	\$5,760,000.0

Figure 5-15. Matrix report example

Report Filters

While in the report builder it will be necessary to understand the use of report filters that Salesforce has to offer. You can utilize up to five filter features to help customize your reports further. Filters allow you to get a closer look at your data and make it more specific for your reporting needs.

Standard Filters

Standard filters in the report builder of Salesforce will differ for some objects. Since the data you are collecting across accounts and contacts is different from that of opportunities or cases, you'll see these standard report filters change based on the report type. Let's take a look at each report type and their standard filters.

Accounts, Contacts, and Leads

Accounts, contacts, and leads all share similar standard report filters. Like most things to learn in Salesforce, if you understand the components of one object, those sometimes will translate into other objects. For the accounts, contacts, and leads, you'll find they share similar attributes.

• *All accounts*: This report filter allows you to choose if you see all accounts regardless of the owner, only contacts you own, only the accounts you own, or your team's accounts, as shown in Figure 5-16. If you have security set in place with role hierarchies or sharing rules, your users will only be able to see the accounts, contacts, and leads they are set up to see.



Figure 5-16. Account filter for ownership of records

• *All leads*: This report filter for leads is similar; you have the option to see the leads you own, your team's leads, and user-owned leads (compared to queue owned), queue-owned leads, and all leads, as shown in Figure 5-17.

Cloud Creations Leads by	Source				
Save Save As Close & Report Proper	rties 🕞 Run Report				
Q Quick Find 2 Show	Add All leads Wy leads	Time	From	То	
Drag and drop to add fields to the report of the fields	My team's leads User owned leads Queue owned leads All leads				

Figure 5-17. Lead filter for the ownership of records

• For the accounts, contacts, and leads, you can choose from any date field within that report type to filter from as well as use Salesforce smart dates. Smart dates allow you to choose dates that will update to the relative time every time you run your report. For instance, you can choose from the drop-down This Week or Current Calendar Year or use your own custom date range in the From and To fields, as shown in Figure 5-18.

Save Save As Close	Report Prop	erties 🕞 Run	Report				
Fields All a # 🗔	Filters	Add 🔻		3			
Q. Quick Find	Show	All accounts					
Drag and drop to add fields to the report	Date Field	Created Date	▼ Ran	ge All Time v From		То	
Constant Sector	To add filt	ers, click Add.		All Time Custom Fiscal Year Current FY	Â		
Contact: General Contact Owner Contact Owner Alias Contact Owner Alias Coreated By	Preview Salutation	Summary Forr First Name	nat 💌 Show Last Nam	n 2 FY Ago		Mailing	City Maili
- 4 Created Alias	Title:	- (2 Records)		Next FY Current and Previous FY			
- a Last Modified By	Dro	p a field here to c	reate a groupi		a 🗌 📰		
- 4 Last Modified Alias	Ms.	Siddartha	Nedaerk	T Current and Next FY		San Fran	ncisco CA
- a Salutation	Mr.	Jake	Llorrac	T Fiscal Quarter		San Fran	ncisco CA
- a First Name	Title:	CEO (1 Record)		Current FO			
- a Last Name - a Title	Mr.	Arthur	Song	Current and Next FQ Current and Previous FQ			
- a Department	4 Titles	CFO (2 Records)		Next FO	-		

Figure 5-18. Smart date filters

Note If these smart dates don't work for your report, see "Field Filters" for more ideas.

Opportunities' Standard Filter Fields

Opportunities' standard filter fields are unique to their report type, so let's look at them.

• Similar to accounts, contacts, and leads, opportunities have a standard report filter that allows you to choose all opportunities regardless of who owns them, your team's opportunities, and your opportunities, as shown in Figure 5-19. If you have security set in place with role hierarchies or sharing rules, your users will only be able to see the opportunities they are set up to see.

Report Type: Opportunities with Pro Cloud Creations Op	
Save Save As Close	eport Properties Run Report
Fields All a #	Filters Add Filte
Beild and oldy to add heads to the reference of the	My team's opportunities To add filte All opportunities
B Account: Address	

Figure 5-19. Opportunity ownership filter

• The Opportunity Status filter allows you to see any opportunity whether it is closed, open or won, and all opportunities with any status, as shown in Figure 5-20.



Figure 5-20. Opportunity status filter

• Opportunity Probability allows you to filter based on the Probability field (which is associated with this stage). You can choose options such as greater than 90 percent to get a better picture of what is in your pipeline that will most likely close, as shown in Figure 5-21.

Save As Close	Report Properties	🕞 Run Re	port						3		
Fields All a #	Filters Add	•							-		
Q. Quick Find	Show All oppor	tunities	v Op	portunity Status Close	d Won 🔻 Proba	bility		-	\sim		
Drag and drop to add fields to the report.	Date Field Close Da	ate	Range All Time	• From	6	To	All > 90%	-]		
Add Formula Bucket Fields Add Bucket Field Opportunity Information Created By	To add filters, click	• Show • Remove	All Columns		_	> 70% > 60% > 50% > 40% > 30%					
a Created Alias				Close Date	January 2017	Febr	> 20%		2017	April 2017	Grand Tota
- a Last Modified By - a Last Modified Alias				Drop a field here to create a column grou	ping.		> 10% < 90%				
a Opportunity Name	Туре		Drop a field here to	Drop summarizable fi	elds into the matrix	τ.	< 80%				
a Type a Lead Source	Existing Customer	Upgrade	create a row grouping.	Sum of Total Price Record Count	\$240,000.00 3	\$95	< 70% < 60%	i i	00.00	\$270,000.00 3	\$1,855,000.0 1
A Primary Partner Amount				Total Price Record Count	\$60,000.00 1		< 50% < 40%				
# Opportunity Quantity				Total Price	\$90,000.00		< 30%	-			

Figure 5-21. Opportunity Probability filter

• The opportunity Date Field filter works just like the one for accounts, contacts, and leads. You can choose from any date field within that report type to filter from as well as use Salesforce smart dates. Smart dates allow you to choose dates that will update to the relative time every time you run your report. For instance, you can choose from the drop-down This Week or Current Calendar Year or use your own custom date range in the From and To fields, as shown in Figure 5-22.

Save As Close	Report Properties Run Re	sport						
Fields All a # Q. Quick Find	Filters Add Show All opportunities		Opportunity Status Closed	Won V Prob	ability All	T		
Drag and drop to add fields to the report.	Date Field Close Date	Range	All Time v From	61	То	6		
Formulas Jr Add Formula Bucket Fields Opportunity Information a Created By c Created Alas			Al Time Custom Fiscal Year Current FY Previous FY Previous 2 FY 2 FY Ago 2 FY 2 FY				April 2017	
- a Last Modified By - a Last Modified Alias			Next FY Current and Previous FY	uary 2017	Pedruary 2017	March 2017	April 2017	Grand Tota
- a Opportunity Name	Туре	Drop a field he	Current and Previous 2 FY	to the matri	х.			
- a Type - a Lead Source - a Primary Partner	Existing Customer - Upgrade	create a row g	Current and Next FY Fiscal Quarter Current FQ	\$0,000.00 3 60,000.00	\$995,000.00 4	\$350,000.00	\$270,000.00 3	\$1,855,000.00 11
# Amount # Opportunity Quantity # Expected Revenue			Current and Next FQ Current and Previous FQ Next FQ Record Count	90,000.00 1 • 90.000.00				

Figure 5-22. Opportunity smart date filters

Case Filters

Case filters have some similarities to other objects standard filters and some that are unique to this report type.

• The Show filter on cases allows you to see all your cases, all cases regardless of who owns them, user-owned cases (opposed to queue owned), queue-owned cases, your case team's cases, or role-based team's cases, as shown in Figure 5-23. If you have security set in place with role hierarchies or sharing rules, your users will only be able to see the cases they are set up to see.

Seport Type: Cases Cloud Creations Cases by F	Reason&Origin				
Save Save As Close Report Propertie	es 💽 Run Report				
Q Quick Find Drag and drop to add fields to the report.	dd 💌 cases 🔍 👻 Ay cases Ul cases	Units Ho	v From	To	
→ Add Formula Q B G Bucket Fields M G Add Bucket Field M B G Case Information	Jser owned cases Queue owned cases My case team's cases My role-based team's cases		10-h		

Figure 5-23. Case ownership filter

• The Units filter allows you to display the age of how long your case has been open in minutes, hours, or days, as shown in Figure 5-24.

Cloud Creations (Cases by Reason&Origin						
Save Save As Close	Report Properties Run Report						
Fields All a # 🖸	Filters Add •						
Q. Ouick Find	Show All cases 👻 U	nits Days	2				
Drag and drop to add fields to the report.	Date Field Opened Date Range All Time	e Minutes Hours	То	6			
🖯 🚞 Formulas 🔄	To add filters, click Add.	Days					
J# Add Formula							
Bucket Fields							
Add Bucket Field							
a Case Owner	Preview Summary Format * Show * Ren	nove All Columns					
4 Case Owner Alias	Case Owner Subject		Date/Time Opened	Age	Open	Closed	Account Name
Gase Owner Role Greated By	Case Reason: Installation (3 Records)						
4 Created Alias	Case Origin: Phone (1 Record)						
G Case Last Modified By	Drop a field here to create a grouping.	lide					
Gase Last Modified Alias G Subject	Rachelle Hoffman Delay in installation; spare parts	unavailable	4/21/2017 9:01 AM	и -4	14		Grand Hotels & Resorts Ltd
4 Case Number	Case Origin: Web (2 Records)						
a Parent Case Number	Rachelle Hoffman Seeking guidance on electrical v	viring installation for GC5060	4/21/2017 9:01 AM	N	14	C	United Oil & Gas Corp.
@ Parent Case ID	Rachele Hoffman Easy installation process		4/21/2017 9:01 AM	v -4	14		Express Logistics and Transport
g Status	And the second state of th						-

Figure 5-24. Case units filter

• The case Date Field filter works just like the one for accounts, contacts, leads, and opportunities. You can choose from any date field within that report type to filter from as well use Salesforce smart dates, as shown in Figure 5-25. Smart dates allow you to choose dates that will update to the relative time every time you run your report. For instance, you can choose from the drop-down This Week or Current Calendar Year or use your own custom date range in the From and To fields.

Save Save As Close	Report Properties Run Report							
Fields All a # 🚍	Filters Add •	-						
Q. Quick Find	Show All cases	Vinits Hours						
Drag and drop to add fields to the report.	Date Field Opened Date V Range	Al Time 3	To To					
Formulas Jr Add Formula Bucket Fields Add Bucket Field	To add filters, click Add.	All Time Custom Fiscal Year Current FY						
Case Information	Preview Summary Format * Show	Previous FY Previous 2 FY						
a Case Owner Alias	Case Owner Subject	2 FY Ago	Date/Time Opened	Age	Open	Closed		Account Name
Gase Owner Role Greated By	Case Reason: Installation (3 Records)	Next FY Current and Previous FY						
a Created Allas	Case Origin: Phone (1 Record)	Current and Previous 2 FY						
a Case Last Modified By	Drop a field here to create a group	Current and Next FY						
Gase Last Modified Alias G Subject	Rachele Hoffman Delay in installation; spa	Fiscal Quarter	4/21/2017 9:01 AM	A	-9,933	0	1	Grand Hotels & Resorts Ltd
a Subject	Case Origin: Web (2 Records)	Current FQ						
4 Parent Case Number	Rachelle Hoffman Seeking guidance on ele		4/21/2017 9:01 AM	A	443	1		United Oil & Gas Corp.
a Parent Case ID	⁴ Rachele Hoffman Easy installation proces	Current and Previous FQ Next EQ	4/21/2017 9:01 AM	4	-9,933		1	Express Logistics and Transport

Figure 5-25. Case smart date filter

Campaigns

Campaigns have only one option for standard filtering.

• The Show filter allows you to filter by a specific campaign and provides a lookup field to find it, as shown in Figure 5-26. It also allows you to see all of your active campaigns, campaigns you own, all active campaigns regardless of who owns them, and all campaigns.



Figure 5-26. Campaigns' ownership filter

Field Filters

Field filters in the report builder allow you to drag and drop any field found within that report type and filter your data using operators and values. This field filtering will be important for you to understand because you'll see this same feature used widely throughout Salesforce. You can find this in list views, workflow rules, process builders, and the Apex language. Some of the operators you'll want to familiarize yourself with are as follows: equals, not equal to, less than, greater than, less or equal, greater or equal, contains, does not contain, and starts with. Here is also where you can customize smart dates further if the standard smart date filters don't work for you. Drag and drop the date field of your choice into the filter field section, set the operator to "equals," and use a phrase like Next N Days (replace "N" with your desired number) or Last N Months.

1. Take your field from the left-side Fields section and drag it to the filters section, as shown in Figure 5-27.



Figure 5-27. Dragging and dropping a field onto the field filter section

2. Choose the operator appropriate for your filter, as shown in Figure 5-28.

Report Type: Opportunities with F Cloud Creations C Save Save As Close			1 Report								
Fields All a # C	Filters	Add V All opportunities			Opportu	nity Status Clo	sed Won 🔻 Pi	robability All	T		
Q Quick Find Drag and drop to add fields to the report.	Date Field	Close Date	v F	ange A	Time	• From		То			
Add Formulas Add Formula Add Formula Genetation Add Bucket Field Add Bucket Field Add Bucket Field Coportunty Information Created Alas Last Modified By Last Modified By		Lead Source			equals equals not equal to less than greater than greater or e contains	n bl		S Cock	ed OK Ca	incel	
a Opportunity Name	Preview	Matrix Forma	t • Show		does not co starts with	ntain					
a Type a Lead Source a Primary Partner	pe cisting Custo	omer - Upgrade	Drop a field create a ro		9. Sum of	ummarizable fie f Total Price d Count	Ids into the matri \$240,000.00 3	x. \$995,000.00 4	\$350,000.00 1	\$270,000.00 3	\$1,855,000.00 11

Figure 5-28. Selecting an operator for your field filter

- 3. If the field filter chosen is a picklist field, you can click the lookup icon. If the field is another data type, you can enter the value necessary.
- 4. For picklist fields only, you'll check the values that your filter should include.
- 5. For picklist fields only, click Insert Selected to add these values to your filter, as shown in Figure 5-29.

-												
Save Save As	Close	Report Prop	erties 🕞 Run I	Report								
Fields	II a # 🗆	Filters	Add V									
Q. Quick Find		Show	All opportunities		• Oppor	tunity Status Clo	sed Won 🔻	Probability All	-			
		Date Field	Close Date	V Rar	ge All Time	- From		То				
Drag and drop to add field	ds to the report			1.1121								
Add Formula			Lead Source		• equals	-		9	3	ncel		
Bucket Fields				Selec	t Picklist Value	s - Google Chro	ne			-		×
Add Bucket Fie	bld			-								
Copportunity Inform				Secu	re https://	na50.salesford	2.com/ui/li	ist/FilterLooku	pPage?lookup=L	EAD_SOURCE&r	m=%78	'rt"%3A
a Created By				0 1	ookup							
a Created Alias												
- a Last Modified B		ų		Select t	he picklist val	ues to add belo	Ν.					
a Last Modified A								Insert Selecter	d			
a Opportunity Nat	ime	Preview	Mate Cormat	Deselec	tall							
- a Type - a Lead Source		pe		De V	alue							
4 Primary Partner		cisting Cust	om 4		/eb							
# Amount					hone Inquiry							
# Opportunity Qu	antity	1			artner Referral							
# Expected Reve	inue	4		-								_
# Closed					urchased List							
# Won					ther							_
Close Date												
Close Date (2)								Insert Selecter	5			
Close Month												
Last Stage Cha	inge Date					Co	yright @ 2000-2	2017 salesforce.com	inc. All rights reserved.			
- a Next Step - a Stage												
# Probability (%)												
Fiscal Period												
# Fiscal Year												
# Age												
# Stage Duration												
a Forecast Categ												
a Opportunity ID												
- Last Activity				·								

Figure 5-29. Selecting the field value of a picklist field

6. Click OK to finalize your field filter, as shown in Figure 5-30.

Report Type: Opportunities with P Cloud Creations C	
Fields All a # Q. Quick Find	Filters Add v Show All opportunities v Opportunity Status Closed Won v Probability All v
Drag and drop to add fields to the report.	Date Field Close Date V Range All Time V From To
Formulas Add Formula Bucket Fields Add Bucket Field Opportunity information a Created By a Created Alas a Last Modified By a Last Modified Alas	Lead Source equals Web, Purchased List Locked OK Cancel Cancel

Figure 5-30. Completing your field filter

Note Notice the Locked check box next to the OK button in Figure 5-30. This check box, if selected, allows you to lock the filter on your report so it can't be changed unless the user has the permission to modify reports. Figure 5-31 shows how it is locked.

	tions Opps by Type								
Total Records Total An 10 \$2,37	nount 5,000.00					F	ilters		
TYPE 🕆	OPPORTUNITY OWNER 1	ACCOUNT NAME	OPPORTUNITY NAME	AMOUNT Sum	Role Hi All Opp		es with	Products	
Existing Customer - Upgrade		GenePoint	GenePoint SLA	\$30,000.00	Show N	le			
(5 records)	(5 records)	United Oil & Gas Corp.	United Oil Standby Generators	\$120,000.00	All opp	ortuniti	es		
		United Oil & Gas Corp.	United OII SLA	\$120,000.00	Close Date Current and Next CQ				
		Grand Hotels & Resorts Ltd	Grand Hotels Generator Installations	\$350,000.00					
		United Oil & Gas Corp.	United Oil Installations	\$235,000.00	(Jul 1, 2017 - Dec 31, 2017)				
	Subtotal			\$855,000.00					
Subtotal				\$855,000.00	Locke	ed Filter	5		
New Customer	Rachelle Hoffman	Edge Communications	Edge Emergency Generator	\$75,000.00					
(5 records)	(5 records)	Grand Hotels & Resorts Ltd	Grand Hotels Emergency Generators	\$210,000.00	Existing			omer - U; icement,	grade,
		United Oil & Gas Corp.	United Oil Refinery Generators	\$915,000.00	Existing	Custome	r - Dowr	ngrade, N	PW.
		Burlington Textiles Corp of America	Burlington Textiles Weaving Plant Generator	\$235,000.00					
		GenePoint	GenePoint Standby Generator	\$85,000.00					
	Subtotal			\$1,520,000.00					
Subtotal				\$1,520,000.00					
GRAND TOTAL (10 RECORDS)				\$2,375,000.00					

Figure 5-31. Locked field filters

Filter Logic

After you have set up at least one field filter, filter logic will allow you to apply "and," "or," or "not" statements on how the fields are evaluated. You can create a complex statement of as many field filters that are necessary for your report. If you use filter logic, you do have to include all your field filters in the statement. You can use parentheses to group logic together to further define your report. The default filter logic places AND into the logic, meaning "1 AND 2 AND 3," and so on. This tells the report to only include records that meet all three of the criteria that you've set up (or however many you've set up) into the report.

1. Click the Add button next to Filters and choose Filter Logic.

- Create your statement. You'll use the number next to the field filter to define what field filter needs to be placed with an "and" or "or" statement. The statements that you'll use will look like "(1 OR 2) AND 3 AND 4." Another example would be "1 AND 2 AND 3 AND 4 AND (5 OR 6 OR 7)."
- 3. Click OK to complete your filter logic, as shown in Figure 5-32.



Figure 5-32. Changing the filter logic

Note Every time you add a new field filter, you'll want to adjust your filter logic and ensure it is correct.

Cross Filter

Cross filters in Salesforce allow you to apply conditions on objects related to the current object you are reporting from. You can use cross filters by applying "with" or "without" conditions on the related objects. After you use your cross filter, further define your field filter via that related cross filter. An example of this would be filtering all opportunities without follow-up activities. Or use the cross filter to set up filtering on opportunities without products to determine what opportunities still need to be completed. Another example of using cross filters would be to determine whether an account or contact has had any interaction with your sales team. You can set this up by creating an account or

contact report and adding the cross filter logic of "without" activities. This will give you a list of all the accounts or contacts that need to be reached out to or checked in on. To set this up, create at least one field filter and follow these steps:

- 1. Click the Add button next to Filters and choose Cross Filter.
- 2. Select the primary object that you want to use to relate other objects to.
- 3. Define whether you want to see these related objects with the word "with" or choose "without."
- 4. Select the related object you would like to see or not see.
- 5. Click the Add Related Object filter, select the operator along with the value, and click OK, as shown in Figure 5-33.

Save As Close	Report Properties Run R	eport						
ields All a # C	Add -							
Q. Quick Find	1 All opportunities	V Op	portunity Status Closed	Won Y Prob	ability All	T		
rap and drop to add fields to the report.	Date Field Close Date	Range Al Time	▼ From	6	То	6		
Add Bucket Field Opportunity Information a Created By Created Alas	2 2. Close Date great 3. Amount greater AND Opportunities L Subject L Add Activitie	than "1500.000"	Activities	ow Up		ncel		
a Last Modified By a Last Modified Alias a Opportunity Name	5 Matrix Format	• Show • Remove	All Columns					
a Last Modified Alias a Opportunity Name a Type		 Show • Remove 	All Columns Close Date	January 2017	February 2017	March 2017	April 2017	Grand Total
a Last Modified Alias a Opportunity Name		 Show * Remove 			February 2017	March 2017	April 2017	Grand Total
a Last Modified Alias Opportunity Name Type Lead Source A Primary Partner A Anount		Drop a field here to	Close Date Drop a field here to	ing.		March 2017	April 2017	Grand Total
A Last Modified Alias A Opportunity Name A Type A Lead Source A Primary Partner	Matrix Format		Close Date Drop a field here to create a column group	ing.		March 2017 \$350,000.00 1	April 2017	Grand Total

Figure 5-33. Setting up a cross filter

Row Limit

Row limit filters are used with Tabular reports and allow you to display your report in a table or chart on a dashboard if you limit the number of rows it returns and sort by a field. To create this, follow these steps:

1. Click the Add button and choose Row Limit, as shown in Figure 5-34.

Cloud Creations C						
Save As Close	Report Properties Run	Report				
Fields All a # C	Add V All accounts Date Field Created Date	Range All Time	▼ From	То		
Contact Fields Contact: General Contact Owner Contact Owner Contact Owner Alias Contact Owner Alias Contact Owner Alias Contact Owner Alias Contact	Row Limit 10 2 Preview Tabular Form		3 Columns		Cancel	
- a Created Alias	Salutation First Name	Last Nam Mailing Street			Mailing City	Mailing Sta

Figure 5-34. Setting up the row limit

- 2. Define the row limit.
- 3. Choose to sort by a particular field and whether it is ascending or descending and click OK.

Using the Report Builder

Creating reports in Salesforce allows you to analyze the data you and your user are collecting. Perhaps the best thing about being a newcomer to the reports in Salesforce is that you can't break or ruin your data. All you are doing with reports is displaying the data you currently have in a more readable format, instead of in individual records. Don't be afraid to jump right in and start clicking away!

Creating a Leads Report

You can use lead reports to see some or all key information about your leads. You can see how many leads you have, what lead source is working from your marketing team, the number of leads that are being handled by a user versus the ones that are in a queue, and so much more! One of the many business problems that can be resolved with generating lead reports is considering which lead source is working compared to ones that are not. You can build a report on converted leads and group the report by the lead source, as shown in Figure 5-35.

Lead:	s Converted a	nd Lead Sourc	e					G T	C' 🕸 Edit 🔻
Total Records б									
LEAD SOURCE +	LEAD OWNER	CREATE DATE	FIRST NAME	LAST NAME	TITLE	COMPANY / ACCOUNT	RATING	STREET	EMAJL
Web	Rachelle Hoffman	9/1/2017	Bertha	Baxer	Director of Vendor Relations	Farmers Coop. of Florida	Hot	321 Westcott Building	bertha@fcof.net
(2 records)	Rachelle Hoffman	9/1/2017	Brenda	Mcclure	CFO	Cadinal Inc.			brenda@cardinal.net
Phone Inquiry	Rachelle Hoffman	9/1/2017	Joff	Glimpse	SVP, Procurement	Jackson Controls			jeffg@jackson.com
(2 records)	Rachelle Hoffman	9/1/2017	Violet	Maccleod	VP, Finance	Emerson Transport			violetm@emersontransport.com
Partner Referral (1 record)	Rachelle Hoffman	9/1/2017	Patricia	Feager	CEO	International Shipping Co.			patricia_feager@is.com
Purchased List (1 record)	Rachelle Hoffman	9/1/2017	Sandra	Eberhard	VP, Production	Highland Manufacturing Ltd.			sandra_e@highland.net
GRAND TOTAL (6 RECORDS)									

Figure 5-35. Leads report example

To create a lead report, follow these steps:

1. Navigate to the Reports tab and click Reports, as shown in Figure 5-36.



Figure 5-36. Navigating to the Reports tab

2. Click New Report, as shown in Figure 5-37.

REPORTS Recent 5 items					New Report	New Folder
REPORTS	REPORT NAME	DESCRIPTION	FOLDER	LAST MODIFIED BY	SUBSCRIE	IED
Recent	Leads Converted and L	.ea	Public Reports	Rachelle Hoffman		
Created by Me	Leads grouped by Stat	us	Public Reports	Rachelle Hoffman		
Private Reports	Cloud Creations Opps	by	Public Reports	Rachelle Hoffman		
Public Reports	Cloud Creations Opps	by	Private Reports	Rachelle Hoffman		
All Reports	Cloud Creations Conta	ict	Private Reports	Rachelle Hoffman		

Figure 5-37. Click the New Report button to start a new report

3. In the Quick Find, type **Leads** or click Leads and click Create, as shown in Figure 5-38.

	Select Report Type			
	Q, leads	Preview Account Report		
3	Leads	Account Owner	Account Name	Account Site
	Leads with converted lead information	Joe Johnson Shelly Smith	Acme, Inc Genwatt, Inc	Headquarters Headquarters
	Campaigns Campaigns with Leads	Tom Thompson	Gene Points	Headquarters
	⊖ GActivities ⊢Activities with Leads			

Figure 5-38. Finding the report type to use

4. Click and hold the name of the field you would like to move into your reports and drag it to the column where you would like it to be placed. Continue to drag and drop as many fields as necessary for the report. Once finished, click Save, as shown in Figure 5-39.



Figure 5-39. Dragging and dropping a new field into your report

- 5. Name your report and press your Tab key for Salesforce to automatically enter a value in the Report Unique Name field.
- 6. Enter a description that will be displayed to users.
- 7. Select the report folder where your report should be stored.
- 8. Click Save, as shown in Figure 5-40.

Save Report As	Help for this Page 🥝	×
Report Name	Leads by source	
Report Unique Name	Leads_by_source	i
Report Description	This reports shows all leads grouped by lead source.	6
7 Report Folder	My Personal Custom Reports	
8 Save Sa	ve and Run Report Cancel	

Figure 5-40. Saving your report

9. Click Run Report to see the results of your data, as shown in Figure 5-41.

e Save As Close	Rep	Run Report								
Ids All 4 0	Filters Add									
Construction of Construction	Show Allead	is .	*							
Ouick Find and drop to add fields to the report.	Date Field Create	Date	Range Al Ter	e v From	To Sa					
Formulas	To add filters, clict	k Add.								
Lead General	Preview Summary Format * Show * Remove Al Columns									
a Lead Owner Alas	Lead Owner	First Name	Last Name	Title	Company / Account	Rating	Street	Email		
G Created By	Lead Source:									
G Created Alias										
a Last Modified By	Contraction of the Association of the	d here to create a								
4 Last Modified Alias	Rachelle Hoffman	Bertha	Boxer	Director of Vendor Relations	Farmers Coop. of Florida	Hot	321 Westcott Building	bertha@fcof.net		
a Salutation	Rachele Hoffman	Phylis	Cotton	CFO	Abbott Insurance	a.;	*	pcotton@abbottins.net		
d First Name	Rachelle Hoffman	Brenda	Mcclure	CFO	Cadinal Inc.		*	brenda@cardinal.net		
a Last Name	Rachelle Hoffman	Tom	James	SVP, Production	Delphi Chemicals	*		tom james@delphi.chemicals.com		
a Title	Rachelle Hoffman	Norm	May	VP. Facilities	Greenwich Media			norm_may@greenwich.net		
a Company / Account	< Rachele Hoffman	Jack	Rogers	VP, Facilities	Burlington Textiles Corp of America	Wanm	525 S. Lexington Ave	jrogers@blca.com		
a Description	Rachelle Hoffman	E4	Dadio Jr	CFO	Zenith Industrial Partners			bil_dadio@zenith.com		
a Industry	Lead Source:	Phone Inquiry (4	Records)							
# Industry # Annual Revenue	Rachelle Hoffman	Jeff	Glimpse	SVP, Procurement	Jackson Controls			jeffg@jackson.com		
a Lead Status	Rachelle Hoffman	Violet	Maccleod	VP. Finance	Emerson Transport			violetm@emersontransport.com		
4 Rating	Rachelle Hoffman	Pat	Stumuler	SVP, Administration and Finance	Pyramid Construction Inc.		*	pat@pyramid.net		
# No. of Employees	Rachelle Hoffman	Carolyn	Crenshaw	VP. Technology	Ace Iron and Steel Inc.			carolync@aceis.com		
G Company D-U-N-S Number	Lead Source:	Partner Referral (4 Records)							
# Converted	Rachele Hoffman	Patricia	Feager	CEO	International Shipping Co.		• · ·	patricia_feager@is.com		
# Unread By Owner	Rachele Hoffman	Shell/	Brownell	SVP, Technology	Western Telecommunications Corp.			shelyb@westerntelecom.com		
Create Date	Rachele Hoffman	Pamela	Owenby	SVP, Technology	Hendrickson Trading		•/	pam_overby@hendricksontrading.com		
Created Month	Rachele Hoffman	Kristen	Akin	Director, Warehouse Mont	Aethna Home Products			kakin@athenahome.com		
Last Modified		Purchased List (
(Owner Role Display	Rachele Hoffman	Mae	Braund	VP. Technology	Metropoltan Health Services	- 24	2	ikeb@metro.com		
G Owner Role Name	Rachele Hoffman	Kathy	Snyder	Regional General Manager	TNR Corp.			k synder@trx.net		
a Lead ID	Rachelle Hoffman	Andy	Young	SVP, Operations	Dickenson pic	-		a_young@dickenson.com		
Last Activity	Rachelle Hoffman	David	Monace	CFO	Blues Entertainment Corp.			david@blues.com		
d Data com Key	Rachele Hoffman		Luce	CEO	Pacific Retail Group			david@blues.com eluce@pacificretal.com		
g Clean Status	Hachese Hoffman	Eugena	Luce	CEO	Pacific Hetas Group		*	encegpacecretal com		

Figure 5-41. Running your report to see your results

Creating Contacts and Accounts Report

You can create a contacts and accounts report to display all your contact details. Use this report for a call list, mail merges, viewing newly created contacts and accounts, or any other business needs. Business-to-business (B2B) organizations can benefit from the use of account reports if they want to determine the types of industries they work with. You can generate a report that shows you how many businesses you are engaging with in each industry. This would help you to determine where you should focus your marketing efforts. You can see what this report would look like in Figure 5-42.

INDUSTRY +	ACCOUNT OWNER	ACCOUNT NAME	TYPE	RATING	LAST ACTIVITY	LAST MODIFIED DATE	BILLING STATE/PROVINCE
Agriculture (1 record)	Rachelle Hoffman	Farmers Coop. of Florida	2	Hot		9/3/2017	FL
Apparel (1 record)	Rachelle Hoffman	Burlington Textiles Corp of America	Customer - Direct	Warm	· ·	9/1/2017	NC
Biotechnology (1 record)	Rachelle Hoffman	GenePoint	Customer - Channel	Cold		9/1/2017	CA
Construction (1 record)	Rachelle Hoffman	Pyramid Construction Inc.	Customer - Channel			9/1/2017	
Consulting (1 record)	Rachelle Hoffman	Dickenson plc	Customer - Channel			9/1/2017	кs
Education (1 record)	Rachelle Hoffman	University of Arizona	Customer - Direct	Warm		9/1/2017	AZ
Electronics (1 record)	Rachelle Hoffman	Edge Communications	Customer - Direct	Hot		9/1/2017	тх
Energy	Rachelle Hoffman	United Oil & Gas Corp.	Customer - Direct	Hot		9/1/2017	NY
(3 records)	Rachelle Hoffman	United Oil & Gas, Singapore	Customer - Direct	-		9/1/2017	Singapore
	Rachelle Hoffman	United Oil & Gas, UK	Customer - Direct	*:		9/1/2017	UK
Hospitality (1 record)	Rachelle Hoffman	Grand Hotels & Resorts Ltd	Customer - Direct	Warm		9/1/2017	IL.
Transportation (1 record)	Rachelle Hoffman	Express Logistics and Transport	Customer - Channel	Cold		9/1/2017	OR

Figure 5-42. Accounts and contacts report example

To create a contacts and accounts report:

- 1. Navigate to the Reports tab and click Reports; once you see your report folders, click New Reports in the right corner.
- 2. In the Quick Find area, type **Contact**. Or, click Accounts, click Contacts & Accounts, and click Create, as shown in Figure 5-43.



CHAPTER 5 LIGHTNING REPORTS AND DASHBOARDS

Figure 5-43. Selecting the report type for your report

3. Click and hold the name of the field you want to move into your reports and drag it to the column where you would like it to be placed. Continue to drag and drop as many fields as necessary for the report. Once finished, click Save, as shown in Figure 5-44.

Save As Close	à Report Prope	rties						
ields All a #	Filters	Add v						
	Show	My contacts		*				
ek Find	Date Field	Created Date	V Rang	Custom V From \$/28/20	217 🗐 To	8		
top to add fields to the report			100			1.8		
t Fields	 To add filter 	s, click Add.						
To tact General								
() Contact Owner								
@ Contact Owner Alias								*
@ Created By	Preview	Tabolar	Chow *	Remove All Columns				
Created Alias Last Modified By	Salutation	First Name	Last Name	100	Mobile	Email	Account Owner	Account Name
I Last Modified Alias	Ms.	Rose	Gonzalez	SVP, Procurement		rose@edge.com	Rachele Hoffman	Edge Communications
@ Salutation	Mr.	Sean	Forbes	CFO	(512) 757-4501		9	Edge Communications
		Jack	Ropers	VP. Facilities		yogers@burlifgio	R Contact Owner	Burlington Textiles Corp of Americ
@ First Name	Mr.	190K						
- a Last Name	Mr. Ma.	Pat	Stumuller	SVP, Administration and Finance	(014) 454-6364	pat@pyramid.net	Rachelle Hoffman	Pyramid Construction Inc.
- @ Last Name - @ Title				SVP. Administration and Finance SVP. Operations	(014) 454-6364 (785) 265-5350		Rachele Hoffman Rachele Hoffman	Pyramid Construction Inc. Dickenson plo
- @ Last Name - @ Title - @ Department	Ma.	Pat	Stumuller			pat@pyramid.net	A Real Property and the second s	
- @ Last Name - @ Title	Ms. Mr	Pat Andy	Stumulier Young	SVP. Operations	(785) 265-5350	pat@oyramid.net a_young@dickenson.com	Rachele Hoffman	Dickenson plo
- d Last Name - d Tite - d Department - Bisthdate	Ms. Mr Mr.	Pat Andy Tim	Stumulier Young Barr	SVP. Operations SVP. Administration and Finance	(785) 265-5350 (312) 596-1230	pat@oyramid.net a_young@dickenson.com barr_tim@grandhotels.com	Rachele Hoffman Rachele Hoffman	Dickenson plo Grand Hotels & Resorts Ltd
a Last Name a Title a Department Bimdate a Lead Source a Assistant a Assist Phone	Ma. Mr Mr. Mt.	Pat Andy Tim John	Stumulier Voung Barr Bond	SVP. Operations SVP. Administration and Finance VP. Facilities	(785) 265-5350 (312) 596-1230 (312) 596-1563	pat@pyramid.net a_young@dickenson.com barr_tim@grandhotels.com bond_john@grandhotels.com	Rachele Hoffman Rachele Hoffman Rachele Hoffman	Dickenson plo Grand Hotels & Resorts Ltd Grand Hotels & Resorts Ltd
Last Name Lost Name Department Department Lead Source Lead Source Assistant Assist	Ma. Mr Mr. Mr. Ma.	Pat Andy Tim John Bertha	Stumulier Young Barr Bond Boxer	SVP. Operations SVP. Administration and Finance VP. Facilities Director of Vendor Relations	(785) 265-5350 (312) 596-1230 (312) 596-1563	pat@pyramid.net a_ysoung@diokenson.com barr_tim@grandhotels.com bond_john@grandhotels.com bertha@foof.net	Rachele Hofiman Rachele Hofiman Rachele Hofiman Rachele Hofiman	Dickenson plo Grand Hotels & Resorts Ltd Grand Hotels & Resorts Ltd Farmers Coop. of Florida
Last Name Tole Tole Tole Department Bimdase Lead Source Assistant Asst.Phone Owner Role Display Owner Role Name	Ms. Mr Mr. Ms. Ms.	Pat Andy Tim John Bertha Patricia	Stumulier Young Barr Bond Boxer Feager	SVP. Operations SVP, Administration and Finance VP, Facilities Director of Vendor Relations CEO	(785) 265-5350 (312) 596-1230 (312) 596-1563 -	pat@pyramid.net a_young@diokenson.com barr_tim@grandhotels.com bond_john@grandhotels.com bertha@foof.net patricia_feager@is.com	Rachele Hofiman Rachele Hofiman Rachele Hofiman Rachele Hofiman Rachele Hofiman	Dickenson pic Grand Hotels & Resorts Ltd Grand Hotels & Resorts Ltd Farmers Coop. of Florida International Shipping Co.
List Name Trie Department Bimdase Lead Source Assistant Assistant Owner Role Display	Ms. Mr Mr. Ms. Ms. Ms Ms	Pat Andy Tim John Bertha Patricia Brenda	Stumulier Young Barr Bond Boxer Feager Moclure	SVP. Operations SVP. Administration and Finance VP. Facilities Director of Vendor Relations CEO CFO	(785) 265-5350 (312) 596-1230 (312) 596-1563 - -	pst@pyramid net a_young@dickenson.com barr_tim@granchotels.com bord_ubrn@granchotels.com bertha@contonet patrica_teager@is.com brenda@contonal.net	Rachele Hoffman Rachele Hoffman Rachele Hoffman Rachele Hoffman Rachele Hoffman Rachele Hoffman	Dickenson pio Grand Hotels & Resorts Ltd Grand Hotels & Resorts Ltd Parmers Coop. of Florida International Shipping Co. Cadinal Inc.

Figure 5-44. Dragging and dropping a field into your report

- 4. Name your report and click your Tab key for Salesforce to automatically enter a value in the Report Unique Name field.
- 5. Enter a description that will be displayed to users.
- 6. Select the report folder where your report should be stored.
- 7. Click Save, as shown in Figure 5-45.

Save Report	Help for this Pa	ge 🕜 🗙
4 Report Name	Cloud Creations Contact Mailing List	
Report Unique Name	Cloud_Creations_Contact_Mailing_List	1
Report Description	Mailing list for all contacts who expresse interest in our packages.	d _ 5
6 Report Folder	My Personal Custom Reports	•
7 54	ave Cancel	

Figure 5-45. Saving your report

8. Click Run Report to see the results of your data, as shown in Figure 5-46.

e Save As Close	Report Prop	erties 🕞 Run R	sport						
ds All a P D	Filters	Add v		-					
Quick Find	Show	My contacts	-	•					
and drop to add fields to the report.	Date Field	Created Date	· Rang	Custom V	From 10000000 10 To				
Bucket Fields	To add 500	irs, cick Add.							
Add Bucket Field	10 800 114	era, unun raute.							
ontact: General Contact Owner									
Contact Owner Alias									
Created By	Preview	Tabular Format	* Show *	Remove Al Columns					
Created Alias	Salutation	First Name	Last Name	Contact Owner	Title	Mobile	Email	Account Owner	Account Name
Last Modified By	Ms.	Rose	Gonzalez	Rachelle Hoffman	SVP. Procurement	(512) 757-9340	rose@edge.com	Rachele Hoffman	Edge Communications
Salutation	Mc	Sean	Forbes	Rachelle Hoffman	CFO	(512) 757-4561	sean@edge.com	Rachele Hoffman	Edge Communications
First Name	Mr.	Jack	Rogers	Rachelle Hoffman	VP, Faolities		jrogers@ourlington.com	Rachelle Hoffman	Burlington Textiles Corp of Amer
Last Name	Ms.	Pat	Stumulier	Rachelle Hoffman	SVP, Administration and Finance	(014) 454-6364	pat@pyramid.net	Rachelle Hoffman	Pyramid Construction Inc.
Trie Department	Mr	Andy	Young	Rachelle Hoffman	SVP. Operations	(785) 265-5350	a_young@dickenson.com	Rachele Hoffman	Dickenson plo
Brthdate	Mr.	Tim	Barr	Rachelle Hoffman	SVP, Administration and Finance	(312) 596-1230	barr_tim@grandhotels.com	Rachelle Hoffman	Grand Hotels & Resorts Ltd
Lead Source	Mr.	John	Bond	Rachelle Hoffman	VP, Faolities	(312) 596-1563	bond_john@grandhotels.com	Rachele Hoffman	Grand Hotels & Resorts Ltd
	M&	Betha	Boxer	Rachalle Hoffman	Director of Vendor Relations		berna@foof.net	Rachele Hoffman	Farmers Coop. of Florida
Assistant							patricia feaper@is.com	Rachelle Hoffman	International Shipping Co.
Asst. Phone	Ms	Patricia	Feager	Rachelle Hoffman	CEO	•	patrola_teaper@is.com	Hadhele Homman	international phipping Co.
Asst. Phone Owner Role Display	Ms Ms	Patricia Brenda	Feager Moolure	Rachelle Hoffman Rachelle Hoffman	CEO CFO		brenda@cardinal.net	Rachele Hofman	Cadinal Inc.
a Assistant a Asst. Phone g Oaner Role Display g Oaner Role Name □ Last Activity						•			

Figure 5-46. Running your report to see the results

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Creating an Opportunity Report

You can create an opportunity report and opportunity with products report to display the sales your company has generated. Use these report types to display what is in the pipeline, what has dropped out of the pipeline, and all sales that your team has successfully won. Most businesses will generate opportunity reports to help project what efforts may be needed in the future. For instance, project management companies need to project how many projects they have now and how many projects may be closing or starting in the future. Being able to project this is necessary to the operations of the business. Project management companies need to be able to project how many project managers or internal support are going to be needed in the upcoming months. To project this, a project management company will look at all sales with a 90 percent or higher opportunity probability. Figure 5-47 shows what this report would look like.

	otal Amount 1,955,000.00					
						AMOUNT
STAGE 🕆	PROBABILITY (%) †	OPPORTUNITY OWNER	ACCOUNT NAME	OPPORTUNITY NAME	TYPE	Sum
Qualification (1 record)	10% (1 record)	Rachelle Hoffman	Dickenson pic	Dickenson Mobile Generators	New Customer	\$15,000.00
	Subtotal					\$15,000.00
Subtotal						\$15,000.00
Needs Analysis (1 record)	95% (1 record)	Rachelle Hoffman	United Oli & Gas Corp.	United OII Plant Standby Generators	Existing Customer - Upgrade	\$675,000.00
	Subtotal					\$675,000.00
Subtotal						\$675,000.00
/alue Proposition 50% 2 records) (1 record)		Rachelle Hoffman	Grand Hotels & Resorts Ltd	Grand Hotels Guest Portable Generators	Existing Customer - Upgrade	\$250,000.00
	Subtotal					\$250,000.00
	90% (1 record)	Rachelle Hoffman	Express Logistics and Transport	Express Logistics Portable Truck Generators	Existing Customer - Upgrade	\$80,000.00
	Subtotal					\$80,000.00
Subtotal						\$330,000.00
Id. Decision Makers (2 records)	60% (1 record)	Rachelle Hoffman	Grand Hotels & Resorts Ltd	Grand Hotels Kitchen Generator	Existing Customer - Upgrade	\$15,000.00
	Subtotal					\$15,000.00
	95% (1 record)	Rachelle Hoffman	Edge Communications	Edge Emergency Generator	Existing Customer - Replacement	\$35,000.00
	Subtotal					\$35,000.00
Subtotal						\$50,000.00
Perception Analysis (1 record)	70% (1 record)	Rachelle Hoffman	Express Logistics and Transport	Express Logistics SLA	Existing Customer - Upgrade	\$120,000.00
	Subtotal					\$120,000.00
Subtotal						\$120,000.00
Proposal/Price Quote (2 records)	75%6 (1 record)	Rachelle Hoffman	United Oli & Gas Corp.	United OII Refinery Generators	Existing Customer - Upgrade	\$270,000.00
	Subtotal					\$270,000.00
	9996 (1 record)	Rachelle Hoffman	University of Arizona	University of AZ Installations	Existing Customer - Upgrade	\$100,000.00
	Subtotal					\$100,000.00

Figure 5-47. Opportunity report example
To create an opportunity report, follow these steps:

- 1. Navigate to the Reports tab and click Reports; once you see your report folders, click New Reports in the right corner.
- 2. In the Quick Find area, type **Opportunity**. Or, click Opportunity and click Create, as shown in Figure 5-48.

Select Report Types to Hide () Select Report Type						
Q. Opportunities	0	Preview				
 2 Bog Opportunities	0	Opportunity - Pro	duct Report			
Coportunities			Product Name			
Opportunities with Products		Opportunity Stage	Generators	Widgets	Service	Grand Total
Opportunities with Contact Roles		Qualification	\$125,000	\$75,000	\$115,000	\$315,000
Opportunities with Partners Opportunities with Competitors		Need Analysis	\$350,000	\$67,000	\$89,000	\$506,000
Opportunities with Competitors Opportunities with Contact Roles and Products		Negotiations	\$230,000	\$43,000	\$65,000	\$338,000
Accounts, Opportunities and contact roles		Grand Total:				\$1,159,000
Campaigns with Opportunities Campaigns with Influenced Opportunities Campaigns with Influenced Opportunities Activities Activities Activities Campaignee Products and Assets Products with Opportunities						

Figure 5-48. Selecting the report type for your report

3. Click Show and select Details, as shown in Figure 5-49.

Save Save As Close		erties									
Fields All a # 📼	Filters	Add 💌									
Q. Quick Find	Show	All opportunities		•	Opportunity	Status	Open		Probabilit	All	¥
Drag and drop to add fields to the report.	Date Field	Close Date	V R	ange	Current FQ	¥	From 7/	1/2017	6	To 9/30/2017	
Add Bucket Field Opportunity Information Created By Created Alias Last Modified By	Preview	3 Tabular Format	* Show	· F	temove All Colu	umns					
a Last Modified Alias	Total Price			Details							
- a Opportunity Name - a Type - a Lead Source	Grand Tota	ls (12 records) \$1,405,000.00									
- @ Primary Partner - # Amount - # Opportunity Quantity	This previ	ew shows a limited	d number	of rec	ords. Run the	repo	rt to see	all resul	lts.		

Figure 5-49. Showing the details on a report

4. Select the proper filters for your report to show the data desired, as shown in Figure 5-50.

Save Save As Close	Report Properties				
elds All a # 🗆	Filters Add V				
Quick Find	Show All opportunities	Opportunity Status Open	Probability All		
rag and drop to add fields to the	ate Field Close Date V Ra	nge Current FQ V From 7/1/201	17 💼 To 9/3	0/2017	
Bucket Fields Add Bucket Field Copportunity Information Created By Created Alias	To add filters, click Add.				
# Last Modified By	Preview Tabular Format * Show	Remove All Columns			
@ Last Modified Alias	Opportunity Name	Туре	Amount	Close Date	Stage
- a Opportunity Name - a Type	Pyramid Emergency Generators		\$100,000.00	7/7/2017	Prospecting
4 Lead Source	Dickenson Mobile Generators	New Customer	\$15,000.00	7/11/2017	Qualification
4 Primary Partner	United Oil Plant Standby Generators	Existing Customer - Upgrade	\$675,000.00	7/23/2017	Needs Analysis
# Amount	United Oil Refinery Generators	Existing Customer - Upgrade	\$270,000.00	8/13/2017	Proposal/Price Quo
# Opportunity Quantity # Expected Revenue	GenePoint Lab Generators		\$60,000.00	8/22/2017	Id. Decision Makers
# Closed	Grand Hotels Guest Portable Generators	Existing Customer - Upgrade	\$250,000.00	8/28/2017	Value Proposition
# Won	Edge Emergency Generator	Existing Customer - Replacement	\$35,000.00	9/3/2017	Id. Decision Makers
				9/30/2017	Perception Analysis
Close Date	Jackson Controls Opp				Prospecting
Close Date Close Date (2) Close Month Last Stage Change Date	International Shipping Co.	•			Prospecting
Close Date Close Date (2) Close Month				9/30/2017	Prospecting Prospecting

Figure 5-50. Setting up the report field filters for your report

5. Click and hold the name of the field you would like to move into your reports and drag it to the column where you would like it to be placed. Continue to drag and drop as many fields as necessary for the report. Once finished, click Save, as shown in Figure 5-51.

Save As Close	Report Properties							
Fields All a # D	Filters Add •							
Q. Quick Find	Show All opportunities	Opportunity Status Open	Probability All					
Drag and drop to add fields to the report.	Date Field Close Date V Ran	QR Current PQ + From 7/1/201	7 6 10 93	0/2017				
Bucket Fields	To add filters, click Add.							
S Add Bucket Field								
Created By								
@ Created Alias				4				
a Last Modified By	Preview Tabular Format * Show	 Remove All Columns 						
g Last Modified Alias g Opportunity Name	Opportunity Name	Туре	Amount	Close Date	Stage	Probability (%)		Product Nat
a Type	Pyramid Emergency Generators	*	\$100.000.00	7/7/2017	Prospecting	90%	9/1/2017	
A Lead Source	Colores Maria Garantee	New Contents	\$15,000.00	7/11/2017	Qualification	10%	9/1/2017	
a Primary Partner # Amount	United Oil Plant Staffooy Generation	and the second	Lead Source	7/23/2017	Needs Analysis	95%	9/1/2017	
		Existing Customer - Upgrade	3210/000/00	8/13/2017	Proposal Price Quote	75%	9/1/2017	-
# Amount # Opportunity Quantity	United Oil Refinery Generators	Existing Customer - Opgrade	8410,000,00					
# Opportunity Quantity # Expected Revenue	United Oil Refinery Generators GenePoint Lab Generators	Exacting Costomer - Opgrade	\$60,000.00	8/22/2017	Id. Decision Makers	60%	9/1/2017	
# Opportunity Quantity # Expected Revenue # Closed	A second s	Existing Customer - Upgrade Existing Customer - Upgrade			Id. Decision Makers Value Proposition	60% 50%		
# Opportunity Quantity # Expected Revenue # Closed # Won	GenePoint Lab Generators		\$60,000.00	8/28/2017			9/1/2017	
# Opportunity Quantity # Expected Revenue # Closed	GenePoint Lab Generators Grand Hotels Quest Portable Generators	- Existing Customer - Upgrade	\$60,000.00 \$260,000.00	8/28/2017 9/3/2017	Value Proposition	50%	9/1/2017 9/1/2017	
# Opportunity Quantity # Expected Revenue # Close Date © Close Date © Close Date (2) © Close March (2)	GenePoint Lab Generators Grand Hotels Ouest Portable Generators Edge Emergency Generator	- Existing Customer - Upgrade	\$60,000.00 \$260,000.00 \$36,000.00	8/28/2017 9/3/2017 9/30/2017	Value Proposition Id. Decision Makers	50% 95%	9/1/2017 9/1/2017 9/3/2017	
# Oppertunity Quantity # Expected Revenue # Crosed # Won © Crose Date © Crose Date © Crose Date © Crose Date © Crose Mortin © Listic Stope Change Date	GenePoint Lab Generators Orand Hotels Guest Portable Generators Edge Emergency Generator Jackson Controls Opp	- Existing Customer - Upgrade	\$60,000.00 \$260,000.00 \$36,000.00	8/28/2017 9/3/2017 9/30/2017 9/30/2017	Value Proposition Id. Decision Makers Perception Analysis	60% 95% 70%	9/1/2017 9/1/2017 9/3/2017 9/3/2017	
# Opportunity Quantity # Expected Revenue # Closed # With © Close Date (2) © Close Date (2) © Close Marte (2)	GenePoint Lab Generators Grand Hotels Quest Portable Generators Edge Emergency Generator Jackson Controls Opp International Shipping Co.	Existing Customer - Upgrade Existing Customer - Replacement	\$60,000.00 \$260,000.00 \$36,000.00 -	8/28/2017 9/3/2017 9/30/2017 9/30/2017 9/30/2017	Value Proposition Id. Decision Makers Perception Analysis Prospecting	60% 95% 70% 10%	0/1/2017 0/1/2017 0/3/2017 0/3/2017 0/3/2017	•

Figure 5-51. Dragging and dropping a field into your report

- 6. Name your report and press your Tab key for Salesforce to automatically enter a value in the Report Unique Name field.
- 7. Enter a description that will be displayed to users.
- 8. Select the report folder where your report should be stored.
- 9. Click Save, as shown in Figure 5-52.

Save Report	Help for this Pag	e 🕜	×
6 Report Name	Cloud Creations Opportunity & Products	_	50
Report Unique Name	Cloud_Creations_Opportunity_Products		1
Report Description	This report shows all open opportunities with products.	7	7
Report Folder Hierarchy Level	My Personal Custom Reports	•	30 30
9 5	ave Cancel		30

Figure 5-52. Saving your report

10. Click Run Report to see the results of your data.

Creating Tabular, Summary, and Matrix Reports

Tabular reports are the default report selected when creating a new report. Once you have chosen your report type and are in the report builder, you can switch between all three report formats. If switching from the Summary or Matrix report format to Tabular, you'll want to take the fields you grouped and move them to a column; otherwise, you'll lose them and have to bring them back to the report once in Tabular format. When switching from a Matrix report to a Summary report, be aware that you may lose groupings here as well if you have set up four groupings on the Matrix report; Summary reports can handle only up to three groupings. Let's look at creating Tabular, Summary, and Matrix reports.

- 1. Navigate to the Reports tab and click Reports; once you see your report folders, click New Reports in the right corner.
- 2. Choose the report type of your choice and click Create, as shown in Figure 5-53.

1-1-1-10-10-1	٩	Search Salesforce
Cloud Creations	Home Chatter Leads 🗸 Accounts 🗸 Contacts 🗸 Cases	🗸 Opportunities 🗸 Reports 🗸 Dashboards 🗸
캳 Create New Re	Select Report Types to Hide 3	
	Q, Quick Find	Preview Contact Report
	Accounts	Account Name Contact Name Title Phone
	Contacts & Accounts	Gene Point Edna Frank VP Technology (212) 555-1234
	2 Accounts with Partners	Gerwatt, Inc Stella Pavlova VP Operations (415) 555-9826
	Account with Account Teams Accounts with Accounts Roles Accounts with Assets Contacts with Assets Contacts with Assets Contact History Contact History D&B Company with and without Accounts @: Opportunities @: Costomer Support Reports @: Leads @: Leads @: Leads @: Leads @: Contracts and Orders @: Contracts and Orders #	Gernwett, Inc Lauren Boyle CEO (310) 555-5678
		Cancel

Figure 5-53. Selecting the report type for your report

3. In the Preview pane of the report builder, choose the drop-down that displays Tabular Format and switch to the report format of your choice, as shown in Figure 5-54.

Paper Type: Contacts & Accor Unsaved Report						Guided Tour Video Tutorial Help for t
Save As Close	& Report Prope	rties				
Fields All () () () () () () () () () () () () ()	Show Date Field	Add W My contacts Created Date V Ra click Add.	Prom 9312	017 D To	a	
a Contact Owner Alias Created By	Preview	Tabular Format * Show	Remove All Columns			
a Created By a Created Alias	Preview Salutation	Tabular Format Show Tabular	Remove All Columns Title	Mobile	Email	Account Name
Created By Greated Alias Greated Alias GLast Modified By		Tabular	7	Mobile (512) 757-9340	Email rose@edge.com	Account Name Edge Communications
a Created By a Created Alias a Last Modified By a Last Modified Alias	Salutation	Tabular	Title			
a Created By a Created Alias a Last Modified By	Salutation Ms.	Tabular	Title SVP. Procurement	(512) 757-9340	rose@edge.com	Edge Communications

Figure 5-54. Changing report formats

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Building a Tabular Report

Follow these steps:

 To build a Tabular report, there is no need to change the format drop-down. Just begin dragging and dropping your fields as needed for your report. Once finished, click Save, name your report, and click Run to see your results, as shown in Figure 5-55.

Save Save As Close	à Report Properties								
Fields All a # 🖘	Filters Add •								
Q. Quick Find	Show All opportunities V Opportunity Status Oppen V Probability Ag V								
Drag and drop to add fields to the report.	Date Field Cose Date V Range Current FQ V From 7/12017 1 10 0302017								
Bucket Fields	To add filters, cick Add								
Add Bucket Field									
Created By									
Created By									
a Last Modified By	Preview Tabular Format * Show	 Remove All Columns 							
Last Modified Allas Goportunity Name	Opportunity Name	Туре	Amount	Close Date	Stage	Probability (%)	Created Date	Product	
il Type	Pyramid Emergency Generators		\$100,000.00	7/7/2017	Prospecting	90%	9/1/2017		
U Lead Source	Distance Mable Generation	No. C. Alexander	\$15,000.00	7/11/2017	Qualification	10%	9/1/2017	-	
@ Primary Partner	United Oil Plant Standby General -		Lead Source	7/23/2017	Needs Analysis	95%	9/1/2017		
g Primary Pather g Amount	United Oil Plant Standby Generators	Existing Customer - Upgrade	Lead Source		Needs Analysis Proposal/Price Quote	95% 75%			
() Primary Partner # Amount # Opportunity Quantity # Expected Revenue		Existing Customer - Upgrade		8/13/2017			9/1/2017		
L Primary Pather # Amount # Opportunity Quantity # Expected Revenue # Cosed	United OI Refinery Generators	Existing Customer - Upgrade • Existing Customer - Upgrade	\$270,000.00	8/13/2017 8/22/2017	Proposal/Price Quote	75%	9/1/2017 9/1/2017		
A Primary Partner A Amount A Opportunity Quantity B Expected Revenue	United Oil Refinery Generators GenePoint Lab Generators		300,000.00	8/13/2017 8/22/2017 8/28/2017	Proposal/Price Quote Id. Decision Makers	75%	9/1/2017 9/1/2017 9/1/2017		
2 Primary Partner # Amount # Opportunity Quantity # Excerted Revenue # Closed # Won	United OI Refinery Generators GenePoint Lab Generators Grand Hotels Guest Portable Generators	• Existing Customer - Upgrade	\$270,000.00 \$60,000.00 \$250,000.00	8/13/2017 8/22/2017 8/28/2017 9/3/2017	Proposal Price Quote Id. Decision Makers Value Proposition	75% 60% 50%	9/1/2017 9/1/2017 9/1/2017 9/1/2017		
A Privacy Pather A Anout A Anout A Coponity Quantity Expected Revenue Vion Cose Date Cose Date Cose Date (2) Cose Mont	United OII Refinery Generators Gene/Point Lab Generators Grand Hotels Guest Portable Generators Edge Emergency Generator	• Existing Customer - Upgrade Existing Customer - Replacement	\$270,000,00 \$60,000,00 \$250,000,00 \$35,000,00	8/13/2017 8/22/2017 8/28/2017 9/3/2017 9/3/2017 9/3/2017	Proposal/Price Quote Id. Decision Makers Value Proposition Id. Decision Makers	75% 60% 50%	9/1/2017 9/1/2017 9/1/2017 9/1/2017 9/1/2017 9/3/2017		
g Primary Partner # Amount # Dopertunity Guantity # Expected Remnue # Cose # Won © Cose Date © Cose Date (2) © Cose Mont E Last Stage Change Date	United OI: Refinery Generators GenePoint Lab Generators Grand Hotels Guest Portable Generators Edge Emergency Generator Jackson Controls Opp	• Existing Customer - Upgrade Existing Customer - Replacement •	2210.000.00 360.000.00 5250.000.00 \$35.000.00	8/13/2017 8/23/2017 8/28/2017 9/3/2017 9/30/2017 9/30/2017	Proposal/Price Quote Id. Decision Makers Value Proposition Id. Decision Makers Perception Analysis	75% 60% 50% 95% 70%	9/1/2017 9/1/2017 9/1/2017 9/1/2017 9/1/2017 9/3/2017 9/3/2017	• • • •	
A Privacy Pacher A Anount A Anount A Anount Cosed Vion Cose Date Cose Date Cose Date Cose Date Cose Date Cose Mortin	Unted OI Refnery Generators GeneRoint Lab Generators Grand Hobia Guest Porsola Generators Edge Emergency Generator Jackson Controla Goo International Shipping Co.	Existing Customer - Upprade Existing Customer - Replacement	2250,000,00 \$80,000,00 \$250,000,00 \$35,000,00	8/13/2017 8/23/2017 8/25/2017 9/3/2017 9/30/2017 9/30/2017 9/30/2017	Proposal Price Quote Id: Decision Makers Value Proposition Id: Decision Makers Perception Analysis Prospecting	75% 60% 50% 70% 10%	9112017 9112017 9112017 9112017 9112017 9112017 912017 912017		

Figure 5-55. Dragging and dropping fields into your report

2. You can also choose what field your Tabular report should sort by, by clicking that field. Notice that when you click the field, an arrow is added to that field facing up or down. This tells you if it is sorting this field in ascending or descending order, as shown in Figure 5-56.

Save Save As Close	Report Properties						
All a	Filters Add Show All oppor Date Field Close Da To add filters, click A	tunities V Oppo te V Range Current	rtunity Status Open Probability A FQ Prom 7/1/2017 F0 To	u v 9202017			
Created By Created By Created Alias Last Modified By Last Modified Alias Coportunity Name	Preview Tabula Opportunity Owner	r Format + Show + Remove Account Name	All Columns Opportunity Name	Туре	Close Date	stage	2 Amount -
- d Type	Rachelle Hoffman	United Oil & Gas Corp.	United Oil Plant Standby Generators	Existing Customer - Upgrade	7/23/2017	Needs Analysis	\$675,000.0
g Lead Source	Rachelle Hoffman	United Oil & Gas Corp.	United Oil Refinery Generators	Existing Customer - Upgrade	8/13/2017	Proposal/Price Quote	\$270,000.0
@ Primary Partner	Rachelle Hoffman	Grand Hotels & Resorts Ltd	Grand Hotels Guest Portable Generators	Existing Customer - Upgrade	8/28/2017	Value Proposition	\$250,000.0
# Amount	Rachelle Hoffman	Pyramid Construction Inc.	Pyramid Emergency Generators		7/7/2017	Prospecting	\$100,000.0
# Opportunity Quantity	Rachelle Hoffman	GenePoint	GenePoint Lab Generators		8/22/2017	Id. Decision Makers	\$60,000.0
# Expected Revenue # Closed	Rachelle Hoffman	Edge Communications	Edge Emergency Generator	Existing Customer - Replacement	9/3/2017	Id. Decision Makers	\$35,000.0
# Won	Rachelle Hoffman	Dickenson plc	Dickenson Mobile Generators	New Customer	7/11/2017	Qualification	\$15,000.0
Close Date	Rachelle Hoffman	Jackson Controls	Jackson Controls Opp		9/30/2017	Perception Analysis	
Close Date (2)	Rachelle Hoffman	International Shipping Co.	International Shipping Co.		9/30/2017	Prospecting	
Close Month	Rachelle Hoffman	Highland Manufacturing Ltd.	Highland Manufacturing		9/30/2017	Prospecting	
Last Stage Change Date	, Rachele Hofman	Cadinal Inc.	Cadinal Inc		9/30/2017	Prospecting	
/ Next Step	Rachele Hoffman	Emerson Transport	Emerson Transport		9/30/2017	Prospecting	
11 and a	Grand Totals (12 rec	and the second					_

Figure 5-56. Sorting by a field in your reports

Note You can sort any report type like this.

Building a Summary Report

Follow these steps:

1. Once you are in the report builder, change the format to the Summary format, as shown in Figure 5-57.

unities with Products port Type: Opp Guided Tour | Video Tutorial | Help for this Pag Unsaved Report Save As Close Report Properties All a # 🗂 Filters Add 🔻 Fields Probability All Opportunity Status Open Show All opportunities 0 Q. ex Date Field Close Date ▼ Range Al Time ▼ From To To 6 Drag and drop to add fields to the report. Coportunity Information To add filters, click Add # Expected Revenue Product Information # Expected Product Amount Account Custom Info Tabular Format Show Remove All Columns SLA Expiration Date Preview Opportunity N 🖌 🛄 Tabular Туре Stage Expected Revenue + Amount Jackson Cont Summary Perception Analysis International Prospecting Matrix Highland Mar Prospecting Help me choose... Prospecting Cadinal Inc Emerson Transport Prospecting Dickenson Mobile Generators New Customer Grand Hotels Kitchen Generator Existing Customer - Upgrade Edge Emergency Generator Existing Customer - Replacement GenePoint Lab Generators \$1,500.00 Qualification \$15,000,00 Quantication \$9,000.00 Id. Decision Makers \$39,250.00 Id. Decision Makers \$33,250.00 Id. Decision Makers \$33,000.00 S72,000.00 \$72,000.00 \$15,000.00 \$35,000.00 GenePoint Lab Generators \$60,000.00 Proposition \$72,000.00 Perception Analysis \$84,000.00 Prospecting \$90,000.00 Proposal/Price Quote \$99,000.00 Negotiation/Review \$112,500.00 Value Process? Express Logistics Portable Truck Generators Existing Customer - Upgrade \$80,000.00 Existing Customer - Upgrade Express Logistics SLA \$120,000.00 Pyramid Emergency Generators -University of AZ Installations Existing Customer - Upgrade United Oil Office Portable Generators Existing Customer - Upgrade \$100,000.00 \$100,000.00 Existing Customer - Upgrade Negotiation/Review \$112,500.00 Value Proposition \$125,000.00 \$125,000.00 Grand Hotels Guest Portable Generators Existing Customer - Upgrade \$250,000.00 Value Proposition \$125,000.00 Proposal/Price Quote \$202,500.00 United Oil Refinery Generators Existing Customer - Upgrade \$270,000.00 \$270,000.00 United Oil Installations Existing Customer - Upgrade Negotiation/Review \$259,200.00 United Oil Plant Standby Generators Existing Customer - Upgrade Needs Analysis \$841,250.00 \$875,000.00 Grand Totals (18 moon

CHAPTER 5 LIGHTNING REPORTS AND DASHBOARDS

Figure 5-57. Changing your report format to the Summary report format

2. Add groupings to your report by dragging and dropping a field into the area "Drop a field here to create a grouping," as shown in Figure 5-58.

C Report Type: Opportunities wi Unsaved Report				Guided Tour Video T	utorial (Help for this
iave Save As Close	à Report Properties				
elds All a # 🗆	Filters Add •				
Long Land	Show All opportunities	Opportunity Status Open	Probability At	¥	
l.					
rag and drop to add fields to the report	Date Field Close Date V Rang	All Time V From	To To	6	
Formulas	 To add fitters, click Add. 				
Ja Add Formula					
Bucket Fields					
Add Bucket Field					
Opportunity Information					
a Created By	2 review Summary Format * Show	· Remove All Columns			
- @ Created Alias	Opportunity Name	Type	Stage	Expected Revenue 1	Amount
a Last Modified By		To the second	ounge	Expected neverage 1	Philippent
a Last Modified Alias	Drop a field here to create a grouping. Hi	de			
- @ Opportunity Name	Jackson Control o		Perception Analysis		
a Type	Internation Co.		Prospecting		
a Lead Source	Highla acturing	•	Prospecting		
g Primary Partner			Prospecting		
# Amount	Erson Transport		Prospecting		
# Opportunity Quantity	Dickenson Mobile Generators	New Customer	Qualification	\$1,500.00	
# Expected Revenue	Grand Hotels Kitchen Generator	Existing Customer - Upgrade	Id. Decision Makers	\$9,000.00	
# Closed	Edge Emergency Generator	Existing Customer - Replacement	Id. Decision Makers	\$33,250.00	\$35,000
# Won	GenePoint Lab Generators		Id. Decision Makers	\$38,000.00	
Close Date	Express Logistics Portable Truck Generators	Existing Customer - Upgrade	Value Proposition	\$72,000.00	
Close Date (2)	Express Logistics SLA	Existing Customer - Upgrade	Perception Analysis	\$84,000.00	
Close Month	Pyramid Emergency Generators	-	Prospecting	\$90,000.00	
- Last Stage Change Date	University of AZ Installations	Existing Customer - Upgrade	Proposal/Price Quote	\$99,000.00	\$100,000
- a Next Step	United Oil Office Portable Generators	Existing Customer - Upgrade	Negotiation/Review	\$112,500.00	\$125,000
- d Stage	Grand Hotels Guest Portable Generators	Existing Customer - Upgrade	Value Proposition	\$125,000.00	\$250,000
tt orađe	United Oil Refinery Generators	Existing Customer - Upgrade	Proposal/Price Quote	\$202,500.00	\$270,000
# Probability (%)	United Oil Rennery Generators				
	United Oil Netherly Generators United Oil Installations United Oil Plant Standby Generators	Existing Customer - Upgrade Existing Customer - Upgrade	Negotiation/Review	\$259,200.00	\$270,000

Figure 5-58. Dragging and dropping fields into the grouping section of the report

Note You can add up to three groupings here, and this feature is also available in the Matrix report format.

 Once you have grouped your report with fields, you can further define how these fields are grouped for date data type fields. For instance, if you grouped by the Close Date field, you can change the grouping to group by Calendar Month, as shown in Figure 5-59.

Present Type: Opportunities with Unsaved Report					Guided Tour Video 1	lutorial Help for this
Save Save As Close	Report Properties					
ields	Filters Add Show All opportunities	Opportunity St	atus Open	Probability All		
Q, close			From		- Line -	
Drag and drop to add fields to the report.	Date Field Close Date	Range All Time	From	To To	54	
Opportunity Information # Closed Close Date Close Date (2) Close Month	To add filters, click Add.					
3		Show Remove All Colu	umns			
	Opportunity Name	Туре		Stage	Expected Revenue 1	Amount
	Close Date: 5/20/2017 (1 Red	cord)				
	24 Sort Group By 🕨 ate	e a grouping. Hide				
		Existing Custom	er Upgrade	Id. Decision Makers	\$9,000.00	\$15,000
	Group Dates By	Day				
	Move Group Up	Calendar Week	- Upgrade	Value Proposition	\$72,000.00	\$80,000
		Calendar Month	Hannada	Benestian Anthonia	\$84,000.00	
	Move Group Down		- Upgrade	Perception Analysis	\$84,000.00	\$120,000
		Calendar Quarter	Upgrade	Procosal/Price Quote	\$99,000.00	\$100,000
	X Remove Group	Calendar Year	000000	Proposal Price accord		
	United Oil Installations	Fiscal Quarter	- Upgrade	Negotiation/Review	\$259,200.00	\$270,000
	Close Date: 6/29/2017 (1					
	United Oil Office Portable Gener	Fiscal Year	- Upgrade	Negotiation/Review	\$112,500.00	\$125,000
	Close Date: 7/7/2017 (1 R	Calendar Month in Year				
	Pyramid Emergency Generators	Calendar Day in Month	_	Prospecting	\$90,000.00	\$100,000
	Close Date: 7/11/2017 (1 I Dickenson Mobile Generators	No. Carlos		Qualification	\$1,500.00	\$15,000
	Close Date: 7/23/2017 (1 Rec	New Customer		Qualification	\$1,500.00	\$15,000
	United Oil Plant Standby Generators		er - Lloorade	Needs Analysis	\$841,250.00	\$675.000
	Close Date: 8/13/2017 (1 Rec	a contract of the second of the				
	United Oil Refinery Generators	Existing Custom	er - Upgrade	Proposal/Price Quote	\$202,500.00	\$270,000
	Close Date: 8/22/2017 (1 Rec					
	GenePoint Lab Generators			Id. Decision Makers	\$36,000.00	\$80,000
	Close Date: 8/28/2017 (1 Rec	oord)				
	Grand Hotels Guest Portable Gener	ators Existing Custom	er - Upgrade	Value Proposition	\$125,000.00	\$250,000
	Close Date: 9/3/2017 (1 Reco	ord)				
	Edge Emergency Generator	Existing Custom	er - Replacement	Id. Decision Makers	\$33,250.00	\$35,000

Figure 5-59. Defining how your report is grouped

4. Continue building your report by dragging and dropping fields into places of your choice. Save and name the report and run!

Building a Matrix Format Report

Follow these steps:

1. Once you are in the report builder, change the Tabular Format drop-down to Matrix, as shown in Figure 5-60.

Vinsaved Report					
Save As Close	Report Properties				
ields 🛛 All a # 📼	Filters Add •				
ciose 🙆	Show All opportunities	Opportunity Status Open	Probability All	•	
	Date Field Close Date V Rang	All Time V From	То	12	
rag and drop to add fields to the report.			[em]	1.18	
Closed	To add filters, click Add.				
Close Date					
Close Date (2)					
Close Month					
	Preview Summary Format * Show	Remove All Columns			
	Opportunity N Tabular	Туре	Stage	Expected Revenue 1	Amount
		1.11-			
	Matrix	ng. Hide			
		Existing Customer - Upgrade	Id. Decision Makers	\$9,000.00	
	919 (?) Help me choose	Existing Customer - Upgrade	Value Proposition	\$72,000.00	\$80,000
	Express Logistics OLM	Existing Customer - Upgrade	Perception Analysis	\$84,000.00	\$120,000
	University of AZ Installations Close Date: June 2017 (2 Records)	Existing Customer - Upgrade	Proposal/Price Quote	249,000.00	\$100,000
	United Oil Office Portable Generators	Existing Customer - Upgrade	Negotiation/Review	\$112.500.00	\$125.000
	United Oil Onice Portable Generators United Oil Installations	Existing Customer - Upgrade	Negotiation/Review	\$259,200.00	\$120,000
	Close Date: July 2017 (3 Records)	Existing Customer - Opgrade	rvegobasion/Review	\$259,200.00	5270.000
	Dickenson Mobile Generators	New Customer	Qualification	\$1,500.00	\$15.000
	Pyramid Emergency Generators	Contraction of the second s	Prospecting	\$90,000.00	\$100.000
	United Oil Plant Standby Generators	Existing Customer - Upgrade	Needs Analysis	\$841,250.00	\$875,000
	Close Date: August 2017 (3 Records)				
	GenePoint Lab Generators		Id. Decision Makers	\$36,000.00	\$60.000
	Grand Hotels Guest Portable Generators	Existing Customer - Upgrade	Value Proposition	\$125,000.00	\$250,000
	United Oil Refinery Generators	Existing Customer - Upgrade	Proposal/Price Quote	\$202,500.00	\$270,000
	Close Date: September 2017 (6 Record	is)			
	Jackson Controls Opp	1.0	Perception Analysis		
	International Shipping Co.	(.e.)	Prospecting		
	Highland Manufacturing	-	Prospecting		
	Cadinal Inc		Prospecting		
	Emerson Transport	-	Prospecting		
	Edge Emergency Generator	Existing Customer - Replacement	Id. Decision Makers	\$33,250,00	\$35,000

Figure 5-60. Switching your report format to a Matrix report format

2. Notice for this report type you have two areas for grouping: at the columns level and at the row level. Drag and drop the field of your choice onto either of these grouping areas. You can add two groups on the column grouping level and on the row grouping level, as shown in Figure 5-61.

Papert Type: Opportune Conserved Re	port					Guided Tour	Video Tutorial Help f	or this Page 🕤
Save As Clos	A Report Properties							
ields All a	8 D Filters Add							
the second	Show Al copp	tunties V Opportunity Status Open	V Probability Al	¥				
Q, Quick Find								
Drag and drop to add fields to th	e report. Date Field Close D	ate V Range All Time V From	To To	68				
Add Formulas J ² Add Formula Bucket Fields Add Bucket Field	To add fitters, click i	Add.						
Opportunity Information								
@ Created By	2 Matrix	Format * Show * Remove All Columns						
Greated Alias Greated Alias Greated Alias Last Modified By		Drop a field here to create a column grouping	Grand Total					
Last Modified Alias	Drop a field here to	Drop summarizable fields into the matrix.		Opportunity Name	Type	Stage	Expected Revenue	Amount
g Type	create a row grouping	Record Count	1	Jackson Controls Opp		Perception	•	
a Lead Source		Record Count		International Shipping Co.		Analysis Prospecting		
(J. Primary Partner		Record Count		Highland Manufacturing		Prospecting		2
# Amount		Record Count		Cadinal Inc		Prospecting		
# Opportunity Quantity # Expected Revenue		Record Count		United OI Plant Standby Generators	Existing Customer - Upgrade	Needs Analysis	\$641,250.00	\$675,000.0
# Closed		Record Count	,	Edge Emergency Generator	Existing Customer - Replacement	ld. Decision Makers	\$33,250.00	\$35,000.0
Close Date		Record Count	1	Dickenson Mobile Generators	New Customer	Qualification	\$1,500.00	\$15,000.0
Ciose Date (2)		Record Count	,	United OI Office Portable Generators	Existing Customer - Upgrade	Negotiation/Review	\$112,500.00	\$125,000.
Close Month	ata ¹	Record Count		Grand Hotels Kitchen Generator	Existing Customer - Upgrade	ld. Decision Makers	\$9,000.00	\$15,000.0
- d Next Step - d Stape		Record Count		United Oil Refinery Generators	Existing Customer - Upgrade	Proposal/Price Quote	\$202,500.00	\$270,000
# Probability (%)		Record Count		Grand Hotels Quest Portable Generators	Existing Customer - Upgrade	Value Proposition	\$125,000.00	\$250,000
# Fiscal Year		Record Count		Pyramid Emergency Generators	•	Prospecting	\$90,000.00	\$100,000.
# Age # Stage Duration		Record Count		Express Logistics Portable Truck Generators	Existing Customer - Upgrade	Value Proposition	\$72,000.00	\$80,000.0
Forecast Category Goportunity ID		Record Count		GenePoint Lab Generators		ld. Decision Makers	\$36,000.00	\$60,000.0
Last Activity		Record Count		United Oil Installations	Existing Customer - Upgrade	Negotiation/Review		\$270,000
# Has Products		Record Count		University of AZ Installations	Existing Customer - Upgrade Existing Customer -	Proposal/Price Quote Perception	599,000.00	\$100,000.
Created Date		Record Count		Express Logistics SLA	Existing Customer - Upgrade	Perception Analysis	504,000.00	5120,000.
Last Modified Date		Record Count	1	Emerson Transport		Prospecting		
# Private	and the second se	Record Count	18	and the second se				

Figure 5-61. Dragging and dropping the field into the grouping sections of the report

3. Continue building your report by dragging and dropping fields where you'd like. Save and name the report and run!

Summarizing Your Data

You can use the summarize feature on the number, currency, or percent field data types in the report builder. The summarize feature allows you to sum the data in a row, find the average of data in a row, find the minimum of the data in a row, or find the maximum of the data in a row. Use this feature in an opportunity report to find the average age of an opportunity or case. Or use this feature to simply give you the sum of your amount fields on opportunities. When you use this feature in a summary or matrix report, it will summarize on all grouping levels and give you the grand total.

1. Once in your report builder, click the down-facing arrow next to the field you want to summarize, as shown in Figure 5-62.



Figure 5-62. Summarizing a field

2. Choose to sum, find the average, find the max, or find the min and click Apply, as shown in Figure 5-63.

Opportunity Name	Туре	Am	ount	Probabil	ty (%)	Expected R	evenue
Close Date: Q2 CY2017 (6 Records)							
Stage: Value Proposition (1 Record)							
Drop a field here to create a gro	uping. Hide						
Express Logistics Portable Truck Generators	Existing Customer - Upgrade		\$80,000.0	0	90%		\$72,000.00
Stage: Id. Decision Makers (1 Recor	d)						
Grand Hotels Kitchen Generator	Summarize						\$9,000.00
Stage: Perception Analysis (1 Recor	Summarize					×	
Express Logistics SLA						2	\$84,000.00
Stage: Proposal/Price Quote (1 Reco		Sum	Average	Max	Min	~ /	
University of AZ Installations	Amount					-	\$99,000.00
Stage: Negotiation/Review (2 Record							
United Oil Office Portable Generators							\$112,500.00
United Oil Installations	Ap	ply	Cancel				\$259,200.00
Close Date: Q3 CY2017 (12 Records)							
Stage: Prospecting (5 Records)							
International Shipping Co.	•			-	1096		-
Highland Manufacturing	-			-	9696		-
Cadinal Inc	8			-	95%		-
Pyramid Emergency Generators			\$100,000.0	0	90%		\$90,000.00

Figure 5-63. Choosing how you want to summarize a field

3. Don't forget to save and run your report.

Adding Formulas to Reports

You can add formulas to your reports to calculate the currency, number, or percent fields from an object. The formula feature allows you to leverage your field formats, summarize field data, use basic operators, use complex functions, and use logic statements.

The operators for formulas include addition, subtraction, multiplication, division, and exponentiation. The functions available include logical statements, mathematical statements, or summary statements.

1. In the left pane, drag Add Formula into the report and place it in a column position of your choice, as shown in Figure 5-64.



Figure 5-64. Adding a formula field to your report

- 2. Name your formula.
- 3. Add a description.
- 4. Adjust the format or decimal place if necessary.
- 5. Choose what level to run this formula on.

6. Create your formula using the operators or functions necessary.

Note Formulas are for the advanced user. We will not be covering the various aspects of what formulas to use in this book. However, Salesforce offers free support, and there are great forums that can offer help as well.

- 7. Click Check Syntax for complex formulas to ensure there are no errors.
 - **Custom Summary Formula** Help for this Page 🥑 🗙 Column Name: Stage Allocation Description: Format: Number Decimal Places: 2 • mula be display This formula calculation will be displayed in the report at the level you select. All summary levels Decis Grand summary only Grouping 1: Close Date (by Calendar Quarter) 1 Ger Grouping 2: Stage rceptio posal ABS All ٠ PREVGROUPVAL(AMOUNT:SUM, STAGE_NAME) ABS(number) 6 Returns the absolute value of a number, a number without its sign 0.00 rtable C < Insert Help on this function ng Co ing Cancel 0.00 y Gene 10% ation (1 Record)
- 8. Click OK to add the formula, as shown in Figure 5-65.

Figure 5-65. Creating a formula field on your report

9. The formula field appears as a column on the report, as shown in Figure 5-66.

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Propert Type: Opportunities with Unsaved Report	h Products					Guided
Save Save As Close	& Report Properties					
	1					
Fields All a # 🖸	Filters Add •					
Q. Quick Find	Show All opportunities	Opportunity Status Open	 Probability AI 	*		
	Date Field Close Date V R	nge Al Time Y From	To To	6		
Drag and drop to add fields to the report.	Land Land		[car]	[cm]		
Formulas J ⁱ Add Formula J ⁱ Stage Allocation Bucket Fields	To add filters, click Add.					8
Add Bucket Field	Preview Summary Format * Sho	· · Remove All Columns				
4 Created By	Opportunity Name	Type	Amount	Probability (%)	Expected Revenue	fr Stage Allocation
g Created Alias			Amount	From a music (m)	Expected Revenue	Ji sage knotation
g Last Modified By	Close Date: Q2 CY2017 (6 Records)	1				
a Last Modified Alias			\$710,000.00			
g Opportunity Name	Stage: Value Proposition (1 Reco	rd)				
а Туре			\$80,000.00			
/ Lead Source	Drop a field here to create a	rouping. Hide				
a Primary Partner	Express Logistics Portable Truck Generator	Existing Customer - Upgrade	\$80,000.00	90%	\$72,000.00	
# Amount	Stage: Id. Decision Makers (1 Re	cord)				
# Opportunity Quantity			\$15,000.00			80,000.
# Expected Revenue	Grand Hotels Kitchen Generator	Existing Customer - Upgrade	\$15,000.00	60%	\$9,000.00	
# Closed	Stage: Perception Analysis (1 Re	cord)				
# Won			\$120,000.00			15,000
Close Date	Express Logistics SLA	Existing Customer - Upgrade	\$120,000.00	70%	\$84,000.00	
Close Date (2)	, Stage: Proposal/Price Quote (1 R	ecoraj	\$100,000.00			120,000
Last Stage Change Date	University of AZ Installations	Existing Customer - Upgrade	\$100,000.00	90%	\$99.000.00	
g Next Step	Stage: Negotiation/Review (2 Rev		\$100,000.00		389,000.00	
d Stape	stage. regetater terren (z ree		\$395,000.00			100,000.
# Probability (%)	United OI Office Portable Generators	Existing Customer - Upgrade	\$125,000,00	90%	\$112,500.00	
Fiscal Period	United Oil Installations	Existing Customer - Upgrade	\$270,000.00	90%		
# Fiscal Year	Close Date: Q3 CY2017 (12 Records					
# Age			\$1,405,000.00			
# State Duration	Stage: Prospecting (5 Records)					

Figure 5-66. The formula field appears as a column in your report

Exporting Reports

You can export the data from any report you create in Salesforce to a spreadsheet. This allows you to take it into Excel for further analysis. Salesforce offers two types of exportable formats: the Excel format .xls and the comma-delimited .csv. XLS is compatible with Excel and most spreadsheet software. CSV is compatible with a wider range of software programs and comes with limited formatting.

1. Open your desired report; in the right corner click the downfacing arrow next to the word *Edit* and select Export, as shown in Figure 5-67.

Total Records 18	Total Amount \$2,115,000.00							Cione Save	
	STAGE †	OPPORTUNITY NAME	TYPE	AMOUNT Sum	PROBABILITY (%)	EXPECTED REVENUE	STAGE ALLOCATIO	Subscribe Export	h
Q2 CY2017 (6 records)	Value Proposition (1 record)	Express Logistics Portable Truck Generators	Existing Customer - Upgrade	\$80,000.00	9096	\$72,000.00		Delete	Exp
	Subtotal			\$80,000.00					
	Id. Decision Makers (1 record)	Grand Hotels Kitchen Generator	Existing Customer - Upgrade	\$15,000.00	60%	\$9,000.00			
	Subtotal			\$15,000.00			80,000.00	5	
	Perception Analysis (1 record)	Express Logistics SLA	Existing Customer - Upgrade	\$120,000.00	7096	\$84,000.00			
	Subtotal			\$120,000.00			15,000.00)	
	Proposal/Price Quote (1 record)	University of AZ Installations	Existing Customer - Upgrade	\$100,000.00	99%	\$99,000.00			
	Subtotal			\$100,000.00			120,000.00	5	

Figure 5-67. Exporting a report

2. Choose the format that supports your company software and select Export, as shown in Figure 5-68.

		×
gistics SI	Export	
of AZ Ins	Encoding ISO-8859-1 (General US & Western European, ISO-LATIN-1)	
Office Pr	Format	
Installat	Excel Format .xls	2
nal Shipp	Cancel	rt -
Aanufacturing	g - 96%	

Figure 5-68. Selecting the export format and exporting the data

Creating Report Charts

You can create report charts for your reports in Salesforce. Report charts allow you to see your data in a graphical format for easy and quick review of your data. Reports and report charts have a one-to-one ratio: only one chart can be used in one report. Should you want to see several variations of your report, you can clone your report or, better yet, put them in a dashboard (shown in Figure 5-79). Report charts can be used only in Summary or Matrix format reports. You can create horizontal and vertical bar charts, stacked horizontal and vertical bar charts, line charts, donut charts, funnel chart, and scatter charts.

1. Go to your Reports tab and select the report of your choice, as shown in Figure 5-69.

Cloud Cr	eations Home Leads 🗸	Accounts V Contacts V Opportunities V Re	iports 🗸	Dashboards V			
REPORTS Recent 8 Items						New Report	New Folder
REPORTS	REPORT NAME	DESCRIPTION		FOLDER	LAST MODIFIED BY	SUBSCRIBED	
Recent	Cloud Creations Opportunity by	-		Private Reports	Rachelle Hoffman		•
Created by Me	Opp Pipeline			Public Reports	Rachelle Hoffman		
Private Reports	Cloud Creations Opps by Type	\mathbf{i}		Public Reports	Rachelle Hoffman		٣
Public Reports	Business's and their industries			Private Reports	Rachelle Hoffman		٣
All Reports	Leads Converted and Lead Sour	•		Public Reports	Rachelle Hoffman		٣
FOLDERS	Leads grouped by Status and Cri	have a second		Public Reports	Rachelle Hoffman		٣
Created by Me	Cloud Creations Opps by Type a			Private Reports	Rachelle Hoffman		٠
Shared with Me	Cloud Creations Contact List			Private Reports	Rachelle Hoffman		*

Figure 5-69. Retrieving a report

2. Click the chart symbol next to the filter symbol, as shown in Figure 5-70.

REPORT					2		
Opp	Pipeline					• • • •	Edit
Total Records	Total Amount \$1,955,000.00						
STAGE †	PROBABILITY (%) 1	OPPORTUNITY OWNER	ACCOUNT NAME	OPPORTUNITY NAME	TYPE	AMOUNT Sum	
Qualification 1 record)	10%6 (1 record)	Rachelle Hoffman	Dickenson plc	Dickenson Mobile Generators	New Customer	\$15,000.00	
	Subtotal					\$15,000.00	
ubtotal						\$15,000.00	
leeds Analysis	95% (1 record)	Rachelle Hoffman	United OII & Gas Corp.	United OII Plant Standby Generators	Existing Customer + Upgrade	\$675,000.00	
1 record)	12						

Figure 5-70. Clicking the chart icon

3. Based on your report and how your data is put together, Salesforce will display a recommended report. You can change this if needed; click the settings cog icon, as shown in Figure 5-71.

Cloud	Creations Hom	e Leads 🗸 Accounts	✓ Contacts ✓ Op	portunities 🗸 Reports 🗸 Dashi	boards 🗸	
Opp	Pipeline					C 🕈 C 🌣 Edit
Total Records	Total Amount \$1,955,000.00					3
				Sum of Amount		Probability (%)
	0	100w	200x	300x 400x	500w	600x 10%
	iffcation 10%					9596
	Analysis 95%					675× 50%
Value Pro	oposition 50%		2504			90%
5	90%	BOK				7096
II Id. Decision	n Makers 60% 15k 95% 35k					7596
2						9996 📒 9696 🔳
<u>8</u>	Analysis 70%	120x				
R Proposal/Pri	ce Quote 75%	100x	270к			
	n/Review 90%6	1254				
rwgotiation	9696		270x			
TAGE †	PROBABILITY (%) †	OPPORTUNITY OWNER	ACCOUNT NAME	OPPORTUNITY NAME	TYPE	AMOUNT Sum
ualification (record)	10%6 (1 record)	Rachelle Hoffman	Dickenson pic	Dickenson Mobile Generators	New Customer	\$15,000.00
	0.0000					

Figure 5-71. Selecting the Setup icon for the chart

4. Change the Display As section to reflect the type of report chart you would like to see, as shown in Figure 5-72.

Opp F	Pipeline					C 🕈 C 🏶 Edit 🗸
	Total Amount \$1,955,000.00					
(%) (%) (%) (%) (%) (%) (%) (%) (%) (%)	Ifcation 1046 15x Analysis 9546 15x Makars 6046 15x Makars 6046 15x Analysis 7046 15x Makers 5046 15x Parkers 7546 15x 9946 9946 15x	2004 2004 2006 2006 2006	Sum of Amount 400x 270x	600x 675x	Probability (%) 10% 95% 90% 90% 60% 70% 99% 99% 96% 96%	A Display As Display As Dis
TAGE †	PROBABILITY (%) †	OPPORTUNITY OWNER	ACCOUNT NAME	OPPORTUNITY NAME	TYPE	X-Axis
ualification Lirecord)	1096 (1 record)	Rachelle Hoffman	Dickenson pic	Dickenson Mobile Generators	New Customer	Sum of Amount
	Subtotal					Add
ubtotal						
leeds Analysis 1 record)	9596 (1 record)	Rachelle Hoffman	United OII & Gas Corp.	United OII Plant Standby Generators	Existing Customer - Up	Group
	Subtotal					Group
ubtotal						
talue Proposition 2 records)	50%6 (1 record)	Rachelle Hoffman	Grand Hotels & Resorts Ltd	Grand Hotels Guest Portable Generators	Existing Customer - Up	Probability (%)
	Subtotal					
	90%6 (1 record)	Rachelle Hoffman	Express Logistics and Transport	Express Logistics Portable Truck Generators	Existing Customer - Up	Legend Position

Figure 5-72. Choosing the type of chart

5. Adjust the chart attributes within the chart editor; add a chart title, change the *x*-axis to another field, add items like a dimension or second axis, choose to show the values on the report chart or not, and choose if a legend should appear on the right or bottom of the chart, as shown in Figure 5-73.



Figure 5-73. Customizing your report chart attributes

Note Some features are available only on specific report charts.

After you have configured your report chart, don't forget to save your work and see your results, as in Figure 5-74.



Figure 5-74. Finishing result of a report chart

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Understanding Dashboards

Dashboards are visual representations of the reports you have already created. Dashboards can represent multiple dashboard components (individual charts and graphs). You can display one report in multiple dashboard components; you can't display multiple reports into one dashboard component. For example, if you have one report that represents your sales by each user, you can display this one report in two dashboard components, such as a pie chart and bar chart. You can create horizontal and vertical bar charts, stacked horizontal and vertical bar charts, line charts, donut charts, funnel charts, metric charts, gauge charts, table charts, and scatter charts.

Creating a Dashboard, Adding Dashboard Components, and Modifying Your Dashboard

Follow these steps:

1. Click your Dashboards tab and click New Dashboard, as shown in Figure 5-75.

Cloud Creat	ions Home Leads v A	ccounts 🗸 Contacts 🖌 Opportuni	ities 🗸 Reports 🗸 Dashboards 🗸	
DASHBOARDS Recent 0 Items				New Dashboard New Folder
DASHBOARDS	DASHBOARD NAME	DESCRIPTION	FOLDER	LAST MODEFIED BY
Recent				
Created by Me				
Private Dashboards				

Figure 5-75. Creating a new dashboard

- 2. Name your dashboard.
- 3. Add a description.
- 4. Choose whether your dashboard is a public or private dashboard.

5. Click Create, as shown in Figure 5-76.



Figure 5-76. Naming and creating your dashboard

6. Click Component in the upper-right corner to add a report you've already created to the dashboard, as shown in Figure 5-77.

ud Creations Sales Dashboard 🌶	6 + Comp	overt + Tiller 5 C @ Save • D

Figure 5-77. Adding a new report and chart component to your dashboard

7. Search the report you want to add to the dashboard, as shown in Figure 5-78.



Figure 5-78. Finding the report for your dashboard component

8. Choose the chart you want to display your data in and modify any attributes to better display your data. Once finished, click Add, as shown in Figure 5-79.

Preview Preview Cloud Creations Opportunity TX Display As Cloud Creations Opportunity Type Sum of Total Price Add Dimension Close Date Close Date Close Construction Preview Cloud Creations Opportunity Type Sum of Total Price Close Date Close Date Close Date Close Date Close Construction Close		Add Component
Type Type Acxis Sum of Total Price Add Dimension Close Date	Cloud Creations Opportunity TX	Cloud Creations Opportunity Type Sum of Total Price Solve 3M Existin Januar 2400. Febru 9958. Mark 2017 Febru
Add 8 Dimension V Dimension Close Date V	Type X-Axis	March 1.1м Аргіі 2 75к
Close Date 💌	and the second se	

Figure 5-79. Creating the chart to go with your report on your dashboard

Note As you make changes to these attributes, watch the preview of the report to see how these changes affect the display.

9. Click the dashboard report and drag the corners out to make your report bigger, or click the dashboard and move the report to another location on the dashboard, as shown in Figure 5-80.

	Q, Search Satestorce	😥 - 🖬 ? 🌣 🐥 🔁
Cloud Creations Home Chatter Leads V Accounts V Co	ntacts v Cases v Opportunities v Beports v Daunosants v	
loud Creations Sales Dashboard 🖌		+ Add 5 (* @ Save + Dan
Cloud Creations Opportunity Type	9	

Figure 5-80. Modifying the size of your report and chart

- 10. Continue steps 6 to 9 until you are satisfied with your dashboard.
- 11. Click Save when you complete or to save your work, as shown in Figure 5-81.



Figure 5-81. Saving your dashboard

Using Dynamic Dashboards

Dynamic dashboards allow each user to see the data that they have access to based on their security and sharing settings. This allows you to create one dashboard that every user can have access to. After you have created your dashboard, you can access the properties and make this modification or use the other two accesses for users. You can set a dashboard to be viewed as Me, which allows dashboard readers to see data in the dashboard according to your access to the data. You can select the option "A specified user," which allows users to see data based on the selected user's access. Lastly, you can use the "The logged in user," which allows users to see data based on their access. Additionally, you can prevent users from changing how the dashboard is viewed by deselecting "Allow Dashboard views to change this (dynamic dashboard)." Businesses choose a dynamic dashboard over a nondynamic one when they are trying to prevent users from seeing data that they shouldn't. For instance, a business may have many sales users. With these sales users, there are many territories. If you don't want the salesperson responsible for California to see the sales data for New York, you could use the option "The logged in user." (Granted, you must have set up your security to prevent this from happening, which is covered in Chapter 9.) If having the user's data restricted is not an issue for your company, you can leave the settings as is. Let's take a look at how you can modify this:

1. Click the settings cog icon in the right corner of the dashboard, as shown in Figure 5-82.



Figure 5-82. Creating a dynamic dashboard

- 2. Select what view you would like to set the dashboard as.
- 3. Select or deselect if the user should be able to change this.

4. Click Save, as shown in Figure 5-83.



Figure 5-83. Selecting the view of the dashboard

Summary

One of the greatest benefits of having Salesforce as your client relationship management tool is the reports that can be generated from the data collected. Being able to calculate your return on investment (ROI) or how your sales team is doing will help you in the months and years of your business to come. The best thing about reports and dashboards is that you can't mess your data up using them. Don't be afraid to click around and play with them. You are only translating data; you can't mess it up!

CHAPTER 6

Collaborating

Salesforce offers many collaboration tools. One valuable collaboration tool offered is called Chatter. This tool and its capabilities can be found on a significant number of standard objects and all custom objects in Salesforce. It allows your users to communicate with each other via internal messaging. You can even allow your users to share files such as Word and PowerPoint files with each other and your customers using content deliveries. Do you need to share your Salesforce records with another Salesforce organization? You can use Lightning Connect and sync data to the other Salesforce organization. You can enable *topics*, which allow your users to interact on specific topics with each other. We can't forget about the Salesforce mobile app, Salesforce, that allows your users to be on-the-go for iPhone and Android users. Figure 6-1 shows the Chatter object.

What I Follow To Me Bookmarked	Post Poll Question		
Company Highlights	Share an update		Share
STREAMS +	Top Posts 🔻	Q. Search this feed	C
ECENT GROUPS +	Rachelle Hoffman 17m ago		¥
v, you don't have any	@Jessica Day Hi Welcome to Chatter! Use the '@' syn	nbol to direct a message to other Salesforce users!	
oups! Why not create or in some now?	🔥 Like 🌘 Comment 🖄 Share	1 com	iment · Seen by 1
	Jessica Day @Rachelle Hoffman Thanks for the tip! What Like + Just Now	else can I do with Chatter?	*

Figure 6-1. Chatter tool

Understanding Chatter

Salesforce Chatter is an essential tool that can be used to help you collaborate internally with co-workers and externally with clients. You can use the Chatter feature post, which allows you to post messages to other users or post messages on a record itself about that record. Give your employees the ability to post a question that needs an answer to your management team. Or collect information from your employees via an anonymous poll. Chatter has a number of great built-in tools that can be used in various ways. Let's look into some of these tools further.

Sidebar

The sidebar on the Chatter tab gives you quick access to Chatter features (Figure 6-2). Use the What I Follow link to quickly see all Chatter posts corresponding to all the records that users follow in Salesforce (more on this feature in a bit). Use the To Me link to see any post that a user directed at you using the @ symbol or any post that was left on your profile from another user. Use Bookmarked to see any post you have bookmarked. The Company Highlights quick-access link uses Einstein's artificial intelligence (AI) to bring you all the trending topics in your organization. The Streams quick-access link allows you to create quick-access links to records. Use this section to see all accounts, cases, contacts, and more that you follow. Recent Groups allows you to create and see the latest groups you have followed.



Figure 6-2. Chatter sidebar

Following in Chatter

Following is a powerful tool available in Salesforce. You can follow anything from people to groups to records. Following allows you to see all the relevant content and interactions that have happened to the record you choose to follow. Following in Chatter is comparable to following someone on Twitter. Want to see everything your training instructor is posting on Salesforce? Go to their profile and click the + Follow button. If you have a stream set up for that object, you can choose to add this record to the stream or to just use What I Follow. If you are viewing your Chatter feed, hover over the name of another user and use the Follow button here. Find the Follow button at the top of any record, as shown in Figure 6-3. Following brings the content and posts into your Chatter feed and allows you to interact right from your feed.

CI	oud Creations	Chatter Groups 🗸	People 🗸 Accounts 🗸	Contacts 🗸 Cases 🗸 Opportunities 🗸	🖌 Leads 🗸 Reports 🗸 More 🔻
	OUNT Orce			+ Follow Nev	v Contact New Case New Note 🔻
Туре	Phone (415) 901-7000	Website www.sforce.com	Account Owner Rachelle Hoffman £	Ac IN STREAM	
RELAT	ED DETAILS	NEWS		IN FEED + What I Follow	CHATTER
				New Stream	Log a Call New Event Email

Figure 6-3. Following in Chatter

Bookmarking a Post

You can bookmark a post just like you would bookmark a web site. If you want to save this post for later use and have it appear in your Bookmarked quick-access list in Chatter, all you'll need to do is click the down-facing arrow to the right of the post and click Bookmark (Figure 6-4). Notice that a yellow triangle with a star appears next to the arrow. Remove the bookmark the same way except choose Remove Bookmark in the drop-down.

CHAPTER 6 COLLABORATING



Figure 6-4. Bookmarking a post

Creating a Stream

Streams allow you to create groupings of specific records that you may want to follow (Figure 6-5). Streams in Chatter are best used when you want to create a custom feed that groups records from various objects into one feed. For example, if you have a new marketing campaign and you want to create a feed that follows records affected by the marketing campaign, you can create a stream that shows you all the Chatter posts on these various objects. To create a new stream, click the plus sign found in your Chatter sidebar next to Streams. First, you will need to name the stream. Next, choose what objects and records you want to include in this stream by first choosing the object and then using the search bar to search a specific record. Streams allow you to see records from the following standard objects, plus all custom objects: Accounts, Cases, Contacts, Files, Groups, Leads, Opportunities, People, and Topics. If you are viewing a record and want to include the individual record to a stream, use the + Follow button and select the stream.

New Stream	
Create your own flow of feed posts from records, people, and group:	s you choose.
Stream Name	
Accounts I follow	
Records to Follow	
Search Accounts	
Notify Me	
Every Post	
O Never	

Figure 6-5. Creating a new stream

Creating Groups

Chatter user groups in Salesforce provide a central location for users within that group to collaborate (Figure 6-6). Most organizations will create groups for their departments. You can make a group public, private, or unlisted. Public group feeds are seen by customers or Chatter-free users (more on this feature in a bit). Private groups are member-only groups and require a user to request to join and get approved prior to interacting with the group. Unlisted groups provide more privacy than private. Unlisted groups don't allow users to request to join; it is by invitation only. Additionally, unlisted groups don't show up in list views, feeds, profiles, or anywhere unless you are a member of that group or have the permission to modify unlisted groups (even users with Modify All Data can't see these if they aren't members). To create a group, click the plus sign next to Groups on the Chatter sidebar. Next, you'll need to name the group. You can add a description for the group, add information about the group, choose who manages the group in the owner field, determine the access type (public, private, or unlisted), select if customers should be considered for joining the group, select Broadcast Only if you want the posts to only come from managers or owners of the group, and click the Save & Next button. On the next page, upload a group photo for your group.

CHAPTER 6 COLLABORATING

Name												
Customer Qu	estions											
Description												
Use this grou	p to ask a	ny ques	tion you	have.								
formation												
Salesforce Sa	ns	v	14	w	в	I	Ľ	÷	=	15	+ 2	•]#
	0 1											
Cloud Creatio import, integr small-and-me	ation, do	cument	ation, re	eports, a	ind tra	aining	g. Ou					data
import, integr small-and-me roup Email	ation, do	cument	ation, re	eports, a	ind tra	aining	g. Ou					data
import, integr	ation, do dium siz	cument	ation, re	eports, a	ind tra	aining	g. Ou					data
import, integr small-and-me roup Email	ation, do dium size	cument ed busi	ation, re	eports, a	ind tra	aining	g. Ou					data ×
import, integr small-and-me roup Email • Owner Rachelle I	ation, do dium size	cument ed busi	ation, re	eports, a	ind tra	aining	g. Ou					data
import, integr small-and-me roup Email • Owner Rachelle Disable automa	ation, do dium size	cument ed busi	ation, re	eports, a	ind tra	aining	g. Ou					data ×
Import, integr small-and-me roup Email • Owner Disable automa • Access Type	ation, do dium size Hoffman tic archivi	cument ed busi	ation, re	eports, a	ind tra	aining	g. Ou					data ×

Figure 6-6. Creating a Chatter group

Chatter Feed

Access your Chatter feed by navigating to the Chatter tab or by going to your profile found in the upper-right corner of the screen and clicking your name (Figure 6-7).



Figure 6-7. Navigating to Chatter

Your Chatter feed contains all the items you follow, posts directed at you using the @ symbol, or posts that you have created. In your Chatter feed, you can control what you see by using the sidebar.

Creating Posts on Your Feed

To create a post, make sure you are on the Post tab of Chatter (Figure 6-8). You can start typing in the box provided and use any of the stylings it provides, such as the bolding, italicizing, underlying, strikethrough to your text, and bullet points or numbering. You can also add images, tag other groups or users, and attach files. Once your post is complete, click Share. Make a mistake on your post? Not a problem, use the downward-facing arrow (the same as the one used to bookmark) and click Edit or Delete.



Figure 6-8. Creating a post on your feed

After you have shared your post, watch other users like, comment, and share your post (Figure 6-9).

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Figure 6-9. Other users commenting and liking your post

Creating a Post on a Record's Feed

First, you'll have to search for or find the record you want to write your post on. Next, you'll click the word Chatter that appears on the right when you are on the Related tab of that record. Once you have clicked Chatter, you can start typing in the box provided and use any of the stylings it provides, such as the bolding, italicizing, underlying, strikethrough to your text, or bullet point or numbering. You can also add images, tag other groups or users, and attach files, as shown in Figure 6-10. Once your post is complete, click Share. You can also use the Poll and Questions options (covered later in the chapter).


Figure 6-10. Creating a Chatter post on record

Creating Topics in Your Post

You can use hashtags just like on Twitter and Instagram to create trending topics in Salesforce. Just add the # symbol in front of any word (with no space) in comments or in posts. For example, use #learning (Figure 6-11).



Figure 6-11. Using hashtags to create topics

Creating Chatter Polls

Create Chatter polls on your feed or on a group feed with up to ten possible choices, as shown in Figure 6-12. Watch the other Chatter users vote on their choice. Salesforce will count the votes and display the results. The user voting will not see who voted for what choice and will not see the results of the Chatter poll until they submit their vote. Keeping reading to learn how to create a Chatter poll.

Post Poll	Question		
To My Follower			
Question			
Isn't Salesforce	fun?		
Choice 1			
Yes			
Choice 2			
No			
Choice 3			
Yes, can't wait to	learn more!		
+ Add new cho	ce	Ask	

Figure 6-12. Chatter poll

To create a Chatter poll, follow these steps:

1. Navigate to the Chatter object or create a poll from within a record by navigating to the Chatter tab. Click the Poll tab found within the Chatter section of the record.
Figure 6-13 shows how to access this from a record, and
Figure 6-14 shows how to access this from the Chatter object.

sForce			✓ Follow	ing New Contac	t New Case	New Note	•
Account Site	Billing Address The Landmark @ One Market, San Francisco, CA 94087 US	Industry	Phone (415) 901-7000	Rating			
RELATED	DETAILS NEWS			ACTIVITY	CHATTER		
X We fo	und no potential duplicates of t	his account.		Post	Poll Que	estion	
No duplicate duplicate rec	rules are activated. Activate duplicate n ords.	ules to identify pote	ential	To this accour Question	it		
🖪 Conta	cts (2)		New		you like to ask?		
Jake Li Title: Email: Phone:				Choice 1 Choice 2			
Siddan Title: Email: Phone:	tha Nedaerk			+ Add new ch	oice	Ask]
			View All				

Figure 6-13. Accessing a Chatter poll from a record

Cloud Crea	tic	Chatter Group People V Accounts V Contacts V Cases V
Follow		Post <u>Poll</u> Question
arked		To My Followers
ny Highlights		Question
5 ts I follow	+	What would you like to ask?
		Choice 1
GROUPS er Questions	+	
		Choice 2
		+ Add new choice Ask
		Top Posts 🔻 Q Search this feed C

Figure 6-14. Accessing a Chatter poll from the Chatter object

- 3. Enter the poll question you have in mind for your Chatter users.
- 4. Enter the choices your Chatter users have for the poll.
- 5. If you need more choices, click the "Add new choice" link.
- 6. Once finished with your choices, click Ask, as shown in Figure 6-15.

ations	Chatter Gro	ups 🗸 People 🗸 Accounts 🗸 Contacts 🗸 Cases 🗸 Op
	Post Poll	Question
	To My Follow Question	vers 3
+	Based on the better?	e following choices what would help you to understand Salesforce
+	Choice 1	
	Walk-throug	h videos
4	Choice 2	
	Real life scer	harios
	Choice 3	
	One-on-One	
5	Add new c	hoice Ask

Figure 6-15. Creating a Chatter poll

7. Once you have posted your poll, you can click the "View results" link to see your results, as shown in Figure 6-16.



Figure 6-16. Viewing the results of a Chatter poll

Creating Chatter Questions

You can use Chatter questions to ask questions that may be beneficial to other users or that other users may have the answer to, as shown in Figure 6-17. Make sure you are on the Question tab of your Chatter feed and post your question. Sit and wait for other users to answer your post. Once you have found the best answer, click the Select as Best link next to the Like link in the comment posted and watch it move to the top of your post under your question for other users to see.



Figure 6-17. Creating a Chatter question

Chatter Notifications

Chatter notifications can come in many forms. You can see immediately when someone directs a post at you by the bell icon in the upper-right corner of your browser, as shown in Figure 6-18. You can click the bell icon and see what the latest post to you is or what the comment left is. From here, you can click the "Mark all as read" link to clear your Notifications window, or you can click the comment itself to be taken to the post in Chatter.



Figure 6-18. Receiving Chatter notifications

You can also choose to receive daily, weekly, and instantaneous email notifications. If you are a Salesforce mobile (iPhone or Android) user, you can enable notifications to be delivered to your mobile phone, as shown in Figure 6-19.



Figure 6-19. Chatter notifications

Enabling Chatter Email Notifications

You can enable Chatter email notifications for all your users by following these steps:

1. Go to settings cog icon in the upper-right corner and choose Setup from the drop-down, as shown in Figure 6-20.



Figure 6-20. Navigating to the Setup menu

2. In the Quick Find box, type **Email Setting** and click Email Settings found under Chatter, as shown in Figure 6-21.



Figure 6-21. Clicking Email Settings

- 3. Select the email setting of your choice, as shown in Figure 6-22.
 - Allow Emails turns on Chatter email notifications for users.
 - Allow Email Replies turns on the ability for your users to reply from within their email to Chatter notifications.
 - Allow Posts via Email allows your users to post to groups using their email.
 - Allow Attachments via Email gives the ability for your users to use attachments in their replies and post from email.

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• "Show Salesforce mobile app download badges" adds badges for downloading the Salesforce mobile app to all Chatter email notifications in your organization.



Figure 6-22. General email settings

Note Badges in Salesforce are an internal Chatter recognition technique that users can earn and give. This helps with user adoption by allowing users to give recognition with a Thanks badge. The Thanks badge shows up on the user's profile for everyone to see.

4. Click Save.

User's Configuration for Chatter Notifications

The previous settings will allow your users to use Chatter. Now we'll cover how your users can choose to receive the Chatter notifications.

1. Click your profile picture at the top-right corner of the web browser and click Settings, as shown in Figure 6-23.



Figure 6-23. Accessing your profile

- 2. In the Quick Find area, type in **Email Notifications** and select Email Notifications under Chatter.
- 3. Select the options that best fit your needs.
 - In the General section, you must select "Receive emails" to receive Chatter emails, as shown in Figure 6-24.

Chatter Email Settings	3
Chatter can email you when someone fol comments from your personal feed and g	
	Save
General	
Receive emails	V i

Figure 6-24. Turning "Receive emails" on

- In the Personal section, for "Email me when Someone," we recommend the following be selected because your users can become overwhelmed by too many email notices if all of them are selected:
 - *Posts on my profile*: This option will keep you up-to-date on any post that is made on your profile.
 - *Comments on a post on my profile*: This option will notify you on any comment that was left on your post.
 - *Comments on an item I bookmarked*: This will keep you current with any bookmark post so you know the latest.
 - *Mentions me in a post*: This will let you know any time a user uses the @ symbol and directs a post to you or mentions you in a post.
 - *Mentions me in a comment*: This will let you know any time a user uses the @ symbol and directs a comment or mentions you in a comment.

Follows	
Follows me	
Posts or Likes	
Posts on my profile	1
Shares a post I made	•
Likes a post or a comment I made	•
Comments	
Comments on my posts	1
Comments on a post on my profile	•
Comments after me	
Comments on an item I bookmarked	•
Comments on an item I like	•
Mentions, Messages, or Endorsements	
Mentions me in a post	1
Mentions me in a comment	
Sends me a message	•
Endorses me on a topic	•

Figure 6-25. Configuring what Chatter email you receive

4. Select the frequency of your personal digest. Your personal digest is a summary of the recent activity in Chatter that appears on your own feed. You can choose to receive this daily, weekly, or never, as shown in Figure 6-26.

Daily	۲
Weekly	0
Never	õ
	Ŭ.,

Figure 6-26. Selecting to receive emails daily, weekly, or never

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 You can also set how often you receive group Chatter notifications. We suggest that you select Limited for new groups; you can change your setting for each individual group should you want more frequency, as shown in Figure 6-27.



Figure 6-27. Selecting what to receive from Chatter

 You can select how often you receive group customer questions as well, as shown in Figure 6-28. We suggest Limited as well here. If you choose another option, you may get more emails than you want, which can cause more of a distraction than being helpful.

Group	Email on Each Post	Daily Digests	Weekly Digests	Limited 1
Customer Questions	0	0	0	۲

Figure 6-28. Selecting what customer questions to be notified from

Feed Tracking

Salesforce feed tracking with Chatter allows you to see changes made to records that are recorded in the Chatter feed. Enabling this option on an object allows a user to follow the changes made to that record in the Chatter feed. You can choose which object and what fields are tracked in the feed. You can track fields on the following objects: User, Group, custom and external standard objects, Account, Article Type, Asset, Campaign, Case, Contact, Contract, Dashboard, Event, Lead, Opportunity, Product, Report, Solution, and Task.

Note Field-level security and sharing settings are used in the Chatter feed to determine what users can see in the feed as well.

Enabling and Customizing Feed Tracking

Follow these steps:

1. Click the settings cog icon in the upper-right corner of the browser and select Setup, as shown in Figure 6-29.



Figure 6-29. Navigating to the Setup menu

2. In the Quick Find area, type **Feed Tracking** and select Feed Tracking under Chatter, as shown in Figure 6-30.

Setup	Home
Q Feed Tr	
✓ Feature Settings	
✓ Chatter	
Feed Tracking	g

Figure 6-30. Navigating to Feed Tracking

3. On the left side, click an object you want to configure for feed tracking, as shown in Figure 6-31.

2 Fields				
	Save Cancel	Enable Feed Tracking	F	Restore Defaults
	You can select up to 20 fields.			
	Account Name		Account Number	
2 Fields	Associat Output	2	Associat Cita	
) Fields				_
8 Fields	Account Source		Active	
) Fields	Annual Revenue		Billing Address	
	Clean Status		Customer Priority	
	010 0		DUNCNUM	
				_
	Data.com Key		Description	
	Employees		Fax	
Fields	Industry		NAICS Code	
		-		
	NAICS Description	-	Number of Locations	-
5 Fields	Ownership		Parent Account	
	Phone		Rating	
	SIC Code	8	SIC Description	
) Fields		-		
	SLA		SLA Expiration Date	
	SLA Serial Number		Shipping Address	
) Fields	Ticker Symbol		Tradestyle	
	Type		Upsell Opportunity	
Einte		-		2.00
	Website	0	Year Started	0
	Fields Fields Fields Fields	Fields Account Source Fields Annual Revenue Clean Status Clean Status D&B Company D&B Company Fields Data.com Key Fields Employees Fields Industry Fields Ownership Fields SIC Code Fields SIC Code Fields SIC Code Fields SIC SUA Fields SIC SUA Fields SUA Fields SUA Fields SUA Fields SUA Fields SUA Fields Website	Fields Account Source Fields Annual Revenue Fields Clean Status D&B Company D Fields Data.com Key Fields Employees Fields Industry Fields Ownership Fields SIC Code Fields SLA Serial Number Fields Ticker Symbol Fields Type	Fields Account Source Active Fields Account Source Active Fields Annual Revenue Billing Address Clean Status Customer Priority D&B Company D-U-N-S Number Fields Data.com Key Description Fields Employees Fax Fields Industry NAICS Code Fields Ownership Parent Account Fields SIC Code SIC Description Fields SIC Code SIC Description Fields Ticker Symbol Tradestyle Fields Ticker Symbol Year Started

Figure 6-31. Setting up feed tracking

- 4. At the top, make sure to select Enable Feed Tracking.
- 5. Select up to 20 fields to track per object. You don't need to select any fields here if you don't want to track changes to specific fields in Chatter. By selecting individual fields to track, this will capture the change that was made in Chatter. See Figure 6-32 for an example of feed tracking.

ACTIVITY	CHATTER	
Post	Poll Qu	restion
Share an	update	Share
	• helle Hoffman update Now	Q Search this feed C ⁴
Account Na sForce to s		
	i Like	Comment
w w	ite a comment	

Figure 6-32. How feed tracking shows up in Chatter

Note The more you select, the more cluttered your Chatter record feeds will become. Any field change on the field selection will add a new post to that record feed, pushing older posts lower.

6. Once you have set up all the objects as desired, click the Save button.

Chatter Profiles

Salesforce Chatter profiles allow your users to customize their Salesforce profile that is seen by other Salesforce users and the Chatter-free users (usually customers). They can add a profile picture, write an About Me section, add contact information, and add a header photo. The profile is another way your users can see their Chatter feeds, what groups they are part of, what files they've uploaded in posts, who they are following, and who is following them. They can even add a new post and comment on existing ones from their profiles.

To access your profile, click your profile picture in the upper-right corner and click your name, as shown in Figure 6-33.



Figure 6-33. Navigating to your profile

Other users can access your profile by clicking your hyperlinked name found on records, in Chatter posts, or anywhere else they see your name hyperlinked, as shown in Figure 6-34.



Figure 6-34. Accessing other users' profiles

Uploading Your Profile Picture

To upload your profile picture, follow these steps:

1. Once you have reached your profile, you can click the camera symbol and click Update Photo, as shown in Figure 6-35.



Figure 6-35. Uploading your profile picture

Note Your photo must be stored on your computer. It has to be in JPEG, GIF, or PNG format, and the file size must be smaller than 16MB.

2. Click the Upload Image button and choose the image from your computer location, as shown in Figure 6-36.



Figure 6-36. Uploading your profile picture from your computer

- 3. Use the slide bar to resize your photo. Select the check box "Show my photo on publicly accessible pages" if you want your photo disabled outside of Salesforce, as shown in Figure 6-37.
- 4. Once complete, click Save.



Figure 6-37. Modifying the size of your image

Editing Your Profile

To edit your profile, follow these steps:

1. Go to your profile by clicking your profile picture found in the upper-right corner of your browser, as shown in Figure 6-38.



Figure 6-38. Editing your profile

2. Click the word Edit found under your tabs on the right side of your browser, as shown in Figure 6-39.



Figure 6-39. Edit button

- 3. You can edit any field here on the profile just like any field in Salesforce. Let others know who your manager is, add the title that you hold with your company, add a phone number and cell phone number, add your office location, and, of course, don't forget to tell your other users a little bit about yourself in the About Me section, as shown in Figure 6-40.
- 4. Once complete, click Save.

*Name		Manager
First Name		Search People
Rachelle		
Last Name		
Hoffman		
Title		Company Name
Chief Technology Officer		Cloud Creations
Email		Phone
rhoffman@cloudcreations	5.com	(800) 951-7651
Address		Cell
Street		213-479-4550
130 Cook Ave		
City	State/Province	
Pasadena	CA	
Zip/Postal Code	Country	
91107	US	
About Me		
Cloud Creations Inc. provi		ervices, which include data import, integration, documentation, dium sized businesses to large enterprises.

Figure 6-40. Editing your profile

Updating Your Header Photo

To update your header photo, follow these steps:

1. Click the camera image in the right corner above the Edit button, click the "Select an image" button, find your image on your computer, and click Open, as shown in Figure 6-41.



Figure 6-41. Uploading your banner

Note Your photo must be stored on your computer. It has to be in JPEG, GIF, or PNG format. For the best results, use a panoramic image that is at least 1280×300 pixels.

2. Adjust your photo to fit the area provided. If you find that the photo won't work, click "Choose a different photo" to upload a new one, as shown in Figure 6-42.



Figure 6-42. Modifying the size of your banner

3. Click Save when complete.

After your user completes their profile, it should like Figure 6-43.

Cloud Creations	Chatter Groups 🗸	People 🗸	Accounts 🗸	Contacts 🗸	Cases 🗸	Opportunities 🗸	Leads 🗸	More 🔻
		Links	Hollow				E	dit User Detail
	Rachelle Hoffman Chief Technology Officer	Acres		11 110	100		Dist.	Apre and
Name Rachelle Hoffman		Manager				🐼 Groups (1)	•
Title		Company Nar	me			C) Custome	er Questions	
Chief Technology Officer		Cloud Creati	ons					View All
Email		Phone						
rhoffman@cloudcreations.co	m	(800) 951-76	551			Files (2)		-
Address 130 Cook Ave, Pasadena, CA 91107 US		Cell 213-479-455	50			Collabora Jun 21, 201	ting 17 • 12KB • doc	¢
About Me Cloud Creations Inc. provides documentation, reports, and enterprises.						Cloud log Jun 21, 201	o 17 • 8KB • png	
Post								View All
Share an update				Share		E Follower	s (0)	
						Following	g (0)	¥

Figure 6-43. Complete user profile

Salesforce Mobile App for iPhone and Android Users

Salesforce, the mobile app for iPhone and Android users, is included in every Salesforce license and, for the most part, can be downloaded and used immediately, as shown in Figure 6-44. Users can download the app from the App Store or Google Play and start using it today! Salesforce can work out of the box because it uses metadata to see what you've built and configured in the desktop environment. However, with that said, not everything you may have customized will be easy to use on the mobile app. Some of the changes you may need to configure are "quick action" items such as creating a task, logging a call, and creating a new lead or contact. Or you may need to configure compact layouts, which allow your user to see the most important detail of a record instead of the whole-page layout of fields. Lastly, the mobile navigation allows you to place actions and objects in a user-friendly order. Making sure that the Salesforce app is configured and available for your users will help your users' productivity. If you have users who are on the road or meeting with clients outside of the office, Salesforce app provides access to the records that they would be working with if they were in office or on the phone. Giving your users access to the mobile app will help them to capture necessary information when they are away from their desks. Also, if your user is out of the office and needs to find a client's number quickly or an address, they can use the mobile app to do that.



Figure 6-44. Salesforce mobile app

Quick-Start Guide to Setting Up the Mobile App

Salesforce offers a quick-start guide to setting up the mobile app.

- 1. Click the settings cog icon in the upper-right corner of the browser and click Setup.
- 2. In the Quick Find box, type in **Salesforce Mobile** and select the option Salesforce mobile Quick Start, as shown in Figure 6-45.



Figure 6-45. Launching the quick-start wizard for Salesforce mobile configuration

- 3. Click the button Launch Quick Start Wizard.
- 4. Click the Let's Get Started button, as shown in Figure 6-46.



Figure 6-46. Getting started with the quick start

5. You can remove or reorder items found on this navigation menu by clicking it and using the arrows in the middle or by dragging and dropping them into a new place, as shown in Figure 6-47.



Figure 6-47. Modifying the navigation menu

- 6. Once you are done with your navigation menu, click Save & Next at the lower-right corner of your screen.
- 7. Click the Arrange Global Actions button, as shown in Figure 6-48.



Figure 6-48. Arranging the global actions

8. Move actions that are necessary into the Selected Global Actions area and move ones that aren't needed into the Available Items using the arrows provided between these two areas. Reorder what actions appear first by dragging and dropping them into place, as shown in Figure 6-49.



Figure 6-49. Modifying the order of your actions

- 9. Click Save & Next when you are complete.
- 10. Click the Create Compact Layout button, as shown in Figure 6-50.



Figure 6-50. Configuring the contact compact layout

Note Through the quick start, you can only create a compact layout for contact records. We'll go over how to make compact layouts for other objects on the next page.

11. Move fields into the Compact Layout for Contacts area that you want displayed in your mobile app and move fields to the Available Fields section that you don't want to include. Reorder the arrangement of the fields by dragging and dropping them into place, as shown in Figure 6-51.



Figure 6-51. Modifying the order of the fields for your contact compact layout

- 12. Click Save & Next when you are complete.
- 13. In step 4 you can review what you have arranged in this quick start by clicking Navigation Menu, Global Actions, and Contact Compact Layout to see what you created. Do you see that a change needs to be made? Click the Edit button to be taken to that edit screen and make the change, as shown in Figure 6-52.



Figure 6-52. Reviewing what you've set up

- 14. Click Next when you are complete.
- 15. If you are ready to invite your users, type in the names in the To field and customize your subject and message. Click Send, as shown in Figure 6-53.
- 16. Click Next when complete and Finish.



Figure 6-53. Inviting users to download the Salesforce mobile app

Creating Compact Layouts

In step 10 previously, we mentioned that you can create compact layouts for other objects as well. Here's how:

- 1. Click the settings cog icon in the upper-right corner of the browser and click Setup.
- 2. Select the Object Manager tab found at the top next to the home tab.
- 3. Select the object that you want to configure a compact layout for and click the hyperlink name of that object, as shown in Figure 6-54.

Setup Home	Object Manager 🗸	
Cobject Manager 27 Items, Sorted by Laber		
LABEL		API NAME
Account		Account
Activity		Activity
Asset		Asset
Asset Relationship		AssetRelationship
Campaign		Campaign
Campaign Member		CampaignMember
Case		Case

Figure 6-54. Navigating to the compact layout for an object

 On the left side, you'll see various options and actions that can be made within this object. Select Compact Layouts, as shown in Figure 6-55.

Setup Home	Object Manager 🗸					
SETUP > OBJECT MANAGE Account	SETUP > OBJECT MANAGER Account					
Details	Details					
Fields & Relationships	Description					
Page Layouts Lightning Record Pages	API Name Account					
Buttons, Links, and Actions	Custom					
4 Object Limits	Singular Label					
Record Types	Account					
Related Lookup Filters	Plural Label Accounts					
Search Layouts						
Triggers						
Validation Rules						
Hierarchy Columns						

Figure 6-55. Selecting compact layouts

5. Create a new compact layout by clicking New, as shown in Figure 6-56.

Compact Layouts 1 Items, Sorted by Label			Q. Find in page			w Compact Layout Assignment		
LABEL		API NAME	PRIMA	RY	MODIFIED BY	L	AST MODIFIED	
System Default		SYSTEM	~					

Figure 6-56. *Clicking the New button*

6. Create a label for your compact layout and hit your Tab key to automatically create the name. Move the field from the Available Fields area to the Selected Fields area using the arrows in between. Move the order in which a user sees the details up and down by using the arrows next to Selected Fields, as shown in Figure 6-57.

Account Compact Layouts	Layout	Help for this Page 🥑
Compact layouts are used up to ten fields for the com viewed, and the permissio	d in Salesforce1 and some Chatter feed items to display a record's key fields at mpact layout, but the number of fields that display may vary based on the device ons of the user.	a glance. You can select and prioritize s's screen, which record page is being
Compact Layout Edi	lit Save Cancel	
Enter Compact Layou	ut Information	= Required Information
Label	Account Mobile	
Select Compact Layo	out Fields	
	Available Fields Selected Fields	
	Account Number Account Owner Account Source Active Annual Revenue Clean Status Created By Customer Priority D&B Company Data.com Key	
	Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assort	ment of fields.
	Save Cancel	

Figure 6-57. Creating a compact layout

- 7. Once complete, click Save.
- 8. Click the Compact Layout Assignment button, as shown in Figure 6-58.

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« Back to Account Compa					
Compact Layout De	tail	Edit Clone D	elete	Compact Layout Assignment)
Label	Account Mobile			Object Name	Account
API Name	Account_Mobile				
Included Fields	Account Name Account Site Billing Address Industry Phone Rating				
Created By	Rachelle Hoffman	. 6/22/2017 10:04 P	M	Modified By	Rachelle
			elete	Compact Layout Assignment	

Figure 6-58. Complete compact layout

9. Click the Edit Assignment button, as shown in Figure 6-59.

Account Compact Layouts Compact Layout « Back to Account Compact	
	Edit Assignment
Primary Compact Layo	ut
The primary compact layo	ut defines the fields that display when this object's records appear as list view items in Salesforce 1.
Primary Compact Layout:	System Default
	Edit Assignment

Figure 6-59. Edit Assignment button

- 10. Select from the drop-down the compact layout you created, as shown in Figure 6-60.
- 11. Click Save.
| Account Compact Layouts
Compact Layout Ass | signment |
|---|---|
| | Save |
| Primary Compact Layout | |
| Select the compact layout to use | when this object's records appear as list items in Salesforce1. |
| Primary Compact Layout: | System Default 🔻 |
| | System Default |
| | Account Mobile |

Figure 6-60. Selecting the compact layout

Summary

As you can see, there are many ways for your users to interact with each other and with external customers in Salesforce. Collaboration in a business is key to getting sales closed and or projects/tasks moving forward. With the use of Chatter and Salesforce mobile app, your users have all the tools available to work throughout their day.

CHAPTER 7

Lightning Process Builder

Lightning Process Builder is an extremely powerful business process automation tool that can solve a myriad of real-world business issues. Process Builder makes it easy to build logic in one place, with its enhanced point-and-click interface. With Process Builder, you can reduce or eliminate the need to build Apex code for simple processes. You can create automated logic to update related records, update fields, create a task, send an email, and much more. Click New to get started, as shown in Figure 7-1.

Q Search Salesforce	😒 🗉 ? 🌣 🐥 🦺
Setup 🔻 Home Object Manager 🗸	
Process Builder	← Back To Setup ? Help
My Processes	New
Welcome to the Process Builder!	It takes only a few clicks to:
With the Process Builder you can easily	Select your object
automate everything from daily tasks, like approvals and follow-up emails, to more complex processes, like order renewals	An opportunity, for example.
and new-hire onboarding. Click "New"	Define your criteria
above to get started. Learn More	Let's start this process when the opportunity's stage is Closed - Won and its amount is greater than \$500,000.
Using the Process Builder (documentation) Process Builder Overview (video)	Choose what to automate

Figure 7-1. Process Builder home page. Click New to get started.

Salesforce Workflow Rules vs. Process Builder

Salesforce has multiple solutions to automate your business process, including workflow rules and Process Builder.

Workflow rules are automated actions that take place when a record meets specified criteria and is saved. You can minimize the amount of manual data entry and processes by having a systematic process in place.

Process Builder is supported in Salesforce Lightning and does everything a workflow rule can do and more (with the exception of outbound messages). A Process Builder action can start when a record is changed or when invoked by another process. Both automation types support time-based actions.

If you have a simple single if/then statement, it is suggested that you use a workflow rule to automate your process. In other words, if you have criteria for automation that include simple logic, use a workflow rule. If there is a level of complexity to your automated requirement, Process Builder is best suited for this. Read the "Actions" section to learn more about what each action type does.

Table 7-1 identifies the differences between workflow rules and the Process Builder tool.

Action	Workflow Rules	Process Builder
Create a task	Х	Х
Update a field	Х	Х
Email an alert	Х	Х
Send an outbound message	Х	
Create a record		Х
Update a related record		Х
Use a quick action		Х
Send an email		Х
Launch a flow		Х
Post to the Chatter area		
Submit for approval		
Call an Apex method		

Table 7-1. Actions Available in Workflow Rules and Process Builder

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Process Builder: Action Types

Process Builder makes it easier to create automated actions because it is a visual designer, as shown in Figure 7-2.

Submit for Approval	•
Action Name* 🚯	
t	
Object *	
Account	
Approval Process *	
Default approval process	•
Submitter* 🕕	
Current User	*

Figure 7-2. Submit for Approval action type

The following are the actions that can be completed by a workflow rule or Process Builder:

• *Call on an Apex class*: Apex is a programming language used in Salesforce to develop complex processes. You can use Process Builder to call on an existing Apex class.

• *Create a Record*: Use this action to create a new record from any standard or custom object. Field values can be set to build the record appropriately.

Tip Required fields are still active when a record is created via a process. Make sure all required fields are given a value in the Set Field Values section in order to successfully create a record.

- *Email Alerts*: Select an existing email alert to automatically send an email to designated recipients.
- *Flows*: Choose this action to launch an existing visual workflow.
- *Post to Chatter*: Create a message and choose to update a user, Chatter group, or new Chatter post to the related record.

Note Merge fields can be used to generate the Chatter post.

• *Processes*: Use this action type to trigger another process.

Note Only active processes can be started.

- *Quick action*: Use this action type to start a quick action. Select "Global actions" to create a record or log a call. Select Object to define an action for the selected object.
- *Submit for Approval*: Choose to activate the default approval process or specific approval process for the given record, as shown in Figure 7-2. Control who the submitter is by selecting the appropriate value: Current User, User Field from a Record, or Specific User. Submission comments can be entered.
- *Update records*: Choose to update the existing record or a record related to the corresponding object (shown in Figure 7-3).

Select a Record to Update



Figure 7-3. Selecting a record to update in Process Builder

Time-Dependent Actions

When a record meets the criteria, the action can be executed immediately or on a specified schedule.

To control when the action is executed, add a time lapse to the process, as shown in Figure 7-4. Actions can be triggered to run before or after a specified date.

Days 🔻	After 💌	Select a date	•
Days 🔻	from now.		

Figure 7-4. Setting the time for a time-dependent action

Example

As an example, let's create an automated action to send a "Happy Birthday" card to all active clients one day before birthdate. The Scheduled Actions option is available only when the first node of the process starts the process with "only when a record is created" *or* "when a record is created or edited" is selected *and* the Yes check box is selected in the criteria node in the Advanced section, as shown in Figure 7-5.

Define Criteria for this A	ction Group			
Criteria Name* 🚯				
Criteria Test				
Criteria for Executing Actions O Conditions are met	*			
 Formula evaluates to true 	2			
No criteria-just execute t	he actions!			
Set Conditions				
Field *	Operator*	Type*	Value*	
1 [Account].Na Q	Equals 🔻	String	Test	
+ Add Row				
Conditions *				
 All of the conditions are r 	net (AND)			
 Any of the conditions are 	met (OR)			
Oustomize the logic				
✓ Advanced				
Do you want to execute the ad	ctions only when spe	cified changes are n	hade to the record? 🕚	
 Yes 				

Figure 7-5. Setting the criteria for an action group

Creating a Process Using Process Builder

Follow the steps in this section to create an automated business process.

In this scenario, you will encounter a real-world business problem. Say sales users have to manually create a project record with the same details stored at the opportunity level. Rather than creating a new record and copying and pasting the details, it is beneficial for them to have the tool automatically create a new project record. At the same time, it's beneficial to automatically pull the details stored in the opportunity record into the new project record.

Note In this use case, project records are records stored in a custom object titled Projects.

For all opportunities that are set to Closed Won, you want to create a new project record and update the Project field Next Step to say Schedule Project Kickoff.

Note This is a use case you can use while managing projects in Salesforce. These steps can also be tweaked to create the new policy records most commonly used with insurance companies. Those in the financial services industry also use this concept to create new financial accounts records when an opportunity closes. These are just a few examples. The opportunities to use automation in Salesforce are endless!

Follow these steps to create this process:

1. From Setup, select Process Automation in the Platform Tools section, as shown in Figure 7-6.



Figure 7-6. Process Automation in Setup

2. Next, select Process Builder to access the Process Builder home page.

All active and inactive processes are listed on this page, as shown in Figure 7-7, along with the description of the process, the related object, the process type, the last modified date, the status, and the actions.

ack To Setup ? I	Help
Ne	ew
	N

Figure 7-7. Process Builder home page and list of processes

- 3. Click the New button to start a new process.
- 4. Type the process name and press Tab to generate the API name, as shown in Figure 7-8.

	New Process
Process Name*	API Name * 🕦
Description	
The process starts when *	
Select One	•
	Cancel

Figure 7-8. Naming your process

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Note It is not required but recommended to enter a description for each process. For organizations with numerous automation processes, it can be challenging to find the right process when there are no descriptions.

5. Determine when the process should start. Your options include when "A record changes" and when "It's invoked by another process."

Note You can break down more complex processes into simpler processes. These processes can be reused and invoked by another process, as mentioned earlier.

With the current scenario, you will start the process when "A record changes." Click Save, as shown in Figure 7-9.

A record changes	*

Figure 7-9. Starting a process when a record changes

6. When you first start your process, you must select the object it starts from. Select Add Object, as highlighted in Figure 7-10.

START + Add Object			
+ Add Criteria TRUE	IMMEDIATE ACTIONS	SCHEDULED ACTIONS	
	+ Add Action	Set Schedule	
FALSE		+ Add Action	
STOP			

Figure 7-10. Selecting an object in Process Builder

7. Choose the object that the process should be evaluated from, as shown in Figure 7-11. In this example, you will select Opportunity.



Figure 7-11. Choosing when to start a process

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- 8. Select when the process should start, as shown in Figure 7-11.
 - a. Select "only when a record is created" to only start the process for new records.
 - b. Select "when a record is created or edited" to start the process for new records *and* existing record that are edited upon saving.
- 9. You can click Yes, as shown in Figure 7-12, to evaluate the record multiple times (up to five times) in one execution.



Figure 7-12. Click Yes to allow the process to evaluate a record multiple times in a single transaction

- 10. Confirm your specification and click
- 11. Select the Add Criteria node shown in Figure 7-13 to set the criteria for this process.



Figure 7-13. Adding a criteria node to a process

12. Set the criteria that the record should meet in order for the actions to be executed.

In this example, you want to set the criteria for the process to start only when opportunity records have a stage marked as Closed Won.

Setting the Criteria

Follow these steps to set the criteria for a process:

1. Name your criteria, as shown in Figure 7-14.

ing Actions re met uates to true				
ist execute t	he actions!			
	Operator*	Time*	Value	*
			Value	
	Liquito	Skilling		
	eld Q	Operator*	Operator * Type*	Operator* Type* Value

Figure 7-14. Steps to setting the criteria

- 2. Find a field and choose the appropriate operator to set the criteria.
- 3. Select the criteria for executing the action (shown in Figure 7-15). You can choose to execute the actions only when the criteria are met, when a formula evaluates to be true, or with no criteria; just evaluate the action for that object. In this example, select "No Criteria-just execute the actions!" to execute the action for all opportunity records.



Figure 7-15. Setting the criteria for executing an action

4. Set the conditions. Use fields and operator values to set these conditions, as shown in Figure 7-16.



Figure 7-16. Setting the conditions to invoke a process

- 5. Once the criteria are all set, click Save.
- 6. Choose what the action should be once this criterion is met. Click Add Action, as shown in Figure 7-17.



Figure 7-17. Adding an immediate action to a process

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- 7. Define the action type.
- 8. In this scenario, you want to create a new project record. Click Create a Record.
- 9. Name the action and choose what type of record should be created, as shown in Figure 7-18.

Action Name* 🚯	
Create a Project	
Record Type*	

Figure 7-18. Naming the action and choosing the record type

10. Set the field values for the new record, as shown in Figure 7-19, In our example, we set all the field values that we want to carry over into the new project record.

Field *		Туре*		Value*	
Next Steps	-	String	-	Schedule Project Kickoff],

Figure 7-19. Setting the field values when creating a new record

Note All required fields must be entered when choosing this action. If a required field value is not entered, the record will not be created.

11. Once you confirm that the criteria and actions are correct,

click Save

12. To make this process active. Click Activate, as shown in Figure 7-20.



Figure 7-20. Activating a process

Note Only one version of the process can be active at a time.

13. It is best practice to test the process. Create a test record to test this new automated process.

Summary

In this chapter, we reviewed the high-level details of what Process Builder can do. You can automate a lot more than you can with just workflow rules. It's important to know that there are countless ways you can build automation into your existing setup. Use this chapter as a guide as to what the practical capabilities are with Process Builder.

CHAPTER 8

Data Management

Salesforce offers an array of data management tools. Lightning Salesforce offers a Data Import Wizard that allows you to update existing records or create new records (Figure 8-1). The Data Import Wizard allows imports, updates, and inserts to be performed using commaseparated value (CSV) files, Outlook CSV, ACT! CSV, and Gmail CSV. Salesforce not only supplies an importing tool but also provides tools to help you export your data into CSV files, mass transfer records from one owner to another based on the criteria of the record, and mass delete records based on the criteria of the record. Salesforce also provides data control tools that help you control the type of data your users are adding to the system. You can create duplication rules to prevent users from adding duplicate records. Data management is hugely important for organizations; in fact, your Salesforce organization is only as good as the data you collect with it. If the data is "dirty," your reports will be too. Having accurate and useful data will allow you to properly analyze your information. This in turn will allow you to better the user and client experience.



Figure 8-1. Importing can be easy!

Using the Data Import Wizard

The Data Import Wizard that Salesforce has provided allows you to import new records and update existing records. All you need is a CSV file with column headers that match your existing Salesforce fields and your data in the rows of the spreadsheet (Figure 8-2).

1	А	В	С	D	E	F	G
1	Account Name	Salutati	First Nan 👻	Last Nan 👻	Title 💌	Mailing Street 🛛 👻	Mailing Cit 💌
2	Burlington Textiles Corp of America	Mr.	Jack	Rogers	VP, Facilities	525 S. Lexington Ave	Burlington
3	Dickenson plc	Mr	Andy	Young	SVP, Operations	1301 Hoch Drive	Lawrence
	Edge Communications	Ms.	Rose	Gonzalez	SVP, Procurement	313 Constitution Place Austin, TX 78767 USA	
-	Euge communications	IVIS.	nose	GUIIZalez	SVP, Procurement	312 Constitution Place Austin, TX 78767	
5	Edge Communications	Mr.	Sean	Forbes	CFO	USA	
						620 SW 5th Avenue Suite 400 Portland,	
6	Express Logistics and Transport	Ms.	Babara	Levy	SVP, Operations	Oregon 97204 United States	
						621 SW 5th Avenue Suite 400 Portland,	
7	Express Logistics and Transport	Mr.	Josh	Davis	Director, Warehouse Mgmt	Oregon 97204 United States	
						345 Shoreline Park Mountain View, CA	
8	GenePoint	Ms.	Edna	Frank	VP, Technology	94043 USA	
						2335 N. Michigan Avenue, Suite 1500	
9	Grand Hotels & Resorts Ltd	Mr.	Tim	Barr	SVP, Administration and Finance	Chicago, IL 60601, USA	
						2334 N. Michigan Avenue, Suite 1500	
10	Grand Hotels & Resorts Ltd	Mr.	John	Bond	VP, Facilities	Chicago, IL 60601, USA	
11	Pyramid Construction Inc.	Ms.	Pat	Stumuller	SVP, Administration and Finance	2 Place Jussieu	Paris
12	sForce	Ms.	Siddartha	Nedaerk		The Landmark @ One Market	San Francisco
13	sForce	Mr.	Jake	Llorrac		The Landmark @ One Market	San Francisco
						1303 Avenue of the Americas New York,	
14	United Oil & Gas Corp.	Ms.	Stella	Pavlova	SVP, Production	NY 10019 USA	
	· ·					1304 Avenue of the Americas New York,	
15	United Oil & Gas Corp.	Ms.	Lauren	Boyle	SVP, Technology	NY 10019 USA	

Figure 8-2. CSV file ready for an import into the Salesforce organization

You can easily create a CSV file with an Excel spreadsheet. Once you save the file, you'll see under the file name that you create a "save as" type. Select the drop-down and change it to "CSV (Comma delimited)." According to your Excel version, the verbiage may change. See Figure 8-3 for an example.



Figure 8-3. How to save an Excel file into a CSV file format

Preparing Your Data for an Import

To prepare your data for a contact and account import, you must make sure that in your CSV file there is a column for all the required fields you may have set up or the ones that come standard with Salesforce. You can determine what fields are required by editing a record and looking for the fields with a red line next to them. You can include any field as a column in this CSV file that is found on the object you are importing to. Another important preparation step is to ensure that the data being imported matches the data type of the field. It is important to prepare your data because if it is incorrect, it will give you an error and not import that record. To prevent spending hours on import, follow these tips:

- The date data type can be accepted only with this format: MM/DD/YYYY.
- The date and time data type can be accepted in the following format: MM/DD/YYYY hh:mm:ss. There are other formats accepted as well.

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- The number and currency data type will take only numbers (no letters).
- The check box data type will accept TRUE and FALSE values (TRUE = selected, FALSE = deselected).
- The email data type fields require that an at (@) symbol be present and a dot (.) with an appropriate suffix be included (.com, .org, .gov, etc.). Salesforce doesn't check for a specific suffix type, but if it sees no suffix after the dot, it will typically produce an error.
- Picklist data type fields must exactly match what is already included in the values for that picklist, or you can at the field level deselect the box "Restrict picklist to the values defined in the value set" so that any value will be included and imported.
- Multiselect picklist values must be separated by a semicolon (for example, blue; red; green).
- The URL data type field will need to include a dot with a suffix (.com, .org, .gov, etc.).

Note In this import wizard, if the account name is the same as another in your CSV file, Salesforce will not create a duplicate. If the account name has one extra letter, Salesforce will see this as a new account and create a duplicate.

Additionally, if you label your column headers with the Salesforce field label, the Salesforce import wizard will automatically map your columns to the Salesforce fields (we'll speak about this in step 9).

• Try to match all your column headers to the field names for your import. Most importing tools will "automap" your column headers to the appropriate fields.

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Importing Accounts and Contacts with the Data Import Wizard

The Salesforce Data Import Wizard is a great, easy-to-use tool. It provides videos to help walk you through importing and has great a FAQ section. It even gives you a step-by-step process for setting up the import. It is important to keep your Salesforce data accurate and current. Whether you are importing accounts and contacts for the first time or adding new ones to the system, you'll need to know how to do this for data integrity.

1. Prepare your data for import. Accounts in a standard Salesforce setup require the account name. Along with accounts, you can import contacts. Contacts in a standard Salesforce setup will require an account name and the last name. Because an account name is required for a contact, you can in your CSV file set the account and account details in one row and just use the account name for all the contacts related to that account for additional contacts. If you populate different account field details in the account fields to each contact, the last row of the import for that account will reflect in Salesforce. In Figure 8-4, Cloud Creations on row 5 would be the information seen in Salesforce after the import is performed.

1	A	B	C	U	E	- F	G
1	Account Name	Account Website	Account Industry	Salutati	First Nan 👻	Last Nan 👻	Title 💌
		Burlingtontextilescorpofamerica.co					
2	Burlington Textiles Corp of America	m	Clothing	Mr.	Jack	Rogers	VP, Facilities
3	Dickenson plc	Dickenson.com	Clothing	Mr	Andy	Young	SVP, Operations
4	Cloud Creations	Cloudcreations.org	Telecommunications	Ms.	Rachelle	Hoffman	сто
5	Cloud Creations	Cloudcreations.com	Salesforce Consultants	Mr.	Felicia	Duarte	соо
5	cloud creations	cloudcreations.com	salesione consultants	wit.	relicia	Duarte	000

Figure 8-4. Data ready for an import

2. Navigate to the Setup menu, as shown in Figure 8-5.



Figure 8-5. Navigating to the Setup menu

3. In the Quick Find box, type **Data import** (don't hit the Enter key; the option will populate as you type). Click Data Import Wizard, as shown in Figure 8-6.



Figure 8-6. Searching for Data Import Wizard

4. Click the green Launch Wizard! button, as shown in Figure 8-7.

	Import your data i	n 3 easy steps!					
	Launch the Data Import Wizard to import your data.						
Pre-step: Prepare your data for import	Choose data to import	Edit field mapping	Review and start import				
	Launch W	izard!					

Figure 8-7. Accessing the Data Import Wizard

5. Under the "What kind of data are you importing? question, click Accounts and Contacts on the "Standard objects" tab, as shown in Figure 8-8.

What kind of data ar	e you importing? 🕼		
Standard objects	Custom objects		
Accounts and Cont	tacts	~	
Leads	Leads		
Solutions		>	
Campaign Member	ſS	×	

Figure 8-8. What kind of data are you importing?

- 6. Under the "What do you want to do?" question, click "add new records" and the following information will appear:
 - *Match contact by*: This allows you to match your CSV data to an existing contact, if it already exists in Salesforce, by the full name of the contact, email, or any field you have created

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and made a unique ID or external ID. This helps to prevent duplication when importing. You would want to choose which you think is the best match. Most commonly an email is used.

Note The unique ID or external ID is an ID or a unique identifier that relates only to that record. When transitioning data from another CRM to Salesforce, your other CRM will contain its own unique ID. You should create a field and mark it as an external ID and import this field to your Salesforce instance. This will allow you to make updates to it in the future should you forget to include something in your original import. Or, for business use integrations to other systems, an external ID is essential to relate the two organizations together and make sure that you have only one record being updated. Salesforce creates its own unique ID for every record created as well; it is a 15- to 18-character alphanumeric ID. You can find this ID for your records in reports; just search for the field ID, as shown in Figure 8-9, or find it in the URL of your browser, as shown in Figure 8-10.

Report Type: Contacts & Account		Mailing List			
Save Save As Close	Report Prop	erties 🕞 Run R	leport		
Fields All a # Q ID Drag and drop to add fields to the report. Contact: General Contact ID Account: General Account ID	Filters Show Date Field To add filte	Add My contacts Created Date ers, click Add.		Custom 1	▼ From 8/28/2017 📷
- a Parent Account ID	Preview	Tabular Format	Show Last Name	Remove All Colun	Title
	Ms.	Rose	Gonzalez	Rachelle Hoffman	

Figure 8-9. How you can search for the ID for your record in reports

- > C 📑	Secure https://	na73.lightning.fo	orce.com/one/on	e.app#/sObjec	t 00311000002BdCGQA0,	view
						Q Search
Cloud C	Creations H	ome Leads 🗸	Accounts 🗸	Contacts 🗸	Opportunities 🗸 Rep	ports 🗸 D
	dra Eberhard					

Figure 8-10. Where you can find your record ID in your browser URL

7. *Match Account by*: This allows you to match your CSV data to an existing account, if it already exists in Salesforce, by the account name and site (a standard web site field on accounts) or any field you have created and made a unique ID or external ID, as shown in Figure 8-11.

What do you want to do? 🔞	
Add new records	~
Match Contact by: Email Match Account by: Mame & Site Trigger workflow rules and processes? Trigger workflow rules and processes for new and updated records Assign All Contacts to Campaigns	
Assign contacts to campaigns	
Update existing records	>
Add new and update existing records	>

Figure 8-11. What do you want to do?

Note You can make any of the following data type fields a unique ID or external ID by creating or editing the field and selecting the unique or external ID check box: auto-number, email, number, or text.

- 8. Salesforce allows for automated processes made with workflow rules or the Process Builder to be enabled or disabled. By checking the box, you are enabling them to be active during this import. This is important to consider if you have created actions that include email and tasks because this could bombard your clients or users. For example, you could have a workflow rule that can email a contact a welcome email every time a contact is created. If you keep this selected, all contacts imported will receive this email.
- You can also assign all contacts imported to an existing campaign. If you select this option, you need to include a column in your import containing the campaign Salesforce ID.
- 10. Under the "Where is your data located?" question, you can drag and drop a CSV file into the "Drag CSV file here to upload" area, as shown in Figure 8-12. You can also click CSV, Outlook CSV, ACT! CSV, or Gmail CSV and then click Choose File. Locate the file on your machine and click Open.

Where	is your data located? 🖗
	Drag CSV file here to upload
	CSV File Choose File Accounts_Coimport.csv Character Code ISO-8859-1 (General US & Western European, ISO-LATIN-1) Values Separated By Comma Comma Comma
2	Outlook CSV
8	ACTI CSV
G	GMail CSV

Figure 8-12. Where is your data located?

11. Once these steps are complete, click the Next button at the bottom-right corner of your screen, as shown in Figure 8-13.



Figure 8-13. Click the Next button on the screen

12. In the Edit Mapping field, this is where you choose what column header is mapped to what Salesforce field on the accounts or contacts. If you set your column headers up correctly, you'll see that Salesforce will match all your columns to the fields in Salesforce, as shown in Figure 8-14. In Figure 8-15, you'll see that the headers didn't match the names of the fields. Steps 13 and 14 are additional steps to follow should you not match the headers of your columns to the field names they are mapping too.

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Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Contact: Salutation	Salutation	Ms.	Mr.	Mr.
Change	Contact: First Name	First Name	Rose	Sean	Jack
Change	Contact: Last Name	Last Name	Gonzalez	Forbes	Rogers
Change	Contact: Title	Title	SVP, Procurement	CFO	VP, Facilities
Change	Contact: Mailing Street	Mailing Street	313 Constitution Place	312 Constitution Place	525 S. Lexington Av
Change	Contact: Mailing City	Mailing City			Burlington
Change	Contact: Mailing State/Province	Mailing State/Province			NC
Change	Contact: Mailing Zip/Postal Code	Mailing Zip/Postal Code			27215
Change	Contact: Mailing Country	Mailing Country			USA
Change	Contact: Phone	Phone	(512) 757-6000	(512) 757-6000	(336) 222-7000
Change	Contact: Mobile	Mobile	(512) 757-9340	(512) 757-4561	
Change	Account: Fax	Fax	(512) 757-9000	(512) 757-9000	(336) 222-8000

Figure 8-14. Field mapping when you matched your column headers to the field names in Salesforce correctly

Second Second					
Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Мар	Unmapped	Mr/Mrsetc	Ms.	Mr.	Mr.
Мар	Unmapped	F name	Rose	Sean	Jack
Мар	Unmapped	L name	Gonzalez	Forbes	Rogers
Change	Contact: Title	Title	SVP, Procureme	CFO	VP, Facilities
Мар	Unmapped	Street Address	313 Constitution	312 Constitution	525 S. Lexington Ave
Мар	Unmapped	City			Burlington
Мар	Unmapped O	State			NC
Мар	Unmapped O	Zip			27215
Мар	Unmapped @	Country			USA
Мар	Unmapped	#	(512) 757-6000	(512) 757-6000	(336) 222-7000
Мар	Unmapped	cell	(512) 757-9340	(512) 757-4561	
Change	Contact: Email	E-mail	rose@edge.con	sean@edge.cor	jrogers@burlington.com
Мар	Unmapped	Company	Edge Communi	Edge Communis	Burlington Textiles Corp of America

Figure 8-15. Field mapping when you didn't match your column headers to the field names in Salesforce

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13. If you see a triangle with an exclamation mark inside, this means that there is an error with your mapping, as shown in Figure 8-16. Hover over the icon to display the error message. In most cases, it is because you have mapped one column to multiple fields.



Figure 8-16. Shows the little triangle symbol

Note If your import requires that two fields be updated with the same information, you'll need to create two columns with the same data in each and map the columns to the respective fields. Importing tools can link to only one data point at a time.

14. If you see a field in bold red like Figure 8-15, this means the field still needs to be mapped. To map a field or change a field already mapped, click the Map or Change hyperlink. You can either type in the field name or use the scroll bar to find the field. Select the appropriate field and click Map, as shown in Figure 8-17.

Map your field: Acco	unt Owner		
Map to: Salesforce Field •			
Select field			
Owner			
Account: Ownership Account: Record Owner Contact: Record Owner	•		-
Account: Parent Account			
Account: Billing Street			
Account: Billing City			
Account: Billing Zip/Postal Con	de		-
		Cancel	Мар

Figure 8-17. Mapping fields using the Data Import Wizard

Note If you don't create a record owner field in your import, the records created will automatically be assigned to the user performing the import. This could impact your organization if you have security set up that eliminates users from seeing data. For example, if you have a role hierarchy set up that puts you at the top of the hierarchy and you are the importing user, users below you may not be able to see the records you've imported. This ultimately means they can't do their jobs.

15. Once you have reviewed that all the columns are mapped to the appropriate fields, click the Next button at the bottom-right corner, as shown in Figure 8-18.



Figure 8-18. Click the Next button to continue

16. The Review & Start Import screen summarizes what objects you're importing to, what type of import it is (insert, update, upset), what CSV you are using for your import, how many fields are mapped, and how many are unmapped, as shown in Figure 8-19.

			Great job	
Choose data	Edi	Edit mapping		
Review & Start Import Review your import information and click S Your selections:			Help for this page	
Accounts and Contacts 🗸	Your import will include: Mapped fields	Your import will not include:		
Accounts and Contacts Add new records Leads import.csv	13	0		

Figure 8-19. A review of your import before you click Start Import

17. Once you have reviewed this information and feel that it is correct, click the Start Import button, as shown in Figure 8-20.



Figure 8-20. Start Import button

 Click the OK button on the congratulations page to be taken to the bulk data load job request and status page, as shown in Figure 8-21.



Figure 8-21. OK button

19. If the import is a large import (tens of thousands of rows), the job being processed can take up to several hours. If it is a small import, you may find that your job will be finished as soon as you click OK, as shown in Figure 8-22.

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8ulk Data Load Jo 75011000		ç										Help fo	or this Page
iew the details			b.										
Back to List: 8 Bulk Data L				R	eload								
	J	ob ID 7	5011000000	Dalie				Status	Closed			Total Processing Time (ms)	185
	Submitte	d By R	achelle Ho	fman				Operation	Insert			API Active Processing Time (ms)	113
	Start	Time 9	5/2017 8:5	2 PM PST			Que	ued Batches	0			Apex Processing Time (ms)	0
	End	Time 9	5/2017 8:5	2 PM PST			In Progr	ess Batches	0				
Time to Com	nplete ([hh:]ma	n:ss) 0	0:00				Comple	ted Batches	1				
			ccount				Fa	iled Batches	0				
	External ID							Progress	100%				
	Content		SV					s Processed	20				
	Concurrency I		arallel				Re		0				
	API Ve	rsion 4	0.0					Retries	0				
				R	eload								
Batches					_								
View Request	View Result	Batch ID		Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
	View Result	751100	00003686	9/5/2017 8:52 PM	9/5/2017 8:52 PM	165	113	0	20	0	0		Complete

Figure 8-22. Import summary

20. Salesforce will send you an email when your job is complete and will attach an error file to review any errors on your import. Some errors could include a data type not matching. Another could be that Salesforce is seeing a blank row, as shown in Figure 8-23.

Sa	alesforce import of "Leads import.csv" has finished. 20 rows we	re processed. Inb	ox x	ē	2
	noreply@salesforce.com <noreply@salesforce.com> to me v</noreply@salesforce.com>	🖙 8:54 PM (1 n	ninute ago) ☆	*	Ŧ
	Your Accounts and Contacts imports are complete. Here are your results:				
	Accounts Created: 20 Accounts Updated: 0 Accounts Ignored: 0 (We ignored updates that we couldn't match to an existing record Accounts Failed: 0 (We couldn't import these due to errors.) Processed job information for imported Accounts: https://na73.salesforce.com/750100		mail=1		
	Contacts Created: 18 Contacts Updated: 0 Contacts Updated: 0 Contacts Ignored: 0 (We ignored updates that we couldn't match to an existing record Contacts Failed: 2 (We couldn't import these due to errors.) Accounts/Contacts Rejected: 0 (We rejected duplicate rows.) Processed job information for imported Contacts: <u>https://na73.salesforce.com/750110</u>		nail=1		
	The details of the first 1,000 errors can be found in the attachments for this email:				
	Contacts_Errors				

Figure 8-23. Email that is received when the import is complete

Importing Leads

Ideally, you'll find that you get to import new leads all the time! Whether you get new leads from a conference you attend or a purchased list, you'll want to import them immediately to get your sales team working on them! The following steps will show you how to quickly make this happen:

- 1. Prepare your data for the import. Make sure that all the required fields are populated columns in your import. The standard Salesforce setup requires a last name, a company name, and a lead status.
- 2. Navigate to the Setup menu, as shown in Figure 8-24.



Figure 8-24. Navigating to the Setup area in Salesforce

3. In the Quick Find area, type **Data import** (don't hit the Enter key; the option will populate as you type). Click Data Import Wizard, as shown in Figure 8-25.



Figure 8-25. Searching for Data Import Wizard

4. Click the green Launch Wizard! button, as shown in Figure 8-26.



Figure 8-26. Launching the Salesforce wizard

5. Under the "What kind of data are you importing?" question, click Leads on the "Standard objects" tab, as shown in Figure 8-27.



Figure 8-27. What kind of data are you importing?
- 6. Under the "What do you want to do?" question, click "Add new records," and the following information will appear:
 - *Match Lead by*: This allows you to match your CSV data to an existing lead contact if it already exists in Salesforce by the full name of the lead, email, or any field you have created and made a unique ID or external ID. This helps to prevent duplication from being imported. You would want to choose which you think is the best match. Most commonly email is used.
 - Assign New Leads to this Source: This allows you to select what lead source all the leads should be assigned to. If you have an import that is not a mixture of lead sources, you can use this function. For example, if you just attended a conference and you want to show that all these leads came from that conference, you would globally assign all the imported leads from this list to that lead source. If you have a mixture of sources where your leads came from, you'll want to ignore this.
 - Assign all leads using Assignment rules: This allows you to utilize a lead assignment rule you've created to auto-assign the owner. The drop-down should include all your options that you created in lead assignments. If all the leads you are importing need to be assigned to specific users, you can ignore this feature. However, if you purchased a list and these leads are up for anyone, you may want to let your auto-assignment rules handle who gets what.
 - Assign leads to campaigns: This allows you to add all the imported leads to a campaign. You'll just need to make sure to include a column in your spreadsheet with that campaign ID. If you want to have all the imported leads related to a campaign for an event or a campaign for an email blast, you can do this with this function.
- 7. Salesforce allows for automated process made with workflow rules or the Process Builder to be enabled to disabled. By checking the box, you are enabling them to be active during this import. This is important to consider if you have created actions that include email and tasks as this could bombard your clients or users.

8. Under the "Where is your data located?" question, you can drag and drop a CSV file into the "Drag CSV file here to upload" area, as shown in Figures 8-28 and 8-29. You can also click CSV, Outlook CSV, ACT! CSV, or Gmail CSV. Then click Choose File, locate the file on your machine, and click Open.

What do you want to do? 🕜	
Add new records	*
Match Lead by: None Assign New Leads to this Source None Assign All Leads Using this Assignment Rule None Use Assignment Rules to Email Owners? Use assignment rule settings to send notification emails to record owners Assign All Leads to Campaigns Assign All Leads to Campaigns)
Trigger workflow rules and processes? Trigger workflow rules and processes for new and updated records	d
Update existing records	>
Add new and update existing records	>

Figure 8-28. What do you want to do?



Figure 8-29. Where is your data located?

9. Once these steps are complete, click the Next button at the bottom-right corner of your screen, as shown in Figure 8-30.



Figure 8-30. Next button

10. In the Edit Mapping field, this is where you choose what column header is mapped to what Salesforce field on the lead. If you set your column headers up correctly, you'll see that Salesforce will match all your columns to the fields in Salesforce, as shown

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in Figure 8-31. In Figure 8-32, you'll see that the headers didn't match the names of the fields. Steps 11 and 12 are additional steps to follow if you did not match the headers of your columns to the field names they are mapping to.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Contact: Salutation	Salutation	Ms.	Mr.	Mr.
Change	Contact: First Name	First Name	Rose	Sean	Jack
Change	Contact: Last Name	Last Name	Gonzalez	Forbes	Rogers
Change	Contact: Title	Title	SVP, Procurement	CFO	VP, Facilities
Change	Contact: Mailing Street	Mailing Street	313 Constitution Place	312 Constitution Place	525 S. Lexington Av
Change	Contact: Mailing City	Mailing City			Burlington
Change	Contact: Mailing State/Province	Mailing State/Province			NC
Change	Contact: Mailing Zip/Postal Code	Mailing Zip/Postal Code			27215
Change	Contact: Mailing Country	Mailing Country			USA
Change	Contact: Phone	Phone	(512) 757-6000	(512) 757-6000	(336) 222-7000
Change	Contact: Mobile	Mobile	(512) 757-9340	(512) 757-4561	
Change	Account: Fax	Fax	(512) 757-9000	(512) 757-9000	(336) 222-8000

Figure 8-31. Field mapping when you matched your column headers to the field names in Salesforce correctly

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Мар	Unmapped	Mr/Mrsetc	Ms.	Mr.	Mr.
Мар	Unmapped 🚳	F name	Rose	Sean	Jack
Мар	Unmapped	L name	Gonzalez	Forbes	Rogers
Change	Contact: Title	Title	SVP, Procureme	CFO	VP, Facilities
Мар	Unmapped 💿	Street Address	313 Constitution	312 Constitution	525 S. Lexington Ave
Мар	Unmapped	City			Burlington
Мар	Unmapped	State			NC
Мар	Unmapped O	Zip			27215
Мар	Unmapped Ø	Country			USA
Мар	Unmapped	#	(512) 757-6000	(512) 757-6000	(336) 222-7000
Мар	Unmapped 💿	cell	(512) 757-9340	(512) 757-4561	
Change	Contact: Email	E-mail	rose@edge.con	sean@edge.cor	jrogers@burlington.com
Мар	Unmapped	Company	Edge Communi	Edge Communit	Burlington Textiles Corp of America

Figure 8-32. Field mapping when you didn't match your column headers to the field names in Salesforce

11. If you see a field in bold red, this means that the field still needs to be mapped, as shown in Figure 8-33. To map a field or change a field already mapped, click the Map or Change hyperlink. You can either type in the field name or use the scroll bar to find the field. Select the appropriate field and click Map, as shown in Figure 8-34.

Б	dit	Mapped Salesforce Object	CSV Header	Example	Example	Example
м	lap	Unmapped 💿	MriMrsetc	Ms.	Mr.	Mr.
м	ap	Unmapped 💿	Fname	Rose	Sean	Jack

Figure 8-33. Fields shown as unmapped

Salutation $ imes$ Find field		
Name		
First Name		
Last Name		
Salutation		
Title		
Company		

Figure 8-34. Selecting a field

Note If you don't create a record owner field and you don't choose to use your lead assignment rules in the import, the records created will automatically be assigned to the user performing the import. This could impact your organization if you have security set up that eliminates users from seeing data. For example, if you have a role hierarchy set up that puts you at the top of the hierarchy and you are the importing user, users below you may not be able to see the records you've imported. This ultimately means they can't do their jobs.

12. Once you have reviewed that all the columns are mapped to the appropriate fields, click the Next button at the bottom-right corner, as shown in Figure 8-35.



Figure 8-35. Next button

13. The Review & Start Import screen summarizes what objects you're importing to, what type of import it is (insert, update, upsert), what CSV you are using for your import, how many fields are mapped, and how many are unmapped, as shown in Figure 8-36.

			Great job
Choose data		Edit mapping	Start import
Review & Start Import Review your import information and click S	tart Import.		Help for this page 🍯
Your selections:	Your import will include:	Your import will not include:	
Accounts and Contacts 🗸	Mapped fields	Unmapped fields	
Add new records 🗸 Leads import.csv 🗸	13	0	

Figure 8-36. Import review

14. Once you have reviewed this information and feel that it is correct, click the Start Import button, as shown in Figure 8-37.



Figure 8-37. Start Import button

 Click the OK button on the congratulations page to be taken to the bulk data load job request and status page, as shown in Figure 8-38.



Figure 8-38. OK button

16. If the import is a large import (tens of thousands of rows), the job being processed can take up to several hours. If it is a small import, you may find that your job will be finished as soon as you clicked OK, as shown in Figure 8-39.

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ulk Data Load Jo 75011000		2										Help fo	or this Page
iew the details <u>Back to List: B</u>			b.										
Bulk Data L	oad Job De	etail		R	eload								
	J	ob ID 7	5011000000	3jhQ				Status	Closed			Total Processing Time (ms)	105
	Submitte	d By R	achelle Hol	lman				Operation	Insert			API Active Processing Time (ms)	113
	Start	Time 9	5/2017 8:5	2 PM PST			Que	ued Batches	0			Apex Processing Time (ms)	0
	End	Time 9	5/2017 8:5	2 PM PST			In Progr	ess Batches	0				
Time to Com	plete ([hh:]mr	n:ss) 0	0.00				Comple	ted Batches	1				
	0	bject A	ccount				Fa	led Batches	0				
	External ID	Field						Progress	100%				
	Content	Туре С	SV				Record	s Processed	20				
(Concurrency I		arallel				Re	cords Failed	-				
	API Ve	rsion 4	0.0					Retries	0				
				R	eload								
atches													
View Request	View Result	Batch ID		Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
					9/5/2017 8:52 PM	165	113	0	20	0	0		Complete

Figure 8-39. Bulk data load job review

17. Salesforce will also send you an email when your job is complete and will attach an error file to review any errors on your import. Some errors could include data type not matching. Another could be that Salesforce is seeing a blank row, as shown in Figure 8-40.



Figure 8-40. Email confirmation

Scheduling a Data Export

Salesforce is a cloud-based CRM and development platform that can be accessed anywhere you have an Internet connection. If there is a drop in your Internet service or you need to work offline for the time being, Salesforce allows you to export your data into a CSV file. Or, if you're like us and you like to keep a backup of your data, you can do so. You can schedule an export to run monthly (free of charge for all Salesforce editions), weekly, or daily (which may have a charge depending on the Salesforce edition), and you can have it emailed you. Or you can perform one-time exports.

1. Navigate to the Setup menu, as shown in Figure 8-41.



Figure 8-41. Navigating to the Setup area

2. In the Quick Find area, type **Data Export** (don't hit the Enter key; the option will populate as you type). Click Data Export, as shown in Figure 8-42.



Figure 8-42. Searching for Data Export

 To schedule an export, click the Schedule Export button, or to create a one-time export, click Export Now, as shown in Figure 8-43.

Monthly Export Service Data Export lets you prepare a copy of all your data in salesforce.com. From this page you can start the export process manually or s export is ready for download you will receive an email containing a link that allows you to download the file(s). The export files are als after which time they are deleted.	
export is ready for download you will receive an email containing a link that allows you to download the file(s). The export files are also	
Next scheduled export: None	

Figure 8-43. Monthly export service options

4. To schedule the export, choose what frequency the export should be delivered at. For a monthly export, you can choose what day of the month it should be delivered on, or the first, second, third, fourth, or last specific day of the week. You can also choose when the schedule starts, ends, and what time it should start, as shown in Figure 8-44.

Frequency	On day 1 ▼ of every month On the 1st ▼ Sunday ▼ of every month
	9/5/2017 [9/5/2017] 10/5/2017 [9/5/2017]
	Exact start time will depend on job queue activity.

Figure 8-44. Frequency

Note The start time doesn't ensure that it will be delivered at that time. Depending on the amount of data you have, it can take up to several hours to complete.

5. You can choose to include images, documents, attachments, Salesforce files, and CRM content document versions with your export by selecting the boxes at the top of the page, as shown in Figure 8-45.

Schedule Data Export	
Schedule Data Export	Save Cancel
Export File Encoding	ISO-8859-1 (General US & Western European, ISO-LATIN-1) V
Include images, documents, and attachments	
Include Salesforce Files and Salesforce CRM Content document versions	
Replace carriage returns with spaces	2

Figure 8-45. Choosing what to include

6. You can also select specific objects to be exported only, or you can choose the option at the top-right corner to have all data included, as shown in Figure 8-46.

Action	File Name	File Size
download	WE_00D110000002uILUAY_1.ZIP	55.3K

Figure 8-46. Objects to export

- 7. Once the export is all set, click the Save button.
- 8. If you have scheduled your export, you should see a yellow box with the time your next scheduled export should run, as shown in Figure 8-47. If the export is scheduled for now, there will be a note for who scheduled, what time, and in what format the information will be received in, as shown in Figure 8-48.



Figure 8-47. Export now response

	Your export has been queued. You will receive an email notification when it is completed.
Scheduled By	Rachelle Hoffman
Schedule Date	9/5/2017
Export File Encoding	ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Figure 8-48. Export scheduled response

9. Once the export is ready, Salesforce will email you with a link to the data export in the Setup menu, as shown in Figure 8-49.



Figure 8-49. Email sent from Salesforce that your email has been received

 Here the download hyperlink will need to be clicked to download the file that will then need to be stored on a machine, as shown in Figure 8-50.



Figure 8-50. In the email received, there will be a link that will direct you back in Salesforce to download your file

11. It will be downloaded to a zip file that will need to be unzipped for your use. All objects will be broken out into individual CSV files, as shown in Figure 8-51.

	Compressed Folder Tool	WE_00D1I0000002ulLUAY_1					
ile Home Sha	re View Extract						
→ · ↑ 🖡 > 1	This PC > Downloads > WE_00D11000	0002uILUAY_1					
	Name	Туре	Compressed size	Password	Size	Ratio	Date modified
Quick access	Account	Microsoft Excel Comma S	3 KB	No	19 KB	85%	9/6/2017 5:15 AI
Desktop 📌	AccountContactRole	Microsoft Excel Comma S	1 KB	No	1 KB		9/6/2017 5:15 A
🕹 Downloads 🖈	ActionLinkTemplateBinding	Microsoft Excel Comma S	1 KB	No	1 KB		9/6/2017 5:15 A
Documents *	Announcement	Microsoft Excel Comma S	1 KB	No	1 KB		9/6/2017 5:15 A
Pictures 🖈	Asset	Microsoft Excel Comma S	1 KB	No	1 KB	44%	9/6/2017 5:15 A
🛆 Google Drive 🖈	AssetRelationship	Microsoft Excel Comma S	1 KB	No	1 KB		9/6/2017 5:15 A
-	AssistantInteraction	Microsoft Excel Comma S	1 KB	No	1 KB	35%	9/6/2017 5:15 A
Chap 5	AssistantProgress	Microsoft Excel Comma S	1 KB	No	1 KB		9/6/2017 5:15 A
Chap 8	BusinessProcess	Microsoft Excel Comma S	1 KB	No	1 KB	30%	9/6/2017 5:15 A
Images	Campaign	Microsoft Excel Comma S	1 KB	No	3 KB		9/6/2017 5:15 A
📑 images	CampaignMember	Microsoft Excel Comma S	1 KB	No	1 KB	37%	9/6/2017 5:15 A
Des Drive		Microsoft Excel Comma S	1 KB	No	1 KB		9/6/2017 5:15 A
OneDrive	Case	Microsoft Excel Comma S	2 KB	No	12 KB	87%	9/6/2017 5:15 A
This PC	CaseComment	Microsoft Excel Comma S	1 KB	No	1 KB		9/6/2017 5:15 A
Desktop	CaseContactRole	Microsoft Excel Comma S	1 KB	No	1 KB		9/6/2017 5:15 A
Documents	CaseHistory2	Microsoft Excel Comma S	1 KB	No	4 KB		9/6/2017 5:15 A
Downloads	CaseSolution	Microsoft Excel Comma S	1 KB	No	1 KB	25%	9/6/2017 5:15 4
	CleanFactFieldClaim	Microsoft Excel Comma S	1 KB	No	1 KB		9/6/2017 5:15 4
Music	CollaborationGroupRecord	Microsoft Excel Comma S	1 KB	No	1 KB	33%	9/6/2017 5:15 A
Pictures	ComponentResponseCache	Microsoft Excel Comma S	2 KB	No	9 KB		9/6/2017 5:15 A
Videos	Contact	Microsoft Excel Comma S	4 KB	No	22 KB		9/6/2017 5:15 A
Local Disk (C:)	ContentFolder	Microsoft Excel Comma S	1 KB	No	1 KB		9/6/2017 5:15 A
FreeAgent Drive	ContentVersion	Microsoft Excel Comma S	1 KB	No	1 KB	56%	9/6/2017 5:15 A
DVD RW Drive (I	Contract	Microsoft Excel Comma S	1 KB	No	1 KB		9/6/2017 5:15 A
O DAD KAI DIME (I	ContractContactRole	Microsoft Excel Comma S	1 KB	No	1 KB	39%	9/6/2017 5:15 A
FreeAgent Drive (Microsoft Excel Comma S	1 KB	No	1 KB	39%	9/6/2017 5:15 A
Network	DatacloudPurchaseUsage	Microsoft Excel Comma S.,	1 KB	No	1 KB	35%	9/6/2017 5:15 A
Network	EmailDisclaimer	Microsoft Excel Comma S	1 KB	No	1 KB		9/6/2017 5:15 A
Homegroup		Microsoft Excel Comma S		No	1 KB	46%	9/6/2017 5:15 A
	EmailMessage	Microsoft Excel Comma S Microsoft Excel Comma S	1 KB 1 KB	No	1 KB		9/6/2017 5:15 A
	Endorsement	Microsoft Excel Comma S	1 KB	No	1 KB	45%	9/6/2017 5:15 A
	EntityHistory	Microsoft Excel Comma S Microsoft Excel Comma S	1 KB	No	1 KB		9/6/2017 5:15 A
	EntitySubscription	Microsoft Excel Comma S Microsoft Excel Comma S	1 KB	No	1 KB		9/6/2017 5:15 A
	Event	Microsoft Excel Comma S Microsoft Excel Comma S	1 KB	No	1 KB		9/6/2017 5:15 A
	EventDeliveryData	Microsoft Excel Comma S Microsoft Excel Comma S	1 KB	No	1 KB		9/6/2017 5:15 A
	EventParameterData	Microsoft Excel Comma S	1 KB	No	1 KB		9/6/2017 5:15 A
	EventRelation	Microsoft Excel Comma S Microsoft Excel Comma S	1 KB	No	1 KB		9/6/2017 5:15 A
	EventSubscriptionData	Microsoft Excel Comma S Microsoft Excel Comma S	1 KB	No	1 KB		9/6/2017 5:15 A 9/6/2017 5:15 A
		Microsoft Excel Comma S Microsoft Excel Comma S	1 KB	No	1 KB		9/6/2017 5:15 A
	EventSubscriptionHandleData	Microsoft Excel Comma S Microsoft Excel Comma S		No	1 KB		9/6/2017 5:15 A 9/6/2017 5:15 A
	ExchangeUserMapping	Microsoft Excel Comma S Microsoft Excel Comma S	1 KB				9/6/2017 5:15 A 9/6/2017 5:15 A
	FeedComment		1 KB	No	1 KB		
	FeedFieldHistory	Microsoft Excel Comma S	1 KB	No	5 KB		9/6/2017 5:15 A
	FeedMute	Microsoft Excel Comma S	1 KB	No	1 KB	33%	9/6/2017 5:15 A

Figure 8-51. Shows all objects broken out into individual CSV files

Duplicating Data Management

Another great feature in Salesforce is the ability to set up duplicate rules. Duplicate rules allow you to create criteria that will be checked against any new account, contact, or lead and prevent a user from creating a duplicate record. Salesforce comes out of the box with the following duplicate rules:

- *Standard Account Duplicate Rule*: Will verify if the new account being created matches any of the following combinations of account fields to an existing account:
 - a. Account Name and Billing Street
 - b. Account Name and City and State
 - c. Account name and Zip code
 - d. Account name and Phone
 - e. Account Website and Phone
 - f. Account Website and Billing Street
- *Standard Contact Duplicate Rule*: Will verify if the new contact being created matches any of the following combinations of contact fields to an existing contact:
 - a. First Name and Last Name and Title and Account Name
 - b. First Name and Last Name and Email
 - c. First Name and Last Name and Phone and Company Name
 - d. First Name and Last Name and Mailing Street and (City or Zip code or Phone)
 - e. First Name and Last Name and Mailing Street and Title
 - f. First Name and Last Name and Title and Email
 - g. First Name and Last Name and Phone
- *Standard Lead Duplicate Rule*: Will verify if the new lead being created matches any of the following combinations of lead fields to an existing lead:

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- a. First Name and Last Name and Title and Account Name
- b. First Name and Last Name and Email
- c. First Name and Last Name and Phone and Company Name
- d. First Name and Last Name and Mailing Street and (City or Zip code or Phone)
- e. First Name and Last Name and Mailing Street and Title
- f. First Name and Last Name and Title and Email
- g. First Name and Last Name and Phone

If the standard rules don't work for your company, you can also create your own. For example, perhaps you have another combination of fields that would work better for account duplication rules. Maybe your business can match an account based on the account name and a custom field you are collecting. To create a new rule, follow these steps:

1. Go to your Setup menu and search for *Duplicate Rules*. Click Duplicate Rules, as shown in Figure 8-52.



Figure 8-52. Selecting Duplicate Rules

2. From the New Rule drop-down, choose the object, in this example Account, as shown in Figure 8-53.

II Duplicate Rules							Help for this Page
What Are Duplicate Rules?	2						(Expan
ew: All Duplicate Rules V			(
ew: All Duplicate Rules V	Description	New Rule Account	Î	2 FIGIHIIJKILM		Q R S T U V	V W X Y Z Other
	Description Identify accounts that duplicate other accounts.		A	2			
Rule Name +		Account Contact	->-	Ratching Rule	Active	Last Modified By	Last Modified Date

Figure 8-53. New account rule

- 3. Name your duplicate rule.
- 4. Add a description.
- 5. Set the record-level security. This option only affects users who have sharing rules.
 - a. "Enforce sharing rules" means that if your users have limited visibility with accounts they don't own, they won't be able to see the other account that is matching to this newly created account.
 - b. "Bypass sharing rules" means that you are allowing the user to see the account they don't own if the matching rule is activated.
- 6. In the Actions section, you can choose to allow the user to create or edit an account although the duplicate rule check was activated. The other option is Block, which will prevent the user from saving the record. You can also choose to alert them with a message from the alert box. The report option includes the duplicated account/contact/lead into a list view, as shown in Figure 8-54.

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Duplicate Rules	
New Duplicate Rule Account	
Duplicate Rule Edit	Save Save & New Cancel
Rule Details	3
Rule Name Description	Account Duplicate Rule
Object Record-Level Security	Account Enforce sharing rules Bypass sharing rules
Actions	
Specify what happens when a user trie Action On Create Action On Edit	Allow V Alert Report
Alert Text	Use one of these records?

Figure 8-54. Duplicate rule, steps 3 to 6

7. You can choose a preexisting matching rule you've created or you can pick from the drop-down Create New Matching Rule, as shown in Figure 8-55.



Figure 8-55. Creating a new matching rule

8. Click Save Duplicate Rule, as shown in Figure 8-56.

Create New Matc	hing Rule		
Save your duplicate ru	le and we'll redirect you to cre	eate your new matching rule.	
	Save Duplicate Rule	Cancel	

Figure 8-56. Saving your duplicate rule

- 9. Name your matching rule and hit the Tab key to have Salesforce create the unique name.
- 10. Add a description to your matching rule.
- 11. The matching criteria section is where you create the rule itself. From the column fields, choose the field that you'll use as part of your matching rule. In this example, you have the account name. In Matching Method, you can have the option of Exact or for some fields Fuzzy. The method Fuzzy will strip the account name of *Inc* or *Corporation* and see if it can match two accounts without these in the name. The Fuzzy method changes per field; to see a full list of these methods, go to https://help.salesforce.com/ and search *matching methods used with matching rules*.
- 12. Select Match Blank Fields to allow your criteria to match the fields if they are blank. For example, if the account names are the same for the records and the custom field on both is blank and these were both checked, the criteria would match, and your user would be alerted. I suggest using exact values and also matching blank fields.
- 13. You can also choose if the filter logic should include all the previous fields with the word AND or if it should include some but not all with the word OR.
- 14. Click Save, as shown in Figure 8-57.

Accou			Help for this Pa
Step 2:	Configure Matching Rule		Step 2 o
			Previous Save Can
Rule D	Details		= Required Informatio
	Object	Account	
	Rule Name	Account Duplicate Rule ma	
	Unique Name	Account_Duplicate_Rule_m	
	Description	Account name + Custom field	
	10	•	A
		•	
Matchi	ing Criteria		
		and how.	
	ing Criteria	and how.	<i>.</i>
	ing Criteria	12	A
Tel	ing Criteria	Matching Method Match Blank Fields	£
Tel	Ing Criteria	Matching Method 1 Match Blank Fireds 1	
Tel	Ing Criteria If the rule which fields to compare Field Account Name Tradestyle	Matching Method ; Match Blank Fields ; V Exact V	
Tel	Ing Criteria If the rule which fields to compare Field Field Cradestyle Cradestyle Compare Field	Matching Method 1 Match Blank Fields 1 Exact V V V	
Tel	Il the rule which fields to compare Field 1. Account Name 2. Tradestyle 3None 4None	Matching Method s T Exact T	
	Ing Criteria If the rule which fields to compare Field Field TradestyleNone	Matching Method 1 Match Blank Fireds 1 Y Exact Y	
	Ing Criteria If the rule which fields to compare Field Field Tradestyle None	Matching Method s T Exact T	
Tel	Ing Criteria If the rule which fields to compare Field I. Account Name 2. Tradestyle 3None- 4None- 5. Rog Remove Row Ex Filter Loois Fields	Matching Method () V Exact Exact	
Tel	Ing Criteria If the rule which fields to compare Field If Account Name Tradestyle If T	Matching Method 1 Match Blank Fireds 1 Y Exact Y	
Tel	Ing Criteria If the rule which fields to compare Field I. Account Name 2. Tradestyle 3None- 4None- 5. Rog Remove Row Ex Filter Loois Fields	Matching Method () V Exact Exact	14

Figure 8-57. Creating the matching rule

15. Make sure to activate your matching rule by clicking the Activate button, as shown in Figure 8-58.

Matching Rules	
Matching Rule Account Duplicate Rul	e matching rule
Matching Rule Detail	Edit Delete Clone Activate
Object	Account
Rule Name	Account Duplicate Rule matching rule
Unique Name	Account_Duplicate_Rule_matching_rule
Description	Account name + Custom field
Matching Criteria	(Account: Name EXACT MatchBlank = TRUE) AND (Account: Tradestyle EXACT MatchBlank = TRUE
Status	Inactive
Created By	Rachelle Hoffman, 9/6/2017 7:35 PM Modified By

Figure 8-58. Activating your matching rule

 Go back to the duplicate rules area (see step 1), click the name of the rule created, and activate the duplicate rule, as shown in Figure 8-59.

Duplicate Rules							
Account Duplicate Rule Account Duplicate Rul	e			16			🖨 Help for this Page 🥑
Duplicate Rule Detail		Edit De	elete Cla	one Activate			
Rule Name	Account Duplicate Rule				Order	2 of 2 [Reorder]	
Description	Account duplication for n	ame and cus	stom field				
Object	Account						
Record-Level Security	Bypass sharing rules						
Action On Create	Allow				Operations On Create	✓ Alert ✓ Report	
Action On Edit	Allow				Operations On Edit	✓ Alert ✓ Report	
Alert Text	Use one of these records	7					
Active							
Matching Rule	Account Duplicate Ry	le matching	rule 📀	Mapped	Matching Criteria	(Account: Name EXACT & Tradestyle EXACT Match	tatchBlank = TRUE) AND (Account: Blank = TRUE)
Conditions							
Created By	Rachelle Hoffman, 9/6/20			one Activate	Modified By	Rachelle Hoffman, 9/8/2017	7:44 PM

Figure 8-59. Activating your duplicate rule

Mass Deleting Records

Salesforce offers a Mass Delete Records option for accounts, leads, activities, contacts, cases, solutions, products, and reports. This option is especially important because it allows you to clean up your database. If you allow or do not maintain your Salesforce CRM and leave records in it that mean nothing to you or your employees, you end up with "dirty data." A CRM with dirty data is just about as useless as not having a CRM. Remember, your CRM is only as good as the data you have in it. Hence, Salesforce gives you a tool to mass delete. For example, say you just went to a conference and captured all new leads, so you went ahead and imported them. However, after reviewing your import, you realized it was the wrong list and an old one at that. You need to delete these! The next couple steps will help you clean your database:

1. Go to your Setup menu and search for *Mass Delete Records*. Click Mass Delete Records, as shown in Figure 8-60.



Figure 8-60. Finding Mass Delete Records

 Click the option for the objects you want to delete the records from. In the previous example, it was Leads, as shown in Figure 8-61.



Figure 8-61. Mass delete record choices

3. Determine the criteria of the data that needs to be deleted. In this example, we know the created date was yesterday. Or perhaps the lead source was the specific conference. Almost any field on the object can be used as the criteria to find the records that need to be deleted.

- 4. In the first column, select the field.
- 5. In the second column, choose the method.
- 6. In the third column, enter your value.
- 7. Click Search, as shown in Figure 8-62.

						Help for this P
* Step 1: Review what	at will happ	pen when you r	mass	delete your Leads:		
This screen allows you to o • All Activities as: Once data is deleted, it will	ssociated wit	th the Leads		e.com. The following o	ata will also be deleted:	
		or to make dala	etina:			
 Step 2: Recommend We strongly recommend you 	you run a rep	port to archive you	ur data			
	you run a rep to request a nd available	a wee	ur data kly exp cost wi	port of your data before th Professional Edition	running mass delete. The w	reekly export service is incl more information.
We strongly recommend you It is also strongly advised to with Enterprise Edition, and	you run a rep to request a nd available that match	a wee	ur data kly exp cost wi	port of your data before th Professional Edition	Contact salesforce.com for	reekly export service is incl more information.
We strongly recommend you It is also strongly advised to with Enterprise Edition, and Step 3: Find Leads	you run a rep to request a nd available that match	5 a wee	ur data kly exp cost wi	oort of your data before th Professional Edition	6	reekly export service is incl more information.
We strongly recommend you It is also strongly advised to with Enterprise Edition, and Step 3: Find Leads Created Date	you run a rep to request a d available that match	sort to archive you 5 a wee tional of h the ollowing equals	ur data kly exp cost wi criter	oort of your data before th Professional Edition	AND	reekly export service is incl more information.
We strongly recommend you It is also strongly advised to with Enterprise Edition, and Step 3: Find Leads to Created Date None	to request a ad available that match v	a wee solution of the oblight the ollowing equals None	ur data kly exp cost wi cost wi	oort of your data before th Professional Edition	AND AND	reekly export service is incl more information.

Figure 8-62. Set up the criteria to find the records needing to be deleted

- 8. Select the records you want to delete or select the box at the top to select all the records.
- 9. Select the box Permanently Delete if you are sure you never want to retrieve these again.

Note Deleted records go to your recycle bin and will autodelete after 15 days, or if your recycle bin is full, the oldest record will be deleted.

10.	Click the Delete button when you are ready to delete the records,
	as shown in Figure 8-63.

70,	Permanently de	lete the selected records.	When this optic	on is selected, you cannot restore deleted	records from t	he Recycle Bir	Please be c	areful when selectin	g this optic	m.	
				10	Delete						
8	Name	Company	State/Province	Email	Lead Status	Created Date	Owner Alias	Unread By Owner	Converted	Created By Alias	Last Modified By A
	Akin, Kristen	Aethna Home Products	VA	kakin@athenahome.com	Working - Contacted	9/1/2017	RHoff	1		RHoff	RHoff
2	Bair, Betty	American Banking Corp.	PA	bblair@abankingco.com	Working - Contacted	9/1/2017	RHoff	~		RHoff	RHoff
6	Boxer, Bertha	Farmers Coop. of Florida	FL	bertha@foof.net	Closed - Converted	9/1/2017	RHoff		~	RHoff	RHoff
6	Braund. Mike	Metropolitan Health Services	MD	likeb@metro.com	Open - Not Contacted	9/1/2017	RHoff	1		RHoff	RHoff
8	Brownell. Shelly	Western Telecommunications Corp	CA	shellyb@westerntelecom.com	Working - Contacted	9/1/2017	RHoff	~		RHoff	RHoff
6	Cotton. Phylia	Abbott Insurance	VA	pcotton@abbottins.net	Open - Not Contacted	9/1/2017	RHoff	1		RHoff	RHoff
	Crenshaw, Carolyn	Ace iron and Steel Inc.	AL	carolyno@aceis.com	Closed - Not Converted	9/1/2017	RHoff	1		RHoff	RHoff
	Dadio Jr. Bill	Zenith Industrial Partners	он	bill dadio@zenith.com	Closed - Not Converted	9/1/2017	RHoff	1		RHoff	RHoff
6	Eberhard, Sandra	Highland Manufacturing Ltd.	CA	sandra e@highland.net	Closed - Converted	9/1/2017	RHoff		1	RHoff	RHoff
	Feager, Patricia	International Shipping Co.	NC	patricia feager@is.com	Closed - Converted	9/1/2017	RHoff		1	RHoff	RHoff
6	Gimpse.	Jackson Controls		jeffo@jackson.com	Closed - Converted	9/1/2017	RHoff		~	RHoff	RHoff
6	James, Tor	n Delphi Chemicals	MN	tom james@delphi chemicals.com	Working - Contacted	9/1/2017	RHoff	1		RHoff	RHoff
6	Luce. Eugena	Pacific Retail Group	MA	eluce@pacificretail.com	Closed - Not Converted	9/1/2017	RHoff	1		RHoff	RHoff
	Maccieod, Violet	Emerson Transport	GA	violetm@emersontransport.com	Closed - Converted	9/1/2017	RHoff		1	RHoff	RHoff
6	May, Norm	Greenwich Media	он	norm may@oreenwich.net	Working - Contacted	9/1/2017	RHoff	1		RHoff	RHoff
6	Moolure, Brenda	Cadinal Inc.	1L	brenda@cardinal.net	Closed - Converted	9/1/2017	RHoff		1	RHoff	RHoff
6	Monaco, David	Blues Entertainment Corp.		david@blues.com	Working - Contacted	9/1/2017	RHoff	1		RHoff	RHoff
6	Owenby Pamela	Hendrickson Trading	PA	pam_owenby@hendricksontrading.com	Closed - Not Converted	9/1/2017	RHoff	~		RHoff	RHoff
	Rogers.	Burlington Textiles			Closed -	0100017	Dilet			0.145	0.1.0

Figure 8-63. Mass deleting your records

Note You can only mass delete 250 records at a time.

Mass Transferring Records

Salesforce offers a tool to help you transfer the ownership of accounts, leads, macros, or streaming channel records to another user. This allows you to transfer every record a user owns to another and can be based on the criteria of the record. This is an important tool if you have an employee who leaves your company or if one gets promoted! For example, if an employee is leaving your company and owns many accounts that now need to be managed by another employee, you can use this tool to transfer those accounts to new users.

1. Go to your Setup menu, search for *Mass Transfer Records*, and click the phrase, we shown in Figure 8-64.



Figure 8-64. Searching for Mass Transfer Records in the Setup menu

2. In the example presented in the introduction of this section, you need to transfer accounts from one departing user to another user. To do this, click the Transfer Accounts link, as shown in Figure 8-65.



Figure 8-65. Transfer Account Records screen

- 3. Using the magnifying glass icon, search for the user you want to transfer the ownership of the records from.
- 4. Using the magnifying glass icon, search for the user you want to transfer the ownership of the records to.

5. It is a general rule that you shouldn't transfer records that are closed or completed from one user to another. We recommend that you keep the history of your business this way. Therefore, in Figure 8-66, you'll see we only select "Transfer open opportunities" and "Transfer open cases."

		Help for this Page 🧐
is screen allows you to trans lowing records related to the	fer an account from one user to another. When you transfer ownership transferred account:	of an account, the new owner will also gain ownership of the
 All contacts that bell All opportunities (ind All open activities at 	ng to the existing owner. ong to the existing owner. cluding closed opportunities if you select the Transfer closed opportunit segment to the existing owner. Note that completed activities will not be ht need to edit sharing.	
Mass Transfer Accounts	s <u>3</u>	= Required Information
Transfer from		
transier nom	Bachelle Hoffman	
Transfer to	ities not owned by the existing account owner	
Transfer to Transfer open opportuni Transfer closed opportu	Tyson Jones ties not owned by the existing account owner nities med by the existing account owner 6b 6c	
Transfer to Transfer open opportuni Transfer closed opportu Transfer open cases ow Transfer closed cases	Tyson Jones ties not owned by the existing account owner nities med by the existing account owner e following criteria: • equals • Customer - Channel AND	
Transfer to Transfer open opportuni Transfer closed opportuni Transfer open cases ow Transfer closed cases Find accounts that match th	Tyson Jones ties not owned by the existing account owner nities med by the existing account owner e following criteria: • equals • equals •None • ANC	5
Transfer to Transfer opportuni Transfer closed opportu Transfer open cases ow Transfer closed cases Find accounts that match th Type	Tyson Jones ties not owned by the existing account owner nities med by the existing account owner e following criteria: T -None T T	
Transfer to Transfer open opportuni Transfer closed opportu Transfer closed cases Transfer closed cases Find accounts that match the Type None	Tyson Jones ties not owned by the existing account owner nities med by the existing account owner e following criteria: ▼ equals ▼None ▼ Customer - Channel ANC	

Figure 8-66. Setting up the mass transfer of records

6. If you want all records that one user owns transferred to the other, you can leave this section blank. Otherwise, if you want to transfer only specific records based on the criteria of the record, you'll need to use this section. Notice that you can only use the logic AND. This means that every set of criteria you build here will have been on the record it is a search for. For example, if you set the Type field to Customer – Channel and Billing State to California, this will require that the record has both of these values for it to be available to transfer.

- a. Find the field that you want to filter from. For example, if you use a Type field on the account and you only want to transfer specific types of accounts to the new user.
- b. Use the appropriate method: equals, contains, less than, greater than, and so on. In this example, we only want specific types of accounts, so we use "equals."
- c. Enter the value that the criteria should be. In this example, it is the Type of accounts that equal Customer Channel.
- 7. Once you have completed your criteria, click the Find button to find the records that match the criteria, as shown in Figure 8-66.
- 8. Use the check box found in the headers to select all the records to transfer or single select the users with the check box found next to the account name.
- 9. Once you have selected all the records, click the Transfer button, as shown in Figure 8-67.

		9	Transfer	Cancel			
T	Account Name Acco	ount Site Billing State/Province	Phone	Туре	Account Owner Alias	Created By Alias	Last Modified By Alias
	Cadinal Inc.	IL	(847) 262-5000	Customer - Channel	RHoff	RHoff	RHoff
۲	Dickenson plc	KS	(785) 241-6200	Customer - Channel	RHoff	RHoff	RHoff
۲	Emerson Transport	GA	(770) 395-2370	Customer - Channel	RHoff	RHoff	RHoff
	Express Logistics and Transport	OR	(503) 421-7800	Customer - Channel	RHoff	RHoff	RHoff
	GenePoint	CA	(650) 867-3450	Customer - Channel	RHoff	RHoff	RHoff
	Highland Manufacturing Ltd.	CA	(828) 440-0700	Customer - Channel	RHoff	RHoff	RHoff
۲	Jackson Controls		888-2-25474189	Customer - Channel	RHoff	RHoff	RHoff
	Pyramid Construction Inc.		(014) 427-4427	Customer - Channel	RHoff	RHoff	RHoff

Figure 8-67. Selecting the records to transfer

Once complete, you should get the record count of the transferred records, as shown in Figure 8-68.

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		Find					
8 Accounts transf	ferred						
				Transfer	Cancel		
Account Name	Account Site	Billing State/Province	Phone	е Туре	Account Owner Alias	Created By Alias	Last Modified By Alias
No records to disp	lay.						

Figure 8-68. Record count of transferred records

Summary

Salesforce offers so many tools right at your fingertips. With all the data tools presented, you shouldn't have any issues with dirty data. If you let dirty data get out of control, it can become a burden to you and your users. With the proper tools at hand, you'll never have a reason to let it get this way.

CHAPTER 9

Security Overview

Salesforce is committed to running the most secure cloud platform. Protecting data integrity and privacy is at the forefront of Salesforce's business model. Salesforce approaches security with a multitiered architecture, which supports greater flexibility and protection. System administrators have complete control over the level of access delivered to end users. You can protect sensitive information and manage end user accessibility with profiles, permission sets, field-level security, sharing rules, and more. Visit the Salesforce Trust web site at http://trust.salesforce.com (Figure 9-1) for transparent access to security threats and advisories.



Figure 9-1. Salesforce Trust web site

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Salesforce Security Model

Controlling the level of access to your Salesforce organization is vital to ensuring client and data protection. While Salesforce is committed to the highest levels of data protection, your system administrator should configure the security settings to make the system as secure as possible. Design a security plan by considering what the primary risks to your data are and then learn about the Salesforce sharing architecture and its components to properly configure your security settings.

Fundamentals Data can be secured and layered at different levels in Salesforce. Access is secured in three ways: at the object level, at the field level, and at the record level. In database terms, an object is a table. *Objects* hold groupings of information that may be related. This includes the records that live in them. *Records* are the rows of information that are found within a table.

Accounts, contacts, and opportunities are just a few examples of standard Salesforce objects. Figure 9-2 shows a list view of account records in the account object. Cloud Creations HQ is an example of an account record in the Account object, as shown in Figure 9-2.



Figure 9-2. Identifying objects, records, and fields

Each record stores key pieces of information. These are called *fields*. In database terms, fields are the columns found within a table. In Figure 9-2, Account Name, Account Site, and Phone are all examples of fields in an account record. Refer to Figure 9-2 to identify the difference between objects, records, and fields.

Profiles and Permission Sets

Profiles contain a collection of settings for determining what a user or group of users can see and do in Salesforce. A permission set contains the same collection of administrative settings but can be assigned to an individual user or groups of users as an extra layer of permission.

Note Rather than create countless profiles to assign the appropriate settings and permissions for an individual user, it is best practice to assign a permission set.

Profiles

All users must be assigned a profile, and profiles can be assigned to multiple users. However, users can be assigned only one profile. Typically, profiles are assigned to users by their job function. This is usually because those with the same job description often require similar levels of access.

For example, you may have different security requirements for your marketing users, service agents, sales reps, and developers. It's recommended that you create or modify profiles to meet their specific requirements.

Profile Home Page

We suggest familiarizing yourself with the different profile settings on the profile home page. This page is broken down into the following permissions and settings.

Console Settings

Click Edit to control the console settings for each profile (shown in Figure 9-3).

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Console Setti	ngs
Console Layout	[<u>Edit</u>]

Figure 9-3. Console Settings

Page Layouts

Page layouts can be configured for each profile. Click View Assignment next to each desired object to configure a different page layout for a profile (shown in Figure 9-4).

age Layouts			
Standard Object Layou	uts		
Global	<u>Global Layout</u> [<u>View Assignment</u>]	Goal Link	<u>Goal Link Layout</u> [<u>View Assignment</u>]
Email Application	Not Assigned [<u>View Assignment</u>]	Group	Group Layout [View Assignment]
Home Page Layout	DE Default [<u>View Assignment</u>]	ldea	Varies by Record Type [<u>View Assignment</u>]
Account	Account Layout [View Assignment]	Job Tracker	Job Tracker Layout - Winter '16 [View Assignment]
Asset	Asset Layout [View Assignment]	Lead	Lead Layout [<u>View Assignment</u>]
Campaign	Campaign Layout	Macro	Macro Layout

Figure 9-4. You can control page layouts for each object at the profile level.

Field-Level Security

Once object-level access and record-level access are granted, you can control what fields are visible at the profile level. Navigate to the field level and click View next to the desired object to control the level of access that a profile should have to a field. Once you click View, you will see a list of all fields related to that object and the current field-level permissions. Click Edit to make changes to the appropriate field (shown in Figure 9-5).

Edit Back to Profile		
Field Type	Read Access	Edit Access
Name	1	1
Text	1	1
Lookup	1	✓
Text	1	~
Picklist	1	1
Picklist	1	1
	Name Text Lookup Text Picklist	Name ✓ Text ✓ Lookup ✓ Text ✓ Picklist ✓

Figure 9-5. Field-level security at the account level

Click Read Access to make a field visible. Select Edit Access to allow users to view and edit a field. Deselect Read Access and Edit Access to make a field hidden.

Let's look at an example. Say Michael Scott Paper Co. uses Salesforce to track sales and accounting information. However, the CEO, Michael Scott, does not want sales representatives to see sensitive financial information such as credit card and Social Security numbers.

To solve this, create a profile for sales representatives and another profile for accounting. For each profile, click View Assignment next to the account and edit the field security. For the sales representatives profile, deselect Read Access and Edit Access in the Credit Card and Social Security fields. This will hide both fields from users assigned to the sales representative profile. Log in as a user assigned to the sales representative profile to test your work.

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App and Tab Settings

Specify what apps are visible and set the default in the Custom App Settings section of the profile (shown in Figure 9-6).

Standard Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	~	~	~	~		
Assets	~	~	1	~		
Campaigns	1					
Cases	1	~	1			
Coaching	1	~	~			
Contacts	1	1	1	~		
Contracts	1	~	1	1		
D&B Companies	1					
Documents	1	~	1	~		
Duplicate Record Sets						
Feedback	1	~	1			
Feedback Questions	1	~	1			
Feedback Question Sets	1	~	1			
Feedback Requests	1	~	1			
Feedback Templates	1	1	1			

Figure 9-6. Custom App Settings area in a profile

Record Type Settings

Record types can be assigned at the profile level. For objects with record types, add the record type next to the appropriate object.

Administrative and General User Permissions

Profiles have two types of permissions: Administrative and General, as shown in Figures 9-7 and 9-8. Familiarize yourself with the granular types of permissions so you can better administer a secure organization.

Access Chatter For SharePoint		Manage Knowledge Article Import/Export	
Access Community Management		Manage Letterheads	
Access Libraries	✓	Manage Lightning Sync	
Add People to Direct Messages		Manage Login Access Policies	
Allow Inclusion of Code Snippets from UI		Manage Macros Users Can't Undo	1

Figure 9-7. Administrative Permissions section located in a profile

General User P	ermissions		
Activate Contracts		Lightning Login User	
Activate Orders		Manage Articles	
Allow View Knowledge	\checkmark	Manage Cases	
Assign Topics	✓	Manage Connected Apps	
Connect Organization to Environment Hub		Manage Content Permissions	

Figure 9-8. General User Permissions section at the profile level

Object-Level Security

Object-level security is stored at the profile level in the Object Permissions section. As a starting point, a user must have the appropriate level of access to an object to see the object and the records inside of it. You can control object-level security in profiles, as shown in Figure 9-3.

The following are different permission types used to set the level of access users have with each object:

- *Read*: Users can view records.
- *Create*: Users can create records.
- *Edit*: Users can read and edit records stored in this object.
- *Delete*: Users have permission to read, edit, and delete records.
- *View All*: Users can view all records stored within this object.
- *Modify All*: Users can modify all records stored within this object.

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Set the object-level security for standard and custom objects. Define whether a profile should have Read, Create, Edit, Delete, View All, or Modify All, as shown in Figure 9-9.

Standard Object Permissions						
	Basic Acce	ss			Data Admin	istration
	Read	Create	Edit	Delete	View All	Modify Al
Accounts	~	~	~	~		
Assets	~	~	~	~		
Campaigns	~					
Cases	~	~	1			
Coaching	~	~	~			
Contacts	~	1	1	1		
Contracts	1	~	1	1		
D&B Companies	~					
Documents	~	~	1	1		
Duplicate Record Sets						
Feedback	~	~	1			
Feedback Questions	~	~	1			
Feedback Question Sets	~	~	1			
Feedback Requests	~	~	1			
Feedback Templates	1	~	1			

Figure 9-9. Setting object-level security

Password Policies, Login Hours, and IP Ranges

You can specify when passwords should expire, password requirements, session timeouts, and much more. You can also control the login hours and acceptable IP ranges for each profile.

Assigning a Profile

There are six different types of standard profiles:

- *System Administrator*: Assign this profile to a user who needs access to all functionality within license. This profile has access to view and modify all data.
- *Standard User*: This profile has core platform functionality. They can view, edit, and delete records they have access to.
- *Solution Manager*: This is the same functionality as a Standard User plus additional permissions to manage published solutions.
- *Marketing User*: This is the same functionality as a Standard User plus permission to import leads, manage campaigns, and manage communication templates.
- *Contract Manager*: This is the same functionality as a Standard User plus permission to manage and approve contracts.
- *Read Only*: This profile can only view records they have access to and run reports and export.

Create a Custom Profile

Create custom profiles to build a unique set of permissions for different groups of users. Follow these steps to create a custom profile:

 Search for and select Profiles from the Setup menu (shown in Figure 9-10).

Setup	•	H <mark>o</mark> me	Object M	anager 🗸		
Q profiles				Home		
∨ Users				Go Mobile	Visit	Click to Customize
Profiles -		_		Prepare the	AppExchar Extend	Use the
			<	Salesforce1	Salesforce	Object

Figure 9-10. Navigating to Profiles in Salesforce

2. To create a new profile, click New Profile, as shown in Figure 9-11.

All Profiles	Edit Delete Create Net	w View														0
New Profile	0	A B C D E F	G H I J K L M	NO	P	QF	R S	T	U	V	W	×	Y	Z	Other	All
Action	Profile Name †	User License	Custom													
Edit Clone	Analytics Cloud Inte	Analytics Cloud Integr														
Edit Clone	Analytics Cloud Sec	Analytics Cloud Integr														
Edit Clone	Authenticated Web	Authenticated Web														
Edit Clone	Authenticated Website	Authenticated Website														
Edit Clone	Chatter External User	Chatter External														

Figure 9-11. New Profile button on the Profiles home page

3. To create a custom profile, you must clone one from an existing standard profile. Choose a standard profile to clone from and click Clone.

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4. Enter the name of the new profile and click Save, as shown in Figure 9-12.

Clone Profile	
Enter the name of the new pro	ofile.
You must select an exist	ting profile to clone from.
Existing Profile User License Profile Name	Standard User Salesforce
	Save Cancel

Figure 9-12. Naming your new custom profile

To complete changes to what this profile has access to see and do, click Edit next to the profile name. Modify the appropriate permissions to your new profile, as shown in Figure 9-13.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or mo types available to users with this profile. Login IP Ranges [0] Enabled Apex Class Access [0] Enabled Visualforce Page Access [0] Enabled External Data Source A Enabled Named Credential Access [0] Enabled Service Presence Status Access [0] Enabled Custom Permissions [0] Profile Detail Edit Clone Delete Merv Users
that user's personal information. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or mo- types available to users with this profile. <u>Login IP Ranges (0) Enabled Apex Class Access (0) Enabled Visualforce Page Access (0) Enabled External Data Source A Enabled Named Credential Access (0) Enabled Service Presence Status Access (0) Enabled Custom Permissions (0)</u>
that user's personal information. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or motypes available to users with this profile. Login IP Ranges [0] I Enabled Apex Class Access [0] I Enabled Visualforce Page Access [0] I Enabled External Data Source A Enabled Named Credential Access [0] Profile Detail Edit Clone Delete Yiew Users
that user's personal information. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or mo types available to users with this profile. <u>Login IP Ranges [0] Enabled Apex Class Access [0] Enabled Visualforce Page Access [0] Enabled External Data Source A Enabled Named Credential Access [0] Enabled Service Presence Status Access [0] Enabled Custom Permissions [0]</u>
that user's personal information. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or mo types available to users with this profile. <u>Login IP Ranges [0] Enabled Apex Class Access [0] Enabled Visualforce Page Access [0] Enabled External Data Source A Enabled Named Credential Access [0] Enabled Service Presence Status Access [0] Enabled Custom Permissions [0]</u>
that user's personal information. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or mo types available to users with this profile. <u>Login IP Ranges [0] Enabled Apex Class Access [0] Enabled Visualforce Page Access [0] Enabled External Data Source A Enabled Named Credential Access [0] Enabled Service Presence Status Access [0] Enabled Custom Permissions [0]</u>
hat user's personal information. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or mo ypes available to users with this profile. <u>Login IP Ranges [0] Enabled Apex Class Access [0] Enabled Visualforce Page Access [0] Enabled External Data Source A Enabled Named Credential Access [0] Enabled Service Presence Status Access [0] Enabled Custom Permissions [0]</u>
hat user's personal information. fyour organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or mo- ypes available to users with this profile. <u>Login IP Ranges [0] Enabled Apex Class Access [0] Enabled Visualforce Page Access [0] Enabled External Data Source A Enabled Named Credential Access [0] Enabled Service Presence Status Access [0] Enabled Custom Permissions [0]</u>
hat user's personal information. fyour organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or mo ypes available to users with this profile. Login IP Ranges [0] Enabled Apex Class Access [0] Enabled Visualforce Page Access [0] Enabled External Data Source A
hat user's personal information. fyour organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or mo ypes available to users with this profile. Login IP Ranges [0] Enabled Apex Class Access [0] Enabled Visualforce Page Access [0] Enabled External Data Source A
hat user's personal information. fyour organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or mo ypes available to users with this profile. Login IP Ranges [0] Enabled Apex Class Access [0] Enabled Visualforce Page Access [0] Enabled External Data Source A
hat user's personal information. I your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or mo ypes available to users with this profile.
nat user's personal information. 'your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or mo
nat user's personal information. your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or mo
nat user's personal information.
Jsers with this profile have the permissions and page layouts listed below. Administrators can change a user's profile l
New Profile
Profile Help for t

Figure 9-13. Home page of a profile

Note All users must have an assigned profile, and profiles can be assigned to multiple users. However, users can be assigned only one profile.

So, what do you do when you need to give additional permissions to an individual user?

For example, let's say you want to extend the permission Create Reports to an individual user. Rather than creating a new profile or editing permissions on an existing profile, we suggest creating a permission set.

Permission Sets

Permission sets are a collection of permissions and settings that can be assigned to the users who need it.

Follow these steps to create a permission set:

- 1. Search Permission in Setup and click Permission Set.
- 2. Click the New button to create a new permission set, as shown in Figure 9-14.

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from th

New		A D C D E F G	H I J K L M N O P Q F
Action	Permission Set Label †	Description	License
Del Clone	Permission Set 1	Create report Folders	Salesforce
Clone	Salesforce Console User	Enable Salesforce Console	Sales Console User

Figure 9-14. Permission Sets home page

3. Enter the name of your permission set in the Label field and provide a detailed description, as shown in Figure 9-15.

efault Sharing Settings			
Organization-Wide De	Edit		Organization-Wide Defaults Help 🤇
Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Public Read/Write/Transfer	✓
Account and Contract	Public Read/Write	Public Read/Write	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	\checkmark
Opportunity	Public Read/Write	Public Read/Write	\checkmark
Quote	Controlled by Parent	Controlled by Parent	\checkmark
Case	Public Read/Write/Transfer	Public Read/Write/Transfer	\checkmark
Campaign	Public Full Access	Public Full Access	✓
	Public Read Only	Private	\checkmark
User			
User Activity	Private	Private	\checkmark

Figure 9-15. Steps to create a permission step

4. Choose the type of user who will use this permission set.

Tip It is best practice to give your permission set a description. This makes it easier to find when many permission sets exist.

Record-Level Security

Record-level security specifies what records a user has access to view and edit in each object.

Record Ownership

Each record in Salesforce must have an owner. This can be either a user or a queue. By default, the owner of a record has full access capabilities. This means they can view, edit, delete, transfer, and share the record.

Organization-wide Defaults

By default, your Salesforce organization operates in a public sharing model. We refer to this as the *organization-wide defaults* (OWDs). This means that all users have access to see and edit all data on a per-object basis, provided they have the appropriate object-level security. To limit visibility for certain records, consider operating in a private sharing model for that object.

Private or Public?

When considering to go private or public on an object, consider this: are there any elements of your data that should be restricted to any particular user?

If the answer is yes, you should be operating in a private sharing model for that object.

As shown earlier in Figure 9-2, the organization-wide default has the highest level of restriction. This is the only security component that restricts access.

All other security components are designed to share access. Record access can be opened up to specific users or groups of users through roles, manual sharing, and sharing rules.

Change Sharing Settings

To modify your organization-wide defaults, navigate to Sharing Settings in Setup.

To control the sharing settings for external users, you must first enable external sharing. Select Sharing Settings in the Setup area's Quick Find, and click Enable External Sharing.

From here, you can view the level of access both internally and externally by object, as shown in Figure 9-16.

efault Sharing Settings			
Organization-Wide D	efaults Edit		Organization-Wide Defaults Help
Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Public Read/Write/Transfer	✓
Account and Contract	Public Read/Write	Public Read/Write	✓
Contact	Controlled by Parent	Controlled by Parent	1
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Public Read/Write	✓
Quote	Controlled by Parent	Controlled by Parent	✓
Case	Public Read/Write/Transfer	Public Read/Write/Transfer	✓
Campaign	Public Full Access	Public Full Access	✓
User	Public Read Only	Private	\checkmark
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Coaching	Private	Private	
Foodbook	Driveto	Driveto	

Figure 9-16. Default organization-wide settings

External users include community users, guest users, web site users, Chatter external users, and portal users. You can split the sharing settings for each object for internal and external users.

Select Edit to change the settings to any of these options:

- *Private*: All records in this object are private and can be visible only to the record owner, role, or sharing rule.
- *Public Read Only*: All records in this object are visible as read-only records.
- *Public Read/Write Only*: All records in this object are visible and can be modified by all users.
- *Public Read/Write/Transfer*: All records in this object are visible and can be modified and transferred by all users.
- *Controlled by Parent*: Users have the same level of access on the detail of a master-detail relationship.

Select Standard Report Visibility to enable visibility to data in reports that may not be accessible because of organization-wide defaults.

Select Manual User Record Sharing to allow users to manually share a record to additional users.

Select Manager Groups to allow users to share records with their manager groups, as shown in Figure 9-17.



Figure 9-17. Additional security settings

Role Hierarchies

Once OWDs are in place to restrict data, you can use role hierarchies to open up visibility and share record access. Roles define the level of access a user or groups of users have from the top down. Record access rolls up through the hierarchy.

As an example, create a branch under Sales Managers called Sales Reps to give sales managers access to the sales reps beneath them, as shown in Figure 9-18.



Figure 9-18. Understanding the roles home page

Note When considering your role chart, keep in mind that role hierarchies aren't necessarily the same as your executive organizational chart. Typically you create roles for every level in the hierarchy, not for every position.

If a role sits above someone else in the role hierarchy tree, that role is granted the same level of access to all records that fall beneath that branch. So if the access is read-only, that same level of record access is granted.

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Creating a New Role

Use roles to define how users view and share records. The correct role structure depends on your organization's culture.

To create a role, follow these steps:

- 1. Search for *Roles* in the Quick Find box and click to navigate.
- 2. Select Set Up Roles.
- 3. Select Expand All to see Salesforce's default setup.
- 4. Click Add Role under the appropriate branch to add a branch below (refer to Figure 9-19).

Creating the Role Hierarchy	Help for this Pa	ge 🥜
You can build on the existing role hierarchy shown on this page. To insert a new role, click Add	d Role.	
Your Organization's Role Hierarchy	Show in tree view	•
CC Add Role CEO Edit Del Assian Add Role CFO Edit Del Assian Add Role COO Edit Del Assian Add Role COO Edit Del Assian Add Role COO Edit Del Assian Add Role Customer Support, International Edit Del Assian Add Role Customer Support, North America Edit Del Assian Add Role Customer Support, North America Edit Del Assian Add Role Customer Support, North America Edit Del Assian Add Role		
Installation & Repair Services Edit Del Assign Add Role		

Figure 9-19. Tree branch view expanded

- 5. Fill in the following details to successfully save a new role, as shown in Figure 9-20:
 - a. *Label*: This is the name used to title the role. Examples can include VP of Sales, Regional Managers, and so on. Press Tab to autopopulate the role name.
 - b. *Role Name*: This is the unique API name. This role reports to the name of the role above this role.

New Role				Help for	this Page
Role Edit					
Label					
Role Name		i			
This role reports to	CC	S			
Role Name as displayed on reports					

Figure 9-20. Steps to creating a new role

6. Assign users to specified roles.

By selecting to assign, you can search for unassigned users to connect them to a proper role. You can also navigate to a user's profile and select Edit to assign a role.

Sharing Rules

You can use sharing rules to give roles, groups, or individual users access to data that they may be excluded from. Sharing rules can be used to override the existing security restrictions.

Public Groups

Groups can be created to simplify sharing and security. This can include a combination of individuals, users with specific roles, or members of other public groups.

Creating a Public Group

Before creating a sharing rule, you must create a public group. Follow these steps to create a public group:

- 1. Search for *Public Groups* in the Quick Find box.
- 2. Click New or set View to All to see a list of existing groups (Figure 9-21).

Public Grou	ps		Help for this Page 😢
public group is a s	et of users. It can contain individ	ual users, other groups, the user	s in a particular role or territory, or the users
a role or territory p	lus all of the users below that ro	le or territory in the hierarchy.	
View: All 💌 🖻	dit Create New View		
	A B C D E F	GHIJKLMNOP	Q R S T U V W X Y Z Other All
	A B C D E F	G H I J K L M N O P	Q R S T U V W X Y Z Other Al
Label †	A B C D E F		Q R S T U V W X Y Z Other All

Figure 9-21. Setting up public groups

- 3. Fill in the following details, as shown in Figure 9-22.
 - Enter the name of the public group in Label.
 - Enter the unique API name in Group Name.
 - To add members to a public group, move them from Available Members to Selected Members.

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Group Informat	on Save Cancel	
New Public Grou	p	1
Group Na Grant Access Us Hierarch	ng Vi es	
Search: Public Gi Available Membe		
-None- 📥	-None-	

Figure 9-22. Adding members to a public group

4. Click Save. Now you have a new public group with members.

Manual Sharing

Manual sharing can be used to provide individual access to records through a sharing button.

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There are four prerequisites needed to give access to another record. These prerequisites require the following:

- You are the record owner.
- You are in a role higher than the record owner.
- You have "full access" permission to the record.
- You are a system administrator.

Summary

In this chapter, you learned how Salesforce approaches security in a multitiered architecture, which supports greater flexibility and protection. Be sure to visit http://trust.salesforce.com for transparent access to security threats and advisories.

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