



P r o f e s s i o n a l E x p e r t i s e D i s t i l l e d

Salesforce.com Customization Handbook

Customize Salesforce to automate your business requirements

Rakesh Gupta

Sagar Pareek

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Sagar Pareek



BIRMINGHAM - MUMBAI

Salesforce.com Customization Handbook

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Credits

Authors

Rakesh Gupta
Sagar Pareek

Reviewers

Steven Jeffes
Praveen Makam
Francisco Esteban Fálder Rodríguez
Sakthivel Thandavarayan
Jitendra Zaa

Acquisition Editor

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Graphics

Valentina D'silva
Disha Haria
Abhinash Sahu

Production Coordinator

Shantanu Zagade

Cover Work

Shantanu Zagade

About the Authors

Rakesh Gupta is a Salesforce MVP, evangelist, trainer, blogger, and an independent Salesforce consultant. He is from Katihar, Bihar, and lives in Mumbai. He has been working on the Force.com platform since 2011. Currently, he is working as a Salesforce consultant and is a regular contributor to the Salesforce Success Community. He is the co-author of *Developing Applications with Salesforce Chatter*, Packt Publishing, and he is also a technical reviewer of *Learning Force.com Application Development*, Packt Publishing. He is very passionate about Force.com and shares information through various channels, including his blog at <http://rakeshistom.wordpress.com>.

He has trained almost 150 professionals around the globe and handled corporate trainings. He has 5x certifications in Salesforce. He works on all the aspects of Salesforce and is an expert in data migration, integration, configuration, and customization. He is the leader of the Navi Mumbai and Nashik developer user groups in India. He is also the initiator of the Mumbai Salesforce user group. He organizes Meetups at regular intervals for the groups he is part of.

He can be reached at rakeshistom@gmail.com, or you can follow him on Twitter [@rakeshistom](https://twitter.com/rakeshistom).

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Sagar Pareek is a Salesforce enthusiast, blogger, author, and Salesforce certified Force.com developer. He is from Bikaner, Rajasthan, and currently lives in Noida. He has been working on the Force.com platform since 2012, from his college days. Since 2013, he is working for Astrea IT Services Pvt. Ltd., Noida as a Salesforce developer. Prior to that, he worked as a PHP and Java intern at Acme Embedded Technologies Pvt. Ltd., Bikaner. He was featured by Salesforce in a webinar (*Boost Your Career: Get Cloud-Trained and Certified*). He won a prize in the Salesforce New Year Resolution 2013 challenge. He actively participates in the Salesforce discussion platforms such as user groups and organizing workshops. He leads the India Salesforce student developer user group and is the co-leader of the Navi Mumbai Salesforce developer user group. You can follow him on his blog at <http://forceexperiment.wordpress.com>. He holds a Bachelor of Technology degree in Computer Science and Engineering from Rajasthan Technical University and is an alumnus of Manda Institute of Technology, Bikaner. He spends his spare time with his family and friends and exploring Force.com. He is the co-author of *Developing Applications with Salesforce Chatter*, Packt Publishing.

You can connect with him on Twitter @Sagarjaipareek.

I would like to thank my parents Sushil Pareek and Chanchal Pareek, my siblings Nikita Pareek and Dr. Sugita Pareek, my gurus Manish Shandilya and Pankaj Kumar Pandey, my mentors Kavindra Patel, Director, Developer Programs and Events at Salesforce.com, and Paresh Gupta, co-founder, Sharp Edge Learning. Special thanks to all the reviewers who spent their precious time reviewing our content. Thanks to the cartoonist Anil Bhargava for his excellent work on the images used in this book.

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About the Reviewers

Steven Jeffes has had a successful career generating over \$450MM in sales and orchestrating the turnaround (\$100MM+) of several Fortune 200 companies. He has nearly 100 career awards and accolades and is an architect of one of the most successful innovation programs in US history at GE. He is considered a thought leader/expert in an array of corporate disciplines such as Customer Relationship Management (CRM) and Customer Service Strategy; social media and Social Relationship Management (SRM); marketing and sales and world-class process design; brand and product management, public relations, and communications; engineering, IT, technology development and deployment, and innovation programs; and organizational design/optimization and change management.

Steven has worked for world's leading companies such as Accenture, IBM Global Services, General Electric, and Lockheed-Martin and has provided CXO-level advisory consulting services to companies such as Macy's, American Express, Intuit, Verizon, Vanguard, Pfizer, Johnson & Johnson, Citibank, JC Penney, Dell, Sony, and many others. His entire bio can be found at <http://www.stevenjeffes.com/>.

Steven is the author of the bestselling book *Appearance Is Everything*, SterlingHouse Publisher, which can be found on Amazon (<http://www.amazon.com/Steve-Jeffes/e/B001K8FMLS>). He is also the author of the syndicated blog on CRM, marketing, innovation, social media, and change management followed by 168,000 people worldwide (<http://stevenjeffes.wordpress.com/>). Steven can be reached on e-mail at StevenJeffes@yahoo.com.

Praveen Makam is based out of Bangalore, India, and has been working in the Salesforce CRM domain since 2011. He is currently working with CSC Consulting India and was working with Accenture Consulting until 2013. He can be reached on Twitter @praveenmakam.

Francisco Esteban Fálder Rodríguez is currently working as a technical account manager for the biggest partner of Salesforce.com in Europe. His background as a Telecommunication Engineer makes him a versatile asset to get involved in any kind of Salesforce project. He previously worked in Salesforce.com technical support.

I would like to thank Gonzalo Pérez Díaz for providing me with the opportunity to get involved in this project.

Sakthivel Thandavarayan is based in Tamil Nadu, India. He has more than 4 years of IT experience and has been building solutions with Salesforce CRM since 2009 for companies of all sizes and across a variety of industries. He is very passionate about the Salesforce.com platform and currently works as senior Salesforce consultant for a reputed US-based company.

He is a Salesforce.com Certified Administrator (ADM 201) along with his regular contribution to the Salesforce customer community/developer forum. He moderates the Salesforce Google+ community at <https://plus.google.com/communities/112913878984525867679>.

Before contributing to this book as a reviewer, he worked as a technical reviewer for the book *Salesforce CRM: The Definitive Admin Handbook Second Edition*, Packt Publishing. You can mail him at sakthi.tsl@gmail.com.

I would like to thank the authors, project coordinators, and Packt Publishing for giving me this fantastic opportunity. Special thanks to my beautiful wife and gorgeous daughter, who motivate me to achieve great things and help, support, and guide me through each and every step.

Jitendra Zaa is a Force.com developer and owner of the well-known Salesforce.com blog <http://blog.shivasoft.in/>. He has extensively worked on many areas of Force.com, such as integration, data loading, AppExchange, and application development. He is a Java and Salesforce.com certified advanced developer, administrator, and consultant.

Jitendra has more than 7 years of experience in software development using Salesforce, Java, Node.js, AngularJS, PHP, ORMB, J2ME, and ASP.NET technologies. He graduated from RTM Nagpur University and is currently working with Cognizant Technology Solutions in the USA.

Apart from this book, Jitendra was also the reviewer on *Visualforce Development Cookbook*, and wrote a blog on *Developing Applications with Salesforce Chatter*, both by Packt Publishing. His Twitter handle is @ilovenagpur.

I wish to thank my parents, family, friends, and especially my wife for helping me maintain time for writing blogs and encouraging me. Also, I would like to thank the Packt Publishing team and the author of this book for giving me this unique opportunity.

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Preface

This book is for Salesforce developers, administrators, customers, and partners to get started with the Salesforce platform configuration. It will act as both a reference for an administrators and a configuration guide for newbie customers who want to configure Salesforce for their organization.

This book covers all the possible configurations of Salesforce for enterprises, such as workflow, approval process, Chatter, data management, and AppExchange overview. We have taken a hands-on approach with real-time scenarios so that readers can get a complete overview on the topics.

Salesforce CRM is a service by Salesforce.com, which is commercial, but all the material in this book is developed using the Developer Edition.

What this book covers

Chapter 1, Getting Started with Salesforce, provides basic knowledge of CRM, proceeds towards Salesforce using examples, and then states the benefits of implementing Salesforce for your organization. It also covers the basic architecture of Salesforce.

Chapter 2, User Management and Organization Administration, starts with various ways to set up a user in Salesforce and then explains the organization administration.

Chapter 3, Making Your Salesforce Data Secure – Security Settings in Salesforce, covers the basics of Salesforce platform security and then goes through various security aspects of Salesforce.

Chapter 4, Domain Management, E-mail Administration, and Google Apps Settings, provides a clear-cut knowledge of domain management, e-mail management, and Google Apps setup.

Chapter 5, CRM Functions and Streamlining Business Requirements, gives the reader an overview on Sales Cloud and Service Cloud.

Chapter 6, Automating a Business Process, serves as a highlight of the book in which the reader will gain knowledge on how to automate a business process in Salesforce.

Chapter 7, Concepts of Data Management, describes various ways to manage data in Salesforce.

Chapter 8, Reports and Dashboards in Salesforce, explains the concept of reports and dashboards in Salesforce. Salesforce reports and dashboards help to analyze information captured in CRM, further assisting to make informed business decisions.

Chapter 9, Chatter Configuration, explains how to configure Chatter for your organization and introduces you to some of the basic settings of Salesforce Chatter.

Chapter 10, Mobile Administration, explains how to perform mobile administration. This chapter also discusses SalesforceA installation and its uses.

Chapter 11, Setting Up Deployment Processes, covers various ways to deploy changes in a live system.

Chapter 12, AppExchange – Extending Salesforce Functionality, teaches you how to extend a Salesforce.com functionality using third-party applications.

What you need for this book

To understand all the projects covered in this book, you will need the following:

- A Salesforce developer account
- A browser
- An Internet connection

Who this book is for



The book is written for anyone, from a newbie to an experienced professional in the Salesforce arena, who wants to learn or explore various aspects of Salesforce customization. After reading this book, you will be able to set up the entire configuration on your own.



Conventions

In this book, you will find a number of styles of text that distinguish between different kinds of information. Here are some examples of these styles, and an explanation of their meaning.

Code words in text, database table names, folder names, filenames, file extensions, pathnames, dummy URLs, user input, and Twitter handles are shown as follows: "In the search bar at the top, enter the keyword `vcard`."

New terms and **important words** are shown in bold. Words that you see on the screen, in menus or dialog boxes for example, appear in the text like this: "When you click on **AppExchange**, a new window will open in the browser."

 Warnings or important notes appear in a box like this. 

 Tips and tricks appear like this. 

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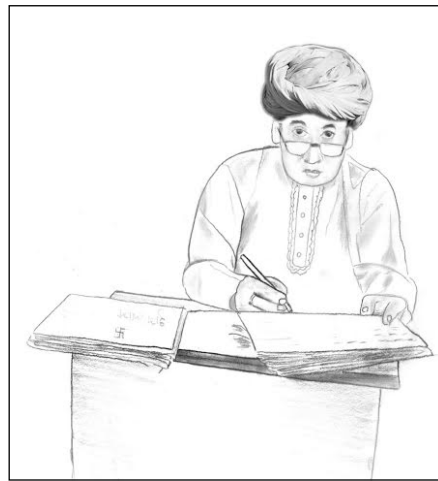
Getting Started with Salesforce

The chapter starts with an overview of the Salesforce CRM and its architecture and takes the discussion forward to the various products of Salesforce.com. We will discuss ways to streamline sales processes and improve collaboration in an organization. By the end of this chapter, you will have learned how to create a Salesforce developer account. The following topics will be covered in this chapter:

- Overview of the Salesforce CRM
- Architecture of Salesforce
- Various products of Salesforce
- Streamlining the sales process
- Improving collaboration in your organization
- What makes Salesforce the most innovative company
- Creating a Salesforce developer account

Overview of the Salesforce CRM

In ancient ages, people used papyrus and wood to maintain their customer information, and eventually, this changed to slate. In the seventeenth and eighteenth centuries, kings used to take help from clerks (also known as Munim); these clerks were responsible for maintaining all the customer information on behalf of the king. From time to time, the clerks used to show this account information to the king. The problem with this system was that it was not secured; the clerk could easily manipulate the data for his benefit, and this may have caused losses to the king's business.

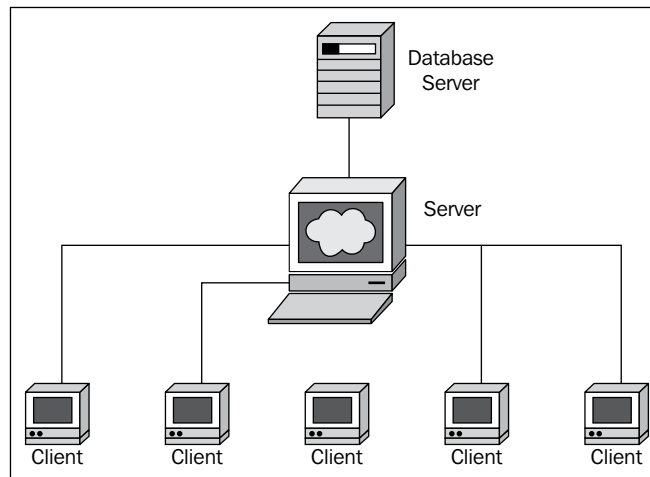


"Necessity is the mother of invention" - Plato

As the time passed, computers were invented, so people used them to save the customer information. In the late nineteenth century, the client-server model came into the picture, which introduced a centralized way of keeping record of the customer information.

Client-server architecture

In a client-server architecture, the end user acts as a client to the service provider; the service provider has its own centralized system known as the server. Once the user connects to the server, they get full rights to access their data. A few examples of CRM software based on the client-server model are Siebel, Oracle RightNow, and SugarCRM. The following is a client-server architecture diagram that describes this concept:



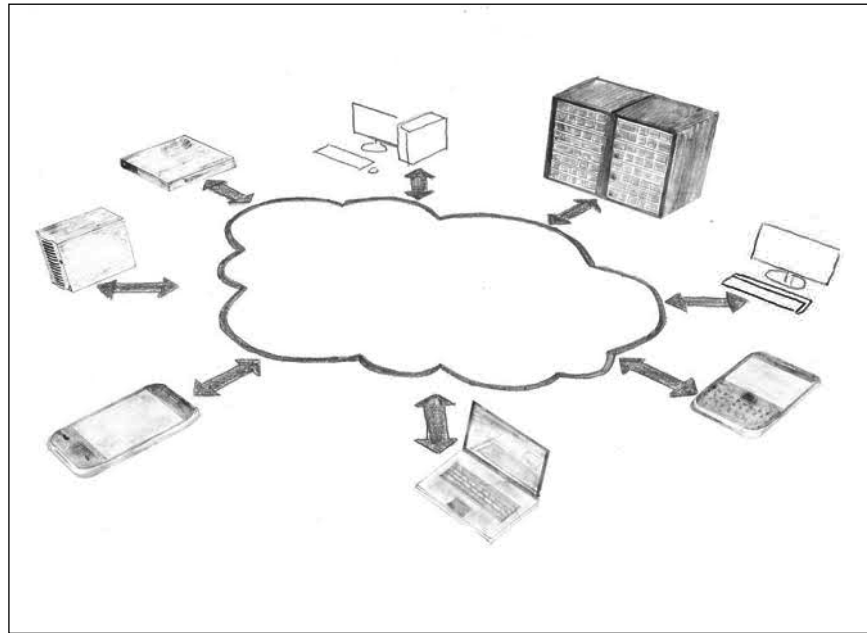
Pros and cons of the client-server architecture

The following table describes the pros and cons of the client-server architecture:

Pros	Cons
The data is centralized once the user connects to the server, which means that he or she gets access to the relative data.	The user does not have access to the data on their system when he or she is not connected to the server.
Any number of users can connect to the server.	Due to the high volume of requests, the server may stop responding or can go down.
Data is stored in company premises or company data center.	If a technical fault occurs at the data center, then the customers will not be able to access the system.
	This architecture needs technical staff to maintain and upgrade the server.
	This architecture requires a dedicated high-speed server and a client's system with high-end graphics and the required software.

There were certain problems with the maintenance and upgrading of the client-server model. So, in the twenty-first century, cloud computing came into the picture.

Cloud computing is the new concept in the computing era, in which customers don't have to worry about server maintenance, upgradation, and scalability. We can say that this is a subscription-based model where we can buy the number of licenses as required and start using the application. A few big names in cloud computing are Amazon, Google, IBM, Microsoft, and Salesforce.com.



As per the preceding diagram, we see that we can connect with a large number of devices (mobiles, tablets, and workstations) via the same server. Customers only need a browser and an Internet connection to use their applications.

Advantages of cloud computing

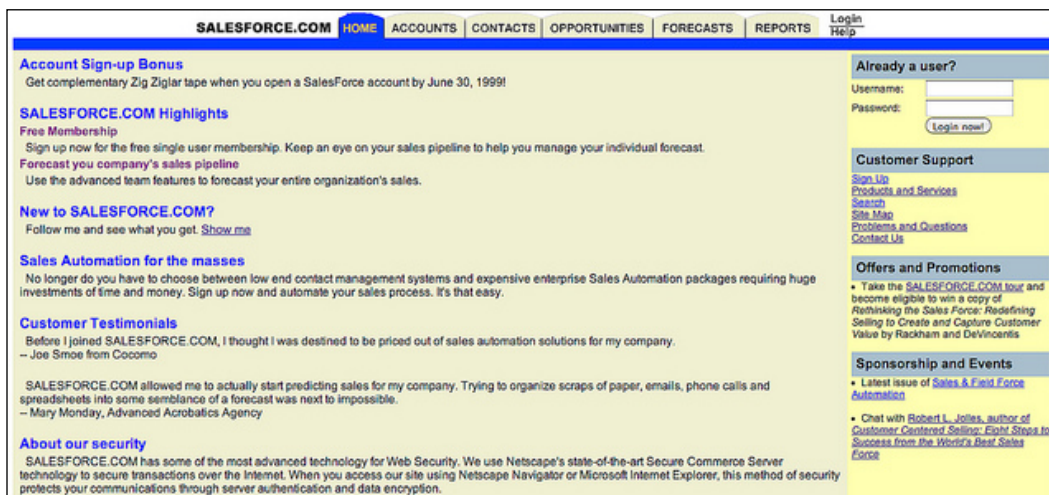
The following are the advantages of cloud computing:

- No large startup fee
- It's a subscription-based model
- No buying, maintaining, and configuring hardware and software
- We can scale up with the growth of our business
- It's more secure and reliable than the client-server model
- We can access it from anywhere, anytime, and via any device; we just need an Internet connection

Introducing Salesforce CRM

Salesforce.com was initially founded as a CRM company in the dot com era in 1999 by former Oracle executives, Marc Benioff, Parker Harris, Dave Moellenhoff, and Frank Dominguez, as a company specializing in **Software as a Service (SaaS)**. In June 2004, the company went public on the New York Stock Exchange under the stock symbol CRM. Salesforce.com is the leader in the SaaS-based on-demand cloud computing model. Salesforce.com's journey started in 2002 when they launched their first SaaS-based product.

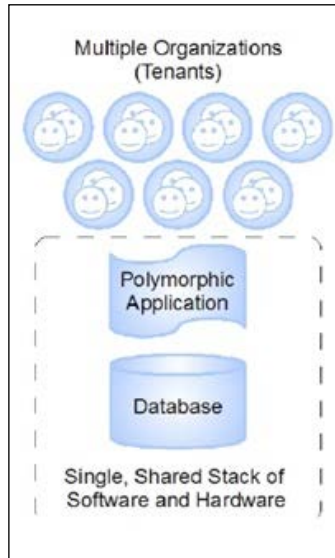
The following screenshot shows the home page of their first product:



The architecture of Salesforce.com

The architecture of Salesforce.com is multitenant. In a multitenant architecture, a single system serves to the whole consumer base of the provider. This means that the system resources are shared among all the users. Salesforce.com provides a single copy of an app to all the organizations, which runs on Salesforce servers; the organizations are permitted to customize the app according to their business requirements. The resources are similar for all the Salesforce customers. Multiple organizations encounter the same interface to interact with the Salesforce cloud.

Salesforce also applies some limits to the usage termed as governor limits to make sure that a user/organization does not hit the threshold that might affect the system performance, thus making the system work slow or go down for other users or organizations. The clients of Salesforce.com are termed as an organization. Multiple organizations are called tenants, and these tenants further have multiple users based upon the organization's user base or employees.



Various products of Salesforce

Salesforce has various products available and they are as follows:

- Sales Cloud
- Service Cloud
- Salesforce Chatter
- Data.com
- Work.com
- Desk.com
- ExactTarget Marketing Cloud
- Salesforce1

Sales Cloud

Sales Cloud is a product designed to automate your sales process. By implementing this, an organization can boost their sales process. It includes campaign, lead, account, contact, opportunity (deal), product, quotes, report, dashboard, and many other features as well, which we will discuss in next chapter. Salesforce offers various Sales Cloud editions, and as per the business needs, an organization can buy any of these different editions:

			Most popular	
CONTACT MANAGER	GROUP	PROFESSIONAL	ENTERPRISE	PERFORMANCE
Contact management for up to 5 users	Basic sales & marketing for up to 5 users	Complete CRM for any size team	Customize CRM for your entire business	Extend CRM to accelerate performance
US\$5	US\$25	US\$65	US\$125	US\$300
/user/month* (billed annually)	/user/month* (billed annually)	/user/month* (billed annually)	/user/month* (billed annually)	/user/month* (billed annually)
Try for FREE >	Try for FREE >	Try for FREE >	Try for FREE >	Try for FREE >
Includes the following features: Accounts & contacts Task & event tracking Outlook, Gmail email integration Mobile access Content library Customizable reports Chatter—company social network	Includes all Contact Manager features, plus: Opportunity tracking Lead scoring, routing & assignment Email templates & tracking	Includes all Group Edition features, plus: Mass email Campaigns Customizable dashboards	Includes all Professional Edition features, plus: Workflow & approval automation Integration via web service API Profiles and page layouts Custom app development Salesforce Identity	Includes all Enterprise Edition features, plus: Service Cloud Knowledge Live Agent web chat Console for Sales Cloud Work.com perform Multiple sandboxes Unlimited custom app development Premier+ success plan



The price may change over time; whenever your organization is planning to implement Salesforce Sales Cloud, ask your account executive to contact Salesforce.com or visit <http://www.salesforce.com/in/sales-cloud/overview/> for the updated price.

Various editions of Sales Cloud

The following are the various editions of Sales Cloud:

- **Contact Manager Edition:** This edition is for small businesses. It primarily provides the contact management features. By implementing this edition, an organization can track accounts, contacts, activities, calendars, notes and attachments, and reports. Mobile access is also available for users. Users can also access Chatter. For each Contact Manager Edition license, organizations have to pay 5 USD per month.
- **Group Edition:** This edition is for small workgroups or businesses with a limited number of users only. Currently, Group Edition can have a maximum of 10 users per organization. Group Edition contains all the features of Contact Manager Edition, plus some extra features. By implementing Group Edition, organizations can manage their sales life cycle, starting from expression of interest (lead management) to closing the deal and providing customer service. Group Edition offers accounts, contacts, opportunities, leads, and reports. For each Group Edition license, organizations have to pay 25 USD per month.
- **Professional Edition:** This edition is for **small and medium enterprise (SME)**. It is designed for business needs where a fully featured CRM functionality is required. It provides the CRM functionality of marketing, sales, and service automation. Professional Edition is a perfect fit for small- to mid-sized businesses. It includes all the features of Group Edition, plus the organization can manage campaigns, mass e-mail, and a customizable dashboard. For each Professional Edition license, organizations have to pay 65 USD per month.



In any of the preceding three editions, the API is not enabled. The API is required to use external applications such as dataloader. To enable profiles, workflow, and the approval process, the organization has to pay an extra amount.

- **Enterprise Edition:** This edition is for businesses with large and complex business requirements. It includes all the features available in Professional Edition, plus it provides advanced customization capabilities to automate business processes and web service API access for integration with other systems. Enterprise Edition also includes workflow, the approval process, profile, page layout, and custom app development. In addition, organizations also get the Salesforce Identity feature with this edition. For each Enterprise Edition license, organizations have to pay 125 USD per month.
- **Performance Edition:** This edition includes all the Salesforce.com features for an entire enterprise. It provides a new level of platform flexibility to manage and share all of their information on demand. The key features of Salesforce.com Unlimited Edition (in addition to Enterprise Edition features) are premier support, full mobile access, and increased storage limits. It also includes Work.com, Service Cloud, knowledge base, live agent chat, multiple Sandboxes, and unlimited custom app development.



When purchasing Salesforce.com licenses, organizations have to negotiate with Salesforce to get the maximum number of Sandboxes. If your organization wants to have more space, then the organization will have to pay an extra amount. To know more about these license types, visit www2.sfdcstatic.com/in/assets/pdf/datasheets/DS_SalesCloud_EdCompare.pdf.

Service Cloud

Service Cloud helps your organization to streamline its customer service process. Users can access it anytime, anywhere, and from any device. It helps your organization to close the deal faster. Service agents can connect with customers through the agent console, which means that the agents can interact with customers through multiple channels. Service Cloud includes case management, **Computer Telephony Integration (CTI)**, Service Cloud Console, knowledge base, Salesforce Communities, Salesforce Private AppExchange, Premier+ success plan, reports, and dashboards with many other analytical features. We will discuss more about Service Cloud in *Chapter 5, CRM Functions and Streamlining Business Requirements*.

			Most popular	
<p>CONTACT MANAGER</p> <p>Contact management for up to 5 users</p> <p>US\$5</p> <p>/user/month* (billed annually)</p> <p>Try for FREE ></p> <p>Includes the following features:</p> <ul style="list-style-type: none"> Accounts & contacts Task & event tracking Outlook, Gmail email integration Mobile access Content library Customizable reports Chatter—company social network 	<p>GROUP</p> <p>Basic sales & marketing for up to 5 users</p> <p>US\$25</p> <p>/user/month* (billed annually)</p> <p>Try for FREE ></p> <p>Includes all Contact Manager features, plus:</p> <ul style="list-style-type: none"> Opportunity tracking Lead scoring, routing & assignment Email templates & tracking 	<p>PROFESSIONAL</p> <p>Complete CRM for any size team</p> <p>US\$65</p> <p>/user/month* (billed annually)</p> <p>Try for FREE ></p> <p>Includes all Group Edition features, plus:</p> <ul style="list-style-type: none"> Mass email Campaigns Customizable dashboards 	<p>ENTERPRISE</p> <p>Customize CRM for your entire business</p> <p>US\$125</p> <p>/user/month* (billed annually)</p> <p>Try for FREE ></p> <p>Includes all Professional Edition features, plus:</p> <ul style="list-style-type: none"> Workflow & approval automation Integration via web service API Profiles and page layouts Custom app development Salesforce Identity 	<p>PERFORMANCE</p> <p>Extend CRM to accelerate performance</p> <p>US\$300</p> <p>/user/month* (billed annually)</p> <p>Try for FREE ></p> <p>Includes all Enterprise Edition features, plus:</p> <ul style="list-style-type: none"> Service Cloud Knowledge Live Agent web chat Console for Sales Cloud Work.com perform Multiple sandboxes Unlimited custom app development Premier+ success plan



The price might change over time. Whenever your organization is planning to implement Salesforce Service Cloud, ask your account executive to contact [Salesforce.com](http://www.salesforce.com/in/service-cloud/overview/) or visit <http://www.salesforce.com/in/service-cloud/overview/> for the updated price.

Various editions of Service Cloud

The following are the various editions of Service Cloud:

- **Professional Edition:** This edition is for small and medium enterprises. It provides CRM functionality for customer support via various channels. It is a perfect fit for small- to mid-sized businesses. It includes features such as case management, CTI integration, mobile access, solution management, content library, reports, and analytics with sales features such as opportunity management and forecasting. For each Professional Edition license, organizations have to pay 65 USD per month.



In any of the three editions, API is not enabled. To enable profiles, workflow, and the approval process, the organization has to pay an extra amount.

- **Enterprise Edition:** This edition is for businesses that have large and complex business requirements. It includes all the features available in Professional Edition, plus it provides advance customization capabilities to automate business processes and web service API access for integration with other systems. It also includes the service console, service contract and entitlement management as well as the workflow and approval process, web chat, offline access, and knowledge base. Organizations get the Salesforce Identity feature with this edition. For each Enterprise Edition license, organizations have to pay 125 USD per month.



For the web chat, knowledge base, and Salesforce communities as services, organizations have to pay an extra amount.

- **Performance Edition:** This edition includes all the Salesforce.com features for an entire enterprise. It provides all the features of Enterprise Edition and a new level of platform flexibility to manage and share all of their information on demand. The key features of Salesforce.com's Performance Edition (in addition to the Enterprise Edition features) are premier support, full mobile access, unlimited custom apps, and increased storage limits. It also includes Work.com, Service Cloud, knowledge base, live agent chat, multiple Sandboxes, and unlimited custom app development.



When purchasing a license organization, you have to negotiate with Salesforce to get the maximum number of Sandboxes. If you want to more space, then the organization will have to pay extra. To know more about these license types, visit the Salesforce website http://www2.sfdcstatic.com/in/assets/pdf/datasheets/DS_ServiceCloud_EdCompare.pdf.

Salesforce Chatter

Chatter is a social platform that integrates with Salesforce's infrastructure to improve the collaboration in the organization. In other words, Chatter is a way to collaborate with team members at the workplace or with customers. It is basically a combination of Twitter and Facebook. It helps organizations to implement transparency in communication and improve customer satisfaction. It gives users access to real-time information about what is going on in the company. It is necessary to empower the entire organization with tools to communicate quickly and effectively with the right information at the right time and this is what Chatter does. By implementing Chatter, organizations can boost their **Return of Investment (ROI)**. We will discuss more about Salesforce Chatter in *Chapter 9, Chatter Configuration*.

	Most popular	
<p>PROFESSIONAL</p> <p>Basic service and support for any size team</p> <p>US\$ 65</p> <p>/user/month* (billed annually)</p> <p>Try for FREE ></p> <p>Includes the following features:</p> <ul style="list-style-type: none"> Case management Computer Telephony Integration (CTI) Web and email capture Mobile access Reports & analytics Auto-suggested solutions Case auto-assignment & escalation Customizable dashboards Content library Email integration Sales features such as opportunities & customizable forecasting 	<p>ENTERPRISE</p> <p>Service for the enterprise</p> <p>US\$ 135</p> <p>/user/month* (billed annually)</p> <p>Try for FREE ></p> <p>Includes All Professional features, plus:</p> <ul style="list-style-type: none"> Service Cloud Console Service contracts and entitlements Knowledge base ** Web chat ** Salesforce Communities for Service ** Social customer service *** Workflow & approvals Visual workflow Call scripting Case team collaboration Integration via Web Services API Developer sandbox Offline access Enterprise analytics Salesforce Identity 	<p>PERFORMANCE</p> <p>Extend CRM to accelerate performance</p> <p>US\$ 300</p> <p>/user/month* (billed annually)</p> <p>Try for FREE ></p> <p>Includes All Enterprise features, plus:</p> <ul style="list-style-type: none"> Work.com perform Multiple sandboxes Full mobile Unlimited customizations Unlimited custom apps Multiple sandboxes Assigned Success Resource† 24x7 toll-free support Unlimited access to 100+ administration services Unlimited access to Premier online training catalog Mobile customization & administration Increased storage limits ‡



The price might change over time, so whenever your organization is planning to implement Salesforce Chatter, ask your account executive to contact [Salesforce.com](https://www.salesforce.com/in/chatter/overview/Various%20editions%20of%20Salesforce%20Chatter) or visit <https://www.salesforce.com/in/chatter/overview/Various editions of Salesforce Chatter> for the updated price.

The following are the various editions of Chatter:

- **Chatter:** This is a free license for organizations to improve collaboration. It includes basic collaboration features such as Chatter Messenger, status update, activity feeds, group, file sharing Chatter desktop, and mobile applications.
- **Chatter Plus:** For this license, the organization has to pay 15 USD per user per month. Users with this license type can access account (read only), contact (read only), 10 custom objects, one custom app, solutions and ideas, tasks and activities, advanced sharing, Salesforce Private AppExchange, Salesforce identity, and many other features.



For Professional Edition customers, new Chatter users will not have access to accounts, contacts, and custom objects unless they have the profiles and page layouts add-on product previously enabled. To know more about this license type, visit the Salesforce website https://secure2.sfdcstatic.com/in/assets/pdf/datasheets/DS_Chatter.pdf.

Data.com

Data.com is an online business directory of companies and business professionals. It is maintained and accessed by a worldwide community of over a million subscribers along with Salesforce.com. It allows subscribers to exchange and share their business information. Data.com helps organizations to clean their data, or in other words, it provides you with the correct data whenever you need it. Organizations can perform a real-time cleanup of their accounts, contacts, and leads. Data.com helps you to find the right leads for your organization. Data.com allows you to access a business directory where you can find contacts and company-related information. Data.com is one of the largest business directories that contain business contact information and company information of private as well as public-listed companies. No other business directory provides contacts with both phone and e-mail information. You can find leads or customers for your organization by using Data.com. Two important facts about Data.com are as follows:

- 4+ million in-depth company profiles from D&B
- 30+ million highly accurate leads from Jigsaw

Various editions of Data.com

The following are the various editions of Data.com:

- **Data.com Clean:** This is an essential part of the Salesforce's Data.com package. It offers a number of ways to update your Salesforce account, contact, and lead records with Data.com. It compares them with the records from Data.com and links these records that match the criteria, thus providing clean status information on the Salesforce record. For each Data.com Clean license, organizations have to pay 25 USD per month. For each Data.com premium clean license, organizations have to pay 35 USD per month, as shown in the following screenshot:

The screenshot displays three pricing cards for Data.com editions. The 'Most Popular' badge is positioned above the 'Data.com Prospector' card.

Edition	Price per user/month*	Key Features
Data.com Clean	\$25	Get org-wide cleansing of leads, contacts, and accounts right in Salesforce. Includes: Improve productivity, Increase CRM adoption, Clean data automatically, Prevent account duplication, Fill in missing information.
Data.com Prospector	\$125	Access millions of leading contact and account data right in Salesforce. Includes: Find decision makers faster, Target new accounts with global D&B data, Real time updates of data, Search by industry, geo, or revenue, Export or import directly to Salesforce, Import 300 records per month, Additional contacts are \$.50 each.
Data.com Premium	\$35 (Clean) / \$165 (Prospector)	Upgrade to Premium D&B account data in Salesforce. Gain 83 total fields of data for Data.com Clean and Prospector including: Master account object, Corporate family linkages, Up to 6 SIC/NAICS codes (Industry classification), Delinquency risk, Improved territory planning, whitespace analysis & targeting.

*All per user products billed annually.



The price may change over time. Whenever your organization is planning to implement Data.com, ask your account executive to contact Data.com support or visit <http://www.data.com/editions-pricing/index.jsp> for the updated price.

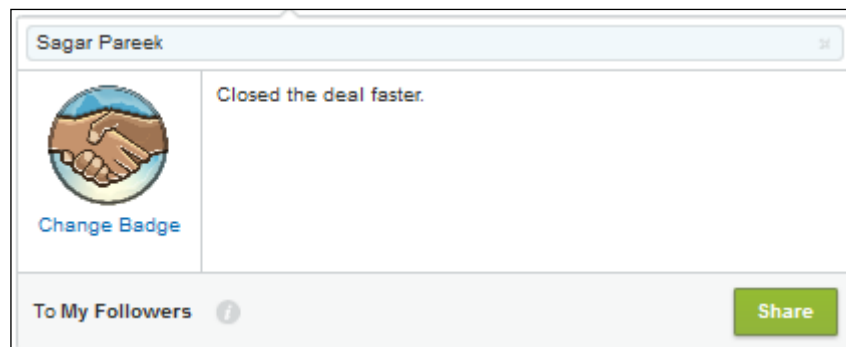
- **Data.com Prospector:** To make use of most of the features of Data.com, your organization needs to have a Data.com Prospector license. Data.com offers two versions of Data.com Prospector. It will help organizations add data from Data.com: Data.com Corporate Prospector and Data.com Premium Prospector. For each Data.com Corporate Prospector license, organizations have to pay 125 USD per month. For each Data.com Premium Prospector license, organizations have to pay 165 USD per month.

Work.com

Work.com is a Salesforce product that aligns sales and marketing people, motivates your team, and provides performance-driven real-time coaching. Here, you can do few things, such as:

- Alignment between different teams
- Set personal goals with business goals
- Recognize sales and marketing people publically so that they will get motivated


The following screenshot is an example of a use of Work.com. Here, Rakesh is complementing Sagar as he has closed the deal faster than expected:



Various editions of Work.com

The following screenshot shows us the features and pricing of Work.com:

	Motivate \$10 /user/month	Align \$15 /user/month	Perform \$20 /user/month
Motivate			
Real-time recognition & rewards	✓	✓	✓
Chatter—company social network	✓	✓	✓
Rich social collaboration	✓	✓	✓
Customizable recognition badges	✓	✓	✓
API access to all Work.com data	✓	✓	✓
Single Sign on with salesforce.com	✓	✓	✓
Customizable reports & dashboards	✓	✓	✓
Mobile access	✓	✓	✓
Align			
Align Company, Team, & Personal Goals		✓	✓
Coaching integrated to sales process		✓	✓
Compatible with OKR, SMART, etc		✓	✓
Goals linked to salesforce.com data		✓	✓
1:1 coaching, feedback, & mentoring		✓	✓
Perform			
Easy Performance Summaries			✓
HR Compliant Performance Summaries			✓
Performance Calibration			✓

 The price may change over time. Whenever your organization is planning to implement Work.com, ask your account executive to contact Work.com or visit <http://work.com/pricing> for the updated price.

The following are the various editions of Work.com:

- **Motivate:** This license of Work.com lets you recognize and reward your employees and team members in real time. Here, you can offer rewards such as Amazon.com gift cards. You can use gamification and boost your business outcomes. Each Motivate license costs 10 USD per month per user.
- **Align:** This license lets you use all the features of Motivate license plus have privileges to align your team member's goals with the organization's goals as well as for coaching and monitoring purposes. Each Align license costs 15 USD per month per user.

- **Perform:** This license lets you use both of the preceding licenses plus has the advantage of using the performance analysis features of Work.com. For this license, organizations have to pay 20 USD per month per user.

Desk.com

Organizations can use Desk.com to simplify and make life easier for customer support agents. Data.com is a Salesforce product where you get support from all the social channels on a single platform. Service agents can access Desk.com from their desktop and mobile. The following screenshot shows Desk.com's features and pricing:

The screenshot displays two pricing plans for Desk.com, each presented as a shield-shaped card. The Starter Plan is priced at \$3 per month per agent, billed annually, and includes features such as 3 agents, limited case management, and 30 days of reporting. The Plus Plan is priced at \$29 per month per agent, billed annually, and includes features such as unlimited agents, unlimited case management, and unlimited reporting. Both plans offer a free trial and include features like knowledge base access, customer support center, and Salesforce integration.

Starter Plan	Plus Plan
Hero-in-a-box solution to jump-start your customer service program.	Hero-in-a-box solution for delivering epic customer service
START YOUR FREE TRIAL	START YOUR FREE TRIAL
3 Agents	No Limit to Number of Agents
1 Multi-channel Support	Unlimited Multi-channel Support
Limited Case Management	Unlimited Case Management
Last 30 days Reporting	Unlimited Reporting
Knowledge Base Access	Knowledge Base Access
Customer Support Center	Customer Support Center
English Supported	45+ Languages Supported
Salesforce Integration	Salesforce Integration
3rd Party Application Integration	3rd Party Application Integration
Desk.com API Access	Desk.com API Access
Community Support	Community Support
	Email Support
	Phone Support
	Full Customization
	Email Widgets
	Branded Domain SSL Hosting



The price may change over time. Whenever your organization is planning to implement Desk.com, ask your account executive to contact Desk.com support or visit <http://www.desk.com/pricing> for the updated price.

Various editions of Desk.com

The following are the various editions of Desk.com:

- **Starter Plan:** In this plan, you will get three support agents' access, including this application, one multichannel support, last 30 days reporting, and a knowledge base access. It also includes Salesforce integration and community support. Organizations have to pay 36 USD per year.
- **Plus Plan:** In this plan, you get all unlimited features of Desk.com, plus e-mail and phone support with full customization and branded Domain SSL hosting. For this, organizations have to pay 29 USD per agent per month but it will be charged annually.

ExactTarget Marketing Cloud


Salesforce renamed its marketing cloud product to ExactTarget Marketing Cloud after the acquisition of Exact Target in 2013 for 2.5 billion USD. This product is used for marketing purposes; it is a marketing automation tool. Using this product, you can create a campaign with a combination of e-mail, mobile, social media, and the Web. Here, you can listen to your customers with Radian6, publish with Buddy media, and advertise with Social.com.

Various editions of ExactTarget Marketing Cloud

The following screenshot gives us information about ExactTarget Marketing Cloud features and pricing:

The screenshot displays four pricing tiers for ExactTarget Marketing Cloud, arranged from left to right: BASIC, PROFESSIONAL, CORPORATE, and ENTERPRISE. The CORPORATE tier is highlighted as 'Most popular'. Each tier includes a 'Get started >' button and a list of features. The CORPORATE tier also includes a plus sign indicating it includes all features from the previous tiers.

Edition	Description	Key Features
BASIC	Enhance your social marketing	Up to 5 social presences Social listening – up to 20K mentions Insights partners – 1K credits Training and best practices
PROFESSIONAL	Scale social across your business	Up to 10 social presences Social listening – up to 250K mentions Insights partners – 50K credits Full reporting and dashboards
CORPORATE (Most popular)	Implement social at your business core	Up to 20 social presences Social listening – up to 1.5M mentions Insights partners – 200K credits Complete workflow and automation
ENTERPRISE	Power your socially connected enterprise	Up to 50 social presences Social listening – up to 7.5M mentions Insights partners – 500K credits Full global capabilities Unlimited custom app development

 The price may change over time. Whenever your organization is planning to implement a marketing cloud, ask your account executive to contact marketing cloud support.

Salesforce1

Salesforce1 was announced at Dreamforce' 13 in order to take Salesforce to the next level, that is, the mobile platform. It is a platform to develop mobile applications, or in other words, you can have one platform for all your customer needs. Using Salesforce1, an organization can connect every employee, partner, product, and device with their customer using the power of social media, mobile, and the cloud. Salesforce1 is built on API-first to enable developers to build the next generation of connected apps. With 10x more APIs and services, developers can now build the next generation of social and mobile apps for employees, products, and customers faster than ever before. Salesforce1 solves the problem of lack of mobile specialists and lagging innovation with a revolutionary approach to app development for the social and mobile-first world.

Various editions of Salesforce1

The following screenshot shows the One Enterprise App and the Multi-App Bundles of Salesforce1:

The screenshot displays two pricing options for Salesforce1. The left option is 'ONE ENTERPRISE APP', described as 'Powerful enterprise apps', priced at '\$25 /user/app/month* (billed annually)'. Below this is a 'Contact me >' button and a list of services included. The right option is 'MULTI-APP BUNDLES', described as 'Run your entire business with custom cloud apps', labeled as 'BEST VALUE' and 'Build what you need as you need it'. Below this is a 'Contact for quote >' button and a description of the option as the 'Most popular option'.

ONE ENTERPRISE APP	MULTI-APP BUNDLES
Powerful enterprise apps	Run your entire business with custom cloud apps
\$25 /user/app/month* (billed annually)	BEST VALUE Build what you need as you need it
Contact me >	Contact for quote >
<p>Includes the following services:</p> <ul style="list-style-type: none"> Workflow and approval engine Point & click development Multi-language development Real-time data feeds Chatter Tools and APIs for professional developers Mobile Services & SDK Sharing and user access controls Identity management Reporting and dashboards Industry-leading trust and security Salesforce Identity Salesforce Private AppExchange 	<p>Most popular option.</p> <p>Everything you need to build multiple connected apps. Anyone can build apps anytime they have a great idea. Go faster with Salesforce.</p>



The price may change over time. Whenever your organization is planning to implement Salesforce1 ask your account executive to contact Salesforce.com support or visit <http://www.salesforce.com/in/platform/overview/> for the updated price.

The various editions of Salesforce1 are as follows:

- **One Enterprise App:** This license lets you connect to One Enterprise App. You can access the workflow, approval process, point and click development, Chatter, and Salesforce's private AppExchange. For this license, an organization has to pay 25 USD per user per license.
- **Multi-App Bundles:** This license contains all the features that developers require to build any number of connected apps. For the cost, the organization needs to contact Salesforce for a quote.



To find out more about Salesforce1 license types, visit <http://www.salesforce.com/platform/overview/>.

Salesforce.com – the most innovative company

To understand Salesforce.com's innovation in the CRM industry, we have to go more than a decade back, when other vendors used to provide CRM software as a client-server architecture model. The disadvantage of this model was that customers had to maintain their server (or servers), needed higher resources to maintain their software, and maintain traffic, and so on. In 1999, Marc Benioff came up with an idea of cloud-based CRM software (SaaS); the advantage of this model is that Salesforce.com is responsible for maintaining the server and the resources including the upgrade of all software. The best part of Salesforce CRM is the subscription-based model, which comes included with basic CRM applications such as Sales Module, Service Module, and Chatter, which can all be further customized by the users. Salesforce.com was nominated as the most innovative company of the year by Forbes for three years in a row (2011 to 2013).

Salesforce.com pushed collaboration in organizations to the next level by using Chatter; so, in 2011, Forbes nominated Salesforce.com as the most innovative company of the year. Many companies around the globe changed their way of collaboration by using Chatter. They can access Chatter anytime and anywhere by using the Chatter mobile application.

In 2012, Salesforce.com came with a different strategy to take the lead from other CRM vendors. They acquired Radian6 (the social media monitoring tools) and Buddy Media (by using this you can publish shareable content) by investing \$1 billion. These two acquisitions helped Salesforce.com form a new product known as Marketing Cloud. It helps brands to know what is trending about them across all major social networks. This was the reason for Forbes to nominate Salesforce.com as the most innovative company of that year.

In 2013, Forbes once again nominated Salesforce.com as the most innovative company of the year for the third time in a row. Showing its interest towards acquisition and promoting new ideas, Salesforce.com spent more than \$2.5 billion this year to acquire ExactTarget (a digital marketing software vendor) and Pardot (a B2B marketing automation company). This year, Salesforce.com announced their new Salesforce1 platform.

Streamlining the sales process, a chain of customer-focused steps, enables sales professionals to fundamentally increase their win rates, build customer retention, and increase revenue production. Each step consists of some key activities and has a predictable, measurable outcome.

Key problems with ancient sales processes

The following are some of the key problems that arise due to ancient sales processes:

- There is an uncertainty about information. If the sales processes are not aligned, then you are not able to pass on the correct information to the sales team at the right time. It may cause a loss of business or it may lead you to make the wrong sales decisions.
- There is no system to maintain sales. Many organizations still maintain their sales processes on paper or Excel. This means that they are not able to track won or lost causes in the system. Sales representatives are unable to assign leads to the correct team if they are not in an automated system.
- There is a lack in forecasting. Many organizations do not have a sales forecasting process, which means organizations do not have forecasting accuracy and predictability.
- There is no feedback loop. Feedback from customers is really important to improve business processes, but in older times, people had one-to-one meetings to gather feedback from customers and never had all the gathered feedback in one single place.

- Sometimes sales representatives have to wait for a long time to get approval from higher authorities if organizations are not using a centralized sales process.
- For internal collaboration, organizations are still using e-mail services.

Key points for standardized sales performance processes

The following are the key points:

- Automate your sales process by using the CRM software
- Use forecasting features to optimize your sales process
- Pass a customer's information to the sales team at the right time so that they can know more about them at critical times
- Use social media to learn more about your customers
- Improve internal collaboration by using a cloud-based system
- After the closing of every deal, the system will send a survey link to customers to gather their feedback about your sales process and sales team

Using Salesforce to streamline your business

Salesforce provides many features to streamline your business processes. Here are a few examples:

- Here, you can create different sales processes according to your business requirement (it means different sales process for different verticals and companies)
- Automatically assign leads to proper teams and queues based on your business model
- Implement the approval process to get an approval from higher authority
- Use Chatter to boost collaboration between the teams and team members
- You can send an e-mail alert and assign tasks based on business process in Salesforce; everything is automated
- Use reports and dashboards to share the correct business status with higher officials

We will discuss more about the workflow and approval process in *Chapter 6, Automating a Business Process*.

Improving collaboration in your organization

In the past, collaboration in an organization used to happen through letters, spreadsheets, or record keeping. People used to express their views, updates, and reviews through notice boards centrally located in the organization or via e-mail. Notice boards were used to express the latest happenings in an organization. As the time passed, organizations started using telephones, faxes, and telegraph to send the updates from one department to another department/person. The collaboration was a wide and vast process and used to take some days and months to exchange the latest information. The process had many steps and the failure of any step led to problems within the organization.

In the sales process, if any information was missing, it may lead to a wrong decision being taken. Imagine if the sales representatives of an organization are not updated with the latest product or a price change; this might lead to loss of profit/customers. The process was not quick and easy as one department may or may not be having proper information about one or the other. This could lead to serious problems. Likewise, suppose the marketing department is not able to explain the potential interest to a customer, which means that the organization is unable to get new customers, or is unable to get the right ideas for a new campaign.

In CRM, collaboration is the main essence in order to succeed. If any of the steps fall behind, the organization suffers. Salesforce introduced Chatter for productive collaboration in the organization and even enabled users to invite their customers to the platform to share new ideas, exchange information, and so on.

Salesforce Chatter has unique features that help organizations to become more productive. They are as follows:

- Share files
- Status update
- Invite your customers to Chatter
- Comment on status updates
- Chat
- Polls
- Create groups
- Chatter publisher actions
- Follow and unfollow people

We will discuss more about the preceding features in *Chapter 6, Automating a Business Process*.

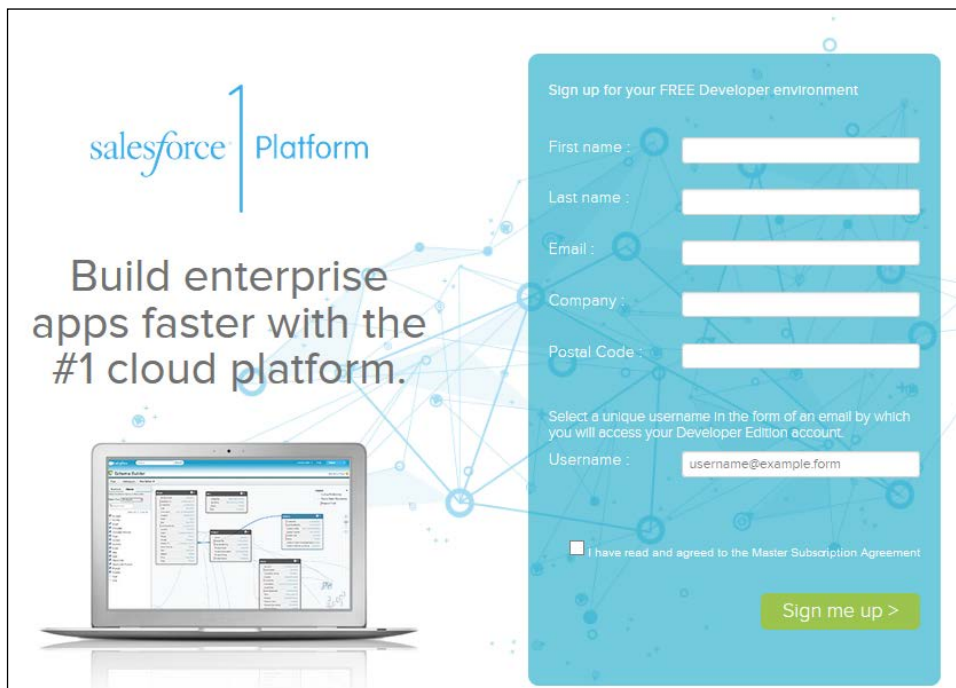
Creating a Salesforce developer account

To get started with the given topics in this book and to practice them on your own, it is recommended that you have access to a Salesforce developer account. Using Salesforce production instance is not essential for practicing. You can use Salesforce Sandbox or a developer account to practice on the examples covered in this book.

If you currently do not have your own developer account, you can create a new Salesforce developer account. The Salesforce developer account is completely free and can be used to practice newly earned concepts, but you cannot use this for commercial purposes.

To create a Salesforce developer account, follow these steps:

1. Visit <http://developer.force.com/>.
2. Click on the **Free Developer Edition** link.
3. It will open **Sign Up Page** for your free developer account, and it will display the following screen:



salesforce | Platform

Build enterprise apps faster with the #1 cloud platform.

Sign up for your FREE Developer environment

First name :

Last name :

Email :

Company :

Postal Code :

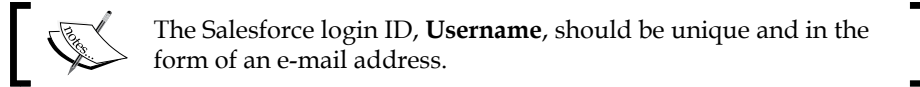
Select a unique username in the form of an email by which you will access your Developer Edition account.

Username :

I have read and agreed to the Master Subscription Agreement

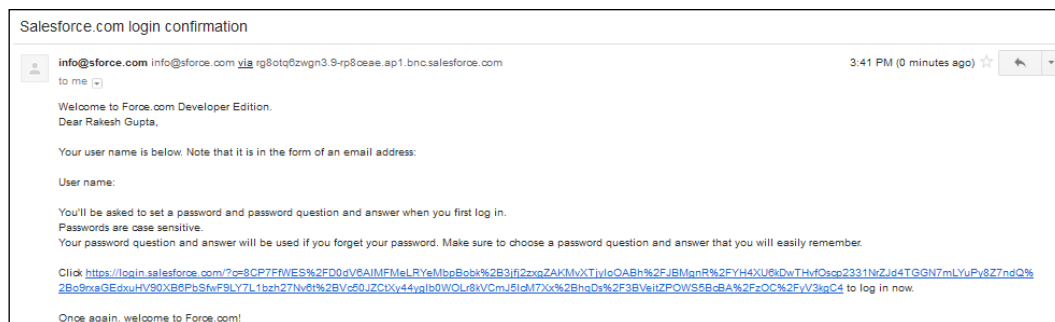
Sign me up >

4. Fill in the form and accept **Master Subscription Agreement**.
5. Click on the **Sign me up >** button.



The Salesforce login ID, **Username**, should be unique and in the form of an e-mail address.

Once you register for the developer account, Salesforce.com will send you the login details on the e-mail ID that you provided during registration. By following the instructions in the e-mail, you are ready to get started with Salesforce. The e-mail will look as shown in the following screenshot:




Once you click on the link, it will ask you to choose your password and set the security question and answer. You can use the security question if you forget the password. If you forget your password, navigate to <http://login.salesforce.com> and click on **Forgot your Password** link and enter your username. Salesforce will send a new password to your e-mail address. If your Salesforce account is locked and you are the only Salesforce administrator, then Salesforce will automatically unlock your account after 15 minutes.

Logging in to Salesforce.com

The following are the steps to log in to Salesforce.com:

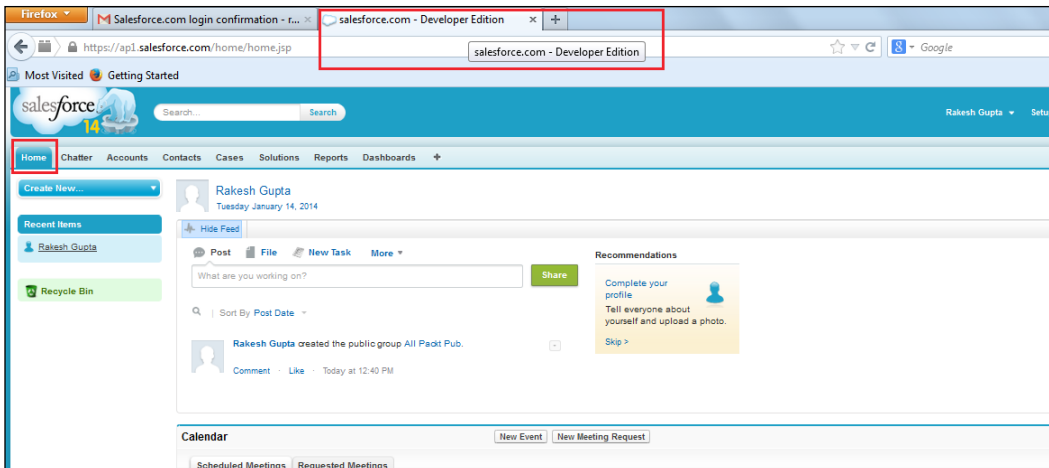
1. If you are logging in to Salesforce production or developer instance, use <http://login.salesforce.com>.
2. If you are logging in to the Salesforce Sandbox instance, then use <http://test.salesforce.com>.
3. Once the login screen is loaded, provide your username and password.
4. Salesforce may ask you to enter a verification code depending upon the organization's security and settings.

5. After verification, you will be allowed to access Salesforce, and next time, Salesforce will not ask for the verification code.

 You need to enter a verification code every time you access Salesforce from a different computer or device. We will discuss more about this in *Chapter 3, Make Your Salesforce Data Secure – Security Settings in Salesforce*.

First impression of the Salesforce developer account

Once you successfully complete the verification process, Salesforce will redirect you to the home page. The page you see the first time after logging in is known as the landing page, and if you move your mouse pointer to your browser's tab, you will be able to identify which Salesforce edition you are currently using. You can change the landing page, but we will discuss this in the later chapters. To play with your settings, you can click on the **Setup** link that is available in the top-right corner adjacent to your name on the page, as shown in the following screenshot:



Benefits of using the Salesforce developer account

There are certain benefits of using the Salesforce developer account:

- Salesforce provides it free of cost to developers as a playground for their work
- A developer account can never expire
- You can experiment with certain development activities
- You can share your application with peers by creating packages
- The developer account comes with a number of preinstalled applications such as sales, call center, marketing, and ideas
- Updates are automatically installed in your developer account; these updates include:
 - Salesforce customer portal
 - Two Salesforce CRM licenses
 - Two Salesforce mobile licenses
 - Three Salesforce platform licenses
 - Five Salesforce partner licenses
 - 10 Salesforce customer portal manager licenses

The following screenshot shows the license details of the developer organization:

User Licenses						User Licenses Help ?
Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date	
Salesforce Platform	Active	3	0	3		
Authenticated Website	Active	10	0	10		
High Volume Customer Portal	Active	10	0	10		
Customer Community Login	Active	5	0	5		
Work.com Only	Active	3	0	3		
Customer Portal Manager Custom	Active	5	0	5		
Identity	Active	10	0	10		
Silver Partner	Active	2	0	2		
Gold Partner	Active	3	0	3		
Customer Portal Manager Standard	Active	5	0	5		
Force.com - App Subscription	Active	2	0	2		
Partner App Subscription	Active	2	0	2		
Partner Community	Active	5	0	5		
Partner Community Login	Active	5	0	5		
Customer Community	Active	5	0	5		
Force.com - Free	Active	2	0	2		
Chatter Free	Active	5,000	0	5,000		
Chatter External	Active	500	0	500		
Salesforce	Active	2	1	1		

Limitations of Salesforce Developer Edition

The following are the limitations of Salesforce Developer Edition:

- For data storage, you get 5 MB and for file storage (attachments), 20 MB. To check your developer account, follow the **Name | Setup | Administration Setup | Data Management | Storage Usage** path.
- It offers 5000 API calls every 24 hours.
- You can install any number of applications in your developer account.
- A 500 MB bandwidth and 10-minute service request time limits (per rolling 24 hours) for Force.com site applications.
- You have only two Salesforce full licenses.
- You cannot use this developer account for commercial purposes. I would refer to the article at https://login.salesforce.com/help/pdfs/en/salesforce_app_limits_cheatsheet.pdf to check the limits of each edition.

Summary

In this chapter, we went through an overview of Salesforce as well as its architecture. We discussed Salesforce's various products and its available editions on the market. We also discussed how Salesforce improves the ROI experience. We learned different ways to streamline your Sales process and improve collaboration in your organization. At the end, we discussed how to create a developer account and learned its benefits and limitations. In the next chapter, we will go through various organization setup concepts such as setting up a company profile and user management concepts such as setting role and profiles for your organization.

2

User Management and Organization Administration

This chapter starts with an overview of your company's profile settings, followed by role hierarchy and profiles in Salesforce. We will also discuss permission sets, various ways to set up users for an organization, and key concepts related to it. We will learn about public groups and the queue and its significance. Later, we will go through the Freeze user concepts, how to unlock user accounts, and finally brief you about the personal setup. All these concepts are very important as they are a one-time setup and will dictate how your Salesforce organization will work in accordance with your organization structure.

The following topics will be covered in this chapter:

- Setting up company information
- Multiple currencies, and the fiscal year and customizing it
- Setting up business hours and their effects
- Holiday settings and language settings and their importance
- The significance of roles and profiles
- Permission sets
- Setting up users
- Locking and unlocking users
- Freezing a user's account
- The benefits of a login history
- Groups and their uses
- Queues and their significance
- Personal setup

Setting up company information

In the previous chapter, we went through ways to set up a developer account, the login concept, and what happens once you log in to Salesforce.com. Now, we will move forward to the next step. This feature is important as it is used to provide all the basic information about your company, such as the local address and phone numbers.

Let's start with an example. Appiuss Inc. just brought Salesforce **Enterprise Edition (EE)**. Now the managers Sara Bareilles and Robby Williams are keen to know how to update the company information, its contact details, the default time zone, and set the corporate currency.

Once the company has purchased the Salesforce organization, the company has to set up its profile. Under the heading **Company Profile** in the **Setup** tab, there are various setups available as shown in the following screenshot:



Updating the company's information

At any time, the system administrator can update the company's information in Salesforce. The company information page contains the company's address, the company's contact details, corporate currency, organization default time zone, and language and locale setting. You can also use the page to find details about licenses such as the licenses available, used, and remaining.

Let's start updating the company's information. Now the user can think why the organization has to update the company information and contact details.

This company information and contact detail page contains the organization's address, the contact person's name, and his or her contact details. Whenever the organization updates this information, it is automatically updated in the Salesforce.com database, so the Salesforce.com support people are able to contact you whenever you raise a case.

To update the company information for the organization, follow these instructions:

1. Navigate to **Setup | Administer | Company Profile | Company Information**.
2. Click on **Edit** and you will see the following screenshot:

Organization Edit

General Information

Organization Name Phone

Primary Contact Fax

Division

Address

Street

City

State/Province

Zip/Postal Code

Country

3. Now you will be able to update the organization's name, the primary contact, the contact details, and the company information.
4. Click on **Save** to update the company information.

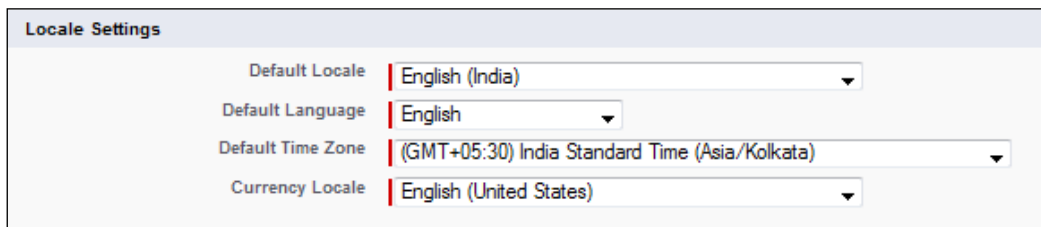
The following table provides a description of the fields available on the company information page:

Field	Description
Organization Name	Here you can enter the name of your organization. Up to 80 characters are allowed in this field.
Primary Contact	This is the person who is the main contact or administrator of the organization. Up to 80 characters are allowed in this field.
Division	The group or division that uses the service, for example, Appiuss Sales. Up to 40 characters are allowed in this field.
Fax and Phone	Here you can enter the fax and phone number. Up to 40 characters are allowed in this field.
Address (Street, City, State/Province, Zip/Postal Code, Country)	In these fields, you can define the organization address.

Locale setting

Under the **Locale Setting** tab, the user can update the **Default Locale**, **Default Language**, **Default Time Zone**, and **Currency Locale** fields for the organization. To update this information, follow these steps:

1. Click on the **Setup** option.
2. Navigate to **Administer | Company Profile | Company Information**.
3. Click on **Edit**.
4. Go to the **Local Settings** tab and you will see the following screenshot:



The screenshot shows a form titled "Locale Settings" with four dropdown menus:

Default Locale	English (India)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	English (United States)

5. Change the details as per your organization's policy.
6. Click on **Save** to update the company information.

Let's start with an example. Sara Bareilles says to the system administrator (Sagar Pareek and Rakesh Gupta), "What is the benefit of these changes? Where will the changes be reflected?"

These changes are the default for the organization, and whenever you create a user, these values arrive as the default. However, you can change the values for these fields. The locale settings determine the following display formats:

- Date and time
- Users' names
- Addresses
- Commas and periods in numbers



Selecting locale names (with the country in parentheses) will set the default currency. Only the languages available here will be enabled for your organization. Selecting the default time zone in which the organization is located will set default time zone. Currency locale affects the format of the currency amount and is available for single currency organizations only.

Salesforce.com newsletter and login notification settings

Here, the administrator is able to choose whether he or she wants to receive user-targeted promotional e-mails from Salesforce.com:

The screenshot shows the 'salesforce.com Newsletter Settings' section with two unchecked checkboxes: 'Users receive the salesforce.com newsletter' and 'Users receive the salesforce.com admin newsletter'. Below this is the 'Login Notifications' section with two unchecked checkboxes: 'Hide Notices About System Maintenance' and 'Hide Notices About System Downtime'.

The following points describe the login information options available in Salesforce:

- **Hide Notices About System Downtime:** Once you tick this checkbox, users will not get any advance notice of planned system downtime when they are logged in to Salesforce
- **Hide Notices About System Maintenance:** Once you tick this checkbox, users will not get any advance notice of planned system maintenance when they are logged in to Salesforce

Corporate currency

You are able to define corporate currency for your organization. Corporate currency is the revenue that is reported by the organization's corporate headquarters. These features are enabled for organizations that use multiple currencies; otherwise, it shows the organization's local currency. If your organization Australia, it will be AUD, for example. This is an important feature as it determines the currency in which your organization transacts.

Additional features

In addition to providing the ability to update company-related information, the company information page also provides information on the data and file space used, API requests in the last 24 hours, and so on, as shown in the following screenshot:

Used Data Space	112 KB (0%)	[View]
Used File Space	242 KB (0%)	[View]
API Requests, Last 24 Hours	0 (25,000 max)	
Streaming API Events, Last 24 Hours	0 (1,000 max)	
Restricted Logins, Current Month	0 (0 max)	
Salesforce.com Organization ID		



In the organization detail section, there is also the Salesforce.com organization ID. This ID is unique for each Salesforce.com organization and uniquely identifies the instance. The Salesforce.com organization ID might be required while communicating with the Salesforce.com support team, especially when activating limited and feature activations.

Viewing the licenses

The company information page also displays all the user licenses, feature licenses, and permission set licenses that you have purchased for your organization. On the company information detail page, the user can find detailed information about these licenses as follows:

- **User license type:** This license type allows a user to use different functionalities within Salesforce and determines which profiles and permission sets are available to the user. You may have more than one type of user license in your organization.
- **Permission set license type:** You can assign permission sets to give a user access to certain features. However, sometimes permission sets require users to have a permission set license before they can be allotted the permissions in question.
- **Feature license type:** This license type allows a user to use an additional Salesforce feature such as marketing or connecting offline.



Depending on the features that are enabled for your organization, you might be able to assign more than one type of feature license to users.

This related list gives more information for each type of license:

- **Status:** This indicates the status of the license. It should be active or inactive.
- **Total licenses:** This indicates the number of licenses that your company is paying for and that are available to you.
- **Used licenses:** This is the number of licenses that you have assigned to users.
- **Remaining licenses:** This is the number of unused licenses.

In addition to the license types, the following portal login information is listed for organizations that have customer portals or partner portals enabled:

- **Monthly Logins Allotted:** This shows the maximum number of customers or partners portal logins allowed per month.
- **Monthly Logins Used:** This indicates the number of successful logins for all the users associated with a customer or partner portal user license for the month.

User license type

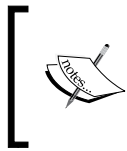
The following license types are currently available for purchase:

License name	Description
Salesforce	This gives full access to standard CRM and AppExchange apps. Users can access both standard and custom apps. Each license has its own additional storage for Enterprise, Unlimited, and Performance Editions.
Salesforce Platform	This gives access to custom apps but not to the standard CRM functionality. With this license, users can access the accounts, contacts, reports, and dashboards, and AppExchange apps. This license type is cheaper than the Salesforce license.
Force.com One App	This license is for users who want to access only one custom application; by using this license, users don't have access to the standard Salesforce CRM features. This license type is cheaper than the Salesforce license. Each Force.com One App license provides an additional 20 MB of data storage and 100 MB of file storage, regardless of the Salesforce Edition.

License name	Description
Force.com App Subscription	<p>By using this license type, organizations can grant users access to a Force.com Light App or Force.com Enterprise App, neither of which include the CRM functionality.</p> <p>A Force.com Light App has up to 10 custom objects and 10 custom tabs, it has a read-only access to accounts and contacts, and supports object-level and field-level security. A Force.com Light App can't use the Bulk API or Streaming API.</p> <p>A Force.com Enterprise App has up to 10 custom objects and 10 custom tabs. In addition to the permissions of a Force.com Light App, a Force.com Enterprise App supports record-level sharing, can use the Bulk API and Streaming API, and has read/write access to accounts and contacts.</p> <p>Each Force.com App Subscription license provides an additional 20 MB of data storage and 100 MB of file storage, regardless of the Salesforce edition.</p>
Knowledge Only User	<p>An organization can use this type of license to provide access to the Salesforce Knowledge app. This license provides access to the tabs: articles, article management, Chatter, Chatter files, home, profiles, reports, custom objects, and custom tabs.</p>
Identity	<p>Organizations can use this type of license to grant users access to identity features such as the App Launcher. This is included with all paid user licenses in Enterprise, Performance, and Unlimited Editions. Ten free Identity user licenses are included with each new Developer Edition.</p>
Chatter Free	<p>This license works for Performance, Enterprise, and Personal Edition users who don't have Salesforce license but want to access Salesforce Chatter. By using this license, users can access all the Chatter features but they can't access standard Salesforce objects.</p> <p>This license is cheaper than a Salesforce license so organizations use this license to save money.</p>
Chatter External	<p>This license type allows us to invite our customer into Chatter. This license has very limited Chatter access. Users can only see the groups they are invited to and can interact with members of that group.</p> <p>This license is cheaper than a Salesforce license so organizations use this license to save money.</p>
Chatter Only	<p>This license works with Performance, Enterprise, and Personal Edition users who don't have the Salesforce license and want to use Salesforce objects in addition to Salesforce Chatter.</p>

License name	Description
Work.com Only User	This license works with Performance, Enterprise, and Personal Edition users who don't have a Salesforce license and need access to Work.com.
Company Community	<p>This is an internal user license designed for users to access Force.com Light application custom objects, custom tabs, Chatter (people, groups, feeds, and files), and Community that includes a Site.com site.</p> <p>Company Community users have read-only access to Salesforce Knowledge articles and limited access to cases in order to create and read their own cases. They can also:</p> <ul style="list-style-type: none"> • Access up to 10 custom objects and 10 custom tabs • Use content, ideas, and answers • Use activities, tasks, calendars, and events • Have read-only access to accounts and contacts

To view all the company information, a user must have the **View Setup and Configuration** permission and to make any changes in it, the **Customize Application** permission is required.



You can check the latest licenses available at https://help.salesforce.com/HTViewHelpDoc?id=users_understanding_license_types.htm&language=en_US as the above mentioned license types are subject to change.

Multiple currencies

Let's start with an example. Sara Bareilles is the Salesforce administrator at Appiuss Inc. Her company has sales representatives across the globe and deals coming in equally from the American, Asia-Pacific, and Europe/Middle-East regions. Currently, only the USD currency is enabled for her organization, so the sales reps are finding it difficult to enter the right amount in their local currency.

Multi-currency is a Salesforce limited and advance feature. After enabling it, the sales reps enter the amount in the **Opportunity** field in their local currency. Organizations can use multiple currencies in opportunities, forecasts, reports, quotes, and other currency fields. The administrator can set the corporate currency that reflects the currency of the corporate headquarters. The administrator also maintains a list of active currencies and their conversion rates relative to the corporate currency.

So, Sara Bareilles decides to enable multiple currencies. She contacts Salesforce.com Support and has it enabled a few days later in her Sandbox.

Enabling a single currency

In a single currency organization, you can set the organization-wide currency locale for your company but your Salesforce users cannot set individual currency locales.

Enabling multiple currencies

To enable multiple currencies in your organization, follow these instructions:

1. Click on the **Help and Training** link in the top-right corner of the page. This opens a new page in the window.
2. Click on **Contact Support** followed by the open a case icon.
3. Fill in the form as shown in the following screenshot and in the **Product Topics** field, select **Limits & Feature Activations**:

The screenshot shows the 'New Case Detail' form in Salesforce. The form is titled 'New Case Detail' and has a light blue header. Below the header, there are several fields and sections:

- Name:** Rakesh Gupta
- Account Name:** Trial 00D9000000nqYHEAY
- Status:** New
- Case Description:** A section with a red link 'Description of Product Topics'.
- I need assistance with:** CRM (dropdown menu)
- Product Topics:** Limits & Feature Activations (dropdown menu)
- Subject:** Want to enable Multiple Currencies (text input field)
- Description:** Hi Team, Our organization is interested to enable multiple currencies. Regards, *ARUN*
- Severity Level:** Level 3 - High (dropdown menu)
- Business Impact:** A section with a list of questions: 1) What % of your users are affected? 2) Does this affect data integrity? 3) Do you have a viable workaround? 4) Does this affect critical application functionality? 5) What business functionality are you unable to perform? Below the list is a text input field and a note: 'To ensure proper handling of your case, please enter the business impact.'

At the bottom of the form, there are two buttons: 'Cancel' and 'Next'.

4. In the **Business Impact** area, give a proper reason for every question.
5. Click on **Next** and submit the case.
6. You will get an e-mail in which the administrator of the organization will have to provide the following details:
 - Organization ID
 - Default currency
 - Confirmation that you understand that multiple currencies can't be disabled once enabled
 - Confirmation that you are a system administrator authorized on behalf of your organization to request multi-currency enablement and that you consent to the lockout of this organization for a certain period of time, depending on your organization's data usage volume
7. Once you answer the e-mail, the multiple currencies feature will be enabled by Salesforce.com.

Adding a new currency

At any time, the system administrator can add a new currency to the organization. To do so, follow these steps:

1. Navigate to **Setup | Administer | Company Profile | Manage Currencies**.
2. Click on **Add New** to add a new currency. It will redirect you to a new window where you can add new currency to your organization.
3. To do this, you have to select **Currency Type**, **Conversion Rate** (find it from any exchange website), and **Decimal Places**:

Currency Edit

New Currency

Enter information for the new currency. Note that you cannot delete a currency once you activate it.

Currency Type Edit

New Currency

Pick a new currency from the available list.

Currency Type | GBP - British Pound

Conversion Rate

Enter the conversion rate from your corporate currency to this new currency.

Conversion Rate | 105

Decimal Places

Enter decimal places (number of digits to the right of decimal point) allowed when displaying data in this new currency. It must be an integer with value between 0 and 6.

Decimal Places | 2

Save Save & New Cancel

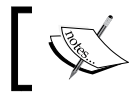
Changing the corporate currency

At any time, the system administrator can change the corporate currency of the organization. To do this, follow these steps:

1. Navigate to **Setup | Administer | Company Profile | Manage Currencies**.

Active Currencies						
Action	Currency Code	Currency Name	Corporate	Conversion Rate	Decimal Places	Last Modified By
Edit Deactivate	GBP	British Pound	<input type="checkbox"/>	105.000000	2	Rakesh Gupta , 1/25/2014 6:47 PM
Edit Deactivate	INR	Indian Rupee	<input type="checkbox"/>	55.000000	2	Rakesh Gupta , 6/30/2013 9:24 AM
Edit Deactivate	MAD	Moroccan Dirham	<input type="checkbox"/>	78.000000	2	Rakesh Gupta , 12/24/2013 11:00 AM
Edit Deactivate	USD	U.S. Dollar	<input checked="" type="checkbox"/>	1.000000	2	Rakesh Gupta , 10/14/2012 7:35 PM

2. Click on **Change Corporate**.
3. It will redirect you to a new window where you can select a new corporate currency for your organization.



A new corporate currency dropdown shows only those currencies that are currently active for the organization.

Effects of enabling multi-currency

The following are the effects of enabling multi-currency:

- Multi-currency cannot be disabled once enabled.
- All records have a default currency stamped that you mentioned at the time of enabling it.
- Objects such as opportunities, opportunity products, opportunity product schedules, and campaign opportunities include fields that are multi-currency compatible, which allows a specific currency for the record. The main use of such fields is to specify the primary amount.
- After multi-currency is enabled, all currency fields show the ISO code before the field value, for example, \$50 is USD 50.
- Once the currency is added to the supportive currency list, it can't be removed from the administrator's currencies list, even when it is deactivated.
- Users can set their own personal default currency, which is known as the secondary currency. In reports (while running a report for the user), the primary default currency is shown as the organization's default corporate currency and the user's personal currency is shown as the secondary currency.

Fiscal year and its customization

A fiscal year or financial year is a period of time used to calculate annual (yearly) financial statements in businesses and other organizations. The system administrator can set the fiscal year for your organization. The fiscal year settings are used to report on the fiscal year timeline.

Salesforce supports two types of fiscal years:

- Standard fiscal year
- Custom fiscal year

Standard fiscal year

Salesforce provides the Gregorian calendar as the standard fiscal year calendar by default. But this is not the same for every organization as some organizations use different calendars and need to change the fiscal year start month, for example, for the fiscal year starting in April, the standard fiscal year is used. Standard fiscal years can start on the first day of any month. Additionally, it can be defined whether the fiscal year is based on the start or end of the selected month.

To set up a standard fiscal year for your organization, follow these steps:

1. Navigate to **Setup | Administer | Company Profile | Fiscal Year**.
2. Select the option of **Standard Fiscal Year**.
3. Select the start month for the fiscal year.
4. Choose whether the fiscal year is defined based on the end or start of the month as shown in the following screenshot:

The screenshot shows the 'Fiscal Year Information' configuration page in Salesforce. The page has a left sidebar with 'Standard Fiscal Year' selected. The main content area includes a warning message about quarterly forecast periods, a 'Change Fiscal Year Period' section with 'Save' and 'Cancel' buttons, and an 'Apply FY Changes to Customizable Forecasting and Reports' section. The 'Name' is 'Sales & Service Cloud Consultant'. The 'Fiscal Year Start Month' is set to 'April'. Under 'Fiscal Year is Based On', 'The ending month' is selected with a radio button, and 'The starting month' is unselected.

5. Optionally, you can select **Apply to all Forecasts and Quotas** if you want to apply the new fiscal year settings to your existing forecasts and quotas. This option may or may not be available depending on your forecast settings.
6. Click on **Save**.

Custom fiscal year

The custom fiscal year option is used when the standard fiscal year does not meet the organization's requirements. To use the custom fiscal year, the system administrator has to enable it. Complex fiscal year structures can be achieved using the custom fiscal year option. Enabling custom fiscal years does not automatically define them. You must define all of your company's custom fiscal years so that they fit your company's calendar.

To set up a custom fiscal year for your organization, follow these steps:

1. Navigate to **Setup | Administer | Company Profile | Fiscal Year**.
2. Select the option of **Custom Fiscal Year**.
3. Select the checkbox next to the statement **Yes, I understand the implications the custom fiscal year feature has on my organization and I want to enable it**.
4. Click on **Enable Custom Fiscal Years**.
5. Click on **OK**.



Enabling custom fiscal years is not reversible. After enabling custom fiscal years, you cannot revert to standard fiscal years.

Defining a new custom fiscal year

To define a new custom fiscal year for your organization, follow these steps:

1. Navigate to **Setup | Administer | Company Profile | Fiscal Year**.
2. Click on **New**. It will open a **Custom Fiscal Year Template** window to set up a new custom fiscal year:

Select Fiscal Year Structure

Choose one of the following templates and click Continue. These templates will be used as the basis for a fiscal year structure which you will be able to customize. For more information on the templates and fiscal year customization, see [Custom Fiscal Year Templates](#) in the online help.

Template Type	Template Description
4 Quarters per Year, 13 Weeks per Quarter	
<input type="radio"/> 4-4-5	Within each quarter, period 1 has 4 weeks, period 2 has 4 weeks, and period 3 has 5 weeks
<input type="radio"/> 4-5-4	Within each quarter, period 1 has 4 weeks, period 2 has 5 weeks, and period 3 has 4 weeks
<input type="radio"/> 5-4-4	Within each quarter, period 1 has 5 weeks, period 2 has 4 weeks, and period 3 has 4 weeks
13 Periods per Year, 4 Weeks per Period	
<input type="radio"/> 3-3-3-4	Quarter 1 has 3 periods, quarter 2 has 3 periods, quarter 3 has 3 periods, and quarter 4 has 4 periods
<input type="radio"/> 3-3-4-3	Quarter 1 has 3 periods, quarter 2 has 3 periods, quarter 3 has 4 periods, and quarter 4 has 3 periods
<input type="radio"/> 3-4-3-3	Quarter 1 has 3 periods, quarter 2 has 4 periods, quarter 3 has 3 periods, and quarter 4 has 3 periods
<input type="radio"/> 4-3-3-3	Quarter 1 has 4 periods, quarter 2 has 3 periods, quarter 3 has 3 periods, and quarter 4 has 3 periods
Gregorian Calendar	
<input checked="" type="radio"/> 12 Months/Year	Standard Gregorian Calendar

3. In the template window, you can choose a template type based on your needs. Click on **Continue** and you are done.
4. The next step is to set the fiscal year start date. For this, enter the fiscal year name and choose the start day of the week. Here, you can reset the fiscal year structure as well.
5. Click on **Save**.



Before enabling the custom fiscal years, make sure that you have exported any data related to the fiscal periods.

Business hours setup and its effect

Business hours are the hours of the day in which business is generally conducted. These are especially applicable for the customer support team to track the operating hours of the customer support. For your Salesforce organization, you can configure multiple business hours. Business hour settings apply to case-related information about escalation rules and case milestones in the entitlement processes.

Once the business hours are set, they can be used to set the time at which a support team will be available to work on the case. Business hours can also be specified when making the escalation rules. Setting the business hours on the escalation rules, results in the case getting automatically updated and escalated when the escalation rules are within the time and location of the rule.

Let's assume that your organization's working hours are from 8:00 a.m. to 5:00 p.m. and a case is raised at 4:00 p.m. The escalation time for this case is 2 hours if the case is not resolved. So if the business hours are not set up for your organization, then the case will be escalated at 6:00 p.m. By default, business hours are set to 24 hours, seven days a week in the default time zone specified in your organization's profile.

Setting up the business hours and its effects

To set up the business hours for your organization, follow these steps:

1. Navigate to **Setup | Administer | Company Profile | Business Hours**.
2. Click on the **New Business Hour** button.

Organization Business Hours

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

Business Hours Edit

Save Cancel

Step 1. Business Hours Name

Business Hours Name Use these business hours as the default

Active

Step 2. Time Zone

Time Zone

Step 3. Business Hours

Sunday	<input type="text" value="HH:MM"/>	to	<input type="text" value="HH:MM"/>	<input type="checkbox"/>	24 hours
Monday	<input type="text" value="8:00 AM"/>	to	<input type="text" value="5:00 PM"/>	<input type="checkbox"/>	24 hours
Tuesday	<input type="text" value="8:00 AM"/>	to	<input type="text" value="5:00 PM"/>	<input type="checkbox"/>	24 hours
Wednesday	<input type="text" value="8:00 AM"/>	to	<input type="text" value="5:00 PM"/>	<input type="checkbox"/>	24 hours
Thursday	<input type="text" value="8:00 AM"/>	to	<input type="text" value="5:00 PM"/>	<input type="checkbox"/>	24 hours
Friday	<input type="text" value="8:00 AM"/>	to	<input type="text" value="5:00 PM"/>	<input type="checkbox"/>	24 hours
Saturday	<input type="text" value="HH:MM"/>	to	<input type="text" value="HH:MM"/>	<input type="checkbox"/>	24 hours

Save Cancel

3. Enter data in the **Business Hours Name** field and select the **Active** checkbox to activate it. Optionally, select **Use these business hours as the default** to set the business hours as the default business hours on all new cases.
4. Select **Time Zone** and define the working hours from Sunday to Saturday (by default, the **24 hours** checkbox is selected next to each day, so deselect it and enter the business hours). You can leave the **Business Hours** field blank.



Salesforce automatically calculates daylight saving time for the time zones available for the business hours. It helps you to calculate the correct case age.

Holiday settings

Let's start with an example. Sara Bareilles is working as a support agent in a company. She is resolving an ample amount of cases per day, and the response time for every case is 3 hours. Now, she is worried because April 18 is a holiday for Good Friday and if cases come in on that day, they will be escalated to the manager.

Holiday settings define that your organization is not working on that day. If some cases are raised on that day and waiting for a service agent response, Salesforce will not count that day as a working day and the case will not be escalated.

Setting up the holiday settings

To set up the holiday settings for your organization, follow these steps:

1. Navigate to **Setup | Administer | Company Profile | Holidays**.
2. Click on the **New** button.

3. Enter data in the **Holiday Name**, **Description**, **Date**, and **Time** fields. You can set recurring holidays as well. To do that, select the **Recurring Holiday** checkbox and fill in the **Frequency**, **Start Date**, and **End Date** fields:

Holiday Detail

Holidays are dates and times at which business hours are suspended.

Enter the dates and times at which to suspend business hours and escalation rules associated with business hours.

Holiday Detail [Save] [Cancel]

Holiday Name: Good Friday
Description: Good Friday
Date: 4/18/2014
Time: from [] to [] All Day
Recurring Holiday:

Frequency: Daily On every April 18 Weekly On the 1st day of January Monthly Yearly
Start Date: 4/18/2014
End Date: [] No End Date

[Save] [Cancel]

4. Click on **Save**.

Associating holidays with business hours

You can associate holidays with business hours so that Salesforce can suspend any escalation rules associated with it. There are two ways to associate business hours and holidays.

Method 1 – associate business hours with holidays

To associate business hours with holidays, follow these steps:

1. Navigate to **Setup | Administer | Company Profile | Holidays**.
2. Click on the holiday from the **Holidays** list.

Holidays

Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.

Action	Holiday Name	Description	Date and Time
Edit Del	Good Friday	Good Friday	4/18/2014 All Day ↻
Edit Del	May Day	May Day	5/1/2014 All Day ↻

3. It will open the **Holidays** detail page.
4. Click on **Add/Remove** from the **Business Hours** list.
5. In addition, add any **Business Hours** as per your needs.

Business Hours for Holiday
Good Friday

Choose the business hours to which this holiday applies.

Business Hours Save Cancel

Available Business Hours		Selected Business Hours
Default		Working time
	Add ▶	
	Remove ◀	

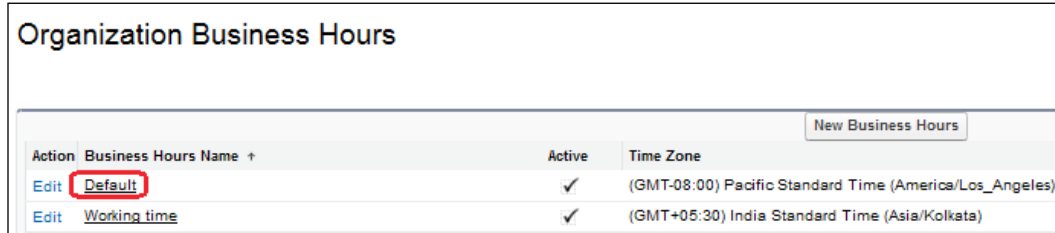
Save Cancel

It will associate one holiday with multiple business hours.

Method 2 – associate holidays with business hours

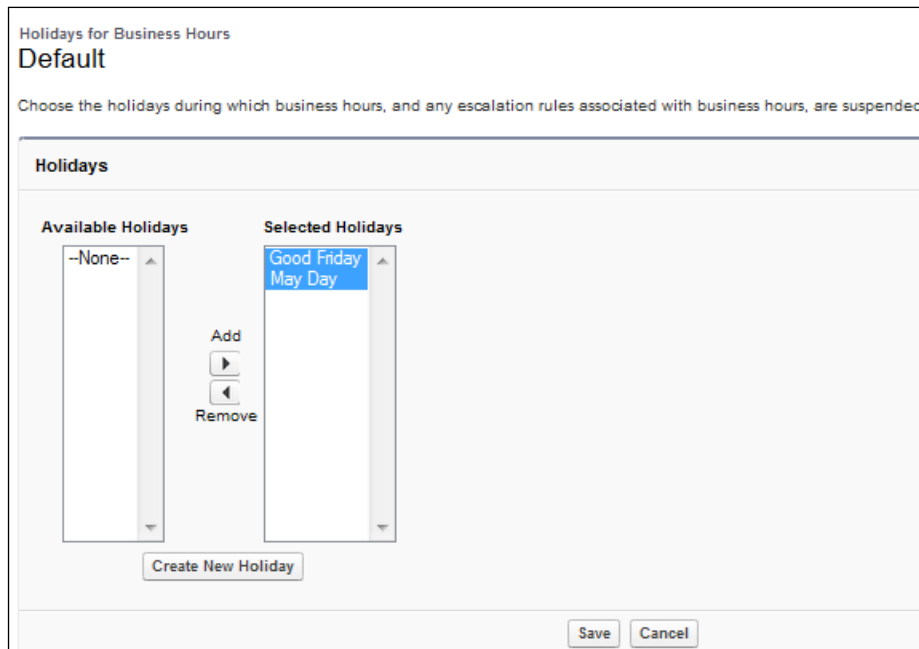
Another way to associate holidays with business hours is from the business hours instead. To associate holidays with business hours, follow these steps:

1. Navigate to **Setup | Administer | Company Profile | Business hours**.
2. Click on the **Business Hours** option from the available list:



Action	Business Hours Name	Active	Time Zone
Edit	Default	✓	(GMT-08:00) Pacific Standard Time (America/Los_Angeles)
Edit	Working time	✓	(GMT+05:30) India Standard Time (Asia/Kolkata)

3. It will open **Business Hours** detail page.
4. From the **Holidays** list, click on the **Add/Remove** button.
5. It will redirect you to the next screen where you can associate the current business hours with multiple holidays:



Holidays for Business Hours
Default

Choose the holidays during which business hours, and any escalation rules associated with business hours, are suspended.

Holidays

Available Holidays | **Selected Holidays**

--None-- | Good Friday
May Day

Add
Remove

Create New Holiday

Save Cancel

This will associate multiple holidays with one business hour.

Language settings and its importance

As Salesforce is being used across the globe and we all use different languages to communicate, Salesforce supports multiple languages. The Salesforce web user interface, Salesforce for Outlook, Connect for Outlook, Connect Offline, and Connect for Office are all available in various languages.

The Salesforce web user interface supports two language settings.

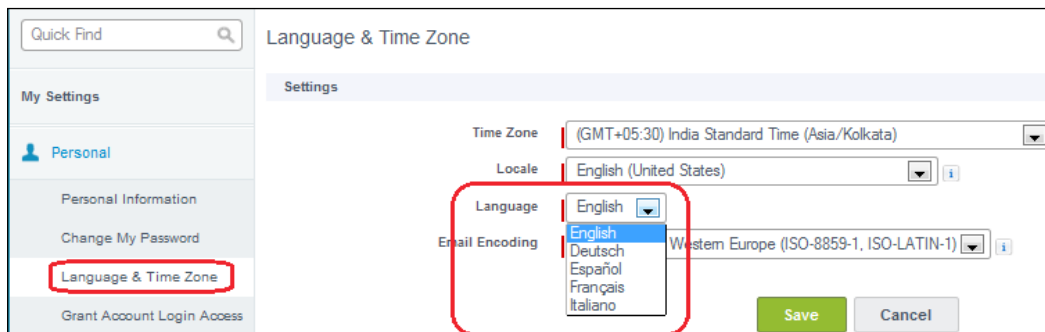
Personal settings

Let's start with an example. Robby Williams is a new hire from Russia. The default organization language is set to English, which means all the text and online help are displayed to all the new users in English. Robby Williams would like to change his complete user interface to Russian.

Users can change the default language to their local language to display the Salesforce text, images, buttons, and online help.

To change to your personal language, follow these steps:

1. Navigate to **Name | My Setting | Personal | Language & Time zone**.
2. Then, select the language from the **Language** drop-down list:



You can find more information about the language Salesforce supports as the standard language in the information box.



If you are not able to find your preferred language, then contact your system administrator to enable it. In the preceding example, the system administrator enabled the English, Deutsch, Español, Français, and Italiano languages for the organization so that users can get these options under the **Language** drop-down list.

Organization's default language settings

A system administrator can enable multiple languages for your Salesforce organization. This means users have the option to select their preferred language from the available list.

Salesforce offers three levels of language support, as follows:

- Fully supported languages
- End user languages
- Platform-only languages

Fully supported languages

Fully supported languages, such as Thai, Russian, English, or Danish, are the ones where the user functionality and help pages in the application are completely translated into these languages.



The fully-supported languages list includes Chinese (simplified), Chinese (traditional), Danish, Dutch, English, Finnish, French, German, Italian, Japanese, Korean, Portuguese (Brazil), Russian, Spanish, Swedish, and Thai. Even though the Salesforce interface is completely translated to Thai, the help page remains in English.

End user languages

End user languages are useful when you are working in a multilingual organization where you speak a language that is different than your headquarters. End user languages are used by users who would like to access the app in that language, but do not want to access the **Setup** menu.

Let's start with an example. A company has its headquarters in a French-speaking country, but that company has non-admin employees in other countries that would prefer to use the app in a language supported as an EUL. As they do not want to access the **Setup** menu and help pages, the EUL settings provide sufficient translations out of the box to suit their needs.



The end user languages list includes Arabic, Bulgarian, Czech, English (U.K.), Greek, Spanish (Mexico), Hebrew, Hungarian, Indonesian, Norwegian, Polish, Romanian, Turkish, Ukrainian, and Vietnamese.

Enabling an end user language

To enable an end user language for your organization, follow these steps:

1. Navigate to **Setup | Administer | Company Profile | Language Settings**.
2. From the **Language Preferences** section, select the **Enable End User Languages** checkbox to enable it:

Language Settings

Language Preferences

Enable End User Languages - Help and Admin Setup are not translated in End User Languages
Spanish (Mexican), Hungarian, Polish, Czech, Turkish, Indonesian, Romanian, Vietnamese, Ukrainian, Hebrew, Greek, Bulgarian, English (UK), Arabic, Norwegian

Enable Platform Only Languages - No default translations are provided for Platform Languages
French (Canadian), Georgian, Serbian (Cyrillic), Serbian (Latin), Slovak, English (Australian), English (Malaysian), English (Indian), English (Philippines), English Macedonian, Latvian, Lithuanian, Estonian, Albanian, Montenegrin, Maltese, Irish, Basque, Welsh, Icelandic, Portuguese (European), Malay, Tagalog, Luxembourg

Add or remove languages from the Available Language list

Available Languages

- Spanish (Mexican)
- Hungarian
- Polish
- Czech
- Turkish
- Indonesian
- Romanian
- Vietnamese
- Ukrainian
- Hebrew
- Greek
- Bulgarian
- English (UK)
- Arabic

Displayed Languages

- English
- German
- Spanish
- French
- Italian
- Japanese
- Swedish
- Korean
- Chinese (Traditional)
- Chinese (Simplified)
- Portuguese (Brazilian)
- Dutch
- Danish
- Thai

Languages that appear in gray are currently used by your company, users, or both. They cannot be deactivated.

Save Cancel

3. Then, it will add all the end user languages to the available language multi-select picklist.
4. Click on **Save**.

Platform-only languages

Platform-only languages are used to localize the custom functionality (apps) built on the Salesforce Platform. The platform-only languages allow organizations to provide their own translations via the translation workbench for languages that Salesforce doesn't provide any translations for.



The platform-only languages list includes Albanian, Armenian, Basque, Bosnian, Croatian, English (Australia), English (Canada), English (India), English (Malaysia), English (Philippines), Estonian, French (Canada), Georgian, Hindi, Icelandic, Irish, Latvian, Lithuanian, Luxembourgish, Macedonian, Malay, Maltese, Moldovan, Montenegrin, Portuguese (European), Romansh, Serbian (Cyrillic), Serbian (Latin), Slovak, Slovenian, Tagalog, Urdu, and Welsh.

Enabling the platform-only languages

To enable the platform-only languages for your organization, follow these steps:

1. Navigate to **Setup | Administer | Company Profile | Language Settings**.
2. From **Language Preferences**, select **Enable Platform Only Languages**:

Language Preferences

Enable End User Languages - Help and Admin Setup are not translated in End User Languages
Spanish (Mexican), Hungarian, Polish, Czech, Turkish, Indonesian, Romanian, Vietnamese, Ukrainian, Hebrew, Greek, Bulgarian,

Enable Platform Only Languages - No default translations are provided for Platform Languages
French (Canadian), Georgian, Serbian (Cyrillic), Serbian (Latin), Slovak, English (Australian), English (Malaysian), English (Indian), Macedonian, Latvian, Lithuanian, Estonian, Albanian, Montenegrin, Maltese, Irish, Basque, Welsh, Icelandic, Portuguese (European)

Add or remove languages from the Available Language list


Available Languages	Displayed Languages
Spanish (Mexican)	English
Hungarian	German
Polish	Spanish
Czech	French
Turkish	Italian
Indonesian	Japanese
Romanian	Swedish
Vietnamese	Korean
Ukrainian	Chinese (Traditional)
Hebrew	Chinese (Simplified)
Greek	Portuguese (Brazilian)
Bulgarian	Dutch
English (UK)	Danish
Arabic	Thai

Languages that appear in gray are currently used by your company, users, or both. They cannot be deactivated.

Save Cancel

3. This will add all the end user languages to the available language multi-select picklist.
4. Click on **Save**.

Once you enable the platform-only language, Salesforce will enable the end user language automatically.

 What happens when the system administrator changes the organization's default language from English to Russian if the user's personal language preference is already set as Russian?
The user will still see Salesforce in Russian. If a personal preference is not set, then Salesforce will automatically change everything from English to Russian.

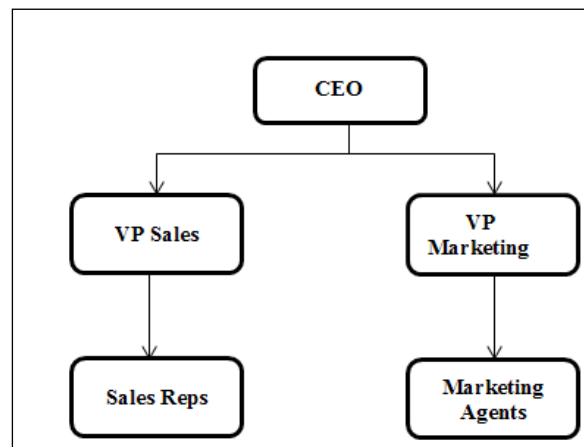
The significance of roles and profiles

In this section, we will discuss roles, profiles, and their significance in Salesforce.


Significance of the role hierarchy

By using roles in Salesforce, you can control the data/records access and organization reports. In simpler terms, you can use it to control record-level access in Salesforce. It describes how roles connect to each other. It may or may not be similar to your organization hierarchy. A role can have one, more than one, or even no users assigned to it. It is a good practice to ensure that every user is assigned a role when first added to the system.

The users who are higher in the role hierarchy will be able to see the records of people below them. Users who share the same role or are at the same level (**VP Sales** and **VP Marketing**) cannot access each other's records:



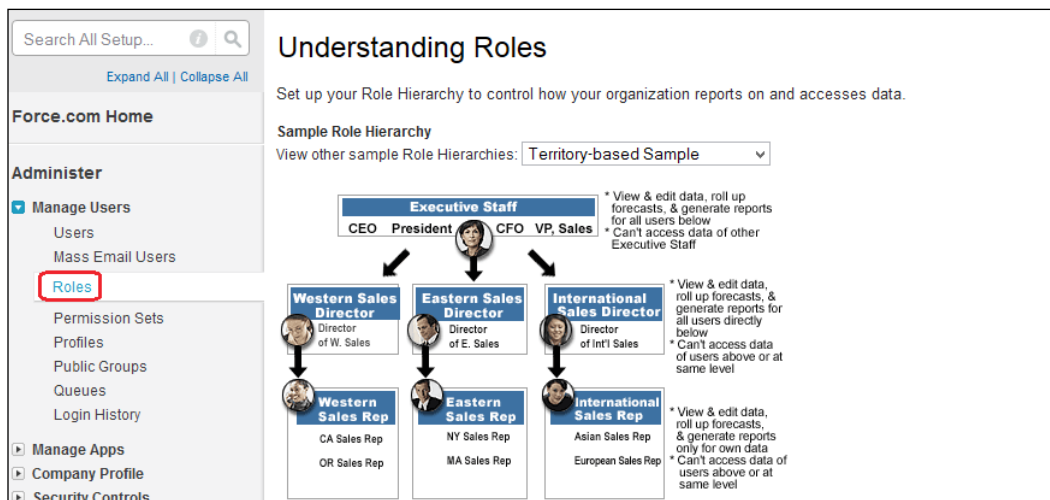
In the preceding image, the **CEO** can see all the organization records as they are at the top of the role hierarchy. At the same time, **VP Sales** and **VP Marketing** can't see each other's records even though both are at the same level, but **VP Sales** can access **Sales Reps** records and **VP Marketing** can access **Marketing Agents** records. **Sales Reps** and **Marketing Agents** can see only their records as these roles are lower in the role hierarchy. Users at any given role level can view, edit, and report all the data owned by or shared with users below them in the role hierarchy.

 In the preceding example, it is assumed that **Organization-Wide Default (OWD)** is private for objects. We will discuss more about OWD in *Chapter 3, Make your Salesforce Data Secure – Security Settings in Salesforce*.

Creating the role hierarchy for your organization

To create the role hierarchy for your organization, follow these steps:

1. Navigate to **Setup | Administer | Manage Users | Roles**.
2. Click on **Set up Roles** to go to the **Creating the Role Hierarchy** page:



Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy
View other sample Role Hierarchies: Territory-based Sample

Executive Staff
CEO President CFO VP, Sales
* View & edit data, roll up forecasts, & generate reports for all users below
* Can't access data of other Executive Staff

Western Sales Director
Director of W. Sales

Eastern Sales Director
Director of E. Sales

International Sales Director
Director of Int'l Sales

Western Sales Rep
CA Sales Rep
OR Sales Rep

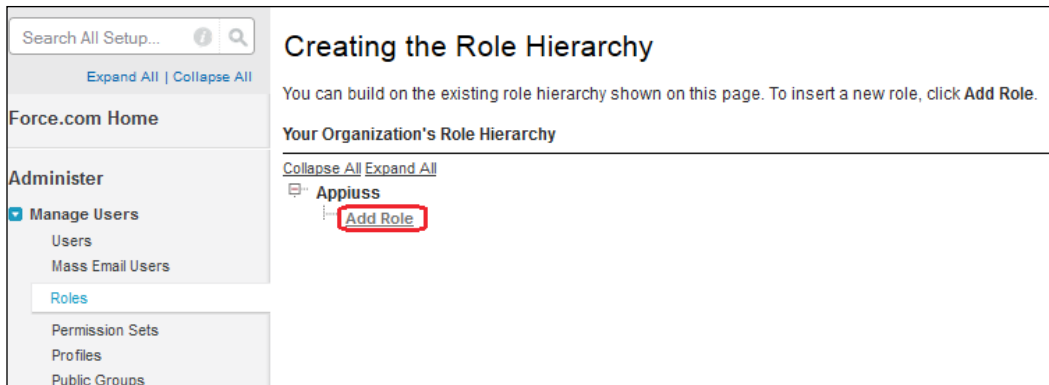
Eastern Sales Rep
NY Sales Rep
MA Sales Rep

International Sales Rep
Asian Sales Rep
European Sales Rep

* View & edit data, roll up forecasts, & generate reports for all users directly below
* Can't access data of users above or at same level

* View & edit data, roll up forecasts, & generate reports only for own data
* Can't access data of users above or at same level

3. Click on **Add Role** to create a new role:



4. It will redirect us to a new page, where we have to enter details in a few fields to create the new role:
 - **Label:** This will be displayed in the user interface
 - **Role Name:** This unique name will be used by the API and packages managed
 - **This role reports to:** This is the role above a specific role in the hierarchy (like in case of VP Sales – the value in this field would be CEO)
 - **Role Name as displayed on reports:** This is the role name that appears on reports
 - **Opportunity Access:** This field describes whether users can access other user's opportunities, which are associated with accounts that the users own

This field is not visible if your organization's sharing model for opportunities is public read/write:

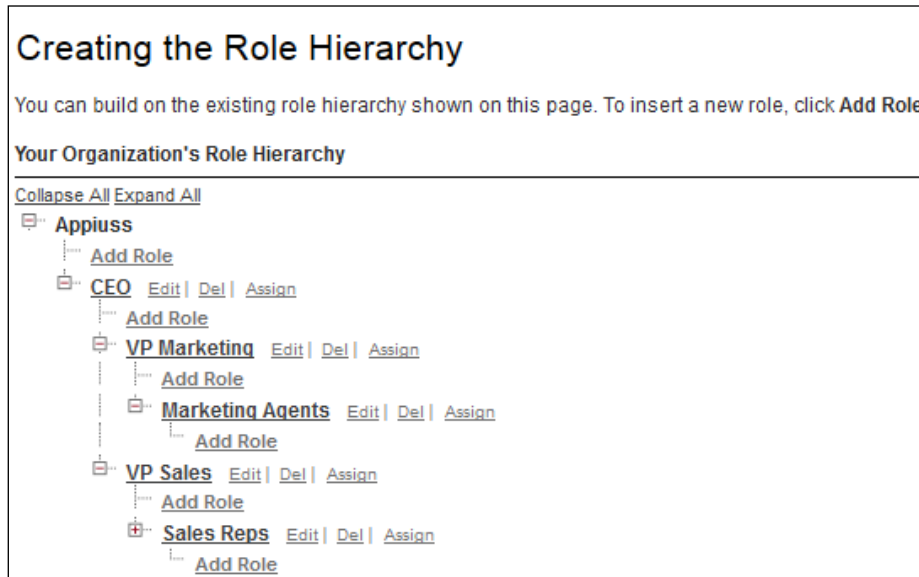
The screenshot shows the 'Role Edit' page for a 'New Role'. The form contains the following fields and options:

- Label:** CEO
- Role Name:** CEO
- This role reports to:** Appiuss
- Role Name as displayed on reports:** CEO
- Opportunity Access:**
 - Users in this role can **view** all opportunities associated with accounts that they own, regardless of who owns the opportunities
 - Users in this role can **edit** all opportunities associated with accounts that they own, regardless of who owns the opportunities

At the bottom of the form are three buttons: 'Save', 'Save & New', and 'Cancel'.

5. Click on **Save**.

Repeat the preceding process and create the organization role hierarchy. You can create the same role hierarchy we used to describe the role hierarchy under the **Role Hierarchy** topic. Finally, it will look like the following screenshot:



Whenever you want to delete any role, make sure that you start the deletion from its child roles. If users do not have any role assigned to their user record, they can only view their own records.

Profiles

Profiles are a way to customize the Salesforce overall experience of a user. Profiles are used to decide the data security in a Salesforce organization by granting object-level permissions and Field-Level Security that decide whether the fields need to be shown to a specific set of users. Profiles have certain rules or settings that we can set in order to grant or restrict a set of user permissions. Roles decide data/record-level access in Salesforce (that is, the records that you can access), and profiles decide what users can see in those records (that is, fields, related lists, and apps).

Let's start with an example. In the roles section, we created a new role for the organization. Sagar Pareek is the system administrator and he wants to maintain data visibility based upon the said role, but in Salesforce, roles can only maintain data/record-level access, so he has to go with the profile feature.

Types of profiles in Salesforce

There are two types of profiles in Salesforce. These are:

- **Standard:** These are profiles that come with your Salesforce organization. You cannot delete them.
- **Custom:** These are profiles that we make by cloning the existing Salesforce standard profiles.



We can delete a Salesforce custom profile only if users are not assigned to that particular profile.

Different types of standard profiles

The following table shows a list of the standard profiles available in Salesforce:

Profile	Description
System administrator	System administrators have full access to Salesforce. They are allowed to configure and customize the application.
Standard Platform User	These users are allowed to use custom apps developed by an organization or installed from AppExchange and the main functionality of the platform.
Standard Platform One App User	Users with this profile can access one custom app developed in your organization or the one installed from AppExchange. The custom app is limited to five tabs. In addition, they can use the core platform functionalities, such as accounts, contacts, reports, dashboards, and custom tabs.
Standard User	Users with this profile are allowed to create and edit most major types of records, run reports, and view the organization's setup. They can view, but not manage, campaigns. They can also create, but not review, solutions. They can edit their personal quota and override forecasts.
Partner User	Users are only allowed to log in from a partner portal.

Profile	Description
Customer Portal User	Users can only log in via a Customer Portal. They can view and edit data that they directly own or data owned by or shared with users below them in the Customer Portal role hierarchy. They can view and edit cases where they are listed in the Contact Name field.
Customer Portal Manager	Users can log in only from a Customer Portal. They can view and edit data that they directly own or data owned by or shared with users below them in the Customer Portal role hierarchy. They can view and edit cases where they are listed in the Contact Name field.
Marketing User	Users can manage campaigns, import leads, create letterheads, create HTML e-mail templates, manage public documents, and update the campaign history via the import wizards. They can also act as a Standard User.
Contract Manager	Users are allowed to create, edit, activate, and approve contracts. This profile can also delete contracts as long as they are not activated. Users can also edit their personal quota and override forecasts.
Chatter Only User	Users are only allowed to log in to Chatter. They are allowed access to all standard Chatter features: people, profiles, groups, and files. Additionally, they can view Salesforce accounts and contacts, use Salesforce CRM Content, Ideas, and Answers, and modify up to ten custom objects.
Chatter Free User	Users are only allowed to log in to Chatter. They can access all standard Chatter features: people, profiles, groups, and files. This is only available with the Chatter Free user license.
Chatter External User	Users are only allowed to log in to Chatter and access groups they've been invited to and interact with members of those groups. This is only available with the Chatter External user license.
Chatter Moderator User	Users are only allowed to log in to Chatter and are able to moderate posts such as edit and delete. They can access all standard Chatter features: people, profiles, groups, and files.

Profile	Description
Site.com Only User	Users can only log in to the Site.com app.
High Volume Customer Portal and Authenticated Website (both user licenses are high-volume portal users)	Users can only log in from a customer portal.
Solution Manager	Users with this profile are allowed to review and publish solutions. They can also act as a Standard User.
Read Only	Users with this profile can view all the records, but cannot edit them.

Creating a custom profile

To create a custom profile, follow these steps:

1. Navigate to **Setup | Administer | Manage Users | Profiles**.
2. Click on **New**.

The screenshot displays the Salesforce 'User Profiles' page. On the left, the 'Administer' sidebar is visible, with 'Profiles' selected and highlighted in a red box. The main content area is titled 'User Profiles' and includes a search bar, 'Expand All | Collapse All' links, and a 'New' button (also highlighted in a red box). Below the button is a table listing various user profiles.

Action	Name	User License
Edit Del	ABC	Salesforce
Edit	Chatter External User	Chatter External
Edit	Chatter Free User	Chatter Free
Edit	Chatter Moderator User	Chatter Free
Edit	Chatter Only User	Chatter Only
Edit	Content Only User	Content Only
Edit	Contract Manager	Salesforce
Edit	Customer Community Login User	Customer Community Login
Edit	Customer Community User	Customer Community

3. Select a standard profile from the list. You can't create custom profiles from scratch, so you have to clone one from a standard profile and enter the name in the **Profile Name** field as you want. A user license will autopopulate in front of the **User License** field.

Search All Setup...

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

[Force.com Home](#)

Administer

- Manage Users**
 - Users
 - Mass Email Users
 - Roles
 - Permission Sets
- [Profiles](#)

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile | Standard User

User License | Salesforce

Profile Name | Demo Profile

[Save](#) [Cancel](#)

4. Click on **Save**.

To distinguish between standard and custom profiles, make sure that the **Custom** checkbox in front of each profile is selected.

User Profiles

[Help for this Page](#)

Below is a list of the profiles for your organization. You can view more detailed information by clicking on the profile link.

[New](#)

Action	Name	User License	Custom
Edit Del	Application Demo	Salesforce	<input checked="" type="checkbox"/>
Edit	Chatter External User	Chatter External	<input type="checkbox"/>
Edit	Chatter Free User	Chatter Free	<input type="checkbox"/>
Edit	Chatter Moderator User	Chatter Free	<input type="checkbox"/>

Settings available under profile

Profile provides the following settings to the users:

- **Console Settings:** This option allows you to define the console settings for the profile
- **Page Layout:** This option allows you to assign page layouts for standard and custom objects

- **Field-Level Security:** This option helps you to define the fields within objects that users can view and edit
- **Custom App Settings:** This option allows you to define the custom apps that can be accessed by users
- **Connected App Access:** This option gives you access related to the connected apps
- **Tab Settings:** This option allows you to define the tabs that users can view
- **Record Type Settings:** This option lets you manage record-type settings for standard and custom objects
- **Administrative and General User Permissions:** This option provides permissions that allow users to manage the system and apps within it
- **Standard and Custom Object Permissions:** This option allows you to manage object permissions that allow users to create, read, edit, and delete records
- **Desktop Integration Clients:** This option defines the desktop client that users can access
- **Login Hours:** These are the hours in which specific profile users can log in to Salesforce
- **Login IP Ranges:** This is the IP range from which the user permits access to Salesforce
- **Enabled Apex Class and Visualforce Pages Access:** This defines the Apex classes and Visualforce pages that users can access

Permission sets

In Salesforce, users have only one profile, but sometimes you're required to assign more than one profile to users based upon business requirements. A permission set is a group of settings and permissions that gives users access to various apps and functions. The settings and permissions in permission sets are similar to those in profiles, but it extends users' functional access without changing their profiles.

Let's start with an example. Sara Bareilles (Profile - TL) is working as a team lead in Appiuss and her manager Rakesh Gupta (Profile - PM) is going on leave for a week, so Sara is responsible for Rakesh Gupta's work. As both of them have different profiles, Sara Bareilles does not have the access that Rakesh Gupta has; in this case, you can use permission sets.

Settings available under permission sets

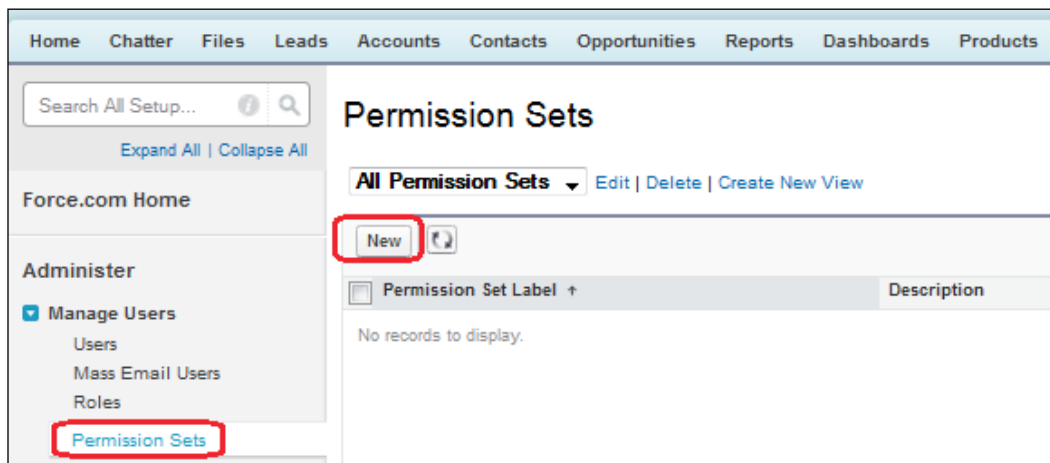
Through permission sets, you can manage access for the following settings:

- **Assigned apps:** This allows you to specify the apps that are visible to users
- **Object settings:** These include the following:
 - Tab settings
 - Record type settings
 - Object permissions
 - Field permissions
- **App permissions:** This helps you to define access for permissions to perform app-specific actions
- **Apex class and Visualforce page access:** This defines the Apex classes and Visualforce pages that users can access
- **System permissions:** This allows you to define permissions to perform actions that apply across apps such as **Modify All Data**
- **Service providers:** This is only available if you've enabled Salesforce as an identity provider

Creating permission sets

To create permission sets, follow these steps:

1. Navigate to **Setup | Administer | Manage Users | Permission Sets**.
2. Click on **New**.



3. A new page will open. To create permission sets, enter data in the **Label**, **API Name**, and **Description** fields, and select **User License** from the drop-down list.

Permission Set
Create

Save Cancel

Enter permission set information

Label Project Manager

API Name Project_Manager

Description Permission Sets for Project Manager

Select the type of users who will use this permission set

Who will use this permission set? If you plan to assign this permission set to multiple users with different licenses, choose "--None--". If only use with them.

User License --None--

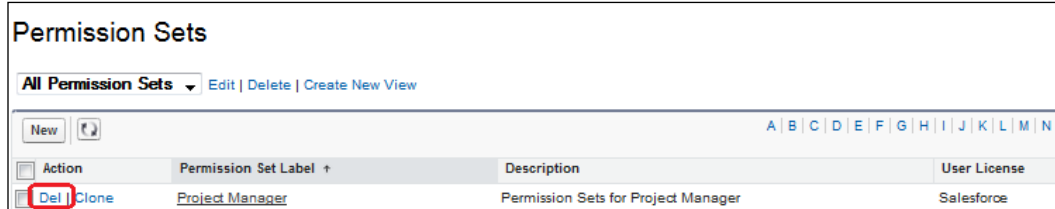
- None--
- Chatter External
- Chatter Only
- Knowledge Only
- Siteforce Only
- Salesforce
- Salesforce Platform
- Customer Portal User
- Customer Portal Manager
- Content Only
- Gold Partner
- Force.com - One App
- Customer Portal Manager Custom
- Customer Portal Manager Standard
- Chatter Free
- High Volume Customer Portal
- Partner Community
- Customer Community Login
- Partner Community Login
- Customer Community

4. Click on **Save**.

Deleting permission sets

To delete permission sets, follow these steps:

1. Navigate to **Setup** | **Administer** | **Manage Users** | **Permission Sets**.
2. Identify the permission sets that you want to delete and click on the **Del** link.



Action	Permission Set Label +	Description	User License
Del Clone	Project Manager	Permission Sets for Project Manager	Salesforce

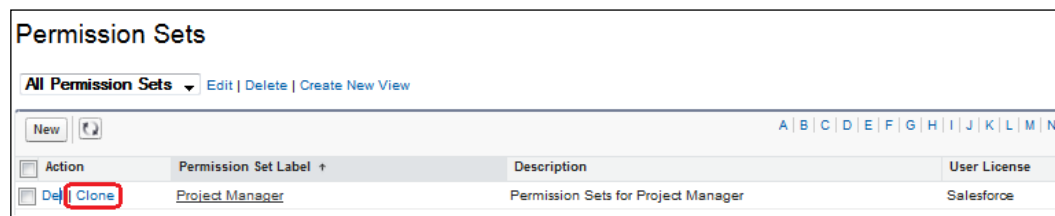
3. You will be asked for confirmation. Click on **OK** if you want to delete it and Salesforce will delete the permission set.

[ Once you delete a permission set, you can't restore it.]

Cloning permission sets

To clone permission sets, follow these steps:

1. Navigate to **Setup** | **Administer** | **Manage Users** | **Permission Sets**.
2. Identify the permission sets that you want to clone.
3. Click on the **Clone** link.



Action	Permission Set Label +	Description	User License
Del Clone	Project Manager	Permission Sets for Project Manager	Salesforce

4. You will be redirected to a new page where you have to enter data in the **Label**, **API Name**, and **Description** fields.

Permission Set
Clone: Project Manager

Enter a new label and description for the cloned permission set.

Save Cancel

Enter permission set information

Label | Delivery Manager

API Name | Delivery_Manager i

Description | Permission Sets for Delivery Manager

User License | Salesforce

Save Cancel


5. Click on **Save**.

Setting up the users

To get more out of Salesforce, we have to allow our business users to access Salesforce. For this, a system administrator has to set up his or her user account. Before setting up a user account, the system administrator needs to gather basic information about users and their preferences to fill out a few mandatory fields. These fields are as follows:

- **Last Name:** This is the user's last name.
- **Alias Name:** Salesforce automatically creates an alias name for you. It is the combination of the first character of your first name and the last four characters of your last name.
- **Email:** This is the e-mail address of the user (it is used by Salesforce to send notifications).
- **Username:** This is in the format of an e-mail address.
- **Nickname:** This is used by Salesforce in the online community.
- **User License:** This is based upon the business requirement. Also, you can select the user license.
- **Profile:** This is dependent on the user license. When you select the user license, it will also give you the option to select corresponding profiles based upon that user license.

- **Email Encoding:** This will define a character set encoding for outbound e-mails sent by the user from Salesforce.
- **Time Zone:** This allows you to specify the user's local time zone.
- **Locale:** This allows you to define the locale for the user.
- **Language:** This lets you define the language in which the user wants to operate in Salesforce.
- **Currency:** This allows you to set the user's preferred currency.

 This **Currency** field will be visible only when multicurrency is enabled in your organization.

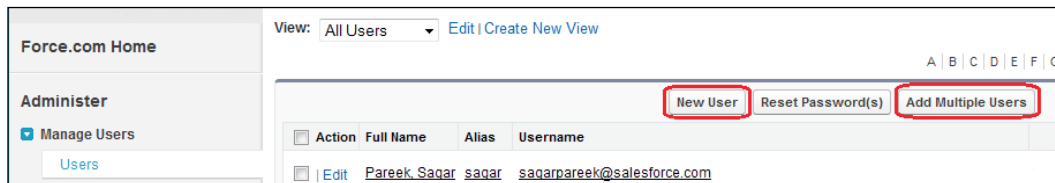
- **Receive Approval Request Emails:** This allows users to select when they want to receive e-mails for approval requests.

There are various ways to set up users in Salesforce. The following are the possible ways through which you can create users:

- User interface
- Data loader
- API call

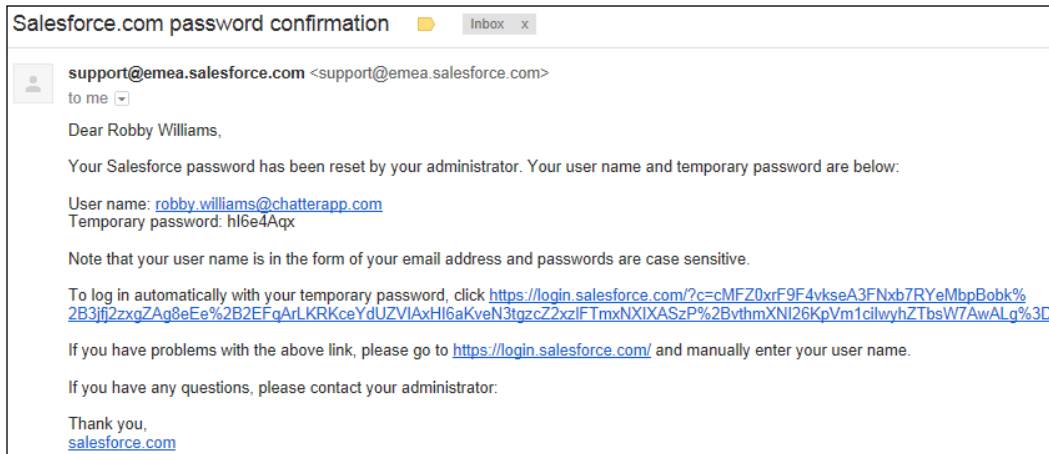
To create a user from the user interface, follow these steps:

1. Navigate to **Setup | Administer | Manage Users | Users**.
2. Click on **New User**.



3. It will open a new page where you have to enter all the required details, and then select **Generate new password** and tick the **Notify the user immediately** checkbox so that Salesforce can send an e-mail notification to the user with the link to activate his or her account and set up a new password.
4. Click on **Save**.

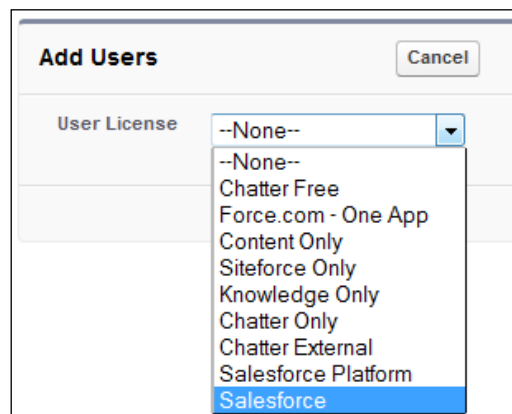
- The user will be notified, as shown in the following screenshot, and can click on the user activation link to activate the account and move on to set the new password:



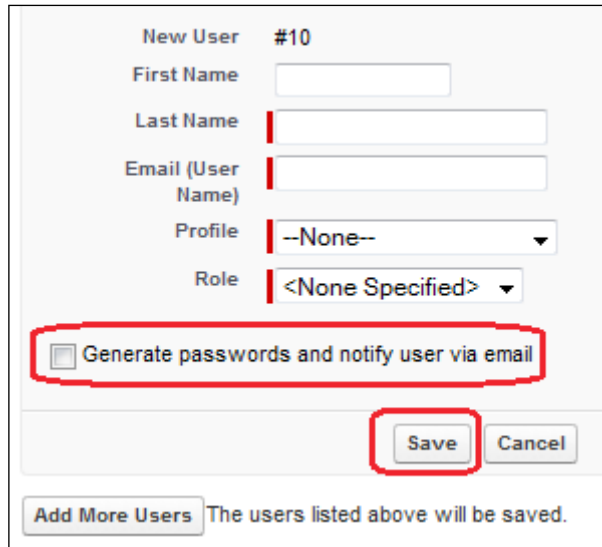
Adding multiple users

Sometimes it may be necessary to create several users, and if you try to create users one by one, it will take a long time. Here, you can use Salesforce's add multiple users feature. You can add up to 10 users at a time. To do this, follow these steps:

- Navigate to **Setup | Administer | Manage Users | Users**.
- Click on **Add Multiple Users**.
- It will redirect you to a new page where you have to select the **User License** type:



- You will have to enter a few details such as the first name, last name, e-mail (user name), profile, and role as shown in the following screenshot:



- Once done, select **Generate passwords and notify user via email**.
- Click on **Save**.
- You can add more users by clicking on the **Add More Users** button.

We will go into more detail about how to set up users through the data loader in *Chapter 7, Concepts of Data Management*.

Locking and unlocking users

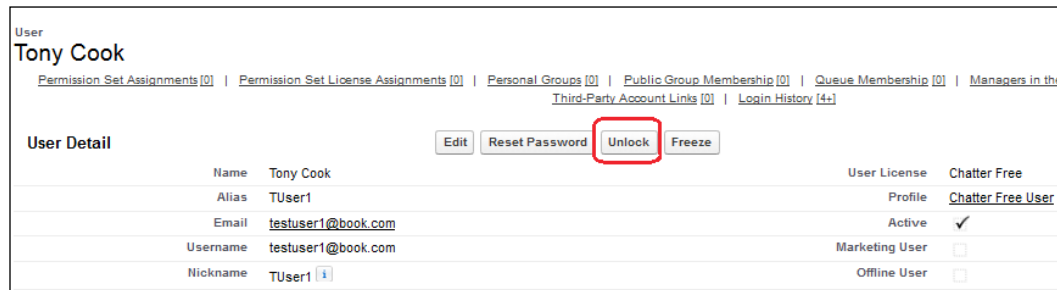
Let's start with an example. Tony Cook is a sales manager at Appiuss. He is trying to log in to Salesforce with his credentials but has forgotten his password and exceeded the maximum invalid login attempts set by his organization's password policies. As a result, his account gets locked. You can go to the user's detail page and in the login history list and check when the password lockout happened under **Status**.

Login History					
Login Time	Source IP	Login Type	Status	Application	Login URL
2/8/2014 4:02:40 PM IST	123.201.43.181	Application	Password Lockout	Browser	login.salesforce.com
2/8/2014 4:02:36 PM IST	123.201.43.181	Application	Invalid Password	Browser	login.salesforce.com
2/8/2014 4:02:34 PM IST	123.201.43.181	Application	Invalid Password	Browser	login.salesforce.com
2/8/2014 4:02:31 PM IST	123.201.43.181	Application	Invalid Password	Browser	login.salesforce.com

Unlocking a user

To unlock a user, follow these steps:

1. Navigate to **Setup | Administer | Manage Users | Users**.
2. Navigate to the **User** page. In this case, **Tony Cook**, and click on the full name to go to the user's detail page:



The screenshot shows the 'User Detail' page for 'Tony Cook'. At the top, there are navigation links: [Permission Set Assignments \[0\]](#), [Permission Set License Assignments \[0\]](#), [Personal Groups \[0\]](#), [Public Group Membership \[0\]](#), [Queue Membership \[0\]](#), [Managers in the](#), [Third-Party Account Links \[0\]](#), and [Login History \[4+\]](#). Below these links are four buttons: 'Edit', 'Reset Password', 'Unlock', and 'Freeze'. The 'Unlock' button is highlighted with a red box. Below the buttons is a table with user details:

User Detail		User License	Chatter Free
Name	Tony Cook		
Alias	TUser1	Profile	Chatter Free User
Email	testuser1@book.com	Active	<input checked="" type="checkbox"/>
Username	testuser1@book.com	Marketing User	<input type="checkbox"/>
Nickname	TUser1	Offline User	<input type="checkbox"/>

3. Click on **Unlock** to unlock the user as shown in the preceding screenshot.
4. Now reset the password to send a new password to the user and Salesforce will send an e-mail notification to the user's e-mail address.

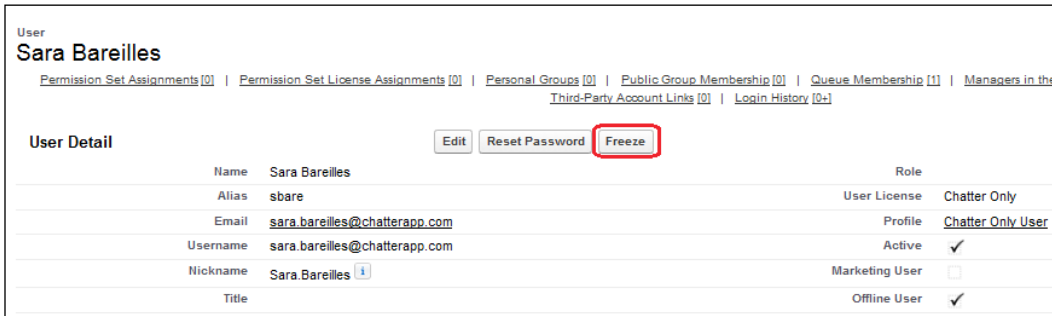
You can do this from both the Salesforce UI and SalesforceA mobile app.

Freezing a user's account


In the Winter '14 release, Salesforce launched a new feature called Freeze user's account. Let's start with an example. In this case, Sara Bareilles is working as a sales manager in Appiuss. She is referenced in many workflows and approval process e-mail notifications. Today is her last day at Appiuss, so as per the company policy, the system administrator has to deactivate her user account after business hours. However, as she is referenced in many places, it will take time to deactivate her user account. First, the system administrator has to remove her user reference from everywhere. In this case, it's better to freeze her user account so that she can't access her account anymore.

To freeze a user's account, follow these steps:


1. Navigate to **Setup | Administer | Manage Users | Users**.
2. Navigate to the user. In this case, **Sara Bareilles**, and click on the full name to go to the user's detail page:



The screenshot shows the user detail page for Sara Bareilles. At the top, there are navigation links: [Permission Set Assignments \[0\]](#), [Permission Set License Assignments \[0\]](#), [Personal Groups \[0\]](#), [Public Group Membership \[0\]](#), [Queue Membership \[1\]](#), [Managers in the Queue \[0\]](#), [Third-Party Account Links \[0\]](#), and [Login History \[0+\]](#). Below these links is the 'User Detail' section with three buttons: 'Edit', 'Reset Password', and 'Freeze'. The 'Freeze' button is highlighted with a red box. The user details are as follows:

User Detail		Role	
Name	Sara Bareilles	User License	Chatter Only
Alias	sbare	Profile	Chatter Only User
Email	sara.bareilles@chatterapp.com	Active	<input checked="" type="checkbox"/>
Username	sara.bareilles@chatterapp.com	Marketing User	<input type="checkbox"/>
Nickname	Sara Bareilles 	Offline User	<input checked="" type="checkbox"/>
Title			

3. Click on the **Freeze** button to freeze the user account.
4. After freezing the user account, the user will not be able to access Salesforce, including resetting his or her password by using the **Forgot Password** feature.

 Freezing user accounts doesn't make a user's licenses available for use in your organization. You must deactivate user accounts to make a user's licenses available.

Benefits of the login history

By using the login history feature, system administrators can track the user login information for the last 20 logins. The login history shows the following information:

- **Login time**
- **Source IP**
- **Login Type**
- **Status** (for example, success, failed, invalid password, and user is frozen)
- **Browse Application**

- **Login URLs** (for example, <http://login.salesforce.com>, <http://help.salesforce.com>, <http://success.salesforce.com>, and <http://developer.salesforce.com>)

Login History						Login History Help ?
Login Time	Source IP	Login Type	Status	Application	Login URL	
2/8/2014 4:37:05 PM IST	14.98.56.47	Application	User is Frozen	Browser	login.salesforce.com	
2/8/2014 4:36:31 PM IST	14.98.56.47	Application	Success	Browser	login.salesforce.com	
2/8/2014 4:35:51 PM IST	14.98.56.47	Application	User is Frozen	Browser	login.salesforce.com	
2/8/2014 4:35:06 PM IST	14.98.56.47	Application	User is Frozen	Browser	login.salesforce.com	
2/8/2014 4:34:55 PM IST	14.98.56.47	Application	User is Frozen	Browser	login.salesforce.com	
2/8/2014 4:34:26 PM IST	123.201.43.181	Application	User is Frozen	Browser	login.salesforce.com	
2/8/2014 4:34:12 PM IST	123.201.43.181	Application	User is Frozen	Browser	login.salesforce.com	
2/8/2014 4:03:03 PM IST	14.98.56.47	Application	Success	Browser	api.salesforce.com	
2/8/2014 4:02:42 PM IST	14.98.56.47	Application	Failed: Computer activation required	Browser	login.salesforce.com	
2/8/2014 4:02:06 PM IST	14.98.56.47	Application	Invalid Password	Browser	login.salesforce.com	

Download login history for last six months, including logins from outside the website, such as API logins (Excel csv file) »

If you want to download the last six months of the login history, you can download it as shown in the preceding screenshot. You can use the login history for use cases such as a user notifying the system administrator that they cannot log in to Salesforce. The best practice in this case is to go to the user detail page and investigate the issue via the login history.



If the username entered by the user is incorrect, then the issue will not come under the login history.

Groups and their uses

Groups are a set of users. In a group, you can add individual users, other groups, users in a particular group or territory, roles, and subordinates. There are two types of groups in Salesforce:

- **Public group:** A system administrator is able to create public groups
- **Private group:** Individual users can create groups for their own personal use

Creating a public group

To create a public group, follow these steps:

1. Navigate to **Setup | Administer | Manage Users | Public Groups**.
2. Click on the **New** button.
3. Fill the details in the **Label** and **Group Name** fields, and select the **Grant access using hierarchies** checkbox if you want to give this group's access to a user who is on top in the hierarchy.

4. From the **Search** drop-down list, you can select the **Users**, **Public Group**, **Role**, and finally **Role and Subordinates** options:

Group Membership
New Group

Group Information Save Cancel

New Public Group

Label

Group Name i

Grant Access Using Hierarchies i

Search: for: Find

Available Members Selected Members

User: Appiuss Site Guest User
User: Jai Pareek
User: Rakesh Gupta
User: Robby Williams
User: Sagar Pareek
User: Sara Bareilles
User: User6 Test

--None--

Add
Remove

5. Click on **Save**.

Creating a personal group

To create a personal group, follow these steps:

1. Select the **Name** tab and click on **My Settings**.
2. From the left-hand side pane, select the **Personal** tab and click on **My Groups**.
3. Click on **New Group**.
4. Fill the information like we did for the public group in the last topic.
5. Click on **Save**.

We can use groups in the following ways:

- To use public groups in sharing rule to share records
- To share your records with other users
- To specify that you want to synchronize contacts owned by others users
- To add multiple users to a Salesforce CRM content library
- To assign users to specific actions in Salesforce Knowledge

Queues and their significance

In Salesforce, the record's owner will be a user or a queue for lead, case, service contract, and custom objects. Once the records are placed in a queue manually or through an automatic case or lead assignment rule, they remain there until they are assigned to a user or taken by one of the queue members. Any queue member or users above the records in the role hierarchy can take ownership of them in a queue. All the users in a queue have the same access to a record.

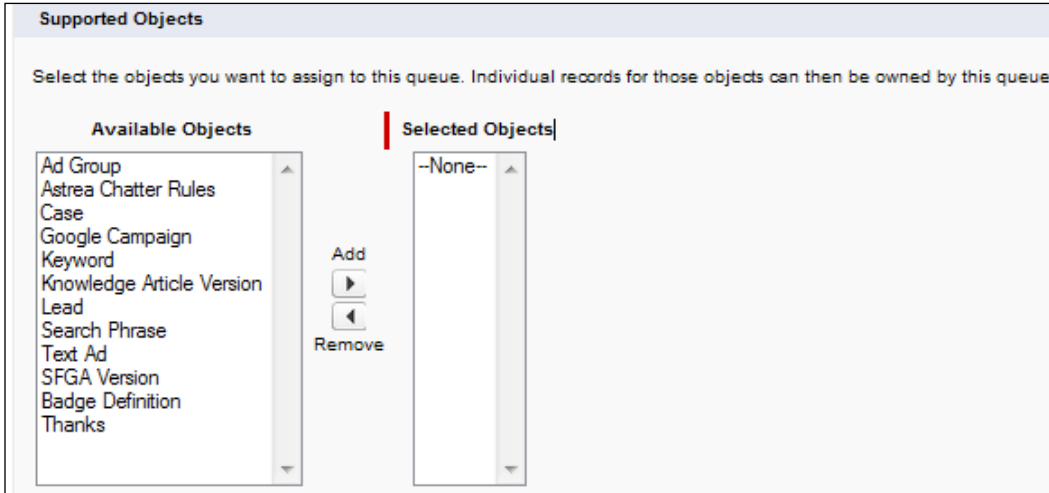
Let's start with an example where an organization is using Web-to-Lead to capture leads from their website. Now the organization wants to assign the lead of a particular region to the local marketing reps, so in this case, you can use a queue.

Creating a queue

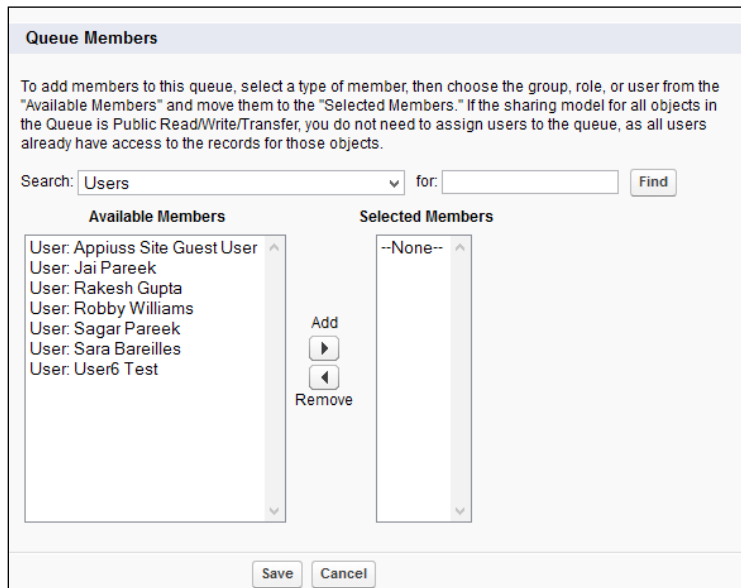
To create a queue, follow these steps:

1. Navigate to **Setup | Administer | Manage Users | Queues**.
2. Click on **New**.
3. Enter the necessary details in the **Label, Queue Name, and Queue email address** fields and then select **Send Email to Members**.

4. Select the object from the **Available Objects** pane that you want to create a queue for.



5. Select the queue members from the **Search** dropdown. You can select the **User**, **Public Group**, **Role**, and **Role and Subordinates** options.



6. Click on **Save**.

Add an e-mail address to the **Queue Email** field and Salesforce triggers an e-mail notification when new records are placed in the queue. You can use an individual user's e-mail address or a distribution list.

Leave the **Queue Email** field blank and Salesforce will send notification e-mails to all the queue members individually when new records are placed in the queue.

If we enter an e-mail address into the **Queue Email** field and check **Send Email to Members**, Salesforce will send an e-mail notification to all the queue members and the addresses in **Queue Email** individually when new records are placed in the queue.

Personal setup

Personal setup allows users to review their personal information registered with Salesforce. Here, a user is allowed certain facilities. They are explained in the following sections.

Editing personal information

You can edit the existing personal information registered with Salesforce, such as **First Name**, **Last Name**, **Manager**, **Email address**, and **Work information**. If you change your e-mail address, a confirmation message will be sent to the new address. You must click on the link provided in that message for the new e-mail address to be confirmed. This process ensures system security.

To do this, follow these steps:

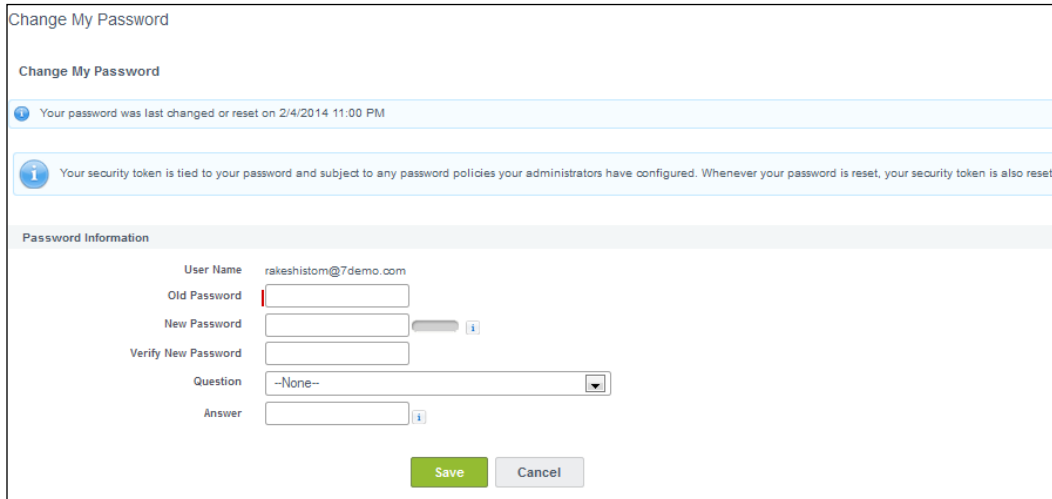
1. Select the **Name** tab and click on **My Settings**.
2. From the left-hand side pane, select the **Personal** tab and click on **Personal Information**.
3. Edit and update your personal information.
4. Once done, click on **Save**.

Changing the password

To change your password, simply follow these steps:

1. Select the **Name** tab and click on **My Settings**.
2. From the left-hand side pane, select the **Personal** tab and click on **Change My Password**.

3. Enter your old password, then simply enter your new password and select the security question and answer.
4. Click on **Save**.



Change My Password

Change My Password

Your password was last changed or reset on 2/4/2014 11:00 PM

Your security token is tied to your password and subject to any password policies your administrators have configured. Whenever your password is reset, your security token is also reset.

Password Information

User Name rakeshistom@7demo.com

Old Password

New Password

Verify New Password

Question --None--

Answer

Save Cancel

You will get a new security token via e-mail.

Resetting the security token

If you forget the security token or wish to generate a new one, follow these steps:

1. Select the **Name** tab and click on **My Settings**.
2. From the left-hand side pane, select the **Personal** tab and click on **Reset My Security Token**.
3. Salesforce will send an e-mail notification to you with a new security token.

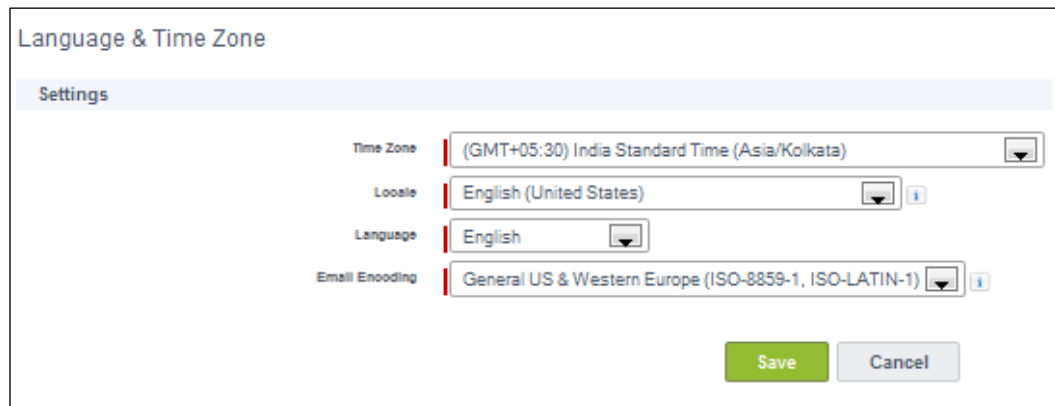


A user needs a security token when they are trying to access Salesforce from API tools, such as data loader and IDE.

Language and time zone setup

If you want to change your language and time zone settings, follow these steps:

1. Select the **Name** tab and click on **My Settings**.
2. From the left-hand side pane, select the **Personal** tab and click on **Language & Time Zone**.
3. When you're done, click on **Save**.



Language & Time Zone

Settings

Time Zone | (GMT+05:30) India Standard Time (Asia/Kolkata)

Locale | English (United States)

Language | English

Email Encoding | General US & Western Europe (ISO-8859-1, ISO-LATIN-1)

Save Cancel

Grant account login access

By using this feature, users may grant login access to system administrators or support personnel. This is required when system administrators assist with support issues and want to check potential issues with a user's login.

To grant login access, follow these steps:

1. Select the **Name** tab and click on **My Settings**.
2. From the left-hand side pane, select the **Personal** tab and click on **Grant Account Login Access**.
3. Select the duration for **Salesforce.com Support**.

4. Click on **Save**.

Grant Account Login Access

To assist with support issues, you may grant your administrator or support personnel the ability to login as you and access your data.

My Username: rakeshistom@7demo.com

Grant Access To	Access Duration
Your Company's Administrator	190 day(s) left. Expires on 8/17/2014. Change
Salesforce.com Support	3 Days (exp. 2/10/2014) ▼
salesforce.com Support ⓘ	1 Week (exp. 2/14/2014) ▼

When the **Access Duration** is over, Salesforce automatically removes the login access from Salesforce.com support.

Checking connections

When you log in for the first time through connected apps, Salesforce will ask you to enter a verification code. After that, Salesforce will save that IP address so that the next time when you log in from the same IP address, Salesforce won't ask you to enter any verification code.

To check your connections, simply follow these steps:

1. Select the **Name** tab and click on **My Settings**.
2. Select the **Personal** tab and click on **Connections**.
3. To revoke access, simply click on the **Revoke** link.

OAuth Connected Apps				
Action	Created Date	Last Used	Application	Use Count
Revoke	2/8/2014 5:57:56 PM IST	2/8/2014 5:58:03 PM IST	Salesforce Help & Training	1
Revoke	2/8/2014 5:38:52 PM IST	2/8/2014 5:38:55 PM IST	Salesforce Help & Training	1
Revoke	2/8/2014 4:46:57 PM IST	2/8/2014 4:47:02 PM IST	Salesforce Help & Training	1
Revoke	2/6/2014 10:59:32 PM IST	2/6/2014 10:59:37 PM IST	Salesforce Help & Training	1
Revoke	2/6/2014 12:11:06 AM IST	2/6/2014 12:11:08 AM IST	Community	1

The following aspects are covered in this section:

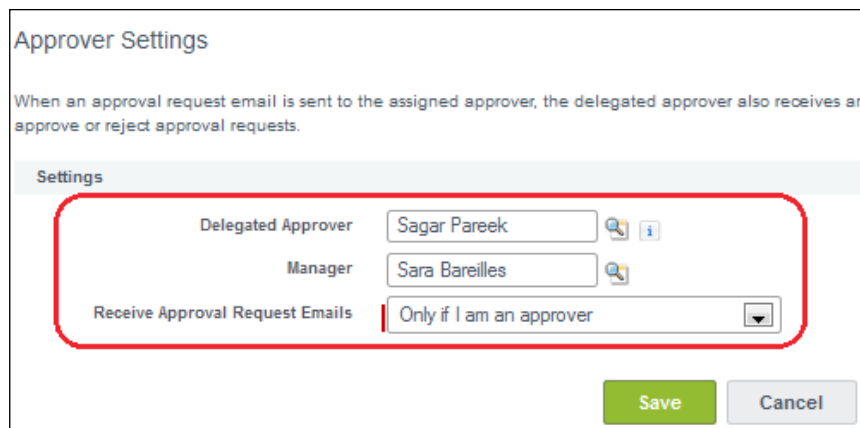
- **OAuth connected apps:** This section shows us the apps that we've authorized to log in. Here, the information shown is **Connection Created Date, Last Used, Application, Use Count, and Actions**. If we want to revoke the access for any of the connections, we can click on the **Revoke** link before the connection.
- **Third-party account links:** This section shows the third-party accounts you are allowed access to in order to log in.

Approver settings

Approver settings can be used to opt out of receiving e-mail notifications for approval or to delegate an approver on our behalf.

To configure the approver settings, follow these steps:

1. Select the **Name** tab and click on **My Settings**.
2. Select the **Personal** tab and click on **Approver Settings**.
3. Select your **Delegated Approver** (except a group or queue).
4. Select your **Manager**.
5. Select any of the options from the drop-down list next to **Receive Approval Request Emails**, as shown in the following screenshot:



Approver Settings

When an approval request email is sent to the assigned approver, the delegated approver also receives an approve or reject approval requests.

Settings

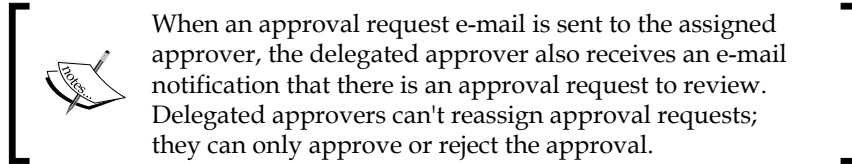
Delegated Approver: Sagar Pareek

Manager: Sara Bareilles

Receive Approval Request Emails: Only if I am an approver

Save Cancel

6. We can set any of the following options regarding e-mail notifications:
 - **If I am an approver or delegated approver**
 - **Only if I am an approver**
 - **Only if I am a delegated approver**
 - **Never**



7. Click on **Save**.

Summary

In this chapter, we learned about customization guidelines in order to set up our organization's role hierarchy in Salesforce. We discussed profiles in order to restrict user access to certain features available in Salesforce and for data availability. We then went into detail about how user management can be done in Salesforce, and how an individual user can access his or her information. Finally, we discussed the significance of public groups and queues, and how record ownership can be managed in Salesforce.

In the next chapter, we will go through the various concepts related to different security modules available in Salesforce.

3

Making Your Salesforce Data Secure – Security Settings in Salesforce

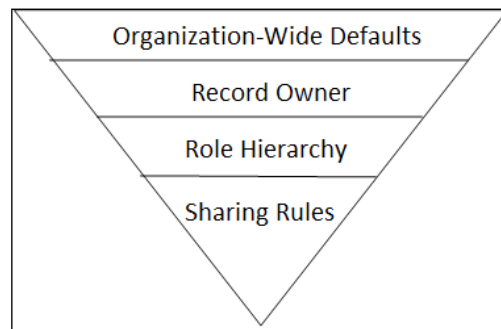
In the previous chapter, we discussed the company's profile management, role, and profile permission sets. We also discussed the user management personal settings in Salesforce. In this chapter, we will discuss **Organization-Wide Default (OWD)** and various ways to share records. We will also discuss the various security settings in Salesforce. The following topics will be covered in this chapter:

- Concepts of OWD
- The sharing rule
- Field-Level Security and its effect on data visibility
- Setting up password policies
- Two-factor authentication in Salesforce
- Session setting and its effects on users
- Network access - securing your organization data
- Removing activated IP - activations
- Setting up login access policies
- Single sign-on settings
- Authentication providers
- View Setup Audit Trail
- Expire all passwords

- Concepts of delegated administration
- Remote site settings
- HTML documents and attachments settings
- Portal health check

Concepts of OWD

Organization-Wide Default is also known as OWD. This is the base-level sharing and setting of objects in your organization. By using this, you can secure your data so that other users can't access data that they don't have access to. The following diagram shows the basic database security in Salesforce. In this, OWD plays a key role.



It's a base-level object setting in the organization, and you can't go below this. So here, we will discuss OWD in Salesforce.

Let's start with an example. Sagar Pareek is the system administrator in Appiuss. His manager Sara Barellies told him that the user who has created or owns the account records as well as the users that are higher in the role hierarchy can access the records.

Here, you have to think first about OWD because it is the basic thing to restrict object-level access in Salesforce. To achieve this, Sagar Pareek has to set Organization-Wide Default for the account object to private.

Setting up OWD

To change or update OWD for your organization, follow these steps:

1. Navigate to **Setup | Administer | Security Controls | Sharing Settings**.
2. From the **Manage sharing settings for** drop-down menu, select the object for which you want to change OWD.

The screenshot shows the Salesforce Sharing Settings interface. On the left is a navigation menu with 'Sharing Settings' selected. The main area displays 'Organization-Wide Defaults' with a table of objects and their default access levels. The 'Edit' button is circled in red, and the 'Grant Access Using Hierarchies' column is also circled in red, showing checkmarks for Lead, Account, Contract and Asset, and Opportunity.

Object	Default Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	✓
Account, Contract and Asset	Public Read/Write	✓
Contact	Controlled by Parent	✓
Opportunity	Public Read Only	✓

3. Click on **Edit**.
4. From the **Default Access** drop-down menu, select an access as per your business needs.
5. For the preceding scenario, select **Private** to grant access to users who are at a high position in the role hierarchy, by selecting **Grant access using hierarchy**. For standard objects, it is automatically selected, and for custom objects, you have the option to select it.
6. Click on **Save**.

The following table describes the various types of OWD access and their respective description:

OWD access	Description
Private	Only the owner of the records and the higher users in the role hierarchy are able to access and report on the records.
Public read only	All users can view the records, but only the owners and the users higher in the role hierarchy can edit them.
Public read/write	All users can view, edit, and report on all records.
Public read/write/transfer	All users can view, edit, transfer, and report on all records. This is only available for case and lead objects.
Controlled by parent	This says that access on the child object's records is controlled by the parent.
Public full access	This is available for campaigns. In this, all users can view, edit, transfer, and report on all records.

You can assign this access to campaigns, accounts, cases, contacts, contracts, leads, opportunities, users, and custom objects. This feature is only available for Professional, Enterprise, Unlimited, Performance, Developer, and Database Editions.

Basic OWD settings for objects

Whenever you buy your Salesforce Instance, it comes with the predefined OWD settings for standard objects. You can change them anytime by following the path **Setup | Administer | Security Controls | Sharing Settings**. The following table describes the default access to objects:

Object	Default access
Account	Public read/write
Activity	Private
Asset	Public read/write
Campaign	Public full access
Case	Public read/write transfer
Contact	Controlled by parent (that is, account)
Contract	Public read/write
Custom Object	Public read/write
Lead	Public read/write transfer
Opportunity	Public read only
Users	Public read only and private for external users

We will discuss more about the objects mentioned in the preceding table in *Chapter 5, CRM Functions and Streamlining Business Requirements*.

Let's continue with another example. Sagar Pareek is the system administrator in Appiuss. His manager Sara Barellies told him that only the users who created the record for the demo object can access the records, and no one else can have the power to view/edit/delete it.

To do this, you have to change OWD for a demo object to private, and don't select **Grant Access Using Hierarchy**.



When you select the **Grant Access Using Hierarchy** field, it provides access to people who are above in the role hierarchy.

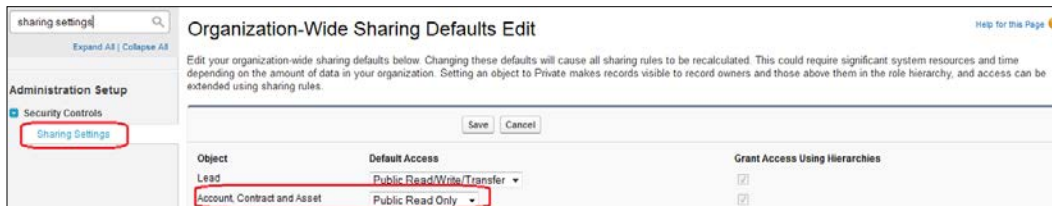
Sharing Rule

To open the record-level access for a group of users, roles, or roles and subordinates beyond OWD, you can use Sharing Rule. Sharing Rule is used for open access; you can't use Sharing Rule to restrict access.

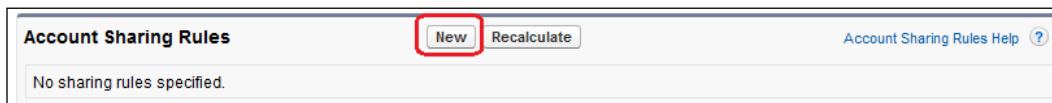
Let's start with an example where Sagar Pareek is the system administrator in Appiuss. His manager Sara Barellies wants every user in the organization to be able to view the account records but only a group of users (all the users do not belong to the same role or have the same profile) can edit it.

To solve the preceding business requirement, you have to follow these steps:

1. First, change the OWD account to **Public Read Only** by following the path **Setup | Administer | Security Controls | Sharing Settings**, so all users from the organization can view the account records.



2. Now, create a public group `Account access` and add users as per the business requirement. To create a public group, follow the path **Name | Setup | Administration Setup | Manage Users | Public Groups**.
3. Finally, you have to create a sharing rule. To create sharing rules, follow the path **Setup | Administer | Security Controls | Sharing Settings**, and navigate to the list related to **Account Sharing Rules**:



4. Click on **New**, and it will redirect you to a new window where you have to enter **Label**, **Rule Name**, and **Description** (always write a description so that other administrators or developers get to know why this rule was created).
5. Then, for **Rule Type**, select **Based on criteria**.
6. Select the criteria by which records are to be shared and create a criterion so that all records fall under it (such as **Account Name not equal to null**).
7. Select **Public Groups** in the **Share with** option and your group name.

8. Select the level of access for the users. Here, select **Read/Write** from the drop-down menu of **Default Account, Contract and Asset Access**. Finally, it will look like the following screenshot:

The screenshot shows the 'Setup Account Sharing Rule' interface. It is divided into five steps:

- Step 1: Rule Name**: Label is 'Account access', Rule Name is 'Account_access', and Description is 'This sharing rule will open access for a group of user.'
- Step 2: Select your rule type**: 'Based on criteria' is selected.
- Step 3: Select which records to be shared**: A table with columns 'Criteria', 'Field', 'Operator', and 'Value'. The first row has 'Account Name', 'not equal to', and 'null'. There are four empty rows below it.
- Step 4: Select the users to share with**: 'Share with' is set to 'Public Groups' and 'Account access'.
- Step 5: Select the level of access for the users**: 'Default Account, Contract and Asset Access' is 'Read/Write', 'Opportunity Access' is 'Private', and 'Case Access' is 'Private'.

Buttons for 'Save' and 'Cancel' are at the bottom.

Types of Sharing Rules

What we did to solve the preceding business requirement is called Sharing Rule. There is a limitation on Sharing Rules; you can write only 50 Sharing Rules (criteria-based) and 300 Sharing Rules (both owner- and criteria-based) per object. The following are the types of Sharing Rules in Salesforce:

- **Manual Sharing**: Only when OWD is set to **Private** or **Public Read** for any object will a sharing button be enabled in the record detail page. Record owners or users, who are at a higher position in role and hierarchy, can share records with other users. For the last business use case, we changed the account OWD to **Public Read Only**. If you navigate to the **Account records** detail page, you can see the **Sharing** button:

< Back to List: Accounts

[Contacts \[1\]](#) |
 [Open Activities \[1\]](#) |
 [Activity History \[0\]](#) |
 [Opportunity \[2\]](#) |
 [Cases \[0\]](#) |
 [Partners \[0\]](#) |
 [Google Docs, Notes, & Attachments \[0\]](#)
[Approval History \[0\]](#) |
 [Account Team \[0\]](#)

Account Detail

Account Owner	Sagar Pareek [Change]	Phone
Account Name	Packt Publishing [View Hierarchy]	Fax
Parent Account		Contractor <input type="checkbox"/>
Rating	10	Website http://www.packtpub.com
Location Define		Account Source

Click on the **Sharing** button and it will redirect you to a new window. Now, click on **Add** and you are ready to share records with the following:

- Public groups
- Users
- Roles
- Roles and subordinates

Select the access type for each object and click on **Save**. It will look like what is shown in the following screenshot:

Global Media
New Sharing

Account: Specify the sharing for this record. You can share this record and its related data with
Individual sharing can only be used to grant wider access to data, not to restrict access.

New Sharing

Sharing Information

Search: Public Groups for:

Available	Share With
All Internal Users	Group: Account access

Account Access
 Opportunity Access
 Case Access

The **Lead** and **Case Sharing** buttons will be enabled when OWD is **Private**, **Public Read Only**, and **Public Read/Write**.

- **Apex Sharing:** When all other Sharing Rules can't fulfill your requirements, then you can use the Apex Sharing method to share records. It gives you the flexibility to handle complex sharing.

Apex-managed sharing is a type of programmatic sharing that allows you to define a custom sharing reason to associate with your programmatic share. Standard Salesforce objects support programmatic sharing while custom objects support Apex-managed sharing.

Field-Level Security and its effect on data visibility

Data on fields is very important for any organization. They want to show some data to the field-specific users. In Salesforce, you can use Field-Level Security to make fields hidden or read-only for a specific profile. There are three ways in Salesforce to set Field-Level Security:

- From an object-field
- From a profile
- Field accessibility

From an object-field

Let's start with an example where Sagar Pareek is the system administrator in Appiuss. His manager Sara Barellies wants to create a field (phone) on an account object and make this field read-only for all users and also allowing system administrators to edit the field.

To solve this business requirement, follow these steps:

1. Navigate to **Setup | Customize | Account | Fields** and then click on the **Phone** (it's a hyperlink) field.
2. It will redirect you to the detail page of the **Phone** field; you will see a page like the following screenshot:

Account Field
Phone
Back to Account Fields

Edit Set Field-Level Security View Field Accessibility

Field Information

Field Label	Phone	Field Name	Phone
Data Type	Phone		
Help Text			

Validation Rules New

No validation rules defined.

- Click on the **Set Field-Level Security** button, and it will redirect you to a new page where you can set the Field-Level Security.

Edit Event Registration Custom Field
Phone

Step 3. Establish field-level security Step 3 of 3

Previous Save Cancel

Field Label	Phone	Field Name	Phone
Data Type	Phone	Description	

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	<input checked="" type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Application Demo	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Chatter Only User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Content Only User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Siteforce Only User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Select **Visible** and **Read-Only** for all the profiles other than that of the system administrator. For the system administrator, select only **Visible**.
- Click on **Save**.



If you select **Read-Only**, the visible checkbox will automatically get selected.

From a profile

Similarly, in Field-Level settings, you can also achieve the same results from a profile. Let's follow the preceding business use case to be achieved through the profile. To do this, follow these steps:

1. Navigate to **Setup | Administer | Manage Users | Profile**, go to the **System Administrator** profile, and click on it. Now, you are on the profile detail page.
2. Navigate to the **Field-Level Security** section. It will look like the following screenshot:

Field-Level Security	
Standard Field-Level Security	
Account [View]	Lead [View]
Asset [View]	Opportunity [View]
Badge Definition [View]	Opportunity Product [View]
Campaign [View]	Price Book [View]
Campaign Member [View]	Product [View]
Case [View]	Solution [View]
Contact [View]	Task [View]
Contract [View]	Thanks [View]
Event [View]	User [View]
Idea [View]	
Custom Field-Level Security	
Ad Group [View]	Search Phrase [View]
Astrea Chatter Rules [View]	SFGA Version [View]
Google Campaign [View]	Text Ad [View]
Keyword [View]	

3. Click on the **View** link beside the **Account** option. It will open **Account Field-Level Security** for the profile page.
4. Click on the **Edit** button and edit **Field-Level Security** as we did in the previous section.

Field accessibility

We can achieve the same outcome by using field accessibility. To do this, follow these steps:

1. Navigate to **Setup | Administer | Security Controls | Field Accessibility**.
2. Click on the object name; in our case, it's **Account**.
3. It will redirect you to a new page where you can select **View by Fields** or **View by Profiles**:

Field Accessibility

Account

This page allows you to view Account field accessibility for the following profiles.

[Choose a different tab](#)

Choose your view

[View by Fields](#)

Use this option to choose a field and view a table of field accessibility for different profiles and record types.

[View by Profiles](#)

Use this option to choose a profile and view a table of field accessibility for different record types.

- In our case, select **View by Fields** and then select the field **Phone**.
- Click on the editable link as shown in the following screenshot:

Field accessibility for Field: Phone

Click on a cell in the table below to change the field's accessibility.

Profiles	Field Access
Application Demo	Editable
Chatter Only User	Editable
Contract Manager	Editable
Customer Community Login User	Hidden
Customer Community User	Hidden
Customer Portal Manager	Hidden
Customer Portal Manager Custom	Hidden
Customer Portal Manager Standard	Hidden
Customer Portal User	Hidden
Demo Profile	Editable
Force.com - One App User	Editable
Gold Partner User	Editable
High Volume Customer Portal User	Hidden
Marketing User	Editable
Partner Community Login User	Editable
Partner Community User	Editable
Read Only	Editable
Solution Manager	Editable
Standard Platform User	Editable
Standard User	Editable
System Administrator	Editable
Profiles	Field Access

6. It will open the **Access Settings for Account Field** page, where you can edit the Field-Level Security. Once done, click on **Save**.

Setting up password policies

For security purposes, Salesforce provides an option to set password policies for the organization. Let's start with an example. Sagar Pareek, the system administrator of an organization, has decided to create a policy regarding the password for the organization, where the password of each user must be of 10 characters and must be a combination of alphanumeric and special characters. To do this, he will have to follow these steps:

1. Navigate to **Setup | Security Controls | Password Policies**. It will open the **Password Policies** setup page:



2. In the **Minimum password length** field, select **10 characters**.
3. In the **Password complexity requirement** field, select **Must mix Alpha, numeric and special characters**.

- Here, you can also decide when the password should expire under the **User password expire in** option. Enforce the password history under the option **enforce password history**, and set a password question requirement as well as the number of invalid attempts allowed and the lock-out period.

Password Policies	
User passwords expire in	90 days ▼
Enforce password history	3 passwords remembered ▼
Minimum password length	10 characters ▼
Password complexity requirement	Must mix alpha, numeric, and special characters ▼
Password question requirement	Cannot contain password ▼
Maximum invalid login attempts	10 ▼
Lockout effective period	15 minutes ▼

- Click on **Save**.

Two-factor authentication in Salesforce

Two-factor authentication in Salesforce is a two-step login process. You can enable it if your users need more security rather than the ordinary login process. In this process, once the user logs in using their username and password, a token or passcode is sent to their device, which they need to enter in order to finally log in.

Time-based tokens can now be used as a substitute to SMS-based (not available for non-English organizations) and e-mail-based login verification to activate a computer:

1. Download the supported Authenticator app for your mobile devices.
2. Create one permission set with the name **Two Factor Authentication**. To do this, navigate to **Name | Setup | Manage Users | Permission sets | New** and enter the data as shown in the following screenshot:

Permission Set
Create

Save Cancel

Enter permission set information

Label Two Factor Authentication

API Name Two_Factor_Authentication

Description

Select the type of users who will use this permission set

Who will use this permission set? If you plan to assign this permission set to multiple users with different licenses, choose '-None-'. If only with them.

User License Salesforce

Save Cancel

3. Add the **Two-Factor Authentication for User Interface Logins** system permission in the newly-created permission sets.

Two-Factor Authentication for User Interface Logins Require users to enter a time-based token during login.

4. Now, navigate to the user's record for which you want to enable **Two Factor Authentication**.

5. Add this permission set to the user's record by clicking on the **Edit Assignments** button in the list related to **Permission Sets Assignments** on the user's record.

Permission Set Assignments
Rakesh Gupta

Save Cancel

Available Permission Sets

--None--

Add

Remove

Enabled Permission Sets

Two Factor Authentication


Save Cancel

6. Now, log out from Salesforce and log in using your credentials; you will come across the following page:

Add a Time-Based Token

To ensure your account's security, you must add a token that's used to verify your identity when you log in.


Download the [authenticator app](#) on your mobile device, scan this QR code, then enter the token.



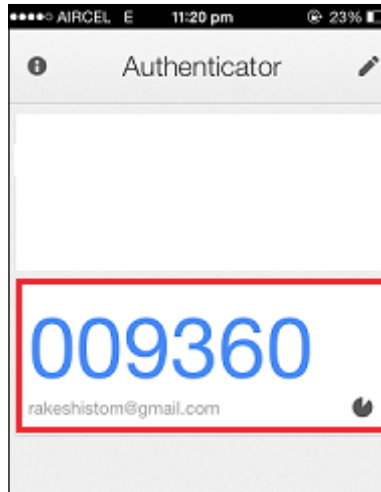
Token

Verify and Log In

[Can't scan the QR code?](#)



7. Open **Google Authenticator App** on your mobile and scan the QR code, and it will look like the following screenshot:




8. Enter this code in the login screen and access your organization.

Removing Time-Based Token/Two-Factor Authentication

It's very easy to do this; just navigate to the user's record and click on the **Remove** link beside **Time-Based Token**:



[ To install Google's Authenticator app, visit <https://support.google.com/accounts/answer/1066447>.]

Session setting and its effect on users

A session is the period of time during which a user interfaces with Salesforce. The user session begins when the user accesses the Salesforce organization and ends when the user logs out of it. You can set **Session Settings** in Salesforce according to the organization security you want. For example, the system administrator of Appiuss, Sagar Pareek, wants to expire the session of every inactive user after 30 minutes, to ensure security.

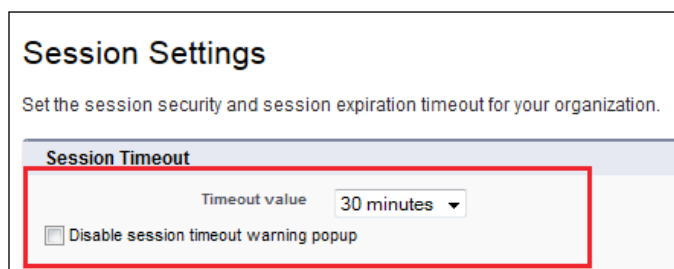
In order to achieve this, follow these steps:

1. Navigate to **Setup | Administer | Security Controls | Session Settings**:



2. It will redirect you to customize the **Session Security Settings** page.
3. In **Timeout value**, set the value to **30 minutes**. You can also select various session settings, listed as follows, depending on what happens when the session expires:
 - **Lock sessions to the IP address from which they originated**
 - **Require secure connections (HTTPS)**
 - **Force relogin after Login-As-User**
 - **Require HttpOnly attribute**

You can also enable SMS-based identity confirmation. The following screenshot shows the various session settings:



4. Once done, click on **Save**.



You select a minimum of 15 minutes to a maximum of 12 hours of timeout value. It is recommended that you use the minimum values for added security for your organization.

Additionally, you can set the following settings under **Session Settings**:

Field	Description
Disable session timeout warning pop up	If enabled, it will prompt a notification 30 seconds before the expiration of the session to the user.
Lock sessions to the IP address from which they originated	This option allows you to lock the session to a particular IP address. This prevents the session from being hijacked.
Require secure connections (HTTPS)	By default, this is enabled, and ensures that the user logs in from HTTPS, except Force.com sites, which can be accessed from an HTTP.
Force relogin after Login-As-User	If your administrator is privileged to log in on behalf of another user, this option allows returning back to the previous session after logging out. If this option is enabled, the administrator is asked to relogin after logging out as the privileged user.
Require HttpOnly attribute	This option restricts the session ID's cookie access.
Enable caching and password autocomplete on login page	By default, this is enabled. This option allows your browser to store usernames.
Enable SMS-based identity confirmation	This option, if enabled, asks users to enter a PIN received on their registered mobile number via an SMS.
Login IP Ranges	By using this option, you can define the valid IP range from which users can log in. This field is not available in Enterprise, Unlimited, Performance, and Developer Editions. In these editions, you can specify a valid IP address per profile.
Enable clickjack protection for setup pages	This protects against clickjack attacks on setup Salesforce pages.
Enable clickjack protection for non-setup Salesforce pages	This protects you against clickjack attacks on non-setup Salesforce pages.
Enable clickjack protection for non-setup customer Visualforcepages	This protects you against clickjack attacks on your Visualforce pages. If you use custom Visualforce pages within a frame or iframe, you may see a blank page, or the page may display without the frame.

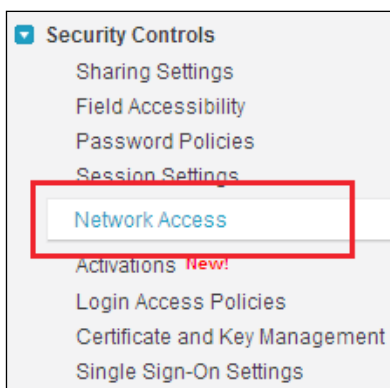
Field	Description
Enable CSRF protection on GET requests on non-setup pages	This protects against Cross-site Request Forgery (CSRF) attacks by modifying non-setup pages to include a random string of characters in the URL parameters or as a hidden form field.
Enable CSRF protection on POST requests on non-setup pages	This protects against CSRF attacks by modifying non-setup pages to include a random string of characters in the URL parameters or as a hidden form field.

Network access – securing your organization's data

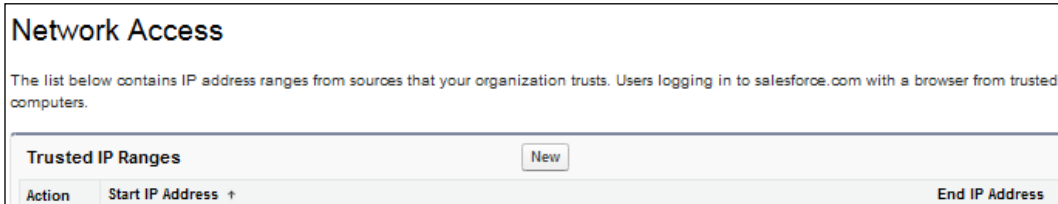
The system administrator of Appiuss knows that data available in their organization is sensitive, and they want to make sure that it should always be kept safe and secure from every angle, and no one other than the permitted users may log in to the organization. They also want to make sure that in the worst-case scenario, if any rival gets a username and password, they must not be able to log in. The system administrator knows that the users always log in from the company's network, so it is easier to restrict the login to the company's network.

To achieve this, you can follow these steps:

1. Navigate to **Setup | Administer | Security Controls | Network Access**:



2. Click on **New**.



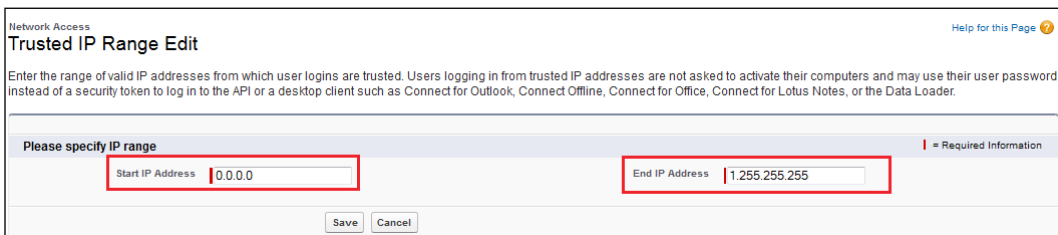
Network Access

The list below contains IP address ranges from sources that your organization trusts. Users logging in to salesforce.com with a browser from trusted computers.

Action	Start IP Address	End IP Address

[New](#)

3. Enter the valid IP range of your organization in the **Start IP Address** and **End IP Address** fields:



Network Access [Help for this Page](#)

Trusted IP Range Edit


Enter the range of valid IP addresses from which user logins are trusted. Users logging in from trusted IP addresses are not asked to activate their computers and may use their user password instead of a security token to log in to the API or a desktop client such as Connect for Outlook, Connect Offline, Connect for Office, Connect for Lotus Notes, or the Data Loader.

Please specify IP range ! = Required Information

Start IP Address End IP Address

[Save](#) [Cancel](#)

4. If your organization is using a static IP address, make sure you enter the same IP address in both fields.
5. Click on **Save**.

 The start and end IP addresses in an IPv4 range must include no more than 33,554,432 addresses. The following ranges are valid:

- 0.0.0.0 to 1.255.255.255
- 132.0.0.0 to 132.255.255.255
- 132.0.0.0 to 133.255.255.255

Removing activated IP activations

When you log in from an unknown device with a new IP address, Salesforce asks you to provide an identity confirmation code that is delivered via e-mail, SMS, or a mobile authentication app. Once you enter the identity confirmation code, the device (and client browser) is considered as activated. You can use this method when you don't have your cell phone, or if it is lost, you can ask your administrator to remove the old IP address so that no one can get unauthorized access to your Salesforce system. Once your IP is activated, Salesforce won't ask you for an identity confirmation again.

To remove an activated IP, follow these steps:

1. Navigate to **Setup | Administer | Security Controls | Activations**:

Username	Login IP	Created Date
<input checked="" type="checkbox"/> pareeksagarpareek@gmail.com.book	14.98.38.126	8/6/2013 8:43 AM
<input checked="" type="checkbox"/> pareeksagarpareek@gmail.com.book	14.98.226.154	8/11/2013 4:38 PM
<input type="checkbox"/> pareeksagarpareek@gmail.com.book	115.244.209.182	8/11/2013 5:14 PM
<input type="checkbox"/> pareeksagarpareek@gmail.com.book	117.199.114.107	8/18/2013 1:11 AM
<input type="checkbox"/> pareeksagarpareek@gmail.com.book	122.177.43.113	8/22/2013 10:57 AM

2. Select the **Login IP** that you want to remove and then click on **Remove**.
3. In their next login attempt, the user has to provide a confirmation of their identity.

Setting up login access policies

If your organization wants to access any user's owned information without first asking them to grant the administrator with the permission to log in on their behalf, the system administrator can enable login access policies for the organization.

You can do this in the following manner:

1. Navigate to **Setup | Administer | Security Controls | Login Access Policies**.
2. To allow the administrator to log in on any user's behalf without first asking them, enable the **Administrators Can Log in as Any User** option. This option is not available by default; you need to raise a case with Salesforce.com to enable it:

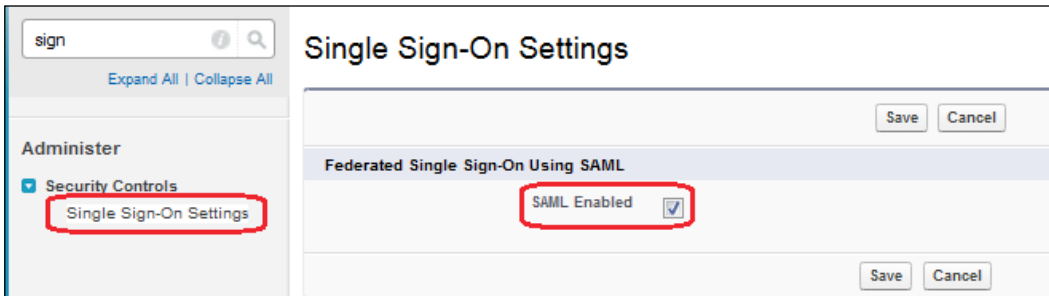
Support Organization	Packages	Available to Users	Available to Administrators Only
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>
salesforce.com Support	Salesforce for Google AdWords	Not Available	<input type="radio"/>

3. Additionally, if you want to prevent users from granting access to publishers, click on **Available to Administrators Only** for that publisher.
4. Click on **Save**.

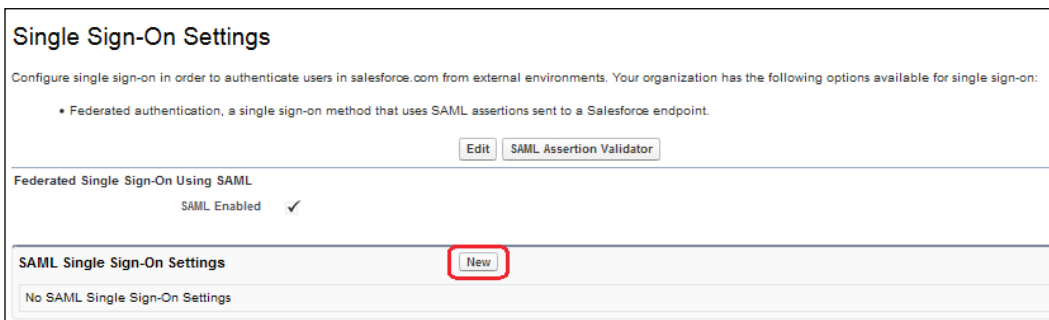
Single sign-on settings

Single sign-on allows users to log in via external environments. To configure the single sign-on setting for your organization, follow these steps:

1. Navigate to **Setup | Security Controls | Single Sign-On Settings**.
2. Click on the **Edit** button and select the **SAML Enabled** checkbox:



3. Click on **Save**.
4. You will be redirected back to the **Single Sign-On** page.
5. Under **SAML Single Sign-On Settings**, click on **New**:



6. It will redirect you to the **SAML Single Sign-On Setting** page where you have to provide various details:

The descriptions of the various fields are found in the following table:

Field	Description
Name	Enter the full name.
SAML Version	Select the appropriate SAML version.
Issuer	Enter the identity provider's name.
Identify Provider Certificate	Click on the Browse button to upload the authentication certificate issued by your identity provider.
Custom Error URL	Enter the URL that users should be redirected to, in case any errors occur during SAML login.
SAML Identity Type	Specify what the SAML identity type will be. You can select either using the Salesforce.com users or the Federated ID.
SAML Identity Location	Specify the location of the SAML identity.

Authentication providers

These days, we are using various login credentials to access multiple websites such as Facebook and Janrain. To access these websites, you have to remember multiple login credentials, and if you are using Salesforce, that is one more credential to remember. Once you enable this feature, users can log in to Salesforce from an external service provider such as Facebook or Janrain, and there is no need to remember one more credential to log in to Salesforce. You can use your favorite account to log in to Salesforce.

To configure an authentication provider successfully for single sign-on, you need to perform the following activities:

1. Configure the login service provider website.
2. Use Apex to create a registration login handler.
3. Define the authentication provider in your Salesforce.com organization.
4. Once you set up the authentication provider, the steps that a user has to perform will be described as follows.
5. Users will try to log in to Salesforce.com using third-party identity credentials.
6. The login request will be redirected to an authentication provider for the service provider.
7. The third-party service provider authenticates the login credentials and redirects the user to Salesforce.com with the credentials.
8. Finally, the user gets access to Salesforce.com.

To configure the authentication provider in Salesforce.com, you have to follow these steps:

1. Navigate to **Setup | Administer | Security Controls | Auth. Providers**.
2. Click on **New**, as shown in the following screenshot:



3. It will redirect you to a new page, where you have to select the authentication provider.

4. The following is a screenshot for Facebook as the authentication provider:

The screenshot shows the 'Auth. Provider Edit' form for Facebook. The form has a title bar 'Auth. Provider Edit' with 'Save', 'Save & New', and 'Cancel' buttons. The form fields are as follows:

- Provider Type: Facebook (dropdown menu)
- Name: [Red mark] [Text input field]
- URL Suffix: [Red mark] [Text input field]
- Consumer Key: [Red mark] [Text input field]
- Consumer Secret: [Red mark] [Text input field]
- Custom Error URL: [Text input field]
- Registration Handler: [Text input field] with a magnifying glass icon and a link: [Automatically create a registration handler template](#)
- Execute Registration As: [Text input field] with a magnifying glass icon
- Portal: --None-- (dropdown menu)

At the bottom of the form, there are 'Save', 'Save & New', and 'Cancel' buttons.

5. Here, you have to specify information for the mandatory fields (the fields that feature a red mark). The fields shown depend on the authentication provider. The description of various fields is as follows:

Field	Description
Name	This specifies the name of the authentication provider.
URL Suffix	This specifies the suffix to be used in client configuration URLs.
Consumer Key & Secret	The authentication provider provides this information. In this scenario, Facebook will provide the information when you create an application in Facebook.
Custom Error URL	This is an optional field where you can specify the URL to be used by the provider to report any errors.
Registration Handler	This is the Apex class used for registration handling.
Portal	If the SSO needs to be extended to portal users, select an appropriate portal for this.

6. Once done, click on **Save**.

View Setup Audit Trail

Salesforce.com keeps an Audit Trail of configuration changes made in the **Setup** section. This Audit Trail is available for administrators to track recent setup changes. This becomes especially helpful if there are multiple administrators for your organization. Let's start with an example where Appiuss has many system administrators and they want to track who changed the configuration. Only the system administrator or a user with View Setup and configuration permission can use this feature. You can see the last 20 entries under Setup Audit Trail and are able to download data of the last six months for your organization.

To access the Audit Trail, follow these steps:

1. Navigate to **Setup | Administer | Security Controls | View Setup Audit Trail**:

The last 20 entries for your organization are listed below. You can **download** your organization's setup audit trail for the last six months (Excel .csv file).

Date	User	Action	Section	Delegate User ?
8/5/2014 9:49:00 PM IST	rakeshistom@7demo.com	Changed menu items for Salesforce1	Manage apps	
8/5/2014 9:47:14 PM IST	rakeshistom@7demo.com	Changed Page MyProfilePage	Page	
8/5/2014 9:47:09 PM IST	rakeshistom@7demo.com	Changed Page MassUnfollowPage	Page	
7/24/2014 7:44:33 AM IST	rakeshistom@7demo.com	Changed Action Layout for action: New Event	Global Actions	
7/24/2014 7:43:53 AM IST	rakeshistom@7demo.com	Changed Action Layout for action: New Event	Global Actions	
7/24/2014 7:42:34 AM IST	rakeshistom@7demo.com	Created custom field: Type (Picklist)	Customize Activities	

[Download setup audit trail for last six months \(Excel .csv file\)](#)

2. The preceding screenshot shows the last 20 most recent configuration changes for your organization.

The description of the various fields is as follows:

Field	Description
Date	The Audit Trail shows the date/time for every change.
User	This field shows the information about the user who made the change, in this case, the username.
Action	This field shows the action taken by the user. Examples include changing the workflow rule name and object name, field creation, and password change.

Field	Description
Section	This shows which section was impacted by the change, for example, customize accounts, workflow, manage users, reports, groups, and so on.
Delegate User	This shows the name of the delegated user who made the changes. This will have value only if changes made by the delegated user are on behalf of another user.

Audit Trail key concepts

You can check Audit Trail for the mentioned section/type of changes:

- **Administration:** This will track various administration changes such as changes in the company information, multiple currencies, users, e-mail address changes, profile changes, roles, record types, creating e-mail footers, and domain name changes.
- **Customization:** These changes are related to the interface changes, forecasts, contracts, ideas, field tracking in feeds, support-related settings, process setups, and changes to groups.
- **Security and sharing:** These are related to security settings and sharing, such as password policy changes, session setting changes, changes in SAML settings, and so on.
- **Data management:** These changes are related to the mass deletion of records, data export requests, the mass transfer of records and import wizard usage, and changes in analytic snapshots.
- **Development:** This change is related to Apex classes, triggers, and Visualforce. Changes can include modifications to triggers, classes or Visualforce; remote site access setup; and Force.com site setup.
- **Various setups:** These include various setup changes such as the creation of an API, usage metering notifications, territories usage, workflow and approvals settings, and AppExchange package installation/uninstallation, and creation and deletion of workflow actions are also tracked.
- **Using the application:** These changes are related to the changes in the account team and opportunity team selling settings, Google App services, and the enabling and disabling of partner and customer portal users.

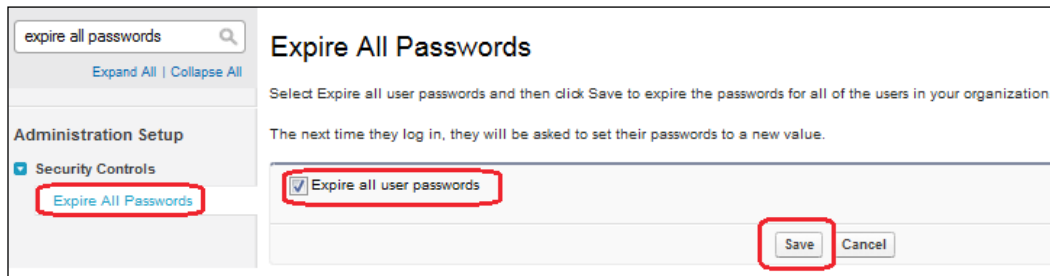


The View Setup Audit Trail page only shows the 20 most recent entries in the list. To download the full audit history for the last 180 days, click on the download link. If you want to learn more about the types of changes in the setup Audit Trail history tracks, visit https://help.salesforce.com/htviewhelpdoc?id=admin_monitorsetup.htm&siteLang=en_US.

Expire all passwords

Salesforce is giving you the flexibility to expire all users' passwords at any time to enforce extra security for your organization. Only the system administrator or users with the manage user permission can use this feature. If all the passwords have expired, and the user tries to log in the next time, they will be forced to set a new password. To expire all passwords, follow these steps:

1. Navigate to **Setup | Administer | Security Controls | Expire All Passwords**.
2. Select the **Expire all user passwords** checkbox, as shown in the following screenshot:



3. Click on **Save**.



This will not affect the users who have the **Password Never Expires** permission.

Concepts of delegated administration

Let's start with an example where Appiuss has 5,000 Salesforce Enterprise Edition licenses, and they have only one system administrator. The system administrator receives ample requests to reset the password, change login hours, unlock users, or change their sharing settings daily. To reduce this, the system administrator can go ahead and set up a delegated administrator, so that any other user who is a delegated administrator can help with the workload.

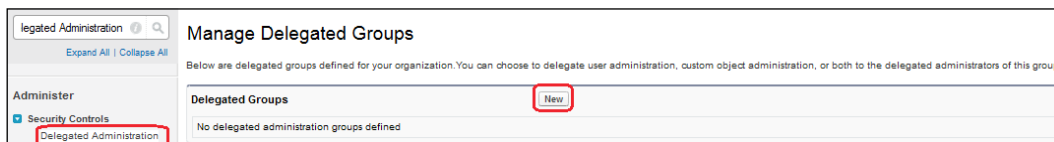
The delegated administrator is a concept that extends certain admin privileges to non-admin users in order to allow them to perform admin functions. The actions that delegated administrators can perform include the following:

- **User administration:** For the named roles and their entire subordinate roles, delegated administrators can create and edit users and reset passwords, as well as unlock users in named roles. Delegated users can also log in as users who have granted login access to their administrator. They can also do quota settings, create default teams, and create personal groups.
- **Assignable profiles:** The delegated administrators can assign only the profiles granted to the delegated administrator.
- **Custom object administration:** Access can be granted to delegated administrators to serve as administrators for certain custom objects and their associated tabs only.

Setting up a delegated administration

To set up a delegated administration for your organization, follow these steps:

1. Navigate to **Setup | Administer | Security Controls | Delegated Administration**.
2. Click on **New** as shown in the following screenshot:



- It will redirect you to a **New Delegated Group** window, where you have to enter data in the **Delegated Group Name** field as well as optionally select the **Enable Group for Login Access** checkbox. The details of each field are as follows:
 - Delegated Group Name:** This specifies the group name.
 - Enable Group for Login Access:** This option is selected if you want to allow the delegated administrator to log in as a user belonging to the role hierarchy that they manage.

Delegated Group Edit

New Delegated Group

Delegated Group Edit Save Cancel

Delegated Group Name Delegated user group Enable Group for Login Access

Save Cancel

- Click on **Save**; this will redirect you to the **Delegated Group Detail** page. This will look like the following screenshot:

Delegated Group

Delegated user group

Delegated Group Detail Edit Delete

Delegated Group Name Delegated user group Enable Group for Login Access

Created By Rakesh Gupta, 2/23/2014 4:29 PM Modified By Rakesh Gupta, 2/23/2014 4:41 PM

Delegated Administrators Add

No delegated administrators specified.

User Administration Add

No roles specified.

Assignable Profiles Add

No profiles assigned.

Custom Object Administration Add

No custom objects specified.

- After creating the delegated user group, you have to do a few tasks, defined as follows:
 - Delegated administrators:** You can add users to this group who are a part of the delegated administrator group. To do this, click on the **Add** button available on the list related to **Delegated Administrator**; it will redirect you to a new page and add users (click on the magnifying glass icon) as per your business requirement. Once done, click on **Save**:


Delegated Administrators

Add users to this delegated administration group. These users will be authorized to act as administrators for the designated setup tasks.

Save Save & More Cancel

Delegated Administrators

User6 Test	

 Only users whose profiles include the **View Setup and Configuration** permission can be delegated administrators.

- **User Administration:** Now, you have to specify the roles and subordinates that the delegated administrators can create and edit. To do this, click on the **Add** button available in the list related to **Role Administrator**; this will redirect you to a new page and add a role (click on the magnifying glass icon) as per your business requirement. Once done, click on **Save**:

Roles and Subordinates

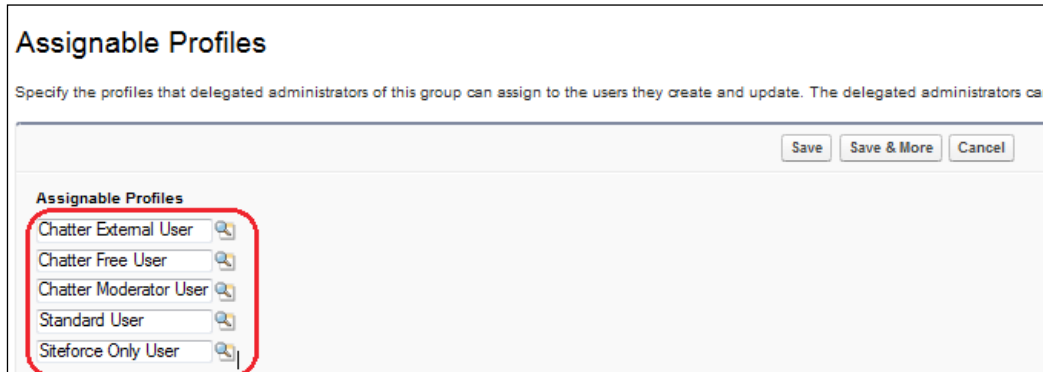
Specify the roles and subordinates for which delegated administrators of this group can create and edit users. The delegated administrators

Save Save & More Cancel

Roles and Subordinates

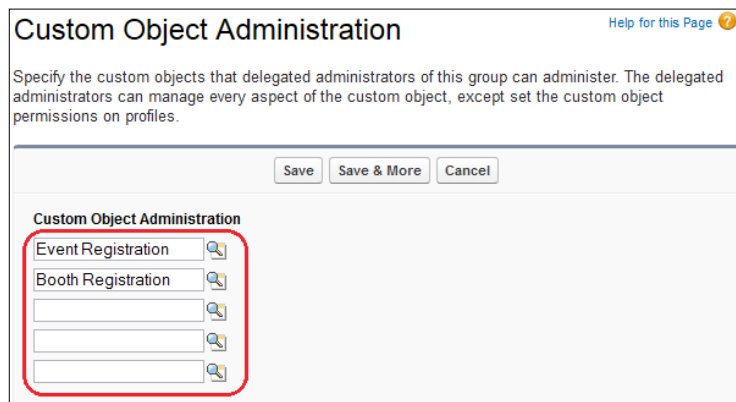
Marketing Agents	

- **Assignable Profiles:** Here, you can specify the profiles of the delegated administrators of this group and these can be assigned to the users they create or update. To do this, click on the **Add** button available on the list related to **Assignable Profiles**; this will redirect you to a new page and add assignable profiles as per your business requirement. Once done, click on **Save**:



 Delegated administrators cannot assign profiles with the permission **Modify All Data**, such as system administrator profiles.

- **Custom Object Administration:** In this section, you can specify the custom objects that the delegated administrators of a group can administer. To do this, click on the **Add** button found on the list related to **Custom Object Administration**; it will redirect you to a new page, and here, you can add custom objects (click on the magnifying glass icon) as per your business requirement. Once done, click on **Save**:



Now, you are done with the delegated administrator settings. You can change these settings any time by navigating to **Setup | Administer | Security Controls | Delegated Administration**.

These changes are captured under View Setup Audit Trail. If you need to check the Audit Trail for these changes, navigate to **Setup | Administer | Security Controls | View Setup Audit Trail**. Finally, our delegated administrator page will look like the following screenshot:

The screenshot displays the 'Delegated user group' configuration page in Salesforce. It includes sections for group details, administrators, user administration, assignable profiles, and custom object administration.

Delegated Group Detail		
Delegated Group Name	Delegated user group	Enable Group for Login Access <input checked="" type="checkbox"/>
Created By	Rakesh Gupta, 2/23/2014 4:29 PM	Modified By Rakesh Gupta, 2/23/2014 5:03 PM

Delegated Administrators		
Action	Users	Modified By
Remove	User@_Test	Rakesh Gupta, 2/23/2014 4:46 PM

User Administration		
Action	Roles and Subordinates	Modified By
Remove	Marketing Agents	Rakesh Gupta, 2/23/2014 4:50 PM

Assignable Profiles		
Action	Profiles	Modified By
Remove	Chatter External User	Rakesh Gupta, 2/23/2014 4:58 PM
Remove	Chatter Free User	Rakesh Gupta, 2/23/2014 4:56 PM
Remove	Chatter Moderator User	Rakesh Gupta, 2/23/2014 4:58 PM
Remove	Chatter Only User	Rakesh Gupta, 2/23/2014 4:56 PM
Remove	Standard User	Rakesh Gupta, 2/23/2014 4:56 PM

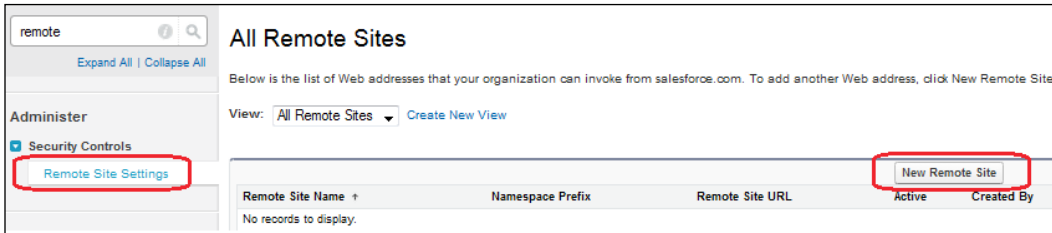
Custom Object Administration		
Action	Custom Objects	Modified By
Remove	Enable Chatter Trigger	Rakesh Gupta, 2/23/2014 5:03 PM
Remove	TimeSheet	Rakesh Gupta, 2/23/2014 5:03 PM

Remote site settings

Salesforce allows you to access external website resources from a Salesforce application for your organization. You can access these external websites through Visualforce pages, Apex Callout, and via XMLHttpRequest calls. To avoid accessing malicious websites from Salesforce.com, the website first needs to be registered with remote site settings. Once the site is registered, it can be used within Salesforce.com.

To register a new site, follow these steps:

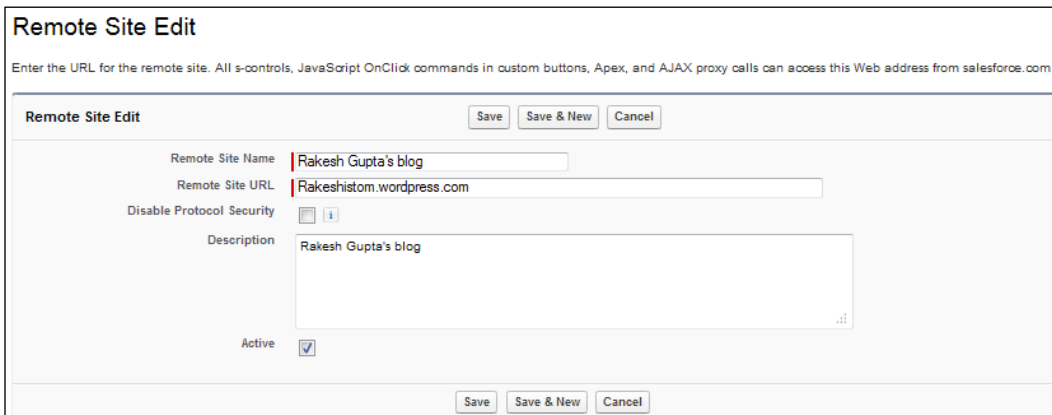
1. Navigate to **Setup | Administer | Security Controls | Remote Site Settings**.
2. Click on the **Remote Site Edit** button to add a new site:



It will redirect you to a new page where you have to fill in the required information to register the new site. The description of various fields is as follows:

Field	Description
Remote Site Name	Here, you can enter the name of the remote site.
Remote Site URL	Here, you can enter the URL for the remote site.
Disable Protocol Security	Select this to allow access to the remote site regardless of the HTTP or HTTPS protocol.
Description	Here, you can provide a description for the remote site.
Active	To make the remote site active, select this checkbox.

The following is a screenshot of what you'll see:



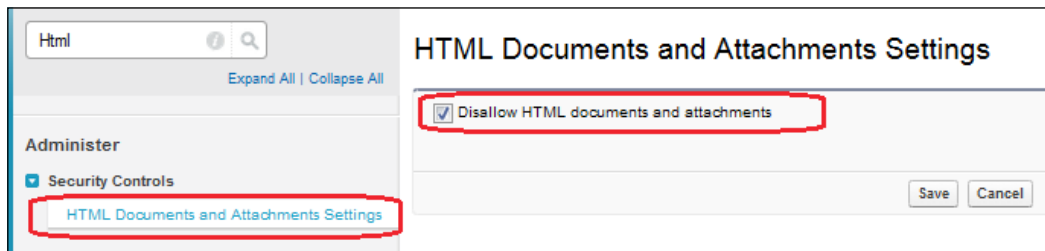
3. Once you are done, click on **Save**.

HTML documents and attachments settings

Salesforce allows you to upload various types of documents. These documents can be uploaded in the notes and attachments section of any record or in the documents section. Uploading HTML can be a security risk (due to an XSS attack), and for security reasons, your organization may prohibit this type of document upload to Salesforce. Once this feature is enabled, it doesn't allow users to upload a file with any of these extensions: `htm`, `html`, `htt`, `htx`, `mhtml`, `mhtml`, `shtm`, `shtml`, and `acgi`. These settings won't affect the previously-uploaded HTML documents and attachments, but when users try to view an HTML attachment or document, their browser first prompts them to open the file in the browser, save it to their computer, or cancel the action. This feature won't affect the attached HTML document on e-mail templates.

To prohibit the uploading of HTML attachments and documents, follow these steps:

1. Navigate to **Setup | Administer | Security Controls | HTML Documents and Attachments Settings**.
2. Select the **Disallow HTML documents and attachments** checkbox:



3. Click on **Save**.

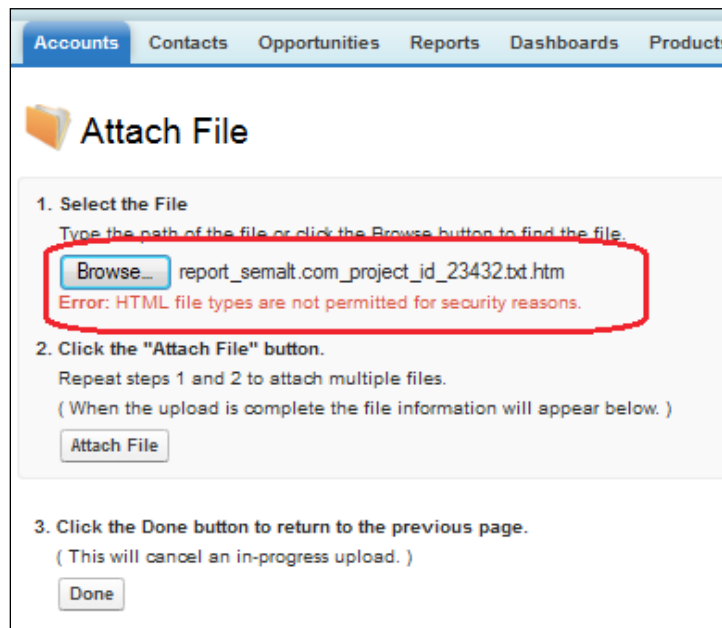


Do not enable this setting if your organization uses the partner portal to give your partner users access to Salesforce.

Testing document and attachment settings

If you want to test this feature, follow these steps:

1. Click on the **Account** tab.
2. Navigate to the records details page in which you want to attach the document.
3. Navigate to the list related to **Notes & Attachments**.
4. Click on the **Attach file** button and try to upload the HTML file, and you will get an error, as shown in the following screenshot:



Portal Health Check

By using partner and customer portals, you can collaborate with both your customers and partners. A partner portal is a great way to share and capture leads, accounts, and contacts with your third-party partner. A customer portal is another way to offer efficient and faster services to your customer from the cloud. Your customers and partners can access your information via portals in many ways. To ensure your data security, it's important to keep in mind and follow best practices for portal implementation.

The Portal Health Check Report provides a summary of the access level for data on the portals. Using Portal Health Check, you can improve portal security. To access various Portal Health Check Reports, you can navigate to **Setup | Administer | Security Controls | Portal Health Check**:

The screenshot shows the Salesforce Admin console interface. At the top, there is a search bar with 'portal health check' entered. Below it, the 'Administer' sidebar is visible, with 'Security Controls' expanded and 'Portal Health Check' highlighted with a red box. The main content area displays 'Portal Health Check Reports' with a summary and a table of reports.

Report	Results
Administrative and User Permissions	7 portal profiles (0 portal users) have permissions that expose your data
Object Access and Field-Level Security	7 portal profiles can access 12 standard objects and 0 custom objects
Sharing Organization-Wide Defaults	10 standard objects and 0 custom objects have a Public sharing model. Your organization has 0 portal users
Sharing Rules	Portal users can access 0 standard objects and 0 custom objects because of Sharing Rules

Portal Health Check Reports

Salesforce provides four types of Portal Health Check Reports to check different types of information. The four reports are as follows, and we will go through each of them in detail:

- Administrative and User Permissions
- Object Access and Field-Level Security
- Sharing Organization-Wide Defaults
- Sharing Rules

Administrative and User Permissions

The **Administrative and User Permissions** report provides information about the User Permissions granted to the portal users. You can click on the profile link to see the detailed information; it will redirect you to the profile detail page. The following screenshot shows the **Administrative and User Permissions** reports:

The screenshot shows the 'Administrative and User Permissions' report in the Salesforce Admin console. The report title is 'Administrative and User Permissions' and the results indicate '7 portal profiles (0 portal users) have permissions that expose your data'. Below the report, there is a table of portal profiles with various permissions.

Profile Name	Number of Portal Users	Delegated External User Administrator	Send Email	Convert Leads	Edit Events	Edit Opportunity Product Sales Price	Edit Tasks	Transfer Cases	Portal Super User	API Enabled	Password Never Expires	Creates Libraries	View Content in Portals	Export Reports	Run Reports
Customer Portal Manager	0	<input type="checkbox"/>	N/A	N/A	N/A	N/A	N/A	N/A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Portal Manager Custom	0	<input type="checkbox"/>	N/A	N/A	N/A	N/A	N/A	N/A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Portal Manager Standard	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
Customer Portal User	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	0	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Partner Community Login User	0	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N/A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Partner Community User	0	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N/A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Object Access and Field-Level Security

You can use the **Object Access and Field-Level Security** report to check the object and Field-Level Security for objects. You can filter the list of objects available by changing the option in the **View** dropdown. The following screenshot shows the list of **Objects** with the **Number of Portal Profiles** using that object. To see the Field-Level access, click on the name of the object in the report.

Portal Health Check Reports

[Back to list: Portal Health Check Reports](#)

Report: Object Access and Field-Level Security

Results: 7 portal profiles can access 12 standard objects and 0 custom objects

View: All Objects

Object Access and Field-Level Security

Object	Number of Portal Profiles	Object Type
Account	7	Standard
Asset	6	Standard
Campaign	3	Standard
Case	7	Standard
Contact	7	Standard
Document	7	Standard
Idea	7	Standard
Lead	3	Standard
Opportunity	3	Standard
Price Book	3	Standard
Product	3	Standard
Solution	7	Standard

In our case, click on **Account**, which will redirect you to another page from where you can check the Field-Level Security of different profiles by clicking on the **Field-Level Security** link, as shown in the following screenshot:

Portal Health Check Reports

[Back to list: Portal Health Check Reports](#) > [Object Access and Field-Level Security](#)

Report: Object Access and Field-Level Security

Results: 7 portal profiles can access Account object, and can view 20 fields

View: All Portal Profiles

Object Access and Field-Level Security: Account

Profile Name	Number of Portal Users	Field-Level Security	Read	Create	Edit	Delete
Customer Portal Manager	0	11 visible fields	✓	<input type="checkbox"/>	<input type="checkbox"/>	N/A
Customer Portal Manager Custom	0	11 visible fields	✓	<input type="checkbox"/>	<input type="checkbox"/>	N/A
Customer Portal Manager Standard	0	11 visible fields	✓	<input type="checkbox"/>	<input type="checkbox"/>	N/A
Customer Portal User	0	11 visible fields	✓	<input type="checkbox"/>	<input type="checkbox"/>	N/A
Gold Partner User	0	20 visible fields	✓	✓	✓	N/A
Partner Community Login User	0	17 visible fields	✓	✓	✓	N/A
Partner Community User	0	17 visible fields	✓	✓	✓	N/A

Sharing Organization-Wide Defaults

The **Sharing Organization-Wide Defaults** report provides information on the default access level for the objects. The access level indicates whether the object record is accessible. The access level can be read, write, or transfer. Under the **Security** column, you can find the security strength for different objects:

Portal Health Check Reports

[Back to list: Portal Health Check Reports](#)

Report: Sharing Organization-Wide Defaults

Results: 10 standard objects and 0 custom objects have a Public sharing model. Your organization has 0 portal users

View: All Objects

Sharing Organization-Wide Defaults [Edit](#)

Object	Default Access	Grant Access Using Hierarchies	Security
Lead	Public Read/Write/Transfer	✓	Weak
Account, Contract and Asset	Public Read/Write	✓	Weak
Contact	Controlled by Parent	✓	Weak
Opportunity	Public Read Only	✓	Weak
Case	Public Read/Write/Transfer	✓	Weak
Campaign	Public Full Access	✓	Weak
Activity	Private	✓	Strong
Calendar	Hide Details and Add Events	✓	Weak
Price Book	Use	✓	Weak
Access	Private	<input type="checkbox"/>	Strong
Badge Definition	Public Read Only	<input type="checkbox"/>	Weak
Thanks	Public Read Only	<input type="checkbox"/>	Weak

Sharing Rules

If any of the Sharing Rules impact the portal users, then the objects visible to the portal users are visible in this report. The following screenshot shows an example of a Sharing Rules report:

Portal Health Check Reports

[Back to list: Portal Health Check Reports](#)

Report: Sharing Rules

Results: Portal users can access 0 standard objects and 0 custom objects because of Sharing Rules

View: All Objects

Sharing Rules

Action	Object	Owned By	Shared With	Access	Number of Portal Users Affected
No more records to display.					



Portal Health Check Reports are accessible only when a customer or partner portal is enabled for your organization.

Summary

In this chapter, we have gone through various security setting features available on Salesforce. Starting from OWD, followed by Sharing Rules and Field-Level Security, we also covered password policy concepts and two-factor authentication in Salesforce. Finally, we discussed Audit Trails, remote site settings, and Portal Health Check-ups. Now, you should be able to understand and manage Salesforce.com's security settings to have an efficient form of data security, providing a balance between security of data access for users and limiting risk of misuse and loss of data. In the next chapter, we will go through the e-mail administration concepts, and we will also cover how to change your Salesforce login page as well as concepts related to My Domain.

4

Domain Management, E-mail Administration, and Google Apps Settings

In this chapter, we will discuss about domain settings, which is a way to customize the login page. We will also discuss various concepts related to e-mail administration in Salesforce. The following topics will be covered in this chapter:

- My Domain
- Customizing your Salesforce login page
- Various e-mail administration methods
- Google Apps settings

My Domain

You can improve security and brand your organization's login pages by enabling your custom domain. By using **My Domain**, you can define a custom Salesforce domain name. A custom Salesforce domain name helps you to manage login and authentication for your organization in numerous ways. Here are a few examples:

- Brand your Salesforce login page and customize the content of the right-hand side frame
- You can block or redirect page requests that don't use the new domain name
- Get better support for single sign-on
- You can set a custom login policy as per the requirement and determine how users are authenticated
- You can give users the option to select an alternate identity provider from the login page

Setting up My Domain

To define My Domain for your organization, follow these steps:

1. Navigate to **Setup | Administer | Domain Management | My Domain**.
2. Enter the subdomain name you want to use within the sample URL. For example, a company called Appiuss might want to use the subdomain Appiuss. The company's login URL would be `https://appiuss.my.salesforce.com/` (for Enterprise, Performance, Unlimited, Professional, and Groups Editions' production environment) and `https://appiuss-dev-ed.my.salesforce.com` for a Developer organization. You can use up to 40 characters.
3. Once you enter the name, click on the **Check Availability** button to check the validity of this domain.
4. Now, select the checkbox **I agree to the Terms and Conditions**.
5. Finally, click on the **Register Domain** button to complete the first stage.

My Domain [Help for this Page](#)

My Domain

Add a domain name to the URLs you use to log into and navigate Salesforce.com. Your domain name not only gives you another way to feature your brand, but also make your data more secure. Rollout is easy: after registering for your domain name, you can test it before opening it up to users. Built-in redirection tools help make the rollout seamless.

Step 1 Choose Domain Name

Choose Domain Name → Domain Registration Pending (Domain Name Reserved but Not Ready for Use) → Domain Ready for Testing (Domain Published to Internet, Domain Ready for Testing but Hidden from Users) → Domain Deployed to Users (Users directed to Domain, Domain User Settings Available)

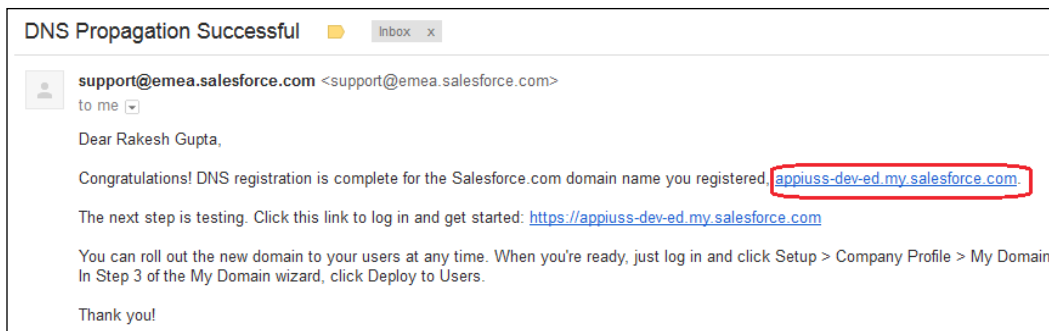
First, choose a subdomain to register for your organization. Choose carefully, because you can only register a subdomain once for your organization.

Subdomain names can include up to 40 letters, numbers, or hyphens. Your subdomain can't start or end with a hyphen.


✓ Available

I agree to the [Terms and Conditions](#)

6. Wait for 10 to 24 hours and check your mail; you will get an e-mail similar to the one shown in the following screenshot when your domain name is ready for testing. Once you set up the domain, you cannot modify the name.



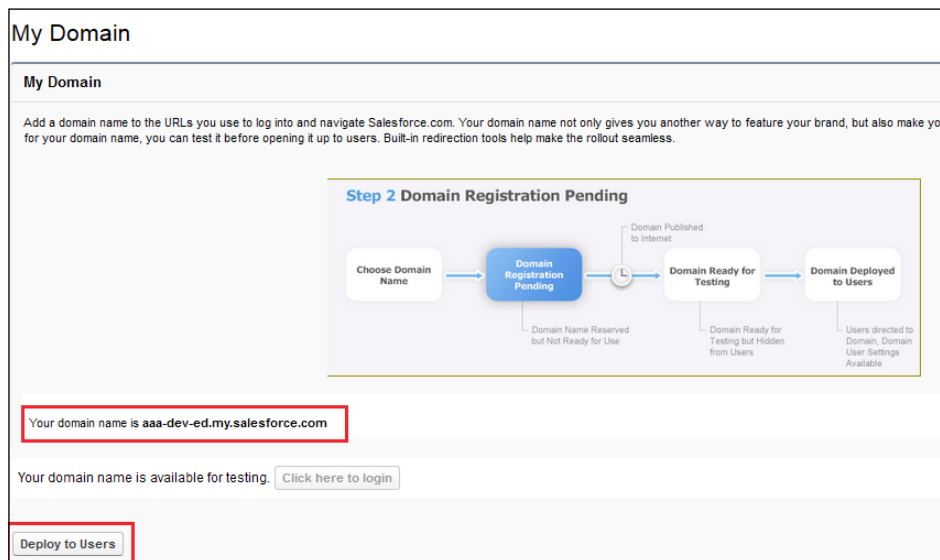
- Click on the link circled in red and log in to Salesforce by using your credentials.

 You can define a custom domain name only once. My Domain is also available for Sandbox environments. You can contact Salesforce support to delete the domain but not modify it.

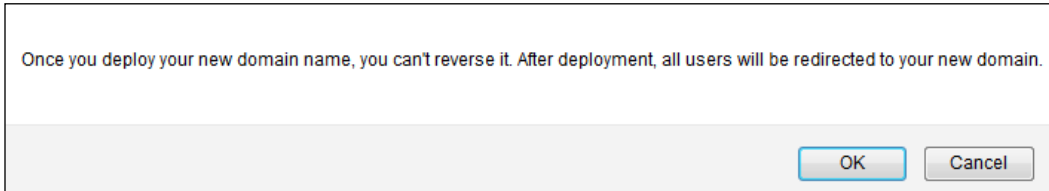
Deploying My Domain

Your domain will not be available to users until you have tested and deployed it. To deploy your domain, follow these instructions:

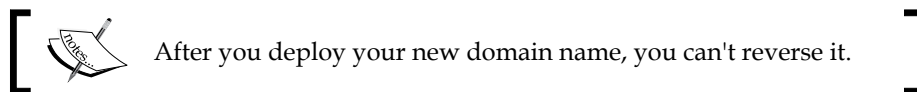
- Navigate to **Setup | Administer | Domain Management | My Domain**.
- Click on the **Deploy to Users** button, as shown in the following screenshot:



3. You will get the following pop-up message:



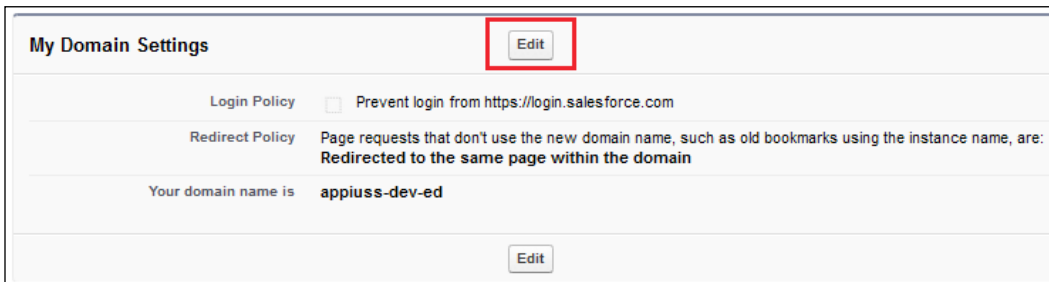
4. Click on **OK**, and it will redirect you to a new page where you can enter **My Domain Settings** and configure **Login Page Branding**.



My Domain Settings

Once you deploy My Domain for your users, you will come to a new page where you can change the **My Domain Settings** for your organization. To change your **My Domain Settings**, follow these instructions:

1. Navigate to **Setup | Administer | Domain Management | My Domain**.
2. Click on **Edit**, as shown in the following screenshot:



3. Under **Login Policy**, you can select **Prevent login from https://login.salesforce.com**, where you don't want to allow the user to log in except by using the My Domain login URL.

4. You can also select **Redirect Policy** for page requests that don't use the new domain name, such as old bookmarks.

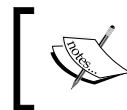
5. Once done, click on **Save**.



You cannot edit your domain name.

Customizing your Salesforce login page

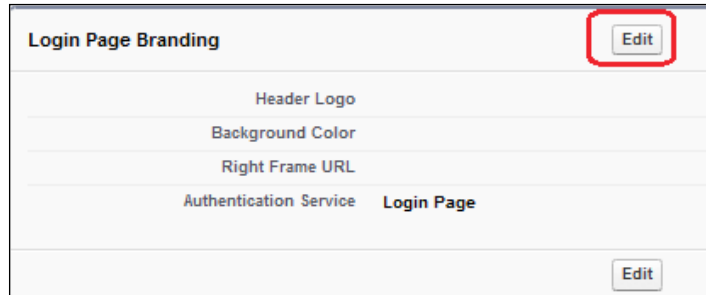
Whenever you try to log in to Salesforce by using `https://login.salesforce.com/` or `https://test.salesforce.com/`, you will be sent to Salesforce's default login page. For every organization, branding matters because we live in the Internet age. You can transform the look and feel of your Salesforce login page and use your branding as well.



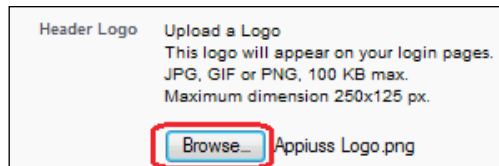
To customize the look and feel of your Salesforce login page, at least one domain must already be enabled for your organization.

To customize your Salesforce login page, follow these steps:

1. Navigate to **Setup | Administer | Domain Management | My Domain**.
2. Go to the **Login page branding** section and click on **Edit**.

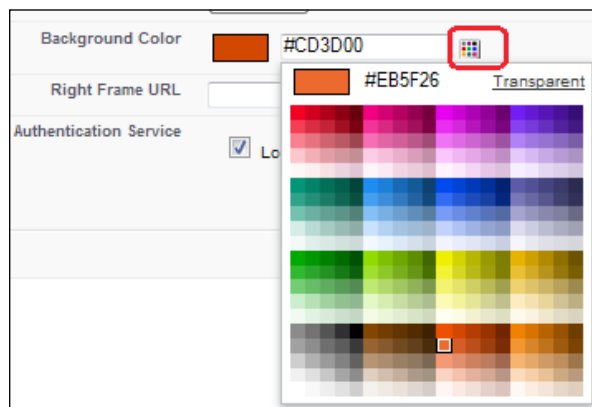


3. Click on **Browse** and upload the **Header Logo** if you want to use your organization's logo.

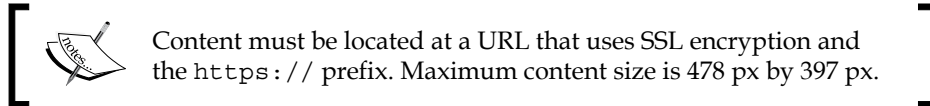


The logo will appear on your login pages in JPG, GIF, or PNG formats, which will be maximum 100 KB in size. The maximum dimensions allowed are 250 px x 125 px.

4. To change the background color of your login page, click on the color picker or enter a valid hexadecimal color code as shown in the following screenshot:



- To change **Right Frame URL** that is available on the right-hand side of the login frame, enter a correct iframe URL link.



- Select the **Authentication Service** option available on the page, as at least one authentication service is required.
- Click on **Save**.
- Log out from your Salesforce developer account, and Salesforce will redirect you to your customized login page.



Next time you use your My Domain URL to log in to Salesforce, it will redirect you to your custom login page.

Various e-mail administration methods

There are various ways to maintain e-mail administration in Salesforce. We will discuss the following points in brief:

- Deliverability
- Organization-Wide Addresses
- Compliance BCC Email
- Test Deliverability

- E-mail to Salesforce
- Delete attachments sent as Linkl
- E-mail Footers

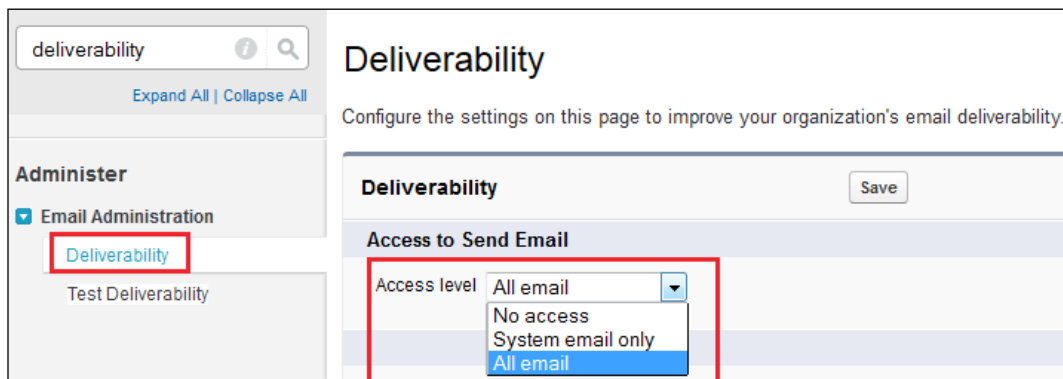
Deliverability

E-mail deliverability is a way to ensure that the company or an individual's e-mails reach its target recipient. If you want to boost the deliverability of an e-mail that you send from your Salesforce organization, you have to configure the deliverability settings.

Access to Send Email

If you want to control the types of e-mail that your organization can send, you have to follow these steps:

1. Navigate to **Setup | Administer | Email Administration | Deliverability**.
2. Go to the **Access to Send Email** section, and select the **Access level** dropdown:



There are three options under the **Access level** dropdown, and the description for each of them is as follows:

- **No access:** This option prevents all outbound e-mails to and from users. Workflow e-mail alerts will not work if you select this option.
- **System email only:** This option allows you to send auto generated e-mails, such as new user and password reset e-mails. This setting is especially useful for controlling the e-mails sent from Sandboxes so that the testing and development team don't send test e-mails to your users.

- **All email:** This option allows you to send all types of outbound e-mails.



Bounce Administration

The bounce e-mail administration features help you to ensure that the e-mail addresses you have for your contacts, leads, and personal accounts are correct. It also makes sure that the e-mails your users send to those addresses are not blocked due to excessive e-mail bounces.

To set up bounce e-mail administration for your organization, follow these steps:

1. Navigate to **Setup | Administer | Email Administration | Deliverability**.
2. Go to the **Bounce Administration** section. Now, you will have to select the **Activate bounce management** checkbox to enable the feature:

Bounce Administration

When bounce management is activated and a user sends an email to someone with an invalid email address, the email bounces to salesforce.com and the user is prevented from sending email to that address until the address is updated or confirmed.

Activate bounce management

Show bounce alert next to all instances of the email address ⓘ

Return bounced emails to sender ⓘ

Once the bounce e-mail administration feature is enabled and a user sends an e-mail to an invalid e-mail address, the e-mail bounces to Salesforce.com and the user is banned from sending any more e-mails to that address until the address is updated or confirmed. You can also select what happens when an e-mail bounces by selecting one of the following checkboxes available under **Activate bounce management**:

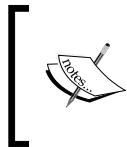
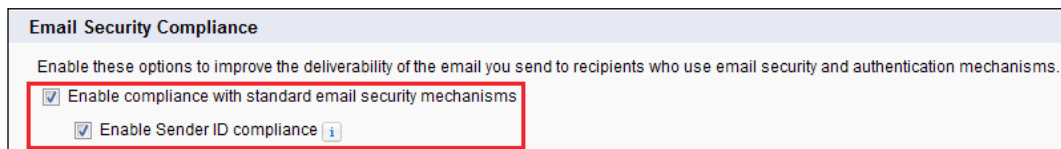
- **Show a bounce alert next to all instances of the email address:** If this checkbox is not selected, Salesforce only displays a bounce alert on the record from which the e-mail was originally sent.
- **Return bounced emails to sender:** If this checkbox is not selected, Salesforce displays the bounce alert but discards the bounce message. This feature is not recommended when using e-mail relay.

Email Security Compliance

The **Enable compliance with standard email security mechanisms** checkbox automatically modifies the **from** address of every e-mail you send from Salesforce to comply with e-mail security frameworks that your recipients might implement, such as SPF. If you select the **Enable Sender ID compliance** option, it declares that Salesforce.com e-mails come from an authorized IP address.

To set up bounce e-mail administration for your organization, follow these instructions:

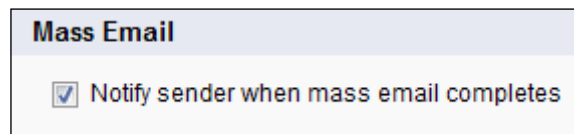
1. Navigate to **Setup | Administer | Email Administration | Deliverability**.
2. Go to the **Email Security Compliance** section. Now, you can activate this feature by selecting the checkbox that is shown in the following screenshot:



If you select the **Enable Sender ID compliance** checkbox, the recipient's e-mail client (not Salesforce) may append the phrase **Sent on behalf of** to the **from** field of e-mail received from Salesforce. This feature is not recommended when using e-mail relay.

Mass Email

You can notify your users with a status e-mail when their mass e-mails are complete by selecting **Notify sender when mass email completes**. With this option selected, Salesforce will send an e-mail notification once the mass e-mail completes. This option is available under the **Mass Email** section of the deliverability configuration page.



Organization-Wide Email Addresses

If your organization wants users to share a common e-mail name, you can define a list of Organization-Wide Addresses for each user profile. Organization-Wide Addresses define a common e-mail address that a user profile can use. When sending an e-mail from Salesforce, users with these profiles can select a different **from** address than the e-mail address they have defined and replies are sent to the Organization-Wide Address.

Let's start with an example. Whenever an e-mail alert is triggered from the workflow e-mail alert, it displays the user's personal e-mail address. To brand your organization, you can define multiple Organization-Wide Address like `admin@appiuss.com` and `Sales@appiuss.com` for your organization that a user's profile can use. Users can select from which address they want to send e-mail alerts while configuring the workflow e-mail alert (we will discuss more about workflow in *Chapter 6, Automating a Business Process*). The following is an example of the e-mail address:

```
from: Apiuss <admin@appiuss.com>
to: "rakeshistom@icloud.com" <rakeshistom@icloud.com>
```

To configure an Organization-Wide Default Address for your organization, follow these instructions:

1. Navigate to **Setup | Administer | Email Administration | Organization-Wide Email Addresses**.
2. Click on **Add**.

The screenshot displays the Salesforce interface for configuring Organization-Wide Email Addresses. On the left, the navigation pane shows 'Administer' with 'Email Administration' checked, and 'Organization-Wide Addresses' selected. The main content area features the title 'Organization-Wide Email Addresses', a description: 'An organization-wide email address associates a single email address to a user profile and email address.', and a table with one row titled 'Organization-Wide Email Addresses' and an 'Add' button highlighted with a red box. Below the table, it states 'No email addresses defined.'

3. It will redirect you to the **Edit Organization-Wide Email Addresses** page, where you have to fill in all the required details in order to create the address.

Edit Organization-Wide Email Addresses

An organization-wide email address associates a single email address to a user profile. Each user in the profile can

Save Save and New Cancel

Organization-Wide Email Address

Display Name Appiuss

Email Address admin@appiuss.com

Allow All Profiles to Use this From Address

Allow Only Selected Profiles to Use the From Address

Profiles

- System Administrator
- Standard User
- Read Only
- Solution Manager
- Marketing User
- Contract Manager
- Standard Platform User
- Customer Portal User
- Customer Portal Manager
- Content Only User

Save Save and New Cancel

The descriptions of the fields are as follows:

- **Display Name:** This is the word or phrase that the users who receive your e-mail will see as the sender of the e-mail.
 - **Email Address:** This is the e-mail address that is used when sending an outbound e-mail.
 - **Profiles:** You can also select profiles that can use the selected e-mail address.
4. Once you click on **Save**, Salesforce will send an e-mail to the address specified in the **Email address** mentioned in last steps.

- You have to open the e-mail and verify the e-mail address by clicking on the confirmation link, and then the user will be allowed to use this Organization-Wide Address. Once the e-mail address is confirmed by the user, you will see it verified under the status column:

Organization-Wide Email Addresses					
An organization-wide email address associates a single email address to a user profile. Each user in the profile can send email using this address. Users will share the same display name and email address.					
Organization-Wide Email Addresses					Add
Actions	Display Name	Email Address	Allowed Profiles	Status	Created Date
Edit Del	Appiuss	admin@appiuss.com	All Profiles	Verified	3/1/2014



You cannot use an Organization-Wide address to send a mass e-mail or a Stay-in-Touch request. You cannot delete or change an organization-wide e-mail address if it is used by an e-mail alert.

Compliance BCC Email

Outbound e-mail is very important for any organization for security and compliance purposes. In Salesforce, you can easily enable the **Compliance BCC Email** feature to automatically send a secret copy of each outbound e-mail message to an e-mail address that you specify.

To configure the **Compliance BCC Email** feature for your organization, follow these steps:

- Navigate to **Setup | Administer | Email Administration | Compliance BCC Email**.
- Select **Enable** and specify the e-mail address, as shown in the following screenshot:

The screenshot shows the 'Compliance BCC Email' configuration page. On the left, the navigation menu includes 'Administer', 'Email Administration', and 'Compliance BCC Email'. The main content area has the title 'Compliance BCC Email' and a subtitle 'Set up a compliance BCC email to automatically copy each outgoing email to a compliance email address.' Below this, there is a section for 'Compliance BCC Email' with an 'Enable' checkbox that is checked. A text input field labeled 'Compliance BCC Email' contains the address 'admin@appiuss.com'. At the bottom right, there are 'Save' and 'Cancel' buttons.

- Click on **Save**.

This feature excludes e-mails like system e-mails, such as password reset or import completion notifications.



Compliance BCC Email prevents users from editing the **BCC** field on any e-mail and disables their **Automatic BCC** setting under **My Email Settings**.

Test Deliverability

Salesforce sends an e-mail from 52 different IP addresses. If your organization blocks any of these IP addresses, you might not receive all the e-mails sent from Salesforce. Salesforce.com maintains distinct IP addresses for inbound and outbound e-mail.

To check whether your organization can receive e-mails from every Salesforce IP address, follow these instructions:

1. Navigate to **Setup | Administer | Email Administration | Test Deliverability**.
2. Enter your e-mail address.
3. Click on **Send**. Salesforce instantly sends a test message from all 52 IP addresses to your e-mail address. Each test message specifies the IP address from which it was sent.



If you are using e-mail relay, you will just receive e-mails from five IP addresses. You have to whitelist these IP addresses.



If you received fewer than 52 test messages, contact your e-mail administrator. The organization's e-mail administrator must whitelist the Salesforce IP ranges on your organization's e-mail server. The Salesforce IP ranges are as follows:

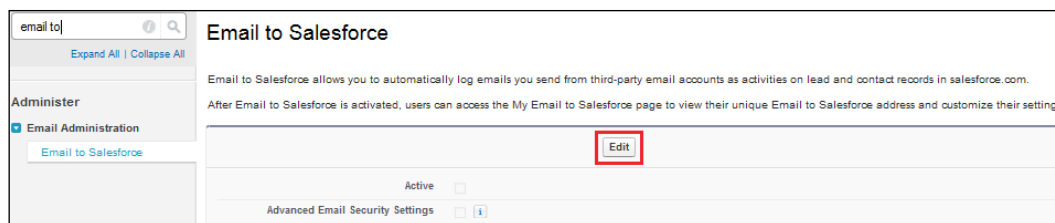
96.43.144.64 to 96.43.144.65
 96.43.148.64 to 96.43.148.65
 182.50.78.64 to 182.50.78.79
 204.14.232.64 to 204.14.232.79
 204.14.234.64 to 204.14.234.79

Email to Salesforce

If you want to keep a record of each e-mail sent from your company provided e-mail addresses to the leads, contacts, opportunities, and other records, you can use the **Email to Salesforce** feature. This feature enables you to keep a copy of each e-mail sent from your third-party e-mail provided by your company. You simply need to send an e-mail with Bcc to the Salesforce organization's specific e-mail address. If the e-mail address in the **to** section of your mail matches the e-mail address of the lead, contacts, and opportunities, Salesforce will create a task with the corresponding record and it will be shown under the activity history of the record. Alternatively, you can keep this as an unresolved item and later assign it to some other user.

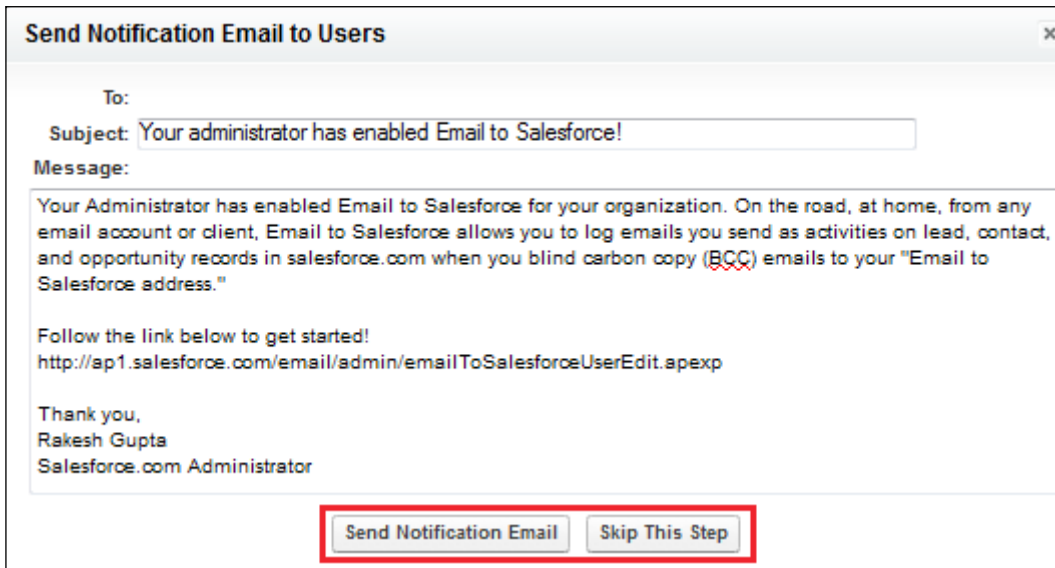
If you want to enable this feature for your organization, follow these steps:

1. Navigate to **Setup | Administer | Email Administration | Email to Salesforce**.
2. On the **Email to Salesforce** screen, click on **Edit**.



3. Select the **Active** checkbox. Also, you can select the **Advanced Email Security Settings** checkbox to configure **Email to Salesforce** to verify the legitimacy of the sending server before processing a message.

4. Click on **Save**.
5. Now, Salesforce will ask you to send a notification to all users mentioning that the administrator has enabled **Email to Salesforce**, and it will include a link to get started with an e-mail setup for individual users. Click on **Send Notification** or **Skip This Step**.



Send Notification Email to Users ×

To:

Subject: Your administrator has enabled Email to Salesforce!

Message:

Your Administrator has enabled Email to Salesforce for your organization. On the road, at home, from any email account or client, Email to Salesforce allows you to log emails you send as activities on lead, contact, and opportunity records in salesforce.com when you blind carbon copy (BCC) emails to your "Email to Salesforce address."

Follow the link below to get started!
<http://ap1.salesforce.com/email/admin/emailToSalesforceUserEdit.apexp>

Thank you,
Rakesh Gupta
Salesforce.com Administrator

Setting up the Email to Salesforce URL

Each user has to set up the **Email to Salesforce** URL for their own use. Now Salesforce generates a user-specific **Email to Salesforce** e-mail address that is to be used to send e-mails as Bcc by the user.

To configure **Email to Salesforce**, follow these steps:

1. Navigate to **Name | My Settings | Email | My Email to Salesforce**.
2. Now, you will be able to see **Your Email to Salesforce addresses** in the highlighted part of the page.
3. You can set the e-mail addresses that you will use to send e-mails on behalf of the **Email to Salesforce** address in the **My Acceptable Email Addresses** field, separated by commas. Only the e-mails sent from an e-mail address you specify under the **Email to Salesforce** address will be added to the activity's history of related records; an unauthorized sender error will be bounced back if not.

My Email to Salesforce

If you use a company-provided or third-party email address, use Email to Salesforce to save emails as activities on lead, contact, opportunity, and other records in salesforce.com.

1. Send your email from an email address specified in My Acceptable Email Addresses.
2. Blind carbon copy (BCC) the "Email to Salesforce address" when you send an email that you want added to the activity history of a salesforce.com record.

Your Email to Salesforce address: sfemailtosalesforce@34d4bxahj8128n50rj780oq4udquyb85bm10xdydlqvg2l9-nqyheav.ap1.le.salesforce.com

My Email to Salesforce

Enter the Email to Salesforce address in the BCC line of emails that you want to add to the activity history of related records. This is an automatically generated email address.

Email to Salesforce Address: sfemailtosalesforce@34d4bxahj8128n50rj780oq4udquyb85bm10xdydlqvg2l9-nqyheav.ap1.le.salesforce.com

My Acceptable Email Addresses

Enter all email addresses that you use to email leads and contacts, separated by commas. Only emails sent from an email address you specify below can be added to the activity history of related records.

My Acceptable Email Addresses:

4. Additionally, you can decide what you want to do with the e-mails that are sent to Salesforce. By default, it is set to **Automatically assign them to related salesforce.com records**. You can also select the **Always save email attachments** and **Email me confirmation of association** checkbox as shown in the following screenshot:

Email Associations

When emails are sent to salesforce.com:

Always send them to [My Unresolved Items](#) New!

Automatically assign them to related salesforce.com records

Opportunities

Leads

Contacts

If duplicate records are found, associate email with:

All records

The oldest record

The record with the most activity

If no matching records are found, create a task for each recipient and send it to [My Unresolved Items](#)

Always save email attachments

Email me confirmation of association

Enter the email domains you don't want to associate, separated by commas.

Excluded Domains:

[Add my domain \(icloud.com\) to the list of excluded domains.](#)

5. Click on **Save**.

Next time if you send an e-mail from the third-party e-mail client to an e-mail address specified on lead, contact, or opportunity, it will be listed down under **Activity History**:

Activity History					
Action	Subject	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Email: Email to Salesforce	✓	3/1/2014	Rakesh Gupta	3/1/2014 8:53 PM

You will also get a confirmation e-mail from Salesforce with a link where the e-mail is attached under a list related to **Activity History**.

Deleting attachments sent as links

Salesforce provides a way to find and delete attachments sent as links. Receivers who subsequently click on the attachment link will see a message asking them to contact the e-mail sender to view the attachment. Let's start with an example: Sara Barallies asks the administrator Sagar Pareek to delete all the attachments that were sent as links to customers when the user Rakesh Gupta sent e-mails in bulk.

To do this, you can follow these instructions:

1. Navigate to **Setup | Administer | Email Administration | Delete Attachments Sent as Links**.
2. You have to enter the following details:
 - **Attachment Filename** (including the file extension if you remember it)
 - **Sender's Username**
 - **Start Date**
 - **End Date**

delete attachments | ? | 🔍

Expand All | Collapse All

Administer

- Email Administration
 - Delete Attachments Sent as Links**

Delete Attachments Sent as Links

Need to stop email recipients downloading attachments sent, for example, using mass email?

Find and delete email attachments sent as links:

Search by:

Attachment Filename:

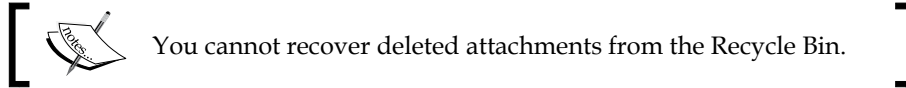
Sender's Username:

Start Date: [3/1/2014 9:08 PM]

End Date: [3/1/2014 9:08 PM]

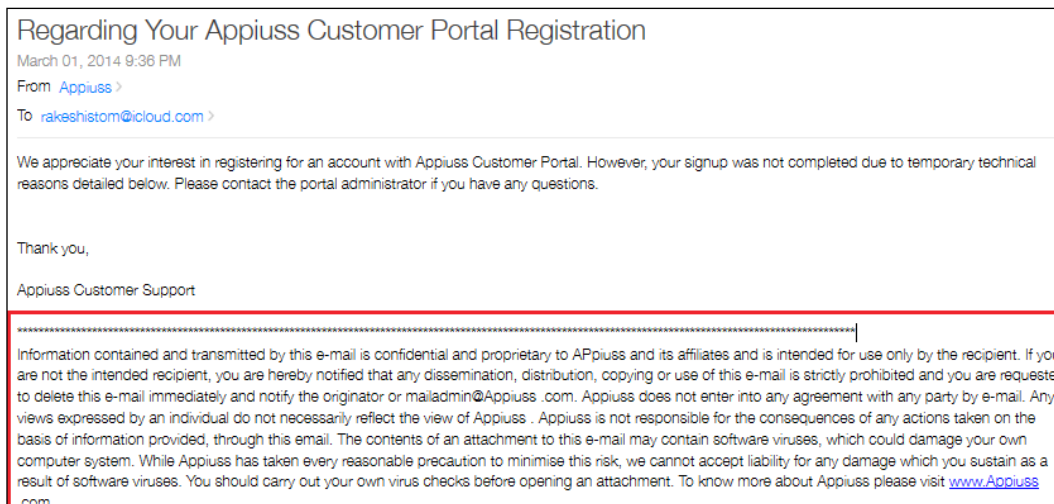
Search by URL:

3. Click on **Search**.
4. In the search result, click on **Del** in front of the corresponding attachment to delete it.



Email Footers

Email Footers are a great way to add disclaimers or to show some personal information or for branding purposes. Now, you can add footers to e-mails sent from Salesforce.com. A disclaimer appears at the bottom of all the outgoing e-mail messages sent from Salesforce or the API, as shown in the following screenshot. The defaults are used when no footer matches an outgoing e-mail's encoding.



To define footers for your organization, follow these instructions:

1. Navigate to **Setup | Administer | Email Administration | Email Footers**.
2. Click on **New** to set a footer.

Organization-Wide Email Footers

Add footers to emails sent from Salesforce.com. Create default footers—one for single emails and one for mass emails—or create one for each character encoding (General US & Western Europe, match the outgoing email's character encoding.)

New Save

Default Footers

Default for Single Mail None

Default for Mass Mail None

All Footers

Actions	Name	Single	Mass	Created Date
---------	------	--------	------	--------------

New Save

3. Provide the appropriate **Name** to the footer.
4. Select the **Active for single email** checkbox. Also, remember to select **Active for mass email** if you want the footer to be available for single e-mails, mass e-mails, or both. Select **Unicode UTF-8** in the **Email encoding** field.
5. In the **Text of the Footer** field, write the text you want to show with the footer itself.

Organization-Wide Email Footer

The footer's email encoding determines which emails use the footer. Email footers are text only; HTML tags aren't rendered. Maximum

Save Cancel

Organization-Wide Email Footer

Name Appiuss

Active for single email

Active for mass email

Email encoding Unicode (UTF-8)

Text of footer

Information contained and transmitted by this e-mail is confidential and proprietary to Appiuss and its affiliates and is intended for use only by the recipient. If you are not the intended recipient, you are hereby notified that any dissemination, distribution, copying or use of this e-mail is strictly prohibited and you are requested to delete this e-mail immediately and notify the originator or mailadmin@Appiuss.com. Appiuss does not enter into any agreement with any party by e-mail. Any views expressed by an individual do not necessarily reflect the view of Appiuss. Appiuss is not responsible for the consequences of any actions taken on the basis of information provided, through this email. The contents of an attachment to this e-mail may contain software viruses, which could damage your own computer system. While Appiuss has taken every reasonable precaution to minimize this risk, we cannot accept liability for any damage which you sustain as a result of software viruses. You should carry out your own virus checks before opening an attachment. To know more about Appiuss please visit www.Appiuss.com.

Save Cancel

6. Click on **Save**.

Organization-Wide Email Footers

Add footers to emails sent from Salesforce.com. Create default footers—one for single emails and one for mass emails—or create one for each character encoding (General US & Western footers match the outgoing email's character encoding).

New Save

Default Footers


Default for Single Mail: Appius ▾ Default for Mass Mail: Appius ▾

All Footers

Actions	Name	Single	Mass	Created Date
Unicode (UTF-8)				
Edit Del	Appius	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3/1/2014

New Save

7. The defaults are used when no footer matches an outgoing e-mail's encoding. Now, you have to select the default footer for single and mass e-mail and click on **Save**.

[ Footers are text only; HTML tags are not rendered. The maximum size is 32 KB.]

Google Apps settings

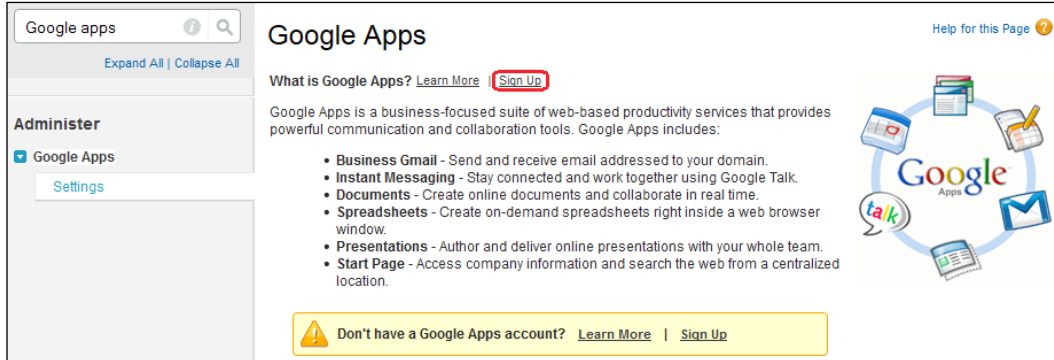
Google Apps is a suite of on-demand communication and collaboration services hosted by Google and designed for business users. If your organization has a Google Apps account, Salesforce administrators can enable Google Docs, Gmail, and a host of Google-related AppExchange apps that are customized for use within Salesforce. Your organization can use this feature to save file space in Salesforce and a few other purposes. The following are the steps to configure the Google Apps settings for your organization:

- Creating a Google Apps account
- Configuring Google Apps domain settings
- Activating Google Apps services
- Adding Google Docs to Salesforce

Creating a Google Apps Account

To create a Google Apps account for your organization, follow these steps:

1. Navigate to **Setup | Administer | Google Apps | Settings**.
2. Click on **Sign Up** and follow the instructions.



Configuring Google Apps domain settings

To configure Google Apps domain settings for your organization, follow these steps:

1. Navigate to **Setup | Administer | Google Apps | Settings**.
2. Click on **Edit**.

A screenshot of the 'Configure Google Apps Domain' dialog box. It has a title bar with 'Configure Google Apps Domain' and 'Save' and 'Cancel' buttons. The main area contains two input fields: 'Google Apps Administrative Contact' with the value 'Rakesh Gupta' and 'Google Apps Domain' with the value 'Appiuss.com'. There are search and info icons next to the first field and a placeholder text 'For example: mycompany.com' next to the second field. At the bottom, there are 'Save' and 'Cancel' buttons.

3. Select the **Google Apps Administrative Contact**. This person is the point of contact for Google Apps users in your organization.
4. Enter **Google Apps Domain** that you registered with Google. In our case, it is Appiuss.com.
5. Click on **Save**.

Activating Google Apps Services

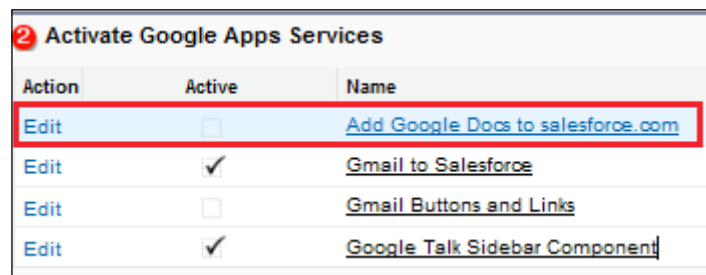
You can activate various Google Apps Services for your organization by performing the following steps:

1. Navigate to **Setup | Administer | Google Apps | Settings**.
2. Locate the Google Apps services that you want to activate.
3. Click on **Edit** to activate a service.

Adding Google Docs to Salesforce

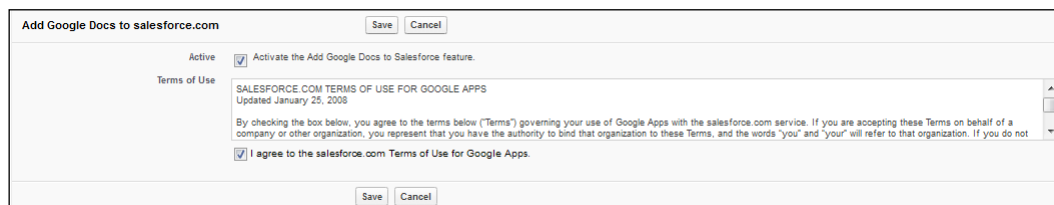
After the activation of this service, you can directly attach documents from your Google Docs, and they will be saved to your Salesforce space. To activate the **Add Google Docs to Salesforce** feature, perform the following steps:

1. Navigate to **Setup | Administer | Google Apps | Settings**.
2. Click on the **Edit** link next to the **Add Google Docs to Salesforce** option in the **Activate Google Apps Services** list:



Action	Active	Name
Edit	<input type="checkbox"/>	Add Google Docs to salesforce.com
Edit	<input checked="" type="checkbox"/>	Gmail to Salesforce
Edit	<input type="checkbox"/>	Gmail Buttons and Links
Edit	<input checked="" type="checkbox"/>	Google Talk Sidebar Component

3. Select **Activate** and **I agree to the Salesforce.com Terms of Use for Google Apps** to enable the service.



Add Google Docs to salesforce.com Save Cancel

Active Activate the Add Google Docs to Salesforce feature.

Terms of Use

SALESFORCE.COM TERMS OF USE FOR GOOGLE APPS
Updated January 25, 2008

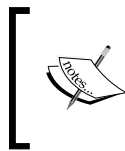
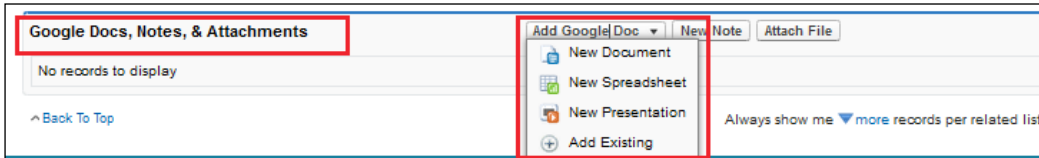
By checking the box below, you agree to the terms below ("Terms") governing your use of Google Apps with the salesforce.com service. If you are accepting these Terms on behalf of a company or other organization, you represent that you have the authority to bind that organization to these Terms, and the words "you" and "your" will refer to that organization. If you do not

I agree to the salesforce.com Terms of Use for Google Apps.

Save Cancel

4. Click on **Save**.

Now if you navigate to any records details page, you can find a link related to **Google Docs, Notes & Attachments**. You can now attach a file from Google Docs by clicking on the **Add Google Docs** button, as shown in the following screenshot:



Google Talk within Salesforce is no longer available. To learn more about Google Apps settings, you can go to https://help.salesforce.com/HTViewHelpDoc?id=google_setup_getstart.htm&language=en_US.

Summary

In this chapter, we saw different ways of customizing the e-mail administration in Salesforce – starting from configuring My Domain to customizing the Salesforce login page. We also discussed how to set **Email Footers** and **Compliance BCC**, and how to enable the Email to Salesforce feature. Finally, we also discussed organization-wide default e-mail addresses and Google Apps settings.

In the next chapter, we will discuss Sales Cloud and Service Cloud in detail with the creation of custom objects, tabs, and apps.

5

CRM Functions and Streamlining Business Requirements

In the previous chapter, we discussed various concepts of security and settings in Salesforce. We spoke about Organization-Wide Defaults, sharing settings, and Field-Level Security. We also discussed two-factor authentication, network access, and many other concepts related to security. In this chapter, we will talk about domain settings and ways to customize the login page. We will also discuss various concepts related to e-mail administration in Salesforce. We'll cover the following topics in this chapter:

- Types of relationships in Salesforce
- Sales Cloud overview
- Service Cloud overview
- Streamlining a business process
- Setting the history-tracking option

Type of relationships in Salesforce

You can develop relationships between objects in Salesforce. You can also associate one object with another. For example, if you have an object named `Event` (to store information about an event) and you want to associate it with the `Event Registration` object (to store information about participants for a particular event) so that you can associate the event registration records with the respective event records, as you want to categorize each registration with the respective event. Salesforce provides the following five types of relationships that can be established between the objects:

- A master-detail relationship
- A lookup relationship
- A many-to-many relationship (junction object)
- Self-relationship
- A hierarchical relationship

A master-detail relationship

A master-detail relationship is a tightly-coupled relationship between Salesforce objects; this means that if a master record is deleted, then the child records associated with it are also deleted. In this type of relationship, the master controls the behavior of the child record in terms of visibility and sharing. It means the security setting of the master object applies to the child object.

For example, in our application (which we will discuss in the later part of this chapter), we have `Sponsor` that can register several booths in the event organized by Appiuss. For this requirement, we will use two objects: `Sponsor` and `Booth Registration`. So, in this case, `Sponsor` will act as the master object and `Booth Registration` as the child object.

When there is a master-detail relationship between two objects, you can create a special type of field over the master object called the Roll-up Summary field that we will discuss in a later section.

Lookup relationships

It is a loosely-coupled relationship between Salesforce objects, which means that even if the parent record is deleted, child records will remain in the system. Here, the parent and child both have their own setting through which they share information called security control.


The difference between master-detail and lookup relationships

Let's have a look at the differences between the lookup and master-detail relationships in the following table:

A lookup relationship	A master-detail relationship
Loosely-coupled relationship.	Tightly-coupled relationship.
Roll-up Summary field cannot be created.	Roll-up Summary field can be created.
A parent record is not required while creating a child record.	A parent record is always required in order to create a child record.
A child record can have as many lookup relationships as possible.	A child record can only have a maximum of two master-detail relationships.
Lookup fields are not required on the page layout of the detail record.	Master-detail field is always required on the page layout of the detail record.
Standard object record can be on the detailed side of a custom object record.	A standard object record cannot be on the detailed side of a custom object record.
The record ownership of child records is not controlled by the parent.	The parent controls the record ownership of child records. The owner field is not available in the detail record of a master-detail relationship. Queues, sharing rules, and manual sharing is not possible for detail records as they require the owner field.
You can have a child record without a parent.	You cannot have a child record without a parent.
You can have a maximum of 25 lookups on an object.	You can have a maximum of two master detail records on an object.
The cascade delete feature is not available.	The cascade delete feature is available.

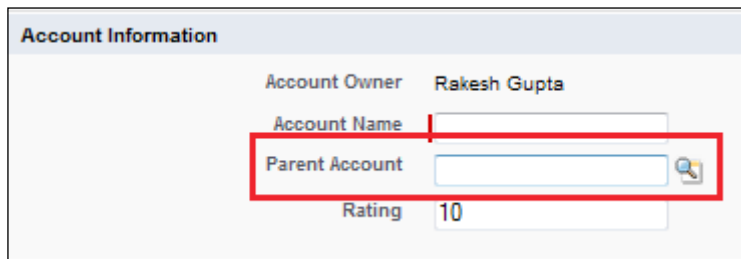
Many-to-many relationship

We can create a many-to-many relationship in Salesforce if we need child records to have two masters that can control its behavior. For example, a solution is attached to many cases, and one case may have more than one solution. We use a many-to-many relationship in Salesforce to relate two objects. If you have two objects called `Faculty` and `Course` and you want to relate these two objects with the third called `College`, you can use the many-to-many relationship. In this case, you have to create two master-detail relationships: `College - Faculty` and `College - Course`.

[ One object can have only two master-detail relationships.]

Self-relationship

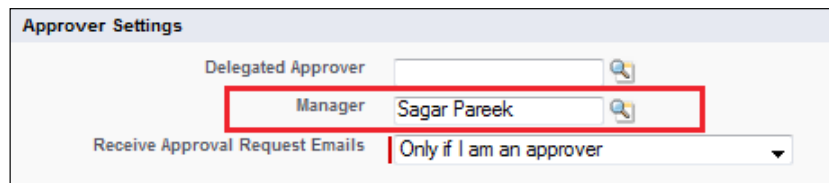
Self-relationship is another example of a lookup relationship. In Salesforce, we can use the lookup relationship to create a self-relationship between objects. We can have a maximum of 25 self-lookups. For example, an account record has a parent account record, as shown in the following screenshot:



The screenshot shows the 'Account Information' form in Salesforce. The 'Account Owner' field is populated with 'Rakesh Gupta'. The 'Account Name' field is empty. The 'Parent Account' field is highlighted with a red box and contains a search icon, indicating a self-lookup relationship. The 'Rating' field is populated with '10'.

Hierarchal relationship

In Salesforce, only the user object has a hierarchal relationship where we can create a hierarchy of the users in the organization. For example, a user can have his or her manager, his or her manager can have a senior manager, and so on, until the user reaches the CEO or CIO level. The best example is the **Manager** field of the user object, as shown in the following screenshot:



The screenshot shows the 'Approver Settings' form in Salesforce. The 'Delegated Approver' field is empty. The 'Manager' field is highlighted with a red box and contains the name 'Sagar Pareek' and a search icon. The 'Receive Approval Request Emails' dropdown menu is set to 'Only if I am an approver'.

Sales Cloud overview

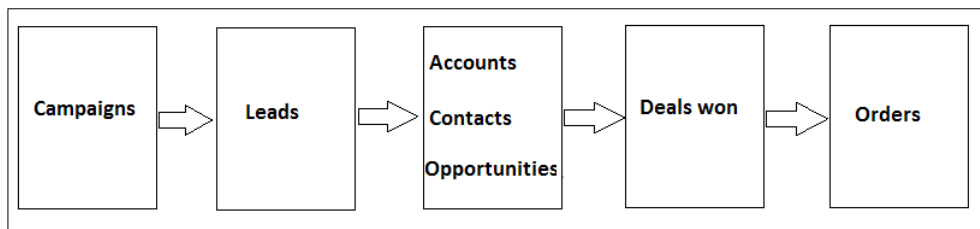
Sales Cloud is a product designed to automate your sales process. By implementing this, an organization can boost their sales process. It includes campaign, lead, account, contact, opportunity (deal), product, quotes, Chatter, report, dashboard, and many other features as well. Sales Cloud includes everything that you need to close a deal faster.

Sales Cloud can support your business purposes if you are looking for a solution to provide basic lead management, contact management, and activity tracking. Using this, you can also maintain a strong sales pipeline, quoting, and contract management on cloud. The productivity achieved by implementing the Sales Cloud solution allows your sales team to focus on identifying and bringing in more business. Your sales team will work more competently, while your marketing executives are provided with the actual information to make more informed and quicker business decisions.

With Sales Cloud, your inside sales, marketing, sales rep, and management teams work together in an organized manner to win new deals, develop new relationships with customers, and retain existing customers. A few benefits of using Sales Cloud are as follows:

- A 360-degree view of the customer
- More effective lead management and tracking
- Ability to pipeline the management process
- Standardized quoting and pricing capability
- Quicker access to information related to customers and opportunities
- Ability to streamline and automate business processes using the workflow rule and approval processes
- Reports and dashboard to present a summary of data in front of management employees

The sales cycle starts from **Campaigns** and ends with **Opportunities**. Through campaigns, the organization gets leads; once leads are ready to buy your products, you can convert those leads into accounts, contacts, and opportunities. Once you win those opportunities, the next step is to deliver the order; this is called order management. The following diagram shows the sales life cycle in Salesforce:



Now let's discuss the following points:

- Campaign management
- Lead management
- Account management
- Contact management
- Opportunity management
- Order management

Campaign management

A campaign is an outbound marketing plan that you want to capture, manage, and track within Salesforce. You can run a campaign through a direct mail program, seminar, print advertisement, e-mail, or other type of marketing initiatives. A campaign is a way to generate leads. In Salesforce, you can also associate leads with a certain campaign, and it can be tracked in future to see how successful the marketing effort was. To create, edit, delete, and configure an advanced campaign setup in Salesforce, the **Marketing User** checkbox on the user's personal information page needs to be selected. To check yours, follow these steps:

1. Navigate to **Name | My Settings | Personal | Advanced user details | Edit**.
2. Select **Marketing User** as shown in the following screenshot:

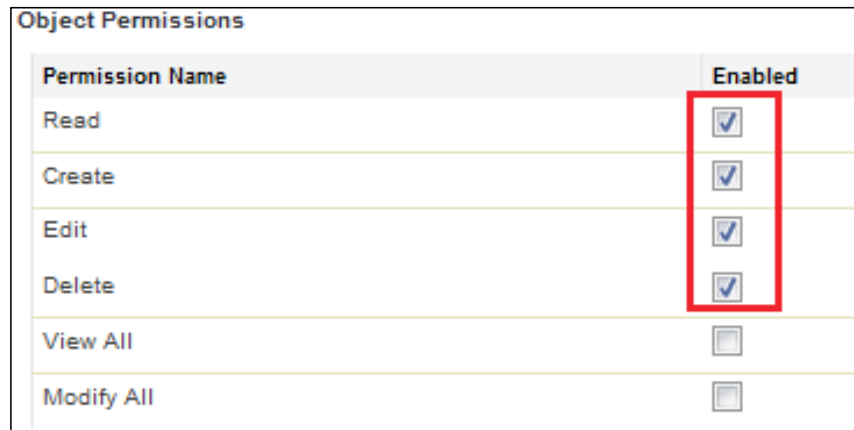
The screenshot shows the 'Advanced User Details' page for 'Rakesh Gupta'. The page is titled 'User Edit' and has 'Save' and 'Cancel' buttons. Below the title is the 'General Information' section. The fields are as follows:

First Name	Rakesh	Role	<None Specified>
Last Name	Gupta	User License	Salesforce
Alias	RGupt	Profile	System Administrator
Email	rakeshistom@cloud.cor	Active	✓
Username	rakeshistom@7demo.cc	Marketing User	<input checked="" type="checkbox"/>

3. Click on **Save**.

Setting up the campaign access

By default, all the users have read access to campaigns (if you created your profile by cloning the read-only profile). To create, edit, or delete campaigns, users need to have the **Create**, **Edit**, or **Delete** permissions enabled on their profile, as shown in the following screenshot:



The screenshot shows a table titled "Object Permissions" with two columns: "Permission Name" and "Enabled". The "Enabled" column contains checkboxes for each permission. A red box highlights the checkboxes for Read, Create, Edit, and Delete, all of which are checked. View All and Modify All are unchecked.

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Campaigns – standard fields

Whenever you create a new campaign in Salesforce, your sales and marketing teams should work together to capture all the relevant information related to the customer. Salesforce, by default, comes with a standard field for campaign and campaign member objects, or if your business needs custom fields, you can create those as well in the system.

The following table shows the important standard fields that are available in the campaign object:

Field label	Data type	Description
Active	Checkbox	This field is used to make the campaign either active or inactive. If the campaign is inactive, it will not appear when the user clicks on the campaign lookup available on the lead, contact, and opportunity edit page and reports as well.

Field label	Data type	Description
Actual Cost	Currency (18, 0)	This field is used to capture the amount that you actually spent to run the campaign. This field must be captured to calculate the ROI. The ROI formula is $((Total\ value\ won\ opportunities - actual\ cost) / actual\ cost) * 100$
Budget Cost	Currency (18, 0)	This field is used to capture the amount of money that has been budgeted for the campaign.
Campaign Name	Text (80)	This is the name of the campaign. A user can enter a relevant name that marketing and sales team members can easily understand, for example, Packt's 2000th title.
Description	Long text area (32,000)	This field is used to capture detailed information about the campaign.
Expected Response (%)	Percent (8, 2)	This field is used to capture the expected response rate for the campaign.
Expected Revenue	Currency (18, 0)	This field is used to capture the expected revenue from the campaign.
Start Date	Date	This field is used to capture the date when a campaign starts.
End Date	Date	This field is used capture the date when a campaign ends.
Num Sent	Number (18, 0)	This field is used to capture the number of target audience/ individuals to whom you will send invites to for this campaign.

Field label	Data type	Description
Type	Picklist	<p>This field is used to capture the type of campaign you are going to run. The picklist values available for this field are as follows:</p> <ul style="list-style-type: none"> • Advertisement • E-mail • Telemarketing • Banner ads • Seminar/conference • Public relations • Public relations • Referral program • Others
Status	Picklist	<p>This field is used to capture the current status of a campaign. The picklist values available in this field are as follows:</p> <ul style="list-style-type: none"> • In progress • Completed • Aborted • Planned
Total Responses	Number (9, 0)	<p>This field shows the sum of all the campaign members (lead and contact that you added to the campaign as campaign members) who are linked to this campaign and have had their member status set to responded.</p>
Converted Leads	Number (9, 0)	<p>This field shows the number of leads that you successfully converted.</p>

Field label	Data type	Description
Num Total Opportunity	Number (9, 0)	This field shows the total number of opportunities that you would get from running a campaign.
Num Won Opportunity	Number (9, 0)	This field shows the total number of opportunities that you would win.
Total Value Opportunity	Currency (18, 0)	This field shows the value of the total amount of opportunities linked to this campaign.
Total Value Won Opportunity	Currency (18, 0)	This field shows the value of the total amount of closed-won opportunities linked to this campaign.

You can find a complete list of standard and custom fields for campaigns by following the path **Setup | Build | Customize | Campaigns | Fields**.

At any time, you can add or delete custom fields for a campaign, but you cannot delete standard fields. You can also add a value to the standard picklist and change the Field-Level Security of fields as well.

Campaign members – standard fields

Once you create a campaign, the next step is to add members to the campaign, like you add contacts or leads. The following table shows the important standard fields that are available in the campaign member's object:

Field label	Data type	Description
Campaign	Lookup (campaign)	This field is used to link campaigns and campaign members.
Contact	Lookup (contact)	This is just a contact name that is used to select the contact in the campaign members. It will then establish a link with the contact name.
Lead	Lookup (lead)	This is just the lead name that is used to select the lead in the campaign members. It will then establish a link with the lead name.

Field label	Data type	Description
Status	Picklist	This field is used to capture the status of a campaign member for the associated campaign. The values available under this Picklist are as follows: <ul style="list-style-type: none"> • Responded • Sent

You can find a complete list of standard and custom fields for campaign members by following the path **Setup | Build | Customize | Campaign Members | Fields**, as shown in the following screenshot:

Campaign Member Fields

This page allows you to specify the fields that can appear on the Campaign Member page. You can create up to 500 Campaign Member custom fields.

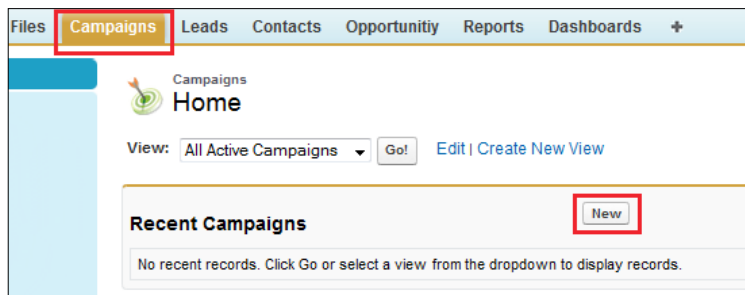
Note that deleting a custom field will delete any filters that use the custom field. It may also change the result of Assignment or Escalation Rules that rely on the custom field data.

Campaign Member Standard Fields			
Action	Field Label	Field Name	Data Type
Edit	Campaign	Campaign	Lookup(Campaign)
Edit	City	City	Text(40)
Edit	Company (Account)	CompanyOrAccount	Text(255)
Edit	Contact	Contact	Lookup(Contact)
Edit	Country	Country	Text(80)
	Created By	CreatedBy	Lookup(User)
	Created Date	CreatedDate	Date/Time
Edit	Description	Description	Text(255)
Edit	Do Not Call	DoNotCall	Checkbox
Edit	Email	Email	Email
Edit	Email Opt Out	HasOptedOutOfEmail	Checkbox
Edit	Fax	Fax	Fax
Edit	Fax Opt Out	HasOptedOutOfFax	Checkbox
Edit	First Name	FirstName	Text(40)
Edit	First Responded Date	FirstRespondedDate	Date
	Last Modified By	LastModifiedBy	Lookup(User)
	Last Modified Date	LastModifiedDate	Date/Time
Edit	Last Name	LastName	Text(40)
Edit	Lead	Lead	Lookup(Lead)
Replace Edit	Lead Source	LeadSource	Picklist
Edit	Mobile	MobilePhone	Phone
Edit	Phone	Phone	Phone
Edit	Responded	HasResponded	Checkbox
Replace Edit	Salutation	Salutation	Picklist
Edit	State/Province	State	Text(40)
Replace Edit	Status	Status	Picklist
Edit	Street	Street	Text(255)
Edit	Title	Title	Text(80)
Edit	Zip/Postal Code	PostalCode	Text(20)

Creating a new campaign

You can create a new campaign in Salesforce using the user interface; alternatively, you can import it from another organization using the import wizard and data loader. Here, we will discuss ways to create a campaign via the Salesforce user interface. To create a campaign, follow these steps:

1. Go to the **Campaigns** tab and click on the **New** button that is available on the top of the page, as shown in the following screenshot:



2. Fill out all the information in the **Campaign Edit** page. Any field that has a red line next to the box indicates that it is required.
3. Select the **Active** checkbox for any new campaign that is going to be used. This will allow users to view your Salesforce campaign. You can always go back to uncheck the box when your campaign is no longer active:

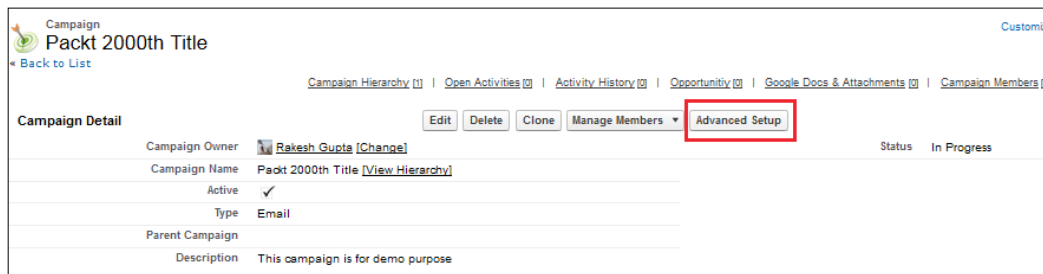
Campaign Information	
Campaign Owner	Rakesh Gupta
Campaign Name	tckt pub 2000th book title
Active	<input checked="" type="checkbox"/>
Type	Email
Parent Campaign	
Description	This campaign is for demo purpose

Planning	
Start Date	3/18/2014 [3/21/2014]
End Date	4/3/2014 [3/21/2014]
Num Sent	120
Expected Response (%)	40.00
Expected Revenue	10000
Budgeted Cost	100
Actual Cost	120

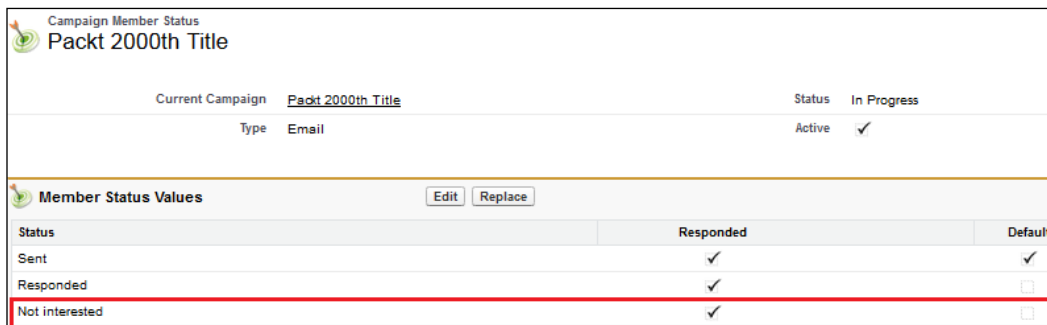
4. Once done, click on **Save**.

Adding values in member status

Once you have created a campaign, the next task is to add the campaign members. Before you proceed, we will learn how to add a value to the **Campaign Member Status** picklist for a specific campaign. By default, a new campaign member had two status values: **Sent** and **Responded**. These are shown in the **Campaign Member Status** picklist. To add/remove the status values of a particular campaign from the **Campaign Detail** page, click on the **Advanced Setup** button as shown in the following screenshot:



It will redirect you to the **Campaign Member Status** page. From here, you can add or remove values from the status picklist for a particular record as shown in the following screenshot:



Now, we have added the value **Not interested** to the picklist.

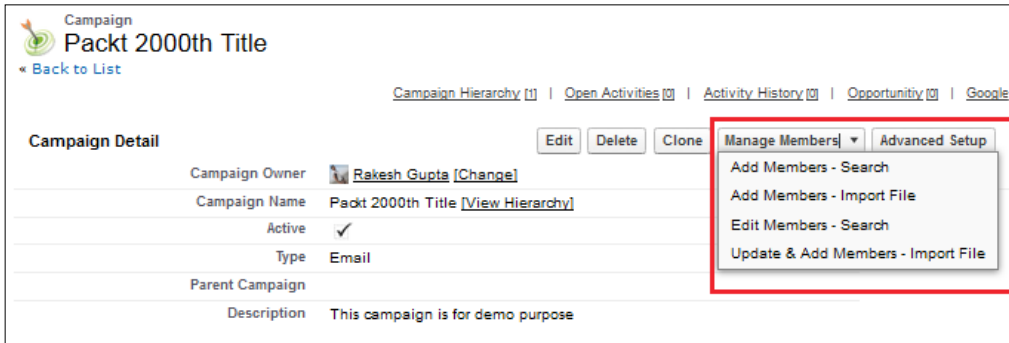


You can have more than one responded value. These are calculated together and displayed under the **Total Responses** field.

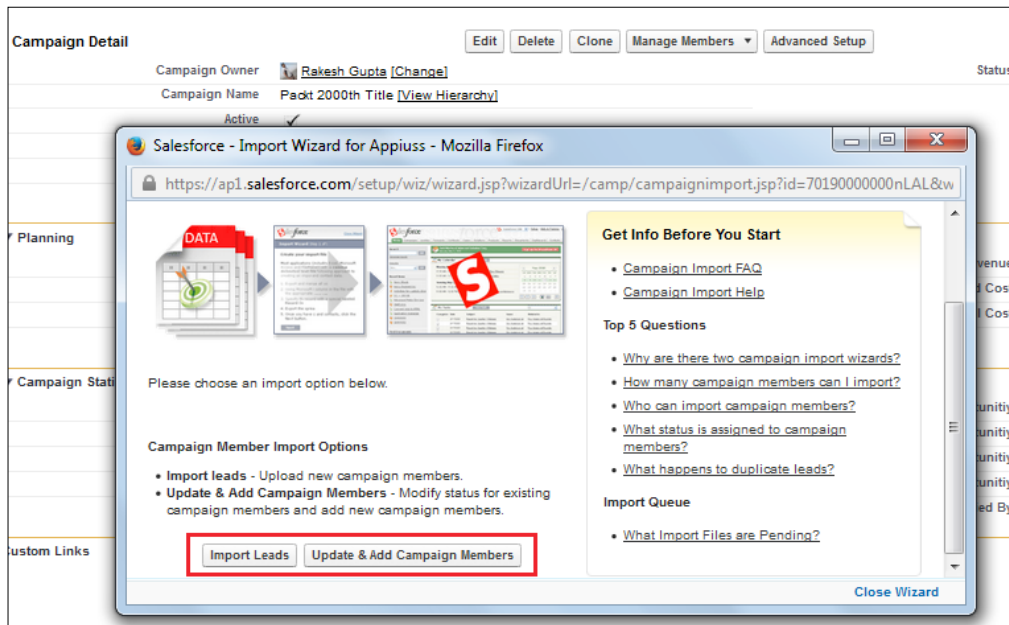
Adding campaign members

To add multiple members to your campaign, perform the following steps:

1. Click on the **Manage Members** drop-down button and select one of the possible options shown in the following screenshot:



2. You can add existing contacts or leads by selecting **Add Members - Search** from the **Manage Members** drop-down button.
3. If you want to add members by importing a file into Salesforce, then click on **Add Members - Import File** from the **Manage Members** drop-down button. It will pop up a new window where you can import leads and contacts:



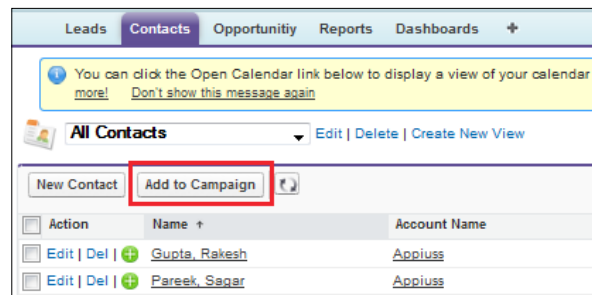
The following are the two options available on the campaign page:

- **Lead Import Wizard:** This option allows you to import up to 50,000 leads at one time
- **Campaign Update Wizard:** This option allows you to update up to 50,000 existing contacts and leads at one time

You can also add members to your campaign by navigating to the campaign member list available on the campaign detail page.

Adding members from the lead or contact list view

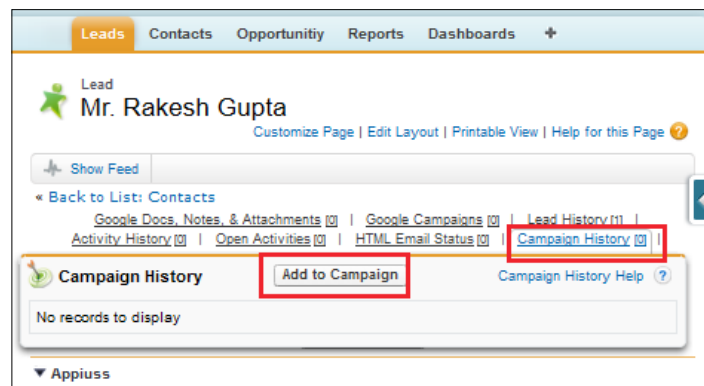
You can add multiple members to a campaign from the lead and contact list view by clicking on the **Add to Campaign** button, as shown in the following screenshot:



You can add a maximum of 250 leads or contacts per page.

Adding members from the lead or contact detail pages

You can also add members to a campaign via the contact or lead detail pages. To do this, navigate to the **Campaign History** list available on the **Lead** detail page and click on the **Add to Campaign** button, as shown in the following screenshot:



You can also use the Apex data loader to add multiple members to the campaign. We will discuss the data loader in *Chapter 7, Concepts of Data Management*.

Lead management

A lead represents a prospect that is interested in buying your product; it is in the form of a potential opportunity or someone who is interested in doing business with your organization. Salesforce provides a way to capture leads from various sources, and you can easily access leads through any device such as your mobile, iPad, and workstation. Let's discuss the following topics:

- Leads – standard fields
- Lead business process
- Lead settings
- Creating new leads
- Autoresponse rules
- Assignment rules
- Accepting records from the lead queue
- Lead conversion

Leads – standard fields

The marketing team is responsible for capturing all the relevant information related to leads and then pass it to the sales team. Salesforce, by default, provides standard fields for a lead object, or if your business needs custom fields, you can create those as well for the lead object.

The following table shows the important standard fields that are available in the lead object:

Field label	Data type	Description
Lead Owner	Lookup (User, Queue)	As discussed in <i>Chapter 2, User Management and Organization Administration</i> , the owner of a record should be a user or queue for lead, case, and custom objects. In this field, you select a user or queue to whom you want to assign this lead.

Field label	Data type	Description
Last Name	Text (80)	This field is used to capture the last name and is a required field. The last name is copied in the Last Name field of a contact record during the lead conversion process.
Company Name	Text (255)	This field is used to capture the company name and is a required field. The company name is copied to the company name of an account record during the lead conversion process. Note that once a person's account is enabled for an organization, this field is no longer required for the lead.
Lead Status	Picklist	This field is used to capture the status of a lead and is a required field. The values available under this picklist are as follows: <ul style="list-style-type: none"> • Contacted • Open • Qualified • Unqualified
Source	Picklist	This field is used to capture the source of the lead, such as an e-mail, phone, and newspaper. The values available under this picklist are as follows: <ul style="list-style-type: none"> • Advertisement • Employee referral • External referral • Partner • Public relations • Seminar - Internal • Seminar - Partner • Trade show • Web • Word of mouth • Others

You can find a complete list of the standard and custom fields for leads by following the path **Setup | Build | Customize | Leads | Fields**, as shown in the following screenshot:

Lead Fields

This page allows you to specify the fields that can appear on the Lead page. You can create up to 500 Lead custom fields.

Note that deleting a custom field will delete any filters that use the custom field. It may also change the result of Assignment or Escalation Rule

Lead Standard Fields			
Action	Field Label	Field Name	Data Type
	Address	Address	Address
Edit	Annual Revenue	AnnualRevenue	Currency(18, 0)
Edit	Campaign	Campaign	Lookup(Campaign)
Edit	Company	Company	Text(255)
	Created By	CreatedBy	Lookup(User)
Edit	Data.com Key	Jigsaw	Text(20)
Edit	Description	Description	Long Text Area(32000)
Edit	Do Not Call	DoNotCall	Checkbox
Edit	Email	Email	Email
Edit	Email Opt Out	HasOptedOutOfEmail	Checkbox
Edit	Fax	Fax	Fax
Edit	Fax Opt Out	HasOptedOutOfFax	Checkbox
Replace Edit	Industry	Industry	Picklist
	Last Modified By	LastModifiedBy	Lookup(User)
Edit	Last Transfer Date	LastTransferDate	Date
Edit	Lead Owner	Owner	Lookup(User,Queue)
Replace Edit	Lead Source	LeadSource	Picklist
Replace Edit	Lead Status	Status	Picklist
Edit	Mobile	MobilePhone	Phone
	Name	Name	Name
Edit Replace	Salutation	Picklist	
	First Name	Text(40)	
	Last Name	Text(80)	
Edit	No. of Employees	NumberOfEmployees	Number(8, 0)
Edit	Phone	Phone	Phone
Replace Edit	Rating	Rating	Picklist
Edit	Title	Title	Text(128)
Edit	Website	Website	URL(255)

Lead business process

You can use various business processes to display different picklist values for users based on their profile. Multiple business processes allow you to track separate lead life cycles. You can create different lead processes that comprise some or all of the picklist values available for the **Lead Status** field. To create/modify a lead process, follow the path **Setup | Build | Customize | Leads | Lead Processes | New**, as shown in the following screenshot:

Now, you can assign the picklist values of the lead's status, as shown in the following screenshot:

Lead settings

To enable the Web-to-Lead feature for your organization, you have to configure the lead setting by navigating to **Setup | Build | Customize | Leads Settings | Edit**, as shown in the following screenshot:

Edit Lead Settings

Use the lead settings below to specify default lead behavior for your organization.

Lead Queue Settings

The queue or user that will own a lead when assignment rules fail to locate an owner:

- when a lead is saved with the auto-assign checkbox selected
- when a lead is captured online

User

Notify Default Lead Owner

Lead Conversion Settings

Enforce Validation and Triggers from Lead Convert

Do Not Change Lead Status Values to New Owner's Record Type on Lead Conversion

You can select the default lead owner. This will work only when the assignment rule (which we will discuss later in the chapter) fails. You can also select the **Notify Default Lead Owner** checkbox too. Salesforce gives you the option to deselect the **Enforce Validation and Trigger From Lead Conversion** checkbox, and by default, this checkbox is selected.

Creating new leads

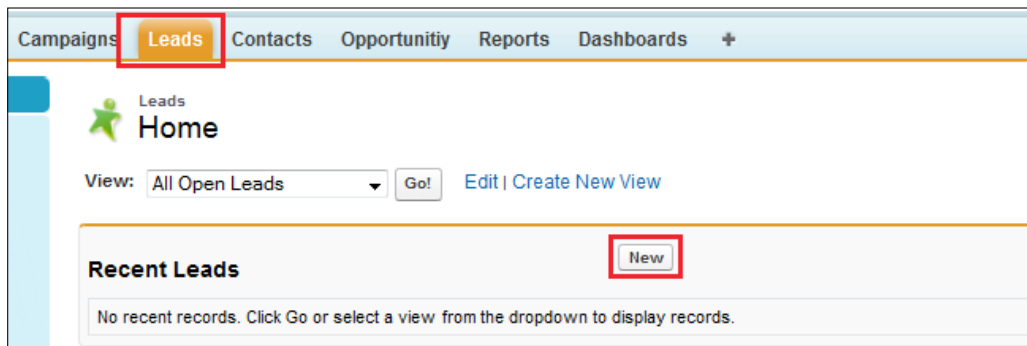
In Salesforce, you can capture a lead from various sources:

- The Salesforce user interface
- Web-to-Lead
- Data loader (we discussed this in *Chapter 2, User Management and Organization Administration*)

Creating a new lead through the user interface

To create a new lead through the Salesforce user interface, follow these steps:

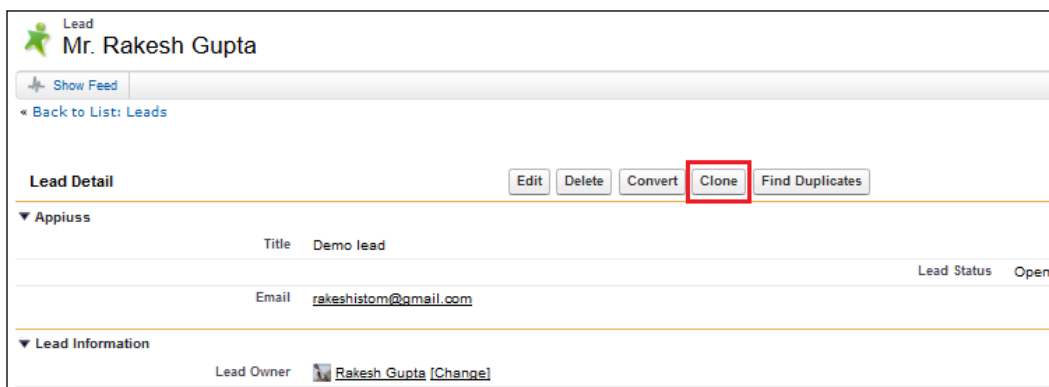
1. Go to the **Leads** tab and click on the **New** button that is available at the top of the page, as shown in the following screenshot:



2. Fill out all of the information on the leads' edit page. Any field that has a red line before the box indicates that it is a required field.
3. You can also select the campaign you want to relate this lead to.
4. Once done, click on **Save**.

[ Once you enable a person's account, the **Company** field of the lead's record is no longer a required field.]

To clone a lead, click on the **Clone** button available on the **Lead Detail** page, as shown in the following screenshot:

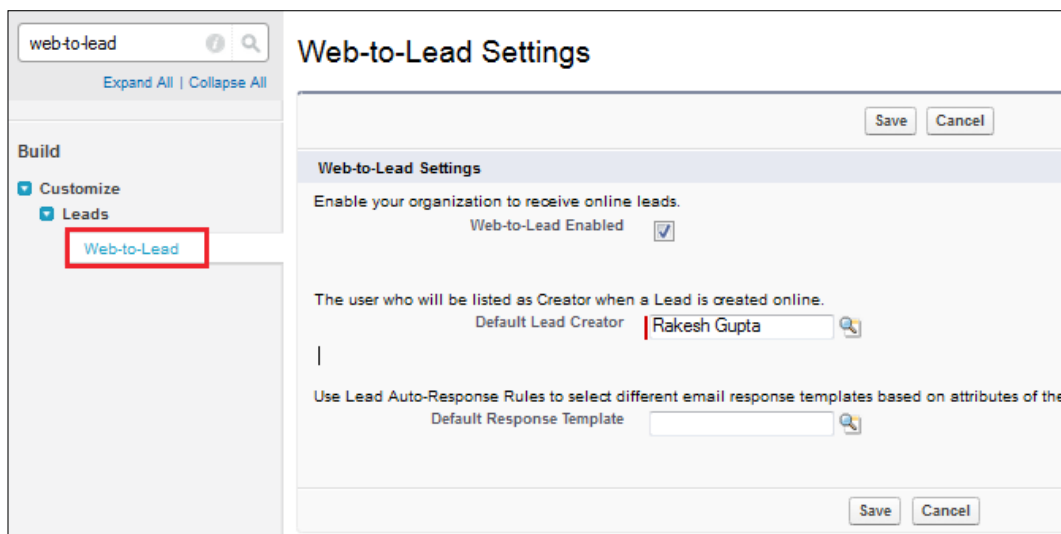


Creating a new lead through Web-to-Lead

Web-to-Lead does nothing but captures a lead from the company's website. You have to host a web form (a simple HTML file) on your website, and whenever the form is filled in, its record is automatically created in Salesforce. It's a very easy way to capture a lead and get it in Salesforce without any integration.

Web-to-Lead settings

To enable/disable Web-to-Lead, navigate to **Setup | Build | Customize | Web-to-Lead | Edit**; Salesforce will display a **Web-to-Lead Settings** page as shown in the following screenshot:

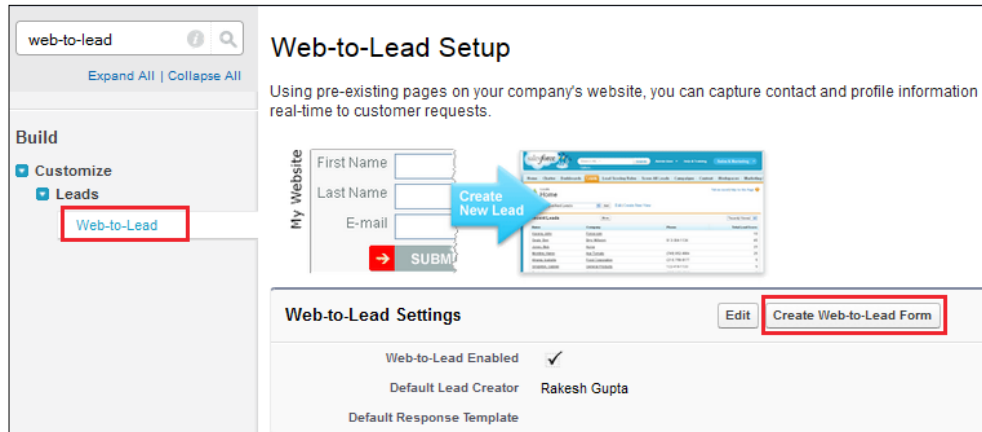


Select the **Web-to-Lead Enabled** checkbox to enable Web-to-Lead. Now, select **Default Lead Creator**. This is the user who will be the default lead owner of the lead when it is captured via a web form. Also, select **Default Response Template**. A better option is to create Web-to-Lead autoresponse rules (which we are going to discuss in the later part of this chapter) to determine which e-mails to send to prospects when they submit the information online. Finally, click on **Save**.

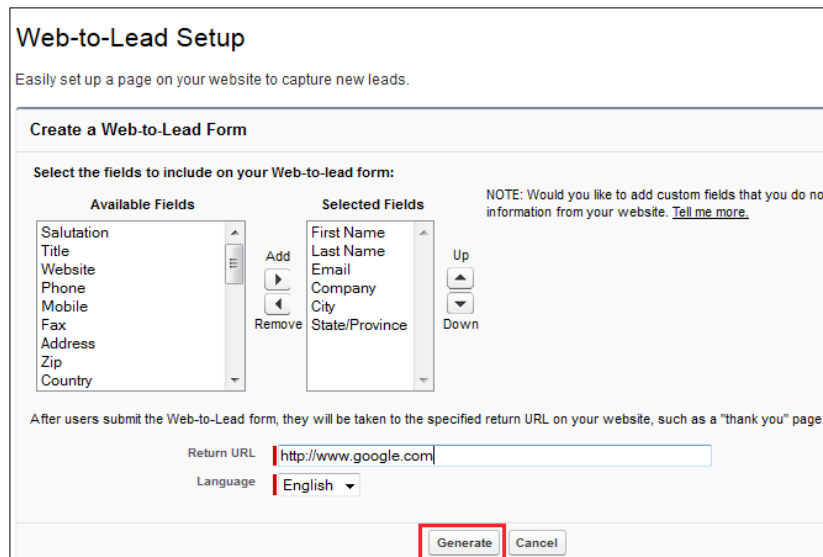
Generating a Web-to-Lead HTML code

To create a Web-to-Lead form, follow these steps:

1. Navigate to **Setup | Build | Customize | Leads | Web-to-Lead**:



2. Click on the **Create Web-to-Lead Form** button. It will redirect you to a new page where you will have to select a field that you want to display on the Web-to-Lead form. Enter the return URL (the user will be redirected to this URL as soon as he or she submits the Web-to-Lead page on your company's website) and select the same language as the one that appears in the following screenshot:



3. Once done, click on the **Generate** button. It will give you some sample code in an HTML format; copy this code and use it as your company's **Contact Us** page or wherever you want.
4. Finally, click on the **Finished** button to finish the Web-to-Lead setup.

With the Web-to-Lead feature, you can capture up to 500 leads per day.



By paying an additional cost, you can increase this limit; however, for that, you will have to create a case and contact the Salesforce customer support.

Auto-response rules

An auto-response rule is a way by which you can send a thank you message or a lead registration confirmation e-mail if an individual uses Web-to-Lead to show interest in your business. Auto-response rules work only in the case of Web-to-Lead, and only one auto-response rule can be active at a time; however, you can create a maximum of 50 auto-response rules based on your Salesforce edition. To create an auto-response rule, follow these steps:

1. Navigate to **Setup | Build | Customize | Leads | Auto-Response Rules | New**.
2. Enter data in the **Rule Name** field and activate it by selecting the **Set this as the active Web-to-Lead Auto-Response rule** checkbox as shown in the following screenshot:

New Web-to-Lead Auto-Response Rule

Enter the name of the rule and click Save. Checking the active box will deactivate the Web-to-Lead Auto-Response rule that is currently active.

Enter the Rule Name

Save Cancel

Rule Name Appiuss

Set this as the active Web-to-Lead Auto-Response rule.

Save Cancel

3. Click on **Save**.

Defining the auto-response rule entries

To define rule entries for the auto-response rule, follow these steps:

1. Go to the auto-response rule detail page that we defined in the previous section, navigate to the **Rule Entries** list, and click on **New** as shown in the following screenshot:

Web-to-Lead Auto-Response Rule
Appiuss [Help for this Page](#)

Click New to create a rule entry that includes the conditions a lead must meet and the email template to use. Click Reorder to change the order your entries will be processed.

Rule Detail [Edit](#)

Rule Name	Appiuss	Active	<input type="checkbox"/>
Created By	Rakesh Gupta, 3/22/2014 8:22 PM	Modified By	Rakesh Gupta, 8/6/2014 1:02 AM

[Edit](#)

Rule Entries [New](#)

No rule entries specified.

We recommend you create multiple rule entries under this rule. It is typically not necessary to create more than one rule. However, you may need to create an additional rule if you are importing leads and you choose to route them based on another criteria.

2. It will redirect you to the **Rule Entries** edit page where you need to enter a few details as follows:
 - **Sort Order:** This is where you enter the number to specify the order in which rule entries will fire
 - **Select the criteria for this rule entry:** This is where you enter the criteria for which this rule entry will fire
 - **Name:** This is where you enter the sender's name
 - **Email Address:** This is where you enter the sender's e-mail address
 - **Email Template:** This is where you select the e-mail template
3. Click on **Save**.
4. Finally, it will look like the following screenshot:

Web-to-Lead Auto-Response Rule
Appiuss

Click New to create a rule entry that includes the conditions a lead must meet and the email template to use. Click Reorder to change the order your entries will be processed.

Rule Detail [Edit](#)

Rule Name	Appiuss	Active	<input checked="" type="checkbox"/>
Created By	Rakesh Gupta, 3/22/2014 8:22 PM	Modified By	Rakesh Gupta, 3/22/2014 8:34 PM

[Edit](#)

Rule Entries [New](#) [Reorder](#)

Action	Order	Criteria	Sent From (Email)	Template
Edit Del	1	Lead: City CONTAINS Mumbai	Appiuss (info@appiuss.com)	Sales: New Customer Email



All e-mails count against the organization daily limit of 1,000 mass e-mails.

Assignment rules

It is a common problem to assign leads to local sales teams. Salesforce provides you with a feature called assignment rule. By using it, you can autoassign a lead to the respective user/queue as per your business requirements. Only one assignment rule can be active at a time. The assignment rule works for both Web-to-Lead and leads created through the Salesforce UI. To define an assignment rule, follow these steps:

1. Navigate to **Setup | Build | Customize | Leads | Assignment Rules | New**.
2. Enter data in the **Rule Name** field and activate it by selecting the **Set this as the active lead assignment rule** checkbox, as shown in the following screenshot:

New Lead Assignment Rule

Enter the name of the rule, and select the active checkbox to use this rule for automatic lead assignment. Active Assignment Rules.

Enter the Rule Name

Save Cancel

Rule Name Appiuss assignment rule

Set this as the active lead assignment rule.

Save Cancel

3. Click on **Save**.

Defining assignment rule entries

To define rule entries for an assignment rule, follow these steps:

1. Go to the autoresponse rule detail page that we defined in the last step (under the assignment rules section), navigate to the **Rule Entries** list, and click on **New** as shown in the following screenshot:

Lead Assignment Rule [Help for this Page](#) ?

Appiuss assignment rule

Create the rule entries to automatically assign leads to users or queues based on the criteria specified in the rule entries. You can reorder the entries from this page after creating them.

Rule Detail [Edit](#)

Rule Name	Appiuss assignment rule	Active	<input checked="" type="checkbox"/>
Created By	Rakesh Gupta , 3/22/2014 8:48 PM	Modified By	Rakesh Gupta , 8/6/2014 1:03 AM

[Edit](#)

Rule Entries [New](#)

No rule entries specified.

We recommend you create multiple rule entries under this rule. It is typically not necessary to create more than one rule. However, you may need to create an additional rule if you are importing leads and you choose to route them based on another criteria.

2. It will redirect you to the **Rule Entries** edit page where you have to enter a few details as follows:
 - **Sort Order:** This is where you enter the number to specify the order in which rule entries will fire
 - **Select the criteria for this rule entry:** This is where you enter the criteria for which this rule entry will fire
 - **Select the user or queue to assign the lead to:** This is where you select the user or queue as per your requirement
 - **Email Template:** This is where you select the e-mail template
3. Click on **Save**.
4. Finally, it will look like the following screenshot:

Lead Assignment Rule [Help for this Page](#) ?

Appiuss assignment rule

Create the rule entries to automatically assign leads to users or queues based on the criteria specified in the rule entries. You can reorder the entries from this page after creating them.

Rule Detail [Edit](#)

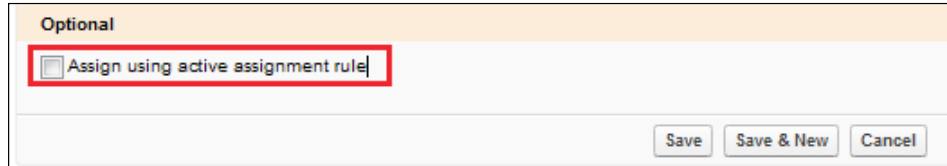
Rule Name	Appiuss assignment rule	Active	<input checked="" type="checkbox"/>
Created By	Rakesh Gupta , 3/22/2014 8:48 PM	Modified By	Rakesh Gupta , 8/6/2014 1:05 AM

[Edit](#)

Rule Entries [New](#) [Reorder](#)

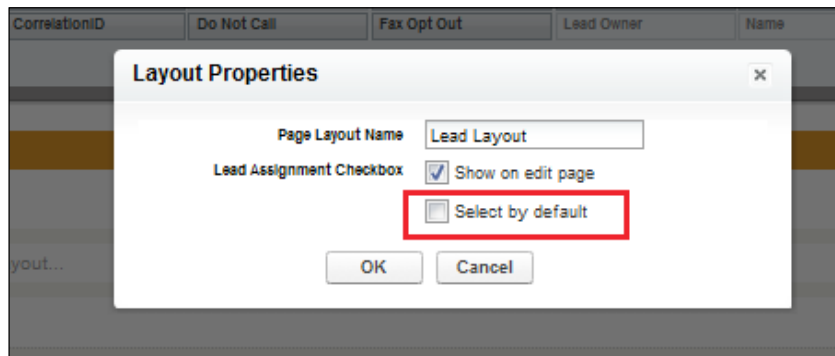
Action	Order	Criteria	Assign To	Email
Edit Del	<input type="text" value="1"/>	Lead: City CONTAINS Mumbai	Appiuss	<input checked="" type="checkbox"/>

If you create a lead using the Salesforce user interface and you want to assign the lead using an active assignment rule, then you will have to select the **Assign using active assignment rule** checkbox available on the lead edit page, as shown in the following screenshot:



However, the problem is that you have to select this checkbox every time. To overcome this, Salesforce gives you a way to do this, in which you can select this checkbox for a specific page layout. To do this, follow these steps:

1. Navigate to **Setup | Build | Customize | Leads | Page Layouts**.
2. Click on the **Edit** link in front of the page layout for which you want to select the **Assign using active assignment rule** checkbox by default.
3. Click on **Layout Properties**, and it will pop up a window as shown in the following screenshot:



4. Click on the **Select by default** checkbox available under **Lead Assignment Checkbox**.
5. Click on **OK** and then click on **Save**.

Next time if you create a new or edit an old lead, the **Assign using active assignment rule** checkbox is automatically selected.

Accepting records from the lead queue

Once leads are assigned to a queue, any users from the queue can take ownership of the record by accepting it. Leads remain in the queue until they are assigned or accepted by users. To create a new list view, follow these steps:

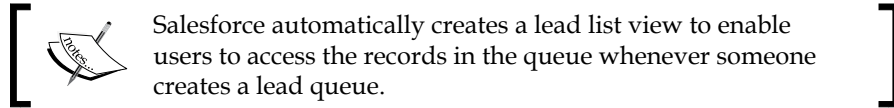
- Go to the **Lead** tab, click on **Create new view**, and enter the following details:
 - View Name:** This refers to the name that you want to appear in the **View** drop-down list
 - View Unique Name:** This refers to a unique name to be used by the API and managed packages
 - Specify Filter Criteria:** This is the filter criteria that you can specify by selecting the queue from the drop-down list
 - Select Fields to Display:** This is used to choose up to 15 different fields to display in your view
 - Restrict Visibility:** This is used to select the visibility of the view as per the requirement, and you can specify whether everyone or just you can see the custom view

The following screenshot shows the edit page of the list view:

- Click on **Save**.

Action	Name	Company	State/Province	Email	Lead Status	Created Date
Edit Del	Gupta, Rakesh	Appiuss		rakeshistom@gmail.com	Open	3/21/2014

Now you can accept a lead from the queue by using the **Accept** button in the **Appiuss** list view that we created in the last step, as shown in the preceding screenshot.

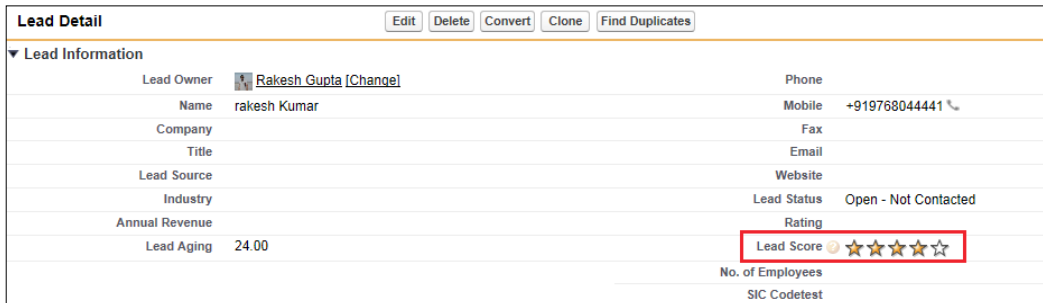




Lead conversion

Once a lead is captured in the system, the next step is to convert it. If your organization is creating a thousand leads, then it is a very monotonous job to qualify them and then convert those leads one by one. This is why many organizations use the lead score concept to qualify the leads.

Lead scoring

Lead scoring is nothing but a mechanism to calculate the weightage of the lead based on certain fields. For example, if the lead belongs to a certain city, then you can assign a value between 1-10. If the annual income crosses a threshold value, you can assign a value for this between 1-10. Finally, you can calculate the overall value of the lead. If it's greater than eight, then convert it; otherwise, let it be in the system. It's a required concept of the formula field and we will discuss it in *Chapter 6, Automating a Business Process*. The lead information page will look like the following screenshot:



Lead Detail		Edit	Delete	Convert	Clone	Find Duplicates
▼ Lead Information						
Lead Owner	 Rakesh Gupta [Change]	Phone				
Name	rakesh Kumar	Mobile	+919768044441			
Company		Fax				
Title		Email				
Lead Source		Website				
Industry		Lead Status	Open - Not Contacted			
Annual Revenue		Rating				
Lead Aging	24.00	Lead Score				
		No. of Employees				
		SIC Codetest				

Lead conversion – mapping lead fields

Standard fields between the lead and contact and account and opportunity objects are automapped by Salesforce for lead conversion. If you want to leverage this functionality for custom fields, then you have to use the map lead fields feature available in the lead object.

To do this, follow these steps:

1. Navigate to **Setup | Build | Customize | Leads**.
2. Go to the **Lead Custom Fields & Relationships** list and click on the **Map Lead Fields** button as shown in the following screenshot:

Lead Custom Fields & Relationships				
Action	Field Label	API Name	Installed Package	Data Type
Edit	Correlation Data	SFGA__Correlation_Data__c	Salesforce for Google AdWords	Long Text Area(32000)
Edit	CorrelationID	SFGA__CorrelationID__c	Salesforce for Google AdWords	Text(255)
Edit	Web Source	SFGA__Web_Source__c	Salesforce for Google AdWords	Text(255)

3. In the next window, you will be able to map the fields, and it will look like the following screenshot:

Lead Custom Field Mapping

Map each of your organization's lead custom fields to one of your custom account, contact, or opportunity fields. These mappings will be used when you convert leads.

Lead Custom Field Mapping	
Take this lead custom field...	...and map it to this field
Correlation Data	None Available
CorrelationID	--None--
Web Source	--None--

[Save](#) [Cancel](#)

4. Once done, click on **Save**.
5. Mapping is required if you create some custom fields required for the account, contact, or opportunity objects. Once done, it will populate the value on those fields (account, contact, or opportunity) at the time of lead conversion.



While mapping the fields, make sure that you map the fields with the correct data type and that it also fulfills the validation rule if any exists in the account, contact, or opportunity.

Converting the leads

Upon lead conversion, it will create an account, contact, and optionally, an opportunity. An opportunity is created by lead conversion of the default value in the required field. The opportunity close date is set to the last day of the current quarter and opportunity stage is set to first value of stage picklist. During lead conversion, the amount field in the opportunity field remains blank.

To convert a lead, click on the **Convert** button available on the **Lead Detail** page:

The screenshot shows the 'Lead Detail' page for a lead named 'Appius'. At the top, there are several action buttons: 'Edit', 'Delete', 'Convert', 'Clone', 'Sharing', and 'Find Duplicates'. The 'Convert' button is highlighted with a red box. Below the buttons, the lead's details are displayed in a table-like format. The 'Appius' section shows 'Title: Mr' and 'Email: abc@demo.com'. The 'Lead Status' is 'Open'. The 'Lead Information' section shows 'Lead Owner: Rakesh Gupta [Change]', 'Name: Demo', and 'Company: Lead'.

This will redirect you to a new page where you can change the record owner of the new records. You can select the checkbox to send an e-mail notification to the owner. If you don't want to create an opportunity after the lead conversion, then select the **Do not create a new opportunity upon conversion** checkbox as shown in the following screenshot. You can also set the converted lead status and specify values for a new task subject, due date, and comment that you will assign to the record owner:

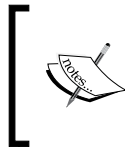
The screenshot shows the 'Convert Lead' dialog box. At the top, there are 'Convert' and 'Cancel' buttons. The dialog is divided into several sections. The 'Convert Lead' section includes: 'Record Owner' (Rakesh Gupta), 'Send Email to the Owner' (checkbox), 'Account Name' (--None--), 'Opportunity Name' (Lead), and 'Converted Status' (Qualified). The 'Task Information' section includes: 'Subject' (empty), 'Due Date' (8/6/2014), 'Type' (--None--), and 'Comments' (empty text area). The 'Additional Information' section includes: 'Status' (Not Started), 'Priority' (Normal), and 'Send Notification Email' (checkbox). The 'Reminder' section includes: 'Reminder' (checkbox checked), '8/6/2014', and '8:00 AM'.

Before creating any new records, Salesforce tries to match the existing account names with the company name of the lead. Where there is a match, you will have the option to select the existing records, as shown in the following screenshot:

As soon as you click on the **Convert** button, the lead conversion process will be completed, and you will be redirected to a new account page along with the following developments:

- The company name of the lead will become the account name
- The lead's first and last names will become the contact name
- The contact and opportunity associated will become related to the account
- Any campaign related to the lead will now be associated with the opportunity

Once you convert the lead, you will have no access to that lead. The only way to view a converted record is create a lead report, and under the filter option, select **converted equal to true**.



If a person account is enabled for your organization, then the company name of the lead will no longer be a required field. If the lead with an empty company name is converted, it will create a person account (not business account and contact).

Account management

An account in Salesforce represents the customer, competitor, or partner with whom you are doing your business. There are two types of accounts in Salesforce:

- **Business account (B2B):** This account is enabled for every Salesforce organization. In this type of account, you can store information related to the company. It's also called a business-to-business (B2B) account.
- **Person account (B2C):** If your company sells an insurance scheme to an individual, then you can use this type of account. To enable this account, you have to raise a case with Salesforce, and they will enable this feature for you.

Accounts – standard fields

Both business and person accounts offer the same features and fields, but there are certain field differences, such as the one found in a person account: the **Reports To**, **Parent Account**, or **Account Hierarchy** fields are not available. A person account counts against both account and contact.

The following table shows the important standard fields that are available in the account object:

Field label	Data type	Description
Account name	Name	This field is used to capture the account name. It's just the company name for whom you are creating an account in the system. Here, you should always use a meaningful full name that everyone in the organization can easily understand.
Type	Picklist	Here, you have to select the type of account, such as whether it's a partner, investor, competitor, reseller, prospect, or customer type of account.
Website	URL (255)	This field is used to capture the company's website URL.
Industry	Picklist	This picklist states the industry in which the account belongs.
Annual revenue	Currency (18, 0)	This field is used to capture the annual revenue of the company.
Billing address	Address	This field is used to capture the company's billing address.
Shipping address	Address	This field is used to capture the company's shipping address.
Employees	Number (8, 0)	This field is used to capture the number of employees in the organization.

You can find a complete list of standard and custom fields for accounts by following the path **Setup | Build | Customize | Accounts | Fields**, as shown in the following screenshot:

Account Fields

This page allows you to specify the fields that can appear on the Account page. You can create up to 500 Account custom fields.

Note that deleting a custom field will delete any filters that use the custom field. It may also change the result of Assignment or Escalation Rules that rely on the

[Set History Tracking](#)

Account Standard Fields			
Action	Field Label	Field Name	Data Type
	Account Name	Name	Name
Edit	Account Number	AccountNumber	Text(40)
Edit	Account Owner	Owner	Lookup(User)
Edit	Account Record Type	RecordType	Record Type
Edit	Account Site	Site	Text(80)
Replace Edit	Account Source	AccountSource	Picklist
Edit	Annual Revenue	AnnualRevenue	Currency(18, 0)
	Billing Address	BillingAddress	Address
	Created By	CreatedBy	Lookup(User)
Edit	Customer Portal Account	IsCustomerPortal	Checkbox
Edit	Data.com Key	Jigsaw	Text(20)
Edit	Description	Description	Long Text Area(32000)
Edit	Employees	NumberOfEmployees	Number(8, 0)
Edit	Fax	Fax	Fax
Replace Edit	Industry	Industry	Picklist
	Last Modified By	LastModifiedBy	Lookup(User)
Replace Edit	Ownership	Ownership	Picklist
Edit	Parent Account	Parent	Lookup(Account)
Edit	Phone	Phone	Phone
Replace Edit	Rating	Rating	Picklist
	Shipping Address	ShippingAddress	Address
Edit	SIC Code	Sic	Text(20)
Edit	SIC Description	SicDesc	Text(80)
Edit	Ticker Symbol	TickerSymbol	Content(20)
Replace Edit	Type	Type	Picklist
Edit	Website	Website	URL(255)

Creating a new account

You can create accounts in Salesforce using its user interface, or you can import it from another organization using the import wizard and data loader. Here, we will discuss ways to create an account from the Salesforce user interface. To create an account, follow these steps:

1. Go to the **Accounts** tab and click on the **New** button that is available at the top of the page.
2. Fill in all the required information, as shown in the following screenshot:

The screenshot shows the 'Account Edit' form in Salesforce. The form is divided into two main sections: 'Account Information' and 'Additional Information'. The 'Account Information' section includes fields for Account Owner (Rakesh Gupta), Account Name (Packt Publishing), Parent Account, Rating (10), Phone, Fax, Contractor, and Website (www.packtpub.com). The 'Additional Information' section includes fields for Type (Other), Industry (Education), Employees, Annual Revenue, Description, Billing Street (Livery Place, 35 Livery Street), Billing City (Birmingham), Billing State/Province (West Midlands), Billing Zip/Postal Code, Billing Country (UK), Shipping Street (Livery Place, 35 Livery Street), Shipping City (Birmingham), Shipping State/Province (West Midlands), Shipping Zip/Postal Code, and Shipping Country (UK). There are also 'Save', 'Save & New', and 'Cancel' buttons at the bottom of the form.

3. Click on **Save**.

Contact management

Contact management is a way to maintain the key-decision maker or individual contact information of an account in Salesforce. Sales and marketing people often need it as they have to visit the company and give a demo about your product to finalize the deal. Salesforce provides a way to create, edit, delete, and view your contact in one place. You can store contact information such as the first and last names, account name, billing or shipping address, phone number, fax, and e-mail address.

You can create a contact in Salesforce using its user interface, or you can import it from another organization using the import wizard and data loader. To create an account, follow these steps:

1. Go to the **Contact** tab and click on the **New** button that is available at the top of the page.
2. Fill in all the essential information, such as **Last Name, Company Name, Email address, Phone**, and so on.
3. Click on **Save**.

Opportunity management

Opportunity management is a revenue-generating event. By adding deals into Salesforce, it will help you to build a strong pipelining and forecasting feature. An opportunity is also called a deal.

Opportunity – standard fields

The following table shows the important standard fields that are available in the opportunities object:

Field label	Data type	Description
Account name	Lookup (Account)	This field is used to capture the account name for which you are creating an opportunity.
Amount	Currency (16, 2)	This field is to capture the amount of the opportunity.
Close Date	Date	This field is to capture the probable closing date of the deal.
Stage	Picklist	This field is used to capture the current status of the deal. The values available under this picklist are as follows: <ul style="list-style-type: none"> • Prospecting • Qualification • Needs Analysis • Value Proposition • ID Decision Makers • Closed Won • Closed Lost • Negotiation/Review • Proposal/Price Quote • Perception Analysis

Field label	Data type	Description
Probability (%)	Percent (3, 0)	This field is autopopulated based on the stage you select, but you can change the probability (percent) any time by editing opportunity records.
Opportunity name	Text (120)	This field is used to capture the name of the opportunity. You can enter a maximum of 120 characters.

You can find a complete list of standard and custom fields for an opportunity by following the path **Setup | Build | Customize | Opportunities | Fields**, as shown in the following screenshot:

Opportunity Fields

This page allows you to specify the fields that can appear on the Opportunity page. You can create up to 500 Opportunity custom fields.

Note that deleting a custom field will delete any filters that use the custom field. It may also change the result of Assignment or Escalation Rules that rely on the custom field data.

[Set History Tracking](#)

Opportunity Standard Fields			
Action	Field Label	Field Name	Data Type
Edit	Account Name	Account	Lookup(Account)
Edit	Amount	Amount	Currency(16, 2)
Edit	Close Date	CloseDate	Date
	Created By	CreatedBy	Lookup(User)
Edit	Description	Description	Long Text Area(32000)
Edit	Expected Revenue	ExpectedRevenue	Currency(16, 2)
Edit	Forecast Category	ForecastCategoryName	Picklist
	Last Modified By	LastModifiedBy	Lookup(User)
Replace Edit	Lead Source	LeadSource	Picklist
Edit	Next Step	NextStep	Text(255)
Edit	Opportunity Name	Name	Text(120)
Edit	Opportunity Owner	Owner	Lookup(User)
Edit	Primary Campaign Source	Campaign	Lookup(Campaign)
Edit	Private	IsPrivate	Checkbox
Edit	Probability (%)	Probability	Percent(3, 0)
Edit	Quantity	TotalOpportunityQuantity	Number(16, 2)
Replace Edit	Stage	StageName	Picklist
Replace Edit	Type	Type	Picklist

Creating a new opportunity

You can create an opportunity in Salesforce using its user interface, or you can import it from another organization using the data loader. Here, we will discuss ways to create an opportunity through the Salesforce user interface. To create an account, follow these steps:

1. Go to the **Opportunity** tab and click on the **New** button that is available at the top of the page.
2. Fill in all the required information, as shown in the following screenshot:

The screenshot shows the Salesforce 'New Opportunity' form. The form is titled 'Opportunity Edit' and 'New Opportunity'. It contains several sections:

- Opportunity Information:** Opportunity Owner: Rakesh Gupta; Opportunity Name: Deal demo; Account Name: apiuss; Type: Potential Customer; Primary Campaign Source: apiuss; Potential Customer: ; Close Date: 4/1/2014; Stage: Proposal/Price Quote; Probability (%): 75; Amount: 10000.
- Additional Information:** Lead Source: Employee Referral; Next Step: with key decision maker.
- Description Information:** Description: (Large text area).

Buttons: Save, Save & New, Cancel.

3. Click on **Save**.

Big deal alert

A big deal alert is an automated e-mail that contains a snapshot of an opportunity that has touched a given threshold. You can set your threshold by entering a trigger amount and probability. The e-mail will be sent when both the triggers are met or exceeded. To create a big deal alert for your organization, follow these steps:

1. Navigate to **Setup | Build | Customize | Opportunities | Big Deal Alert**.
2. Fill in all the fields such as **Trigger Amount, Trigger Probability, From Email Address, From Email Name, Notify Emails**, and so on as shown in the following screenshot:

Big Deal Alert
New

A Big Deal Alert is an automated email that includes a snapshot of an opportunity that has reached a given threshold.

Save Cancel

Step 1. Alert Name

Name

Step 2. Threshold

Trigger Amount

AND

Trigger Probability

Step 3. Alert Settings

Active

From Email Name

From Email Address

Use Page Layout and Language From

Step 4. Recipients

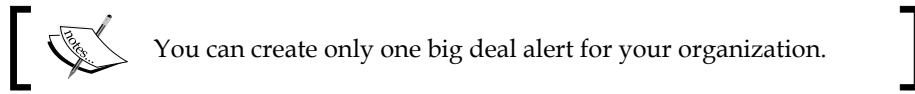
Notify Emails

Notify CC Emails

Notify BCC Emails

Notify Opportunity Owner

3. Click on **Save**.



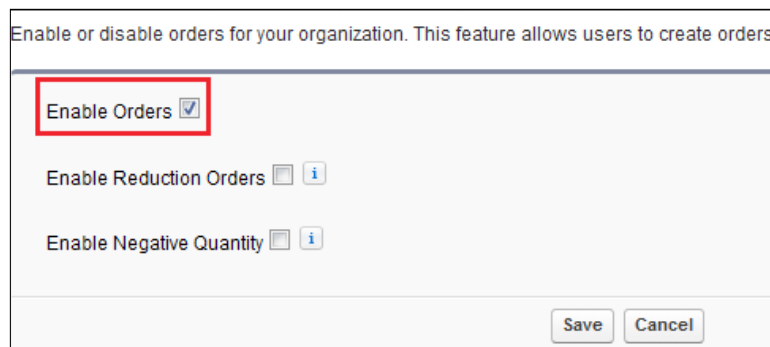
Order management

As soon as you win a deal, the next step is to ship the order and track the order delivery. In Spring'14, Salesforce announced a new feature called order management. Now, you can manage an order within Salesforce. Here, you can create, delete, activate, deactivate, delete, and reduce an order. The orders feature is available in the Developer, Performance, Enterprise, Professional, and Unlimited editions of Salesforce. Reduction in the order feature is available in the Developer, Performance, Enterprise, and Unlimited editions of Salesforce.

Enabling orders


To enable order management for your organization, follow these steps:


1. Navigate to **Setup | Build | Customize | Orders | Settings**.
2. Select the **Enable Orders** checkbox as shown in the following screenshot:



Enable or disable orders for your organization. This feature allows users to create orders

Enable Orders

Enable Reduction Orders 

Enable Negative Quantity 

3. Click on **Save**.

Orders – standard fields

The following table shows the important standard fields that are available in the orders object:

Field label	Data type	Description
Account Name	Lookup (account)	This field is used to capture the account name for which you are creating orders.
Order Start Date	Date	This field is used to capture the order effective date.
Contract Number	Lookup (contract)	This field is used to capture the contract details.
Status	Picklist	This field is used to capture the current status of the order. The values available under this picklist are as follows: <ul style="list-style-type: none">• Draft• Activated
Billing Address	Address	This field is used to capture the company's billing address.
Shipping Address	Address	This field is used to capture the company's shipping address.

You can find a complete list of standard and custom fields for an opportunity by following the path **Setup | Build | Customize | Orders | Fields**, as shown in the following screenshot:

Order Fields

This page allows you to specify the fields that can appear on the Order page. You can create up to 100 Order custom fields.

Note that deleting a custom field will delete any filters that use the custom field. It may also change the result of Assignment or Escalation Rules that rely

[Set History Tracking](#)

Order Standard Fields			
Action	Field Label	Field Name	Data Type
Edit	Account Name	Account	Lookup(Account)
Edit	Account Number	AccountNumber	Text(40)
Edit	Activated By	ActivatedBy	Lookup(User)
Edit	Activated Date	ActivatedDate	Date/Time
	Billing Address	BillingAddress	Address
Edit	Bill To Contact	BillToContact	Lookup(Contact)
Edit	Company Authorized By	CompanyAuthorizedBy	Lookup(User)
Edit	Company Authorized Date	CompanyAuthorizedDate	Date
Edit	Contract End Date	ContractEndDate	Date
Edit	Contract Name	ContractName	Text(80)
Edit	Contract Number	Contract	Lookup(Contact)
	Created By	CreatedBy	Lookup(User)
Edit	Customer Authorized By	CustomerAuthorizedBy	Lookup(Contact)
Edit	Customer Authorized Date	CustomerAuthorizedDate	Date
Edit	Description	Description	Long Text Area(32000)
	Last Modified By	LastModifiedBy	Lookup(User)
Edit	Order Amount	TotalAmount	Currency(16, 2)
Edit	Order End Date	EndDate	Date
Edit	Order Name	Name	Text(80)
	Order Number	OrderNumber	Auto Number
Edit	Order Reference Number	OrderReferenceNumber	Text(80)
Edit	Order Start Date	EffectiveDate	Date
Replace Edit	Order Type	Type	Picklist
Edit	PO Date	PoDate	Date
Edit	PO Number	PoNumber	Text(80)
	Shipping Address	ShippingAddress	Address
Edit	Ship To Contact	ShipToContact	Lookup(Contact)
Replace Edit	Status	Status	Picklist

Creating a new order

You can create a new order in Salesforce using its user interface, or you can import it from another organization using the data loader. Here, we will discuss ways to create an order via the Salesforce user interface. To create an account, follow these steps:

1. Go to the **Orders** tab and click on the **New** button that is available at the top of the page.
2. Fill in all the required information, as shown in the following screenshot:

The screenshot shows the Salesforce 'New Order' form. The form is titled 'New Order' and has a sub-header 'Order Edit' with 'Save' and 'Cancel' buttons. Below this is the 'Order Information' section. It contains two columns of fields. The left column includes: Account Name (Acme1), Order Start Date (3/20/2014), Customer Authorized By, Company Authorized By, Billing Street, Billing City, Billing State/Province, Billing Zip/Postal Code, Billing Country, and Description. The right column includes: Contract Number (00000101), Order Type (None), Status (Draft), Shipping Street, Shipping City, Shipping State/Province, Shipping Zip/Postal Code, and Shipping Country. At the bottom of the form are 'Save' and 'Cancel' buttons.

3. Click on **Save**.



To create an order for an account, at least an active contract of that account is required. The order's start date can't be earlier than the contract's start date.

Activating an order

To activate an order, go to the **Orders Detail** page and click on the **Activate** button, as shown in the following screenshot:

The screenshot shows the 'Order 00000101' detail page. At the top, there are navigation tabs: 'Order Products', 'Order History', 'Open Activities', 'Activity History', and 'Notes & Attachments'. Below these, the 'Order Detail' section contains a table of order information. The 'Activate' button is highlighted with a red box. The table includes the following data:

Order Number	00000101	Contract Number	00000101
Account Name	Acme1	Order Amount	\$0.00
Order Start Date	4/4/2014	Order Type	
Customer Authorized By		Status	Draft
Company Authorized By		Shipping Address	
Billing Address		Activated Date	
Activated By			
Created By	Rakesh Gupta, 3/23/2014 11:33 AM	Last Modified By	Rakesh Gupta, 3/23/2014 11:33 AM
Description			



To activate or deactivate orders, users must have the **Activate Orders** user permission. An order must have order products before it can be activated.

Service Cloud overview

Service Cloud is a product designed to automate your support process. By implementing this, an organization can boost its support process. This includes case, knowledge base, article management, entitlement, and many more features. Service Cloud includes everything that you need to make your support process faster.

Service Cloud can support your business purposes if you are looking for a solution to provide a call center setup, case management, service contract; additionally, you can track the day-to-day work of a support agent. It will help you close a case faster and make your customer happier.

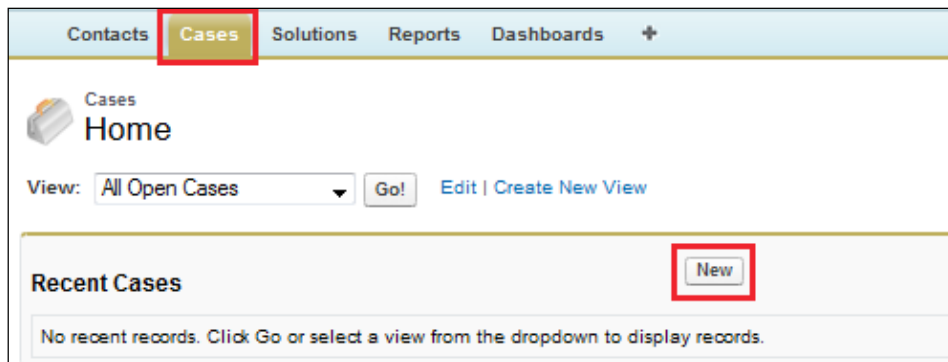
Case management

Salesforce provides a number of ways to capture a case:

- Creating a case manually
- Using an Apex data loader (discussed in *Chapter 7, Concepts of Data Management*)
- Using Email-to-Case
- Using Web-to-Case

Creating a case manually

If a support agent wants to create a case manually, then he or she can go to the **Cases** tab, which is available at the top of the page, and click on the **New** button as shown in the following screenshot:



Fill in all the required information and click on **Save**.

Email-to-Case

Email-to-Case provides a way to create a case when an e-mail is sent to a predefined e-mail address. Let's take an example. A universal container is an Appiuss customer, and Appiuss wants to leverage the Email-to-Case feature for the universal container so they can create a case from the mail, instead of calling a support agent.

Email-to-Case setting

First of all, you have to enable Email-to-Case for your organization. To do this, follow these steps:

1. Navigate to **Setup | Build | Customize | Cases | Email-to-Case**.
2. Click on **Edit** and enable this feature. Also, select the **Enable On-Demand Service** checkbox as shown in the following screenshot:

Email-to-Case Settings [Help for this Page](#)

Email-to-Case settings for your organization

To create cases from Outlook, select the options Enable Email-to-Case, as well as Enable On-Demand Service.
After you enable Email-to-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

When sending email from a case, insert Thread ID in the following sections: I = Required Information

Email Subject

Email Body

On-Demand Service

On-Demand Email-to-Case enables your organization to automatically create cases from email without having you download and install the Email-to-Case agent behind your network's firewall. Simply configure your email system to forward case submission emails to the Email Services Address provided to you by salesforce.com.

Enable On-Demand Service i

Failure Response Settings:

Over Email Rate Limit Action Bounce message ▼

Unauthorized Sender Action Discard message ▼

3. Click on **Save**.

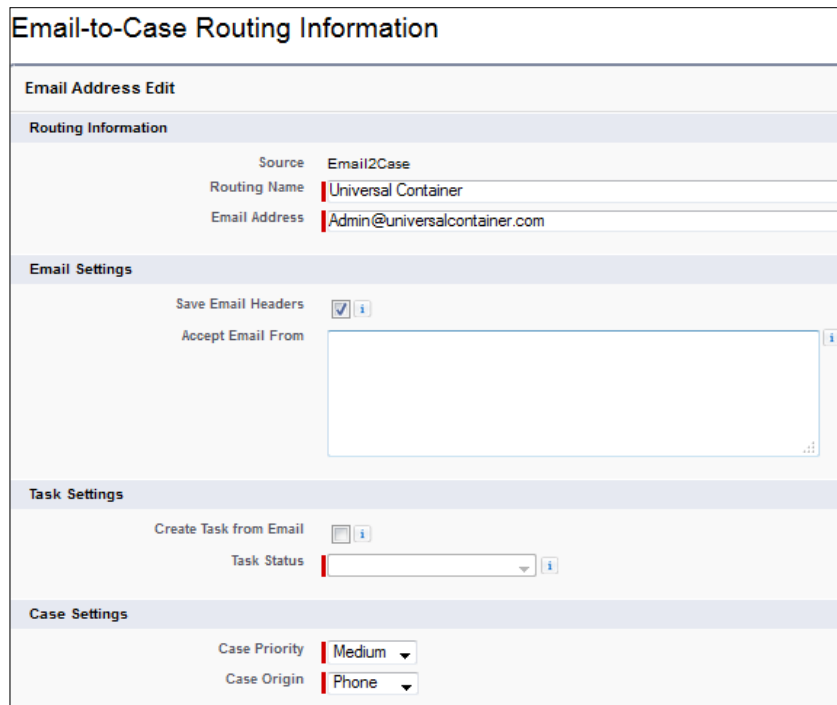
Setting up routing addresses

Now, the next step is to set up a routing e-mail address to which the user will send an e-mail to create a case using the Email-to-Case feature. Follow these steps to set up the routing address:

1. Navigate to **Setup | Build | Customize | Cases | Email-to-Case**.
2. Go to the **Routing Addresses** list and click on **New** as shown in the following screenshot:



3. Fill in the required information such as **Routing Name**, **Email address** (e-mail address from where the e-mail is to be sent), **Case Priority**, and **Case Origin**, as shown in the following screenshot:



The screenshot displays the 'Email-to-Case Routing Information' form, which is organized into several sections:

- Email Address Edit**: This section contains the 'Routing Information' fields:
 - Source: Email2Case
 - Routing Name: Universal Container
 - Email Address: Admin@universalcontainer.com
- Email Settings**: This section includes:
 - Save Email Headers: (with an information icon)
 - Accept Email From: An empty text input field (with an information icon)
- Task Settings**: This section includes:
 - Create Task from Email: (with an information icon)
 - Task Status: A dropdown menu (with an information icon)
- Case Settings**: This section includes:
 - Case Priority: Medium (dropdown menu)
 - Case Origin: Phone (dropdown menu)

4. Click on **Save**.

- Now, Salesforce will send an e-mail notification with the verification link to the address you mentioned in the last step. Once verified by the end user, it is ready to use:

Email Services Address admin@0-2nzjks64hak4vk0vsmu3ohxs73icbg9i1ceswuf2z06lwaha2ju.9-nqvheavy.ap1.case.salesforce.com

From the next time, whenever the universal container wants to raise a case with Appiuss, he or she has to send an e-mail to **Email Service Address** from the address that we mentioned in the routing e-mail address.

Web-to-Case

Unlike the Web-to-Lead service that is used to capture a lead online, Salesforce provides another feature to capture a case from the Web using Web-to-Case. For example, Appiuss want to capture a case in Salesforce whenever the customer submits a support request from their website support page. To do this, follow these steps:

- Enable Web-to-Case.
- Generate an HTML code.
- Use the code in your support page available on your website.


Enabling Web-to-Case

To enable Web-to-Case, follow these steps:

- Navigate to **Setup | Build | Customize | Cases | Web-to-Case**.
- Click on the **Enable Web-to-Case** link as shown in the following screenshot:

Capturing Cases from Your Website

Using a simple web form, you can allow your customers to submit cases directly to your custom



Steps to Capturing Cases from Your Website

- Enable Web-to-Case** for your organization.
- Set up custom case fields**
Set up custom case fields for the information you want to gather from your website.
[Tell me more!](#) »
[Set up custom case fields](#)
- Generate the HTML**
Generate the HTML needed to capture case data and give it to your webmaster to
[Tell me more!](#) »
[Generate the HTML](#)

3. It will redirect you to a new page where you can enable this service by selecting the **Web-to-Case Enabled** checkbox. You can also select **Default Response Template** and **Default Origin**:

Web-to-Case Settings

Web-to-Case Settings

Enable your organization to receive online cases.

Web-to-Case Enabled

Use Case Auto-Response Rules to select different email response templates based on attributes

Default Response Template

Default case origin for cases submitted online.

Default Origin **Web**

Save Cancel

4. Click on **Save**.

Generating an HTML code

To generate an HTML code for Web-to-Case, follow these steps:

1. Navigate to **Setup | Build | Customize | Cases | Web-to-Case**.
2. Click on the **Generate the HTML** link. It will redirect you to the **Capturing Case Information from Your Website** page.
3. Select the field that you want to display in the **Web-to-Case** page, Enter the redirected URL as shown in the following screenshot:

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

Capture Cases

Select the fields to include:

Available Fields		Selected	
Company	Add Remove	Contact Name	Up Down
Type		Email	
Status		Phone	
Case Reason		Subject	
Priority		Description	

NOTE: Would you like to add custom fields that you [Tell me more.](#)

Visible in Self-Service Portal


Enter the URL that the user will be returned to:

URL

Language **Default**

Generate Cancel

4. Once done, click on the **Generate** button to generate the HTML code.
5. Now, use this code in the **Company Support** page or wherever your organization wants.

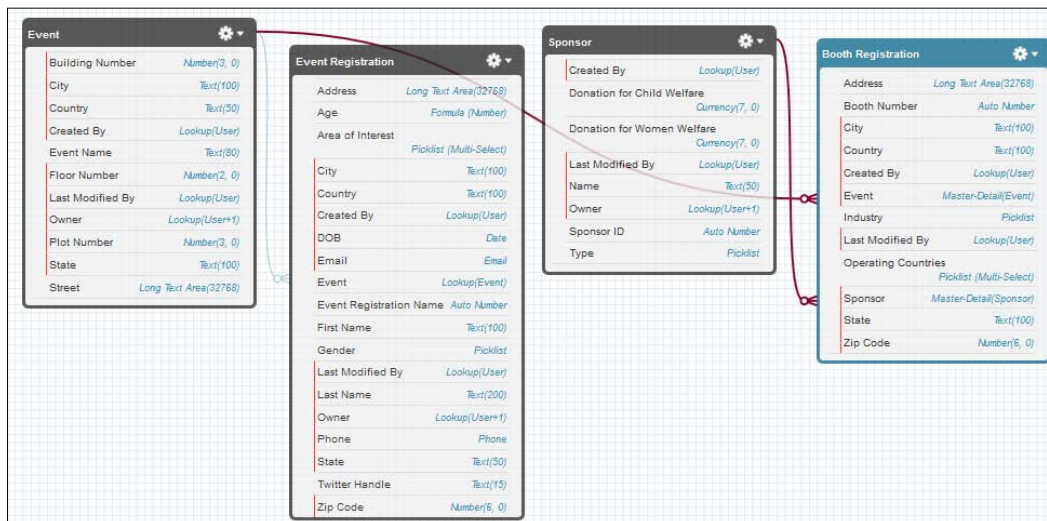
[ With the Web-to-Lead feature, you can capture up to 500 leads per day.]

Streamlining a business process

Salesforce comes with many standard objects, but if your requirement is not fulfilled by using them, you can go ahead and create custom objects.

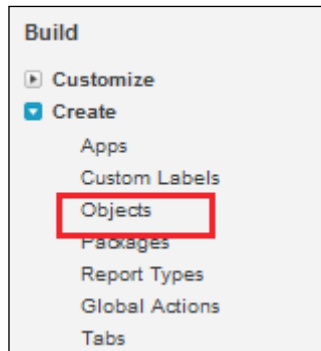
Creating a custom object

In Salesforce, database tables are treated as objects. These objects have fields, and any type of app that is built in Salesforce relies on it. We will now be developing a sample **Event Management** app for the company Appiuss that is going to organize an event for women and child welfare, where companies across the globe will be able to set up their booths to market themselves. This will allow local communities or people to participate in events for free, and the companies will sponsor this event. We will be building the following database model throughout the book from now on:

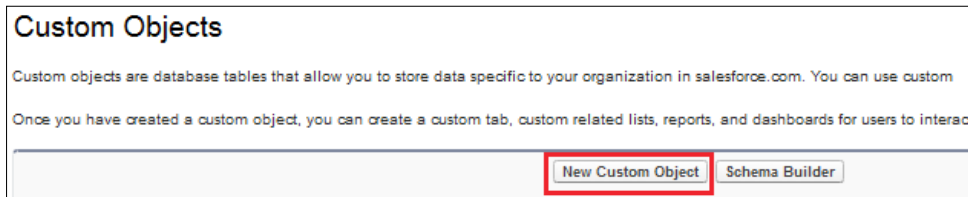


The Event object will have a one-to-many relationship with the Event Registration object, and the Sponsor object will have a one-to-many relationship with the Booth Registration object. The Booth Registration object works as a junction object for the Event and Sponsor objects. Let's start by creating an Event object. To do this, follow these steps:

1. Navigate to **Setup | Build | Create | Objects** as shown in the following screenshot:

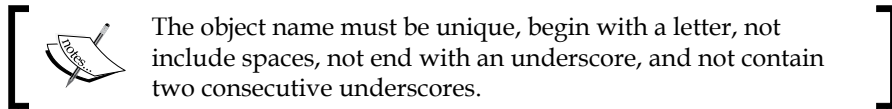


2. Click on the **New Custom Object** button as shown in the following screenshot:



3. Enter all the details under the **Custom Object Information** section, where you have to enter values in the following fields:
 - **Label:** This is the label of the object's definition. This label is used on page layouts and reports. Here, we used Event as the label of this object.
 - **Plural Label:** This is used in Salesforce's object tabs. In this case, we have used Events as the plural label.
 - **Start with Vowel:** This is used to check whether the label starts with a vowel sound and should be preceded by **an** instead of **a**.

- **Object name:** This is denoted by T or the Apex code. This is nothing but the API name of the object that you have to use when you have to use it from anywhere in the formula or Apex code. For a custom object, Salesforce automatically appends `__c` with the object name. Finally, the event object name will look like `event__c`.



- **Description:** Always use a meaningful full name so other developers can easily understand why this object is created.
- **Context-Sensitive Help Setting:** Salesforce provides a standard help page for all custom objects. If you want to overwrite it for the custom object, then you have to choose **Open a window** using a **Visualforce** page option.
- **Content Name:** This is where you can select the **Visualforce** page that will open when you click on the **Help** link.

Finally, the **Custom Object Information** section will look like this:

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context-Sensitive Help Setting Open the standard Salesforce.com Help & Training window
 Open a window using a Visualforce page

Content Name


Next, fill the **Record Name Label and Format** section.

- Under **Enter Record Name Label and Format** enter `Event Name` under **Record Name** and select **Data Type** as **Text**, as shown in the following screenshot:

- Now, select the available optional features mentioned as follows:
 - Allow Reports:** This option will allow you to create a report in the `Event` object. If it is not selected, then you can't create a report in this object.
 - Allow Activities:** This feature allows the user to add a task and event in the object records. If this checkbox is selected, the **Open Activities** and **Activity History** list will be autoadded to the page's layout.
 - Track Field History:** This feature allows you to track the records of a specific object when the field value changes. Once this checkbox is selected, it will capture both the old and new values for the **Field Under Object History** list. We will discuss more about this in the field-history-tracking section.
 - Deployment Status:** This option is used to deploy a specific object. When the **In development** section is selected, only the system administrator can access these objects. To deploy this, select the **Deployed** option.
- Click on **Save**.

As soon as you create custom objects, Salesforce automatically creates a few standard fields such as **Created By**, **Last Modified By**, **Owner**, and **Event Name** in it. You cannot delete standard fields from Salesforce, such as **CreatedBy** and **LastModifiedBy**. These are audit fields that are automatically calculated by Salesforce. For the `Event` object, it will look like this:

Standard Fields			
Action	Field Label	Field Name	Data Type
	Created By	CreatedBy	Lookup(User)
Edit	Event Name	Name	Text(80)
	Last Modified By	LastModifiedBy	Lookup(User)
Edit	Owner	Owner	Lookup(User,Queue)

 If you want to edit audit fields, you have to contact Salesforce's support team by raising a case.

In a similar fashion, you can create three extra objects with the following details:

Object	Record name	Data type
Event Registration	Registration ID	Auto Number (Format ER-{0000})
Sponsor	Sponsor ID	Auto Number (Format S-{0000})
Booth Registration	Booth Number	Auto Number (Format B-{0000})

Tab creation

To view the records related to objects, we need to have a tab associated to that object. Without this, you cannot create records in Salesforce using the native Salesforce user interface.

Salesforce allows you to browse records in a tabbed manner. In Salesforce, tabs are ways to navigate records. You can create, manage, edit, and delete records after clicking on the tabs. You need to create a tab and associate it with an object so that you can create records of it from the Salesforce standard UI. There are three types of tabs in Salesforce as follows:

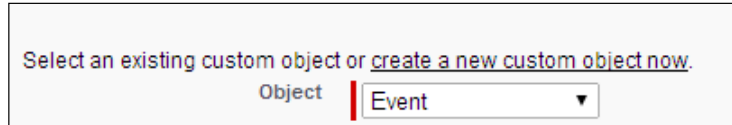
- **Custom Object tabs:** This type of tab is used to associate with a custom object so that you can display custom object records in the user interface
- **Web tabs:** This type of tab is used to display any external web-based application or web page in a Salesforce tab
- **Visualforce tabs:** This type of tab is used on the Visualforce page

For example, you want to create a tab for the newly created Event object in Salesforce; to do this, follow these steps:

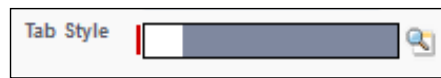
1. Navigate to **Setup | Build | Create | Tabs**.
2. Go to the **Custom Object Tabs** section and click on the **New** button as shown in the following screenshot:



3. Select the **Event** object from the list of objects as shown in the following screenshot:



4. Now, select **Tab Style** by clicking on the magnifying glass icon as shown in the following screenshot:



5. You will see a pop-up browser window that will ask you to select a tab style:



- Click on any style you want (here, we are selecting the heart style). Once selected, the pop up will disappear. Enter a short description, and finally, it will look like the following screenshot:

New Custom Object Tab

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#).

Object | Event

Tab Style | Heart

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link | --None--

Enter a short description.

Description | This tab is used to display Event object

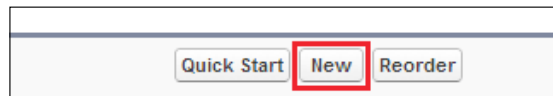
- Click on **Next**. On the next screen, keep the default values of all the profiles and again click on **Next**.
- Finally, you can choose the app you want to add this tab to. Once done, click on **Save**.

In a similar fashion, you can create tabs for the remaining three objects.

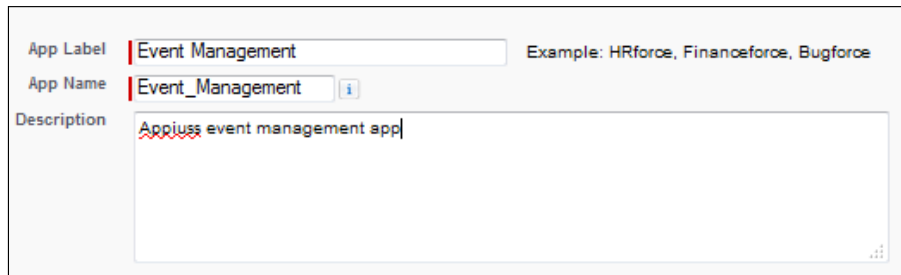
App creation

An app is nothing but a combination of tabs. Now, we will create an app for our own event management. To do this, follow these steps:

- Navigate to **Setup | Build | Create | Apps**.
- Click on the **New** button:



3. This will redirect you to a new screen where you have to select the application type **Custom App** and click on **Next**.
4. Now when you enter data in the **App Label** field, **App Name** will be automatically populated based on the app label. Enter the description as shown in the following screenshot:




App Label | Event Management | Example: HRforce, Financeforce, Bugforce

App Name | Event_Management |

Description | Appiuss event management app |

5. Click on **Next**. Salesforce provides you with a way to brand your app using the company or event logo. To do to this, click on the **Insert an Image** button to use your own logo; however, you will have to first upload the logo into the document tab and then you will be able to use it:





Step 2. Choose the Image Source for the Custom App Logo

Optionally, specify a logo for this custom app. To do so, choose an image file from the document library.

The file size of a custom app logo must be smaller than 20 KB. (For comparison, the salesforce.com logo is about 3 KB). To upload an image file, maximum of 300 pixels wide by 55 pixels high for best results. Larger images will be resized and may appear distorted.

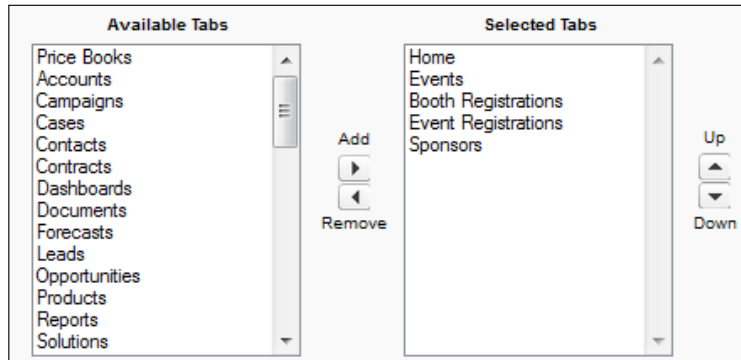
Insert an Image



[ The file size of a custom app logo must be smaller than 20 KB.]

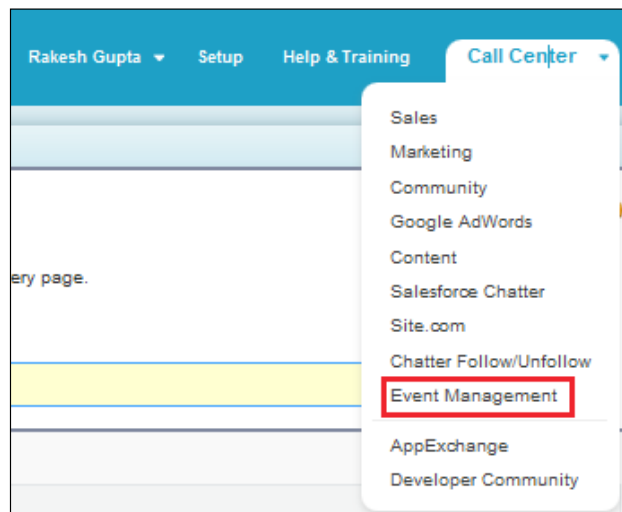
6. Let the image be the default Salesforce image and click on **Next**.

7. Now, you can add a tab into your app. To do this, move the tabs from **Available Tabs** to **Selected Tabs** as shown in the following screenshot:



8. Use the up and down buttons to order the tabs.
 9. Click on **Next** and select the profile visibility for this app.
 10. Click on **Save**.

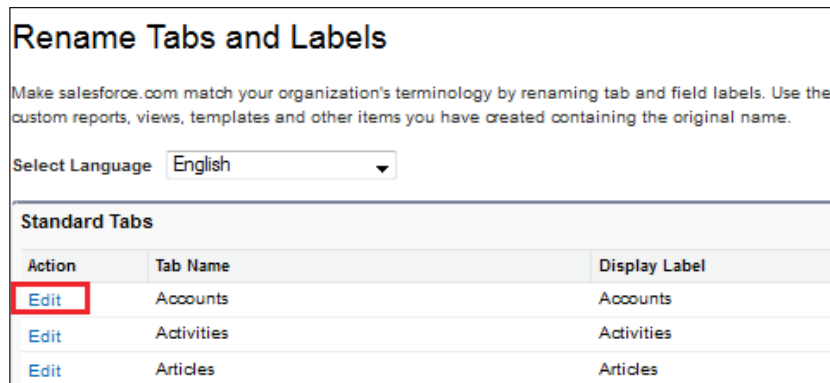
Now, in order to navigate to your app, in the upper-right corner of the screen, click on the app dropdown as shown in the following screenshot. Then, click on the app name, **Event Management**:



Renaming standard tabs and labels

To change standard object tabs and field labels, follow these steps:

1. Navigate to **Setup | Build | Customize | Tab Names and Labels | Rename Tabs and Labels**.
2. Click on the **Edit** link available in front of the object name, in our case, **Accounts** as shown in the following screenshot:



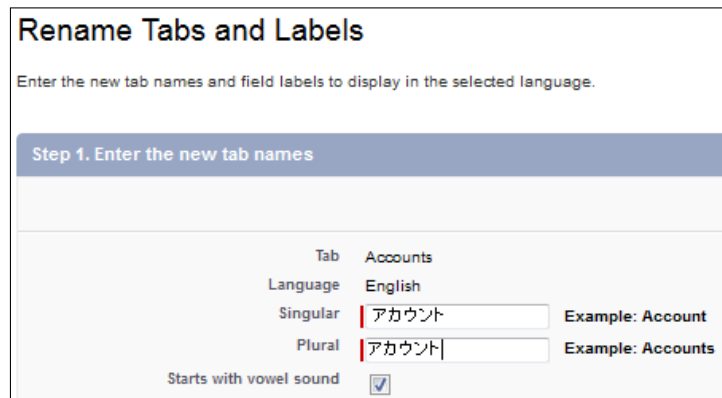
Rename Tabs and Labels

Make salesforce.com match your organization's terminology by renaming tab and field labels. Use the custom reports, views, templates and other items you have created containing the original name.

Select Language

Action	Tab Name	Display Label
Edit	Accounts	Accounts
Edit	Activities	Activities
Edit	Articles	Articles

3. It will redirect you to a new page where you can change the singular and plural name:



Rename Tabs and Labels

Enter the new tab names and field labels to display in the selected language.

Step 1. Enter the new tab names

Tab	Accounts
Language	English
Singular	<input type="text" value="アカウント"/> Example: Account
Plural	<input type="text" value="アカウント"/> Example: Accounts

Starts with vowel sound

4. In the next window, you can change the standard field's label. Once done, click on **Save**.

The significance of various field types in Salesforce

Every database comprises some columns or fields to store values related to the database table. In Salesforce, every object comprises its fields. The following table shows the data type fields available in Salesforce in detail:

Data type	Description
Autonumber	This field is an autoincrement field; you need to define its format and the starting value once. For example, in an <code>Event Registration</code> object, you want to add an autonumber field called <code>Registration ID</code> . You can do this by providing the format <code>ER-{00000}</code> with the starting value as 1. Now the records will be created automatically with the <code>Registration ID</code> <code>ER-00001</code> and so on.
Formula	Based on the formula expression defined at the time of adding this field to an object, this field will populate the value. This is a read-only field.
Rollup summary	This field is only available for the master object in a master-detail relationship. By using this field, you can perform the following operations based on child object records: <ul style="list-style-type: none"> • SUM: This is the sum of all the child-records-specified fields. • MIN: This populates the minimum value from the child-records-specified field. • MAX: This populates the maximum value from the child-records-specified field. • COUNT: This populates the number of child records available to the master. This is read-only field.
Lookup relationship	This field is used to define the lookup relationship between the objects.
Master-detail relationship	This field is used to define the master-detail relationship between the objects.
Checkbox	This field is used to define a checkbox, which can contain only one type of value, that is, check (true) or uncheck (false).
Currency	This field is used to store the currency in decimals.
Date	This field is used to store the date.
Date/time	This field is used to store the date with a timestamp.
E-mail	This is an e-mail field used to store e-mail addresses.

Data type	Description
Geolocation	This field stores the geo location coordinates to show a particular location on the map.
Number	This field is used to store numeric values.
Phone	This field is used to store phone numbers.
Percent	This field is able to store the percentage with decimal values, and it automatically appends the % suffix to the value entered.
Picklist	This field is used to store multiple predefined values from which the user has to select any one.
Picklist (Multi-Select)	This field is used to store multiple predefined values from which the user can choose multiple values or all of them.
Text	This field can hold text up to a defined length.
Text area	This field can hold text of a length of 255 characters with separate lines.
Text area (long)	This field can hold text up to a length of 32,768 characters with separate lines.
Text area (rich)	This field can hold text up to a length of 32,768 characters and images, and it allows you to use the formatting option.
Text (encrypted)	This field can be used to enter text that is sensitive, for example, credit card details.
URL	This field can be used to store the website's URL.

Adding fields to objects

Now, we will create a custom field called city (the data type will be text and the length will be 100 characters) in an `Event` object. To do this, follow these steps:

1. Navigate to **Setup | Build | Create | Objects**.
2. Go to the **Event** object and then go to the event object detail page by clicking on the **Event** label as shown in the following screenshot:

Action	Label	Installed Package	Master Object	Deployed	Description
Edit	Ad Group	Salesforce for Google AdWords		✓	A Google Ad Group is a collection of Text Ads and Keywords
Edit Del	Booth Registration		Sponsor Event	✓	
Edit Del	Event			✓	This object is used to store event related information
Edit Del	Event Registration			✓	

3. Navigate to the **Custom Fields & Relationships** section and click on the **New** button.
4. Select the data type as **Text** and click on **Next**.
5. This will redirect you to a new window where you have to enter **Field Label**, **Length**, **Field Name** (this will be autopopulated from the field label, and Salesforce will append __c), **Description**, and **Help Text** (so whenever a user hovers over it, they will get the information they need to enter in this field). You can also set the field as required by selecting the **Required** checkbox. You also have the option to make the field **Unique** and set it as **External ID**; additionally, you can enter a default value in this field, as shown in the following screenshot:

The screenshot shows the configuration page for a new text field in Salesforce. The field is named "City". The length is set to 100. The description and help text are both "Enter city name where event will be held". The field is required, and the "Unique" checkbox is checked. The "External ID" checkbox is also checked. The default value is set to "Show Formula Editor".

Field Label ⓘ

Please enter the maximum length for a text field below.

Length

Field Name ⓘ

Description

Help Text ⓘ

Required Always require a value in this field in order to save a record

Unique Do not allow duplicate values

Treat "ABC" and "abc" as duplicate values (case insensitive)

Treat "ABC" and "abc" as different values (case sensitive)

External ID Set this field as the unique record identifier from an external system

Default Value [Show Formula Editor](#)

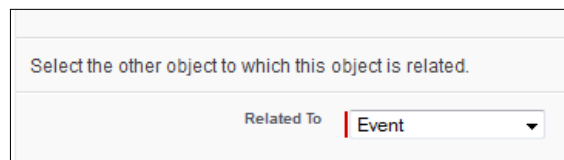
Use formula syntax: e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7

6. Click on **Next** and set the field-level visibility for our app and let it be.
7. Click on **Save**.

Adding relationships to objects

Now, we will create a relationship between an `Event` and `Event Registration` object. We will create a lookup relationship where `Event` will act as a parent and `Event Registration` will work as a child. To do this, follow these steps:

1. Navigate to **Setup | Build | Create | Objects**.
2. Navigate to the **Event Registration** object and then go to the object detail page by clicking on the **Event Registration** label.
3. Navigate to the **Custom Fields & Relationships** section and click on the **New** button.
4. Select the field data type **Lookup Relationship**.
5. Click on **Next**, and now in the field **Related to**, select the master object that you want to associate this object with. Here, select **Event** as shown in the following screenshot:



The screenshot shows a form field for selecting a related object. The text above the field reads "Select the other object to which this object is related." Below this, there is a dropdown menu labeled "Related To" with "Event" selected and a downward arrow.

6. Enter data in the **Field Label**, **Field Name** (later on, this will be used as an API name), **Description**, **Help Text**, **Child Relationship Name**, **Required**, and **What to do if the lookup record is deleted?** fields.
7. Optionally, you can set the lookup filter. Whenever a user clicks on this field in the event registration record, you can filter out a value; for example, the user can only see the event that is created by the system administrator, Sagar Pareek:

The screenshot shows a configuration form for a field. The 'Field Label' and 'Field Name' are both set to 'Event'. The 'Description' and 'Help Text' fields are empty. The 'Child Relationship Name' is set to 'Event_Registrations1'. Under the 'Required' section, the checkbox 'Always require a value in this field in order to save a record' is unchecked. Under the 'What to do if the lookup record is deleted?' section, the radio button 'Clear the value of this field. You can't choose this option if you make this field required.' is selected. At the bottom, there is a 'Lookup Filter' section with a link to 'Tell me more!' and a 'Show Filter Settings' button.

8. Click on **Next** and set the profile visibility for this relationship field. Let this be the default setting and click on **Next**.
9. Add this field to the available page layout.
10. Add the event registration to the related list on the event page and click on **Save**.

Event

You can use the following table to practice adding fields and relationships to all the objects used in this app development:

Field type	Label	Length/Values	Required
Number	Plot Number	3 (0- Decimal Places)	Yes
Number	Building Number	3 (0-Decimal Places)	Yes
Number	Floor Number	2 (0-Decimal Places)	Yes
Text (Long)	Street	32,768	
Text	City	100	
Text	State	100	Yes
Text	Country	100	Yes

Event Registration

The following fields can be added to the Event Registration object:

Field Type	Label	Length/Values	Required
Text	First Name	200	No
Text	Last Name	200	Yes
Phone	Phone		
Email	Email		Yes
Text	Address		Yes
Text	City		Yes
Text	State		Yes
Text	Country		Yes
Number	Zip Code	6 (0 Decimal Places)	Yes
Picklist	Gender	<ul style="list-style-type: none"> • Male • Female 	No
Text	Twitter Handle	15	No
Picklist (Multi- Select)	Area of Interest	<ul style="list-style-type: none"> • Technology • Sports • Boating • Dancing • Singing 	
Lookup	Event		Yes
Date	DOB		Yes
Formula (Return Type Number)	Age		

Sponsor

The following fields can be added to the Sponsor object:

Field type	Label	Length/Values	Required
Formula	Amount		Yes
Text	Name	200	Yes
Picklist	Type	<ul style="list-style-type: none"> • Silver • Gold • Platinum 	Yes

Field type	Label	Length/Values	Required
Currency	Donation for child welfare		Yes
Currency	Donation for women welfare		Yes

Booth Registration

The following fields can be added to the Booth Registration object:

Field type	Label	Length/Values	Required
Text	City		Yes
Text	State		Yes
Text	Country		Yes
Number	Zip Code		Yes
Picklist	Industry	<ul style="list-style-type: none"> • IT • Telecom • Retail • Marketing • BPO • Aviation • Food Supply • Fashion • Child Welfare • Women Welfare 	Yes
Picklist (Multiselect)	Operating Countries	<ul style="list-style-type: none"> • India • USA • Canada • Japan • UK 	Yes

Page layout

Page layout helps you to organize any object's detail and edit page view. By using page layout, you can add or remove fields from the detail page; organize the related lists; add custom buttons, links, and actions; and organize the fields in a section.

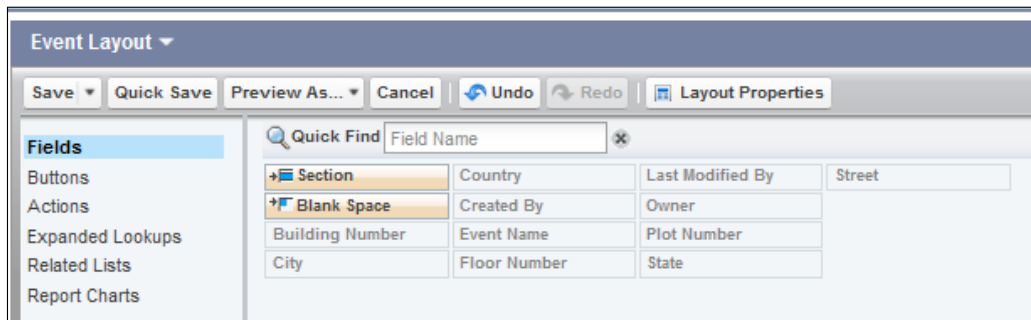
To edit the page layout of any custom object, follow these steps:

1. Navigate to **Setup | Build | Create | Objects**.
2. Navigate to the **Event** object and then go to the object detail page by clicking on the **Event** label.
3. Under the **Page Layouts** section, click on **Edit** in front of **Event Layout**, as shown in the following screenshot:



Page Layouts			New	Page Layout Assignment
Action	Page Layout Name	Created By		
Edit Del	Event Layout	Sagar Pareek, 3/22/2014 9:31 PM		

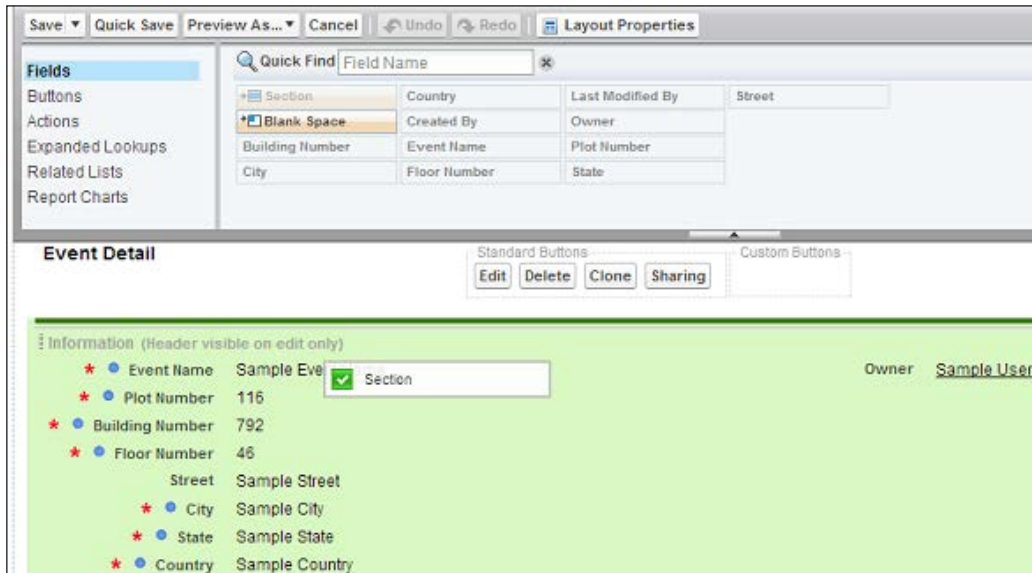
4. Now you will be redirected to the advanced layout editor screen where you will see the following palette at the top of the page:



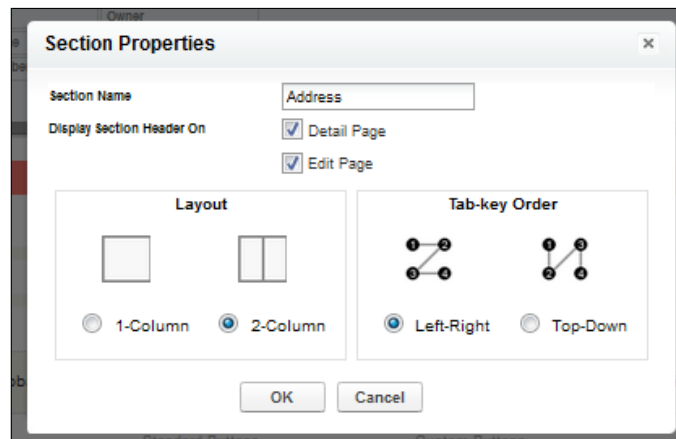
The screenshot shows the 'Event Layout' advanced layout editor. At the top, there is a toolbar with buttons for 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. Below the toolbar is a 'Quick Find' search box labeled 'Field Name'. The main area is divided into two panels. The left panel is a navigation menu with categories: 'Fields', 'Buttons', 'Actions', 'Expanded Lookups', 'Related Lists', and 'Report Charts'. The right panel displays a grid of available fields for selection, including 'Section', 'Blank Space', 'Country', 'Created By', 'Building Number', 'Event Name', 'City', 'Floor Number', 'Last Modified By', 'Owner', 'Plot Number', and 'State'.

5. The left-hand side section can help you to navigate between **Fields**, **Buttons**, **Actions**, **Expanded Lookups**, **Related Lists**, and **Report Charts**, as shown in the preceding screenshot.
6. Click on **Fields** on the left-hand side panel of the palette, and in the right-hand side portion, you will see that no field is available to use as all the fields are already made available on the page layout. If this was not the case, you could have dragged-and-dropped the fields to the bottom section of the page.

7. Here, you can create a section for a group of fields and drag-and-drop the section from the right-hand side to the bottom section of the page, outside the palette, as shown in the following screenshot:



8. Now, once you finish dragging the section, you will see the following pop up. Enter **Address** in the **Section Name** field, select **Layout** as **2-Column**, and **Tab-key Order** as **Left-Right**.



9. Click on **OK**.
10. Now, you can see the **Address** section created on the page.
Just drag-and-drop all the fields, except for **Event Name**.
11. Click on **Save**.

Now, if you go to any of the detail pages of the existing event records, you will be able to see this section:

▼ Address				
Plot Number	1	Building Number	2	
Floor Number	3	State	Rajasthan	
City	Bikaner	Country	India	
Street	KEM Road			
Created By	Sagar Pareek, 3/23/2014 11:30 AM		Last Modified By	Sagar Pareek, 3/23/2014 6:51 PM
<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Clone"/>				

Setting up record types

Record types in Salesforce let you create records for the same object in different page layout and fields. These are used to categorize the records using different picklist values and page layouts. For example, in the **Booth Registration** object, you want to separate the picklist values for NGO(s) and companies. The NGO(s) will be able to see only the **Child Welfare and Women Welfare** value in the drop-down field industry, but the companies will see all the values except these two. To create record types, follow these steps:

1. Navigate to **Setup | Build | Create | Objects**.
2. Navigate to the **Booth Registration** object and then go to the object detail page by clicking on the **Booth Registration** label.
3. Under the **Record Type** section, click on **New**.
4. This will redirect you to a new screen where you have to enter **Record Type Label** (enter NGO) and **Record Type Name** (enter NGO); don't forget to select the **Active** checkbox. Also, select the profile that can access this record type and then just select the system administrator as shown in the following screenshot:

New Record Type
Booth Registration

Step 1. Enter the details

Enter a name and description for the new record type. The new record type will include all the picklist values from the existing record

Record Type

Existing Record Type: --Master--

Record Type Label: NGO

Record Type Name: NGO

Description:

Active:

5. Click on **Next**. Leave it as the default setting and save it.
6. Go to the **NGO Record Type** detail page. Under the **Picklist Available for Editing** section, click on **Edit** in front of the **Industry** picklist.

Record Type
NGO

[Back to Custom Object: Booth Registration](#)

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

[Edit](#)

Record Type Label: NGO

Record Type Name: NGO

Active:

Namespace Prefix:

Description: This record type will be used by NGO(s)

Created By: [Sagar Pareek](#) 3/23/2014 7:16 PM

Modified By: [Sagar Pareek](#) 3/23/2014 7:25 PM

Picklists Available for Editing

Action	Field	Modified Date
Edit	Industry	3/23/2014 7:25 PM
Edit	Operating Countries	3/23/2014 7:16 PM

7. Add only **Women Welfare and Child Welfare** from the available values to the selected values.

- Under **Default**, select **Women Welfare**. This will be the selected default value as shown in the following screenshot:

The screenshot shows a 'General Properties' dialog box. At the top, it displays 'Field Label' as 'Industry' and 'Record Type' as 'NGO'. Below this is the 'Picklist Values' section, which includes instructions: 'Select an item from the Available Values list and add it to the Selected Values list to include a default picklist value for this Record Type.' There are two lists: 'Available Values' containing IT, BPO, Retail, Marketing, Aviation, Food Supply, and Fashion; and 'Selected Values' containing Women Welfare and Child Welfare. Between the lists are 'Add' and 'Remove' buttons. At the bottom, a 'Default' dropdown menu is set to 'Women Welfare'. 'Save' and 'Cancel' buttons are at the bottom right.

- Click on **Save**.

In a similar way, create another record type named **Companies** and select all the values, except for **Women Welfare** and **Child Welfare**.

Tracking the history

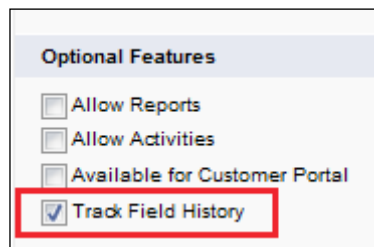
If a record is accessible by many users, then it's a tedious job to track and maintain the field history. For example, the amount field in opportunity is very important, and an organization will want to keep track of the users that change the amount value. A simple solution is to enable the field-history-tracking option for those objects. You can maintain a history of the changes made to the fields in the records of the objects in Salesforce for custom objects and the following standard objects as well:

- Accounts
- Cases
- Contacts
- Entitlements


- Service contracts
- Contract line items
- Contracts
- Leads
- Opportunities
- Articles
- Solutions

Here, we will enable the field-history-tracking option for the `Event Registration` object. To enable this, follow these steps:

1. Navigate to **Setup | Build | Create | Objects**.
2. Click on **Edit** in front of the **Event Registration** object and check the **Track Field History** checkbox as shown in the following screenshot:



3. Click on **Save**.

 You have to do this only for a custom object if you didn't select **Track Field History** checkbox at the time of object creation.

4. Now go back to the **Event Registration** object detail page, navigate to **Custom Fields & Relationships**, and click on the **Set History Tracking** button as shown in the following screenshot:


Custom Fields & Relationships					
		New	Field Dependencies	Set History Tracking	
Action	Field Label	API Name	Data Type	Controlling Field	Modified By
Edit Del	Address	Address__c	Long Text Area(32786)		Sagar Pareek , 3/23/2014 11:14 AM
Edit Del	Age	Age__c	Formula (Number)		Sagar Pareek , 3/23/2014 11:34 AM
Edit Del Replace	Area of Interest	Area_of_Interest__c	Picklist (Multi-Select)		Sagar Pareek , 3/23/2014 11:19 AM

5. Select the field that should be tracked (**City, Address, and Area of Interest**). A maximum of 20 standard and custom fields per object are allowed to be tracked. You can see this in the following screenshot:

Track old and new values	
City	<input checked="" type="checkbox"/>
DOB	<input type="checkbox"/>
Event	<input type="checkbox"/>
First Name	<input type="checkbox"/>
Last Name	<input type="checkbox"/>
Phone	<input type="checkbox"/>
Twitter Handle	<input type="checkbox"/>
Country	<input type="checkbox"/>
Email	<input type="checkbox"/>
Event Registration Name	<input type="checkbox"/>
Gender	<input type="checkbox"/>
Owner	<input type="checkbox"/>
State	<input type="checkbox"/>
Zip Code	<input type="checkbox"/>

Track changes only	
Address	<input checked="" type="checkbox"/>
Area of Interest	<input checked="" type="checkbox"/>

6. Click on **Save**.

 In order to see the field history, make sure the **Field History** list is added to the page layout of the object for which the field history is enabled. You cannot track formula fields, rollup summary, last modified, and created by fields.

Summary

In this chapter, we went through different types of relationships, and how to create objects and fields and establish a relationship between them in Salesforce. We started with the type of relationships and then followed this up with an overview of Sales Cloud and Service Cloud in Salesforce. We also discussed the creation of a tab and app and established a relationship between them. Then, we discussed different field data types available in Salesforce, page layout, and record type concepts. At last, we discussed the field-history-tracking concept.

In the next chapter, we will discuss the validation rule, formula field, workflow, and approval process concepts.

6

Automating a Business Process

In this chapter, we will discuss how you can improve and maintain data quality in Salesforce and streamline a business process in your organization. The following topics will be covered in this chapter:

- Improving data quality – the validation rule
- The formula field
- The Roll-up Summary field
- A letterhead
- An e-mail template
- Using a workflow to automate your work
- Monitoring a time-based workflow
- Streamlining your approval process – approval processes
- Various ways to approve a request – approval settings
- Stay-in-Touch

Improving the data quality – the validation rule

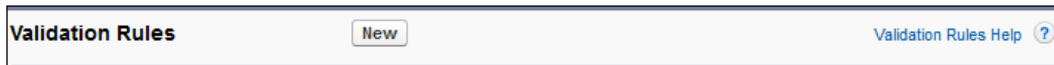
In order to make your data valid and healthy when entered by a user, it is very important that you impose some constraints over the values that are being entered into the system. This is to ensure that the user cannot enter any junk values or values that don't meet your business requirements.

Salesforce.com provides a feature called the validation rule. When you apply validation rules over fields of an object, it means that the data now entered by the user must meet the parameters that you decided with the validation rule. Validation rules in Salesforce are always defined in terms of formula expressions. If the formula evaluates to true, then an error message is displayed while the record is being saved, or the record is saved to the database. Validation rules are always evaluated while creating and updating a record. Using validation rules, you can ensure your business maintains a high degree of data quality and integrity.

Let's start with an example of an event organized by an event management firm, where there is a condition: the registrant's age must be at least 18 in order to register. For this scenario, we can impose a validation rule that will confirm this criterion.

In order to achieve this validation rule, follow these steps:

1. Navigate to **Setup | Build | Create | Objects**.
2. Click on the label of the object; in our case, click on **Event Registration**.
3. On the object definition page of the Event Registration object, you will find a section called **Validation Rules**.
4. Click on the **New** button as shown in the following screenshot:



5. It will redirect you to a validation rule edit page where you can create a validation rule. Now, enter *Age must be greater than or equals to 18* in the **Rule Name** field.
6. Select the **Active** checkbox to activate this validation rule. Enter the description so that other users can get an idea of why this validation rule is there.

7. Under **Error Condition Formula**, click on the **Insert Field** button, as shown in the following screenshot:

Event Registration Validation Rule Help for this Page ?

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit Save Save & New Cancel

Rule Name:

Active:

Description:

Quick Tips

- [Operators & Functions](#)

Error Condition Formula ! = Required Information

Example: [More Examples...](#)

Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

Functions

-- All Function Categories --

ABS
AND
BEGIN

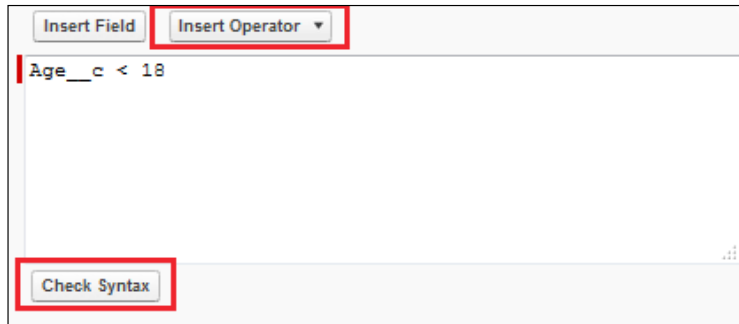
8. A window will pop up from where you can select the field that you want to use in your validation rule. Click on the **Insert** button to use it in the validation rule, as shown in the following screenshot:

Insert Field x

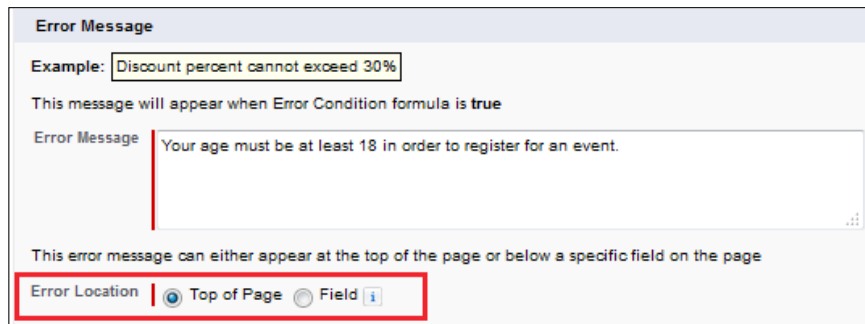
Select a field, then click Insert. Labels followed by a ">" indicate that there are more fields available.

Event Registration >	Address	You have selected: Age__c Type: Number API Name: Age__c
\$Label >	Age	
\$ObjectType >	Area of Interest	<input checked="" type="button" value="Insert"/>
\$Organization >	City	
\$Profile >	Country	
\$System >	Created By >	
\$User >	Created By ID	
\$UserRole >	Created Date	
	DOB	

9. Now, you can see the field's API name is present in the formula's input box; just add <18 and your formula expression will become something like `Age__c < 18`. To insert <, you can use the **Insert Operator** dropdown as shown in following screenshot:



10. You can check what syntax was used in your validation rule by clicking on the **Check Syntax** button.
11. Now, whenever this formula is evaluated to true, an error message will be displayed. To add an error message, navigate to the **Error Message** section, and in the **Error Message** field, enter Your age must be at least 18 in order to register for an event, as shown in the following screenshot:



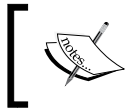
12. You can display the error message at two places:
 - At the top of the page
 - Below the field
13. In our case, select the top of the page.
14. Click on **Save**.



Salesforce fires the entire validation rule at the time a record is inserted or updated to make sure every detail entered is valid. If data is not valid, then the record is not saved. Any of the fields can be referenced to the validation rule; even if they are not available on the page layout, the validation rule would still fire and will result in an error message if the rule fails.

The following are a few important functions that you can use in a validation rule or a formula field:

Formula	Description
DATE	This returns a date value from the values entered by the user.
ISBLANK	This returns TRUE if the field is blank.
PRIORVALUE	This returns the previous value of a field.
ISPICKVAL	This returns TRUE if the value specified by you matches the value selected in the picklist.
VALUE	This converts the text into a number.
VLOOKUP	This is similar to Excel VLOOKUP and returns a value by looking up a related value on a custom object.
AND	This returns TRUE if both the conditions defined are met
BEGINS	This returns TRUE if the given field values begin with a given set of characters.
CONTAINS	This returns TRUE if the given field value contains the given set of characters.
ISNEW	This checks whether the record is newly created.
ISCHANGED	This returns TRUE if the new value is not equal to the older one.
LEFT	This returns the number of characters specified from the start of a string.
LEN	This returns the number of characters from the string.
LOWER	This converts the characters into lowercase from the specified string.
OR	This evaluates whether the expression is TRUE or FALSE. It returns TRUE if the expression is true, else it returns FALSE.
RIGHT	This returns the number of characters from the end of the string.
TEXT	This returns the value in text format from other formats such as date, percent, and picklist values.
TODAY	This returns today's date in a date format.
UPPER	This converts a string into uppercase.



For a complete list of formulas, you can refer to https://help.salesforce.com/HTViewHelpDoc?id=customize_functions.htm&language=en_US.

The Formula field

Formula fields in Salesforce are a special type of read-only fields that evaluate the specific equation at runtime and generate values accordingly. These fields are generally used where the data is entered by the user in a field and that data needs some logical processing and storage in another field. We need to define a formula expression/equation that will be executed while a record is being saved.

Let's start with an example. The event company Appiuss wants to calculate the age of the participants while they are registering for an event, depending on the date of birth the registrant entered at the time of registration. Additionally, they want to show it as a read-only field.

In order to fulfill this requirement, you can follow these steps:

1. Navigate to **Setup | Build | Create | Objects**.
2. Click on the label of the object; in our case, click on **Event Registration**.
3. Under the **Custom fields and relationships** section, click on the **New** button. It will redirect you to a new window from where you can select the **Formula** field, as shown in the following screenshot:

Data Type	
<input type="radio"/> None Selected	Select one of the data types below.
<input type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input checked="" type="radio"/> Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

- Click on **Next**. On the next screen, enter **Age** in the **Field Label** field; it will autopopulate the **Field Name** option based on the field label. You can change the field name as well. Under **Formula Return Type**, select **Number**, and under **Decimal Places**, select **0**, as shown in the following screenshot:

Field Label | Age | Field Name | Age

Formula Return Type

None Selected | Select one of the data types below.

Checkbox | Calculate a boolean value
Example: `{ TODAY() > CloseDate }`

Currency | Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `{ Gross Margin = Amount - Cost }_c`

Date | Calculate a date, for example, by adding or subtracting days to other dates.
Example: `{ Reminder Date = CloseDate - 7 }`

Date/Time | Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `{ Next = NOW() + 1 }`

Number | Calculate a numeric value.
Example: `{ Fahrenheit = 1.8 * Celsius__c + 32 }`

Percent | Calculate a percent and automatically add the percent sign to the number.
Example: `{ Discount = (Amount - Discounted_Amount__c) / Amount }`

Text | Create a text string, for example, by concatenating other text fields.
Example: `{ Full Name = LastName & ", " & FirstName }`

Options | **Decimal Places** 0 | Example: 999

- Click on the **Next** button. It will open a formula editor page where you can write a formula as per your requirement.
- Now, on the next screen, under the **Advanced Formula** tab, enter the formula expression `FLOOR ((TODAY () - DOB__c) / 365 . 2425)`, as shown in the following screenshot:

Formula Options

Formula Return Type | Number | Decimal Places | 0

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.
Example: `{ Fahrenheit = 1.8 * Celsius__c + 32 }` [More Examples...](#)

Simple Formula | **Advanced Formula**

Insert Field | Insert Operator

Name (Number) = `FLOOR ((TODAY () - DOB__c) / 365 . 2425)`

Functions
-- All Function Categories --
ABS
AND
BEGINS
BLANKVALUE
BR
CASE
Insert Selected Function



The **FLOOR** function rounds a number down towards zero to the nearest integer, and the **TODAY** function returns the current date.

7. Under the **Blank Field Handling** section, you can select the **What happen your formula reference** option to some number, currency, or percent field and their values are blank. There are two options that you can select as follows:
 - **Treat blank fields as zeroes**
 - **Treat blank fields as blanks**
8. Click on the **Next** button, select **Profile-level Visibility** for this formula field, and click on **Next**.
9. In the final window, you can add this field to the available page layouts and click on **Save**.
10. From the next time, whenever a user enters his or her date of birth in an event registration record, the formula field will automatically calculate the age.

The Roll-up Summary field

The Roll-up Summary field in Salesforce is a special type of field that is created on the master object so that we can show rolled-up data from child records to master records. Roll-up Summary fields in Salesforce can only be created on a master object when there is a master-detail relationship between two objects.

The Roll-up Summary field is only capable of calculating the following:

- **SUM**: This shows the sum of all the child records specific to the field on the master record
- **COUNT**: This shows the number of child records present on the master record
- **MIN**: This shows the minimum value of the child records on the master record
- **MAX**: This shows the maximum value of the child records on the master record

In our application, as we already discussed, we have a master-detail relationship between the `Sponsor` and `Booth Registration` objects. So, it is possible to create a Roll-up Summary field on the `Sponsor` object to count the number of booth registrations made by a specific `Sponsor` object. To do this, follow these steps:

1. Navigate to **Setup | Build | Create | Objects**.
2. Click on the label of object; in our case, click on **Sponsor**.
3. Under the **Custom fields and relationships** section, click on the **New** button. It will redirect you to a new window from where you can select the **Roll-Up Summary** field, as shown in the following screenshot:

Data Type	
<input type="radio"/> None Selected	Select one of the data types below.
<input type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
<input checked="" type="radio"/> Roll-Up Summary	A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

4. Click on the **Next** button, and enter data in **Field Label**, **Field Name**, **Description**, and **Help Text**, as shown in the following screenshot:


Field Label	<input type="text" value="Booths"/>	i
Field Name	<input type="text" value="Booths"/>	i
Description	<input type="text" value="Number of booths registered"/>	
Help Text	<input type="text"/>	

- Click on the **Next** button. Now select **Summarized Object**, in our case, **Booth Registrations**. Navigate to the **Roll-Up Type** section, select **COUNT**, and under the **Filter Criteria** section, select **All records should be included in the calculation**, as shown in the following screenshot:


The screenshot shows a configuration window titled "Select Object to Summarize". It has three main sections:

- Select Object to Summarize:** A dropdown menu for "Summarized Object" is set to "Booth Registrations".
- Select Roll-Up Type:** Radio buttons for "COUNT", "SUM", "MIN", and "MAX" are shown. "COUNT" is selected. A "Field to Aggregate" dropdown is set to "--None--".
- Filter Criteria:** Two radio buttons are shown: "All records should be included in the calculation" (selected) and "Only records meeting certain criteria should be included in the calculation".

- Click on **Next**. Select the profile-level visibility for this formula field and click on **Next**
- In the final window, you can add this field to the available page layouts and click on **Save**.

 You can create a maximum of 10 Roll-up Summary fields on any object by default. However, you may ask Salesforce support to increase it.

In the following screenshot, you can see that there are two booth registration records for the sponsor. **The Mart** and the **Booths** fields show the exact number:




Sponsor

S-0001

[Back to List: Sponsors](#)

Sponsor Detail

Sponsor ID	S-0001
Name	The Mart
Donation for Women Welfare	\$1,400
Type	Silver
Donation for Child Welfare	\$1,400
Booths	2
Created By	<u>Sagar Pareek</u> , 3/29/2014 7:52 PM



Booth Registrations

Action	Booth Registration: Booth Number
Edit Del	B-00001
Edit Del	B-00002

Letterhead

A letterhead is the banner at the top of a letter. The heading usually consists of a name and an address, a logo, and sometimes a background color. You can also design a letterhead in Salesforce; it will give you the same look and feel as that of an HTML e-mail template. Before you create a letterhead, you first need to have your logo in the document folder. The size should not be wider than 600 pixels, and the height should not be more than 200 pixels.

Uploading a file into the document folder

To upload your company logo in the document folder, follow these steps:

1. Click on the **Documents** tab and then click on the **New** button.
2. Enter data in **Document Name** and **Document Unique Name** will be autopopulated. Select the **Externally available image** checkbox and the destination folder where you want to save the image, then browse to the image and click on **Save**. You can see this in the following screenshot:

The screenshot shows a web form for uploading a document. It is divided into three main sections:

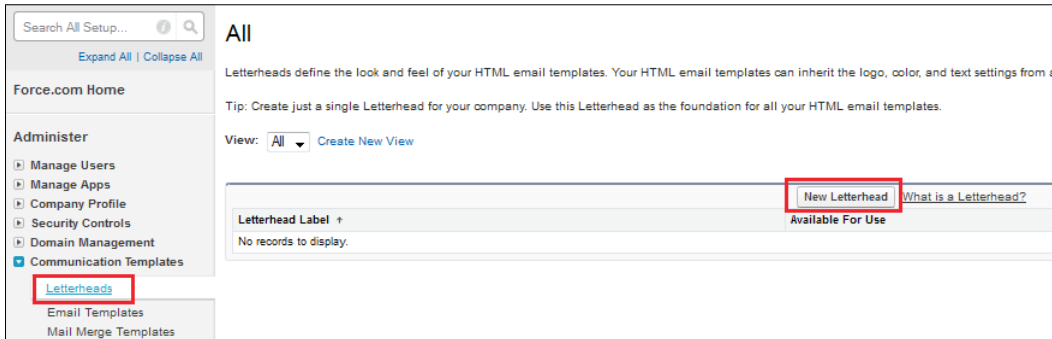
- 1. Enter details:** This section contains several input fields: 'Document Name' (filled with 'Appiuss Logo'), 'Document Unique Name' (filled with 'Appiuss_Logo'), 'Indicate Document is Internal' (checkbox), 'Externally Available Image' (checkbox, checked, and highlighted with a red box), 'Folder' (dropdown menu showing 'My Personal Documents'), 'Description' (text area with 'Appiuss logo'), and 'Keywords' (text field with 'Appiuss').
- 2. Select the File:** This section has two radio button options. The first is selected: 'Enter the path of the file or click browse to find the file.' Below it, 'File to upload' shows a 'Browse...' button and the filename 'Appiuss logo.png'. The second option is 'Create a reference link to the file. Enter a file location that others can access.' with a 'Path/URL to reference' text field.
- 3. Click the "Save" button:** This section contains a 'Save' button, which is highlighted with a red box.

At the bottom of the form, there is a note: 'Click the Cancel button to cancel an in-progress upload' and a 'Cancel' button.

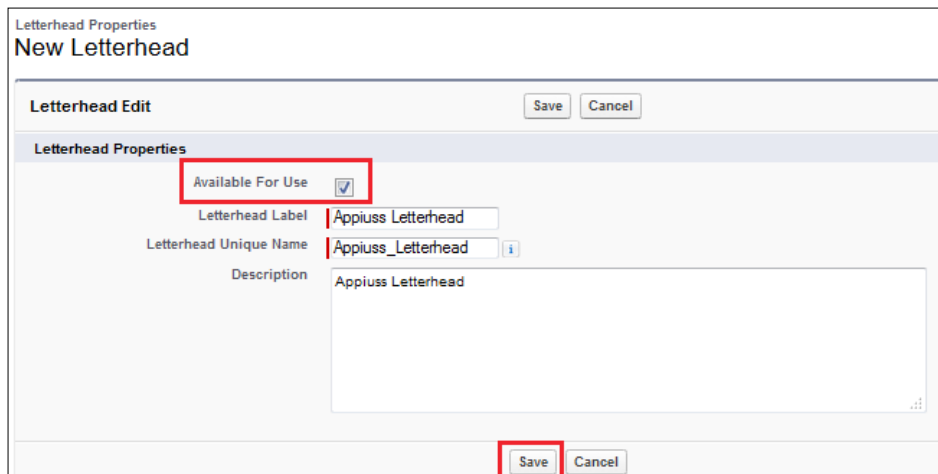
Creating a letterhead

Once your company logo is uploaded in Salesforce, we are good to go ahead and set up a letterhead for the company called Appiuss. To do this, follow these steps:


1. Navigate to **Setup | Administer | Communication templates | Letterheads**.
2. Click on the **New Letterhead** button as shown in the following screenshot:



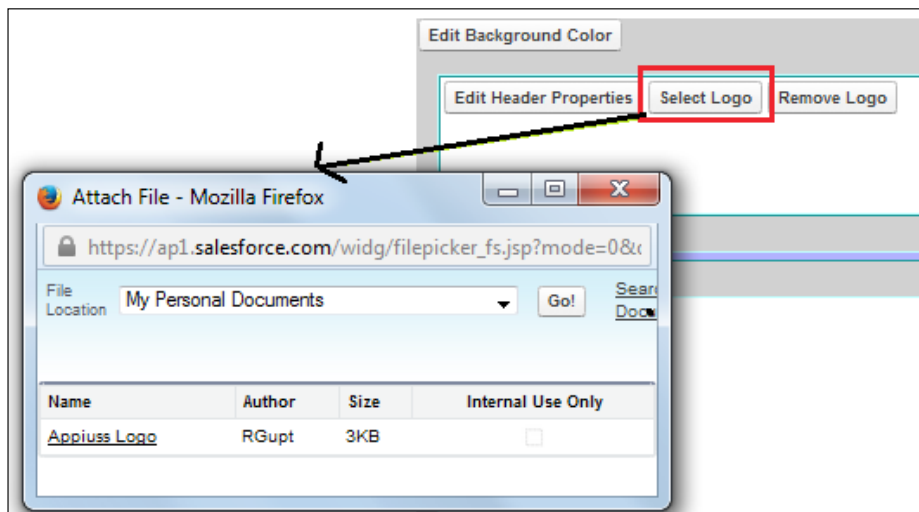
3. It will redirect you to the letterhead properties screen where you have to fill up the **Letterhead Label** and **Description** fields and select the **Available For Use** checkbox.



4. Click on **Save**. It will redirect you to a new screen where you can customize your letterhead.

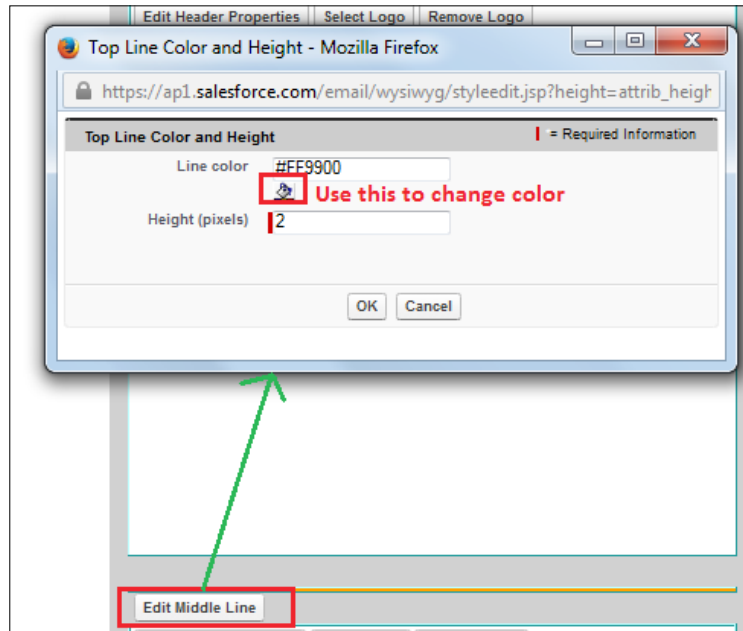
[ If the **Available for Use** checkbox is not selected, then you can't create an HTML e-mail that will use the letterhead.]

5. Click on the **Edit Background Color** button and choose a color for the background of your letterhead. Click the **Color Picker** button to choose a color.
6. Click on the **Select Logo** button to add a logo at the top of your letterhead, as shown in the following screenshot:

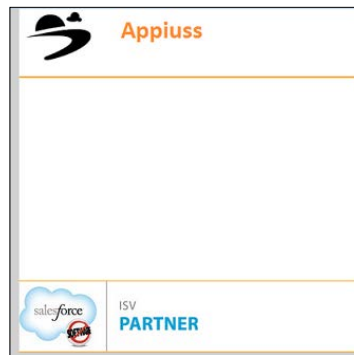


7. Likewise, you can add a logo at the bottom of your letterhead. Click on the **Remove Logo** button to delete the image from the letterhead.
8. Click on the **Edit Header Properties** button and choose the color, alignment, and height for the top section of the letterhead.

- To edit the line, click on the **Edit Top Line**, **Edit Middle Line**, and **Edit Bottom Line** buttons and change the values of **Line color** and **Height (pixels)**.



- To edit the color of the body of your letterhead, click on the **Edit body colors** button available in the letterhead. Click on the **Preview** button available on the letterhead properties page to get a preview of your letterhead. It will look like the following screenshot:



- Once you are done with the changes, click on the **Save** button.

An e-mail template

An e-mail template represents a template for an e-mail. E-mail templates are used with automated and non-automated e-mails sent from the Salesforce organization. Let's start with an example where the VP of marketing wants to get all the details of each participant who has registered for the event. To send all the details together, we have to create an e-mail template. An organization can use an e-mail template with the following mentioned features:

- Web-to-Lead
- Web-to-Case
- Email-to-Case
- An assignment rule
- An autoresponse rule
- The escalation rule

Types of e-mail templates

You can create four different types of e-mail templates in Salesforce. They are as follows:

- **Text:** All the users can customize text e-mail templates.
- **HTML with a letterhead:** Administrators and users with the **Edit HTML Templates** permission can create or customize these types of e-mail templates based on a letterhead.
- **Custom HTML:** Administrators and users with the **Edit HTML Templates** permission can create or customize these types of e-mail templates without using a letterhead.
- **Visualforce:** Administrators and developers can create or customize templates using Visualforce. Visualforce e-mail templates can be merged with a recipient's data in an advanced way, where the content of a template can contain information from multiple records.

Creating an e-mail template

To solve the preceding business requirement, we will create an HTML with a letterhead template. To do this, follow these steps:

1. Navigate to **Setup | Administer | Communication Templates | Email Templates**.

- Click on the **New Template** button, as shown in the following screenshot:

The screenshot shows the Force.com Setup interface for 'Unfiled Public Email Templates'. The left sidebar has 'Email Templates' highlighted with a red box. The main content area has a 'New Template' button highlighted with a red box. Below the button is a table of existing templates.

Action	Email Template Name ↑	Template Type	Available For
Edit Del	Contact: Follow Up (SAMPLE)	Text	✓
Edit Del	Customer Portal: Reset Password (SAMPLE)	Text	✓
Edit Del	Customer Portal: User Self-Registration Error (SAMPLE)	Text	✓
Edit Del	Customer Portal: New User Login Information (SAMPLE)	Text	✓

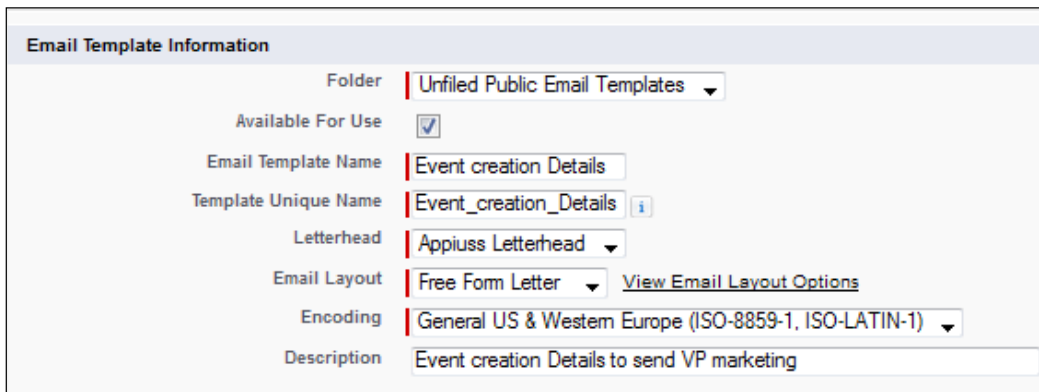
- Now select the **HTML (using Letterhead)** option as shown in the following screenshot and click on **Next**:

The screenshot shows the 'New Template' wizard. The 'HTML (using Letterhead)' radio button is selected and highlighted with a red box. The other options are 'Text', 'Custom (without using Letterhead)', and 'Visualforce'.

- Now enter the following details:
 - Folder:** Choose a folder where you want to store this e-mail template.
 - Available For Use:** Select the **Available For Use** checkbox if you would like to allow a user to use this template while setting up an e-mail notification for various features.
 - Email Template Name:** Enter the name of the e-mail template.

- **Template Unique Name:** This will be autopopulated based on the e-mail template name.
- **Letterhead:** Select the letterhead that we created.
- **Email Layout:** Select the e-mail layout. This controls the columns and page layout of the message text. Click on **View Email Layout Options** to see samples.
- **Encoding:** Select the **Encoding** setting to determine the character set for the template.
- **Description:** You can enter a short description so that other users will come to know why this e-mail template was created.

5. Once done, it will look like the following screenshot:



Email Template Information

Folder | Unfiled Public Email Templates

Available For Use

Email Template Name | Event creation Details

Template Unique Name | Event_creation_Details

Letterhead | Appiuss Letterhead

Email Layout | Free Form Letter [View Email Layout Options](#)

Encoding | General US & Western Europe (ISO-8859-1, ISO-LATIN-1)

Description | Event creation Details to send VP marketing

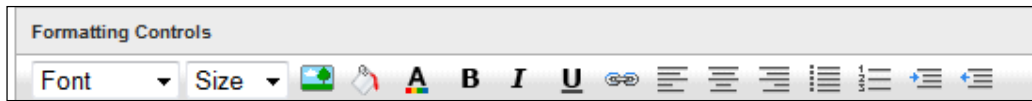
6. Click on the **Next** button. It will redirect you to the **HTML Email Template Edit** page where you can consider the following points:
- The subject will appear in the e-mail that will you send:



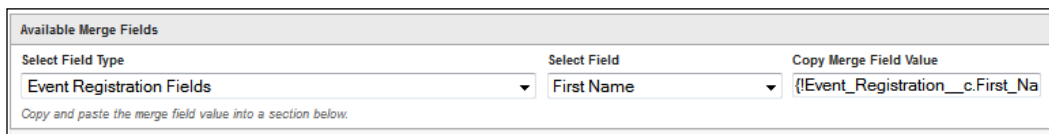
HTML Email Content

Subject | Participant registration details for {!Event_Registration__c.Name}

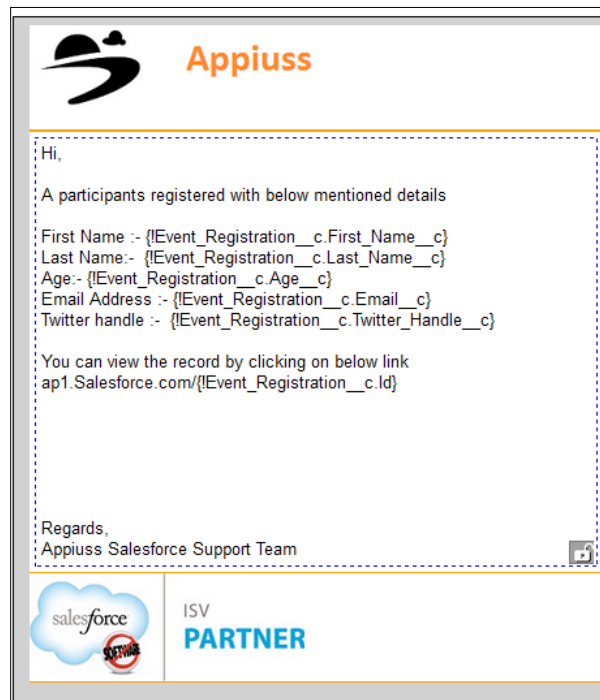
- Enter the text that needs to appear in the message that you will send. Click on the section and enter the message. You can change the style of your text by selecting the text and using the format toolbar, as shown in the following screenshot:



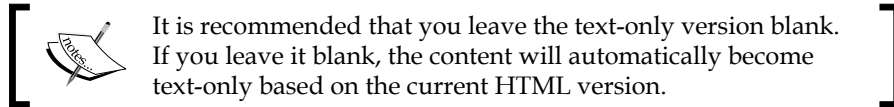
- You can also use merge fields in the template's subject and body. These fields will be replaced with the information filled in by the user during the event registration stage when you send an e-mail. Once you select the field under the available merge field, it will give you the merge field's value that you can copy and paste in the e-mail template.



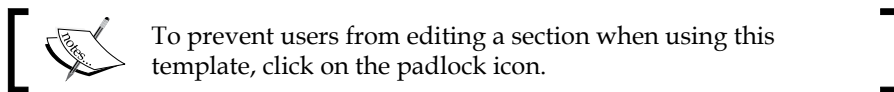
- Finally, our e-mail template will look like the following screenshot. You can add text as per your requirement or try to add a similar e-mail template:



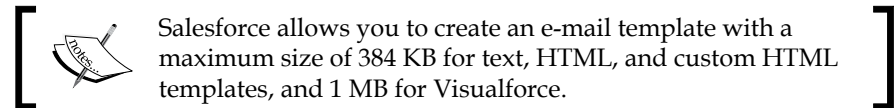
7. Click on **Next**. Optionally, you can enter the text-only version of your e-mail or click on the **Copy Text From HTML Version** button to automatically paste the text from your HTML version without the HTML tags. The text-only version is available to recipients who are unable to view HTML e-mails.



8. Finally, click on **Save**.



9. Optionally, you can click on the **Send test and verify merge fields** button to check the output of your e-mail template that you created.



Attaching a file with an e-mail template

You can also attach a file with your e-mail template. To add an attachment to the template, navigate to the **Attachments** list and click on the **Attached File** button, as shown in the following screenshot:



The attached file will always be included in every e-mail that uses this template. You can select a file from the document or upload a file from your computer. However, the limitation is that this file cannot be larger than 5 MB.

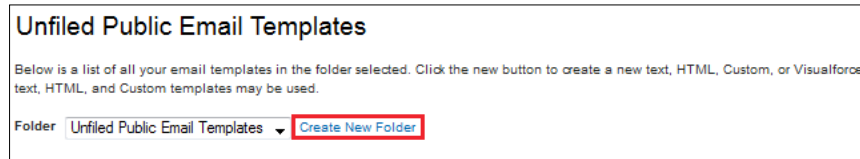
E-mail template's folder management

A folder is a good way to manage your several e-mail templates. It's a way to group all similar e-mail templates together so you can easily find them when you need them. It's also a great way to share e-mail templates with other users.

Creating an e-mail template folder

To create a folder for e-mail templates, follow these steps:

1. Navigate to **Setup | Administer | Communication Templates | Email Templates**.
2. Click on the **Create New Folder** link.



3. Enter data in **Email Template Folder Label** and **Folder Unique Name**. Select **Public Folder Access (Read Only or Read/Write)**, **Email Templates in this Folder**, and the sharing setting for a folder, as shown in the following screenshot:

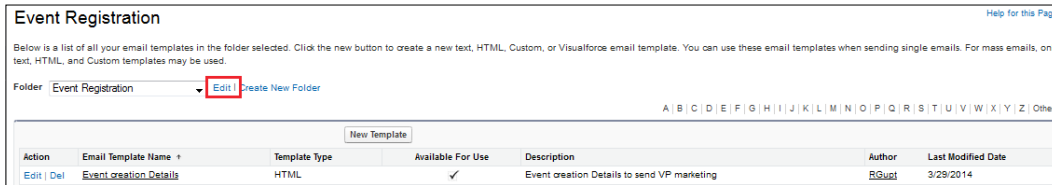
The screenshot shows the "New Email Template Folder" configuration form. At the top, there is a note: "Note: Templates must be Available For Use." Below this is the "Folder Edit" section with "Save" and "Cancel" buttons. The form contains the following fields and options:

- Email Template Folder Label:** Event Registration
- Folder Unique Name:** Event_Registration
- Public Folder Access:** Read/Write
- Unfiled Public Email Templates:** A list of templates including "Customer Portal: New User Login Information (SAMPLE)", "Leads: New assignment notification (SAMPLE)", "Leads: Web-to-Lead email response (SAMPLE)", "Marketing: Product Inquiry Response", "Sales: New Customer Email", "SUPPORT: New assignment notification (SAMPLE)", "SUPPORT: Self-Service New Comment Notification (SAMPLE)", "SUPPORT: Self-Service New User Login Information (SAMPLE)", "SUPPORT: Self-Service Reset Password (SAMPLE)", "SUPPORT: Web-to-Case email response (SAMPLE)", "Support: Case Assignment Notification", "Support: Case Created (Phone Inquiries)", "Support: Case Created (Web Inquiries)", and "SUPPORT: Case escalation notification (SAMPLE)".
- Email Templates in this Folder:** Event creation Details
- Sharing Options:**
 - This folder is accessible by all users
 - This folder is hidden from all users
 - This folder is accessible only by the following users:
- Search:** Public Groups for: Find
- Available for Sharing:** All Customer Portal Users, All Internal Users, Group: Account access
- Shared To:** --None--

4. Click on **Save**.

Deleting an e-mail template folder

To delete an e-mail template folder, click on the **Edit** link available next to the folder name.



Finally, click on the **Delete** button.

Using workflow to automate your work

A variety of business processes are included in your organization for day-to-day work. You can automate your organization's business process using Salesforce's workflows. You can use workflows to assign tasks, update fields, send an e-mail alert, and send an outbound message. A workflow is a powerful feature provided by Salesforce to automate your business process. Let's start with an example. Whenever a participant with an age of more than 18 years registers for an event, Appiuss would want the participant to perform certain actions. The actions are as follows:

1. Update the Twitter handle with Appiuss.
2. Assign a task to the user Sara Bareilles and set the due date 15 days after the record creation date.
3. Send an e-mail alert to VP marketing after two days of the record creation date.
4. There are two types of actions possible with workflow:
 - **Immediate workflow action:** This will fire as soon as the workflow meets the entry criteria
 - **Time-dependent workflow action:** This will fire relative to any date or date/time field on the object as specified in a time trigger; for example, 10 days after the opportunity creation date, you want to send an e-mail alert

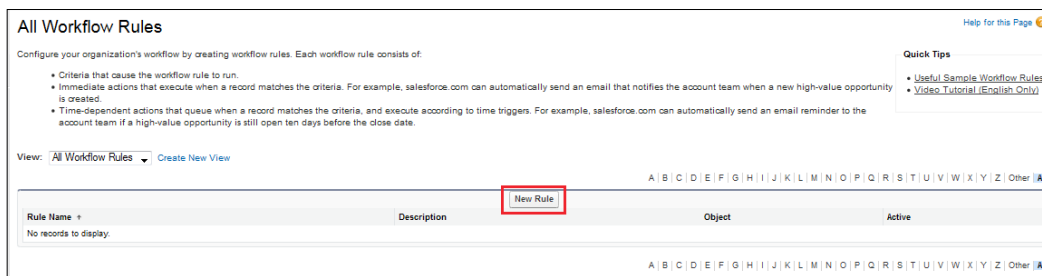
You can associate four actions with any of the following workflows:

- A field update
- An e-mail alert
- Task
- An outbound message

Creating a workflow rule

Now, we will create a workflow that will fulfill the preceding requirements. To do this, follow these steps:

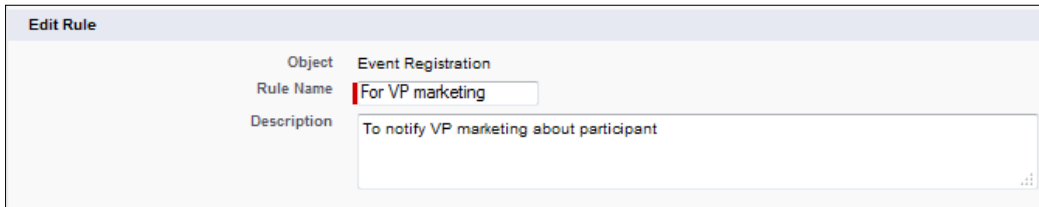
1. Navigate to **Setup | Build | Create | Workflow & Approvals | Workflow Rule**.
2. Click on the **New Rule** button as shown in the following screenshot:



3. Select the object for which you want to create a workflow rule. In our case, select the **Event Registration** object.




4. Click on **Next**. Under the **Edit Rule** section, enter data in **Rule Name** and **Description**, as shown in the following screenshot:



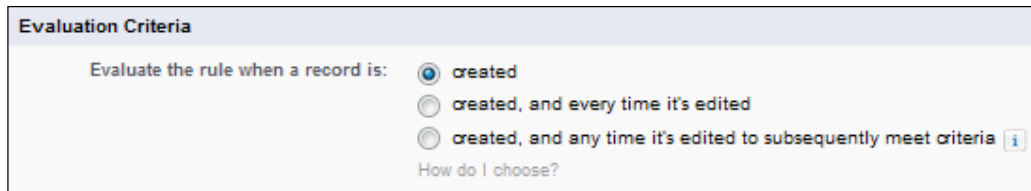
The screenshot shows a form titled "Edit Rule". It has three main fields: "Object" with the value "Event Registration", "Rule Name" with the value "For VP marketing", and "Description" with the value "To notify VP marketing about participant".

5. Under the **Evaluation Criteria** section, select a rule when this workflow fires; there are three options, as follows:
 - **Created:** If you select this option, the workflow will fire every time a record is created (if the rule criterion is met).
 - **Created, and every time it's edited:** If you select this option, the workflow will fire every time a record is created or updated (if the rule criterion is met).

 You cannot add time-dependent actions to the rule if you select this option.

- **Created, and any time it's edited to subsequently meet criteria:** If you select this option, it means the workflow will fire for a new record (if the rule criterion is met). For the updated record run, the rule is only valid if the record is altered from not meeting the rule criteria to meeting the rule criteria.

In our case, select the **created** option as shown in the following screenshot:



The screenshot shows the "Evaluation Criteria" section. It asks "Evaluate the rule when a record is:" and provides three radio button options: "created" (which is selected), "created, and every time it's edited", and "created, and any time it's edited to subsequently meet criteria" (with an information icon). Below the options is the text "How do I choose?".

6. Under the **Rule Criteria** section, select **Age greater than 18** as per the requirement.

Run this rule if the following criteria are met :

Field	Operator	Value	
Event Registration: Age	greater than	18	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Add Filter Logic...

7. You can also add a filter if you have more than one field in your rule criteria and want to change the logic.
8. Click on the **Save & Next** button.
9. Click on **Done**.

Field update

To create a new field update, follow these steps:

1. Navigate to **Setup | Build | Create | Workflow & Approvals | Workflow Rule | Field Updates**.
2. Click on the **New Field Update** button, as shown in the following screenshot:

All Workflow Field Updates Help for this Page

Field updates allow you to automatically change a field value to one that you specify. Field updates are actions associated with workflow rules and approval processes.

View: All Workflow Field Updates [Edit](#) [Create New View](#)

[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](#) [All](#)

Name +	Field to Update	Operation	Value	Last Modified Date
No records to display.				

[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](#) [All](#)

3. It will redirect you to a new window where you have to enter a few details, as follows:
 - **Name:** Enter a meaningful rule name.
 - **Unique Name:** This will be autopopulated based on the name. You can also define a unique name. The **Unique Name** field can contain only underscores and alphanumeric characters. It must be unique within the selected object type, begin with a letter, should not include any spaces, should not end with an underscore, and should not contain two consecutive underscores.

- **Description:** Enter a description.
- **Object & Fields to update:** Select the object and define the field update; in our case, the object is **Event Registration** and the field is **Twitter Handle**.
- **Re-evaluate Workflow Rules after Field Change:** Select this checkbox if you want the workflow rules on this object to be re-evaluated after the field value is updated.
- **Specify New Field Value:** Here, you can use a formula to set a new value or a blank value (null). In our case, select **set this field value to Appiuss**.

You can see this in the following screenshot:

Field Update Edit [Save] [Save & New] [Cancel]

Identification ! = Required Information

Name:

Unique Name: i

Description:

Object: Event Registration

Field to Update: Event Registration: Twitter Handle

Field Data Type: Text

Re-evaluate Workflow Rules after Field Change: i

Specify New Field Value

Text Options

A blank value (null)

Use a formula to set the new value

Show Formula Editor

Use **formula syntax**: e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7

[Save] [Save & New] [Cancel]

4. Click on **Save**.

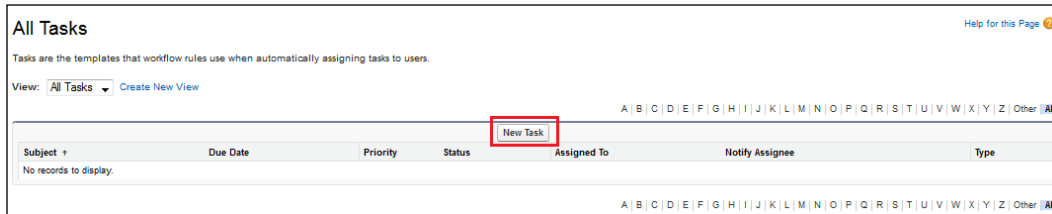


In the case of a master-detail relationship, you can update the master fields from the workflow.

Assigning a task

To add a task, follow these steps:

1. Navigate to **Setup | Build | Create | Workflow & Approvals | Workflow Rule | Tasks**.
2. Click on the **New Task** button, as shown in the following screenshot:



3. Select the object for which you want to create a task. In our case, select the **Event Registration** object and then click on **Next**.



If you are not getting the event registration field in the object's dropdown, then go to your custom object, edit it, and select the **Allow Activities** checkbox.

4. It will redirect you to a new window where you have to enter a few details as follows:
 - **Assigned To:** Select an assignee; an assignee can be a user, role, or record owner. In our case, it's the user, Sara Bareilles.
 - **Subject:** Enter a subject for the task.
 - **Unique Name:** Enter a unique name.
 - **Status:** Select the status of the task. In our case, the status will be **Not started**.
 - **Priority:** Select the priority of the task. In our case, select **Normal**.
 - **Due Date:** Select the due date. In our case, add 15 days after the record creation date.
 - **Notify assignee:** Select the **Notify Assignee** checkbox to send an e-mail notification when the task is assigned.
 - **Comments:** You can enter additional comments to the task.

Finally, it will look like the following screenshot:

New Task Help for this Page

Step 2 of 2: Configure Task Previous Save Cancel

Create a task to associate with one or more workflow rules, approval processes, or entitlement processes. When changing a task, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

Edit Task Required Information

Object: Event Registration Status: Not Started

Assigned To: Sara Barelles Priority: Normal

Subject: Please meet the particip

Unique Name: Please_meet_the_partic

Due Date: Event Registration: Created Date plus 15 days

Notify Assignee:

Description Information

Comments: Please meet the participant

5. Click on Save.

Creating an e-mail alert

To create an e-mail alert, follow these steps:

1. Navigate to **Setup | Build | Create | Workflow & Approvals | Workflow Rule | Email Alerts**.
2. Click on the **New Email Alert** button as shown in the following screenshot:

All Email Alerts Help for this Page

Email alerts are the emails that workflow rules send when triggered.

View: All Email Alerts Create New View

New Email Alert

Description	Email Template Name	Object	Last Modified Date
No records to display.			

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 All

3. It will redirect you to a new window where you have to enter a few details as follows:
 - o **Description:** Enter a description.
 - o **Unique Name:** This will be autopopulated based on the description. You can also define a unique name. The **Unique Name** field can contain only underscores and alphanumeric characters. It must be unique within the selected object type, begin with a letter, not include spaces, should not end with an underscore, and should not contain two consecutive underscores.

- **Object:** Select an object for which you want to set an e-mail alert. In our case, this will be **Event Registration**.
- **Email Template:** Select an e-mail template that you want to use for the e-mail alert. In our case, select the template **Event Creation Details** that we created while learning the e-mail template topic.
- **Recipient Type:** Select who should receive this e-mail alert. In our case, select **Role VP marketing**.
- **Additional Emails:** Enter up to five additional e-mail addresses.
- **From Email Address:** You can select the **From** e-mail address. There are two options for you: you can select the e-mail address of the default workflow user or the verified organization-wide address.

In our case, select the second option. Finally, it will look like the following screenshot:

Edit Email Alert

Description: New participant registration email alert

Unique Name: New_participant_registr...

Object: Event Registration

Email Template: Event creation Details

Recipient Type: Search: Role for: Find

Recipients

Available Recipients	Selected Recipients
Role: CEO	Role: VP Marketing
Role: Marketing Agents	
Role: Sales Reps	
Role: VP Sales	

Add Remove

You can enter up to five (5) email addresses to be notified.

Additional Emails: rakeshistom@gmail.com

From Email Address: "Appiuss" <rakeshistom@gmail.com>

Make this address the default From email address for this object's email alerts.

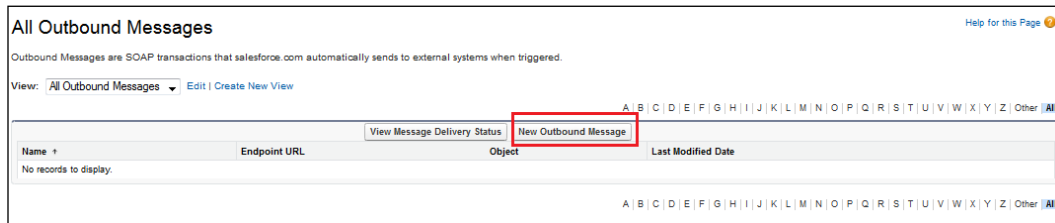
4. Click on **Save**.

Outbound messages

If your organization is maintaining the same event management setup in other systems as well and you want to send any changes that happen in Salesforce to another system, you can use this facility. Outbound messaging allows you to specify the changes to fields. Salesforce can cause messages with field values to be sent to designated external systems. To define outbound messages, the endpoint URL (where you want to send data) is required.

To create a new outbound message, follow these steps:

1. Navigate to **Setup | Build | Create | Workflow & Approvals | Workflow Rule | Outbound Message**.
2. Click on the **New Outbound Message** button as shown in the following screenshot:



3. Select the object for which you want to create an outbound message, click on **Next**, and enter the following details:
 - **Name:** Enter a meaningful rule name.
 - **Unique Name:** This will be autopopulated based on the name. You can also define the unique name. The **Unique Name** field can contain only underscores and alphanumeric characters. It must be unique within the selected object type, must begin with a letter, should not include spaces, not end with an underscore, and not contain two consecutive underscores.
 - **Description:** Enter a description.
 - **Endpoint URL:** Enter the endpoint URL where you want to send data.
 - **User to send as:** Select the user to use when sending the message. The selected user controls data visibility for the message that is sent to the endpoint.
 - **Send Session ID:** Select this if you want to send Salesforce's session ID with an outbound message.

4. Select the fields to include in the outbound message and click on **Add**.
5. Click on **Save**.

Relating all the actions with the workflow

Now we have to relate all the actions that we have gone through (field update, task, and e-mail alert) with our workflow. To do this, follow these steps:

1. Navigate to **Setup | Build | Create | Workflow & Approvals | Workflow Rule**.
2. Click on the workflow name **For VP marketing** that we created.

Action	Rule Name	Description	Object	Active
Edit Del Activate	For VP marketing	To notify VP marketing about participant	Event Registration	<input type="checkbox"/>

3. Navigate to the **Workflow Actions** section and click on **Edit**, as shown in the following screenshot:

Workflow Rule
For VP marketing
[Back to List: Workflow Rules](#)

Workflow Rule Detail [Edit](#) [Delete](#) [Clone](#) [Activate](#)

Rule Name	For VP marketing	Object	Event Registration
Active	<input type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created
Description	To notify VP marketing about participant		
Rule Criteria	Event Registration: Age GREATER THAN 18		
Created By	Rakesh Gupta, 3/30/2014 10:22 AM	Modified By	Rakesh Gupta, 3/30/2014 10:22 AM

Workflow Actions [Edit](#)

Immediate Workflow Actions

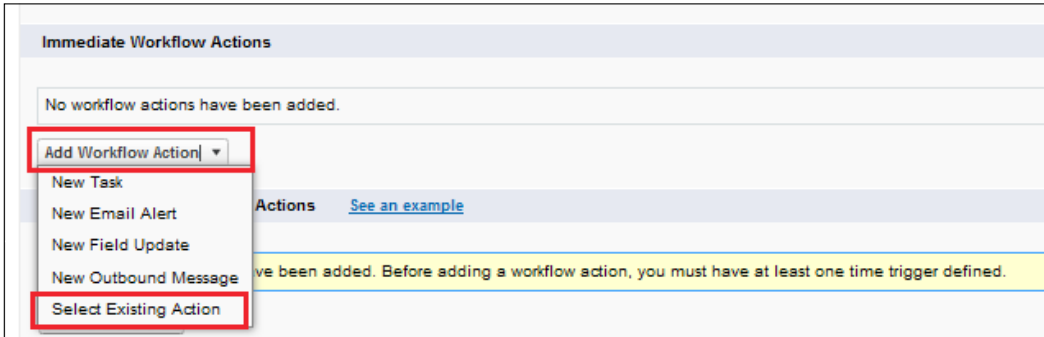
No workflow actions have been added.

Time-Dependent Workflow Actions [See an example](#)

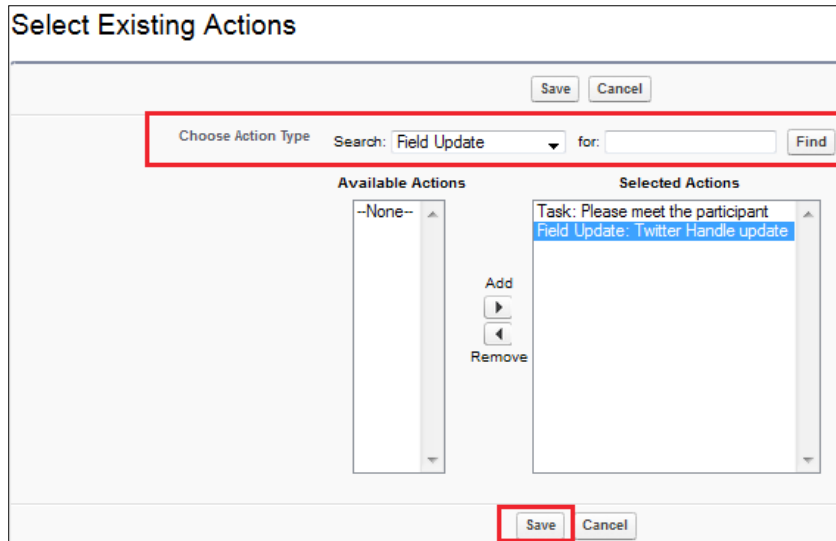
No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

[Edit](#)

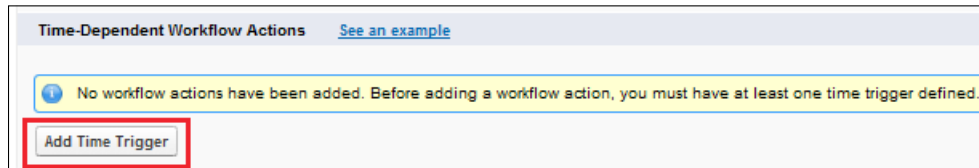
- To add immediate workflow actions, click on the **Add Workflow Action** dropdown and **Select Existing Action** under the immediate workflow action section, as shown in the following screenshot:



- Add a task and field update that we created and click on **Save**. Use the dropdown to select **Task**, **Email Alert**, and **Field Update**:



6. Now add **Time-Dependent Workflow Actions**. Click on the **Add Time Trigger** button under the **Time-Dependent Workflow Actions** section, as shown in the following screenshot:



7. On the next screen, set the time interval for when the action should be fired. In our case, set **2 Days After Event Registration Date** and click on **Save**.

Add Time Trigger
Event Registration

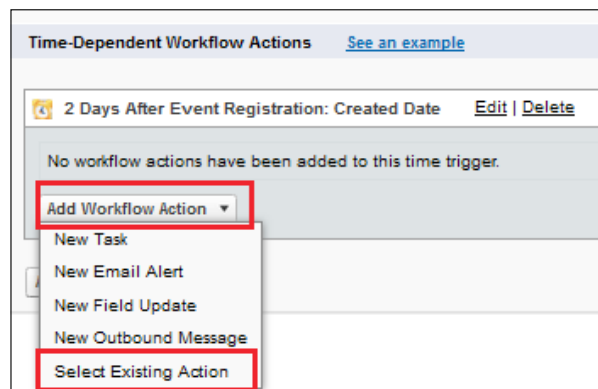
Workflow Time Trigger Edit

Workflow Rule For VP marketing

2 Days After Event Registration: Created Date

Save Cancel

8. To add a time-based workflow action, navigate to the **Time-Dependent Workflow Action** section, click on the **Add Workflow Action** dropdown, and **Select Existing Action** under the immediate workflow action section, as shown in the following screenshot:



9. Enter the e-mail alert that we created under the e-mail alert topic and click on **Save**.

Select Existing Actions

Save Cancel

Choose Action Type Search: Email Alert for: Find

Available Actions Selected Actions

--None-- Email Alert: New participant registration email alert

Add Remove

Save Cancel

10. We are all set to go. Click on the **Done** button available at the top-right corner of the page. Finally, it will look like the following screenshot:

; Description: To notify VP marketing about participant; Evaluation Criteria: Evaluate the rule when a record is created; Rule Criteria: Event Registration: Age GREATER THAN 18; Created By: Rakesh Gupta, 3/30/2014 10:22 AM; Modified By: Rakesh Gupta, 3/30/2014 10:22 AM. The 'Workflow Actions' section has an 'Edit' button. Under 'Immediate Workflow Actions', there are three items: Type: Task, Description: Please meet the participant; Type: Field Update, Description: Twitter Handle update. Under 'Time-Dependent Workflow Actions', there is one item: 2 Days After Event Registration: Created Date, Type: Email Alert, Description: New participant registration email alert."/>

Workflow Rule

For VP marketing

Back to List: Workflow Rules

Workflow Rule Detail Edit Delete Clone Activate

Rule Name For VP marketing Object Event Registration

Active Evaluation Criteria Evaluate the rule when a record is created

Description To notify VP marketing about participant

Rule Criteria Event Registration: Age GREATER THAN 18

Created By Rakesh Gupta, 3/30/2014 10:22 AM Modified By Rakesh Gupta, 3/30/2014 10:22 AM

Workflow Actions Edit

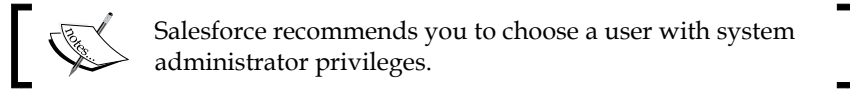
Immediate Workflow Actions

Type	Description
Task	Please meet the participant
Field Update	Twitter Handle update

Time-Dependent Workflow Actions See an example

2 Days After Event Registration: Created Date	
Type	Description
Email Alert	New participant registration email alert


11. Click on the **Activate** button to activate this workflow. You will move to a new screen, **Workflow & Approvals Settings**, if you don't specify **Default Workflow User**. Here, you can specify the default workflow user and then click on **Save**. The workflow will now be activated.



Limitations of the workflow

The workflow feature is only available in Enterprise, Unlimited, Performance, and Developer editions. For the Professional Edition, you can enable this feature after paying an extra amount. As Salesforce is based on a multitenant architecture, it imposes a few limitations on the workflow:

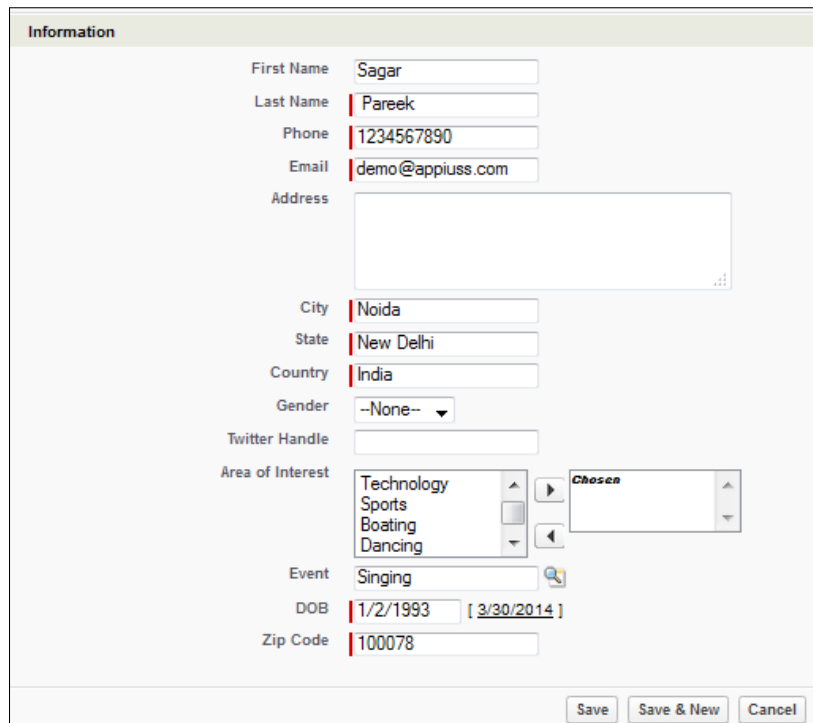
- For each workflow rule, you can have the following:
 - 10 time triggers
 - 40 immediate actions
 - 40 time-dependent actions per time trigger
- For both immediate and time-dependent actions in one workflow rule, there can be no more than:
 - 10 email alerts
 - 10 tasks
 - 10 field updates
 - 10 outbound messages
- The workflow time trigger per hour limit for different editions are as follows:
 - **Professional Edition:** 250
 - **Enterprise Edition:** 500
 - **Developer Edition:** 50
 - **Unlimited and Professional Edition:** 1,000
- The workflow e-mail limit per day is as follows:
 - 1,000 per Salesforce standard license
 - 200,000 per organization

 Once an organization's daily e-mail limit of 200,000 exceeds, Salesforce will send a warning e-mail to the default workflow user and discard all the e-mails. Salesforce does not try to resend them later.

Monitoring a time-based workflow

You can monitor time-based workflows that are present in the queue to be processed and may cancel them if required.

Create a new record via the event registration form where the age needs to be greater than 18 to fire our workflow, as shown in the following screenshot:



The screenshot shows a form titled "Information" with the following fields and values:

- First Name: Sagar
- Last Name: Pareek
- Phone: 1234567890
- Email: demo@appiuss.com
- Address: (Empty text area)
- City: Noida
- State: New Delhi
- Country: India
- Gender: --None--
- Twitter Handle: (Empty text area)
- Area of Interest: A list box containing Technology, Sports, Boating, and Dancing. A "Chosen" list box is also visible.
- Event: Singing
- DOB: 1/2/1993 [3/30/2014]
- Zip Code: 100078

At the bottom right of the form are three buttons: Save, Save & New, and Cancel.

You can check whether the Twitter handle field is autoupdated with the word Appiuss and a task is assigned to the user, as shown in the following screenshot:

The screenshot shows a user profile form with the following details:

- Twitter Handle: Appiuss (highlighted in red)
- Area of Interest: Singing
- Event: Singing
- DOB: 1/2/1993
- Age: 21
- Zip Code: 100,078
- Created By: Rakesh Gupta, 3/30/2014 12:40 PM
- Last Modified By: Rakesh Gupta, 3/30/2014 12:40 PM

Buttons: Edit, Delete, Clone

Approval History | Submit for Approval | Approval History Help (?)

No records to display

Open Activities | New Task | New Event | Open Activities Help (?)

Action	Subject	Name	Task	Due Date	Status	Priority	Assigned To
Edit Cls	Please meet the participant		✓	4/14/2014	Not Started	Normal	Sara Baresilles

Managing a time-based workflow

To monitor a time-based workflow, follow these steps:

1. Navigate to **Setup | Monitor | Time-Based Workflow**.
2. Click on the **Search** button. It will list down all the time-based actions that are placed in the workflow queue.

The screenshot shows the "Time-Based Workflow" monitoring interface. It includes a search filter section and a table of workflow rules.

When salesforce.com triggers a workflow rule, its time-dependent actions are placed in the workflow queue. Use the criteria below to monitor the queue.

Filter criteria: --None-- AND --None-- AND --None-- AND --None-- AND --None--

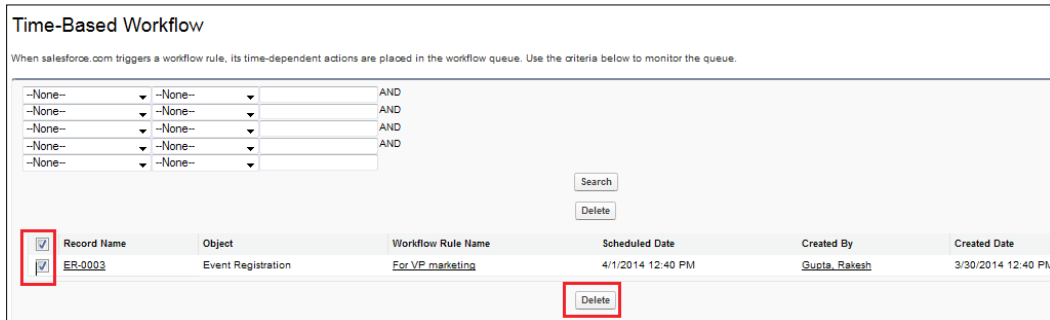
Buttons: Search (highlighted in red), Delete

Record Name	Object	Workflow Rule Name	Scheduled Date	Created By	Created Date
ER-0003	Event Registration	For VP marketing	4/1/2014 12:40 PM	Gupta, Rakesh	3/30/2014 12:40 PM

Buttons: Delete

Deleting a time-based workflow

To delete an action from the queue, select the concerned action and click on the **Delete** button, as shown in the following screenshot:



Streamlining your approval process – approval processes

An approval process in Salesforce is an automated process for your organization that can be used to approve records in Salesforce. Here, you can specify what happens when records are approved or rejected based on your business requirements. Once you implement an approval process, your business can run more efficiently. Similar to the workflow rule of sending an e-mail alert or field update, or assigning a task based on the requirement, an approval process will take care of your business one step ahead. With this, you can define the sequence of steps that are essential to be approved for a record.

Let's start with an example. Whenever any NGO registers for a booth for any event, it must be first approved by the VP marketing (Sagar Pareek) and then CEO (Rakesh Gupta) of Appiuss and the record creator can submit the record for approval; once the record is approved or rejected, the picklist value will be updated at the approval stage.

The wizard to create the approval process

Salesforce provides two types of wizards as follows:

- **Jump Start Wizard:** This wizard is used to create a simple approval process or one-step approval process. This wizard allows you to quickly create an approval process where everything will be available on the same screen; you do not have to move from one screen to another.

- **Standard Wizard:** This wizard is used to create complex approval processes. It consists of certain setup wizards that allow you to define your process, and another particular setup wizard that allows you to define each step in the process.

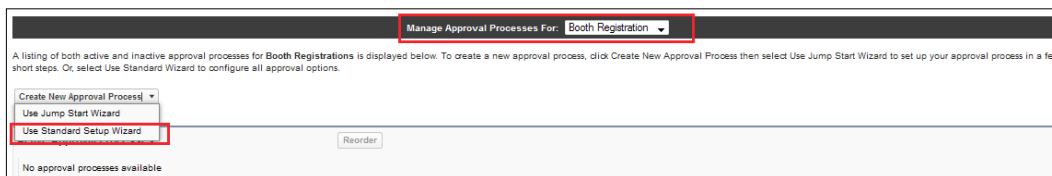
In this book, we will use a standard wizard to create an approval process. Before we create an approval process, create one picklist and an approval status field for the Booth registration object with the following details:

Field type	Label	Length/Values	Type
Picklist	Approval Status	<ul style="list-style-type: none"> • Submit for approval • Approved by VP • Rejected by VP • Approved • Rejected 	Read only

Creating a new approval process

Now, we will create an approval process to solve the preceding business requirement. To do this, follow these steps:

1. Navigate to **Setup | Build | Create | Workflow & Approvals | Approval Processes**.
2. From the **Manage Approval Processes For** dropdown, select the **Booth Registration** object.
3. Click on the **Create new approval process** dropdown and select **Use Standard Setup Wizard**, as shown in the following screenshot:



4. In the next screen, enter data in **Process Name**, **Unique Name**, and **Description**. Then click on **Next**.

Step 1. Enter Name and Description Step 1 of 6

Enter a name and description for your new approval process.

Enter Name and Description ! Required Information

Process Name

Unique Name

Description

Next Cancel

5. In the next screen, specify the entry criteria. In our case, select **Booth Registration Record Type equals to NGO** and click on **Next**, as shown in the following screenshot:

Step 2. Specify Entry Criteria Step 2 of 6

If only certain types of records should enter this approval process, enter that criteria below. For example, only expense reports from employees at headquarters should use this approval process.

Specify Entry Criteria

Use this approval process if the following criteria are met :

Field	Operator	Value	
Booth Registration: Record Type	equals	NGO	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

Add Filter Logic...

Previous Next Cancel

6. In the next screen, you have to perform the following two tasks:
 - Select a field that will be used for automated approval routing. When we define an approval process, we can assign approval requests to different users. One option is to use a user field to automatically route these requests. The user field can be any custom hierarchical relationship field such as **Account Manager** or the **Manager Standard** user field. In our case, let it be the one that is set by default.
 - Record properties that can be edited. Once the record is submitted for an approval, the record gets locked so a normal user can't edit the record data. Here, you can define who can edit the record when the record is in between the approval process. Selecting **Administrators ONLY** will allow a user to edit records during the approval process stage.

7. Click on **Next**. You can see this in the following screenshot:

Step 3. Specify Approver Field and Record Editability Properties Step 3 of 6

When you define approval steps, you can assign approval requests to different users. One of your options is to use a user field to automatically route these requests. If you want to use this option for any of your approval steps, select a field from the picklist below. Also, when a record is in the approval process, it will always be locked—only an administrator will be able to edit it. However, you may choose to also allow the currently assigned approver to edit the record.

Select Field Used for Automated Approval Routing

Next Automated Approver Determined By: None

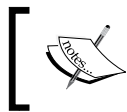
Use Approver Field of Sponsor Owner:

Record Editability Properties

Administrators **ONLY** can edit records during the approval process.

Administrators **OR** the currently assigned approver can edit records during the approval process.

Previous Next Cancel



If you leave the **Next Automated Approver Determined By** field blank, you can't automatically assign approval requests to the manager in any step you create for this approval process.

8. When an approval process assigns an approval request to a user, Salesforce automatically sends an e-mail notification to the user that contains a link to the approval page in Salesforce. If you want to use your custom e-mail template, then choose a template or leave the field blank so Salesforce can use the default e-mail template. Then, click on **Next**.

Step 4. Select Notification Templates Step 4 of 6

Select the email template that will be used to notify approvers that an approval request has been assigned to them. Note that this template will be used for all steps for this process. [Create a new email template](#)

Email Template

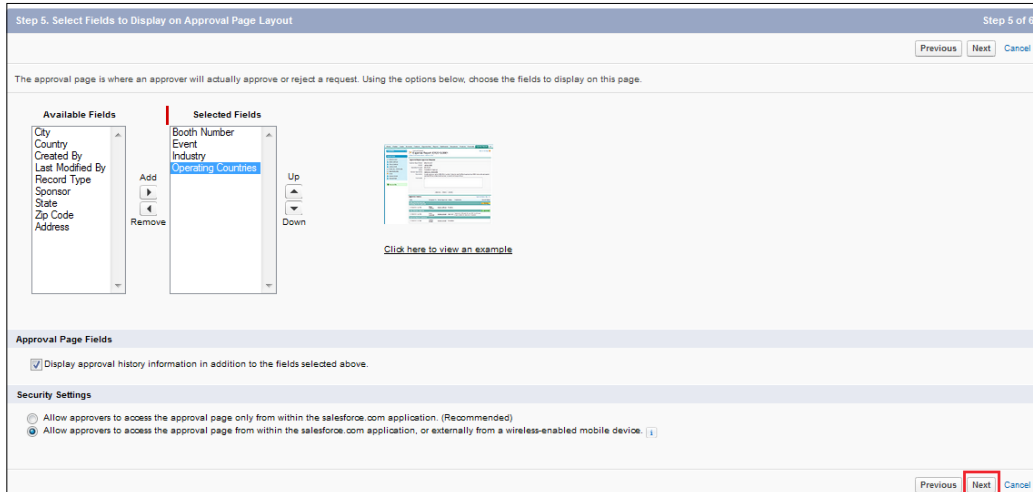
Approval Assignment Email Template:


Previous Next Cancel

9. In the next screen, the **Select Fields to Display on Approval Page Layout** field does the following tasks:

- Select the field that you want to show on an approval request page.
- Select the **Display approval history information in addition to the fields selected above** checkbox to include the approval history list on the approval request page, which includes fields such as **Date**, **Assigned To**, **Actual Approver**, and **Comments**.
- Under the **Security Settings** section, select the option from where a user can approve or reject a request. In our case, select **Allow approvers to access the approval page from within the salesforce.com application, or externally from a wireless-enabled mobile device**.

10. Then, click on **Next**. You can see this in the following screenshot:



 Here, we are allowing users to approve a request from within the Salesforce.com application or externally from a wireless-enabled mobile device; some users will not be able to create any approval steps that allow users to manually choose who the approver should be.

11. In the **Specify Initial Submitters** screen, select the following things:

- Select the submitter type. In our case, select **Record Creator**.
- Select all the **Booth Registration page layouts** checkboxes in the **Add the Approval History** list to add the list related to approval history to all the booth registration page layouts.
- Optionally, you can select the **Allow submitters to recall approval requests** checkbox. It will allow the submitter to recall the approval process.

12. Click on **Save**. You can see this in the following screenshot:

Step 6. Specify Initial Submitters

Using the options below, specify which users are allowed to submit the initial request for approval. For example, expense reports should normally be submitted for approval only by their owners.

Initial Submitters

Submitter Type Search: Creator for: Find

Available Submitters: -None-

Allowed Submitters: Record Creator

Add Remove

Approval History on Page Layouts

Add the Approval History related list to all Booth Registration page layouts

Submission Settings

Allow submitters to recall approval requests

Previous Save Cancel

13. In the next screen, select the **No, I'll do this later, take me back to the listing of all approval processes for this object** option, and you will move to the approval process page. It will look like the following screenshot:

Process Definition Detail Edit Clone Delete View Diagram

Process Name: NGO Booth Registration Approval Active [i](#)

Unique Name: NGO_Booth_Registration_Approval Next Automated Approver Determined By

Description: NGO Booth Registration Approval

Entry Criteria: Booth Registration: Record Type EQUALS NGO

Record Editability: Administrator ONLY Allow Submitters to Recall Approval Requests

Approval Assignment Email Template

Initial Submitters: Record Creator

Created By: Rakesh Gupta, 3/30/2014 6:40 PM Modified By: Rakesh Gupta, 3/30/2014 6:40 PM

Initial Submission Actions Add Existing Add New

Action	Type	Description
	Record Lock	Lock the record from being edited

Approval Steps New Approval Step

X You have not yet defined any approval steps

Final Approval Actions Add Existing Add New

Action	Type	Description
Edit	Record Lock	Lock the record from being edited

Final Rejection Actions Add Existing Add New

Action	Type	Description
Edit	Record Lock	Unlock the record for editing

Recall Actions Add Existing Add New

Action	Type	Description
	Record Lock	Unlock the record for editing

Final approval actions

A final approval action occurs only when a record has received all the required approvals. In our case, navigate to the **Final Approval Actions** section, click on the **Edit** link, select **Unlock the record for editing** as shown in the following screenshot, and then click on **Save**.

NGO Booth Registration Approval
Final Approval Record Lock

Save Cancel

Choose Final Approval Record Locking Behavior

Lock the record from being edited

Unlock the record for editing

Save Cancel

You can also add some actions such as a field update email alert and an outbound message, or add existing actions as per your business needs.

Final rejection actions

A final rejection action occurs only when a record has been completely rejected from the approval process. In our case, it is **Unlock the record for editing**; leave it as is, as shown in in the following screenshot:

Final Rejection Actions

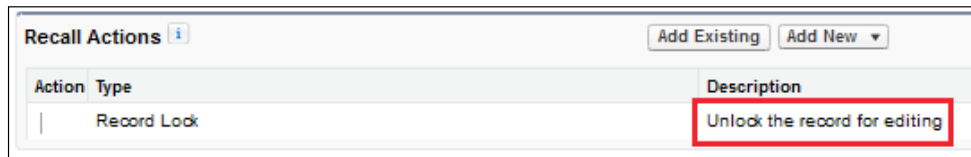
Add Existing Add New

Action Type	Description
Edit Record Lock	Unlock the record for editing

If you want to change this behavior, click on the **Edit** link and select the available option. You can also add some actions such as a field update e-mail alert and an outbound message, or add existing actions as per your business needs.

Recall actions

A recall action occurs only when a submitted approval request is recalled. Once a recall action happens, it will unlock the record to edit, as shown in the following screenshot:

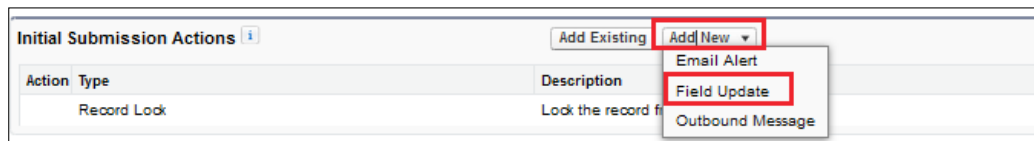


You can also add some actions such as a field update e-mail alert and an outbound message, or add existing actions as per your business needs.

Initial submission actions

An initial action occurs only when a record is initially submitted for approval. It will lock the record from being edited; this means that no one can edit the record except the one who has the permission to do so, as per the options that you selected while setting up the approval process. You can also add some actions such as a field update e-mail alert and an outbound message, or add existing actions as per your business needs. We will update our approval status field to submit at the approval stage. To do this, follow these steps:

1. Navigate to the **Initial Submission Actions** section, click on **Add New** from the drop-down list, and select **Field Update**, as shown in the following screenshot:



2. This field update works similar to the one that we created in the workflow rule. Enter data in **Name**, **Unique Name**, and **Description**. Select **Field to Update (Approval Status)** under the **Specify New Field Value** section, the **A specific value** option from the dropdown, the **Submit for approval** option, and click on **Save**, as shown in the following screenshot:

The screenshot shows the 'Edit Field Update' interface for 'Update approval status'. The page title is 'Update approval status' with a 'Help for this Page' link. Below the title is a descriptive paragraph: 'Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.' The main form is titled 'Field Update Edit' and includes 'Save', 'Save & New', and 'Cancel' buttons. The 'Identification' section contains fields for 'Name' (Update approval status), 'Unique Name' (Update_approval_stab), and 'Description'. Below these are 'Object' (Booth Registration), 'Field to Update' (Booth Registration: Approval Status), 'Field Data Type' (Picklist), and a checkbox for 'Re-evaluate Workflow Rules after Field Change'. The 'Specify New Field Value' section has 'Picklist Options' with three radio buttons: 'The value above the current one', 'The value below the current one', and 'A specific value'. The 'A specific value' option is selected, and a dropdown menu shows 'Submit for approval'. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

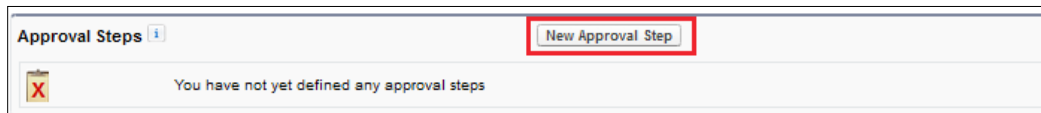
Approval steps

Now, we will add approval steps as per our requirement. First, VP marketing (Sagar Pareek) and then the CEO (Rakesh Gupta) of Appiuss must approve the record.

Approval step 1

In the first step, an approval from VP marketing Sagar Pareek is required. To do this, follow these steps:

1. Navigate to the **Approval Steps** section and click on the **New Approval Step** button, as shown in the following screenshot:



2. In the next screen, enter data in **Name**, **Unique Name**, **Description**, and **Step Number** and click on **Next**.

The screenshot displays 'Step 1. Enter Name and Description' (Step 1 of 3). The form contains the following fields:

- Approval Process Name: NGO Booth Registration Approval
- Name: Approval from VP Sagar Pareek
- Unique Name: Approval_from_VP_Sagar_Pareek
- Description: Approval from VP Sagar Pareek
- Step Number: 1

 A 'Next' button is highlighted with a red box at the bottom right of the form.

3. In the next screen, you can filter out records. It means here you can decide which records should be entered in this approval step, for example, NGO records where city equals to New York. In our case, select **All records should enter this step** and click on **Next**, as shown in the following screenshot:

The screenshot displays 'Step 2. Specify Step Criteria' (Step 2 of 3). The form includes a radio button selection for 'Specify Step Criteria':

- All records should enter this step.
- Enter this step if the following criteria are met, else approve record.

 The 'All records should enter this step' option is highlighted with a red box. 'Previous', 'Next', and 'Cancel' buttons are visible at the bottom.

4. In the next screen, you can specify the approver. There are a few possibilities that are as follows:
 - **Let the submitter choose the approver manually:** You can allow the submitter to choose to approve records manually. However, the thing to remember is this option will not be shown if you select the **Allow approvers to access the approval** page from within the Salesforce.com application, or externally from a wireless-enabled mobile device.
 - **Automatically assign an approval to a queue:** You can autoassign an approval request to a queue that belongs to the Booth Registration object.
 - **Automatically assign a request to an approver(s):** You can autoassign an approval request to multiple users by selecting this option. You can select the user, queue, or related user. You can send an approver request to a maximum of 25 approvers. In this case, you have two options; they are as follows:
 - **Approve or reject a request based on the FIRST response:** The first response to the approval request determines whether the record is approved or rejected.
 - **Require a UNANIMOUS approval from all the selected approvers:** The record is only approved if all of the approvers approve the request. The approval request is rejected if any of the approvers reject the request.
5. In our case, select **Automatically assign to approver(s)**, then the user **Sagar Pareek**, and click on **Save**.

Step 3. Select Assigned Approver Step 3 of 3

Specify the user who should approve records that enter this step. Optionally, choose whether the approver's delegate is also allowed to approve these requests.

Select Approver

Automatically assign to queue.

Automatically assign to approver(s).

User

[Add Row](#) [Remove Row](#)

When multiple approvers are selected:

Approve or reject based on the FIRST response.

Require UNANIMOUS approval from all selected approvers.

The approver's delegate may also approve this request.

- In the next screen, select the **No, I'll do this later, take me back to the listing of all approval processes for this object** option and you will be taken back to the approval process detail page.

Approval step 2

Now we will create the second step where an approval from the CEO, Rakesh Gupta is required. To do this, follow these steps:

- Navigate to the **Approval Steps** section and click on the **New Approval Step** button, as shown in the following screenshot:

Approval Steps ⌵						
Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit Del	1	Approval from VP Sagar Pareek			User:Sagar Pareek	Final Rejection

- In the next screen, enter data in **Name**, **Unique Name**, **Description**, and **Step Number** and click on **Next**.

Step 1. Enter Name and Description
Step 1 of 3

Enter a name, description, and step number for your new approval step.

Previous Approval Step Information

Step Number: 1

Name: Approval from VP Sagar Pareek

Criteria:

Assign To: User : Sagar Pareek

Enter Name and Description ! = Required Information

Approval Process Name: NGO Booth Registration Approval

Name:

Unique Name:

Description:

Step Number:

3. In the next screen, you can filter out records. It means you can decide which records should be entered in this approval step, for example, NGO records where city equals to New York. In our case, select **All records should enter this step** and click on **Next**.
4. In the next screen, select the user **Rakesh Gupta**, and also select **Reject Behavior** (what happens when approval request is rejected by the user Rakesh Gupta). Select the **Perform all rejection actions for this step AND all final rejection actions. (Final Rejection)** option and then click on **Save**, as shown in the following screenshot:

The screenshot displays the 'Step 3. Select Assigned Approver' configuration interface. At the top, it indicates 'Step 3 of 3' and includes 'Previous', 'Save', and 'Cancel' buttons. Below the title, a description states: 'Specify the user who should approve records that enter this step. Optionally, choose whether the approver's delegate is also allowed to approve these requests.' A table titled 'Previous Approval Step Information' shows details for Step 1: 'Step Number: 1', 'Name: Approval from VP Sagar Pareek', 'Criteria:', and 'Assign To: User : Sagar Pareek'. The 'Select Approver' section has two radio buttons: 'Automatically assign to queue.' (unselected) and 'Automatically assign to approver(s)' (selected and highlighted with a red box). Below this, a dropdown menu shows 'User' and 'Rakesh Gupta' (highlighted with a red box). There are also links for 'Add Row' and 'Remove Row'. Under 'When multiple approvers are selected', there are two radio buttons: 'Approve or reject based on the FIRST response.' (selected) and 'Require UNANIMOUS approval from all selected approvers.' (unselected). A checkbox for 'The approver's delegate may also approve this request.' is also present. The 'Reject Behavior' section asks 'What should happen if the approver rejects this request?' and has two radio buttons: 'Perform all rejection actions for this step AND all final rejection actions. (Final Rejection)' (selected and highlighted with a red box) and 'Perform ONLY the rejection actions for this step and send the approval request back to the most recent approver. (Go Back 1 Step)' (unselected). At the bottom right, 'Previous', 'Save' (highlighted with a red box), and 'Cancel' buttons are visible.

5. In the next screen, select the **No, I'll do this later, take me back to the listing of all approval processes for this object** option and you will be taken back to the approval process detail page.



For both Enterprise and Unlimited editions, there is a limit of 15 steps per process.

Adding an action to step 1

In every step, you can add two types of actions, which are as follows:

- Approval actions
- Rejection actions

To add an action to step 1, follow these steps:

1. To add actions to each step, navigate to **Approval Steps** and click on the **Show Actions** link available in front of step 1.

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit Del	1	Approval from VP Sagar Pareek			User:Sagar Pareek	Final Rejection
Show Actions Edit Del	2	Approval from CEO Rakesh Gupta	Approval from CEO Rakesh Gupta		User:Rakesh Gupta	Final Rejection

2. It will open a small window where you can add actions for an approval or rejection. Move to the **Approval Actions** section, click on the **Add New** dropdown, and select **Field Update**.

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Hide Actions Edit Del	1	Approval from VP Sagar Pareek			User:Sagar Pareek	Final Rejection
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Approval Actions Add Existing Add New</p> <p>You have not yet defined any actions</p> <p style="text-align: right;"> <input type="button" value="Add Existing"/> <input type="button" value="Add New"/> </p> </div>						
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Rejection Actions Add Existing Add New</p> <p>You have not yet defined any actions</p> <p style="text-align: right;"> <input type="button" value="Add Existing"/> <input type="button" value="Add New"/> </p> </div>						
Show Actions Edit Del	2	Approval from CEO Rakesh Gupta	Approval from CEO Rakesh Gupta		User:Rakesh Gupta	Final Rejection

3. It will redirect you to a new window where you have to enter data in **Name**, **Unique Name**, and **Description**. Select **Field to Update (Approval Status)** and under the **Specify New Field Value** section, select the **A specific value** option. From the drop-down list, select **Approved by VP marketing** and click on **Save**, as shown in the following screenshot:

Save Save & New Cancel

Field Update Edit

Identification

Name: Approved by VP marketi

Unique Name: /sved_by_VP_marketing

Description: Approved by VP

Object: Booth Registration

Field to Update: Booth Registration: Approval Status

Field Data Type: Picklist

Re-evaluate Workflow Rules after Field Change:

Specify New Field Value

Picklist Options

The value above the current one
 The value below the current one
 A specific value: Approved by VP marketing

Save Save & New Cancel

- Likewise, you can add the rejection action and update the **Booth Registration** object and the approval status field with the value **Reject by VP marketing**, as shown in the following screenshot:

Adding an action to step 2

Now you can add action to step 2 as follows:

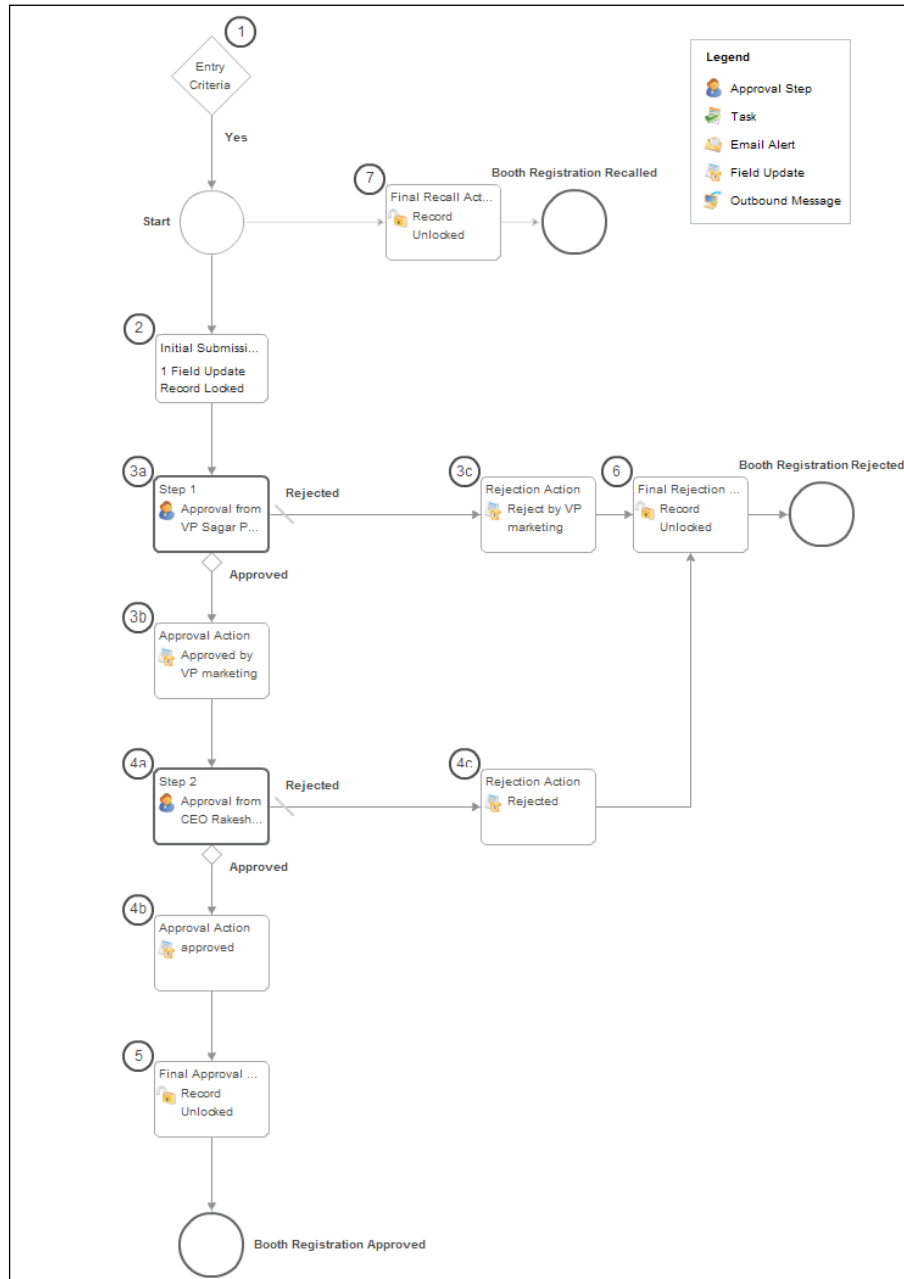
- In an approval action, you can update the Booth Registration object's approval status field with the value **Approved**
- In a rejection action, you can update the Booth Registration object's approval status field with the value **Rejected**

Finally, it will look like the following screenshot:

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior						
<p>Approval Steps 1 New Approval Step</p> <p>Approval from VP Sagar Pareek</p> <p>User: Sagar Pareek</p> <p>Final Rejection</p>												
<p>Approval Actions Add Existing Add New</p> <table border="1"> <thead> <tr> <th>Action</th> <th>Type</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Edit Remove</td> <td>Field Update</td> <td>Approved by VP marketing</td> </tr> </tbody> </table>							Action	Type	Description	Edit Remove	Field Update	Approved by VP marketing
Action	Type	Description										
Edit Remove	Field Update	Approved by VP marketing										
<p>Rejection Actions Add Existing Add New</p> <table border="1"> <thead> <tr> <th>Action</th> <th>Type</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Edit Remove</td> <td>Field Update</td> <td>Reject by VP marketing</td> </tr> </tbody> </table>							Action	Type	Description	Edit Remove	Field Update	Reject by VP marketing
Action	Type	Description										
Edit Remove	Field Update	Reject by VP marketing										
<p>Approval from CEO Rakesh Gupta</p> <p>User: Rakesh Gupta</p> <p>Final Rejection</p>												
<p>Approval Actions Add Existing Add New</p> <table border="1"> <thead> <tr> <th>Action</th> <th>Type</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Edit Remove</td> <td>Field Update</td> <td>approved</td> </tr> </tbody> </table>							Action	Type	Description	Edit Remove	Field Update	approved
Action	Type	Description										
Edit Remove	Field Update	approved										
<p>Rejection Actions Add Existing Add New</p> <table border="1"> <thead> <tr> <th>Action</th> <th>Type</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Edit Remove</td> <td>Field Update</td> <td>Rejected</td> </tr> </tbody> </table>							Action	Type	Description	Edit Remove	Field Update	Rejected
Action	Type	Description										
Edit Remove	Field Update	Rejected										

Viewing the process diagram

To view the process diagram of an approval process we created, you can click on **View Diagram**. It will open another window where you can view the process diagram:



Activating the approval process

To activate the approval process, click on the **Activate** button available at the top of the page, as shown in the following screenshot:

The screenshot shows the configuration page for an approval process. At the top, there are buttons for 'Edit', 'Clone', 'Delete', 'Activate', and 'View Diagram'. The 'Activate' button is highlighted with a red box. Below these buttons is a table with the following details:

Process Name	NGO Booth Registration Approval	Active	<input type="checkbox"/>
Unique Name	NGO_Booth_Registration_Approval	Next Automated Approver Determined By	
Description	NGO Booth Registration Approval		
Entry Criteria	Booth Registration: Record Type EQUALS NGO		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input checked="" type="checkbox"/>
Approval Assignment Email Template			
Initial Submitters	Record Creator	Created By	Rakesh Gupta, 3/30/2014 6:40 PM
		Modified By	Rakesh Gupta, 3/31/2014 8:50 PM

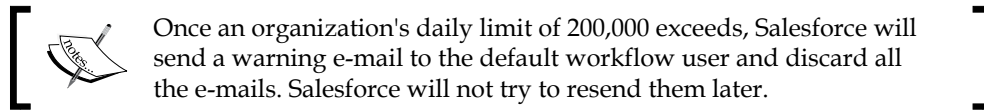
Below the table is the 'Initial Submission Actions' section, which includes a table with the following actions:

Action	Type	Description
	Record Lock	Lock the record from being edited
Edit Remove	Field Update	Update approval status

Limitations of the approval process

Approval processes are available on Enterprise, Unlimited, Performance, and Developer editions. For the Professional Edition, you can enable this feature by paying an extra amount. As Salesforce is based on a multitenant architecture, it imposes a few limitations on the approval process:

- For each approval process, you can have a maximum of the following:
 - 30 steps per process
 - 25 approvers per step
- Each organization can have the following limitations:
 - 300 approval processes per object
 - 1,000 approval processes per organization
- An approval process's e-mail limit per day is as follows:
 - 1,000 per Salesforce standard license
 - 200,000 per organization



You cannot delete active approval processes. If you want to delete them, you will first have to inactivate the approval process and make sure no records have been submitted for approval. If any records have been submitted, delete them and remove them from the recycle bin.

Once an approval process is activated, you cannot add, delete, or change the order of the steps or change the reject or skip compartment of that process, even if you make the process inactive.

Various ways to approve a request – approval settings

You can approve records in Salesforce by three ways, which are follows:

- Via a UI
- Through a wireless-enabled mobile device
- Via Salesforce Chatter (we will discuss this in *Chapter 7, Concepts of Data Management*)

For the approval settings, follow these steps:

1. First, we will submit any Booth Registration record that belongs to an NGO for approval. To submit a record for an approval process, go to the record detail page and navigate to the **Approval History** list and click on the **Submit for Approval** button, as shown in the following screenshot:



2. A warning window will pop up. Click on **OK**. Now our record is submitted for approval. As per our setting, the approval status is changed to **Submit for Approval**, and it will trigger an e-mail to Sagar Pareek for approval.


Booth Registration Detail Unlock Record Edit Delete Clone

Booth Number: B-00001
 Address: NRSW
 Record Type: NGO [Change]
 City: BKB
 State: BKB
 Country: BKB
 Zip Code: 38,740
 Industry: Women Welfare
 Operating Countries: India
 Sponsor: S-0001
 Event: Singing
 Approval Status: **Submit for approval**
 Created By: Sagar Pareek 3/29/2014 7:52 PM
 Last Modified By: Rakesh Gupta 3/31/2014 9:27 PM

Unlock Record Edit Delete Clone

Approval History Recall Approval Request Approval History Help ?

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Approval from VP Sagar Pareek (Pending for first approval)						
Reassign / Approve / Reject	3/31/2014 9:27 PM	Pending	Sagar Pareek	Sagar Pareek		Pending
Approval Request Submitted	3/31/2014 9:27 PM	Submitted	Rakesh Gupta	Rakesh Gupta		


[

Users who have modified all the data permissions for an object can also submit a record for approval, and they can approve or reject a record from an approval process as well.

]

3. To approve or reject records, click on the **Approve/Reject** link. If you want to reassign an approval request to someone else, click on the reassign link. Clicking on the **Approve/Reject** link will redirect you to a new window. You can add a comment to the box and click on the **Approve** or **Reject** button, as shown in the following screenshot:

Approval Request Help for this Page ?

Booth Registration: B-00001
[Back to Booth Registration: B-00001](#)

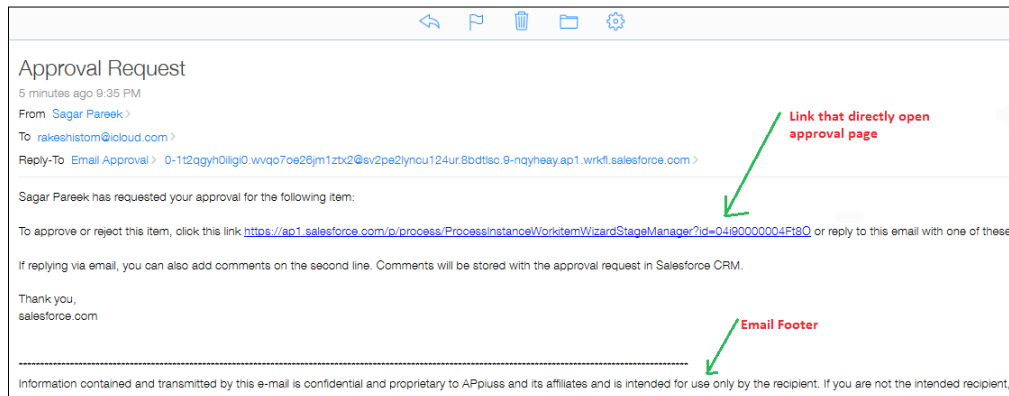
Approve/Reject Approval Request

Booth Number: B-00001
 Event: Singing
 Industry: Women Welfare
 Operating Countries: India
 Comments: Good to go

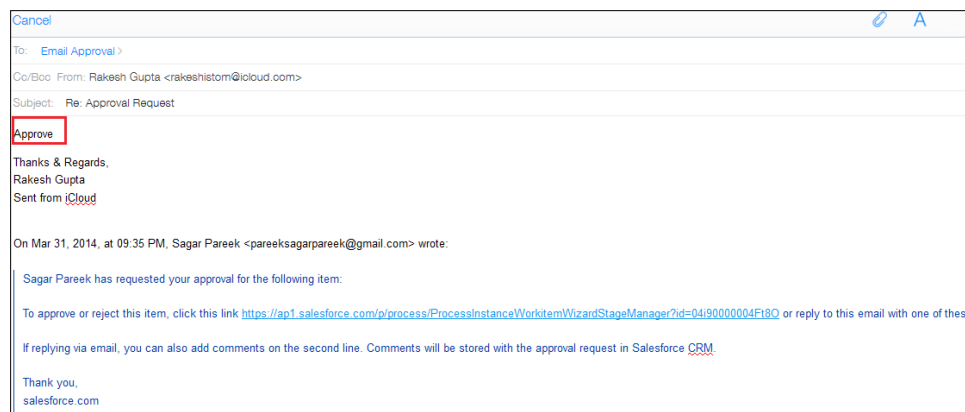
Approval History Approval History Help ?

Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Approval from VP Sagar Pareek (Pending for first approval)					
3/31/2014 9:27 PM	Pending	Sagar Pareek	Sagar Pareek		Pending
Approval Request Submitted	Submitted	Rakesh Gupta	Rakesh Gupta		

- This page is called the **Approval Request** page. In this page, you can see the approval history section that appears while setting up the approval process. We will select the **Display approval history information in addition to the fields selected above** checkbox. As soon as the user Sagar Pareek approves the request for step 1, Salesforce will trigger an e-mail alert to proceed on to the next step (step 2 in our case), that is, to obtain approval from the user Rakesh Gupta:



- To approve or reject records via an e-mail, click on **Reply** and use the following keywords in the body of your e-mail for approval or rejection as per your choice:
 - Approval:** Yes, approve or approved
 - Rejection:** No, reject or rejected
- In our case, the user Rakesh Gupta will reply to the e-mail with the **Approve** keyword, as shown in the following screenshot:



- If you mark the record as **Approved**, the approval status field value will then be changed to approved.

Booth Registration
B-00001

[Back to List: Users](#)

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

[Approval History \(3\)](#)

Booth Registration Detail [Edit](#) [Delete](#) [Clone](#)


Booth Number	B-00001
Address	NRSW
Record Type	NGO Change
City	BKB
State	BKB
Country	BKB
Zip Code	38,740
Industry	Women Welfare
Operating Countries	India
Sponsor	S-0001
Event	Singing
Approval Status	Approved
Created By	Sagar Pareek, 3/29/2014 7:52 PM

Last Modified By [Rakesh Gupta](#), 3/31/2014 9:51 PM

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

Approval History [Submit for Approval](#) [Approval History Help](#)

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Approval from CEO Rakesh Gupta						
	3/31/2014 9:51 PM	Approved	Rakesh Gupta	Rakesh Gupta		Approved
Step: Approval from VP Sagar Pareek						
	3/31/2014 9:35 PM	Approved	Sagar Pareek	Sagar Pareek	Good to go	Approved
Approval Request Submitted						
	3/31/2014 9:27 PM	Submitted	Rakesh Gupta	Rakesh Gupta		


[

Approval request comments are restricted to 4,000 characters.
In Chinese, Japanese, or Korean, the limit is 1,333 characters.

]

Stay-in-Touch

What do we do to obtain our client's latest contact information? We simply ask them to send us the latest details after a certain period; usually, we e-mail them to get this information. It's a tedious task to write an individual e-mail to every client/contact. Salesforce provides a better way to ask your clients to stay in touch with you. You can simply use a single e-mail format, and with a click of a button, you can directly send an e-mail to your contact and get the latest information. This functionality of Salesforce is known as Stay-in-Touch.

Stay-in-Touch settings

To make use of this functionality, follow these steps:

1. Navigate to **Your Name | My Settings | Email | My Stay-in-Touch Settings**.
2. It will open a window where you can create a few settings, as follows:
 - **Automatic Bcc:** If you select this option, then you will receive copies of your sent Stay-in-Touch e-mails. This option is only available if your organization has not enabled compliant Bcc e-mails.
 - **A reminder for New Contacts:** If you select this option, it will prompt a Stay-in-Touch request window whenever you save a new contact.
 - **The default Stay-in-Touch Subject:** From here, you can change the default Stay-in-Touch subject.
 - **The default Stay-in-Touch Note:** Here, you can enter a message to the recipient. You can also use a merge field. To use a merge field, navigate to the **Available Merge Fields** section available at the top of the page and select **Fields Copy Merge Field Value** from **Copy Merge Field Value** box and use it.
 - **The default Stay-in-Touch Signature:** Here, you can enter a signature with your contact information.
3. Click on **Save**. It will look like the following screenshot:

The screenshot shows the 'My Stay-in-Touch Settings' configuration window. At the top, there is a section for 'Available Merge Fields' with a search bar and a 'Copy Merge Field Value' button. Below this, a red error message reads: 'Error: Invalid Data. Review all error messages below to correct your data.' The main settings area includes:

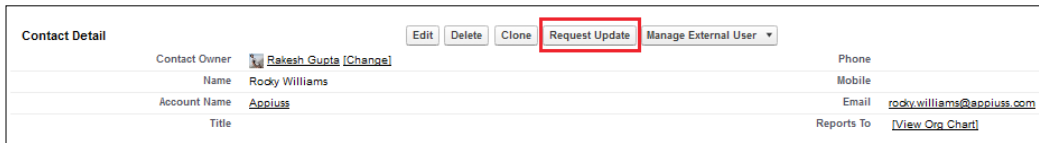
- 'Automatic Bcc' with radio buttons for 'Yes' (selected) and 'No'.
- 'Reminder for New Contacts' with radio buttons for 'Yes' (selected) and 'No'.
- 'Default Stay-in-Touch Subject' with a text field containing 'Staying in touch from {Contact_FirstName}'.
- 'Default Stay-in-Touch Note' with a text area containing a message that uses a merge field: 'I'm updating my address book and want to make sure I have your contact information so we can stay in touch. Can you take a look at the info I have for you below and let me know if it's out of date?'.
- 'Default Stay-in-Touch Signature' with a text area containing 'Regards, Rakesh Gupta' and a red error message 'You must enter a value'.

 At the bottom, there are 'Save' and 'Cancel' buttons.

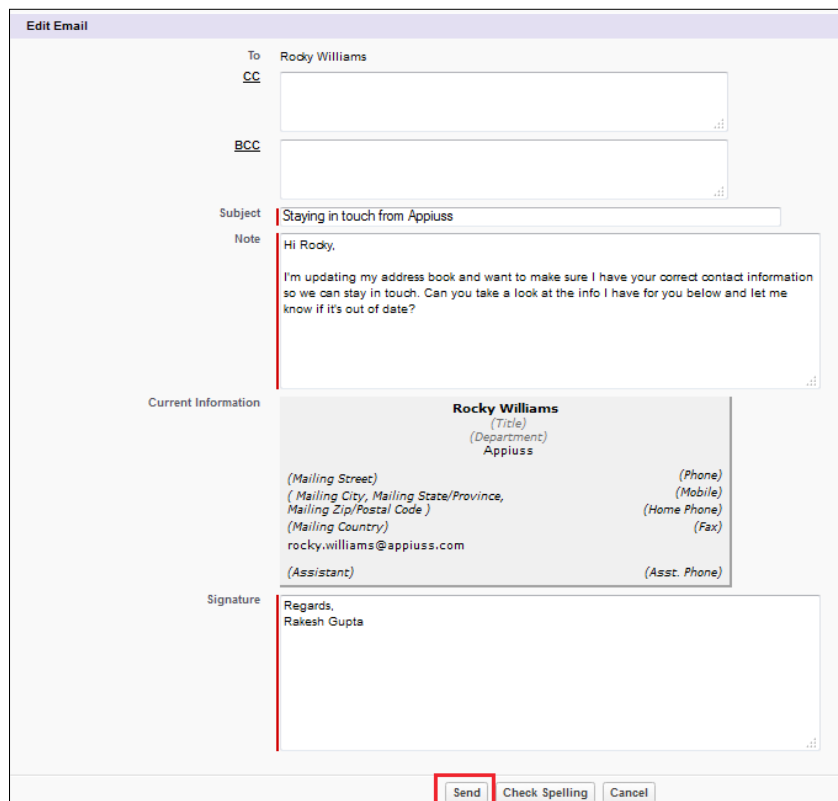
A request update

To send a request update to any contact, navigate to the **Contact** tab and go to the **Contact Detail** page of the person you want to send the request to. In our case, we want to send request update information to the contact, Rocky Williams. To do this, follow these steps:

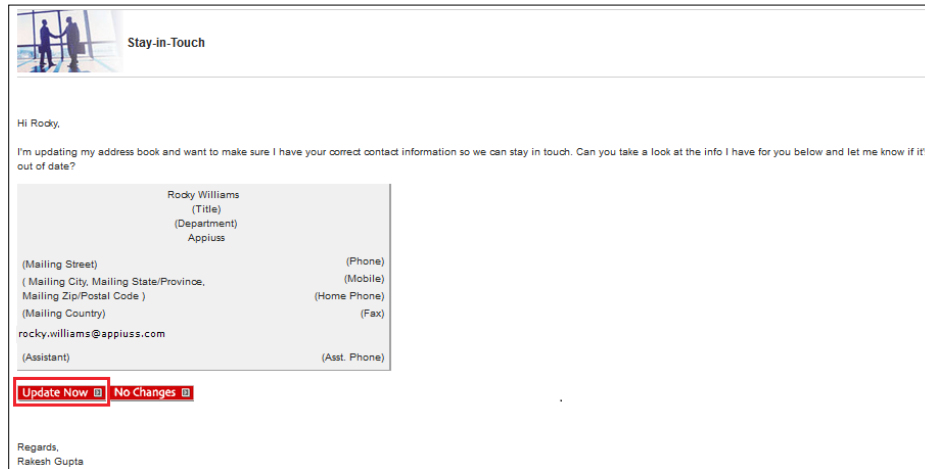
1. Click on the **Request Update** button as shown in the following screenshot:



2. It will redirect you to the **Send a Stay-in-Touch Request** window from where you can add the **CC** and **Bcc** fields, and customize **Subject**, **Note**, and **Signature**. Once done, click on the **Send** button, as shown in the following screenshot:



3. The following e-mail is sent to the contact's e-mail address. Open the e-mail and click on the **Update Now** button.



Stay-in-Touch

Hi Rocky,

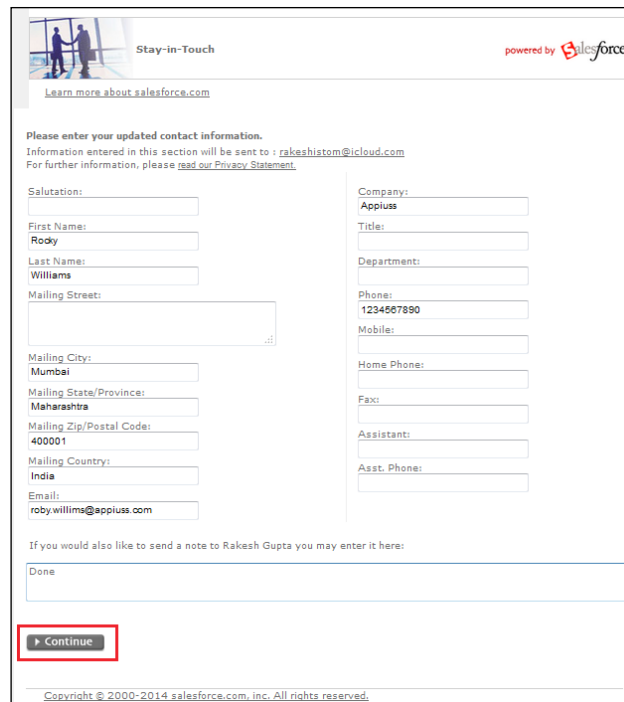
I'm updating my address book and want to make sure I have your correct contact information so we can stay in touch. Can you take a look at the info I have for you below and let me know if it's out of date?

Rocky Williams	
(Title)	
(Department)	Appluss
(Mailing Street)	(Phone)
(Mailing City, Mailing State/Province,	(Mobile)
Mailing Zip/Postal Code)	(Home Phone)
(Mailing Country)	(Fax)
rocky.williams@appluss.com	
(Assistant)	(Asst. Phone)

Update Now **No Changes**

Regards,
Rakesh Gupta

4. It will redirect the user to a new screen from where the user can update their information. Once done, click on the **Update** button, as shown in the following screenshot:



Stay-in-Touch powered by **Salesforce**

[Learn more about salesforce.com](#)

Please enter your updated contact information.
Information entered in this section will be sent to : rakeshistom@icloud.com
For further information, please [read our Privacy Statement](#).

Salutation:	Company:
<input type="text"/>	Appluss
First Name:	Title:
Rocky	<input type="text"/>
Last Name:	Department:
Williams	<input type="text"/>
Mailing Street:	Phone:
<input type="text"/>	1234567890
Mailing City:	Mobile:
Mumbai	<input type="text"/>
Mailing State/Province:	Home Phone:
Maharashtra	<input type="text"/>
Mailing Zip/Postal Code:	Fax:
400001	<input type="text"/>
Mailing Country:	Assistant:
India	<input type="text"/>
Email:	Asst. Phone:
rocky.williams@appluss.com	<input type="text"/>

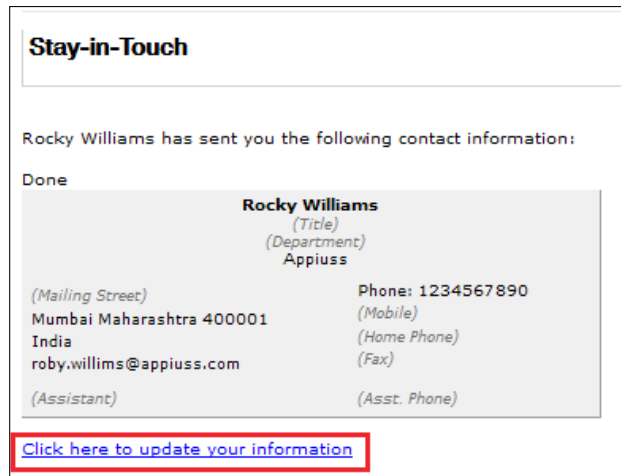
If you would also like to send a note to Rakesh Gupta you may enter it here:

Done

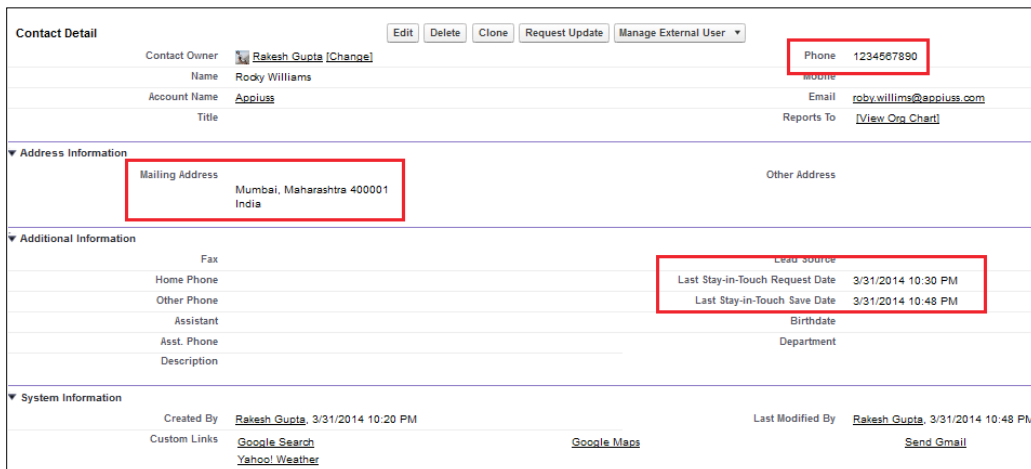
Continue

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- Salesforce will send an e-mail to the owner of the record notifying them that there is an update for a particular contact for which they have requested an update.
- Click on the **Click here to update your information** link if you want to update a contact.



- It will redirect you to the Stay-in-Touch edit page from where you can accept or reject changes. Both the previous and new values will be shown in this window. Click on **Accept Changes** and Salesforce will update the contact; with this, the process will be complete.
- In the following screenshot, you can see the updated contact:





To send a Stay-in-Touch request in mass numbers, you can use the **Mass Stay-in-Touch** tool available in the **Contact** tab under the **Tools** section.

Summary

In this chapter, we have gone through various ways to automate our business. We started with the validation rule and how it improves data quality and then moved on to the concept of formula field and Roll-up Summary field.

We also went through how to create a letterhead and e-mail templates.

In the topic that followed, we covered the workflow rule and approval process in depth along with their various limitations. We also discussed various ways to approve records. Finally, we discussed the request update and the Stay-in-Touch concepts in detail. In the next chapter, we will discuss various methods of data management in Salesforce along with the concept of a data loader, import wizard, and data import wizard.

7

Concepts of Data Management

In the previous chapter, we discussed various ways to automate your business. We discussed the workflow rule and the approval process in Salesforce. We also discussed time-based workflow and a way to monitor a time-based workflows queue. In this chapter, we will discuss various concepts related to data management in Salesforce. We will also discuss creating Sandbox and Tags concepts in Salesforce. The following topics will be covered in this chapter:

- Salesforce Record IDs
- Data management operations
- Various tools used for data management
- Truncating custom objects
- Sandboxes
- Deleting all data
- Data export service
- Getting storage usage details
- Mass transfer approval requests
- Mass transfer records
- Mass delete records
- Mass reassign accounts and the opportunity team
- Uses of Tags

Salesforce Record IDs

Before going ahead with discussing the concept of the data management, you have to understand the concept of Record IDs in Salesforce. As soon as you create any record in Salesforce, it will automatically generate a Record ID for you. The Record ID is a unique identifier of a record. We can get Record IDs in the following ways:

- From the URL of the record detail view
- By running the reports
- From the web services API
- From the formulas
- From the data loader

Salesforce provides two types of Record IDs. They are as follows:

- **A 15-digit case-sensitive form:** When you create a record from Salesforce UI, it will give you a 15-digit ID. We can use this in the URL and report. Reports do not expose IDs for all objects.
- **An 18-digit case-insensitive form:** When we work with the data loader or an API tool, it will return an 18-digit ID. You can use this in the data loader. The API always returns the Record IDs in an 18-digit format, but you can use either the 15-digit or 18-digit format with the API tool.

Data management operations

Until now, we have discussed various configuration features available in Salesforce. As soon as you are done with building a data model and the related development, the next task is to migrate data from the legacy system to Salesforce or to mass update data in Salesforce. There are various data management operations possible with data management tools as follows:

- **Insert:** This operation is used when you want to create new records for standard or custom objects of your organization. For example, you can use this feature to create an account in Salesforce.
- **Update:** This operation is used when you want to update an existing record in Salesforce, for example, if you want to update the account type for an existing account.

- **Export:** Salesforce provides various ways to export your data. By using this operation, you can download all the data of the organization for backup purposes or some other reason. You can also use this operation to get reference IDs of particular records to perform an insert or update operation on those records.
- **Upsert:** This operation is a combination of insert and update. Let's start with an example where Appiuss management wants to update thousands of account records based on Salesforce Record IDs, but at the same time, they also want to ensure that no Record ID exists in Salesforce, and then create those records.
- **Delete:** This operation is used when you want to delete records from Salesforce. To delete a record, you require a Salesforce ID.

Tools for data management

Salesforce provides various tools to manage your data. By using these tools, you can easily process thousands of records in a single transaction. A few tools are browser-based and a few have to be installed on your workstation. You do not have to pay any extra for these tools. The following is a list of tools provided by Salesforce:

- Import Wizard (browser-based)
- Data Import Wizard (browser-based)
- Data loader (installable)

Import Wizard

To import data in Salesforce, you can use Import Wizard. Import Wizard only supports account, contact, lead, solutions, and custom objects. It means you can use Import Wizard to import data in Salesforce only for these objects. Let's start with an example where the management in Appiuss wants to import data for a Sponsor object.

Creating a CSV file

To import data, first we have to create a Comma separated values (CSV) file. Initially, list down all the fields that require you to create a Sponsor record in Salesforce. We also require an Owner ID, which indicates who you want to assign these records to in Salesforce; in our case; it will be Rakesh Gupta's user ID. You can obtain the user ID by the user's detail page URL. Finally, our CSV file will look like the following screenshot:

Name	Type	Donation for Child Welfare	Donation for Women Welfare	OwnerID
Packt Publishing	Silver	300	300	00590000001qt4z
Universal Container	Gold	200	200	00590000001qt4z
Appiuss	Silver	100	100	00590000001qt4z


Import records into Salesforce through Import Wizard

To start importing data using Import Wizard, follow these instructions:

1. Navigate to **Setup | Administer | Data Management | Import Custom Objects**.
2. On the **Custom Object Import Wizard** page, click on the **Start the Import Wizard!** link, as shown in the following screenshot:

Custom Object Import Wizard

Use this wizard to import and/or update custom objects. You must be a salesforce.com administrator to use this wizard.



Steps to Import Custom Objects

1. Before you begin, create the custom object and any custom fields on the object, including master-detail and lookup relationship fields.
2. Import any records that are related to your custom object records. For example, if your custom object has a lookup relationship with accounts, import those accounts before importing your custom object.
3. To create your import file, export a custom object report from salesforce.com. If your column labels match the field labels in salesforce.com, the columns will be automatically mapped for you in the import operation.
4. If your custom object has owners, make sure your import file includes an owner column. Populate that column with the names of the record owners. Alternatively, populate the column with the salesforce.com IDs or external IDs of those users.
5. Review your data for accuracy, and make sure that your file has 50,000 or fewer records.
6. **Start the Import Wizard!**

- It will open another window; select the **Sponsor** object as shown in the following screenshot, and click on **Next**:

Step 1. Choose Record Step 1 of 7

[Next](#)

Welcome to the custom object import wizard.

From the list below, choose the type of record that you are importing.

Label	Master Object	Description
<input type="radio"/> Ad Group		A Google Ad Group is a collection of Text Ads and Keywords
<input type="radio"/> Google Campaign		Google AdWords Campaigns are high-level marketing initiatives
<input type="radio"/> Keyword		Keywords are the terms purchased in Google AdWords
<input type="radio"/> Search Phrase		Search Phrases are the search terms or phrases the user types into a search box
<input type="radio"/> Text Ad		Text Ads are the advertising copy that displays on the search results page
<input type="radio"/> SFGA Version		This object is for administrative purposes only and records the current version of the Salesforce for Google AdWords application. Do not edit this object.
<input type="radio"/> Event		This object is used to store event related information
<input type="radio"/> Event Registration		This object is used to store event registration related information
<input checked="" type="radio"/> Sponsor		This object is used to store Sponsor related information

[Next](#)

- On the next screen, you can choose whether you want to prevent duplicates from being created. In our case, select **No** and click on **Next** as shown in the following screenshot:

Step 2. Prevent Duplicates Step 2 of 7

[Previous](#) [Next](#)

To prevent duplicate Sponsor records from being created as a result of this import, choose Yes below.

Do you want to prevent duplicates from being created?

No - insert all records in my import file.

Yes - prevent duplicate records from being created. Note: You must select this option if you want to update existing records.

[Previous](#) [Next](#)

5. On the next screen, you can specify the user field that CSV represents. In our case, the CSV file already has a user ID, so select **Salesforce.com ID** and click on **Next**, as shown in the following screenshot:

Step 3. Specify Relationships Step 3 of 7

[Previous](#) [Next](#)

Sponsor records are owned by users. If there is a record owner column in your file, specify below the user field that it represents. If you do not include a record owner column in your file, you will be saved as the owner of all created records.

Which user field are you including in your file to designate record owners?

Name

Salesforce.com ID

External ID i

None

[Previous](#) [Next](#)

6. After that, select your CSV file and character encoding, and optionally, you can select **Trigger workflow rules for new and updated records** so the trigger will not fire when an import operation occurs for a current transaction. Finally, it will look like the following screenshot. Then, click on **Next**.

Step 4. File Upload Step 4 of 7

[Previous](#) [Next](#)

1. Click Browse and find your import CSV file.
 Import Wizard.csv
Error: You must enter a value
2. Specify the character encoding of your CSV file. In most cases, you can accept the default value provided.
ISO-8859-1 (General US & Western European, ISO-LATIN-1) ▼
3. Additional settings:
 Trigger workflow rules for new and updated records.

[Previous](#) [Next](#)

- On the next screen, you can map the file between CSV and object fields. On the next screen, you can map the column of the CSV file and object fields. In the CSV file, if you use the same name for the field, it will be auto-mapped. Make sure it looks like the following screenshot and then click on **Next**:

The screenshot shows the 'Step 5. Field Mapping' interface. At the top right, it says 'Step 5 of 7'. Below the title bar, there are 'Previous' and 'Next' buttons. A paragraph of text reads: 'Use the drop-down lists below to specify the salesforce.com fields that correspond to the columns in your import file. For your convenience, identically matching labels will be automatically selected.' Below this is a table with two columns: 'Import Field' and 'Salesforce.com Field'. The table contains five rows of mappings. At the bottom right, there are 'Previous' and 'Next' buttons, with the 'Next' button highlighted by a red box.

Import Field	Salesforce.com Field
Name (col 0)	Name
Type (col 1)	Type
Donation for Child Welfare (col 2)	Donation for Child Welfare
Donation for Women Welfare (col 3)	Donation for Women Welfare
OwnerID (col 4)	Owner

- On the next screen, it will show the message **Click Import Now! to submit this import request to salesforce.com**. Click on the **Import Now!** button as shown in the following screenshot:

The screenshot shows the 'Step 6. Verify Import Settings' interface. At the top right, it says 'Step 6 of 7'. Below the title bar, there are 'Previous' and 'Import Now!' buttons. A paragraph of text reads: 'Click **Import Now!** to submit this import request to salesforce.com.' Below this, there are 'Previous' and 'Import Now!' buttons, with the 'Import Now!' button highlighted by a red box.

- Salesforce.com will now begin to import your file. You will be notified by e-mail when your import is completed. It will also show the estimated time to finish this import operation. Click on the **Finish** button to complete this process.

- As soon as this process is completed, a record is created in Salesforce. To check this, go to the **Sponsor** object and verify. The following screenshot shows that our import process completed successfully:

The screenshot shows a Salesforce record for a Sponsor. The record details are as follows:

Sponsor Detail		Owner
Sponsor ID	S-0004	Rakesh Gupta [Change]
Name	Appiuss	
Donation for Women Welfare	\$100	
Type	Silver	
Donation for Child Welfare	\$100	
Booths	0	
Created By	Sagar Pareek, 4/26/2014 7:49 PM	Last Modified By
		Sagar Pareek, 4/26/2014 7:49 PM

Data Import Wizard

In the Spring '14 release, Salesforce launched Data Import Wizard. It provides an integrated interface that lets you import data for custom and standard objects, including accounts, contacts, leads, and solutions. It provides the same features as Import Wizards provide, but Data Import Wizard uses a bulk API to process the request so that it can process data faster than Import Wizard. We will create a few records for a Sponsor object. To do that, first create a CSV file with the following details for the Owner ID. You can choose your user ID. Your CSV file will look like the following screenshot:

Name	Type	Donation for Child Welfare	Donation for Women Welfare	OwnerID
Robby williams	Platinum	1000	500	00590000001qt4z
Appiuss Inc	Platinum	1500	400	00590000001qt4z
UC NGO	Platinum	1500	500	00590000001qt4z

Importing records into Salesforce through Data Import Wizard

To start importing data by using Data Import Wizard, follow these instructions:

- Navigate to **Setup | Administer | Data Management | Data Import wizard**.
- On the screen, click on the **Launch Wizard** button to start it.
- On the next screen, under the **What kind of data are you importing?** section, click on the **Custom object** tab, and select the **Sponsor** object.

- On the same screen, under the **What do you want to do?** section, click on **Add new records**, and under **Match by**, select **Name** as shown in the following screenshot:

What do you want to do? ?

Add new records ✓

Match by: ?
Name

Which User field in your file designates record owners? ?
--None--

Trigger workflow rules? ?
 Trigger workflow rules for new and updated records

Update existing records >

Add new and update existing records >

- Then, select your CSV file. Here, you can either drag-and-drop or browse for your file. This is a major advantage over the old Import Wizard. The result will look like the following screenshot:

Where is your data located? ?

File
Import Wizard.csv ✓

Character Code ?
ISO-8859-1 (General US & Western European, ISO-LATIN-1)

CSV

- As soon as you are done with file selection, click on **Next** to move on to mapping a field page.

7. If you use the same name for the field in your CSV file, Salesforce will automatically map the fields, else you will have to do it manually. To change the field mapping, click on the **Change** link, as shown in the following screenshot, and then click on **Next**:

Edit	Mapped Salesforce Object	CSV Header
Change	Donation for Child Welfare	Donation for Child Welfare
Change	Donation for Women Welfare	Donation for Women Welfare
Change	Name	Name
Change	Record Owner	OwnerID
Change	Type	Type

8. On the final screen, you will be given an option to review what you have selected until now, for example, the object, operations, and file that you selected. It will also give you an idea of the number of fields you mapped.

Your selections:	Your import will include:	Your import will not include:
Sponsors ✓ Add new records ✓ Import Wizard - DIW.csv ✓	Mapped fields 5	Unmapped fields 0

9. Once you are done with the review, click on the **Start Import** button to start the import process. As soon as the import process is completed, you will get an intimation e-mail from Salesforce regarding the success and error report.

Monitoring bulk data load jobs

To monitor the status of the recent data load job for Data Import Wizard, follow these instructions:

1. Navigate to **Setup | Monitor | Jobs | Bulk Data Load Jobs**.
2. You will get the **Quota** details, such as **CPU**, **IO**, and **Disk**, for the last 24 hours.

Quota

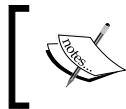
Your organization has processed **0** batches in the last 24 hours. Your organization can process **5,000** batches in a 24-hour period.

Resource used in the last 24 hours:
 CPU: 0 milliseconds
 IO: 0 bytes
 Disk: 0 bytes

3. Navigate to the **Completed last 7 days** section to get more details about the completed job or navigate to the **In Progress** section to get more details about the jobs that are in progress.
4. Click on **Job ID** to go to the detail page.

Completed last 7 days										
Job ID	Submitted By	Start Time	End Time +	Status	Operation	Object	Records Processed	Records Failed	Time to Complete ([hh]mm:ss)	
7509000000m9ZV	Pareek_Sagar	4/26/2014 10:08 PM	4/26/2014 10:11 PM	Closed	Upsert	Sponsor			02:28	
7509000000m9Za	Gupta_Rakesh	4/26/2014 10:10 PM	4/26/2014 10:10 PM	Closed	Insert	Sponsor	3	0	00:01	

5. On the detail page, you will find **Start Time**, **End Time**, **Status**, **Operation**, **Records Processed**, **Records Failed**, **Total Processing Time (ms)**, **PI Active Processing Time (ms)**, and many more options.



To learn more about Data Import Wizard, visit https://help.salesforce.com/HTViewHelpDoc?id=data_import_wizard.htm&language=en_US.

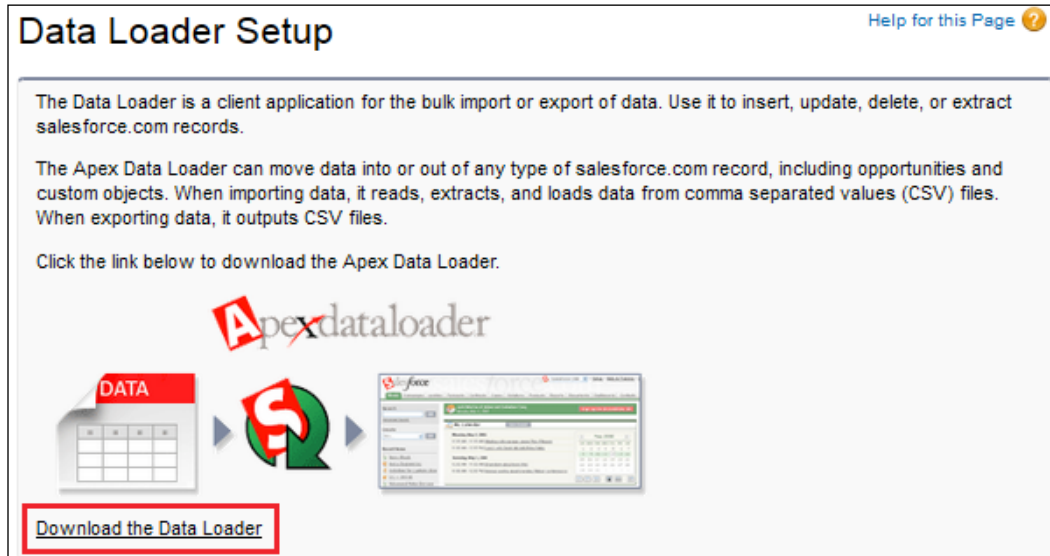
Data loader

Data loader is another tool used in data management activities. It is a desktop application for Windows, and is not supported in any other browser. To use this application, you first have to install it in your workstation. Data loader is a very powerful tool compared to Import Wizard and Data Import Wizard. It provides various functionalities such as Insert, Delete, Update, Upsert, and Export. This tool is freely available, which means you do not have to pay any extra to Salesforce to get this tool.


Installing data loader

To install data loader in your workstation, follow these instructions:

1. Navigate to **Setup | Administer | Data Management | Data Loader**.
2. You will be redirected to the **Data Loader Setup** page; now click on the **Download the Data Loader** link as shown in the following screenshot:



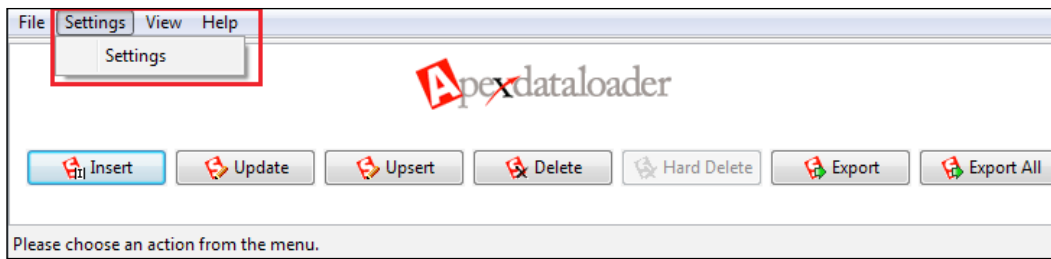
3. Once the download is completed, double-click on the installable file and follow the instructions that appear on the screen.

[ If you want to download the old version of data loader, visit <http://www.cloudsuccess.com/resource-centre/apex-data-loader-archive/>.]

Configuring data loader

Salesforce gives you the flexibility to configure data loader according to your needs. First, open your data loader by double-clicking on the icon and following these instructions:

1. Go to **Settings** under the **Settings** tab, as shown in the following screenshot, to open the settings page:

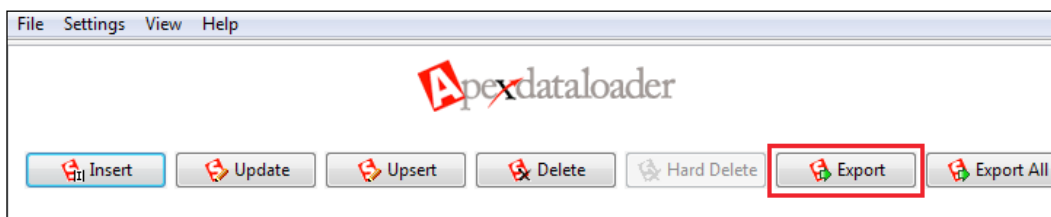


2. This will open the data loader setting page, where you will be able to change the value for various fields. Here, we will discuss a few important fields:
 - **Batch size:** This defines the batch size for a transaction
 - **Insert null value:** Select this when you want to assign a null value to a field
 - **Server host:** Set the URL according to your requirements. If you are logged in to the developer or production environment, use `https://login.salesforce.com/`, and for Sandbox, use `https://test.salesforce.com/`
 - **Time zone:** Use this field to set the time zone
 - **Proxy host:** Use this field to set the proxy host
 - **Proxy Port:** Use this field to set the proxy port
 - **Proxy usernames:** Use this field to set the proxy username
 - **Proxy Password:** Use this field to set the proxy password
 - **Start at row:** Here, you can set a numerical value so that it can start the CSV file process from that row
3. Once you are done with the setup, click on the **OK** button.

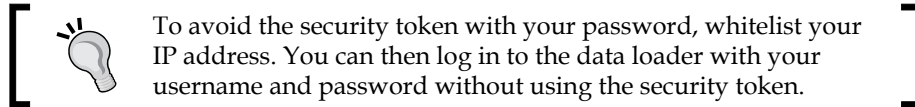
Exporting data using data loader

With a single click, you can export your data from Salesforce. In this example, we will export all the data from the Event Registration object. To export data, follow these instructions:

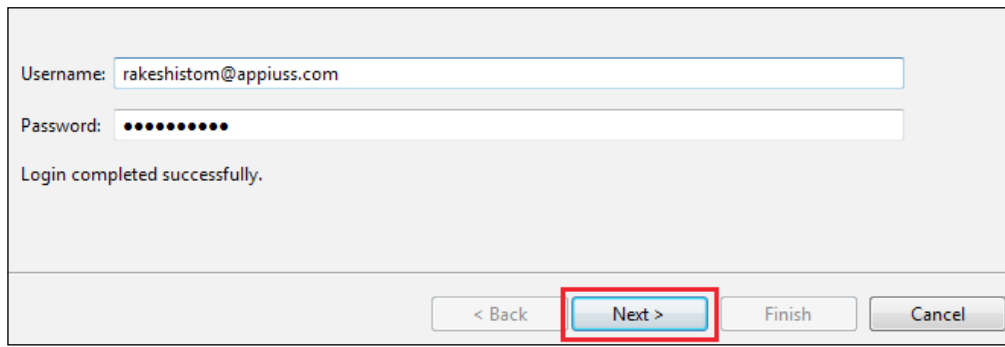
1. Click on the **Export** button as shown in the following screenshot:



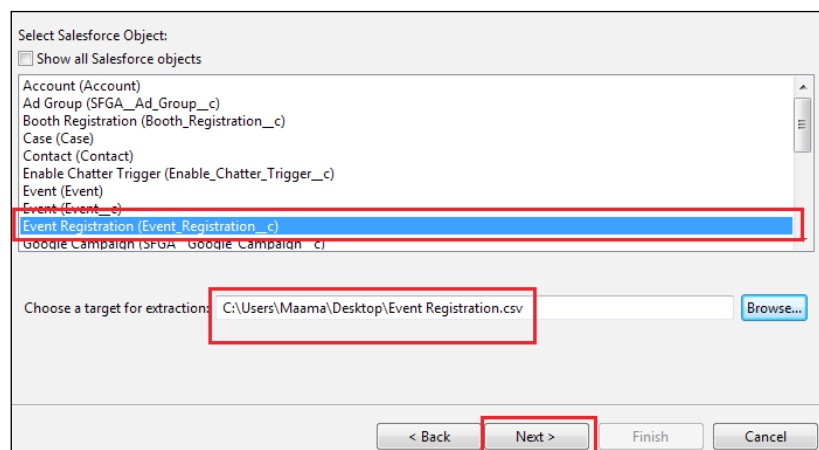
2. Log in to data loader by using your Salesforce credentials. In the **Username** field, enter your Salesforce username, and in the **Password** field, enter your Salesforce password followed by the security token, and click on the **Login** button.



3. After a successful login, the **Next** button will be enabled. Click on it as shown in the following screenshot:



4. On the next screen under **Select Salesforce Object**, in our case, select the **Event Registration** object and enter a location in your local workstation where you want to store the extracted file in the **Choose a target destination for extraction** field. Once done with the selection, click on **Next**, as shown in the following screenshot:



- On the last screen, you can choose the fields from which data needs to be extracted, and this tool gives you the flexibility to write a query in case you want to extract data based upon some requirements. In our case, first click on the **Select all fields** button and then on the **Finish** button to start this process. You can see this in the following screenshot:

The screenshot shows a dialog box with two main sections:

- Choose the query fields below.**: A list of fields with checkboxes. 'Id', 'OwnerId', and 'IsDeleted' are checked. Below the list are two buttons: 'Select all fields' (highlighted with a red box) and 'Clear all fields'.
- Create the where clauses to your query below.**: A table with columns 'Fields', 'Operation', and 'Value'. Below the table are 'Add condition' and 'Clear all conditions' buttons.

Below these sections, it says: "The generated query will appear below. You may edit it before finishing." The generated query is:



```
Select Id, OwnerId, IsDeleted, Name, CreatedDate, CreatedById, LastModifiedDate, LastModifiedById, SystemModstamp, LastActivityDate, LastViewedDate, LastReferencedDate, First_Name__c, Last_Name__c, Phone__c, Email__c, Address__c, City__c, State__c, Country__c, Gender__c, Twitter_Handle__c, Area_of_Interest__c, Event__c, DOB__c, Age__c, Zip_Code__c
```

 At the bottom, there are four buttons: '< Back', 'Next >', 'Finish' (highlighted with a red box), and 'Cancel'.

- As soon as this process completes, you will get a message on the screen that displays how many records were extracted, as shown in the following screenshot:

The screenshot shows a message box with the text: "The operation has fully completed. There were 3 successful extractions and 0 errors." Below the message are two buttons: 'View Extraction' (highlighted with a red box) and 'OK'.

- Click on the **View Extraction** button to open the extracted file, as shown in the preceding screenshot.

[ To learn more about the data loader functionality, visit https://help.salesforce.com/apex/HTViewHelpDoc?id=inserting_updating_or_deleting_data.htm&language=en.]

Differences between data loader and Import Wizard

The following table lists a few differences between data loader and Import Wizard. It will help you understand when to use data loader and when to use Import Wizard.

Features	Import Wizard	Data loader
Available editions	Contact Manager, Group, Professional, Enterprise, Unlimited, Performance, and Developer	Enterprise, Unlimited, Performance, Developer, and Database
Success/error files	No	Yes
Object supported	Account, contact, lead, solutions, and custom objects	All
Number of records you can import or export	Up to 50,000	In between 5,000 to 5 M
Import	Yes	Yes
Export	No	Yes
Schedule import/export	No	Yes
Alert for duplicate	Yes	No
Choose whether to trigger workflow rule	Yes	No
Save mapping file for later use	No	Yes
External or internal to Salesforce	Internal	External

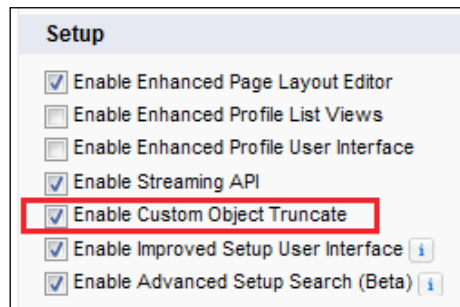
Truncating custom objects

Truncating a custom object allows Salesforce to delete all records from particular objects and save the empty object and its metadata. This is a fast way to delete all records from custom objects compared to Import Wizard and Data Import Wizard. This action will remove records from custom objects and you cannot recover them from the recycle bin.

Enabling truncate for custom objects

Before using this feature for your organization, you must enable it. To do this, follow these instructions:

1. Navigate to **Setup | Build | Customize | User Interface**.
2. On the user interface page, navigate to the **Setup** section.
3. Select the **Enable Custom Object Truncate** checkbox, as shown in the following screenshot:



4. Click on **Save**.

Performing truncate for custom objects

You can use this feature when you have created a custom object and filled it with test records. To delete those test records with a single action, you can use this feature.

To perform this action, follow these instructions:

1. Navigate to **Setup | Build | Create | Objects**.
2. Identify the object on which you want to perform this action and click on an object name to go to its detail page. In our case, select **Event Object**.

3. Click on the **Truncate** button, as shown in the following screenshot:

Custom Object
Event

[Standard Fields \[4\]](#) | [Custom Fields & Relationships \[7\]](#) | [Validation Rules \[0\]](#) | [Page Layouts \[1\]](#) | [Field Sets \[0\]](#) | [Compact Layouts \[1\]](#) | [Search Layouts \[0\]](#) | [Buttons, Links, and Actions \[0\]](#) | [Apex Sharing Reasons \[0\]](#) | [Apex Sharing Recalculation \[0\]](#) | [Object Limits \[1\]](#)

Custom Object Definition Detail

Singular Label	Event	Description	This object is used to store event related information
Plural Label	Events	Enable Reports	<input checked="" type="checkbox"/>
Object Name	Event	Track Activities	<input checked="" type="checkbox"/>
API Name	Event_c	Available for Customer Portal	<input type="checkbox"/>
		Track Field History	<input checked="" type="checkbox"/>
		Deployment Status	Deployed
		Help Settings	Standard salesforce.com Help Window
Created By	Sagar Pareek, 3/22/2014 9:31 PM	Modified By	Rakesh Gupta, 3/23/2014 6:32 PM

4. It will pop up a window. Read the warning message carefully and type the object name as shown in the following screenshot:


Truncate Custom Object: Event



Truncating a custom object permanently removes all of its records. You can't recover the records from the Recycle Bin. A copy of the truncated object appears in the Deleted Objects list for 15 days—during this period the object and its records continue to count toward your organization's limits—and then the copied object and its records are permanently deleted.

Enter the name of the object to truncate:

5. Click on the **Truncate** button to complete the process.

 When you truncate a custom object, Salesforce stores a copy of the truncated object in the deleted objects' list for 15 days, and it will count against your organization's limit. After 15 days, the records will be erased permanently and will no longer count against your limits.

Sandbox

Sandbox is a playground that an organization can use for development or testing purposes. In simple words, it is a copy of your production organization. It is completely isolated from your production organization; it means the action that you perform on your Sandbox is not affected in the production organization. Let's start with an example; Salesforce will not allow us to write or change the Apex code in the production organization. In that case, the organization can use the developer Sandbox to develop the application by using the Apex code and move it from one production to other when it's ready to be deployed.

Types of Sandboxes

Salesforce comes up with a few types of Sandboxes for your organization. You can use them as per your requirements. When you purchase licenses from Salesforce.com for your organization, you can negotiate and get multiple Sandboxes at that time. Salesforce also allows you to buy a Sandbox any time you need it. The various types of Sandboxes are as follows:

- **Developer Sandbox:** This is a configuration-only Sandbox. You can use this type of Sandbox for coding and testing purposes with a single user. In Developer Sandbox, multiple users can log in, but the main purpose of this Sandbox is that it provides an isolated playground to the developer where they can write a code and test the functionality. This Sandbox's storage limit is limited to 200 MB. You can refresh a Developer Sandbox once per day.
- **Developer Pro Sandbox:** This type of Sandbox copies all your production reports, dashboards, price books, products, apps, and customization under the **Setup** option, but it excludes all records from standard and custom objects, document, and attachments. This type of Sandbox takes minimal time to create and refresh. You can refresh a Developer Pro Sandbox once per day.
- **Partial Data Sandbox:** This type of Sandbox contains organization metadata with a selected amount of data from production that you defined on Sandbox templates. Partial Data Sandbox is available for Enterprise, Performance, and Unlimited Editions. You can refresh your Partial Data Sandbox from production every 29 days. This Sandbox contains a maximum of 5 GB data and 10,000 records.
- **Full Copy Sandbox:** This copies your entire production organization with data and metadata. You can include standard and custom object records, attachments, and documents. You can refresh your Full Copy Sandbox from production every 29 days. The Record ID in Full Copy Sandbox and the Production Sandbox are identical.

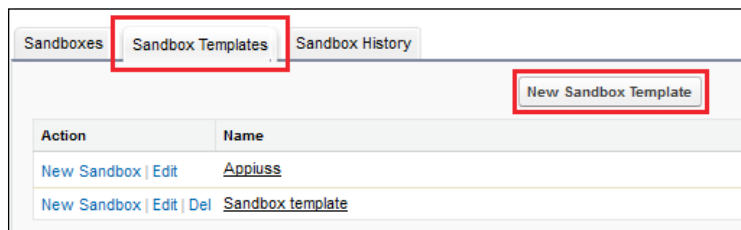


Sandbox is only available in Enterprise, Unlimited, and Performance Editions.

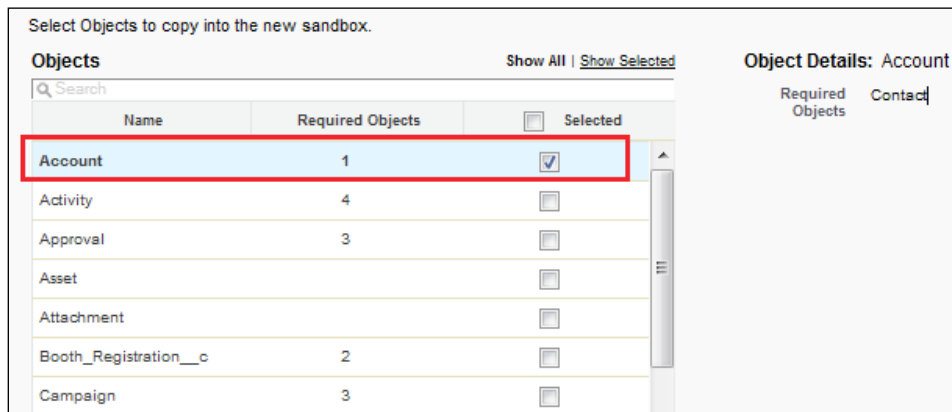
Defining the Sandbox templates

The Sandbox templates allow your organization to specify objects and data to copy to your Full or Partial Data Sandbox, so that your organization can control the size and content of each Sandbox. Sandbox templates are only available for Full or Partial Data Sandbox. When you create a Sandbox template, you select the object data (standard and custom) to copy. To create a new Sandbox template for your organization, follow these instructions:

1. Navigate to **Setup | Deploy | Sandboxes**.
2. Click on the **Sandbox templates** tab, and then click on the **New Sandbox Template** button as shown in the following screenshot:



3. This will redirect you to the **New Sandbox Template** creation page where you enter the **Name** and **Description** for the Sandbox template, and select the object by selecting the checkbox available in front of each object:

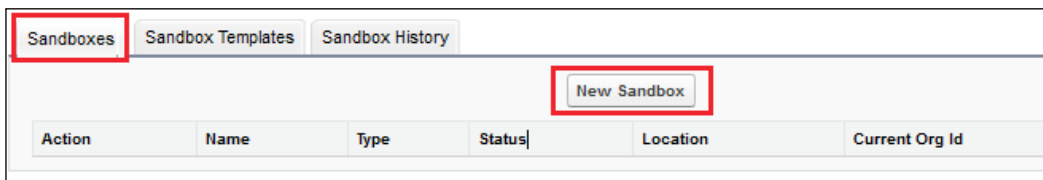


4. Click on **Save**.

Creating a Sandbox

When you create a new Sandbox, Salesforce will automatically copy your data from the production organization into the new Sandbox. For Partial Data Sandbox and Full Copy Sandbox, it will refer to the Sandbox template. To create a new Sandbox, follow these instructions. In this example, we will create a Partial Data Sandbox.

1. Navigate to **Setup | Deploy | Sandboxes**.
2. Click on the **Sandboxes** tab and then click on the **New Sandbox** button, as shown in the following screenshot:



3. This will redirect you to a new **Create Sandbox** page where you can enter the **Name** and **Description** for the new Sandbox and select the Sandbox type. In our case, select **Partial Data** Sandbox as shown in the following screenshot:

Create Sandbox

Sandbox Information

Name:

Description:

Sandbox License

Developer	Developer Pro	Partial Data
Refresh Interval: 1 Day	Refresh Interval: 1 Day	Refresh Interval: 5 Days
Capacity: 200 MB	Capacity: 1 GB	Capacity: 5 GB
Includes: <ul style="list-style-type: none"> • Configuration • Apex & Metadata • All Users 	Includes: <ul style="list-style-type: none"> • Configuration • Apex & Metadata • All Users 	Includes: <ul style="list-style-type: none"> • Configuration • Apex & Metadata • All Users • Records (sample of selected objects) • Sandbox Template Support
Available: 1 (0 in use)	Available: 1 (0 in use)	Available: 1 (0 in use)
<input type="button" value="Create"/>	<input type="button" value="Create"/>	<input type="button" value="Next"/>

4. On the next screen, you have to select the Sandbox templates and click on **Create** as shown in the following screenshot:

Create Sandbox

Select a Sandbox Template to use for creation of the new sandbox.

Sandbox Templates

Name
<input checked="" type="radio"/> Appiuss
<input type="radio"/> Sandbox template


Preview: Appiuss

Objects
Account
Contact

Objects Selected: 2

Back Create Cancel

5. As soon as the Sandbox creation is completed, you will get an intimation e-mail from Salesforce stating that your Sandbox is ready to use.

 Your Sandbox credentials will be the same as that of production except that the username will be appended with the . sandbox name. In our case, if the production username is abc@appiuss.com, then the Sandbox username will be abc@appiuss.com.dev.

Refreshing the Sandbox

You can only refresh a Sandbox from your production organization. The benefit of refreshing your Sandbox is that it is in sync with the production environment data and metadata, according to the Sandbox type you choose to refresh. Before going ahead, first identify the Sandbox you want to refresh. To refresh a Sandbox, follow these instructions:

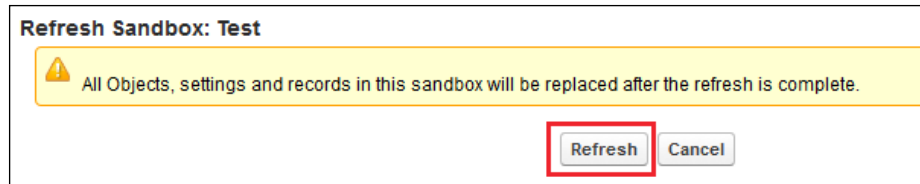
1. Navigate to **Setup | Deploy | Sandboxes**.
2. Click on the **Refresh** link available on front of each sandbox name, as shown in the following screenshot:

Sandboxes Sandbox Templates Sandbox History

New Sandbox

Action	Name	Type	Status	Location
Edit Del Refresh Login SIT	SIT	Full	Completed	CS5
Edit Del Refresh Login Test	Test	Developer Pro	Completed	CS6

- This will pop up a warning message stating that **All Objects, settings and records in this sandbox will be replaced after the refresh is complete.** Click on the **Refresh** button to start this process, as shown in the following screenshot:



- The refresh time depends upon your metadata and records in the production organization.

Deleting all the data

If you have a trial account of Salesforce, and at any time you decide to delete all the data including the sample data, that is, the data you stored in the Salesforce trial organization, follow these instructions:

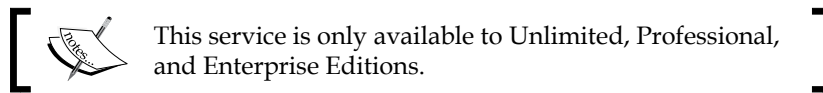
- Navigate to **Setup | Data Management | Delete All Data.**
- Salesforce will request you to enter text to state that you understand all data will be deleted:

- Click on the **Submit** button as shown in the preceding screenshot to complete this process.

[ This feature is only available during the trial period.]

Data Export Service

Before you plan to import any mass data into your Salesforce organization, it is highly recommended that you take a backup of your existing data prior to the import. Salesforce.com provides a weekly Data Export Service, which exports all your data into the .csv files of 150 MB each and packs them into a .zip file of 512 MB. The number of files generated depends on the data in your organization. Data Export Service sends a link to the administrator via an e-mail where they can download the files from. Administrators can schedule the export every 29 days for the Professional Edition and every seven days for the Unlimited and Enterprise Editions.

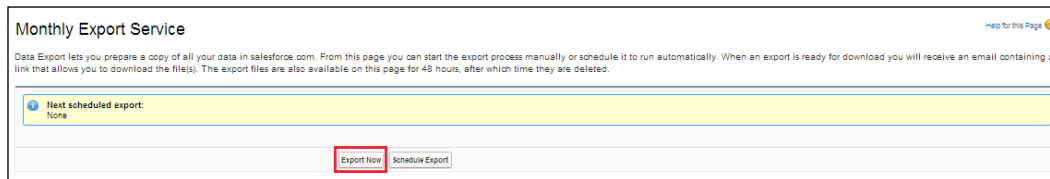


Salesforce provides two ways to use the export services as follows:

- **Export Now:** Use this feature to export the data right away
- **Schedule Export:** Use this feature whenever you want to schedule the export service

To make use of the Data Export Service, follow these instructions. In this example, we will use the **Export Now** feature.

1. Navigate to **Setup | Administer | Data Management | Data Export**.
2. Click on the **Export Now** button as shown in the following screenshot:



3. Now you need to select **Exported File Encoding**. The data must include the attachments or not, and the Chatter files and Salesforce CRM content document versions.

Weekly Export Service [Help for this Page](#)

Export File Encoding ISO-8859-1 (General US & Western European, ISO-LATIN-1) ▾

Include images, documents, and attachments ⓘ

Include Chatter files and Salesforce CRM Content document versions ⓘ

Replace carriage returns with spaces

Start Export Cancel

Exported Data
 Select what type of information you would like to include in the export. The data types listed below use the Apex API names. If you are not familiar with these names, select Include all data for your export.

<input type="checkbox"/> Include all data	<input type="checkbox"/> BusinessProcess	<input type="checkbox"/> Contract
<input type="checkbox"/> RecordType	<input type="checkbox"/> ContractContactRole	<input type="checkbox"/> EntityHistory
<input type="checkbox"/> Approval	<input type="checkbox"/> EmailMessage	<input type="checkbox"/> EmailRoutingAddress
<input type="checkbox"/> FieldHistory	<input type="checkbox"/> LinkReference	<input type="checkbox"/> Campaign
<input type="checkbox"/> OrgWideEmailAddress	<input checked="" type="checkbox"/> Account	<input type="checkbox"/> Contact
<input type="checkbox"/> CampaignMember	<input type="checkbox"/> Opportunity	<input type="checkbox"/> OpportunityContactRole
<input type="checkbox"/> Lead	<input type="checkbox"/> OpportunityLineItem	<input type="checkbox"/> OpportunityCompetitor
<input type="checkbox"/> OpportunityHistory		

4. Select the objects whose data you want to export. In our example, select the **Account** object and click on the **Start Export** button as shown in the preceding screenshot.
5. As soon as the export completes, you will get an e-mail notification with data attached in a ZIP file format.

Get the storage usage details

Your records or attachments count against some storage usage. Salesforce provides a set of storage to the user in an organization, which is used to store the organization data. Salesforce provides mainly two types of storage:

- Data storage
- File storage

Data storage

Data storage includes accounts, article types, article type translations, campaigns, campaign members, cases, case teams, contacts, contracts, custom objects, e-mail messages, events, forecast items, Google Docs, ideas, leads, notes, opportunities, opportunity splits, quotes, quote template rich text data, solutions, tag applications, unique tags, and tasks.

The following table shows the data storage provided by Salesforce:

Salesforce Edition	Per organization's minimum data storage	Per user license's data storage allocation
Contact manager	1 GB	20 MB
Group	1 GB	20 MB
Professional	1 GB	20 MB
Enterprise	1 GB	20 MB
Performance	1 GB	120MB
Unlimited	1 GB	120MB
Developer	5 GB	Not applicable

As the preceding table states, the Contact manager, Group, Professional, Enterprise, Performance, and Unlimited Salesforce Editions are allocated either 1 GB data storage limit or a per-user data storage limit, whichever is greater.

Let's start with an example. An Enterprise Edition organization with 20 users receives 1 GB, as 20 users multiplied by 20 MB per user is 400 MB, which is less than the 1 GB minimum, whereas a Professional Edition organization with 200 users receives more than the 1 GB minimum, as 200 users multiplied by 20 MB per user is 4,000 MB.

File storage

File storage counts files in attachments, documents tab, files tab, file field, Salesforce CRM Content, Chatter (including user photos), and Site.com assets. The following table shows the file storage provided by Salesforce:

Salesforce Edition	Per organization's minimum file storage	Per user license's file storage allocation
Contact manager	11 GB	612 MB
Group	11 GB	612 MB
Professional	11 GB	612 MB
Enterprise	11 GB	2 GB
Performance	11 GB	2 GB
Unlimited	11 GB	2 GB
Developer	20 MB	Not applicable

The preceding table shows the data storage provided by Salesforce Contact manager, Group, Professional, Enterprise, Performance, and Unlimited Editions are allocated a per-user limit multiplied by the number of users in the organization, plus an additional per-organization allocation.

Let's start with an example. An Enterprise Edition organization with 1,200 users receives 2,422 GB of file storage or 2 GB per user multiplied by 1,200 users plus an additional 11 GB, whereas a Professional Edition organization with 1,200 users receives about 740 GB of file storage or 612 MB per user multiplied by 1,200 users and an additional 11 GB.

You can get both of the storage details for your organization by following these instructions:

1. Navigate to **Name | Setup | Administration Setup | Data Management | Storage Usage**.

Storage Usage				Help for this Page
Your organization's storage usage is listed below.				
Storage Type	Limit	Used	Percent Used	
Data Storage	1.0 GB	849 KB	0%	
File Storage	1.0 GB	1.1 MB	0%	

2. Select the **Current Data Storage Usage** section to get the data storage usage details, and select the **Current File Storage Usage** section to get the file storage usage details. If you want to know about the top data storage users for your organization, then navigate to the **Top Users by Data Storage Usage** section, and if you want to know about the top file storage users, then navigate to the **Top Users by File Storage Usage** section.

Mass transfer approval requests

If an approval request approver is absent or has left the organization, then you'll be required to transfer the pending approval request to a new user. Let's start with an example. An Appiuss user, Sagar Pareek, is on leave for a few days (from April 27, 2014 to April 28, 2014), and the system administrator decides that any approval requests in the absence of Sagar Pareek will be transferred to Rakesh Gupta; to do this, follow these instructions:

1. Navigate to **Setup | Administer | Data Management | Mass Transfer Approval Requests**.
2. On the next screen, enter the criteria to search for the approval requests. For the preceding scenario, we need to enter the criteria, as **Date Submitted** must be between **4/27/2014** to **4/28/2014**.
3. Select the radio button **Mass transfer outstanding approval requests to a new user**, select **Rakesh Gupta**, and then click on **Find** as shown in the following screenshot:

Mass Transfer Approval Processes [Help for this Page](#)

Use the options below to manage multiple pending approval requests. To begin, filter approval request records, and click Find. When the list of results displays, specify the action you want to take.

Mass Transfer Approval Processes

Find approval requests that match the following criteria:

Date Submitted	greater or equal	4/27/2014	AND
Date Submitted	less or equal	4/28/2014	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Mass remove records from an approval process

Mass transfer outstanding approval requests to a new user

Comments:

- Now, under this section, you can see the result matching the criteria. Select the appropriate result (in our case, all) and click on the **Transfer** button to transfer it to a new approver, as shown in the following screenshot:

<input type="checkbox"/> Related To	Type	Current Approver	Submitter	Date Submitted
<input type="checkbox"/> Active	Account	Pareek_Sagar	Pareek_Jai	4/27/2014 2:28 PM

Transfer Cancel

- Now, the selected approval requests will be transferred to the user defined in the criteria.

Mass transfer record

Sometimes, it is required to transfer the ownership of the records to another user. Let's start with the example from the preceding scenario. As Sagar Pareek left the organization, the system administrator wants to transfer his account's ownership to Rakesh Gupta. To do this, follow these instructions:

- Navigate to **Setup | Administer | Data Management | Mass Transfer Records**.
- You will see a list of available objects. Click on **Transfer Accounts** as we want to transfer an account.

Mass Transfer

- **Transfer Accounts** — Transfer multiple accounts from one user to another
- **Transfer Ad Groups** — Transfer multiple ad groups from one user to another
- **Transfer Events** — Transfer multiple events from one user to another
- **Transfer Event Registrations** — Transfer multiple event registrations from one user to another
- **Transfer Google Campaigns** — Transfer multiple google campaigns from one user to another
- **Transfer Keywords** — Transfer multiple keywords from one user to another
- **Transfer Leads** — Transfer multiple leads from one user to another
- **Transfer Search Phrases** — Transfer multiple search phrases from one user to another
- **Transfer SFGA Version** — Transfer multiple sfga version from one user to another
- **Transfer Sponsors** — Transfer multiple sponsors from one user to another
- **Transfer Text Ads** — Transfer multiple text ads from one user to another

- On the next screen, enter the **Transfer from** and **Transfer to** fields and the search criteria.

- As soon as you are done with entering the criteria, click on the **Find** button to get all records that matched with your search criteria, as shown in the preceding screenshot.
- Now, you will see the records that match the criteria in another section, just below the search section.

<input checked="" type="checkbox"/>	Account Name	Account Site	Billing State/Province	Phone	type	Account Owner Alias	Created By Alias	Last Modified By Alias
<input checked="" type="checkbox"/>	Appiuss					spare	RGupt	RGupt
<input checked="" type="checkbox"/>	Connexion					spare	spare	RGupt
<input checked="" type="checkbox"/>	Eco Flight					spare	spare	spare
<input checked="" type="checkbox"/>	Market Lead					spare	spare	spare
<input checked="" type="checkbox"/>	Packt Publishing		West Midlands		Other	spare	RGupt	RGupt

- Select the records and click on the **Transfer** button to transfer the records to their new owner, as shown in the preceding screenshot.

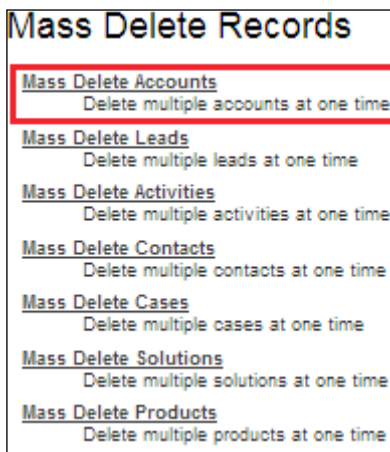


To learn more about the mass transfer record functionality, visit https://help.salesforce.com/htviewhelpdoc?id=admin_transfer.htm&siteLang=en_US.

Mass deleting records

You need to mass delete records in your organization when incorrect information is filled in the record or during a mass upload if something goes wrong. Let's start with an example about the organization Appiuss. One of the users performed a mass upload and forgot to put the industry type for every account that was uploaded. The system administrator has decided to delete all these records that were uploaded on April 27, 2014; to do this, follow these instructions:

1. Navigate to **Setup | Administer | Data Management | Mass Transfer Approval Requests**.
2. You will see a list of available objects that you can mass delete. Select **Mass Delete Accounts** in our case.



3. Navigate to **Step 3: Find Accounts that match the following criteria** on the screen, enter the search criteria in our scenario, select **Created Date equals 04/27/2014**, and click on the **Search** button to get all the records that match the search criteria, as shown in the following screenshot:

▼ Step 3: Find Accounts that match the following criteria:

Created Date	▼ equals	▼ 04/27/2014	AND
--None--	▼ --None--	▼	AND
--None--	▼ --None--	▼	AND
--None--	▼ --None--	▼	AND
--None--	▼ --None--	▼	


Filter By Additional Fields (Optional):

- You can use "or" filters by entering multiple items in the third column, separated by commas.
- For date fields, enter the value in following format: 4/28/2014
- For date/time fields, enter the value in following format: 4/28/2014 12:32 AM

4. Select the records you want to delete and click on the **Delete** button, as shown in the following screenshot:

<input checked="" type="checkbox"/>	Account Name	Billing State/Province	Phone	Type	Account Owner Alias	Created By Alias	Last Modified By Alias
<input checked="" type="checkbox"/>	Active				ipare	ipare	ipare
<input checked="" type="checkbox"/>	Connexion				spare	spare	RGupt
<input checked="" type="checkbox"/>	Eco Flight				spare	spare	spare
<input checked="" type="checkbox"/>	Market Lead				spare	spare	spare

5. You can also select the **Permanently delete the selected records** option. When this option is selected, you cannot restore any deleted records from the Recycle Bin. Please be careful when selecting this checkbox as doing this deletes records permanently.

 To learn more about the mass delete record functionality, visit https://help.salesforce.com/htviewhelpdoc?id=admin_massdelete.htm&siteLang=en_US.

Mass reassign accounts and opportunity teams

To manage your organization teams better with distribution of management of records, you may wish to reassign a particular set of records from one team to another. You can reassign the account and opportunity records to teams in Salesforce. For example, we want to add a new team member Robby Williams to an existing account and an opportunity team for the records created on the date April 27, 2014. In order to do that, follow these instructions:

1. Navigate to **Setup | Administer | Data Management | Mass Reassign Account Teams**.
2. Now, select **Add an account team member** and click on **Next** as shown in the following screenshot:

Mass Account Team Reassign Help for this Page ?

Step 1. Choose to add, remove or reassign a team member Step 1 of 4

Add an account team member
 Remove an account team member
 Replace an existing account team member with a new team member, or change the role of an existing team member

Next Cancel

3. Enter the search criteria on the next screen, as **Created Date equals 4/27/2014**, and click on **Next**, as shown in the following screenshot:

Step 2. Search for Accounts Step 2 of 4

Previous **Next** Cancel

Search for the accounts to which you want to add a team member:

Account Created Date	▼	equals	▼	4/27/2014	AND
--None--	▼	--None--	▼		AND
--None--	▼	--None--	▼		AND
--None--	▼	--None--	▼		AND
--None--	▼	--None--	▼		AND

4. On the next screen, select the accounts for which you want to assign this member in the team. In our case, select all records and click on **Next** as shown in the following screenshot:

Step 3. Select Accounts Step 3 of 4

Previous **Next** Cancel

Select the accounts to which you want to add a team member:

<input checked="" type="checkbox"/>	Account: Account Name	Account: Account Site	Account: Billing State/Province	Account: Phone	Account: Type	Account: Owner Alias
<input checked="" type="checkbox"/>	Active					ipare
<input checked="" type="checkbox"/>	Connexion					spare
<input checked="" type="checkbox"/>	Eco Flight					spare
<input checked="" type="checkbox"/>	Market Lead					spare

Previous Next Cancel

5. On the next screen, specify the new team member that you want to assign to those selected records; in our case, select the user **Robby Williams**. Also, specify the **Team Role**, **Account Access**, **Opportunity Access**, and **Case Access** fields. You can see this in the following screenshot:

Step 4. Add an account team member Step 4 of 4

Previous **Add** Cancel

Specify the team member that you would like to add to each selected account.

New Team Member:

Team Role: ▼

Account Access: ▼

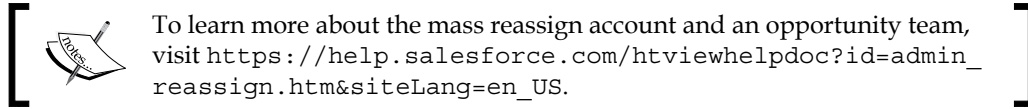
Opportunity Access: ▼

Case Access: ▼

Previous Add Cancel

6. Once done, click on the **Add** button to start this process.
7. On the next screen, you will get a success message. Click on the **Done** button to complete this process.

- In a similar way, you can mass reassign opportunity teams by navigating to **Setup | Administer | Data Management | Mass Reassign Opportunity Teams** and then following the preceding instructions.



Tags

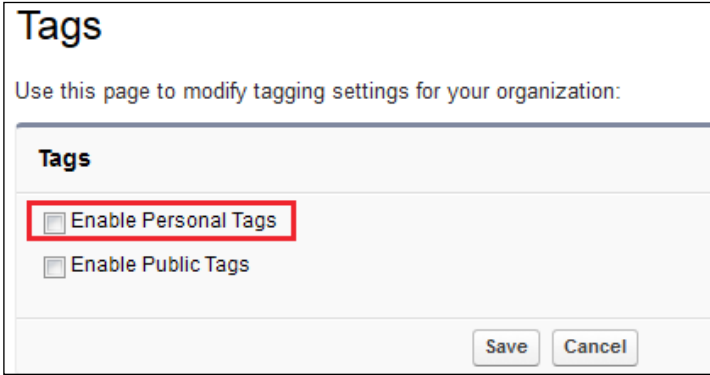
Tags are some keywords that you can use with your records to make a search easier and organize the records in your personalized way. For example, in your organization, you have thousands of account records, but you want to organize the accounts that were created in the summer of 2014, so that the next time you search for the account records, you simply need to search `summer 2014`.

There are two types of tags that are provided by Salesforce:

- Personal Tags:** These are private to a specific user.
- Public Tags:** These are public and available for all users.

To use the tags feature, you need to enable it. To enable tags, follow these instructions:

- Navigate to **Setup | Build | Customize | Tags | Tab Settings**.
- Select **Enable Personal Tags** as shown in the following screenshot:



Tags

Use this page to modify tagging settings for your organization:

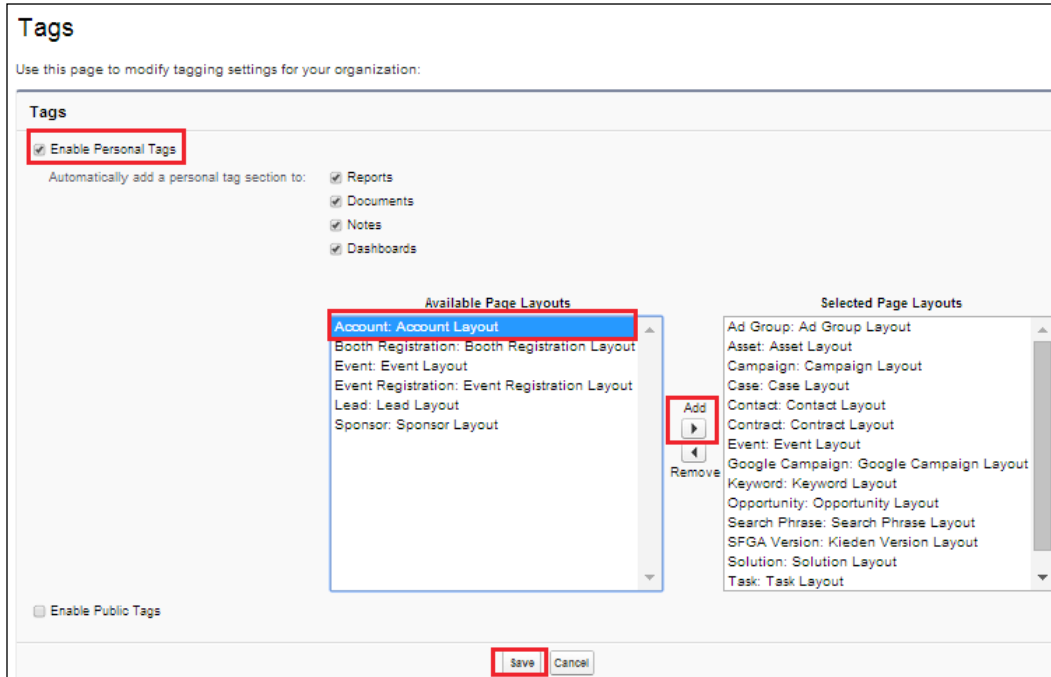
Tags

Enable Personal Tags

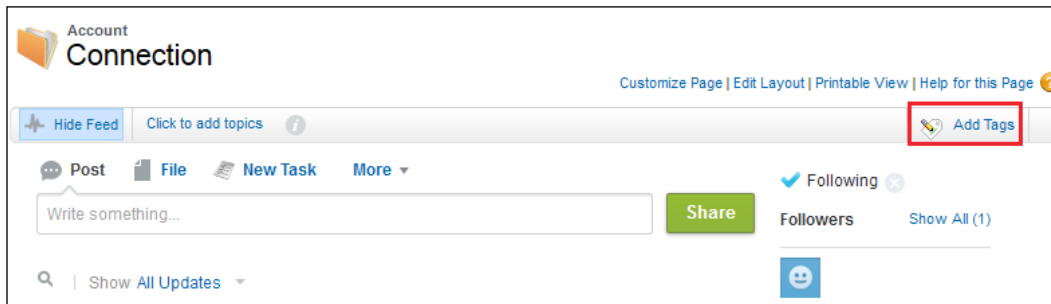
Enable Public Tags

Save Cancel

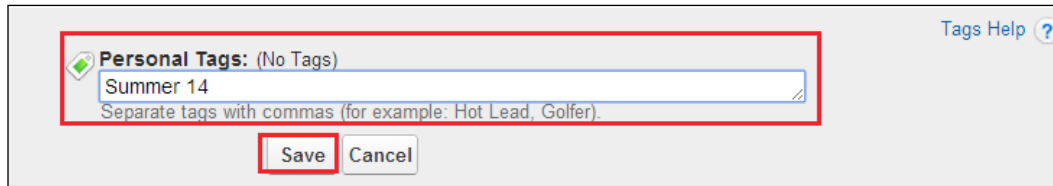
3. Select the layout on which you want to show the tagging feature. In our case, select the **Account Layout** option and click on the **Save** button, as shown in the following screenshot:



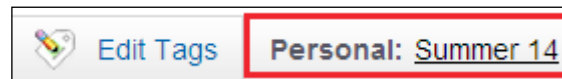
4. Now, go to any of the account record detail pages and you will see a button **Add Tags** as shown in the following screenshot:



5. Enter the tag that you want to give to this account; in our case, enter Summer 14 and click on **Save** as shown in the following screenshot:



6. Now, the tag will be associated with this account, and you can see the related tags in the upper-right corner of the account.



In a similar way, you can enable public tags, and they will be available to all users.

Summary

In this chapter, we went through various ways to manage our data in Salesforce. At the beginning of the chapter, we discussed different types of IDs in Salesforce. Then, we moved on and discussed various data management tools provided by Salesforce. We also went through the ways to create a Sandbox for an organization. In the next topic, we covered deleting all data and mass transfer approval requests. We also discussed how to mass transfer the ownership of a record to another user. Finally, we discussed mass delete records and tags. In the next chapter, we will discuss various types of reports and dashboards in Salesforce along with the concept of report and dashboard scheduling.

8

Reports and Dashboards in Salesforce

In the previous chapter, we discussed various ways of managing data for your organization. We explored the import wizard, data loader, and various data management operations in Salesforce. We also discussed Sandbox management in Salesforce. In this chapter, we will discuss various concepts related to reports and dashboards in Salesforce. We will also discuss various ways to share reports and dashboards in Salesforce. The following topics will be covered in this chapter:

- Report types
- Different types of reports
- Dashboard components and their types
- Exporting a report
- Using various methods to share reports and dashboards
- Hiding unused report types
- Exporting reports without footers
- Floating headers in summary and matrix reports
- Analytical snapshots

A report is a way to understand how efficiently your organization is performing. For example, your sales director wants to know the number of opportunities won in the current month or number of leads captured through Web-to-Lead to check whether this is beneficial for the organization or not. Salesforce provides various types of reports that you can use according to your requirements. The report data is always produced in real time. When you save a report, its configuration parameters are stored; however, the generated data is not stored. Reports will show the data as per running the user's security access.

We can create reports on both standard and custom objects. Reports are stored in folders and users who have access to these folders can run the reports. In the report, you will get only the records that you have access to, which means the organization's sharing policies and settings will apply to the report.

Understanding report types

By default, Salesforce comes with a few standard report types for standard objects and custom objects. If you select **Allow Reports** from the object setup page, then Salesforce will automatically create a few report types for you. This also allows you to create custom report types to fulfill your requirements. Report types are used to create a report.

Custom report types

Custom report types allow you to build a structure in the report wizard from which users can create and customize reports. You can build custom report types for the relationships (master-detail and lookup) between objects that allow us to do the following:

- They help us choose which standard and custom objects to display to users who create and customize reports
- They help us define the relationships between the objects displayed and the users who create and customize reports
- They help us select which objects' fields can be used as columns in reports

Creating a custom report type

Here, we will create a custom report type to get a list of sponsors who opt for Booth Registration. To create custom report types, follow the ensuing steps:

1. Navigate to **Setup | Build | Create | Report Types**.
2. Click on the **New Custom Report Types** button to create new report types, as shown in the following screenshot:

All Custom Report Types [Help for this Page](#)

With custom report types, you can enable users to create reports from the predefined objects, object relationships, and fields that you specify.

View: All Custom Report Types [Edit](#) | [Create New View](#)

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 **All**

Label ↑	Description	Category	Deployed	Created By Alias	Created Date
No records to display.					

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 **All**

3. It will redirect you to the new custom report type page, where you have to fill in the following details:
 - **Primary Object:** This is used to select primary objects from all objects available in your organization, even those that you don't have permission to view. In our case, we will select the **Sponsor** object.
 - **Report Type Label:** This is used to enter the meaningful report type label. You can use up to 255 characters.
 - **Report Type Name:** This is used to enter the name of the report type.
 - **Description:** This is used to enter a description for your custom report type. You can use up to 1,000 characters.
 - **Store in Category:** This is used to select the category to store the custom report type. In our case, we will select the **Other Report** folder.
 - **Deployment Status:** This is used to select a deployment status. In our case, we will select **deployed**.

Finally, our screen will look like the following screenshot. Then, click on the **Next** button:

Step 1. Define the Custom Report Type Step 1 of 2

Next Cancel

Report Type Focus ! = Required Information

Specify what type of records (rows) will be the focus of reports generated by this report type.
Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object: **Sponsors**

Identification

Report Type Label: **Sponsors who registered for booth**

Report Type Name: **Sponsors_who_registere**

Note: Description will be visible to users who create reports.

Description: **Sponsors who registered for booth**

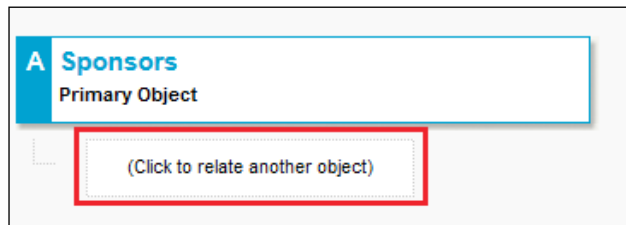
Store in Category: **Other Reports**

Deployment

A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.

Deployment Status: In Development Deployed

4. Now click on the **Click to relate another object** box, as shown in the following screenshot:



Object references can be used as the main four objects, as sources of fields via lookup, or as objects used to traverse relationships.

5. Select the **Booth Registration** object and then select checkbox. Each **A** record must have at least one object related to a **B** record, as shown in the following screenshot:

New Custom Report Type Help for this Page ?

Sponsors who registered for booth

Step 2. Define Report Records Set Step 2 of 2

Previous Save Cancel

This report type will generate reports about Sponsors. You may define which related records from other objects are returned in report results by choosing a relationship to another object.

A Sponsors
Primary Object

B Booth Registrations

A to B Relationship:

Each "A" record must have at least one related "B" record.

"A" records may or may not have related "B" records.

(Click to relate another object)

Previous **Save** Cancel

- Click on **Save**.

[

 You can't provide schedule fields, person account fields, history fields, and the age field on cases and opportunities in custom report types. You can add up to 1,000 fields to each custom report type.

]

Different types of reports

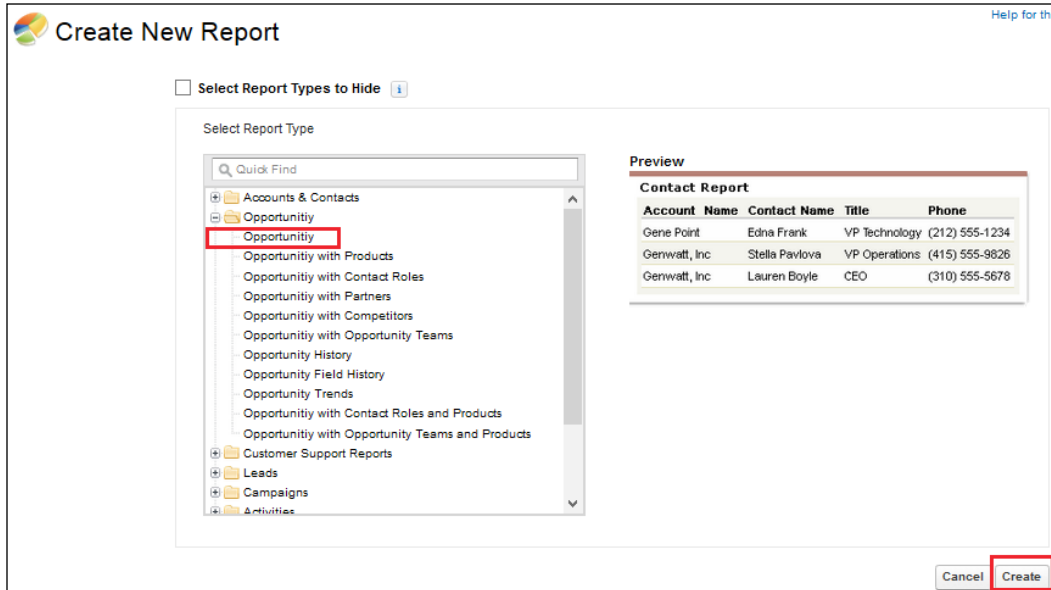
Salesforce provides various types of reports that you can use. The different types of reports are explained in the following sections.

A tabular report

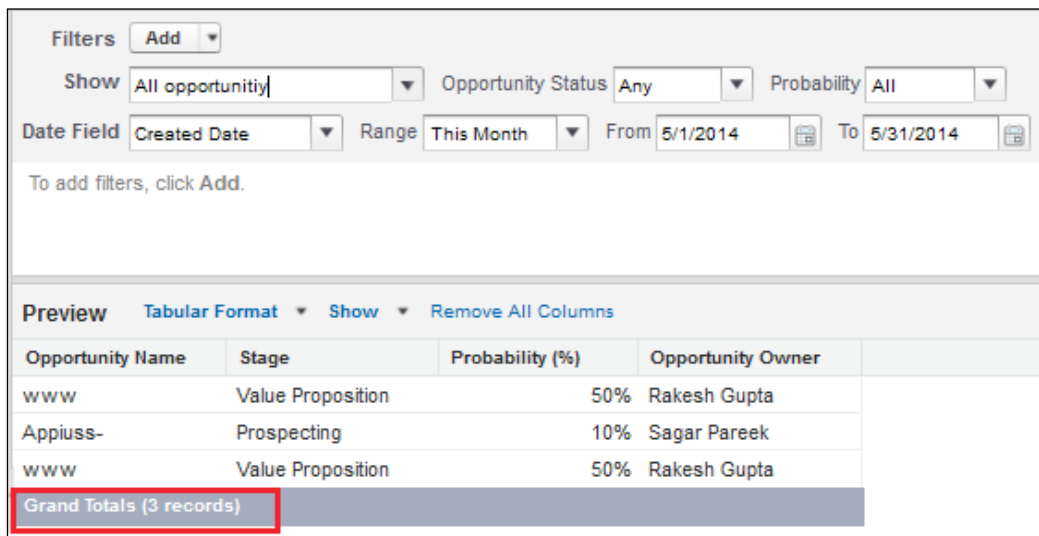
A tabular report is used to display rows of records in a tabular format with the grand total. Let's take an example where you have to display all the opportunities that are created in this month with the grand total. To create a tabular report, follow the ensuing steps:

- Click on the **Reports** tab.


- Now, click on the **New Report** button. It will redirect you to a page where you have to select report types. In our case, we will select the **Opportunity** report types, and click on **Create**, as shown in the following screenshot:



- In the **Date Field**, select **Created Date**, and in **Range**, select **This Month**, and you will see the grand total. Finally, the report will look like the following screenshot:



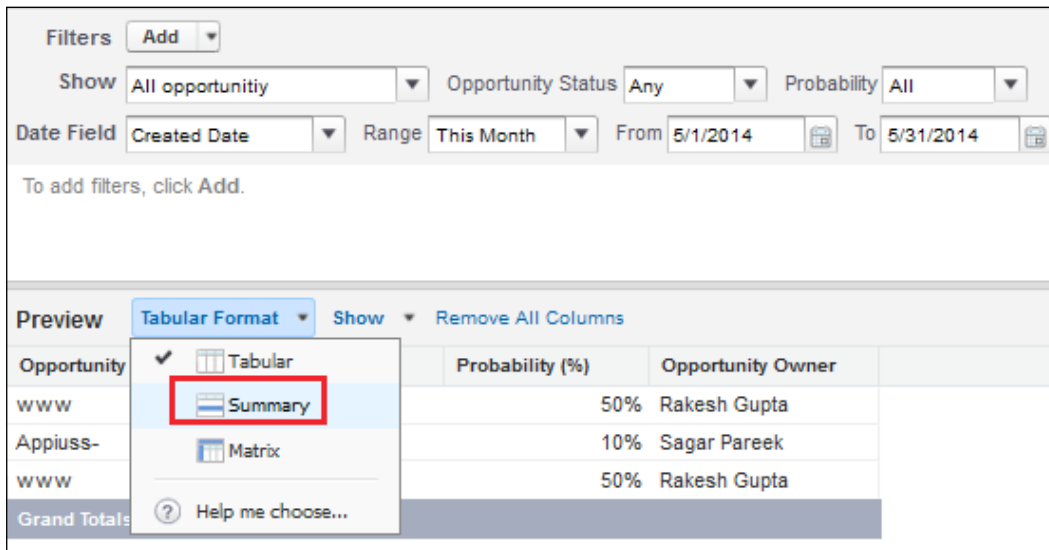
- Click on the **Save** button.

 The tabular report is the only report type that allows you to limit the number of rows displayed.

A summary report

A summary report is used to display the grouping of the rows of data. Let's take an example where you have to display **Opportunity** that is created in this month group stage. You can follow the instructions used in the tabular report. To change the report type, follow these steps:

- Click on **Tabular Format** and select the **Summary** report, as shown in the following screenshot:



The screenshot shows a report configuration interface. At the top, there are filter options: "Filters" with an "Add" button, "Show" set to "All opportunity", "Opportunity Status" set to "Any", and "Probability" set to "All". Below this, "Date Field" is set to "Created Date", "Range" is "This Month", "From" is "5/1/2014", and "To" is "5/31/2014". A note says "To add filters, click Add." Below the filters, there is a "Preview" section. A dropdown menu is open under "Tabular Format", showing options: "Tabular" (checked), "Summary" (highlighted with a red box), and "Matrix". Below the menu, a table preview is visible with columns: "Opportunity", "Probability (%)", and "Opportunity Owner". The table data is as follows:

Opportunity	Probability (%)	Opportunity Owner
www	50%	Rakesh Gupta
Appiuss-	10%	Sagar Pareek
www	50%	Rakesh Gupta
Grand Totals		

2. Drag-and-drop the **Stage** field to group the result, and it will look like the following screenshot:

The screenshot shows a Salesforce report interface. At the top, there are filter controls: 'Filters' with an 'Add' button, 'Show' set to 'All opportunity', 'Opportunity Status' set to 'Any', and 'Probability' set to 'All'. Below this, 'Date Field' is set to 'Created Date', 'Range' is 'This Month', and the date range is from '5/1/2014' to '5/31/2014'. A message says 'To add filters, click Add.' Below the filters is a 'Preview' section with 'Summary Format' selected, 'Show' dropdown, 'Add Chart' button, and 'Remove All Columns' link. The table below has columns 'Opportunity Name', 'Probability (%)', and 'Opportunity Owner'. It is grouped by 'Stage'. The first group is 'Stage: Prospecting (1 Record)' with a 'Hide' link. The second group is 'Stage: Value Proposition (2 Records)'. The table ends with a 'Grand Totals (3 records)' row.

Opportunity Name	Probability (%)	Opportunity Owner
Stage: Prospecting (1 Record)		
Drop a field here to create a grouping. Hide		
Appiuss-	10%	Sagar Pareek
Stage: Value Proposition (2 Records)		
www	50%	Rakesh Gupta
www	50%	Rakesh Gupta
Grand Totals (3 records)		

3. Click on the **Save** button.

A matrix report

A matrix report is the most complex report format. A matrix report allows you to summarize data in a grid format. Matrix reports allow records to be grouped by both columns and rows.

A joined report

A joined report allows you to join two reports in the same place. A very simple use of a joined report is to show a comparison between sales in the current quarter and the last quarter.

A few noteworthy points about reports

The following are some noteworthy points about reports:

- You can create a dashboard only from the matrix and summary reports.
- A maximum of 2,000 rows will be displayed in a report. To view all the rows, export the report to Excel, or use the printable view for tabular and summary reports. For joined reports, the export option is not available, and the printable view displays a maximum of 20,000 rows.
- In the report builder, up to 20 rows will be displayed for summary and matrix reports and up to 50 rows for will be displayed in the tabular report.
- You can use five formulas per report.
- You can use up to 20 field filters in a report.
- To set the maximum number of records to display in a tabular report, click on **Add** and select **Row Limit** in a report builder.
- By default, reports time out after 10 minutes. You can contact Salesforce.com support to extend the time-out limit to 20 minutes for tabular, summary, and matrix reports, but no extension is available for joined reports. It will continue to time out after 10 minutes.
- Reports will show only the first 254 characters in a rich-text area or a long-text area.

Dashboard components and their types

A dashboard is graphical representation of a report. Dashboards will show data from the source report as a graphical component, which can be charts, gauges, and so on. The components provide a snapshot of key metrics and performance meters for your organization. You can use this when the management is interested to know about the numbers and a comparison based on same fields. A user can see all the details in a dashboard whether he has access to it or not, but once he drills down to the report, he will get only those records to which he has access. Dashboard components can be charts, tables, gauges, metrics, or any other component that you can create with Visualforce. A description of each component is as follows:

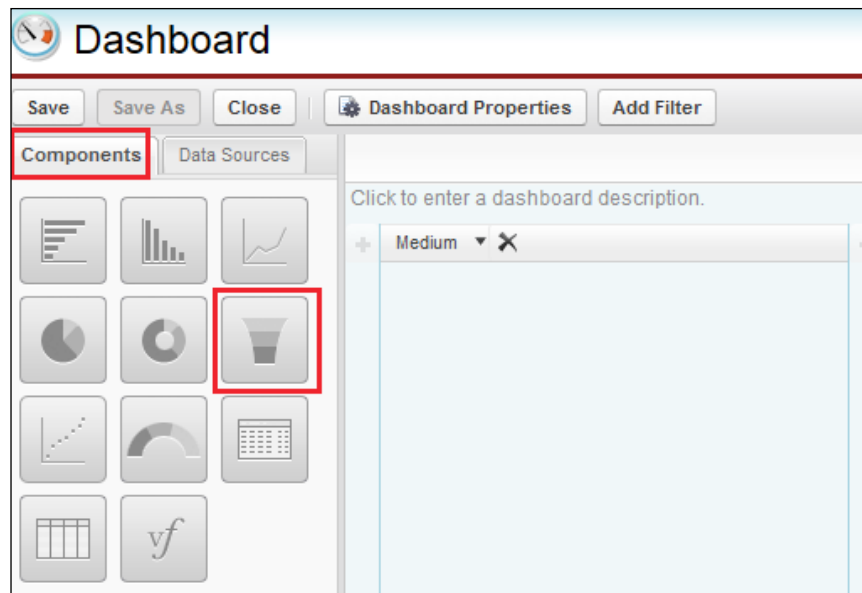
- **Chart:** You can use a chart when you want to show data graphically. You can choose from a variety of chart types.

- **Gauge:** You can use a gauge when you have a single value that you want to show within a range of custom values. For example, to create a dashboard that measures where your current lead amounts fall within a range of values, set **Minimum Value**, **Breakpoint #1 Value**, **Breakpoint #2 Value**, and **Maximum Value** for the gauge. The ranges that you set can indicate poor, acceptable, and good performance. You can set appropriate colors for each of these ranges to visually indicate progress.
- **Metric:** You can use a metric when you have one key value to display. For example, if you have a report that shows the total amount for all leads based on origin Web, phone, and newspaper for the current month, you can name that value and use it as a potential revenue target for the month displayed on the dashboard.
- **Table:** You can use a table to show a set of report data in a column form, for example, to see the top 20 accounts based on revenue.
- **Visualforce page:** You can use a Visualforce page when you want to create a custom component or when your requirement is not fulfilled by the available component.
- **Custom S-control:** Use custom S-controls when you want to display any type of content in a browser, for example, a Java applet, an Active-X control, an Excel file, or a custom HTML web form.

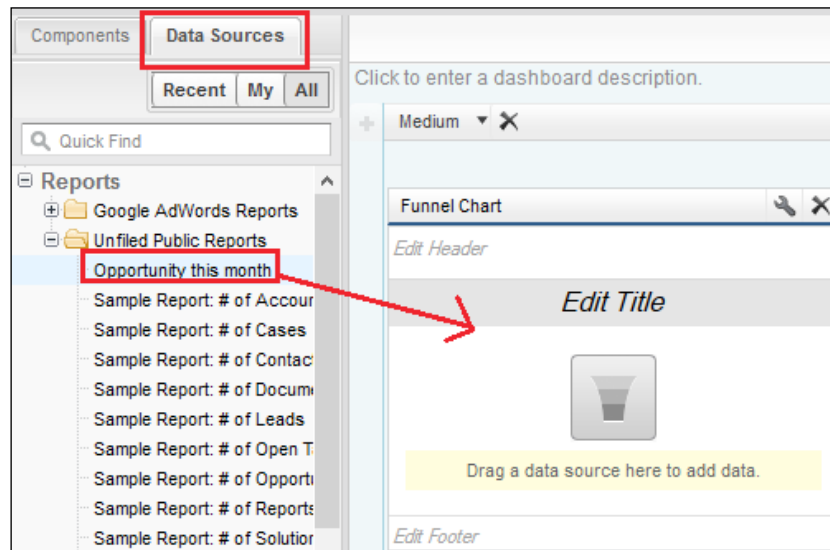
Creating a dashboard

Only a system administrator or a user who has **Run Reports** and **Manage Dashboards** permissions can create a dashboard. We will create a dashboard from the summary report. To create a dashboard, follow these steps:

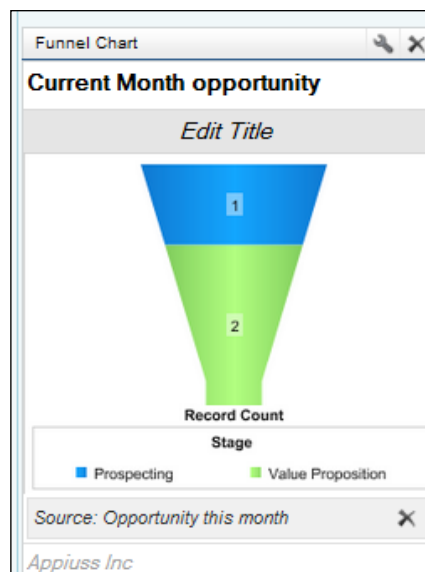
1. Click on the **Dashboard** tab.
2. Click on the **Go To Dashboard List** link available at the top-left corner of the page.
3. Click on the **New Dashboard** button to create a new dashboard.
4. Click on the **Components** tab and drag-and-drop the component on the dashboard builder. In our case, we will use the funnel chart as shown in the following screenshot:



5. Click on the **Data Sources** tab and drag-and-drop the report into the component, as shown in the following screenshot:



6. You can set **View Dashboard** as a filter. There are two possible options provided by Salesforce:
 - **Run as specified user:** By using this setting, all users will see the same data in the dashboard.
 - **Run as logged-in user:** If you select this, then the user will see the data according to his or her access rights. Also, you can't schedule a dashboard once you select this option.
7. Optionally, you can edit the header and footer, and finally your dashboard will look like the following screenshot:



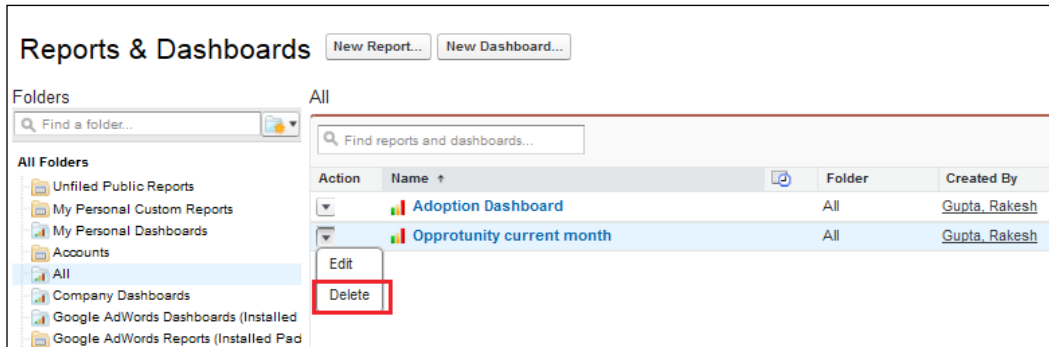
8. Click on **Save**.

Deleting a dashboard

If you no longer need a dashboard, you can delete it from the system. To delete a dashboard, follow these steps:

1. Click on the **Dashboards** tab.
2. Click on the **Go To Dashboard List** link available at the top-left corner of the page.
3. Choose the folder where you have stored the dashboard.

- Click on the **Delete** link next to the name of the dashboard, as shown in the following screenshot:



- Once you delete the dashboard, it is moved to the recycle bin. Deleting a dashboard also deletes the components within it. However, it doesn't delete the custom reports used by the components.

A few noteworthy points about dashboards

The following are the noteworthy points about dashboards:

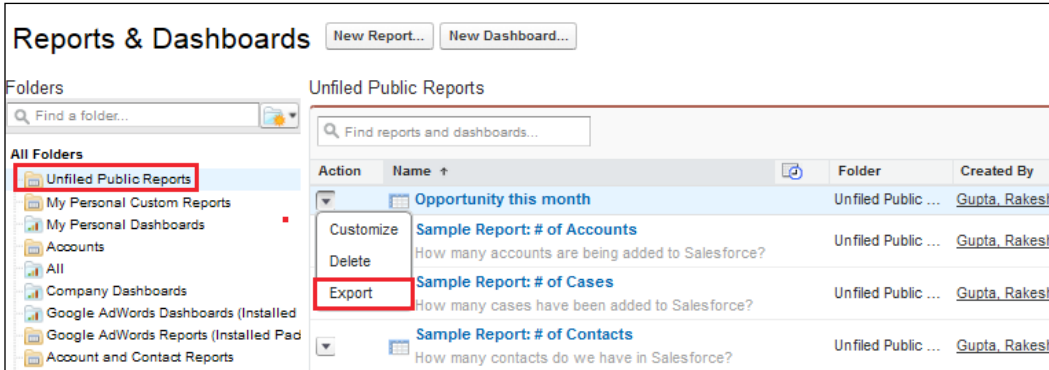
- A dashboard filter can have up to 50 options. By default, 10 options are enabled. If you want to enable more, contact the Salesforce.com support team to extend your limit.
- Each dashboard can have up to 20 components.
- A dashboard table or chart can display up to 20 photos.
- You must wait at least one minute between dashboard refreshes.

Exporting a report

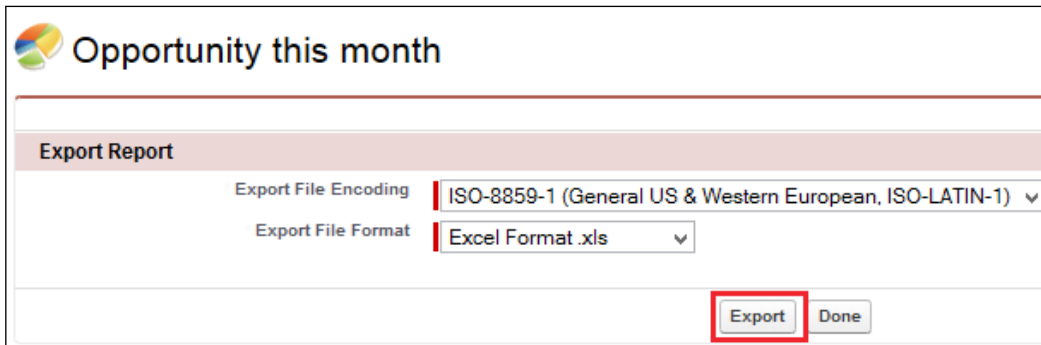
Salesforce provides a way to export reports in an Excel or CSV format. Let's take an example where your manager wants to get all records from a report in an Excel format to share it with the higher management. To export a report, follow these steps:

- Click on the **Reports** tab.

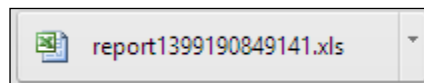
2. Navigate to the report folder, and click on the **Export** link next to the name of the report, as shown in the following screenshot:



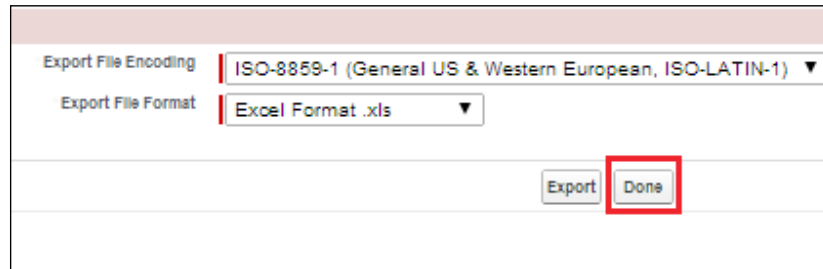
3. It will redirect you to a screen where you have to select **Export File Encoding**. In our case, we will leave it as default. Using **Export File Format**, you can select Excel or CSV. In our case, we will select **Excel Format.xls** as shown in the following screenshot:




4. Click on **Export**. The file will be downloaded on your system:



- Click on **Done** as shown:



When exporting reports in the CSV format, the locale settings on your user detail page determine the field separator (delimiter) included in the exported file. For example, if your locale setting is English (United States), the decimal separator is a period ("."). If your locale setting is French (France), the decimal separator is a comma (","). You can override the default separator for your locale by choosing the **Comma Delimited (non-locale) .csv** option from the **Export File Format** drop-down list.

 You can export up to 256 columns and 65,536 rows of data in one report. You can also get the export report option when you run a report.

Exporting reports in the background

When you are exporting large amount of data such as 40,000 records, it will take time and sometimes may time out such that your export will fail. You can use export reports in the background so that you can continue working in Salesforce without waiting for the report results to display. Contact Salesforce.com to activate this feature for your organization.

Exporting reports in a printable view

The printable view of a report retains the format and summary information of a report. This includes the **Custom Summary Formula** fields. The **Export Details to Excel** option will produce only the detail rows. With only the detail rows available, the exported file is raw data that can be easily modified. To export a report in a printable format, follow these steps:

- Click on the **Reports** tab.
- Navigate to the report folder and click on the **Report Name** link to open the report.

3. Click on **Printable View**, as shown in the following screenshot:

The screenshot shows the Salesforce report interface. At the top, there is a toolbar with buttons: Run Report, Hide Details, Customize, Save, Save As, Delete, **Printable View** (highlighted with a red box), and Export Details. Below the toolbar, the report is grouped by 'Stage' and sorted by 'Stage' in ascending order. The report data is as follows:

Opportunity Name	Probability (%)	Opportunity Owner
Stage: Prospecting (1 record)		
Appiuss-	10%	Sagar Pareek
Stage: Value Proposition (2 records)		
www	50%	Rakesh Gupta
www	50%	Rakesh Gupta
Grand Totals (3 records)		

At the bottom, there is a filter section: 'Check rows to filter, then drill down by: --None--' with a 'Drill Down' button.

4. Save the file and open it in any browser, and you will see what is shown in the following screenshot:

The screenshot shows the printed output of the report. It includes the following information:

Filtered By:
Date Field: Created Date equals This Month (5/1/2014 to 5/31/2014)
Show: All opportunity
Opportunity Status: Any
Probability: All

Sorted By:
Stage: Stage - Sorted ascending

Opportunity Name	Probability (%)	Opportunity Owner
Stage: Prospecting (1 record)		
Appiuss-	10%	Sagar Pareek
Stage: Value Proposition (2 records)		
www	50%	Rakesh Gupta
www	50%	Rakesh Gupta
Grand Totals (3 records)		

The printable view displays a maximum of 20,000 rows. To view all the rows, use the printable view for tabular and summary reports, or you can export these in Excel. For joined reports, export is not available, and the printable view displays a maximum of 20,000 rows.

Sharing reports and dashboards

Sometimes, it is necessary to share reports with your team members. Let's take an example where the system administrator created one report and wants to share it with the sales director. You can share reports with your colleagues using the following methods:

- Folder sharing
- Schedule reports
- Schedule dashboards

Folder sharing

If you want to share reports with Salesforce users, then you can use the folder share method. Reports are shared by sharing the folder of the reports in which they are located. Sharing can be done among following:

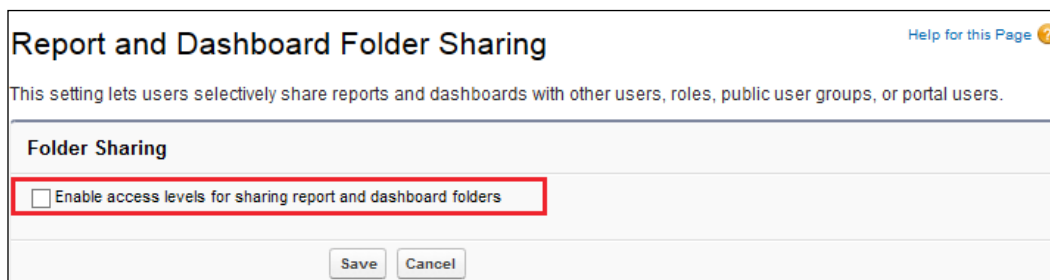
- Public groups
- Roles
- Role and internal subordinates
- Users
- Roles, internal, and portal subordinates

Whenever you create any report folder, Salesforce automatically makes you the manager of this folder and other users with administrative permissions can see it. You can decide which public groups, roles, and roles and its subordinates can access this reports folder.

Enabling enhanced sharing for reports and dashboards

If you want to share the report folder with users, then you have to enable folder sharing for your organization. To do that, follow these steps:

1. Navigate to **Setup | Build | Customize | Reports and Dashboards | Folder Sharing**.
2. Select the **Enable access levels for sharing report and dashboard folders** checkbox as shown in the following screenshot:

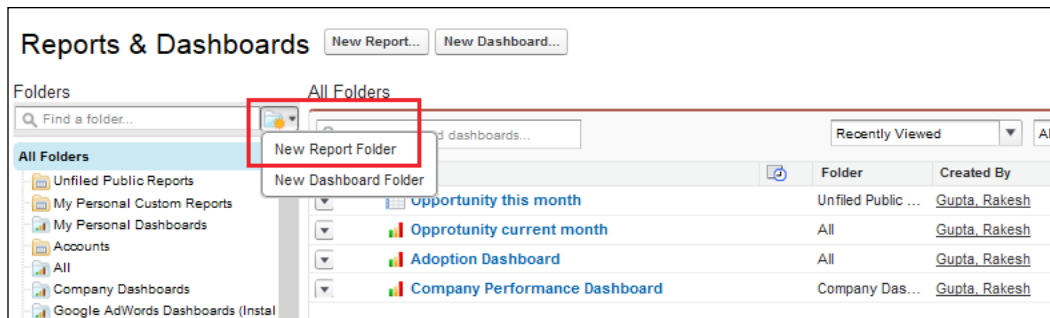


3. Click on **Save**.

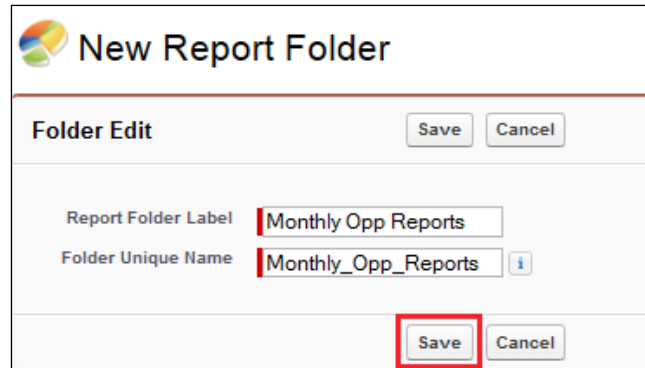
Creating new reports and dashboard folders

To create a new report and dashboard folder, follow these steps. In this example, we will create **New Report Folder**:

1. Click on the **Reports** tab.
2. Click on the folder icon and then select the **New Report Folder** option, as shown in the following screenshot:



3. Enter data in **Report Folder Label** and **Folder Unique Name**, as shown in the following screenshot:



The screenshot shows a dialog box titled "New Report Folder". It has a "Folder Edit" section with "Save" and "Cancel" buttons. Below this, there are two input fields: "Report Folder Label" with the value "Monthly Opp Reports" and "Folder Unique Name" with the value "Monthly_Opp_Reports". At the bottom, there are "Save" and "Cancel" buttons, with the "Save" button highlighted by a red rectangle.

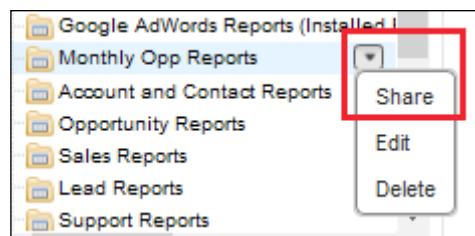
4. Click on **Save**.

Likewise, you can create a folder for dashboards.

Sharing reports and a dashboard folder

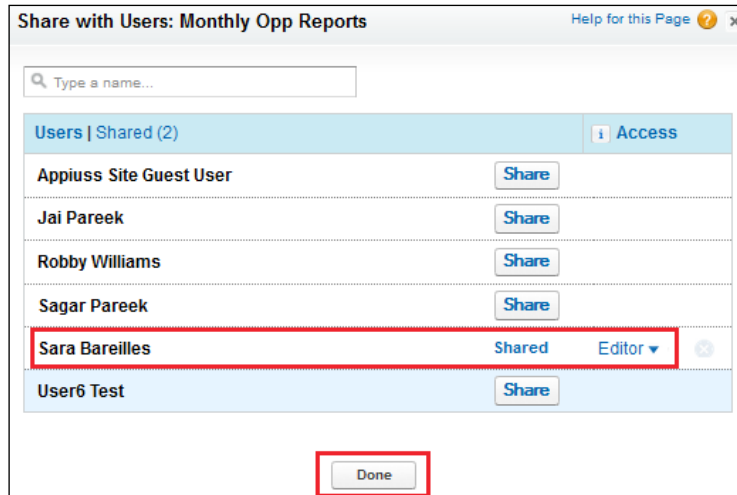
In this example, we will share a report folder that we created in the previous section with the user Sara Bareilles. To share a report folder with users, follow these steps:

1. Click on the **Reports** tab.
2. Click on the **Share** option on the folder, as shown in the following screenshot:



3. Select **Users**.

4. Find the user you want. In our case, it's **Sara Bareilles**. Click on the **Share** button, and choose an access level.



5. Click on **Done**, review your changes, and click on **Close**.

Likewise, you can share the dashboards folder with users.

Scheduling a report

Sometimes people at the higher management don't want to log in to Salesforce to view the report. In that case, you can schedule the report for future run and distribute it among users. In this example, we will use the user Sara Bareilles to send a schedule report. To schedule a report for future run, follow these steps:

1. Click on the **Reports** tab.
2. Click on the existing report name.
3. Click on the **Run Report** dropdown, and select the **Schedule Future Runs** option, as shown in the following screenshot:

The screenshot shows a report interface with a top navigation bar containing buttons: Run Report (dropdown), Hide Details, Customize, Save, Save As, Delete, Printable View, and Export Details. A dropdown menu is open under 'Run Report', with 'Schedule Future Runs...' highlighted in a red box. Below the menu, there are filters for 'Grouped by: Stage' and 'Sorted By: Stage ↑'. The main table displays opportunity data:

	Opportunity Name	Probability (%)	Opportunity Owner
<input type="checkbox"/>	Stage: Prospecting (1 record)		
	Appiuss-	10%	Sagar Pareek
<input type="checkbox"/>	Stage: Value Proposition (2 records)		
	www	50%	Rakesh Gupta
	www	50%	Rakesh Gupta
Grand Totals (3 records)			

4. It will redirect you to schedule a report page where you have to enter a few details. Specify the running user who has access to the folder where the report is saved. The access level of the running user determines what other users, including portal users, see when they receive the scheduled report run results. In our case, we will select the admin user (that is, Rakesh Gupta).
5. Select the **Email Report** settings. In our case, we will select **To me and/or others** and select **Sara Bareilles**.
6. Set the frequency, duration, and time for running the report, as follows:
 - In the **Frequency** field, you can select **Daily**, **Weekly**, or **Monthly**, and then refine the frequency criteria. In our case, we will select **Daily**.
 - Using the **Start** and **End** date fields, specify the dates during which you want to schedule the report. To enter the current date, click on the link that shows the date. Set it as per your choice.
 - Next, to set **Preferred Start Time**, click on **Find available options** to choose a start time. Your preferred start time might not be available if other users have already selected that time to schedule a report. Set **Preferred Start Time** to **12:00 AM**.

7. For the **Save Changes** field, select the **Discard report modifications** option. Finally, our schedule report page will look like the following screenshot:

The screenshot shows the 'Schedule Report' dialog box in Salesforce. At the top, there are 'Save Report Schedule' and 'Cancel' buttons. Below that, the 'Running User' is set to 'Rakesh Gupta'. The 'Email Report' section has two radio buttons: 'To me' (unselected) and 'To me and/or others...' (selected). Below this is a search area with 'Search: Users' and a 'Find' button. There are two lists: 'Select From' containing 'User: Rakesh Gupta' and 'Send Email To' containing 'User: Sara Bareilles'. Between these lists are 'Add' and 'Remove' buttons. The 'Schedule Report' section has a 'Frequency' section with radio buttons for 'Daily' (selected), 'Weekly', 'Monthly', 'Every weekday' (selected), and 'Every day'. Below this are 'Start' and 'End' date pickers. The 'Start' date is '5/8/2014' and the 'End' date is '6/3/2015'. There is also a 'Preferred Start Time' dropdown set to '12:00 AM'. A note below says 'Exact start time will depend on job queue activity.' At the bottom, the 'Save Changes' section has two radio buttons: 'Save report modifications with this schedule' (unselected) and 'Discard report modifications' (selected). Finally, there are 'Save Report Schedule' and 'Cancel' buttons at the very bottom.

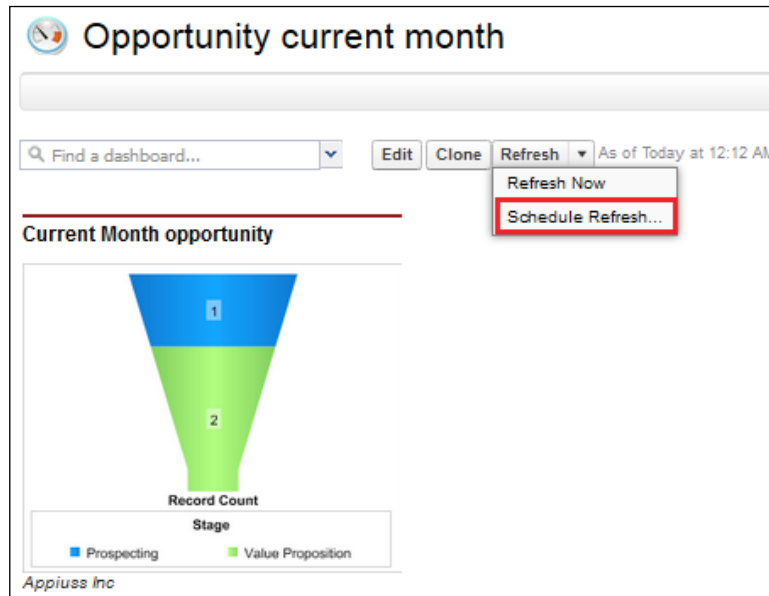
8. Click on the **Save Report Schedule** button.

Scheduling a dashboard

You can also schedule a dashboard refresh to distribute it to users. The feature to schedule dashboards is only available in Enterprise, Unlimited, and Performance Editions. To schedule a dashboard with a user, follow these steps:

1. Click on the **Dashboard** tab.

2. Select an existing dashboard using the **View Dashboard** field.
3. Click on **Refresh** and then select the **Schedule Refresh** option as shown in the following screenshot:



4. Follow the instructions from steps 4 to 8 from the schedule report.

A few noteworthy points on the report and dashboard schedule

The following are some noteworthy points about the report and dashboard schedule:

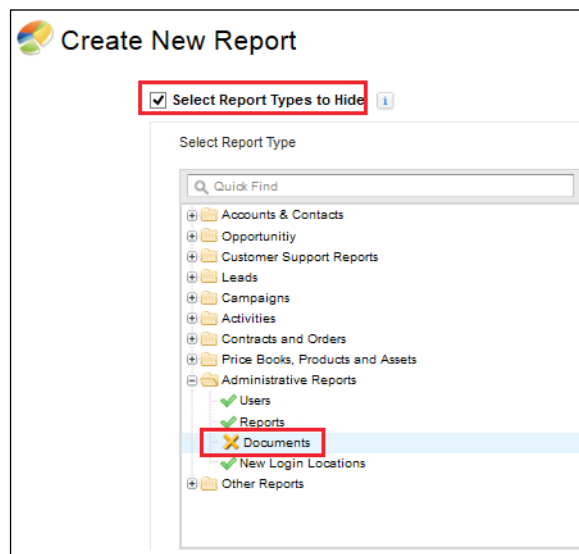
- If the running user becomes inactive, the report is not run. The system administrator will get an e-mail notification to either activate the user or delete the report scheduled, or change the running user to an active one in the scheduled report.
- The limit for scheduled reports per organization is one or two based on editions.
- An organization is limited to 200 scheduled reports and dashboards. Daily limits differ by edition. You can purchase additional schedule reports or dashboards.
- A joined report can't be scheduled for future runs.

- Scheduled reports run in the time zone of the user who set up the report schedule. Let's take an example. If the **Time Zone** field on your user record is set to **Indian Standard Time**, and you schedule a report to run every day at 3:00 PM, then the report runs every day between 3:00 PM and 3:29 PM as per Indian Standard Time.
- The maximum size for e-mailed reports is 10 MB.
- For Enterprise Edition, you are only permitted one dashboard refresh per user, per hour, and for Unlimited Edition this limit is two. If you want to increase this slot, you have to purchase additional refresh slots. To do that, contact the Salesforce.com support team.

Hiding unused report types

If you have plenty of unused report types and you want to hide them so that the user can't see these report types while creating a report, follow these steps:

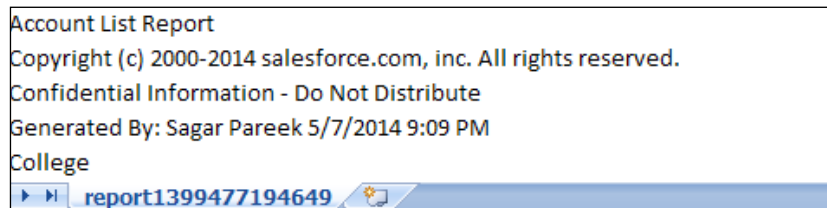
1. Click on the **Reports** tab.
2. Click on the **New Report** button.
3. Select the **Select Report Types to Hide** checkbox and now go to the folder of the reports type.
4. Click on the report type to hide. The green check in front of the report type denotes that it is visible. Once you click on it, it will turn into an **X** symbol, which means that it is no longer visible. It will look like the following screenshot:



The next time user creates a new report, these report types you have hidden will no longer be visible to them.

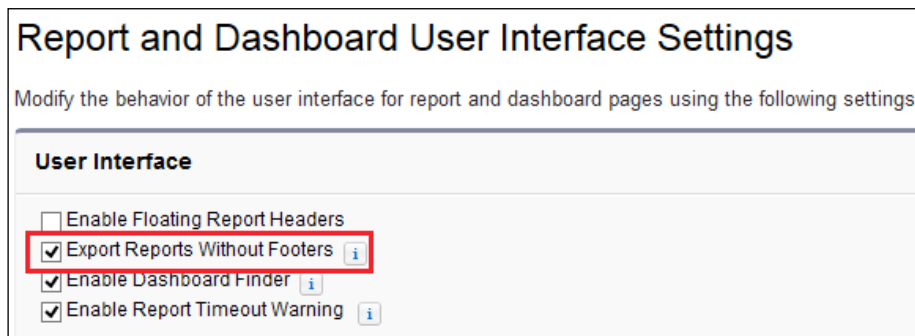
Exporting reports without footers

Whenever you export any report from Salesforce, it always has a few lines of footer with some information, as shown in the following screenshot:



If you do not want such footers in exported reports, you can perform the following steps to stop this footer:

1. Navigate to **Setup | Build | Customize | Reports and Dashboards**.
2. Go to the user interface section and select the **Export Reports without Footers** checkbox, as shown in the following screenshot:



3. Click on **Save**.

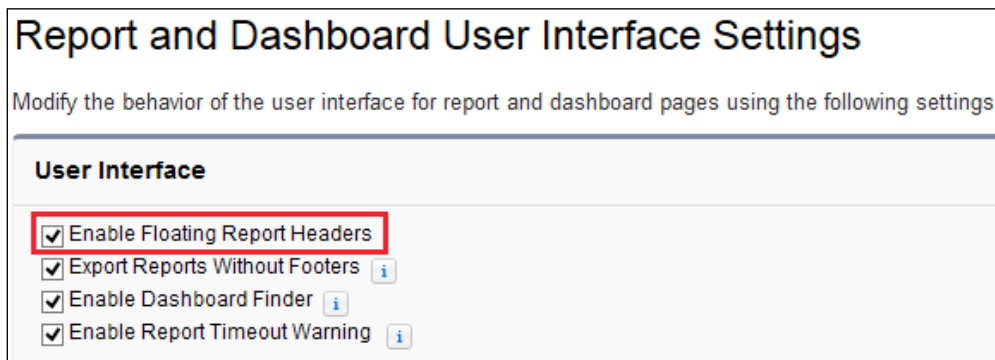
Floating headers in summary and matrix reports

When you are viewing a summary or matrix report in Salesforce and there is a lot of data, a situation comes when the headers of the table are about to disappear. Salesforce provides floating table headers in matrix and summary reports. It doesn't matter how much you scroll down, the header will remain with the data.

Enabling floating report headers

To enable this feature for your organization, follow these steps:

1. Navigate to **Setup | Build | Customize | Reports and Dashboards**.
2. Go to the user interface section and select the **Enable Floating Report Headers** checkbox, as shown in the following screenshot:




3. Click on **Save**.

Using the floating header in reports

Normally, when the data fits onto your screen, the headers are at their normal position, as shown in the following screenshot:

Account Owner	Account Name	Created Date	Created By	Last Modified Date	Billing State/Province
Type: Analyst (1 Record)					
Drop a field here to create a grouping. Hide					
Rakesh Gupta	Test B	5/9/2014	Rakesh Gupta	5/9/2014	-
Type: Competitor (1 Record)					
Rakesh Gupta	Test J	5/9/2014	Rakesh Gupta	5/9/2014	-
Type: Customer (1 Record)					
Rakesh Gupta	Test E1	5/9/2014	Rakesh Gupta	5/9/2014	-
Type: Integrator (1 Record)					
Rakesh Gupta	Rakesh Gupta	5/9/2014	Rakesh Gupta	5/9/2014	-
Type: Press (1 Record)					
Rakesh Gupta	Test E	5/9/2014	Rakesh Gupta	5/9/2014	-
Type: Reseller (1 Record)					
Rakesh Gupta	Test F	5/9/2014	Rakesh Gupta	5/9/2014	-
Type: Other (1 Record)					
Sagar Pareek	Packt Publishing	3/22/2014	Rakesh Gupta	4/28/2014	West Midlands
Type: Partner (2 Records)					

However, when you scroll down, the headers will float with the data just under the address bar of your browser so that you may not miss or misread any information. If you wish to hide these floating headers, you can click on the [] icon, which is located just below the floating headers bar.

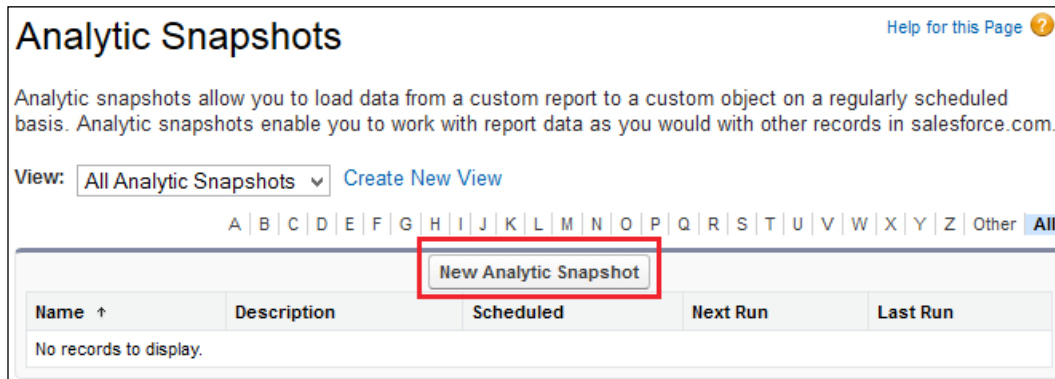
Analytical snapshot

Analytical snapshot in Salesforce helps you to build trend reports, which are based on historical data. You can use tabular or summary reports as the source report in an analytical snapshot. The column from the report is mapped to the fields in an object.

Let's take an example, where the CEO of Appiuss Inc. has asked the system administrator to build a monthly, historical trend report based on the **Opportunity this month** report he created for tabular reports to compare the opportunity statuses of the current month and last month. To do this, follow these steps:

1. Build a summary or tabular report. We have already built a report under the summary report topic.
2. Consider the fields you need to track to build a trend report (in our case, we will track **Opportunity Name, Stage, and Probability%**).
3. Create a custom object named **Opportunity track**.

4. Create three fields in the **Opportunity track** custom object with the **Account Opportunity Name**, **Stage**, and **Probability%** names and text as the data type.
5. Navigate to **Setup | Administer | Data Management | Analytic Snapshots**.
6. Click on the **New Analytic Snapshot** button, as shown in the following screenshot:



7. It will redirect you to the **New Analytic Snapshot** page where you have to enter a few details as follows:
 - **Analytic Snapshot Name:** Enter a meaningful name for the analytic snapshot.
 - **Analytic Snapshot Unique Name:** Enter a unique name.
 - **Description:** Enter a full description about an analytical snapshot so that other users can easily understand why this snapshot is created.
 - **Running User:** Choose a user in the **Running User** field by clicking on the lookup icon. The user in the **Running User** field determines the source report's level of access to data. This bypasses all security settings, giving all users who can view the results of the source report in the target object, access to data they might not be able to see otherwise.
 - **Source Report:** Select a source report from the drop-down menu. In our case, we will select the **Opportunity this month** report.

- **Target Object:** Select a custom object from the **Target Object** drop-down list. In our case, we will select the custom object **Opportunity track**.

In our case, it will look like the following screenshot:

Edit Analytic Snapshot Save Save & Edit Field Mappings Cancel

Enter information about this analytic snapshot. | = Required Inform

Analytic Snapshot Name Opportunity last month

Analytic Snapshot Unique Name Opportunity_last_month

Description This analytical snapshot save opportunity data for lat month

Running User rakesh gupta

An analytic snapshot runs a source report, then loads the report data as records into a target object. Select a source report and target object.

Source Report Target Object

Source Report Opportunity this month

Target Object Opportunity track

Save Save & Edit Field Mappings Cancel

8. Click on the **Save & Edit Field Mappings** button, as shown in the preceding screenshot.

- On the next screen, provide the mapping of the fields between the report header and the custom object fields. You can map the fields according to the following screenshot:

Fields from Source Report Opportunity this month	Map to	Fields in Target Object Opportunity track
--Load No Data--	→	Last Referenced Date (Date/Time)
--Load No Data--	→	Last Viewed Date (Date/Time)
(No fields with compatible data type)	→	Object Access Level (Lookup(User Record Access))
Analytic Snapshot Name	→	Opportunity Name (Text(51))
Opportunity Name	→	Opportunity track Name (Text(80))
(No fields with compatible data type)	→	Owner (Lookup(User,Group))
Probability (%)	→	Probability% (Text(20))
Stage	→	Stage (Text(51))

- Click on **Save**.
- On the next screen, navigate to the **Schedule Analytic Snapshot** list, and click on **Edit**. This will allow you to schedule the run of the snapshot so that historical data can be captured as records in the custom object you created earlier.
- Select the **Email Analytical Snapshot** settings. In our case, we will select **To me and/or others** and then select the system administrator user **Role: VP Sales**.
- Set the frequency, duration, and time for running the report, as follows:
 - In the **Frequency** field, you can select **Daily**, **Weekly**, or **Monthly**, and then refine the frequency criteria. In our case, we will select **Monthly** and the last day of every month.
 - Using the **Start** and **End** date fields, specify the dates during which you want to schedule the report. To enter the current date, click on the link that shows the date. Set it as per your choice.

- Next, to set **Preferred Start Time**, click on **Find available options** to choose a start time. Your preferred start time might not be available if other users have already selected that time to schedule a report. Set **Preferred Start Time** to **12:00 AM**.

Our **Schedule Analytic Snapshot** screen will look like the following screenshot:

Schedule Analytic Snapshot [Save] [Cancel]

Email Analytic Snapshot To me To others...

Search: Roles for: [] [Find]

Select From: Role: CEO, Role: Marketing Agents, Role: Sales Reps, Role: VP Marketing, Role: VP Sales

Add [] Remove []

Send Email To: --None--

Scheduled Run

Frequency: Daily Weekly Monthly

On day last of every month On the 1st Sunday of every month

Start: 5/9/2014 [5/9/2014]

End: 6/7/2016 [5/9/2014]

Preferred Start Time: 12:00 AM

Exact start time will depend on job queue activity.

[Save] [Cancel]

14. Click on **Save**.

Now, on the last day of every month at 12 a.m., the analytical snapshot will start capturing the data from the source report and records will be created in your target object. Upon the completion of this process, an e-mail will be sent to you with details of records that were captured in the analytical snapshot.

A few noteworthy points about analytical snapshots

The following are some noteworthy points about analytical snapshots:

- The maximum number of rows you can insert into a custom object is 2,000
- The maximum number of runs you can store is 200
- The maximum number of source report columns you can map to target fields is 100
- You can only schedule one analytic snapshot to start on any given day on Professional Edition
- An analytic snapshot will fail during a scheduled run if the source report includes more than 100 fields
- An analytic snapshot will fail during a scheduled run if the target object is included in a workflow

Summary

In this chapter, we went through report types and ways to create custom report types. At the beginning of the chapter, we discussed reports and types of reports that exist in Salesforce. Then, we moved ahead and discussed dashboards and their components followed by various concepts related to export reports. We also went through the various methods of sharing reports and dashboards with users. Then, we covered unused report types and exporting report without footers. We also discussed floating header in reports. Finally, we discussed mass analytical snapshots.

In the next chapter, we will discuss various concepts related to Salesforce and how you can be more collaborative in your workplace when you use it.

9

Chatter Configuration

In the previous chapter, we discussed the various report types and ways to create custom report types. We also explored reports and types of reports that exist in Salesforce along with dashboards and their components, followed by various concepts related to export reports, share reports, and dashboards. In this chapter, we will discuss various concepts related to Salesforce Chatter. We will also talk about various new features related to Chatter. The following topics will be covered in this chapter:

- A basic overview of Salesforce Chatter
- Enabling Chatter invites
- Topics for objects
- Branding e-mail notifications
- Chatter group
- The Chatter announcement feature
- Posting e-mail to Chatter groups
- Chatter e-mail settings
- Enabling feed tracking
- Posting a dashboard snapshot to Chatter
- Various features of Chatter

Basic overview of Salesforce Chatter

Chatter is a collaborative product by Salesforce. It helps you to collaborate with users within an organization. Chatter allows users to be updated with the information that is important to them. Users get status updates from other user's profiles and real-time feed updates. Salesforce Chatter is just like Twitter or Facebook where you can share the progress of your work with your colleagues, get updates from the data that matters to you, or create groups to share some information with a specific set of users or groups.

Enabling Salesforce Chatter

Salesforce Chatter is available in the group, Professional, Enterprise, Performance, Unlimited, contact manager, developer, and Database.com editions (Chatter e-mail notifications, Chatter invitations, and customer invitations are not available in this edition). To enable Salesforce Chatter in your organization, follow these steps:

1. Navigate to **Setup | Customize | Chatter | Settings**.
2. Click on the **Edit** button.
3. Select the **Enable** checkbox as shown in the following screenshot:

Learn More...'. The 'Enable' checkbox is checked and highlighted with a red box. At the bottom are 'Save' and 'Cancel' buttons."/>

Chatter Settings [Help for this Page](#)

Chatter is a corporate network that lets your users work together, talk to each other, and share information, all in real time.

Save Cancel


Chatter Settings = Required Information

Turn on Chatter and Global Search features. We have given you a head start—your users may auto-follow a few people or records by default and your search box is in the header. [Learn More...](#)

Enable

Save Cancel

4. Click on **Save**.

 Chatter has been pre-enabled for all organizations since June 2010.

Enabling Chatter invites

By using Chatter invites, users in your organization can invite their clients to private groups of which they are either the manager or owner. To enable Chatter invites, follow these steps:

1. Navigate to **Name | Setup | Customize | Chatter | Chatter Settings**.
2. Click on the **Edit** button.
3. Navigate to the **Coworker Invitations** section and select the checkbox, **Allow Coworker Invitations**. You can also add **Company Email Domains** so they can only send invitation to the user whose e-mail ends with these domains, as shown in the following screenshot:

Coworker Invitations

Open up your corporate network for free! Allow Salesforce.com users to invite coworkers without Salesforce.com licenses to Chatter. Users who accept invitations see only profiles, files, and groups, but can't see any object details unless you grant them a full Salesforce license.

Allow Coworker Invitations

Company Email Domains

appiuss.com

gmail.com

[Add More](#)

At least one domain is required.
For example, yourcompany.com

i Be careful when entering email domains and avoid the use of public domains such as hotmail.com, yahoo.com, or gmail.com. Invited users with email addresses from domains you enter can access your organization's Chatter profiles, files, and groups.

4. Click on **Save**.

Topics for objects

Having topics for objects will help us organize the records to make the search easier in Salesforce. It will also help an organization to have better search management. In addition to this, Salesforce allows you to create custom report types on various topics for objects. For example, here we will enable topics for an **Account** object. To enable topics for this object, follow these steps:

1. Navigate to **Setup | Customize | Topics | Topics for Objects**.

2. Hover your mouse on the **Account** object and select the **Enable topics for Accounts** checkbox. There are two ways to get a suggestion for a topic. One way is by using suggestions from the default fields, that is, by selecting the **Use topic suggestions from default fields** checkbox. The other way is by selecting fields, that is, by unchecking the **Use topic suggestions from default fields** checkbox and selecting a field from a list:

Save		
Object	Enabled	<input checked="" type="checkbox"/> Enable topics for Accounts
Account	Enabled	Topic Suggestions: Accounts Select the fields that you want to use for topic suggestions or use topic suggestions from a default set of fields, if available.
Account Track	Disabled	
Ad Group	Disabled	
Asset	Disabled	
		<input checked="" type="checkbox"/> Use topic suggestions from default fields

3. Click on **Save**.

Creating topics

For example, now we want to create a topic for the accounts. For better management of account records, we will use the topic, **High Priority**. To do this, follow these steps:

1. Click on the account record that you want to assign as a high-priority topic.
2. On the records detail page, click on the **Click to add topics** link, as shown in the following screenshot:

Account
Packt Publishing

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed **Click to add topics** Add Tags

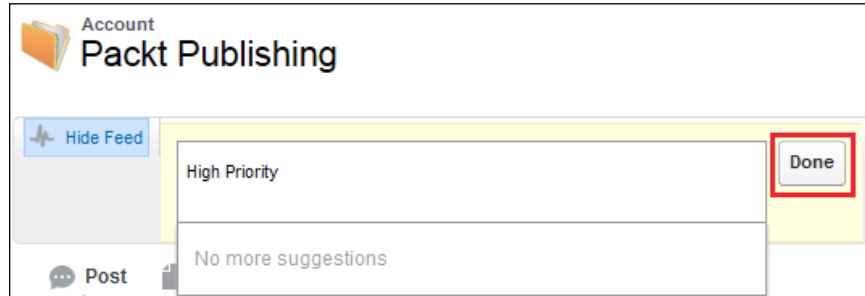
« Back to List: Topic Triggers

[Contacts \[1\]](#) | [Open Activities \[1\]](#) | [Activity History \[0\]](#) | [Opportunity \[2\]](#) | [Cases \[0\]](#) | [Partners \[0\]](#) | [Google Docs, Notes, & Attachments \[0\]](#) | [Approval History \[0\]](#) | [Account Team \[0\]](#)

Account Detail Edit Delete Sharing Include Offline

Account Owner	Sagar Pareek [Change]	Phone
Account Name	Packt Publishing [View Hierarchy]	Fax
Parent Account		Contractor <input type="checkbox"/>
Rating	10	Website http://www.packtpub.com

3. Type the name `High Priority`:



4. Click on **Done**.

In order to make use of the created topic, we can make a separate list view where we can filter only these records where the topic is set as **High Priority**, as shown in the following screenshot:

 A screenshot of a configuration interface for creating a list view. At the top, there are 'Save' and 'Cancel' buttons. The interface is divided into two main sections:

- Step 1. Enter View Name:** This section contains two input fields. The first is labeled 'View Name:' and contains the text 'High Priority'. The second is labeled 'View Unique Name:' and contains the text 'High_Priority'. There is a small 'i' icon to the right of the second field.
- Step 2. Specify Filter Criteria:** This section is for defining filter rules.
 - Filter By Owner:** This section has three radio button options: 'All Accounts' (which is selected), 'My Accounts', and 'My Account Teams'.
 - Filter By Additional Fields (Optional):** This section contains a table with columns for 'Field', 'Operator', 'Value', and a logical connector.

Field	Operator	Value	
Topics	includes	High Priority	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		
 - Add Filter Logic...:** Below the table, there is a note: 'Select a filter language when using "starts with" or "contains" operators.' Below this note is a 'Filter Language:' dropdown menu currently set to 'English'.

The list view created will now show the records as per the topic filter.



In one record, you can have a maximum of 100 topics.

Branding e-mail notifications

Chatter sends you an e-mail when someone follows you and posts on your profile or groups. You can also receive daily or weekly digests with posts and comments from your personal feed and groups. In all these types of e-mails, you can see Salesforce's logo and address.

You can change the sender's name and e-mail address, footer address, and logo. To personalize this e-mail according to your needs, follow these steps:

1. First, we will upload our company's logo on the **Document** tab. To do this, click on the **Documents** tab.
2. Select **Shared Documents** as the folder and click on the **New Document** button.
3. Name the file `Appiuss logo` and select an image from your workstation that must not be more than 150 x 150 pixels in size. Make sure it is marked as **Externally Available Image**, as shown in the following screenshot:

The screenshot displays the Salesforce document creation interface, divided into three main sections:

- 1. Enter details:** This section contains several input fields and a checkbox. The 'Document Name' field is filled with 'Appiuss Logo'. The 'Document Unique Name' field is filled with 'Appiuss_Logo'. The 'Indicate Document is Internal' checkbox is unchecked. The 'Externally Available Image' checkbox is checked and highlighted with a red box. The 'Folder' dropdown menu is set to 'My Personal Documents'. The 'Description' text area contains 'Appiuss logo'. The 'Keywords' text area contains 'Appiuss'.
- 2. Select the File:** This section offers two options for file selection. The first option, 'Enter the path of the file or click browse to find the file.', is selected. The 'File to upload' field shows 'Appiuss logo.png' with a 'Browse...' button next to it. The second option, 'Create a reference link to the file. Enter a file location that others can access.', is not selected.
- 3. Click the "Save" button:** This section shows a 'Save' button highlighted with a red box. Below it, there is a 'Cancel' button and a note: 'Click the Cancel button to cancel an in-progress upload'.

4. Click on **Save**.
5. Now we will configure the e-mail setting to brand notifications. To do this, navigate to **Setup | Customize | Chatter | Email Settings**.
6. Under the **Sender** section for **From Name**, enter `Appiuss` and the e-mail address as `Admin@appiuss.com`. Select the logo that you just uploaded in documents, and in the footer text, enter `Please don't print this email` that must show on the e-mail under the **Branding** section. It will look like the following screenshot:

Sender

From Name

Email Address

Branding

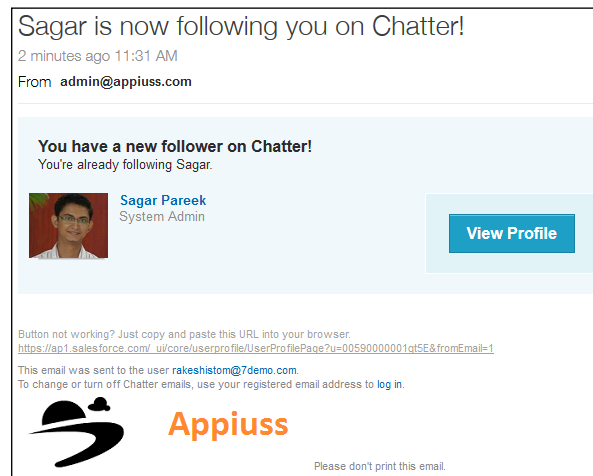
Logo

150 x 50 pixels or less on a transparent background is best.

Footer Text

We strongly recommend including your company's physical address to comply with applicable anti-spam laws.

7. Click on **Save**.
8. Salesforce will send an e-mail alert to the e-mail address mentioned in the **Email address** field with a link to verify the ownership of the e-mail address. Click on the link to verify the e-mail address.
9. In future, you will receive the Chatter e-mail notification that will look like the following screenshot:



Chatter groups

Chatter groups are places where you can collaborate with your project team members or customers. There are two types of Chatter groups:

- **Public:** Anyone can join this type of group, post, add files, or see comments and add posts.
- **Private:** To join a private group, you need permission from the group owner or managers. Only members can see posts, add comments, and add files.

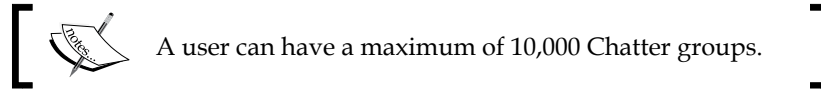
Creating Chatter groups

To create a new Chatter group, follow these steps:


1. Go to the **Chatter** tab and click on **Group** or directly go to the **Group** tab.
2. Click on the **New Group** button.
3. Enter **Group Name** and **Description** (the group name must be unique).
4. You can also select the **Automatic Archiving** option for your group. There are two options:
 - **Archive this group if there are no posts or comments for 90 days**
 - **Don't automatically archive this group**
5. Select the type of access (**Public** or **Private**).

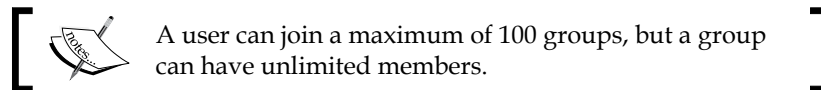
The screenshot shows the 'New Group' form in Salesforce Chatter. At the top, there are buttons for 'Save', 'Cancel', 'Archive', and 'Delete'. The form is divided into two main sections: 'Basic Information' and 'Group Access'. In the 'Basic Information' section, the 'Group Name' field contains 'Dreamforce 14', the 'Owner' field contains 'Rakesh Gupta', and the 'Description' field contains 'This group is dedicated to all who is participating[DF14]'. Under 'Automatic Archiving', the radio button for 'Archive this group if there are no posts or comments for 90 days' is selected. In the 'Group Access' section, the radio button for 'Public' is selected, and the 'Allow Customers' checkbox is also checked. At the bottom of the form, there are buttons for 'Save', 'Cancel', 'Archive', and 'Delete', with the 'Save' button highlighted by a red box.

- Click on the **Save** button.



Joining a group

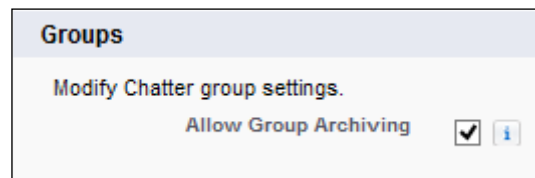
To join a Chatter group, navigate to the **Groups** tab and click on the **All Groups** link under the left-hand side bar. If you are not a member of a specific public group, then you will be able to see the  icon. You can directly join a public group; however, for a private group, you will first need to join, and Salesforce will send an e-mail alert to group owners or managers. They can approve or reject your membership request based on their rules.



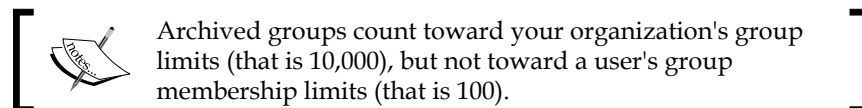
Archiving a Chatter group

Groups in Salesforce that don't have any new feed post or comment for more than 90 days in a row are archived automatically. To enable or disable this feature for your organization, follow these steps:

- Navigate to **Setup | Customize | Chatter | Settings | Edit**.
- Go to the **Groups** section. To disable archiving, deselect the **Allow Group Archiving** checkbox. To allow the archiving option, select this checkbox as shown in the following screenshot:



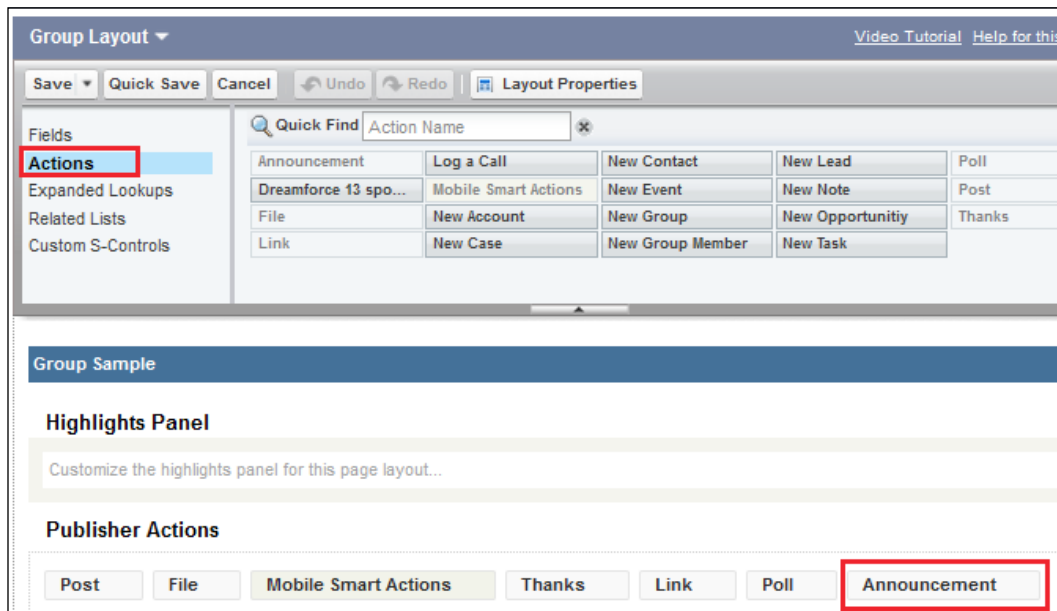
- Click on **Save**.



The Chatter announcement feature

By using the Chatter announcement feature, you can share your words within groups with mass audiences of your organization. It will show as sticky notes on the left-hand side of your Chatter group. To enable Chatter announcement for your organization, follow these steps:

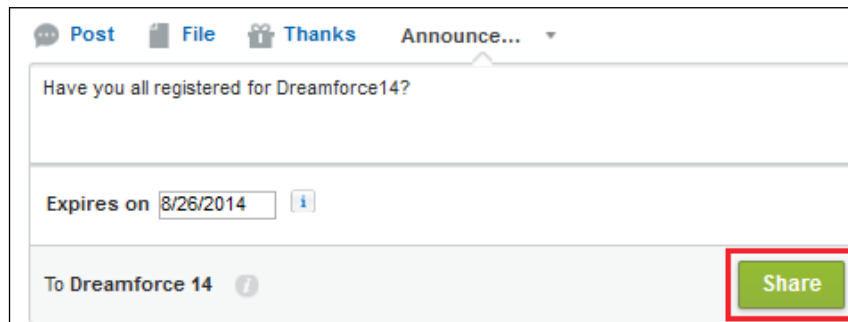
1. Navigate to **Setup | Customize | Chatter | Chatter Groups | Groups Layout** and click on the **Edit** link.
2. From the upper-floating palette on the right-hand side pane, select **Actions** and drag-and-drop the **Announcement** action to the group layout under the **Publisher Action** section, as shown in the following screenshot:



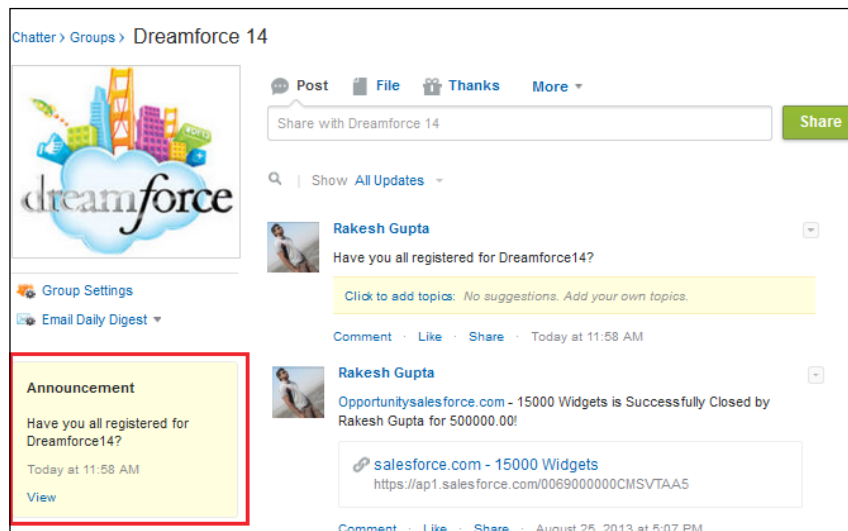
3. Click on **Save**, and now to go to the **Groups** tab.
4. Select the group in which you want to make any announcement. For example, we want to make an announcement in the **Dreamforce 14** group.
5. Now, click on the publisher action, **Announcement**. If it is hidden, click on the **More** option, as shown in the following screenshot:



- Now in the text bar, enter your announcement and enter its expiry date in the **Expires on** field. Once you're done, click on the **Share** button. It will look like the following screenshot:



- The announcement will appear on the Chatter group on the left-hand side panel, as shown in the following screenshot:

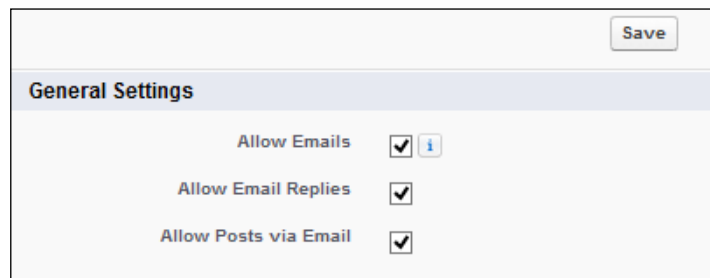


- Group announcements are displayed until 11:59 p.m. on the selected expiration date, unless they're replaced by a new group announcement.

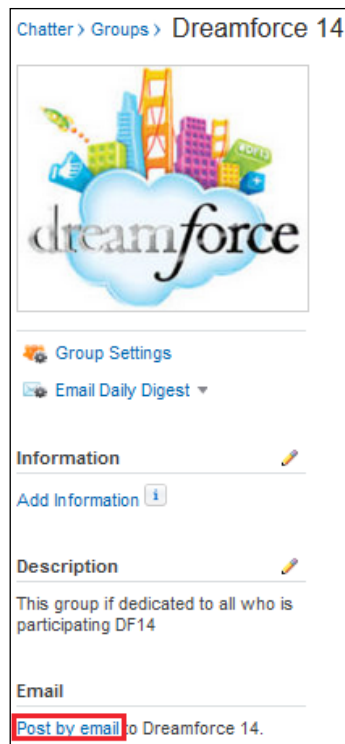
Posting e-mail to Chatter groups

You can allow group users to send e-mails to Salesforce, and this message can be posted to a particular group. In order to do this, you first need to enable **Post by Email** in the Chatter settings menu. To enable the **Post by Email** feature, follow these steps:

- Navigate to **Setup | Customize | Chatter | Email Settings**.
- Under **General Settings**, select the **Post by email** checkbox and also **Allow Posts via Email** to allow the user to reply from their local e-mail client whenever they get any notification related to a group activity, as shown in the following screenshot:



- Click on **Save**.
- Now, navigate to **Chatter | Groups | Dreamforce 14**.
- From the group detail page of your group under the e-mail section,
- click on **Post by email**, as shown in the following screenshot:



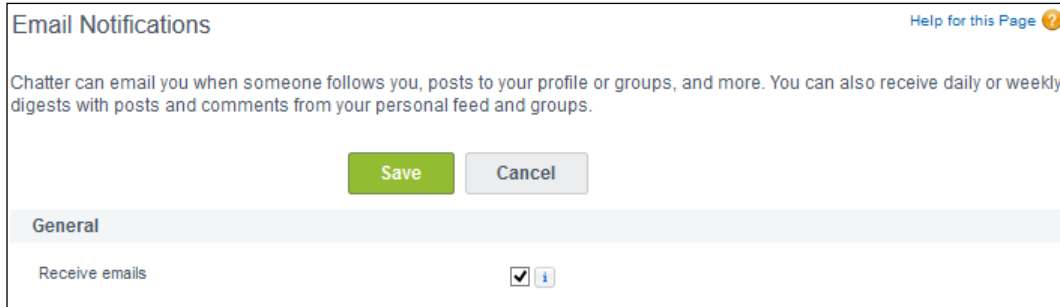
7. Now, this will open up your default e-mail client. You can save the unique e-mail address to post to Chatter without logging in to Salesforce.

Chatter e-mail settings

By enabling the receiving e-mail feature, Salesforce will deliver an e-mail to your inbox every time someone follows you or posts on your profile or groups. You can also receive daily or weekly user and group e-mail digests. Personal digests include updates that you see in your own Chatter feed, such as updates about people, posts linked to your profile, a personal mention in a post or comment, a comment or item that you liked, records, files you followed, and information about your groups. Group digests include the updates you see in a particular group's Chatter feed and are configurable on a group-by-group basis. To configure the Chatter e-mail setting, follow these steps:

1. Navigate to **Name | My Settings | Chatter | Email Notifications**.

2. Go to the **General** section and select the **Receive emails** checkbox to receive e-mail notifications:

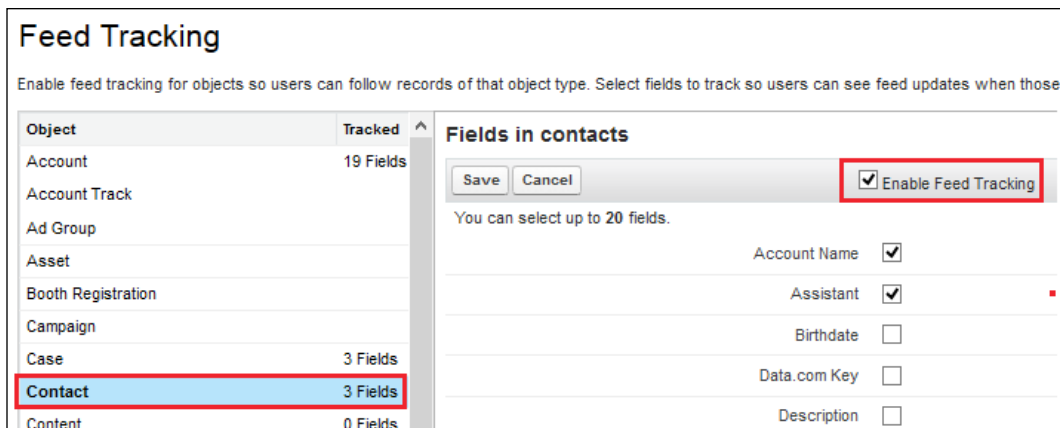


The screenshot shows the 'Email Notifications' configuration page. At the top, there is a 'Help for this Page' link. Below the title, a paragraph explains that Chatter can email users when someone follows them, posts to their profile, or more. There are 'Save' and 'Cancel' buttons. Under the 'General' section, the 'Receive emails' checkbox is checked, and there is an information icon next to it.

3. Select the type of Chatter e-mail you want to receive as per your choice.
4. Click on **Save**.

Enabling feed tracking

Enabling feed tracking provides real-time field updates from objects. If some change has taken place, it will be reflected on your Chatter feed, especially if you are following that record. Only the system administrator can enable feed tracking for standard and custom objects of an organization. To enable the feed-track option, follow the path **Name | Setup | Customize | Chatter | Feed Tracking**. We will enable feed tracking for the **Contact** object by selecting the **Enable Feed Tacking** checkbox, as shown in the following screenshot:



The screenshot shows the 'Feed Tracking' configuration page. It includes a table of objects and a 'Fields in contacts' section. The 'Contact' object is highlighted in blue. In the 'Fields in contacts' section, the 'Enable Feed Tracking' checkbox is checked and highlighted with a red box.

Object	Tracked
Account	19 Fields
Account Track	
Ad Group	
Asset	
Booth Registration	
Campaign	
Case	3 Fields
Contact	3 Fields
Content	0 Fields

Fields in contacts

Save Cancel Enable Feed Tracking

You can select up to 20 fields.

Account Name	<input checked="" type="checkbox"/>
Assistant	<input checked="" type="checkbox"/>
Birthdate	<input type="checkbox"/>
Data.com Key	<input type="checkbox"/>
Description	<input type="checkbox"/>

You can also display the activity of a feed for related objects. To do this, select the **All Related Objects** option at the bottom of the page:

The screenshot shows a dialog box with the title "You can also display feed activity for related objects." Below the title, there is a checkbox labeled "All Related Objects" which is currently unchecked. At the bottom of the dialog, there are three buttons: "Save", "Cancel", and "Enable Feed Tracking". The "Enable Feed Tracking" button has a checked checkbox next to it and is highlighted with a red rectangular border.



Once feed tracking is enabled, you can select a maximum of 20 fields to track. Feed updates that are older than 45 days and have no likes or comments are removed from the feed automatically.

Posting a dashboard snapshot to Chatter

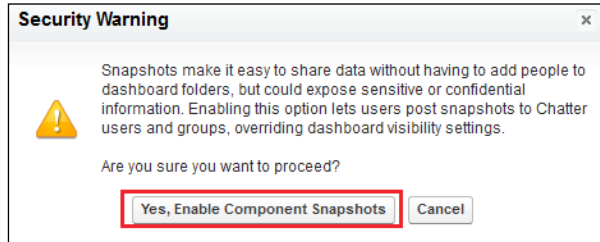
In the previous chapter, we discussed a few ways of sharing dashboards with users. Here, we will discuss another way to share dashboards with users. Let's take an example where you want to share a dashboard with Chatter Free Users or a Chatter group. In this case, you can't grant folder access or use a scheduled dashboard for a future run with Chatter Free Users. However, using a dashboard snapshot of the Chatter feature, you can share a static snapshot of the dashboard with Chatter Free Users. To post a dashboard snapshot to Chatter, follow these steps:

1. First of all, we have to enable the Chatter feed-tracking option for a dashboard. To do this, navigate to **Name | Setup | App Setup | Customize | Chatter | Feed Tracking**.
2. Click on the **Dashboard** object, select the **Enable Feed Tracking** checkbox to enable it, and select all the four fields, as shown in the following screenshot:

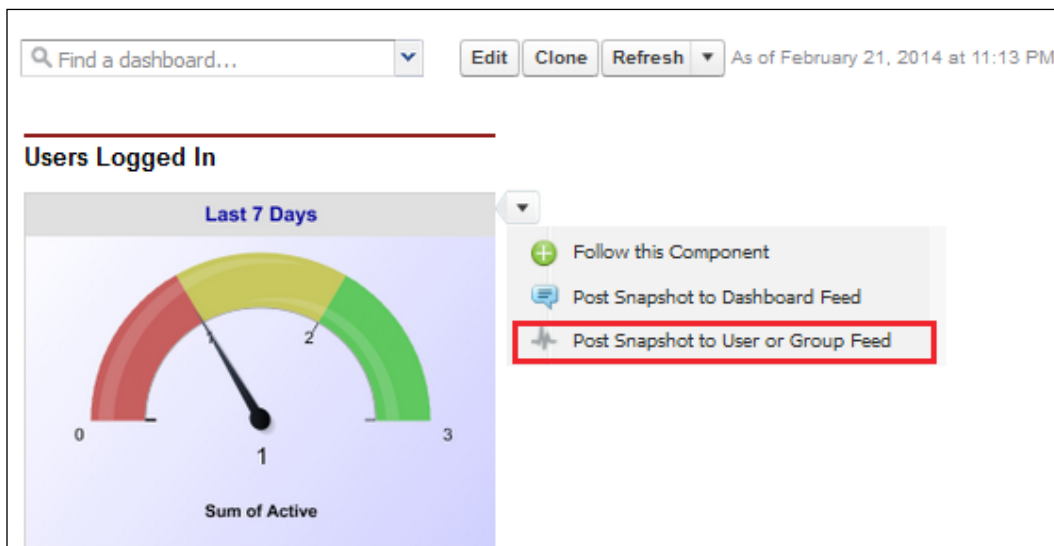
The screenshot shows a dialog box titled "Fields in dashboards". At the top, there are three buttons: "Save", "Cancel", and "Enable Feed Tracking". The "Enable Feed Tracking" button has a checked checkbox next to it and is highlighted with a red rectangular border. To the right of these buttons is a link labeled "Restore Defaults". Below the buttons, the text reads "You can select up to 4 fields." There are four checkboxes, each with a checked mark: "Dashboard Running User", "Dashboard Unique Name", "Description", and "Title".

3. Click on **Save**.
4. Now, we have to enable **Dashboard Component Snapshots**. To do this, navigate to **Name | Setup | App Setup | Customize | Reports & Dashboards | User Interface**.

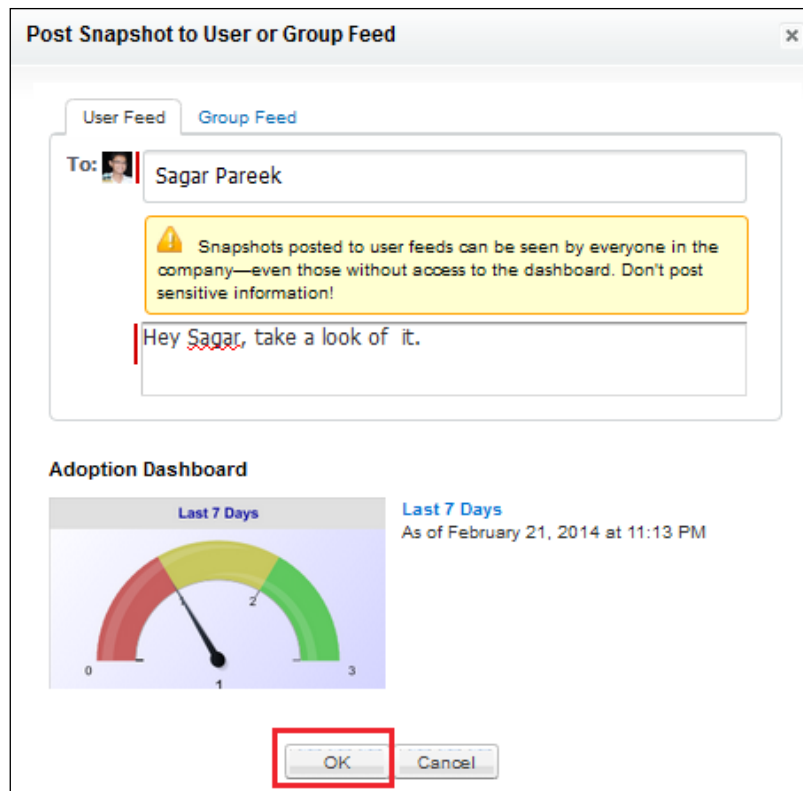
5. Select the **Enable Dashboard Component Snapshots** checkbox; a security warning will pop up. Click on **Yes, Enable Component Snapshots** as shown in the following screenshot:




6. Click on **Save**.
7. Now, navigate to the **Dashboard** tab and select the dashboard that you want to share. Hover over a component to display the [⌵] icon. To clear the hover menu, click on an empty part of the screen. Click on **Post Snapshot to User or Group Feed** as shown in the following screenshot:



8. A window will pop up where you can add a user or Chatter group, and you can also write a comment in the comment box, as shown in the following screenshot:



9. Click on the **OK** button; it will post the dashboard's snapshot to Chatter.

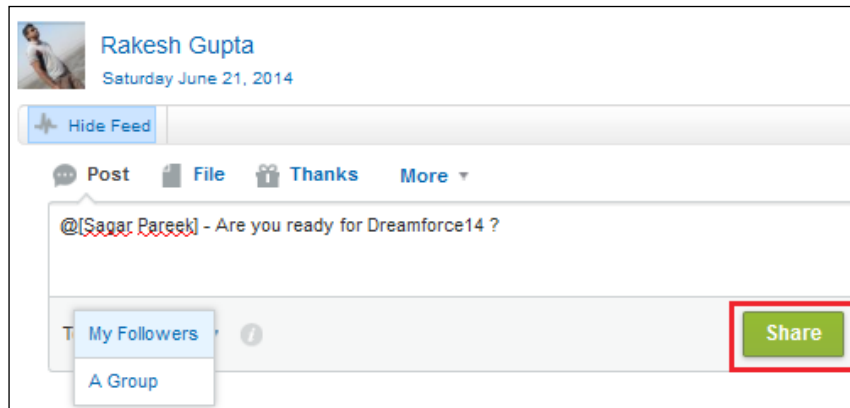

 Dashboard snapshots will be displayed in feeds for four months. After four months, only the comments will remain.


Various features of Chatter

Salesforce Chatter allows you to let people have an insight of you. Additionally, you can share links or files, you can start new polls, and people can vote.

Status update

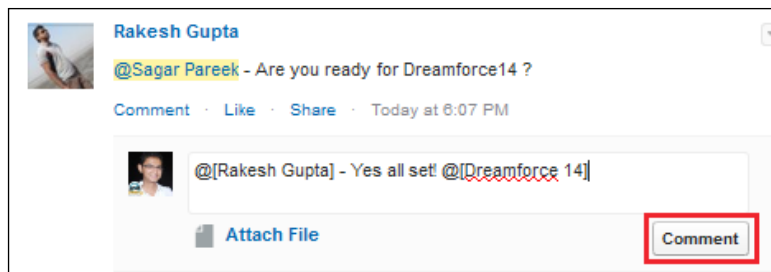
Salesforce Chatter allows you to share with others what you are doing or what you are thinking about. As soon as you post a status, it will be shared with your followers and colleagues. You will also be able to tag people or Chatter groups in your post. To tag people or groups, just use the @mention function, and Salesforce will give you all the relevant users or groups with the exact or similar name in your organization. In the following example, **Rakesh Gupta** is using @Sagar. Once you are done with typing, click on the **Share** button, as shown in the following screenshot:



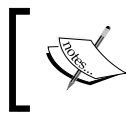
 You can share posts with your followers or within a group.]

Posting a comment

In the preceding example, your followers are allowed to post a comment, like your post, and share or bookmark it. If you want to tag people or Chatter groups in your comment, use @mention. In the following example, the user Sagar Pareek has tagged the user Rakesh Gupta and the Chatter group Dreamforce 14:



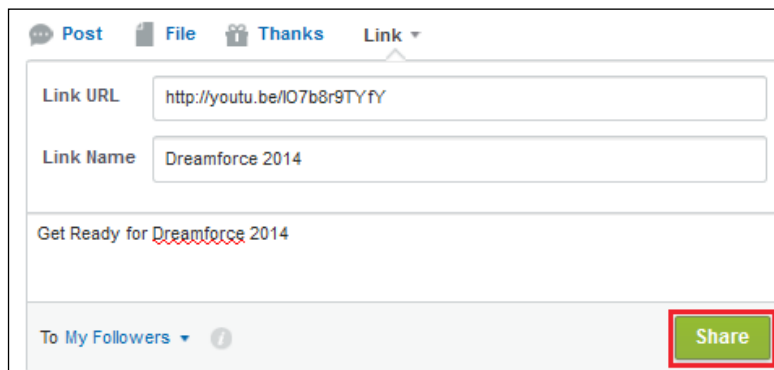
Optionally, you can attach a file while commenting on a post.



You can have a maximum of 5,000 characters in a single post or comment, and you can include a maximum of 25 mentions in a single post or comment.

Adding a link

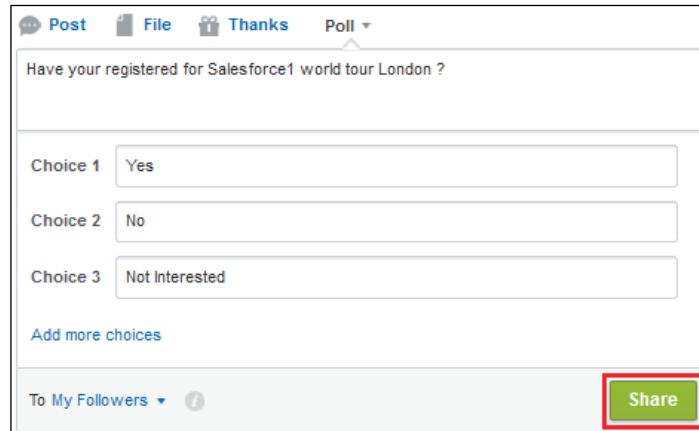
Now, you can share (link) content that you found useful with your followers. It shows your followers that you are someone worth following because of the useful information you would share:



If you want to share a link, click on **Link** and enter **Link URL**, **Link Name**, add a short description, and click on the **Share** button, as shown in the preceding screenshot.


Chatter poll

A user's response will always play a key role in making a good decision. Chatter poll is a quick and easier way to ask for feedback from a user on certain topics, such as the most needed topics to conduct sales training via a poll instead of e-mailing everybody and then summarizing it. You can create a poll in your feed as follows:



The screenshot shows a Chatter poll creation form. At the top, there are icons for 'Post', 'File', 'Thanks', and 'Poll'. Below these is a text input field containing the question: 'Have your registered for Salesforce1 world tour London?'. Underneath the question are three choice input fields: 'Choice 1' with 'Yes', 'Choice 2' with 'No', and 'Choice 3' with 'Not Interested'. Below the choices is a link that says 'Add more choices'. At the bottom of the form, there is a dropdown menu set to 'To My Followers' and a green 'Share' button, which is highlighted with a red rectangular border.

If you want to create a poll, click on **Poll** and enter the poll question, choices, and click on the **Share** button, as shown in the preceding screenshot.

 You can have a maximum of 10 choices in a poll. You can also share a poll with your followers or groups that you are a member of or you own.

The Chatter publisher action

The publisher action allows you to create actions and add them to the Chatter publisher on the home page. Now, you can turn a simple action into a global action with the help of Salesforce Chatter. This means that you can create a record or log a call on the fly. To do this, first of all, you have to enable the Salesforce publisher action.

Enabling a publisher action

Only the system administrator or users with customized application permission can enable this feature for an organization. To do this, follow these steps:

1. Navigate to **Name | Setup | Customize | Chatter | Settings**.
2. Click on **Edit**.

3. Select the **Enable Publisher Actions** checkbox.
4. Click on **Save**.

A publisher action only works with objects for which feed tracking is enabled. Publisher actions/global actions are of two types:

- Object-specific actions (that is, create a record)
- Global actions

Creating object-specific actions

Object-specific actions let users create records that are automatically associated with a related record. Here, we will create an **Event Registration** action on the **Event** object. To do this, follow these steps:

1. Navigate to **Name | Setup | App Setup | Customize | Event | Buttons, Links, and Actions**.
2. Click on the **New Action** button.
3. Select **Action Type** (create a record or custom action).
4. For **Create a record**, select the type of object to create if there is more than one record type for that object; then, select the record type for this action. In our case, we'll select **Event Registration**.
5. Type in a label for the action. Users will see this text for the action in the **Publisher** menu.
6. Enter the name; this name will be used in an API call or managed packages.
7. Type in a description for the action.
8. Optionally, you can change the icon.

The screenshot shows the 'Enter Action Information' dialog box. The fields are filled as follows:

- Object Name: Event
- Action Type: Create a Record
- Target Object: Event Registration
- Label: Event Registration
- Standard Label Type: --None--
- Name: Event_Registration
- Description: New Event Registration creation
- Icon: Change Icon

The 'Save' button at the bottom right is highlighted with a red box.

9. Click on **Save**.

Now you can create an event registration record from the event record details' page.



If you delete an action, it is automatically removed from all the layouts it's assigned to.

Creating global actions

A user can perform this action in any object, but there's no automatic relationship between the record that's created and any other record. You can add a global action to any object. To create a global action, follow these steps:

1. Navigate to **Name | Setup | App Setup | Customize | Create | Global Actions**.
2. Click on the **New Action** button.
3. Select **Action Type** (create a record or custom action).
4. For **Create a record**, select the type of object to create if there is more than one record type for that object; then, select the record type for this action.
5. For the **Custom** action, select the **Visualforce** page and specify the height of the action window.
6. Type in a label for the action. Users will see this text for the action in the **Publisher** menu.
7. Enter the name. This name will be used in an API call or managed packages.
8. Type in a description for the action.
9. Optionally, you can change the icon.
10. Click on **Save**.

Adding a global action to the page layout

To add an action to the page layout, follow these steps:


1. Navigate to **Name | Setup | App Setup | Customize | Object | Page Layouts**.
2. Select **Action** from the left-hand side of the screen.

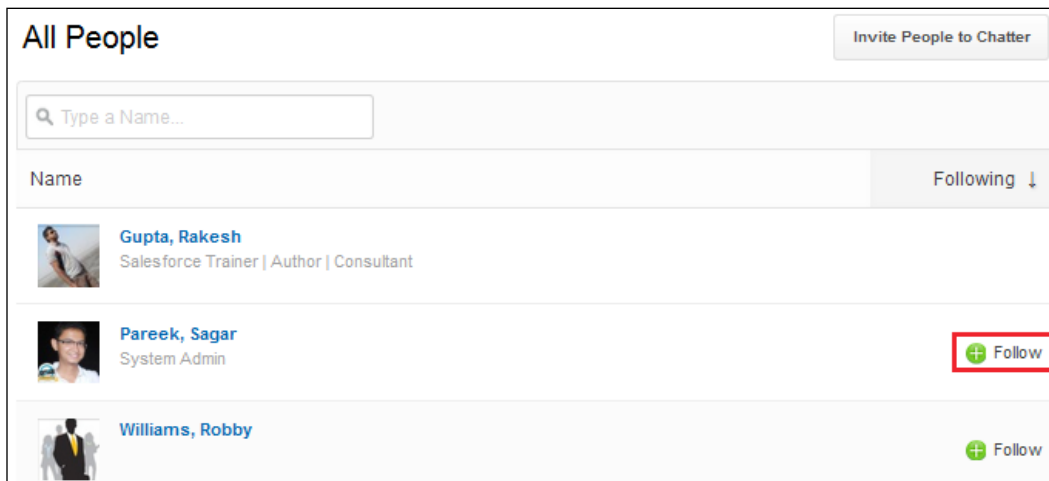
3. Drag-and-drop the action to the page layout.
4. Click on **Save**.

Follow/unfollow users and records

Chatter allows you to follow users and records. So any update that happens with records or the people that you are following will directly appear on your Chatter feed.


Follow/unfollow users

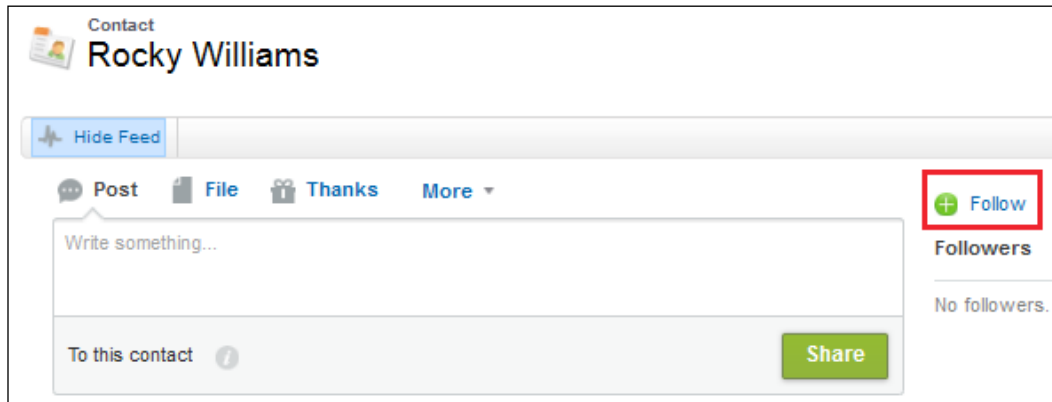
To follow users in your organization, navigate to the **People** tab and you will find a list of the users from your organization. To follow a user, click on the [ Follow] icon, as shown in the following screenshot:







Once you follow a user, you can see the [ Following ] icon. If you see this icon on the profile page of any user, it means you are following that user. To unfollow a user, click on the [] icon.

Follow/unfollow records

Once field tracking is enabled for a particular object, you can follow records of that object. To follow the records, go to any object's record for which your system administrator has already enabled feed tracking. Once you are on the details page of the record, you can easily identify the [ Follow] icon at the top-right corner of the page. Click on the **Follow** icon to follow the record:



Once you follow a record, you will see the [ Following ] icon. If you see this icon on the details page of any record, it means you are following those records. To unfollow a record, click on the [] icon.


[ You can follow a maximum of 500 people, topics, and records. To raise these limits, raise a case with Salesforce.com support.]

Managing files

A user can use the **Files** tab to upload, search, follow, share, and view files on cloud. Any file that you own or that has been shared with you is available to share on Chatter feeds. You can upload a file (maximum size of 2 GB) from your workstation. When you follow any file, upload a file, someone shares a file with you, or you or someone else uploads a file with CRM content library, it will automatically be added to the files list. You can share a file with users and groups with viewer and collaborator permission:

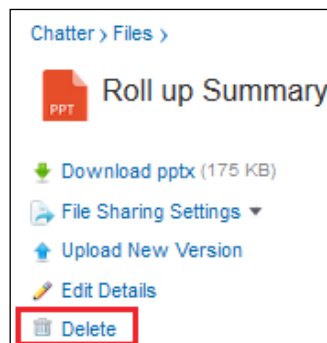
- **Viewer:** A viewer can view, download, and share a file
- **Collaborator:** A collaborator can view, download, share, edit, change permissions, and upload a newer version of the file

Uploading a file




To upload a file, navigate to the **Files** tab and click on the  icon. Select a file from your workstation and click on the **Open** button.

Deleting a file

To delete a file, navigate to the **Files** tab, search for the file that you want to delete, and go to the details page by clicking on the name of file. On the details page, click on the **Delete** link, as shown in the following screenshot:



Following a file

When you follow a file, you can see updates in your Chatter feed and Chatter page, including when a new version of the file is uploaded. To follow a file, navigate to the **Files** tab and enter the filename in the search box. Once you get the appropriate file, click on the filename to move to the detail page and then click on the  icon. Once you start following any file, you will notice the  icon on the detail page. To unfollow a file, click on the  icon.

Summary

In this chapter, we went through various aspects of Salesforce Chatter. At the beginning of the chapter, we provided you with an overview of Chatter and ways to enable it for your organization. Then, we went ahead and discussed topics for Chatter and branding Chatter e-mail notification. We also went through Chatter group concepts and ways to post a dashboard snapshot to Chatter. Finally, we looked at various Chatter features such as posting a status, creating a poll, and following and unfollowing records or users with file management concepts.

In the next chapter, we will discuss mobile administration, how to install Salesforce1 and SalesforceA, and their respective configurations.

10

Mobile Administration

In the previous chapter, we discussed the various features of Salesforce Chatter and how to enable Salesforce Chatter for your organization and Chatter group management. We also discussed ways to brand a Chatter e-mail notification with Chatter announcement. In this chapter, we will discuss the various Salesforce mobile applications and ways to configure these apps for your internal users. The following topics will be covered in this chapter:

- Overview of SalesforceA
- Overview of Salesforce#
- Overview of Salesforce1

Overview of SalesforceA

SalesforceA is a mobile-based application for administrators. It allows Salesforce administrators to do their work on the fly, while working away from the office or remotely. This application allows the Salesforce administrator to reset user password, freeze user accounts, deactivate user accounts, and so on.

Features of the SalesforceA mobile application

The SalesforceA mobile application comes with various features. The following is a list of actions that the Salesforce administrator can perform through the SalesforceA mobile app:

- Freeze a user's account
- Unlock or deactivate a user's account
- Edit a user's details
- Reset password
- Assign and unassign permission sets

Installing the SalesforceA mobile application

You can download the SalesforceA mobile application from iTunes and Google Play. It is supported by the following devices:

- Android phone or tablet with OS v4.2 or higher
- Apple iPhone and iPod Touch with iOS v5.0 or higher

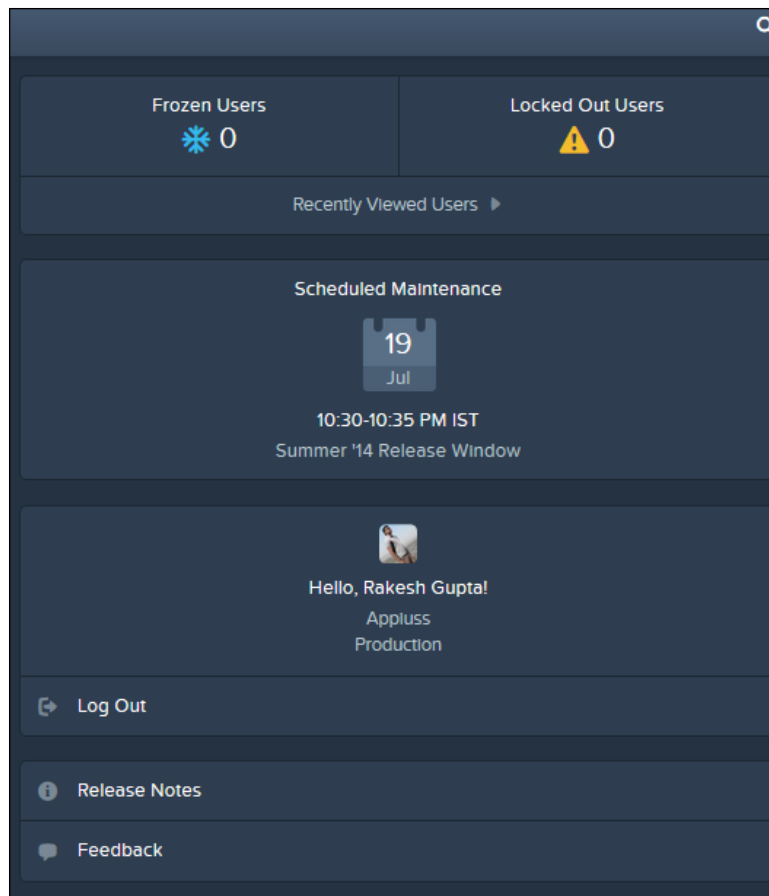
It can be downloaded for different platforms from the following links:

- iTunes: <https://itunes.apple.com/in/app/salesforcea/id731117958?mt=8>
- Play Store: <https://play.google.com/store/apps/details?id=com.salesforce.admin1&hl=en>

Logging in to the SalesforceA mobile application

The following are the steps to use to log in to the SalesforceA mobile application:

1. Click on the SalesforceA mobile app icon on your mobile/iPad.
2. Enter your login credentials and activation code.
3. Then, allow the SalesforceA application to access your Salesforce basic information.
4. The first time you log in, it will ask you to set the passcode; from the next time onwards, you will have to enter this passcode to access the SalesforceA application.
5. This will redirect you to the application's home page. It will look like the following screenshot:



6. Now start administrating your Salesforce organization from anywhere.
7. Use the search bar to find users from your organization, and then go to the user detail page and perform an action as per your needs.



You can also use the Salesforce1 app on your browser. Just append `one/admin.app` to your Salesforce URL (`https://instance name.Salesforce.com/one/admin.app`).

Overview of Salesforce#

Salesforce# allows you to generate time-based tokens. It provides additional security for the Salesforce administrator to log in with the two-factor authentication. In *Chapter 3, Make Your Salesforce Data Secure – Security Settings in Salesforce*, we discussed two-factor authentication in Salesforce. There, we used Google apps to generate a time-based token, but now you can also use the Salesforce# application to generate a time-based token.

Installing the Salesforce# mobile application

You can download the Salesforce# mobile application from iTunes and Google Play. It is supported by the following devices:

- Android phone or tablet with OS v4.0 or higher
- Apple iPhone and iPod Touch with iOS v7.0 or higher

It can be downloaded for different platforms from the following links:

- iTunes: <https://itunes.apple.com/us/app/salesforce/id782057975?ls=1&mt=8>
- Play Store: <https://play.google.com/store/apps/details?id=com.salesforce.authenticator>

Overview of Salesforce1

Salesforce1 is a mobile-based application used to create, update, and delete records from anywhere. You can also view reports and dashboards using it. This is the updated version of the legacy application Salesforce Chatter. Users can also use Salesforce Chatter through this application.

Features of the Salesforce1 mobile application

The Salesforce1 mobile application comes with various features. The following are a few actions that a user can perform through the Salesforce1 mobile app:

- Create, update, and delete records
- Access publisher actions
- Submit records for approval
- Access the custom list view
- Access Salesforce Chatter

- Access all your custom objects and apps through the navigation menu
- Users can also access Visualforce pages and components in the navigation menu and in records
- Access Salesforce files from the Salesforce1 app
- Access events from the navigation menu

Installing the Salesforce1 mobile application

You can download the Salesforce1 mobile application from iTunes and Google Play. It is supported by the following devices:

- Android phone or tablet with OS v4.2 or higher
- Apple iPhone and iPod Touch with iOS v6.0 or higher

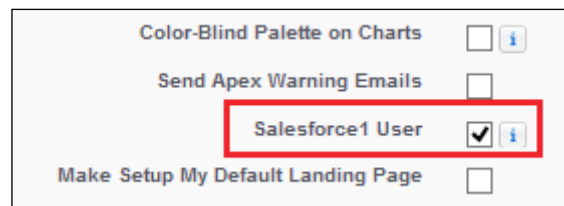
It can be downloaded for different platforms from the following links:

- iTunes: <https://itunes.apple.com/in/app/salesforce1/id404249815?mt=8>
- Play Store: <https://play.google.com/store/apps/details?id=com.salesforce.chatter&hl=en>

Configuring the Salesforce1 mobile application

Perform the following steps to grant access to the SalesforceA mobile application:

1. Navigate to **Setup | Administer | Manage Users | Users**.
2. Edit user records and select the **Salesforce1 User** checkbox, as shown in the following screenshot:

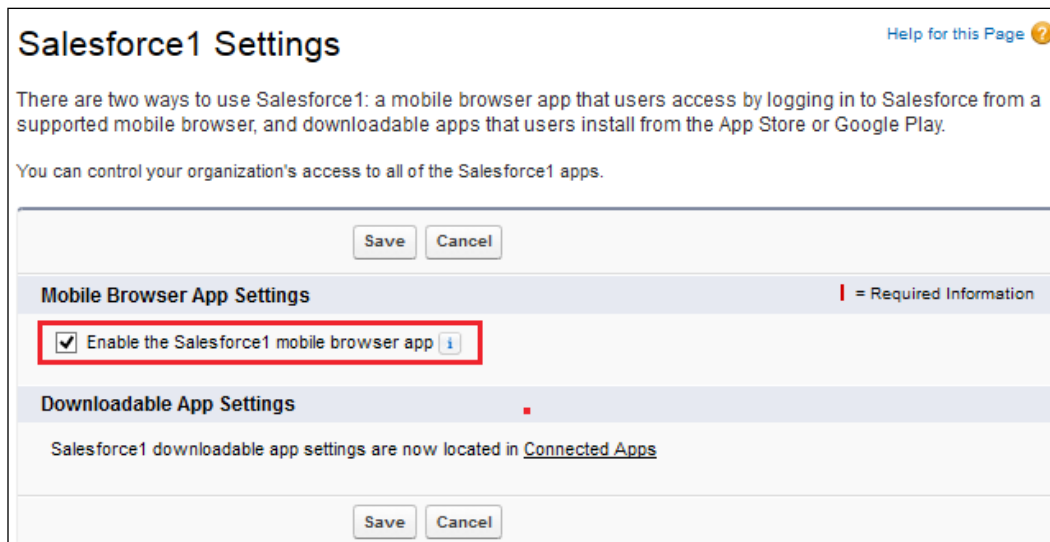


3. Click on **Save**.

Mobile Browser App Settings

Mobile Browser App Settings allows users to access the Salesforce1 application through a supported mobile browser. To do this, follow these steps:

1. Navigate to **Setup | Administer | Mobile Administration | Salesforce1 | Settings**.
2. Go to the **Mobile Browser App Settings** section and select the **Enable the Salesforce1 mobile browser app** checkbox, as shown in the following screenshot:



The screenshot shows the 'Salesforce1 Settings' page. At the top right, there is a 'Help for this Page' link with a question mark icon. Below the title, there is a paragraph explaining that there are two ways to use Salesforce1: a mobile browser app or downloadable apps. A sub-heading reads 'You can control your organization's access to all of the Salesforce1 apps.' Below this, there are 'Save' and 'Cancel' buttons. The 'Mobile Browser App Settings' section is highlighted, and the checkbox 'Enable the Salesforce1 mobile browser app' is checked and highlighted with a red box. To the right of this checkbox is an information icon. Below this section is the 'Downloadable App Settings' section, which has a red dot indicating required information. A note states 'Salesforce1 downloadable app settings are now located in [Connected Apps](#)'. At the bottom, there are 'Save' and 'Cancel' buttons.

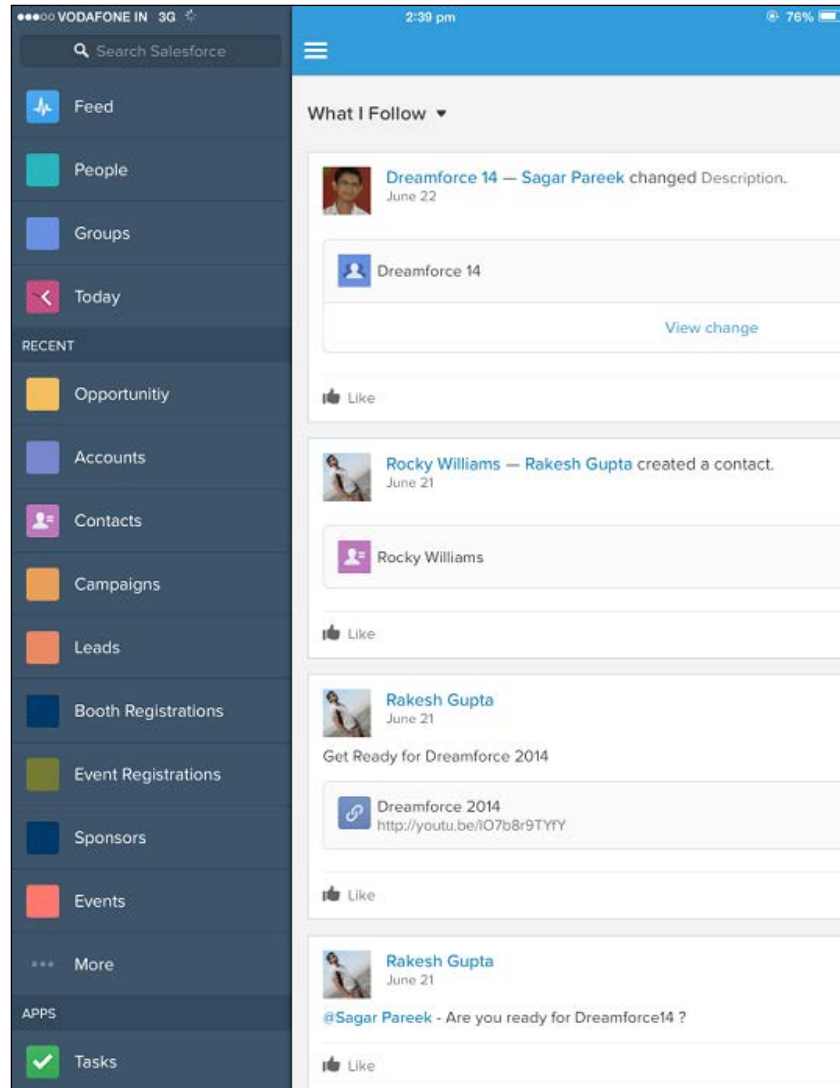
3. Click on **Save**.
4. Now, a user can access Salesforce1 through a supported mobile browser by appending `one/one.app` to the URL (`https://instance name.Salesforce.com/one/one.app`).

Logging in to the Salesforce1 mobile application

The following are the steps to use to log in to the Salesforce1 mobile application:

1. Click on the Salesforce1 mobile app icon on your mobile/iPad.
2. Enter your login credentials and activation code.
3. Then, allow the Salesforce1 application to access your basic Salesforce information.

- It will redirect you to the application home page. It will look like the following screenshot:



- Now start creating, updating, and deleting records or collaborating with your user.

Branding the Salesforce1 application

Now you can brand the Salesforce1 mobile application that matches your company's branding. You can change the Salesforce1 app's loading page, background color, loading page logo, header background color, and image used for the publisher icon. To do this, follow these steps:

1. Navigate to **Setup | Administer | Mobile Administration | Salesforce1 | Branding**.
2. Go to the **Salesforce1 Branding Settings** section.
3. To customize **Brand Color** for key user interface elements, including the header, click on **Select a color**.
4. To customize **Background Color** of the loading page, click on **Select a color**.
5. To customize **Loading Page Logo**, select an image of type .jpg, .gif, or .png files up to 200 KB in size. The maximum image size is 460 pixels by 560 pixels.
6. To customize the Salesforce1 **Publisher icon** image, select an image of type .jpg, .gif, or .png files up to 50 KB in size. The maximum image size is 88 pixels by 88 pixels. It will look like the following screenshot:

Salesforce1 Branding [Help for this Page](#)

Customize the appearance of the Salesforce1 app so it matches your company's branding. Salesforce1 custom branding is now supported in version 5.2 or later of the downloadable apps, as well as the mobile browser app.

Salesforce1 Branding Settings

Brand Color Set the background color for key user interface elements, including the header.

#EB4600

Loading Page Color Set the background color of the loading page.

#96DC24

Loading Page Logo Upload an image to use as the logo on the loading page.

File Types: PNG, GIF, or JPG
Maximum Size: 200 KB; 460x560 pixels

Appiuss logo.png
Appiuss logo.png

Publisher Icon Upload an image to use as the Publisher icon.

File Types: PNG, GIF, or JPG
Maximum Size: 50 KB; 88x88 pixels

No file selected.

7. Click on **Save**.

Summary

In this chapter, we went through various Salesforce applications for mobiles, such as Salesforce1, SalesforceA, and Salesforce#. We also went through ways to configure these apps with download links. We discussed ways to brand the Salesforce1 app according to your company branding. In the next chapter, we will discuss the various ways to deploy changes in the live system.

11

Setting Up Deployment Processes

In the previous chapter, we discussed mobile administration in Salesforce, Salesforce1, Salesforce Classic, Salesforce Touch, and Salesforce A. In this chapter, we will discuss the various ways to deploy elements and changes in a live Salesforce instance. We will go through the following topics:

- Change Sets
- Force.com IDE
- Overview of packages

Understanding Change Sets and their types

Change Sets are containers that are used to send customizations or elements from one organization to another in Salesforce. These containers can only hold metadata, which means you can only send those changes or customizations that you made through the setup menu. You cannot send records from one organization to another using Change Sets. Both the organizations must have a deployment connection between them, for example, production and Sandbox created for the same organization.

Change Sets are of the following two types:

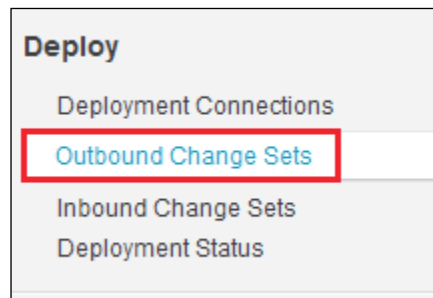
- Outbound Change Sets
- Inbound Change Sets

Outbound Change Sets

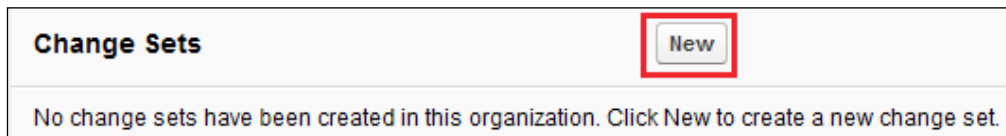
Outbound Change Sets are those Change Sets that are used to send customizations from one organization to another. For example, we have added a new custom field on an account object in Sandbox named Unique Code, and now we want to send it to the production organization. In this case, we can use the Outbound Change Sets to send this customization from Sandbox to production.

To create an Outbound Change Set, follow these steps:

1. Log in to your Sandbox by visiting <https://test.salesforce.com>.
2. Navigate to **Setup | Deploy | Outbound Change Sets**.



3. Click on **Continue**.
4. On the next screen, click on **New** to make a new Change Set.



5. On the next screen, name this Change Set `Account Unique Code Field Addition` and give a relevant description to this Change Set, as shown in the following screenshot:

Change Set Edit
New Change Set

Change Set Edit Save Cancel

Name Account Unique Code F

Description Addition of the unique code field on the account object

Save Cancel

6. Click on **Save**.
7. On the next screen, select the component type you want to add to this Change Set. In our case, we need to add the account field **Unique Code**, so we need to select **Custom Field**.
8. Now on the same screen from the available fields, select the checkbox in front of the custom field **Unique Code**.

Component Type: Custom Field

<input checked="" type="checkbox"/>	Name
<input checked="" type="checkbox"/>	Unique Code

Add To Change Set Cancel

9. Click on **Add to Change Set**.

10. On the next screen, click on the **Upload** button.

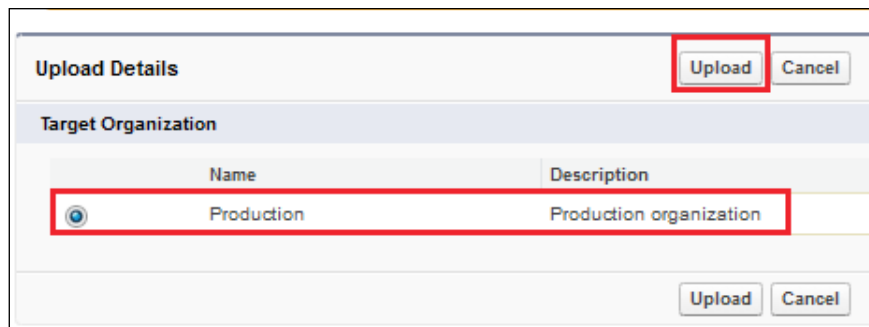


The screenshot shows a 'Change Set Detail' window. At the top right, there are four buttons: 'Edit', 'Delete', 'Upload', and 'Clone'. The 'Upload' button is highlighted with a red rectangular box. Below the buttons, the following details are displayed:

Change Set Name	Account Unique Code Field
Description	Addition of the unique code field on the account object
Created By	Sagar Pareek, 6/23/2014 3:31 PM

At the bottom right of the window, there are another set of four buttons: 'Edit', 'Delete', 'Upload', and 'Clone'.

11. Select the target organization under the **Upload Details** section where you want to upload this Change Set; in our case, select **Production**.



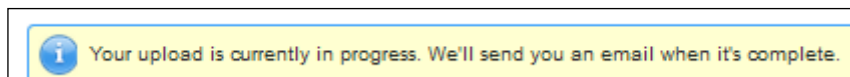
The screenshot shows an 'Upload Details' window. At the top right, there are two buttons: 'Upload' and 'Cancel'. The 'Upload' button is highlighted with a red rectangular box. Below the buttons, there is a section titled 'Target Organization' containing a table:

Name	Description
<input checked="" type="radio"/> Production	Production organization

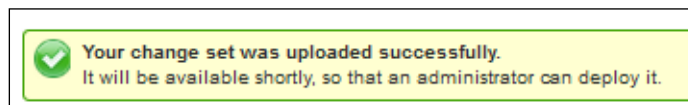
The row for 'Production' is highlighted with a red rectangular box. At the bottom right of the window, there are two buttons: 'Upload' and 'Cancel'.

12. Click on **Upload**.

13. Once you click on **Upload**, you will see the following message on the screen:



14. Once the upload process is complete, you will see the following message:

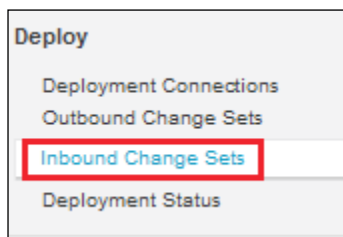


Inbound Change Sets

Inbound Change Sets are the Change Sets that are used to receive customizations from one organization into another. For example, we have added a new custom field on the account object in Sandbox named **Unique Code**, and now we want to receive it from the production organization. In this case, we can use Inbound Change Sets to receive this customization from Sandbox into production.

To receive an Inbound Change Set, follow these steps:

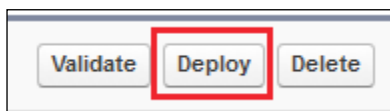
1. Log in to your production organization by visiting <https://login.salesforce.com/>.
2. Navigate to **Setup | Deploy | Inbound Change Sets**.



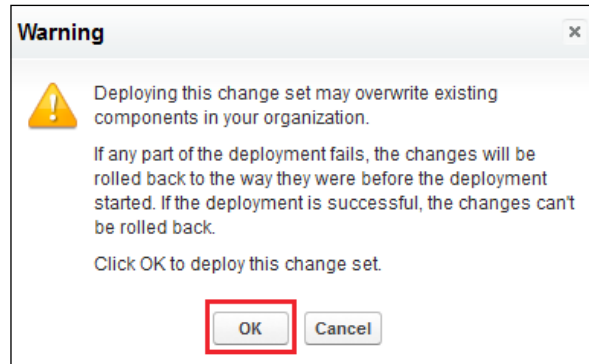
3. On the next screen, click on **Continue**.
4. On the next screen under the **Change Sets Awaiting Deployment** section, you will find the Inbound Change Set that came from the Sandbox organization.
5. Click on the name of the Change Set, in our case, **Account Unique Code Field**.



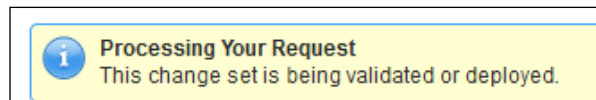
6. Once on the next screen, click on **Deploy**.



7. Click on **OK** in the pop-up message, which tells you that the changes once deployed are not reversible.



8. You will see the following message while the upload is in progress:



9. Once the upload is complete, you will see the success or failure on the next screen under **Deployment History**.

Deployment History							
Action	Start Time	End Time	Validate Only	Status	Components	Apex Tests	Deployed By
View Results	6/23/2014 3:48 PM	6/23/2014 3:49 PM	<input type="checkbox"/>	Succeeded	1		Sagar Pareek

Change Set Components				
Action	Name	Parent Object	Type	API Name
View Source	Unique Code	Account	Custom Field	Account.Unique_Code__c

10. If the status of the Change Set is **Success**, it means the Change Set has been successfully deployed.

The Force.com IDE

The Force.com IDE is a development tool provided by Salesforce.com, which is used to write Apex Classes, Apex Triggers, and Visualforce pages. You can download and edit the metadata components and explore the schema of your Force.com project.

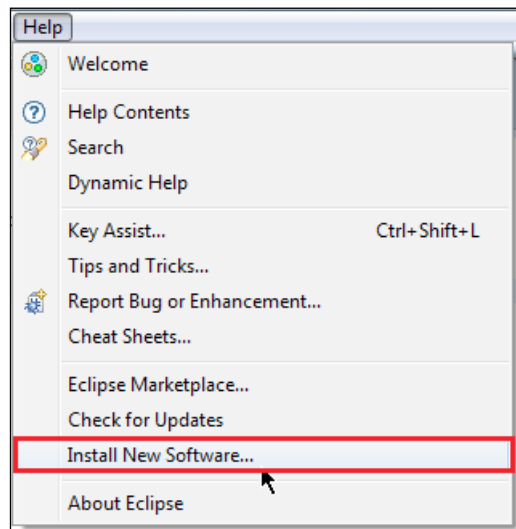
Installing the Force.com IDE

Before installing the Force.com IDE, you need the following aspects to be available and installed on your machine:

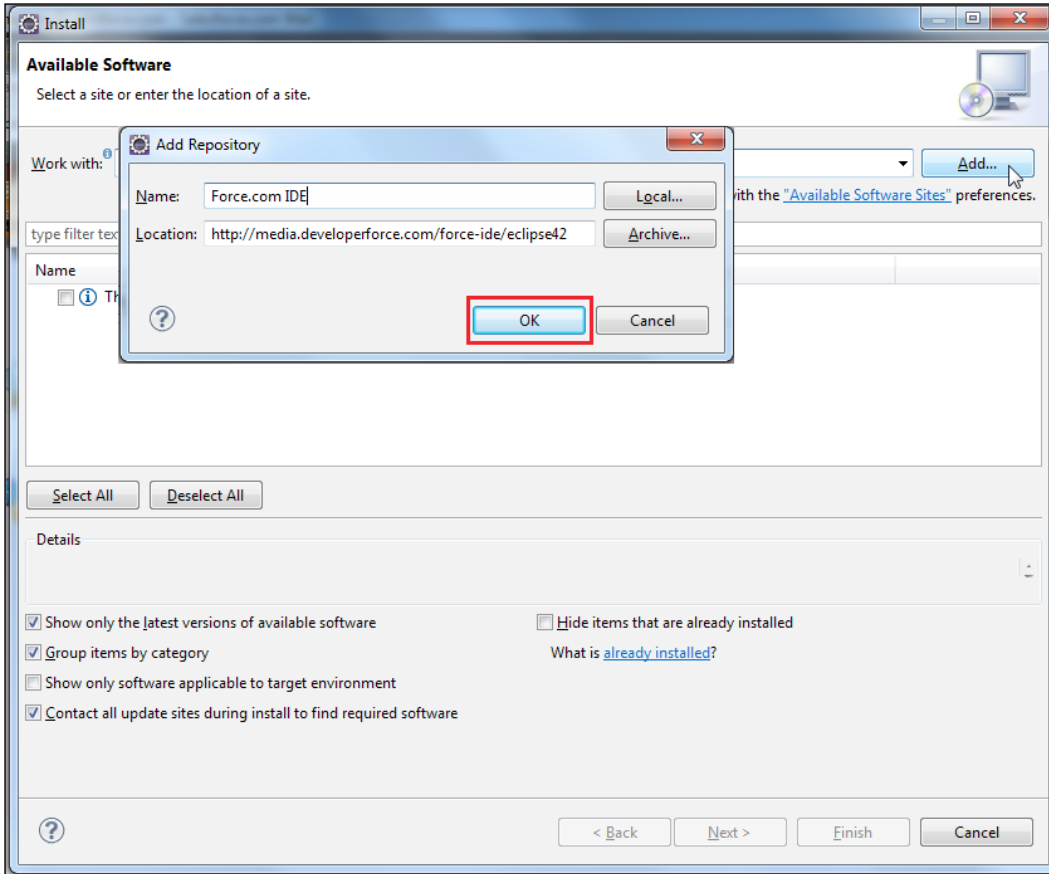
- Java SE Runtime Environment (v1.6 or higher)
- Eclipse IDE for Java Developers (Juno 4.2 or Kepler 4.3)

To install the Force.com IDE, follow these steps:

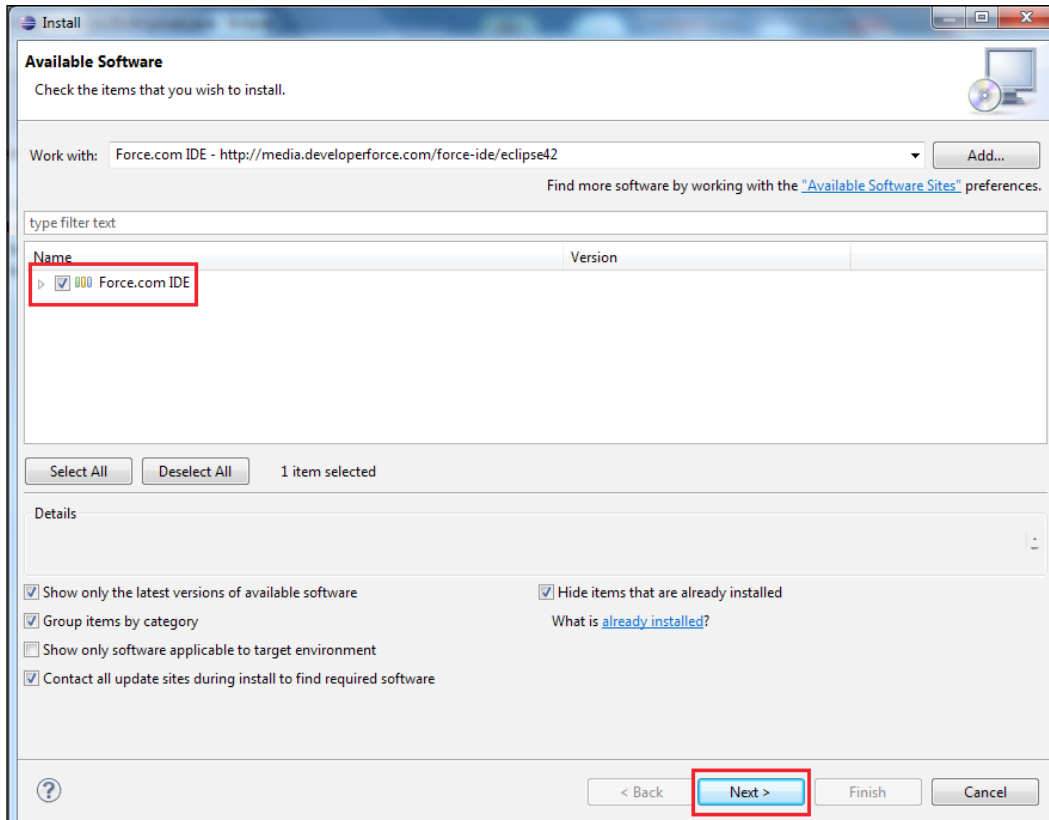
1. Open Eclipse for Java Developers.
2. Click on the **Install New Software** option in the **Help** tab, as shown in the following screenshot:




3. On the next window, click on the **New** button. In the dialog box, enter Force.com IDE Name in the **Name** field, specify **Location** as `http://media.developerforce.com/force-ide/eclipse42`, and click on **OK**.



4. Select the checkbox in front of **Force.com IDE**.



5. Click on **Next**.
6. On the **Install Details** dialog box, click on **Next**.
7. In the **Review Licenses** dialog, accept the terms and click on **Finish**.
8. Once the installation is complete, you will be asked to restart Eclipse. Click on **Yes**.
9. When Eclipse restarts, navigate to **Window | Open Perspective | Other**.
10. Select **Force.com** and click on **OK**.


 Additional information on how to use the Force.com IDE is available at https://developer.salesforce.com/page/An_Introduction_to_Force_IDE.

Overview of packages

Packages are containers that can contain elements such as a single component or a group of apps. Packages are used for distribution purposes among organizations.

Packages are of the following two types:

- Unmanaged packages
- Managed packages

These differences are explored in the following table:

Unmanaged packages	Managed packages
The source code is open to developers/users.	The source code is a closed source.
Components can be edited in the organization after installation.	Components cannot be edited in the organization after installation.
The base organizations have no controller over the package once distributed since the code can be altered in the target organization.	The code can only be altered in the base organization where the package components were created or developed.
These are generally used for module distribution among developers.	These are generally used by Salesforce.com partners to distribute packages as apps to their clients primarily through the marketplace AppExchange.

Summary

In this chapter, we learned about setting the deployment process through various means, such as Change Sets, Force.com IDE, and Packages. In the next chapter, we will discuss installing and uninstalling an app bought from AppExchange, and how AppExchange can enhance the usability of your Salesforce organization.

12

AppExchange – Extending Salesforce Functionality

In the previous chapter, we discussed various ways to deploy a Salesforce.com project. We discussed how to use Change Sets, Force.com IDE, and packages. In this chapter, we will discuss Salesforce's own marketplace for apps known as AppExchange. We will also discuss installing and uninstalling an app bought from AppExchange, and how AppExchange can enhance the usability of your Salesforce organization. The following topics will be covered in this chapter:

- An overview of AppExchange
- Installing an application from AppExchange
- A few noteworthy applications
- Uninstalling an application from Salesforce

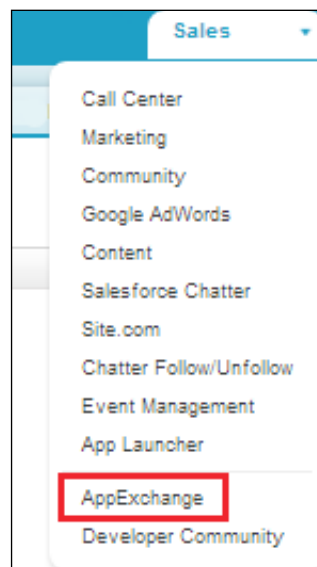
AppExchange – an overview

AppExchange is a marketplace owned by Salesforce.com, where web apps built on the Force.com platform are hosted to be sold. AppExchange is regarded as one of the biggest marketplaces for cloud computing apps. Users can purchase apps from this marketplace and they are directly installed in the user's organization. AppExchange was launched in 2005 by Salesforce.com and has more than 2,300 apps on it. Salesforce.com offers both paid and free apps by the AppExchange marketplace, which are categorized into various categories for both small and big businesses.

Installing applications from AppExchange

To begin understanding how to install an app from AppExchange, let's consider an example. Suppose the sales team of your organization has plenty of vCards (it may be on their mobile devices) and they want to import them into Salesforce somehow. A possible solution is that they can manually enter the details of each contact into Salesforce as contact records. They may also need functionalities to import and export accounts, leads, and contacts as vCards so that they can share the information with others in the team or sync with their mobile devices. Salesforce doesn't have any box feature for this so you need to have a custom development or download some apps from AppExchange and install them. It will be better if you get a free app. To install an app from AppExchange, follow these steps:

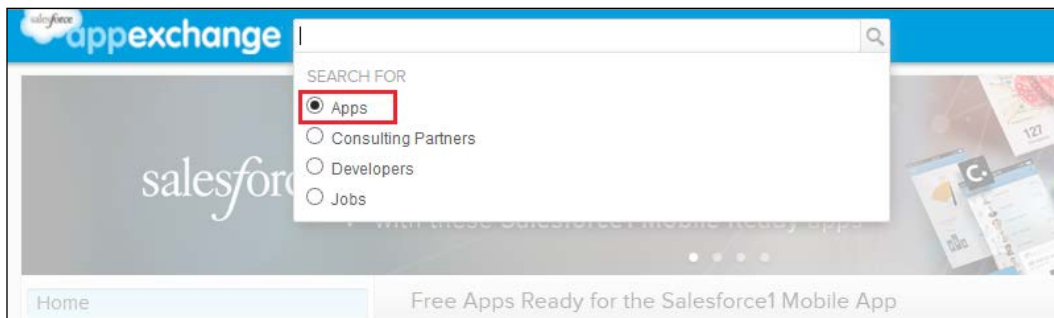
1. Log in to your Salesforce account using your credentials.
2. Click on the dropdown in the top-right corner and then click on the **AppExchange** link, as shown in the following screenshot:



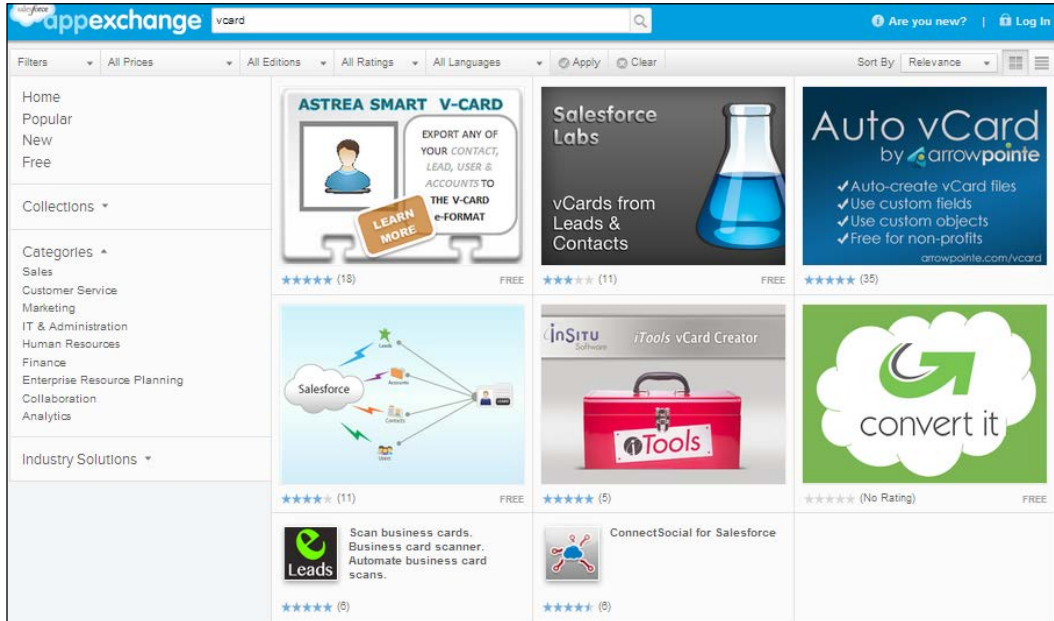
- When you click on **AppExchange**, a new window will open in the browser. It will look like this:



- In the search bar at the top, enter the keyword **vcard**. Make sure that the **Apps** radio button is selected.



This will show related apps, with the most popular apps first.



5. From the list of apps, we can see the **Astrea Smart vCard** app first. To install this app, click on **Astrea Smart vCard**. It will redirect you to the details page of the app.

ASTREA SMART V-CARD

EXPORT ANY OF YOUR CONTACT, LEAD, USERS & ACCOUNTS TO THE V-CARD e-FORMAT

EXPORTS AND IMPORTS, SINGLE OR MULTIPLE V-CARDS

Astrea Smart vCard
Export, Import Contact, Lead, Account, User one or multiple in vcf or pdf
★★★★ (18)

Overview Details Reviews 18 Provider Save Get It Now

App by Astrea It Services Pvt Ltd

- Export any of your Contact, Lead, User and Account to the vCard format.
- Import multiple contacts from a VCF file.
- Export vCard for all contacts of any account in VCF and PDF format too.
- Support VCF 3.0 & VCF 2.1 format.

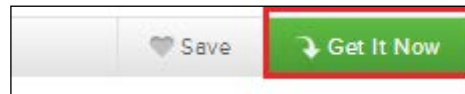
RELEASED
10/14/2011

PRICING
Free

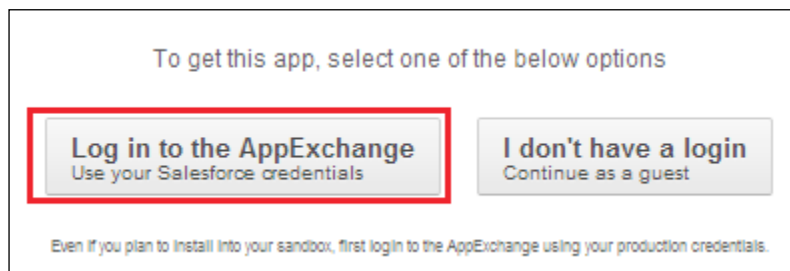
CATEGORIES
Productivity

Watch a Demo
Take a Test Drive

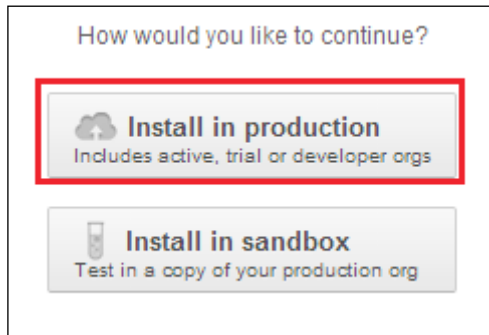
6. Click on the **Get It Now** button, as shown in the following screenshot:



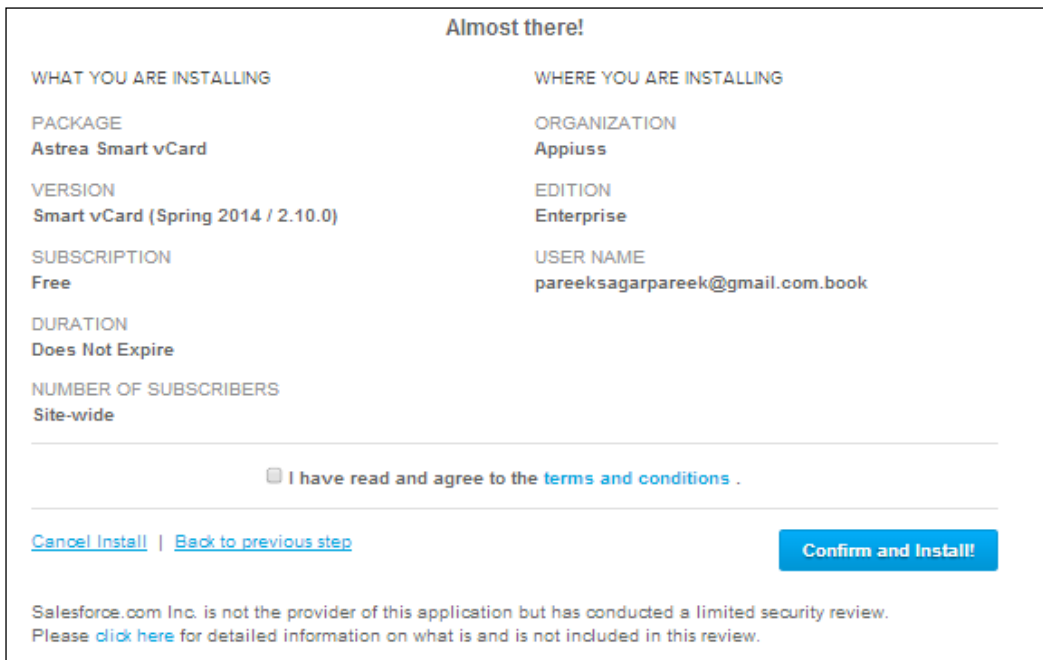
7. On the next screen, you will be asked to log in. Click on **Log in to the AppExchange**. If you don't have a Salesforce account, click on **I don't have a login** button, as shown in the following screenshot:



- On the next screen, you will be asked to select the type of organization that you want to install the app for. Here, we will select **Install in production** since we are using Developer Edition, but it's good practice to install the app first in your Sandbox by selecting the **Install in sandbox** button, as shown in the following screenshot:



- On the next screen, you will be asked to agree with the terms and conditions, and this screen will give you brief information about the app you are going to install. Select the checkbox **I have read and agree to the terms and conditions** and click on the **Confirm and Install!** button, as shown in the following screenshot:



10. Next, you will be asked to log in to the organization where you want to install this app. Enter your login credentials.



The screenshot shows the Salesforce login interface. At the top is the Salesforce logo. Below it, it says "8 saved user name(s)". There are two input fields: "User Name" and "Password". A blue button labeled "Log in to Salesforce" is positioned below the fields. Underneath the button is a checked checkbox labeled "Remember User Name". At the bottom, there are three links: "Forgot your password? | Sign up for free." and "Log in to a custom domain."

11. Then, you will get details about the app and its components that are going to be installed. Click on the **Continue** button, as shown in the following screenshot:

Package Installation Details

Package Name	Smart vCard
Version Name	Spring 2014
Version Number	2.10
Publisher	astrea it services
Description	

[Cancel](#)

Package Components

▼ Tabs (2)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Note		Tab	This is a brand new component.
Create	Import vCards		Tab	This is a brand new component.

12. Now, the installation wizard will start. On the first screen, you will be asked to approve the package API access. Click on **Next**.

Step 1. Approve Package API Access Step 1 of 3

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects
This Package will have the user's access (via the API) to all custom objects in your organization.

Extended Object Permissions

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓	Leads	✓	✓	✓	✓
Assets	✓	✓	✓	✓	Opportunities	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓	Price Books	✓	✓	✓	✓
Cases	✓	✓	✓	✓	Products	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	Push Topics	✓	✓	✓	✓
Contracts	✓	✓	✓	✓	Quotes	✓	✓	✓	✓
Documents	✓	✓	✓	✓	Solutions	✓	✓	✓	✓
Ideas	✓	✓	✓	✓					

General User Permissions
This Package will be able to use all of the general user permissions from the user's profile.

Administrative Permissions
This Package will be able to use all of the administrative privileges from the user's profile.

Next Cancel

13. On the next screen, you will be asked to choose the security level. Choose **Grant access to admins only** and then click on **Next**, as shown in the following screenshot:

Package Installer Help for this Page ?

Smart vCard

Step 2. Choose security level Step 2 of 3

Select security settings:

- Grant access to admins only** Users with your profile get full access (best for limited deployments)
- Grant access to all users All internal custom profiles get full access
- Select security settings User access set by profile (recommended for most packages)

Previous **Next** Cancel

14. Next, click on the **Install** button to start the installation process, as shown in the following screenshot:



15. Once the installation is successfully completed, you will see following screen. You will also get an e-mail notification from AppExchange.

Installed Package Detail

Package Name	Smart vCard	Version Number	2.12
Language	English	First Installed Version Number	2.12
Version Name	Spring 2014	Package Type	Managed
Namespace Prefix	SmartvCard	Allowed Licenses	Unlimited
Publisher	astrea it services	Used Licenses	0
Status	Active	API Access	Unrestricted [Enable Restrictions]
Expiration Date	Does not Expire	Modified By	Rakesh Gupta1 , 06-08-2014 0:57
Description	Export any of your contacts , leads,Users & Accounts to the vCard format with a single click of a button. & Support VCF 3.0 & VCF 2.1 Instantly search and download Leads, Contacts, Accounts and Users as vCard or PDF! Export single or multiple Contacts as vCard as PDF		
Installed By	Rakesh Gupta1 , 06-08-2014 0:57		

16. Now you can access the features of the app. In our case, we can see the **Import vCard** tab in our organization and the **Generate vCard** button on the accounts, contacts, and leads detail pages.

Importing contact from VCF file

Steps for importing a VCF file

1. Click on "Choose File" button to Browse VCF file. The format of the file should be VCF. The name of the VCF file will be displayed on the screen. There may be more than one VCF records in this file
2. After this click on "Import Contact" Button to import contacts

No file selected.

A few noteworthy applications



These are a few noteworthy apps based upon the number of downloads and popularity with users. They are as follows:

- **Form Assembly for AppExchange:** This helps you create powerful web forms to collect and send data to any Salesforce custom and standard objects. Capture new leads, update contacts, attach files, or open cases with our easy Form Builder.
- **Drag, Drop, and Upload:** This lets you drag, drop, and upload files and also lets you do so for multiple files at once for a big time saver.
- **Former Positions:** This cleans up your cluttered contacts by automatically tracking changes to a contact's account and title.
- **Layout Page:** This converts any Salesforce page layout (standard or custom) into a Standard Visualforce page in just three simple and easy steps.
- **GoToMeeting Integration:** This saves time by letting users start and schedule their GoToMeetings from inside Salesforce.
- **Dupe Catcher:** This enables Salesforce users to identify, block, and dupe leads, accounts, and contacts in real time at the point of entry.
- **Jitterbit Cloud Data Loader for Salesforce:** This is a free data migration that enables Salesforce users to automate the import/export of data between flat files, databases, and Salesforce or Force.com.
- **Astrea Smart vCard:** This lets you import and export record forms of VCF files (vCards).

Uninstalling applications from Salesforce

In case you want to uninstall the app that you installed from AppExchange, follow these steps:

1. Navigate to **Setup | Build | Installed Packages**.
2. On the next screen, you will see the application packages installed in your organization.

Installed Packages									
Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date
Uninstall	 Salesforce1 and Chatter Apps	Salesforce.com	1.6	sf_chtr_apps	Free	N/A	N/A	N/A	2/9/2014 3:06 PM
	Description This package contains Connected Applications for all the officially supported Salesforce1 and Chatter applications on your desktop and mobile devices!								
Uninstall	 SmartvCard	astrea it services	2.10	SmartvCard	Active	Unlimited	0	Does not Expire	6/21/2014 11:02 PM
	Description Export any of your contacts , leads,Users & Accounts to the vCard format with a single click of a button. & Support VCF 3.0 & VCF 2.1 Instantly searc...								

3. Click on the **Uninstall** button in front of the application name, as shown in the preceding screenshot.
4. On the next screen, you will get information about the components that are going to be uninstalled.
5. Select the **Do not save a copy of this package's data after uninstall** radio button.
6. Then, select **Yes, I want to uninstall this package and permanently delete all associated components** and click on the **Uninstall** button, as shown in the following screenshot:

Save a copy of this package's data for 48 hours after uninstall

Do not save a copy of this package's data after uninstall

Yes, I want to uninstall this package and permanently delete all associated components

Uninstall

7. On successfully uninstalling your app, you'll be redirected back to the **Install Packages** screen. The **Uninstalled Packages** section will show the uninstalled packages history.

Uninstalled Packages					
Action	Package Name	Namespace	Expiration Date	Uninstall Status	Uninstall Date
Data Del	Smart vCard (Version Name Spring 2014)	SmartvCard	6/23/2014 11:27 PM	Uninstall Complete	6/21/2014 11:27 PM

Summary

In this chapter, we went through the concepts behind Salesforce AppExchange. At the start of the chapter, we discussed the AppExchange overview. Then, we moved on and discussed how to install an app from AppExchange in detail. We also explained the ways to uninstall an app from your organization. Next, we discussed a few key apps from AppExchange.

In this book, we have gone through various Salesforce.com concepts such as Sales Cloud and Service Cloud automating your business process using the workflow and approval process, and improving your organization data quality using validation rules. We also discussed how to use the data loader.

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A

Access to Send Email setting

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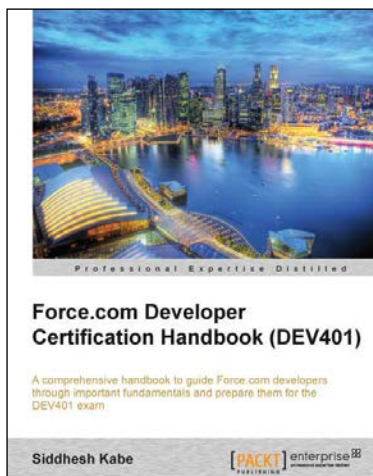


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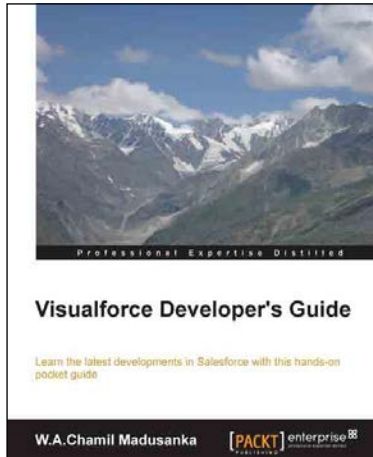
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