Assigning Permission Sets:-

From the user detail page we can assign permission sets or remove a permission set assignment.

Go to the following path for assigning Permission sets to user.

Click Your Name
↳ Setup
↳ Manage Users
↳ Users
↓

1. Select the user which we want to assign Permission set.

2. In the Permission set Assignments related list, click "Edit Assignments."

3. To assign a permission set, select it from the Available Permission sets box and click "add."

To remove a permission set assignment, select it from the Enables permission sets box and click "Remove". button

PREFACE

This book has been developed especially from the idea of glance look learning. This book helps for individuals who want to learn things with in short time. From this idea I started writing this book which will be helpful to the professionals to learn quickly without missing the things. While writing this book I faced many difficulties in which reduction of 3000 pages to 200 pages is the main. After all my hard work from the 3 months I was able to bring this book in front of you to use it responsibly. Bringing easier way of learning to the students is the idea behind making complex things to simpler. I would like to thank all the people who inspired and helped me in writing this book.

"Experience the joy of learning"

Capital Info Solutions

F.No : 106, KVR Enclave,

Beside Satyam Theatre,
Ameerpet, Hyderabad.

Ph:+91 86 86 86 42 86

INTRODUCTION

Cloud Computing:-

Cloud Computing is a crowd/group of unknown resources that are giving for a specific purpose to the user.

* It is a Concept of pay per use of each IT service.

* Cloud computing is a Concept of accessing Infrastructure, platform and software as a service over the internet by paying the each use of the IT services.

There are three services in cloud Computing. They are also called cloud services.

1. IAAS (Infrastructure As A Service):-

Accessing infrastructure such as Application server, Storage server over the internet is called IAAS.

2. PAAS (platform As A Service):-

It is the concept of accessing a platform such as any programming language on which an application is built provided as a service over the internet is called PAAS.

Ex: Force.com → The platform used by the Salesforce
Google AppEngine

3. SAAS (Software As a Service):-

It is the Concept of accessing a software application over the internet is called SAAS.

Ex: Salesforce CRM

MS CRM

Advantages:-

* It reduces the cost.

* Increased storage

* Simple User Interface that is well received by users.

* Flexibility

↳ No need to install any software and No need to buy any licences.

→ We can access from any location.

* Every Small Industries can also use Salesforce CRM because of low cost.

* Low Maintaince and Low Risk.

* Salesforce will have Multi-tentant Architecture.

* Salesforce adds extra features for every release. They are three types of Releases.

1. Summer Release

2. Winter Release

3. Spring Release.

Different Products of Salesforce:-

Salesforce.com offers everything we need to transform our business into a Social Enterprise, so we can connect to customers and employees like never before. With no software or harware to install, we are up and running and seeing a positive impact on business quickly with salesforce.com.

* Force.com → Force.com is the cloud platform to automate and extend the business by developing the applications.

* Radian6 → It is the social media monitoring and engagement platform. This will be responsible for listen, Analyze and enage in conversations with customers on Public Social web.

* Site.com → Design and Publish websites, social pages, templates with the first web in the cloud. It's built for social, so we can easily add Twitter streams, facebook likes and more...

* Heroku → Heroku is a cloud application platform- a new way of building and deploying web pages

* Data.com → It deals with ~~right~~ Correct data.

Database.com → It is the only database service natively built for social enterprise.

AppExchange → Appexchange is the directory where we can get the in-built applications. we can directly download the application from the Appexchange and we can use it.

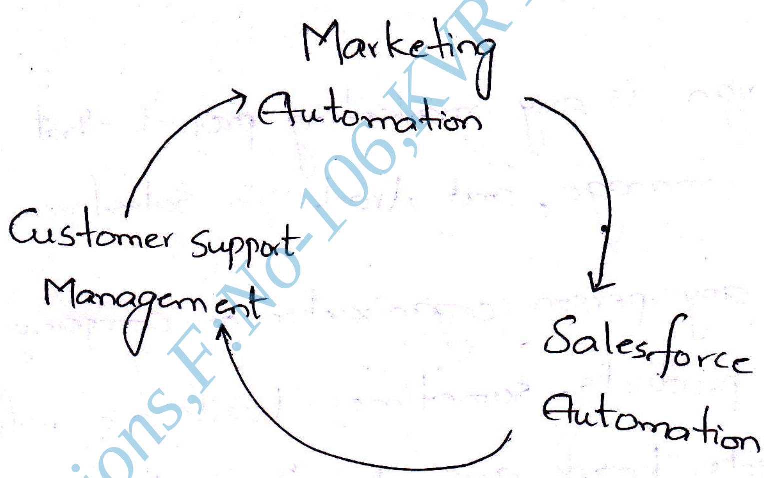
Chatter → It will boost employee productivity with a private and secure social network for company for internal communication.

What is Salesforce Automation:-

* Salesforce Automation is an on-demand Customer Relationship Management System - CRM.
* out-of-box functionality.

Salesforce Automation includes:

* Marketing Management.
* Sales Automation
* Customer support Management.



Salesforce marketing includes

- → Compaign Management
- → Lead Management
- → Search marketing
- → Contact Managment.

Sales Automation includes:

- → Opportunity Management
- → Account Management.

Customer Support Management includes

- → Case Management
- → Solutions Management

i.e Logging cases
Suggesting and delivering solutions
Customer portal

Campaigns: A campaign is any marketing project that we want to plan, manage, and track in Salesforce.

Leads:- A Lead is any person, organization or company that may ~~be~~ be interested in our products. Sometimes leads are referred to as Prospects or suspects. Leads are not yet customers.

Accounts:- An account is an organization, individual or company involved with business such as customers, competitors and partners that wish to track in salesforce.

Contacts:- A contact is any individual or influencer associated with an account that we want to track in Salesforce.

Opportunities:- An opportunity is any potential revenue-generated event ("Sales deal") that we want to track in salesforce.

Cases:- A case is a detailed description of a customer's feed

-ack, problem or question.

Solutions:- A solution is a detailed description of a customer issue and the resolution of that issue. The collection of Organization's solutions is sometimes referred to as the solution knowledge base.

Forecasts:- A forecast is best estimate of how much reven we can generate in a quarter.

Reports:- Reports are summaries and analyses of data, which we can display or print.

Dashboards:- Dashboards give us a real-time snapshot of Corporate metrices and key performance indicators. A dashboard is a group of different charts (or Components that graphically display custom report data.

Calendar and Task:- Activities are both tasks and sched Calendar events. We can define and track activities for many different objects, ~~indue~~ including campaigns, accounts, Contacts, and leads.

Profiles: And Users :-

A) * A profile is a collection of settings and permissions that define how a user access records.

* profiles control a user's permissions to perform different functions in Salesforce.

  * A profile can have many users but a user can have only one profile.

Users: The people who have authenticated username and password to log on to salesforce successfully.

* Each salesforce user must be assigned a profile.

There are two types of profiles

1. standard profiles and
2. Custom profiles.

Standard profiles are provided with Force.com and cannot be renamed or deleted. Custom profiles have the same functi-onality as standardprofiles but can be named. They can also be deleted if there are no users assigned to them.

*To Manage profiles, click setup, and in the Administ-ration setup Area, click Manage Users → Profiles.

B) What does a profile Control ?

profiles control the following:

1. page Layouts : which page layout the user sees.

2. Field Level security : The FLS restricts user's access to view and edit fields.

3. Custom Apps : which standard and custom apps the user can view

4. Tabs : which tabs the user can view.

5. Record Types: which record types are available to the user.

6. Login : The hours and IP Addresses from which the user can log In.

7. Administrative, General and object permissions.

Object permissions :-

The object permissions are divided into two sections, one for standard objects and another for Custom Objects. The permissions are.

Read: The Read permission allows users to view records of this object.

Create: The Create permission permits Read Access and the permission to Create the records to the Object.

Edit: Edit permission allows records in this object to be read and modified.

Delete: This permission enables user to read, edit and remove records from this object. Deleted records are moved to the Recycle Bin, where they can be undeleted or perm-anently erased.

View All and Modify All:- It allow users to view and modify all the fields of all records in object, overriding every other security measure.

** Note: If we give View All and Modify All permissions at a profile level, then the security controls will not work, these permissions overrides the security controls.

Field - Level Security:-

* Restricts users access to view and edit fields

* Overrides any less-restrictive field access settings in page layouts and search layouts.

* Controls which fields users can access in related lists, list views, reports, email and mail merge templates Custom links.

Tab settings:-

The following are the tab settings options

Default ON:- If we want a tab to be displayed.

Default OFF: If we want a tab not to appear on the tab panel but still allowing a user assigned to the profile the choice to turn the tab back on.

Tab Hidden:- If we want the tab to be hidden without an option to the user to turn the tab back on.

List of Standard Profiles:-

There are six (6) standard profiles:

1. System Administrator.
2. Standard User
3. Solution Manager
4. Marketing User
5. Contract Manager
6. Read Only.

* Standard profiles cannot be edited, but the Tab settings &app for standard profiles are always Configurable.

System Administrator: "Super User" - Can Customize everything in the application

Standard User: Can View, edit and delete their own records.

Solution Manager: Standard User permissions + Can manage published solutions + Can manage solution Categories.

Marketing User: Standard User permissions + Can import leads for the organization.

Contract Manager: Standard User permissions + Can edit, approve, activate and delete Contracts.

Read Only: Can only View records.

* Enterprise, Developer and unlimited System Administrators Can Create an unlimited number of Custom profiles from scratch. However, the recommended method to create a Custom profiles ~~to~~ is to "Clone" and modify an existing profile.

Login Hours & Login IP Ranges:

* Sets the hours when users with a particular profile can use the system.

* sets the IP Addresses from which users with a particular profile can log In.

*****

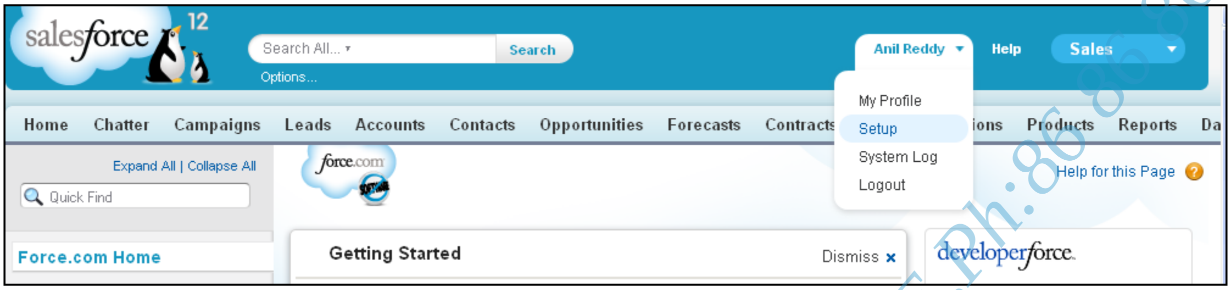
* We cannot delete the user from the salesforce.com.

* we can deactivate the user, so user can not able to login to salesforce.com.

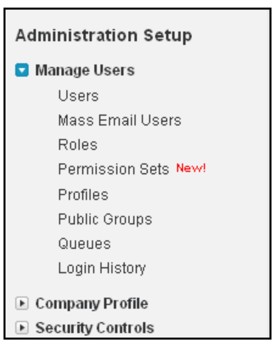
Profiles:

First way of creating a Profile:

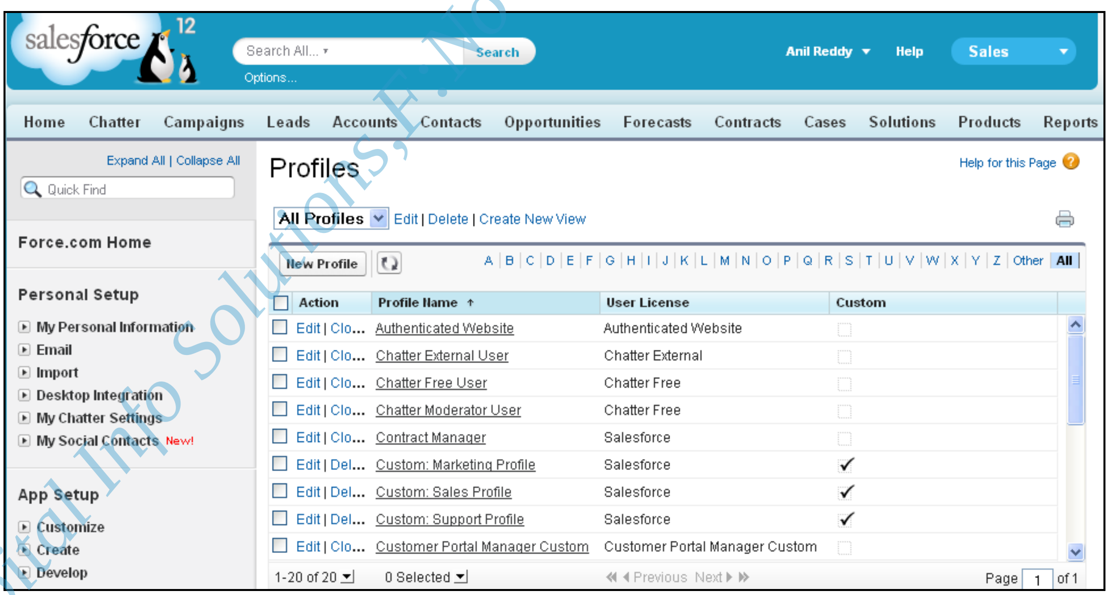
Click on the Your Name →Setup



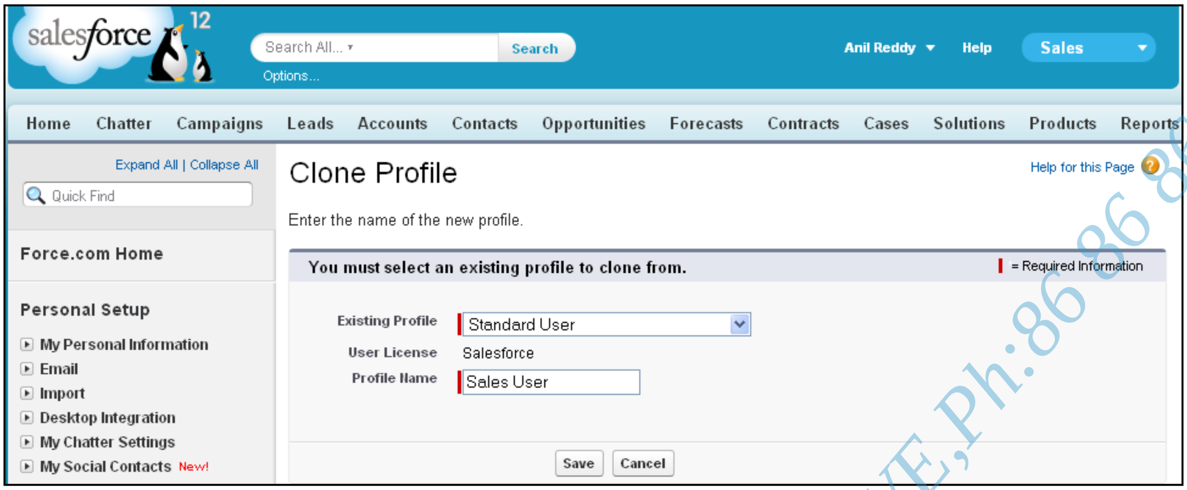
Go to Administration Setup →Manage Users →Click on Profiles



Click on the "New Profile" button for creating a Profile

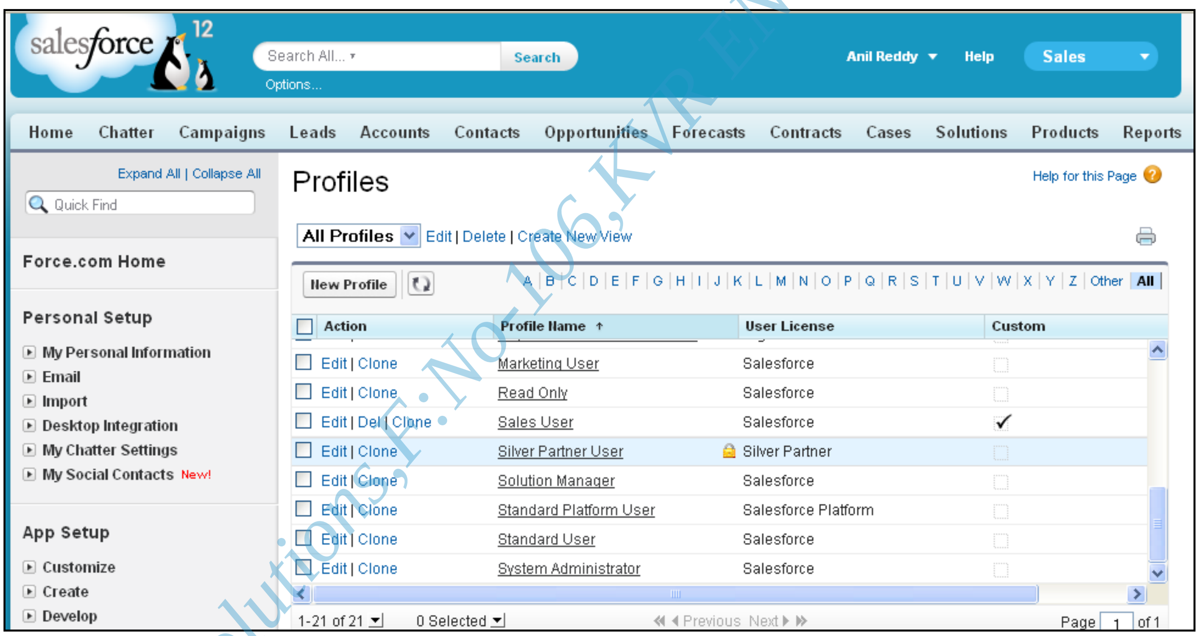


Give Profile Name here

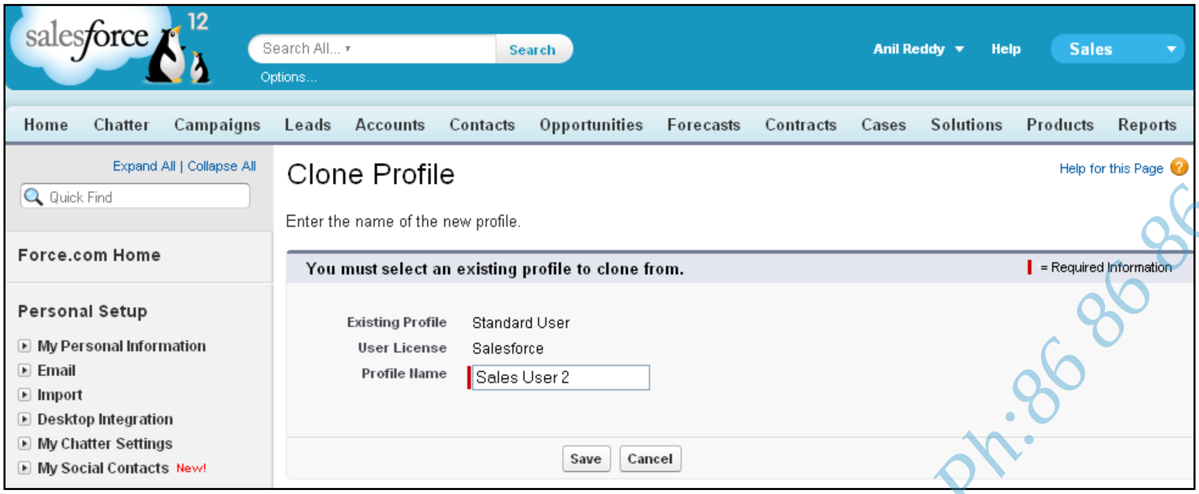


Second way of creating a profile: Cloning the existing profile

Click on “Clone” link for cloning the profile

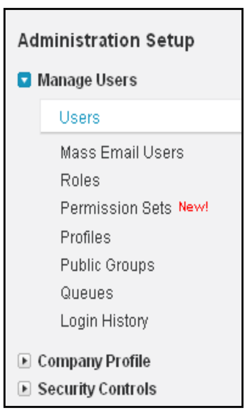


Give Profile Name here and click on “Save” button

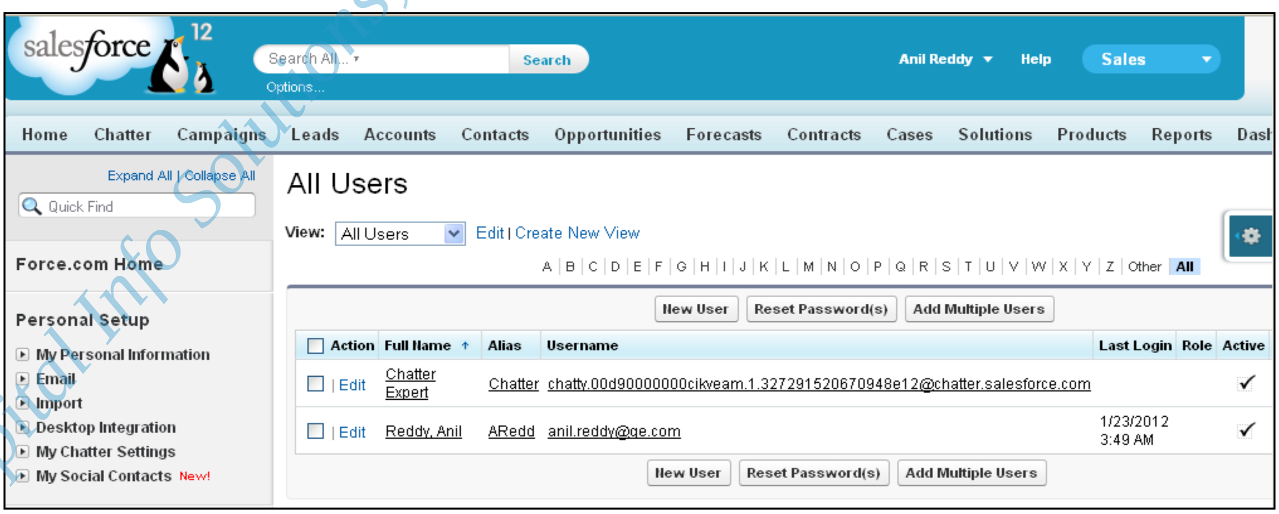


Users:

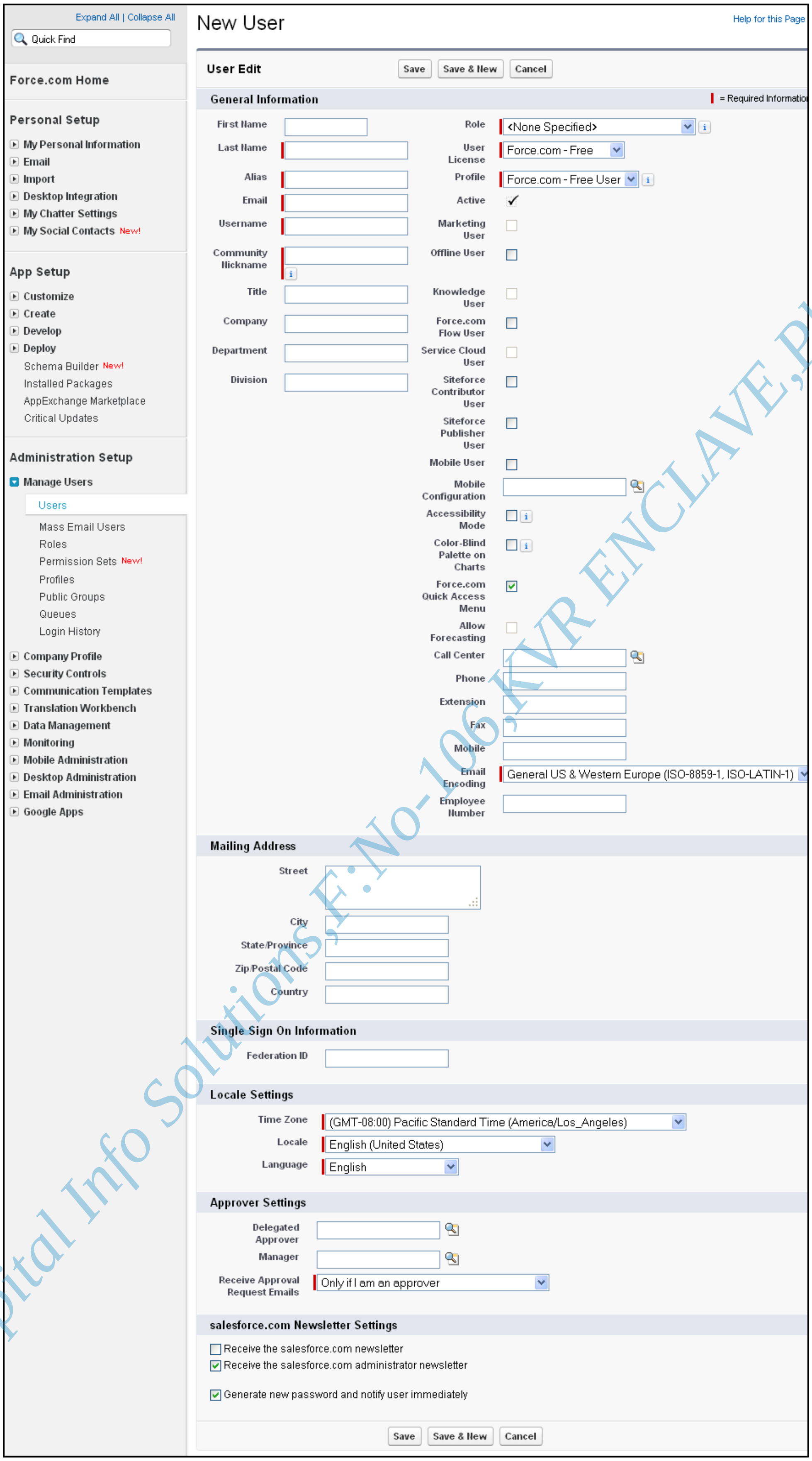
Go to Administration Setup →Manage Users →Click on Users



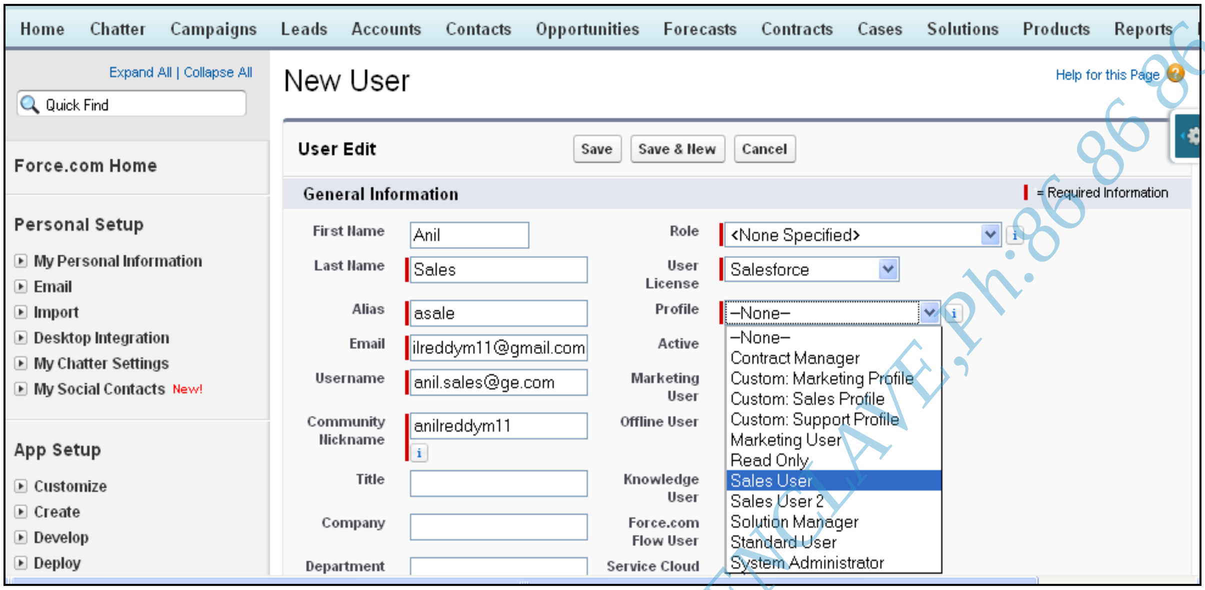
Click on "New User" button for creating a user in Salesforce.com



Enter the details in the following page and click on “Save” button



The following screenshot shows the information about the assigning profile to user



Permission Sets:-

* A permission set is a collection of settings and permissions that give users access to various functions. The settings and permissions in permission sets are also found in profiles, but permissions sets extend user's functional access without changing their profiles.

* For example, to give users access to a custom object, create a permission set with the required permissions for the object, and assign the permission set to the users.

* We never have to change profiles, or create a profile for a single use case.

↓

while users can have only one profile, they can have multiple permission sets.

Permission sets include the following:

→ Object and field permissions

→ App Permissions

→ Apex class access

→ Visualforce page access

→ System Permissions.

* The profile will have many users. If we give any permissions at the profile level then all the users assigned to that profile will effect.

If we want to give the permissions to only one user without changing the profile, then we have to create permission sets and assign to the users.

<u>Note</u>: * A profile have many Users. But a user must have assigned to the single profile

* Many permission sets we can assign it to single user.

Creating Permission Sets:-

Go to the following path:

Your Name
↳ setup
↳ Administration setup
↳ Manage Users
↳ permission sets
↓
1. click on "New" button
2. Enter Label, API Name and Description of permission set.
3. Select "Salesforce" as User License in the select the type of users who will use this permission set section
4. Click on "Save" button
5. Select either Object and Field, App, Apex class, VF page per-missions
6. Select the object which we want to give permissions,
7. Click on "Edit" button and give the related permissions
8. click on "Save" button.

Assigning Permission Sets:-

From the user detail page we can assign permission sets or remove a permission set assignment.

Go to the following path for assigning Permission sets to user.

Click Your Name
↳ setup
↳ Manage Users
↳ users
↓

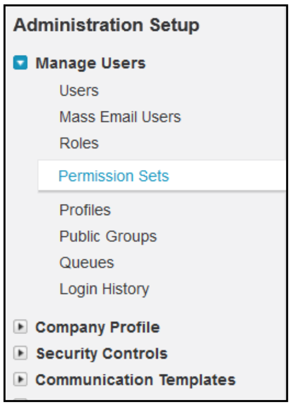
1. Select the user which we want to assign Permission set.

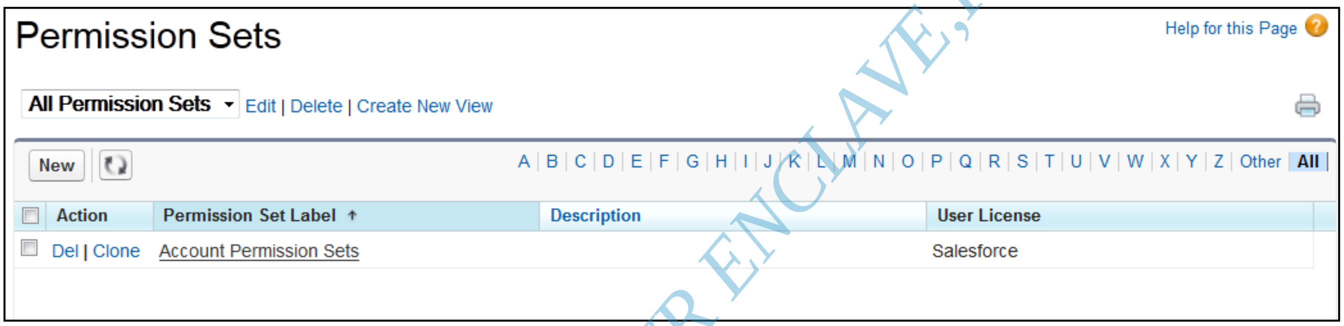
2. In the Permission set Assignments related list, click "Edit Assignments."

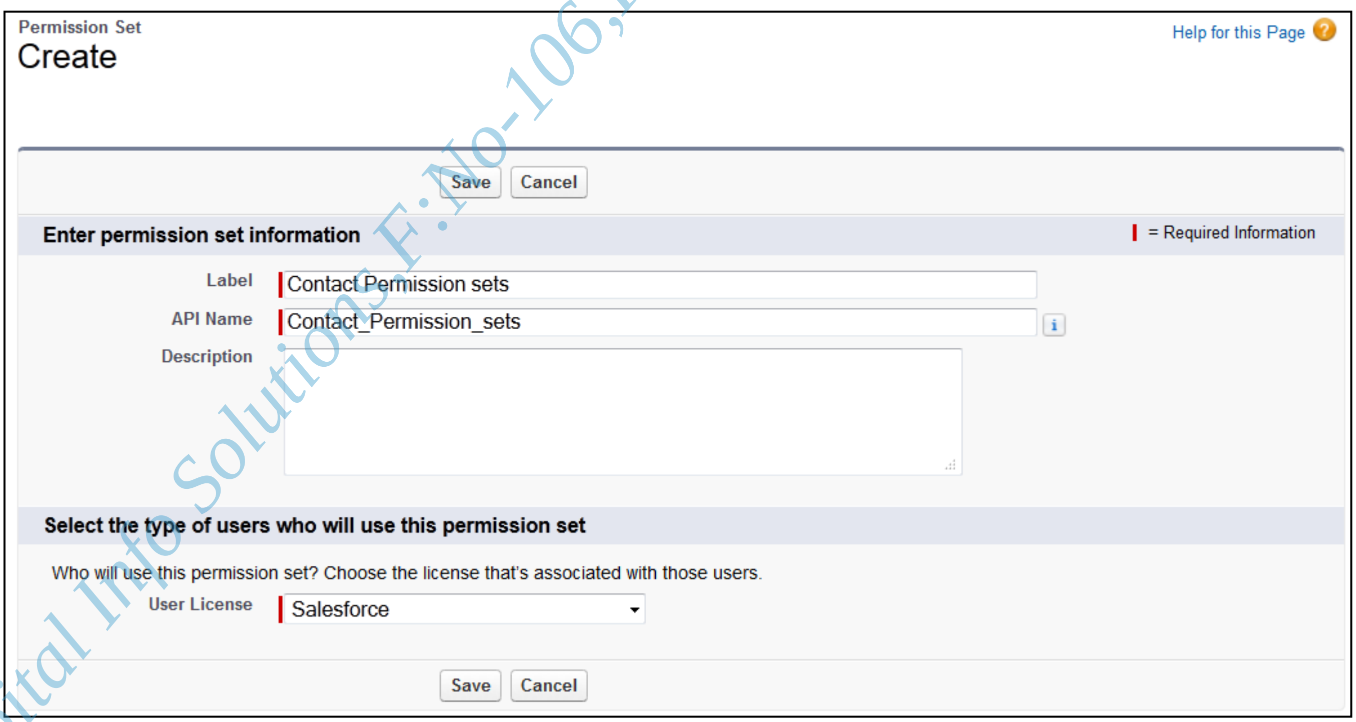
3. To assign a permission set, select it from the Available Permission sets box and click "add."

To remove a permission set assignment, select it from the Enables permission sets box and click "Remove". button

Permission Sets:

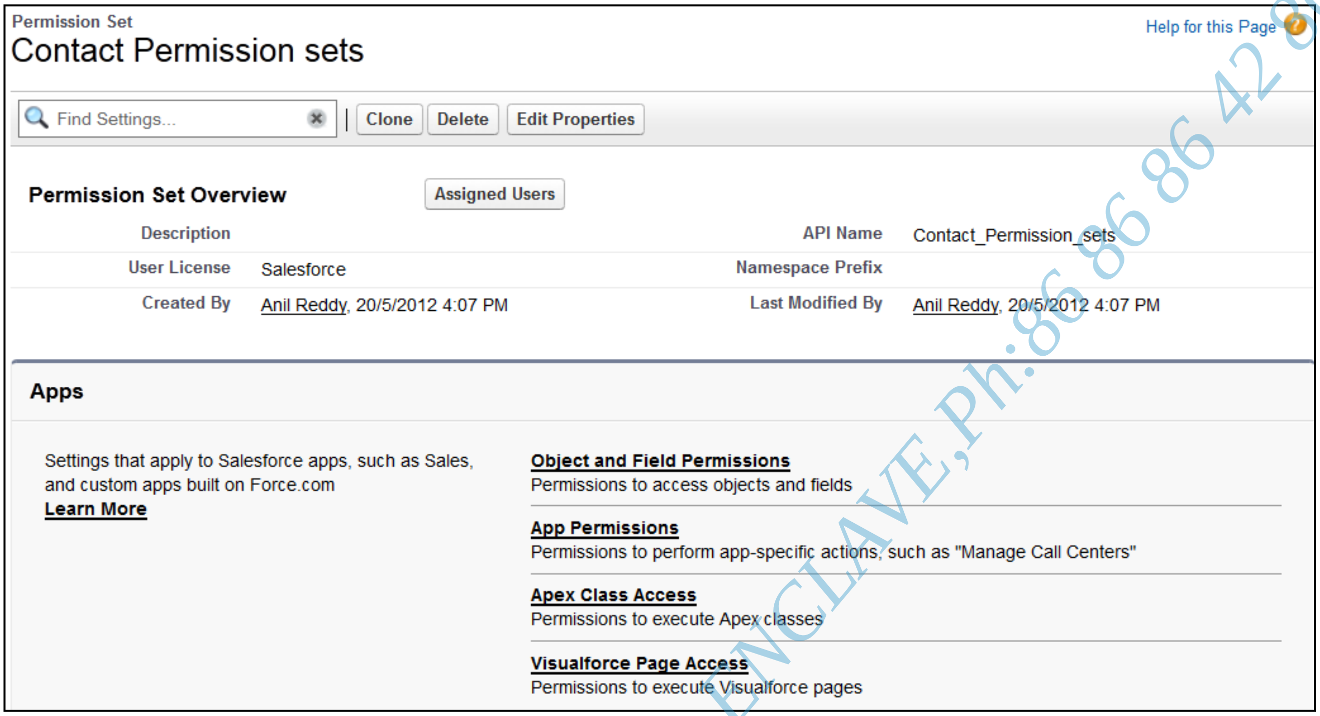




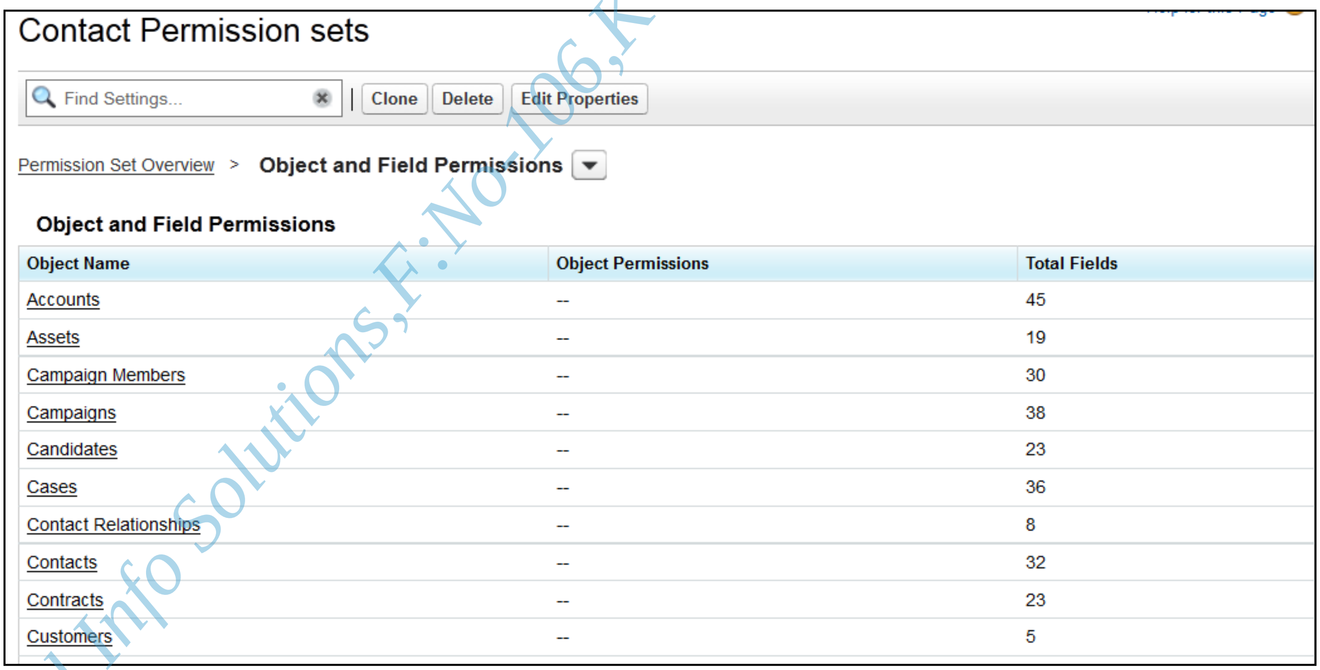


Click on the permissions from the following screenshot.

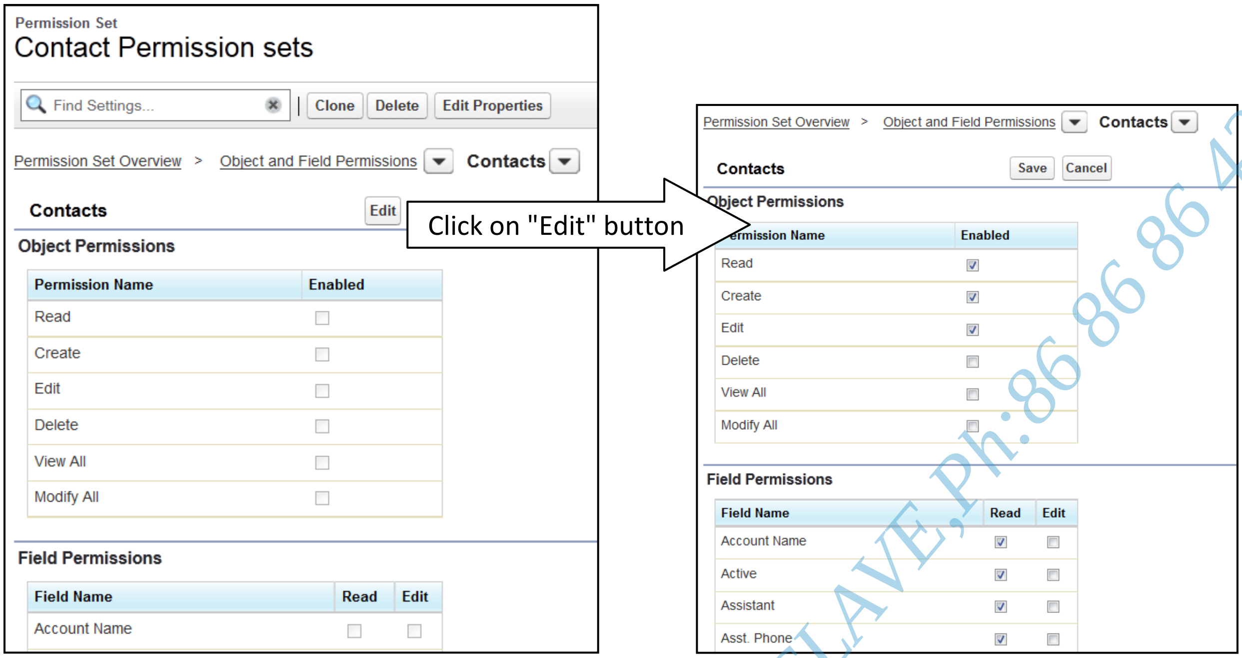
Ex: Click on Object and Field Permissions



Click on the "Contacts" from the following screen.

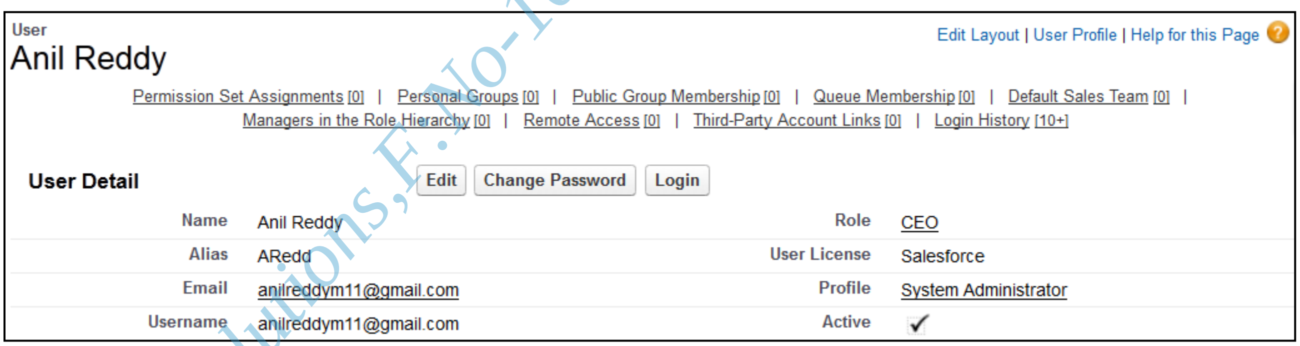


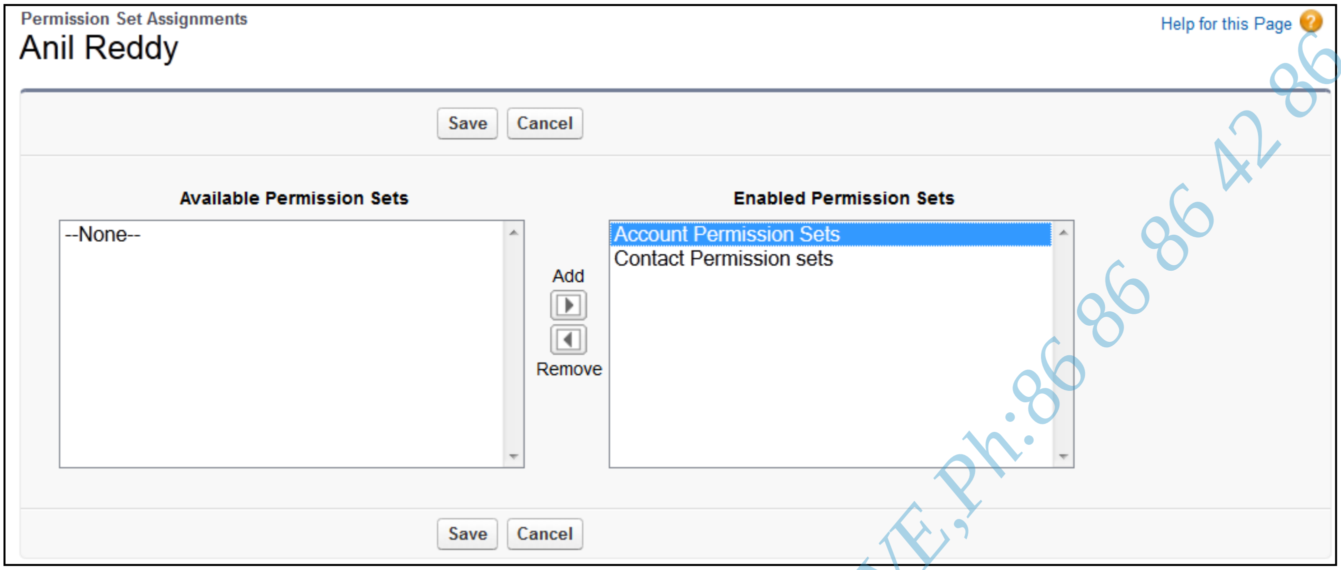
Object Name	Object Permissions	Total Fields
Accounts	--	45
Assets	--	19
Campaign Members	--	30
Campaigns	--	38
Candidates	--	23
Cases	--	36
Contact Relationships	--	8
Contacts	--	32
Contracts	--	23
Customers	--	5



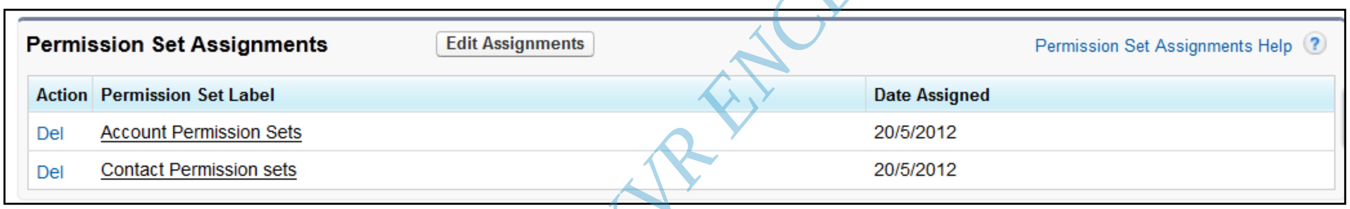
Assigning Permission Sets to Users:

Go to the User's details page which we want to give access and go to the "Permission Set Assignments" related list.





Click on "Save" button and check in the User's detail page



Apps:

An application is a logical container for all of the objects, tabs, processes and services associated with a given business function.

* An App is a group of tabs that work as a unit to provide functionality.
* we can customize existing app to match the way to work, or build new apps by grouping standard and custom tabs.
* A Force.com custom app consists of a name, a description an ordered list of tabs, and optionally a custom logo and a landing page.
* Salesforce provides standard apps such as
    * Sales
    * Call center
    * Marketing
    * Community
* Users can switch between apps using the Force.com app drop-down menu at the top-right corner of every page.

There are two types of applications

1. Custom App
2. Service cloud Console.

Creating a Custom Application:-

path for creating a custom application is

Your name
  ↳ set up
    ↳ App set up
      ↳ Create
        ↳ Apps
          ↳ "New" button.

Step 1: ~~slee~~ select the type of the application to create and click on "Next" button.

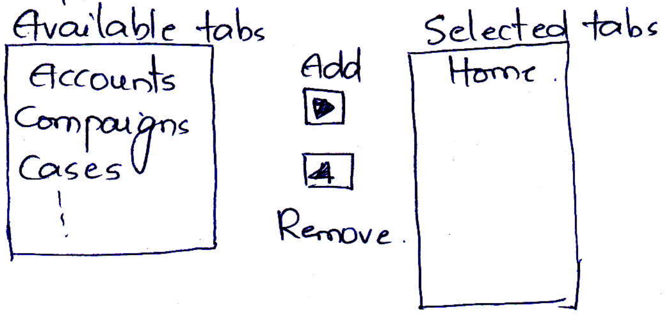
Step 2: Enter a label for the application, a name, and a description, and then click the "Next" button.

Ex: Institute, pharmacy... etc.

Step 3: Optionally, select an image to be displayed as the logo for our application. This image is shown in the upper left corner when our application is active.

Tip: To prepare an image for use as an application logo, first go to the documents tab and click the New button. Check the Externally Available Image check box, enter a name to identify the image and click the Browse button to locate a file on your computer. click the save button to upload the image.

step 4: This screen is for selecting the tabs to be included in the Custom application. click on the "Next" button



* If we want to add the tabs to your application, then select the particular tabs from the available tabs and click on "Add" Arrow mark, ~~then~~ so that we can see those tabs in the selected tabs.

step 5:-

This screen shows the restrict access to our application by profile. choose the user profiles for which this Custom app will be visible in Force.com menu.

* we can specify this Custom app as the default custom app of a profile; meaning that new users who have the
* Profile will see this Custom app when they log in for the first time.

* If a Custom app is set as the default for a profile, then we can not make it invisible for that profile.

* Then click on the "Save" button.

* After clicking on the "Save" button, we are returned to the list of applications, but it now contains our new application. If we active our application by selecting it from the list ~~fr~~ in the upper-right corner drop-down, we can see the list of tabs which we have selected before. in the step 4.

Service cloud Console:-

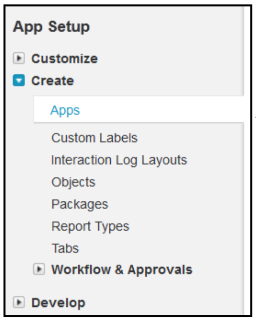
The service cloud console is designed for users in fast-paced environments who need to find, update and Create records in salesforce quickly.

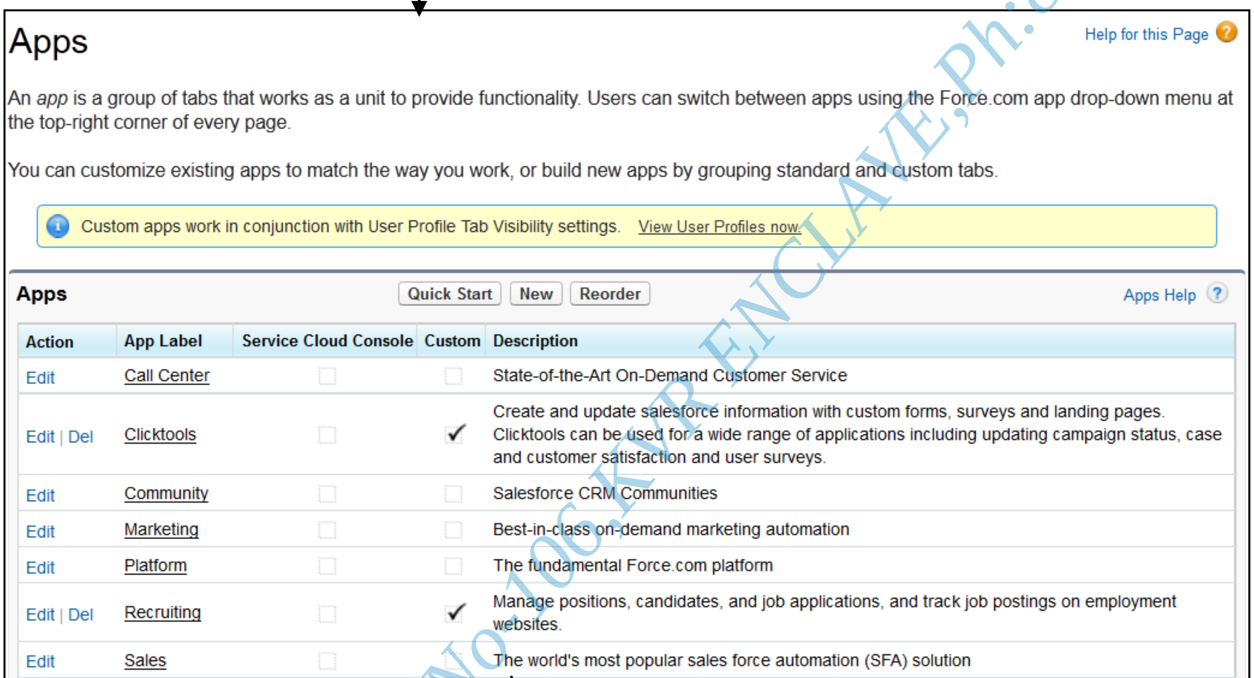
* The ~~Salesforce~~ service cloud Console displays all the records as tabs, so that users can quickly find, update and create records on one screen.

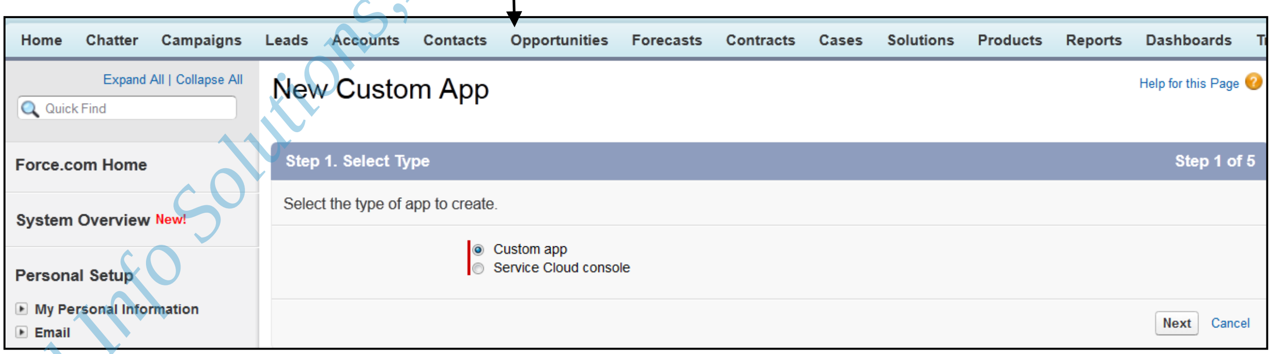
* primary tab displays the main record to work. ~~kk~~ on, ~~ti~~ like an account

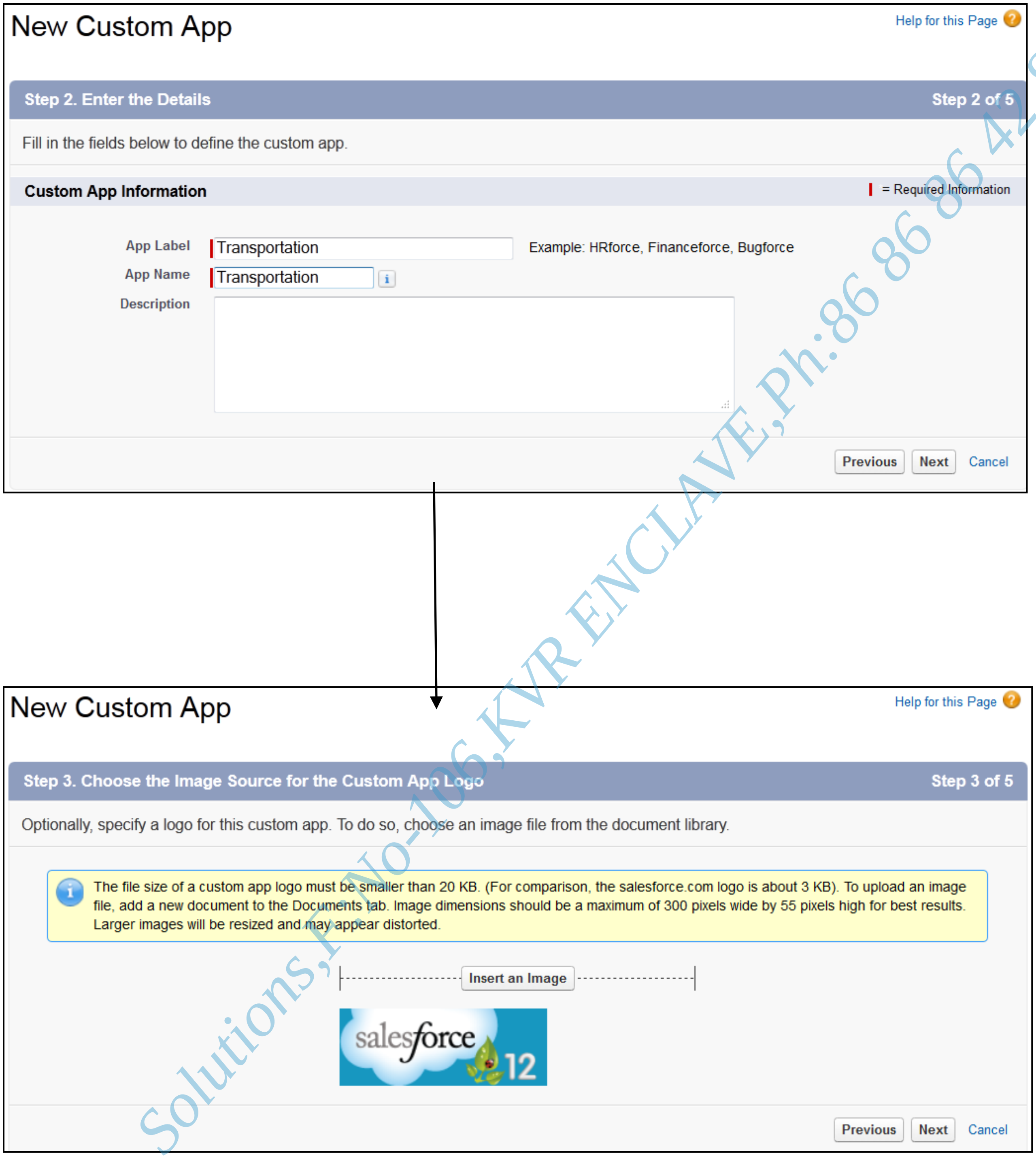
  Subtabs display related records, like cases or Contacts on an account.

Apps:

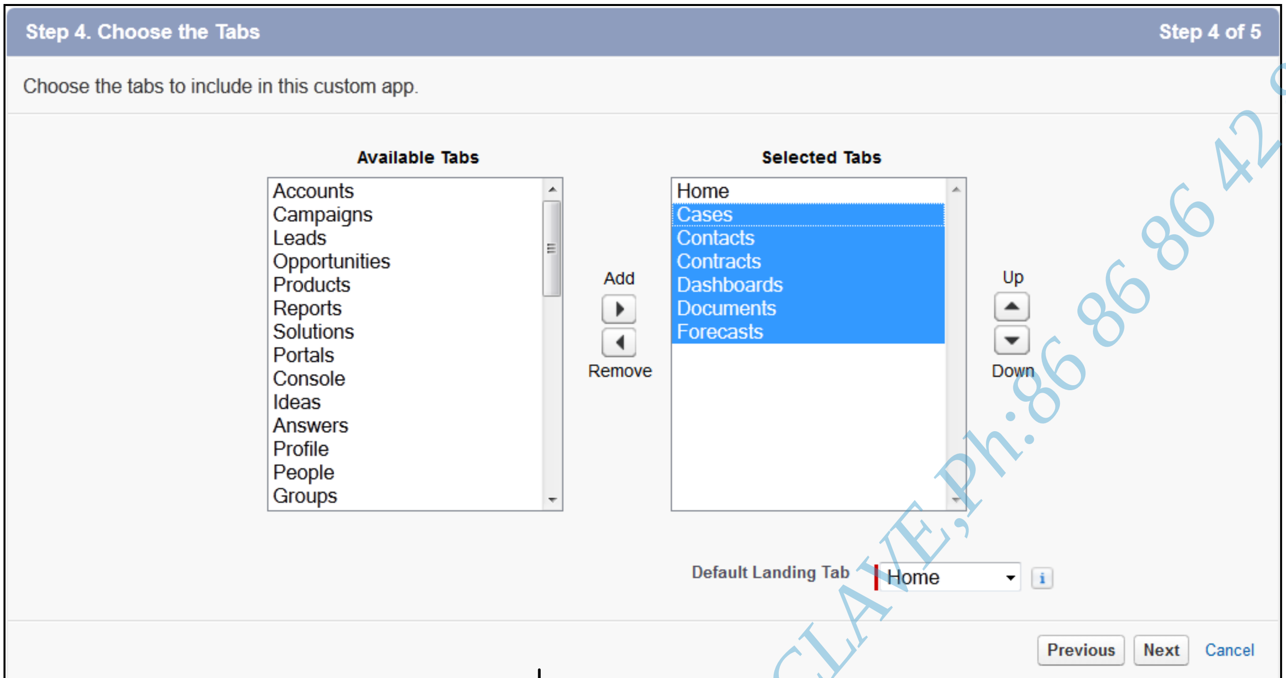

App Setup
Customize
Create
Apps
Custom Labels
Interaction Log Layouts
Objects
Packages
Report Types
Tabs
Workflow & Approvals
Develop

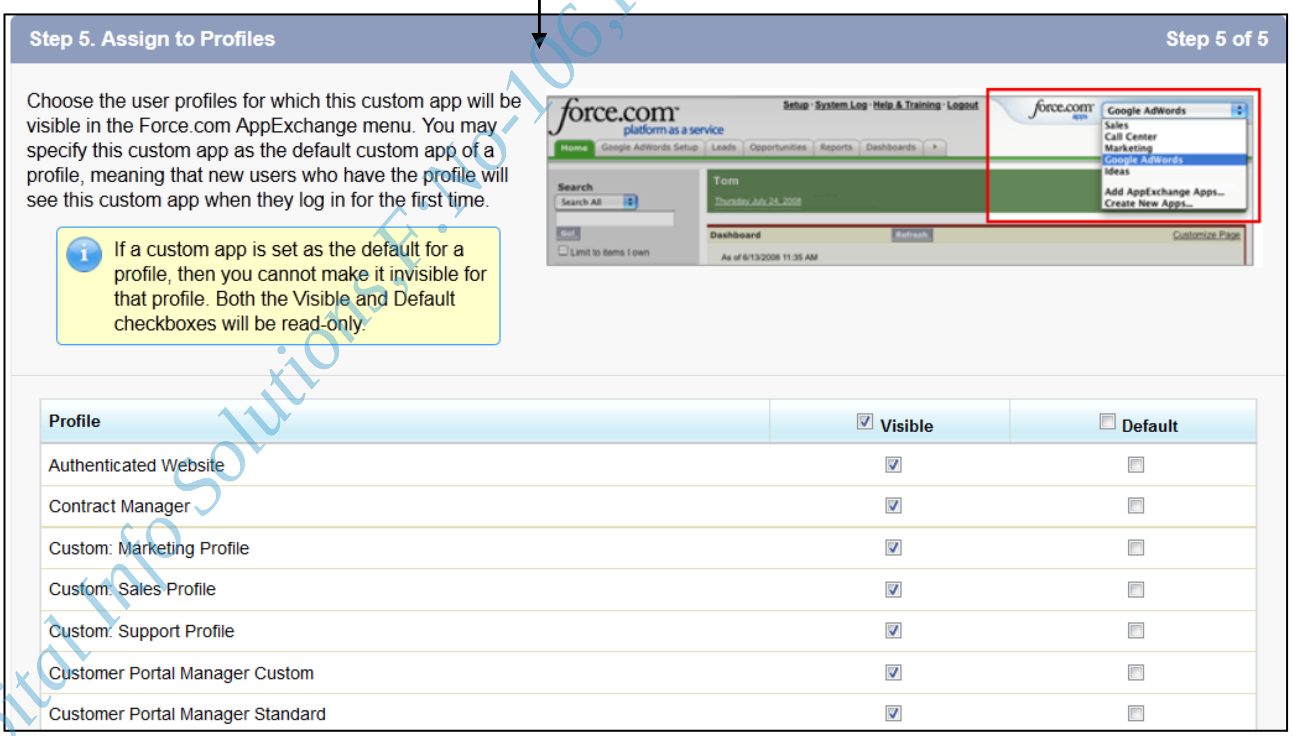

Apps
Help for this Page
An app is a group of tabs that works as a unit to provide functionality. Users can switch between apps using the Force.com app drop-down menu at the top-right corner of every page.
You can customize existing apps to match the way you work, or build new apps by grouping standard and custom tabs.
Custom apps work in conjunction with User Profile Tab Visibility settings. View User Profiles now.
Apps
Quick Start
New
Reorder
Apps Help
Action
App Label
Service Cloud Console
Custom
Description
Edit
Call Center
State-of-the-Art On-Demand Customer Service
Edit | Del
Clicktools
Create and update salesforce information with custom forms, surveys and landing pages. Clicktools can be used for a wide range of applications including updating campaign status, case and customer satisfaction and user surveys.
Edit
Community
Salesforce CRM Communities
Edit
Marketing
Best-in-class on-demand marketing automation
Edit
Platform
The fundamental Force.com platform
Edit | Del
Recruiting
Manage positions, candidates, and job applications, and track job postings on employment websites.
Edit
Sales
The world's most popular sales force automation (SFA) solution


Home
Chatter
Campaigns
Leads
Accounts
Contacts
Opportunities
Forecasts
Contracts
Cases
Solutions
Products
Reports
Dashboards
Expand All | Collapse All
Quick Find
Force.com Home
System Overview New!
Personal Setup
My Personal Information
Email
New Custom App
Help for this Page
Step 1. Select Type
Step 1 of 5
Select the type of app to create.
Custom app
Service Cloud console
Next
Cancel

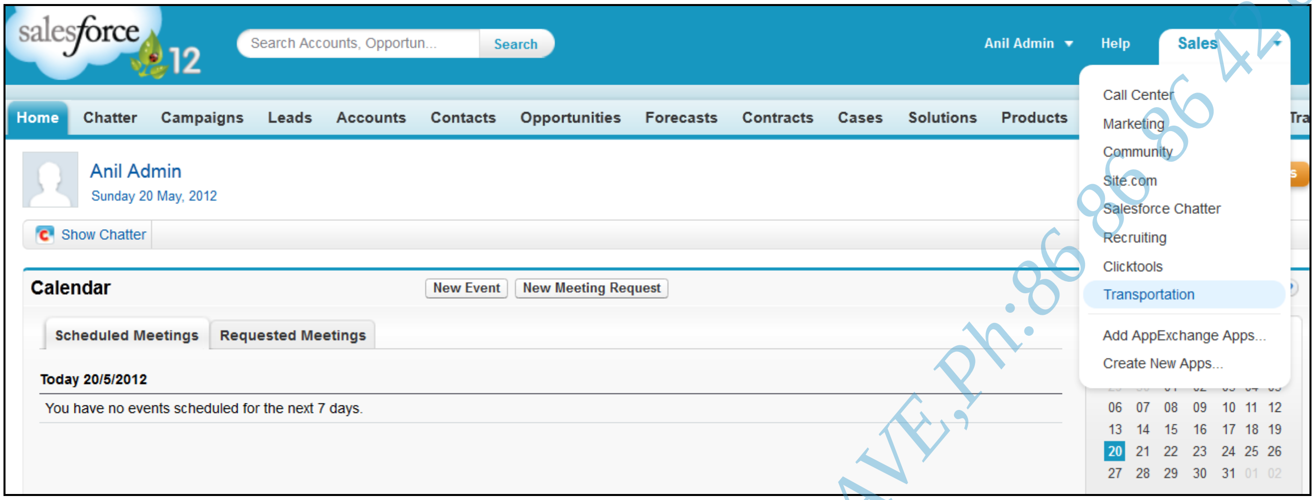


New Custom App
Help for this Page
Step 2. Enter the Details
Step 2 of 5
Fill in the fields below to define the custom app.
Custom App Information
= Required Information
App Label
Transportation
Example: HRforce, Financeforce, Bugforce
App Name
Transportation
Description
Previous
Next
Cancel
New Custom App
Help for this Page
Step 3. Choose the Image Source for the Custom App Logo
Step 3 of 5
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, add a new document to the Documents tab. Image dimensions should be a maximum of 300 pixels wide by 55 pixels high for best results. Larger images will be resized and may appear distorted.
Insert an Image
salesforce 12
Previous
Next
Cancel


Step 4. Choose the Tabs
Step 4 of 5
Choose the tabs to include in this custom app.
Available Tabs
Accounts
Campaigns
Leads
Opportunities
Products
Reports
Solutions
Portals
Console
Ideas
Answers
Profile
People
Groups
Add
Remove
Selected Tabs
Home
Cases
Contacts
Contracts
Dashboards
Documents
Forecasts
Up
Down
Default Landing Tab
Home
Previous
Next
Cancel


Step 5. Assign to Profiles
Step 5 of 5
Choose the user profiles for which this custom app will be visible in the Force.com AppExchange menu. You may specify this custom app as the default custom app of a profile, meaning that new users who have the profile will see this custom app when they log in for the first time.
If a custom app is set as the default for a profile, then you cannot make it invisible for that profile. Both the Visible and Default checkboxes will be read-only.
Profile
Visible
Default
Authenticated Website
Contract Manager
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Customer Portal Manager Custom
Customer Portal Manager Standard

There are standard and custom apps that are accessed using the App menu located at the top-right of the Salesforce page as shown in the following screenshot:



Objects:

There are two types of objects

1. standard objects
2. custom objects.

* Objects are database tables that allow us to store data specific to organization in salesforce.com.

Standard Objects: The objects provided by salesforce.com is called standard objects.

Accounts	Campaigns	Contracts
Contacts	Cases	Forecasts
Opportunities	Solutions	Users
Leads	Reports	Ideas
Products	Dashboards	Answers

Custom Objects:-

* Custom objects are the heart of any application

↓

Custom objects provide a structure for storing data.

Custom objects have properties such as:

* Custom fields.
* Relationship to other objects
* Page layouts
* A custom user interface tab (optional)

Creating Custom object:

The following procedure we have to follow for creating a Custom object.

click on your name
↓
Set up
↓
App setup
↓
Create
↓
Objects
↓
click on "New Custom object" button

Give Label $\boxed{}$

plural Label $\boxed{}$

Object Name $\boxed{}$

Record Name → ~~decid~~ According to the Data type we have selected below, the Record Name will work.

Text

Auto Number.

* Allow Reports ☑ → If we check this checkbox, going forward we ~~w~~ can create Reports for this object.

Allow Activities ☑ → If we check this checkbox, we can create Activities for this object

Activities → New TASK
Activities → New EVENT

Track Field History ☑ → If we check this checkbox, we can ~~track~~ get track every change made to fields in records for a table.

* we can track upto 20 fields for a object.

In Development ⦿ → If we check this checkbox, development only completed but without testing.

Deployed ⦿ → If we check this checkbox, both development and testing completed and it is ready for deployment into the production environment.

* The following options are available only when a custom object is first created.

☑ Add Notes and Attachments related list

☑ Launch New Custom Tab wizard after saving this Custom object

↓

Click on SAVE button.

Note: If we doesnot check the option called Launch New Custom Tab wizard from above step, the object will save without tab appearance, then we have to create tab again for this object.

If we check the option, then the object will save and tab will Created and appeared.

Tabs:-

Tabs:

* Every tab serves as the starting point for viewing, editing and entering information for a particular object. when we click a tab at the top of the page, the corresponding homepage for the object appears.

Custom Tabs:-

A Custom tab is a user interface component we create to display custom object data or other web content embedded in the application.

There are two types of Custom tabs:

Custom object Tabs:-

Display the data of our Custom object in a user interface tab.

Web Tabs:-

Display any external web based application or web page in a user interface tab

* Custom Tabs will have a Tab style (Color scheme and icon).

Visualforce Tabs :-

Allow us to embed VF pages.

Note: New Custom Tabs extend salesforce.com functionality or to build new application functionality.

path for Creating a Tab:-

Your Name → setup → App setup → Create → Tabs

Click on the "New" button

In the object drop down list, select the object

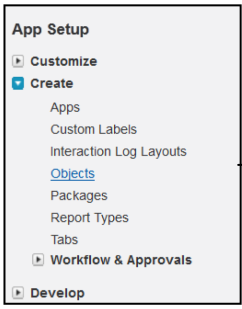
* click ~~on~~ the tab style lookup icon to launch the tab style selection.

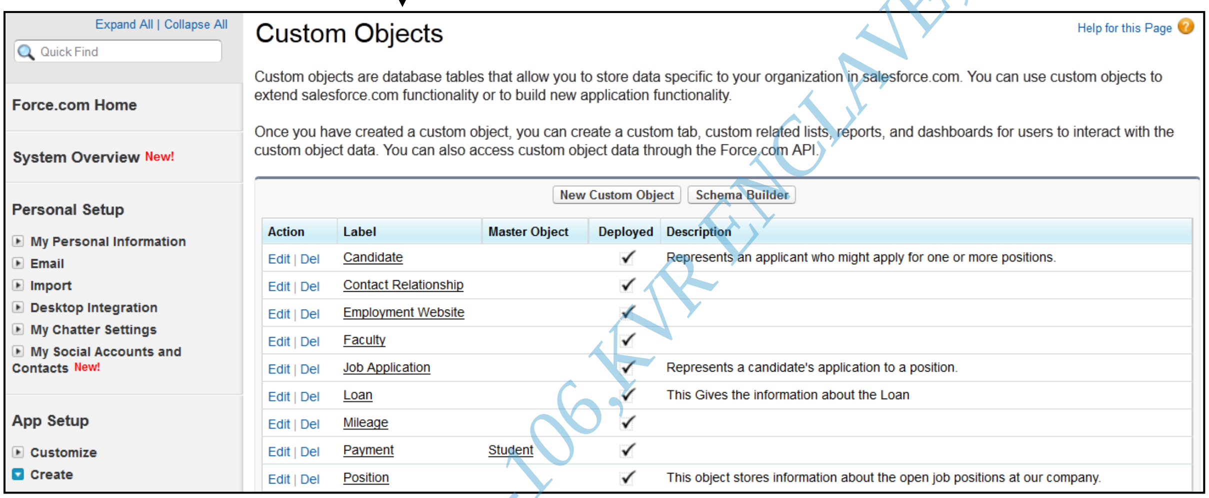
* Click on the "Next" button, here ~~the~~ we have to add the new Custom tab to profiles for the availability to a user.

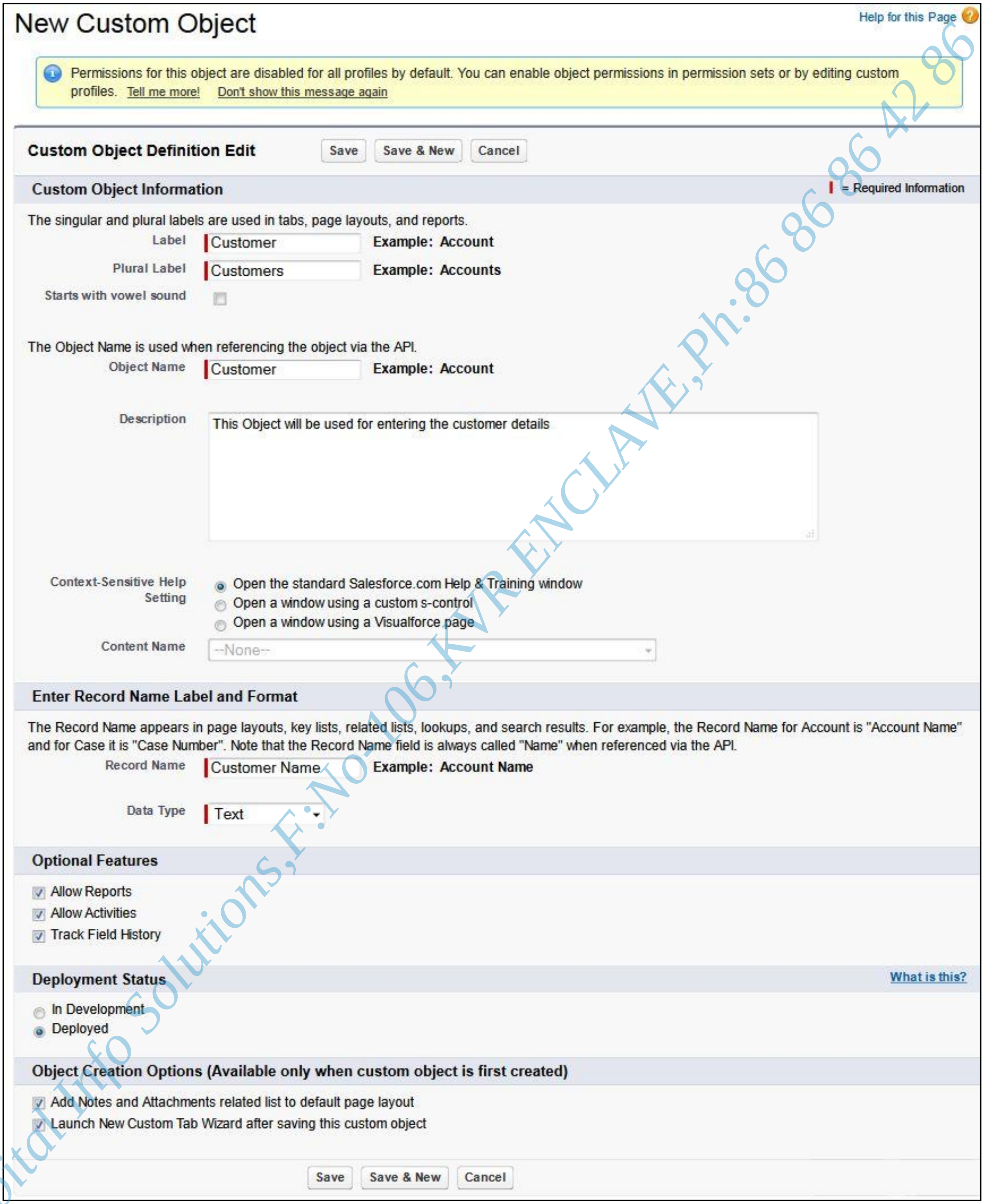
* Click on the "Next" button, here choose the Custom apps for which the new Custom tab will be available.

* Click on "Save" button.

Objects:

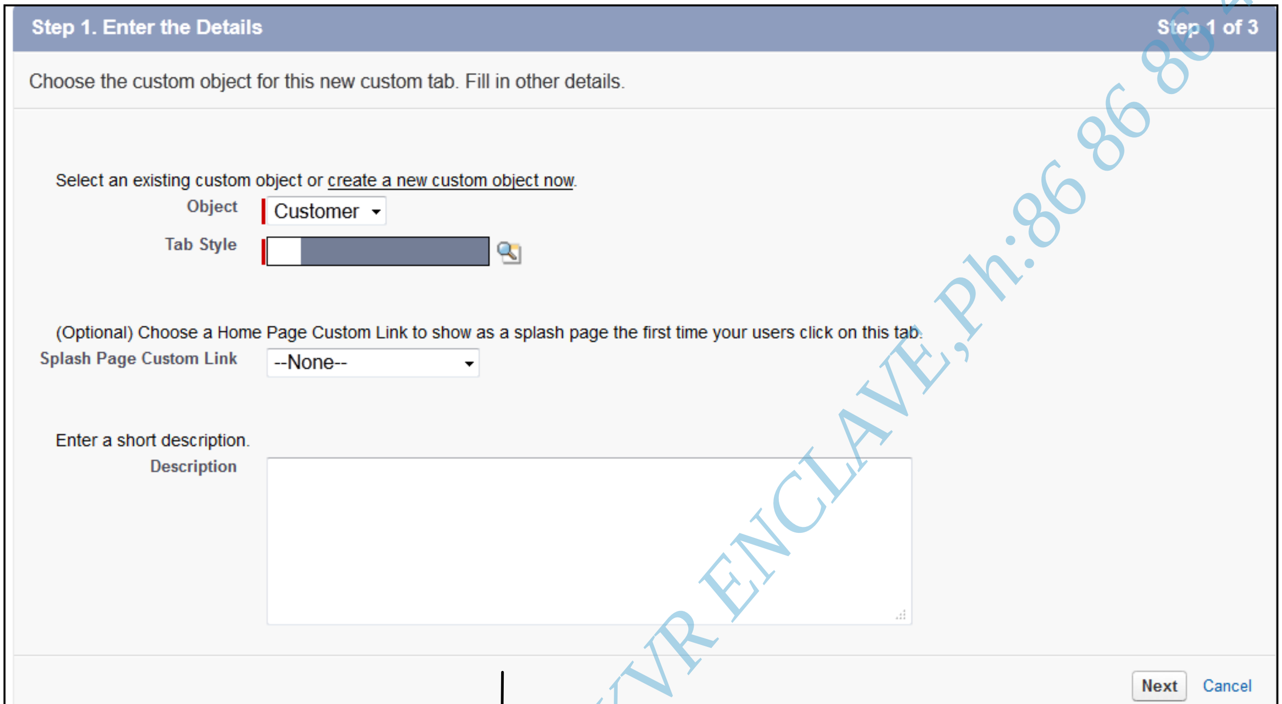

App Setup
Customize
Create
Apps
Custom Labels
Interaction Log Layouts
Objects
Packages
Report Types
Tabs
Workflow & Approvals
Develop

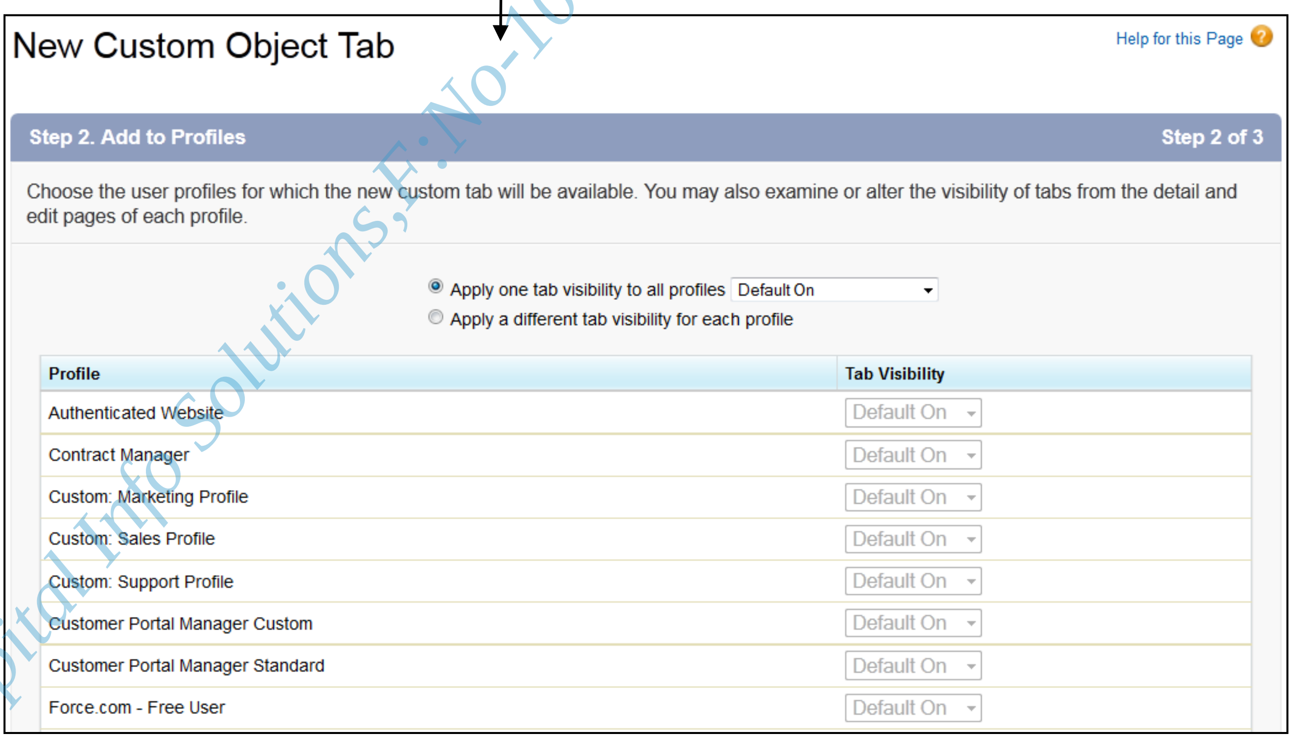

Expand All | Collapse All
Quick Find
Force.com Home
System Overview New!
Personal Setup
My Personal Information
Email
Import
Desktop Integration
My Chatter Settings
My Social Accounts and Contacts New!
App Setup
Customize
Create
Custom Objects
Help for this Page
Custom objects are database tables that allow you to store data specific to your organization in salesforce.com. You can use custom objects to extend salesforce.com functionality or to build new application functionality.
Once you have created a custom object, you can create a custom tab, custom related lists, reports, and dashboards for users to interact with the custom object data. You can also access custom object data through the Force.com API.
New Custom Object
Schema Builder
Action | Label | Master Object | Deployed | Description
Edit | Del Candidate ✓ Represents an applicant who might apply for one or more positions.
Edit | Del Contact Relationship ✓
Edit | Del Employment Website ✓
Edit | Del Faculty ✓
Edit | Del Job Application ✓ Represents a candidate's application to a position.
Edit | Del Loan ✓ This Gives the information about the Loan
Edit | Del Mileage ✓
Edit | Del Payment Student ✓
Edit | Del Position ✓ This object stores information about the open job positions at our company.

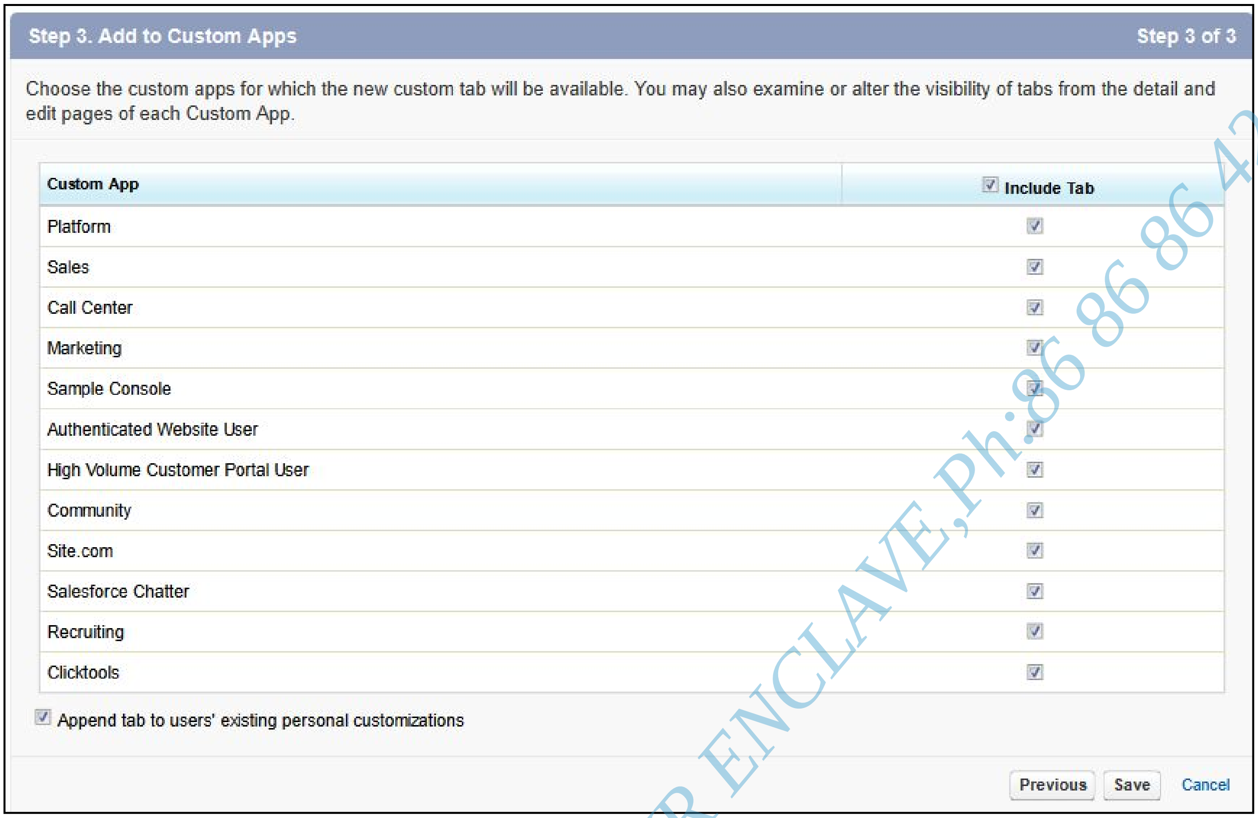

New Custom Object
Help for this Page
Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. Tell me more! Don't show this message again
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
Customer
Example: Account
Plural Label
Customers
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Customer
Example: Account
Description
This Object will be used for entering the customer details
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Open a window using a custom s-control
Open a window using a Visualforce page
Content Name
--None--
Enter Record Name Label and Format
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
Record Name
Customer Name
Example: Account Name
Data Type
Text
Optional Features
Allow Reports
Allow Activities
Track Field History
Deployment Status
What is this?
In Development
Deployed
Object Creation Options (Available only when custom object is first created)
Add Notes and Attachments related list to default page layout
Launch New Custom Tab Wizard after saving this custom object
Save
Save & New
Cancel

If the "Launch New Custom Tab Wizard after saving this custom object" is checked while creating the object, then after clicking on the save button, Enter the details for the tab.

The following screenshots gives the creation of the tab for an object






Step 3. Add to Custom Apps
Step 3 of 3
Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.
Custom App
Include Tab
Platform
Sales
Call Center
Marketing
Sample Console
Authenticated Website User
High Volume Customer Portal User
Community
Site.com
Salesforce Chatter
Recruiting
Clicktools
Append tab to users' existing personal customizations
Previous
Save
Cancel

* By default for every custom object four fields are created those are

1. Created By
2. Last Modified By

both fields are used for audit fields.

3. Owner
4. Record Name.

Field Creation:-

~~Thre~~ * A field is like a database column. Object fields store the data for our object records.

* Custom objects automatically include some standard fields which i mentioned above.

* Create Custom fields to store additional Information.

There are two types of fields.

1. standard fields
2. Custom fields.

Standard fields:	Custom fields
1. we cannot delete	1. we can delete Custom fields
2. We can not Create any more standard fields	2. we can create more Custom fields.
3. Don't have API Name	3. Have API Name.

API means Application Program Interface.
↓
we have to add this in formula fields and Variables whatever we want to declare is called API Names.

Ex: Field Name = Active

API Name = Active__c

~~Steps~~ path for Creating fields for ~~Sa~~ standard objects:

Your Name
↳ Set up
↳ App Setup
↳ ~~Set~~ Customize
↓
Select the Object
↓
Click on Fields
↓
Go to Custom fields and Relationships
↓
click on " New" button.

path for Creating fields for Custom ~~fields~~ objects :-

Your Name
↳ set up
↳ App setup
↳ Create
↳ objects
↳ click on Any object
↓
Go to the Custom Fields & Relationships Section
↓
click on "New" button.

Steps for Creating a field:-

step 1: choose the field type which specifies the type of information that the Custom field will contain.

i) Auto Number:-

A system generated sequence number that uses a display format we define. The number is automatically incremented for each new record.

Ex: If the display format is

Acc-{000}

starting Number = 000

For the first record, ~~Acc~~ the field value is

Acc-{000}

and for the second record, the field value is Acc-{001}.

and so on ....

ii) Checkbox:

Allows users to select a True (checked) or False (unchecked) value.

The user interface should be like

⊙ → checked (True)

○ → Unchecked (False).

iii) Currency :-

Allows users to enter a dollar or other currency amount value and automatically formates the field as a currency amount.

If the field value is 1000, then in the detail page ~~the~~ it automatically adds the dollar symbol before the value

Ex: $ 1000, we can Enter upto 18 digits
14 integer, 4 decimals

iv) Date:

Allows users to enter a date or pick a date from a popup calendar.

Ex: 4/2/2012

v) Date/Time :- Allows users to enter a date and time, or pick a date from a popup calendar. when users click a date in the popup, that date and the current time are entered into the Date/Time field.

Ex: 4/2/2012 12:46 PM

vi) Email:

Allows users to enter an email address, which is validated to ensure proper format.

The user must specify the proper format for the Email field inorder to save the record.

Ex: xrz@gmail.com

xyz@abc.com.

vii) Number: Allows users to enter any number. Leading zeros are removed.

we can enter upto 18 digits

14 digits for integer place and

4 digits for decimal place

Ex: $\underbrace{123456\ldots 14\text{ digits}}_{14\text{ digits}} \cdot \underbrace{6789}_{4\text{ digits}}$

viii) percent:

Allows users to enter a percentage number.

Ex: If we enter "50" as a field value, it automatically adds the percent sign to the number (50%.)

ix) phone: Allows users to enter any phone number. Automatically formats it as a phone number.

If we enter field value as 9052757414, then it automatically formates it as (905)275-7414

x) Picklist:-

Allows users to select a value from a list we define.

* The Maximum length of the text values is 40 Characters,
* we can give max of 300 Picklist values.

xi) picklist(Multi-select):-

The picklist(Multi-select) field allows users to choose more than one picklist value from a set of pre-defined text values.

* The Maximum length of the text values is 40 characters.
* After saving a record, the data is stored as text along with semi-colons which are used to separate the individual picklist values.

xii) Text:

The Text field allows users to enter any combination of alphanumeric characters.

(OR)

Allows users to enter any combination of letters and numbers.

* The Maximum length of the text value is 255 characters.

xiii) Text Area:-

The Text Area field allows users to enter alphanumeric characters on separate lines.

* The Maximum length of text area value is 255 characters on the separate lines.

* xiv) Text Area (Long):-

The Text Area (Long) provides for the storage of upto 32,768 characters that display on separate lines similar to a text Area field.

* This data type is not available for activities or products on opportunities.

* Every time we press Enter within a long text area field a line break, and a return ~~statement~~ character are added to the text. These two characters count towards the 32,768 character limit.

xv) Text Area (Rich):-

The Text Area (Rich) data type ~~provides~~ allows the users to enter a text value with formatted and add images and links. Upto 32,768 characters we can enter on separate Lines.

* Also allows the users to undo, redo, bold, italicize, underline, strike-out, add a hyperlink, upload or link to an image.

* The maximum size for uploaded images is 1MB and only GIF, JPEG and PNG files types are supported.

xvi) Text (Encrypted): -

* Allows users to enter any Combination of letters and numbers and store them in encrypted form.

* The maximum length of the text value is 255 characters.

* For encrypted text, we can set a maximum length of upto 175 Characters.

xvii) URL:

Allows users to enter any valid website address. When users click on the field value in the detail page, the URL will open in a separate browser window to show the web page.

* The URL field can store upto 255 characters. However, only the first 50 characters are displayed on the record detail pages.

step 2:-

Enter the details.

i) Give the Field Label with meaningful name, Once ~~be~~ we click Tab, then Field Name will be automatically populated from the label. It is used to refer the field in Apex Code, formula fields, and validation rules.

* Force.com appends the Field Name with "__c" to differentiate it from standard fields.

* It's good practice to give a description for the field which describes about the purpose of using that field.

Help Text:-

It is possible to add field level help to a custom field to provide information to users on how to use that field.

If we provide a help text for field, help text will be displayed once the mouse moves over the icon containing the letter "i".

Step 3:-

Establish field-level security

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

step 4:-

Add to page layouts.

* Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts.

* The field will not appear on any pages if we do not select a layout.

* To change the location of the field on the page we will need to customize the page layout.

* Click on "Save" button to create a field success-fully.

* Click on "Save & New" button to create a more custom fields.

Important points about Custom fields:-

* changing the data type of existing custom fields is possible but doing so may cause data loss.

* Deleting a Custom field removes both the data and the field.

* Custom fields are stored for 45 days after deletion.

* Changing the data type of existing custom field can cause data loss in the following situations.
  - i) changing to or from Date or Date/Time
  - ii) Changing to Number from any other type.
  - iii) Changing to percent from any other type
  - iv) Changing to Currency from any other type.
  - v) Changing from picklist(Multi-Select) from any type except Picklist.
  - vi) Changing from Auto Number to any other type.
  - vii) Changing to Auto Number from any type except Text.
  - viii) changing from Text Area(Long) to any type except Email, phone, Text, Text Area, or URL.

* If data is lost, any list view based on the Custom field will be deleted, and assignment and escalation rules may be affected.

Fields:

For Standard Objects,

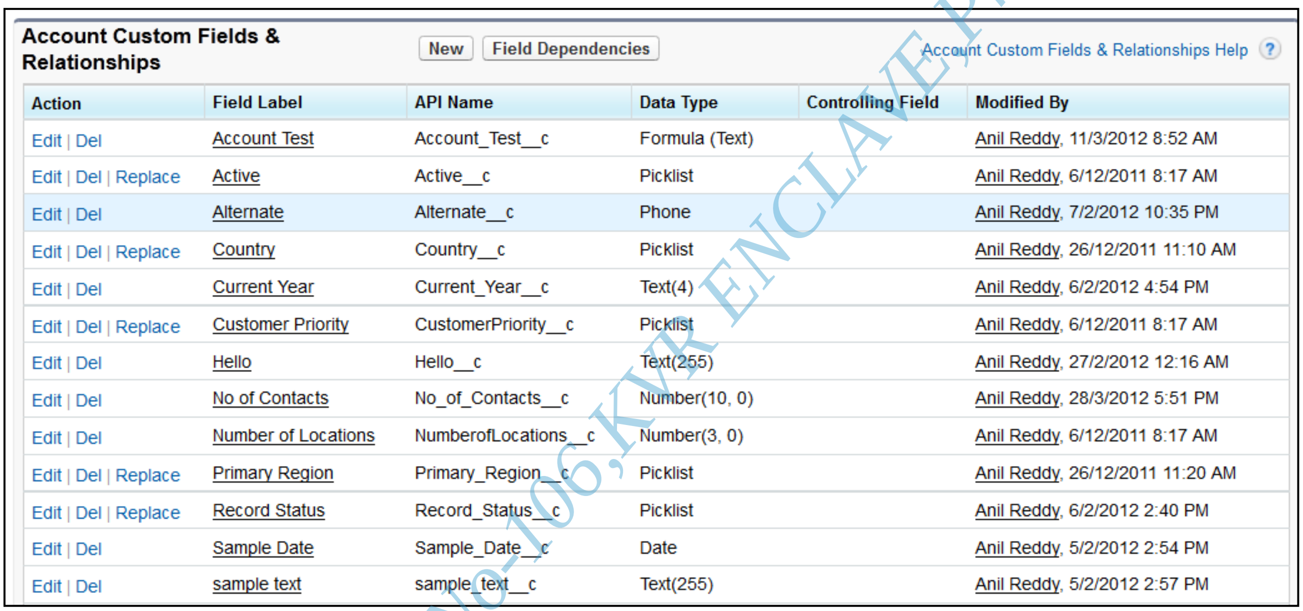
click on Your Name ---> Setup ---> App Setup ---> Select the appropriate object ---> Click on Fields -->

In the Custom Fields & Relationships section, click on the New button

For Custom Objects,

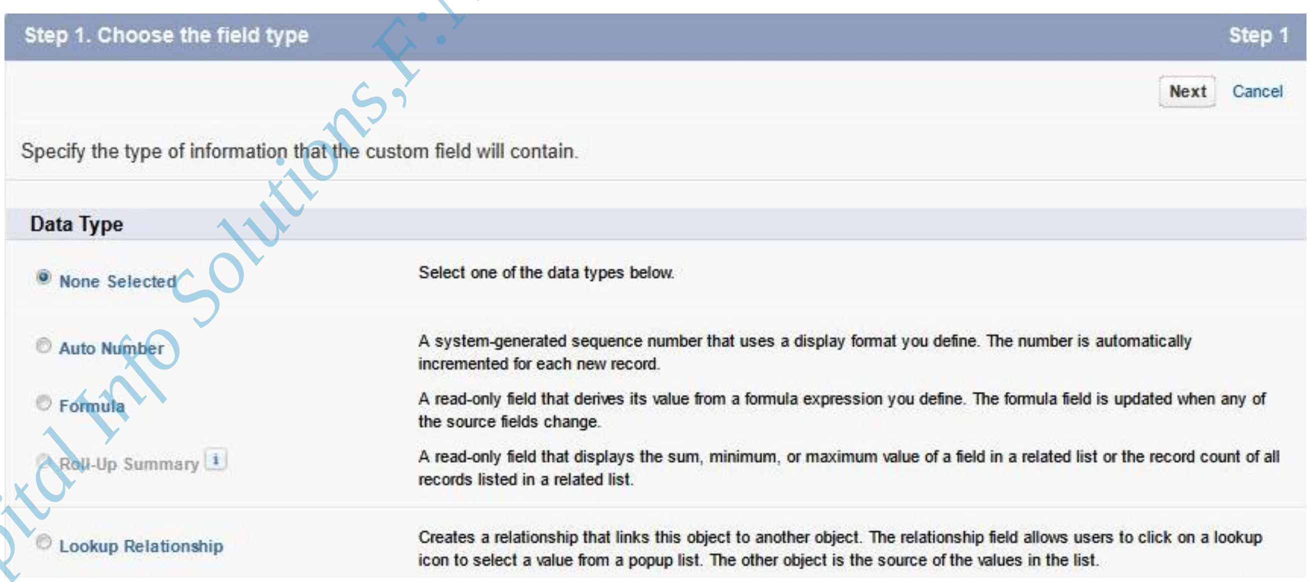
click on Your Name ---> Setup ---> App Setup --->Create ---> Click on Objects --> click on any object name

In the Custom Fields & Relationships section, click on the New button

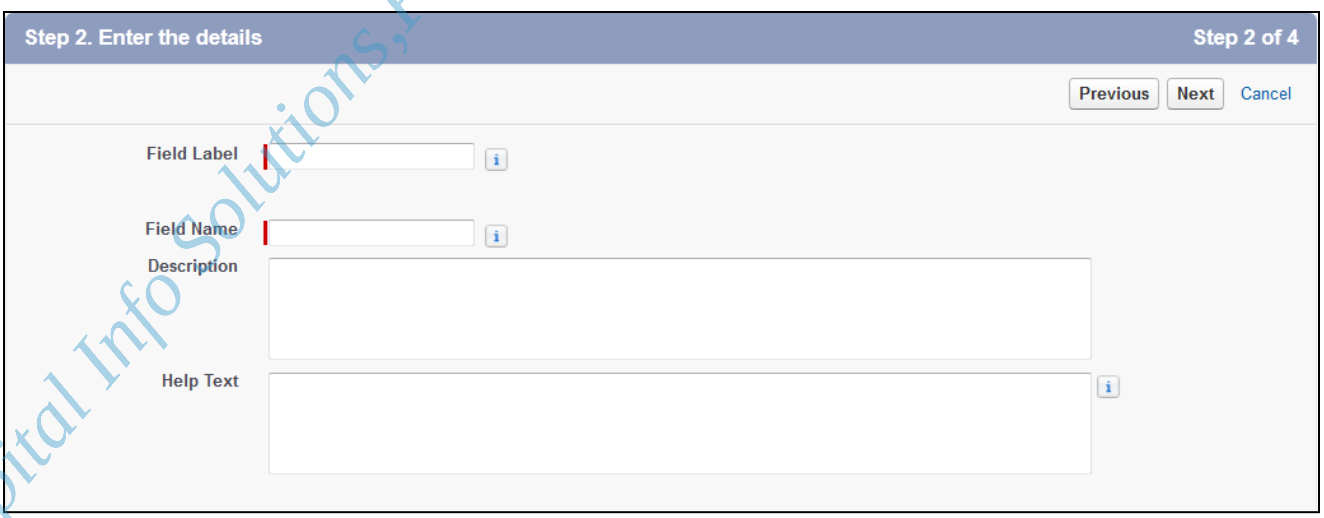


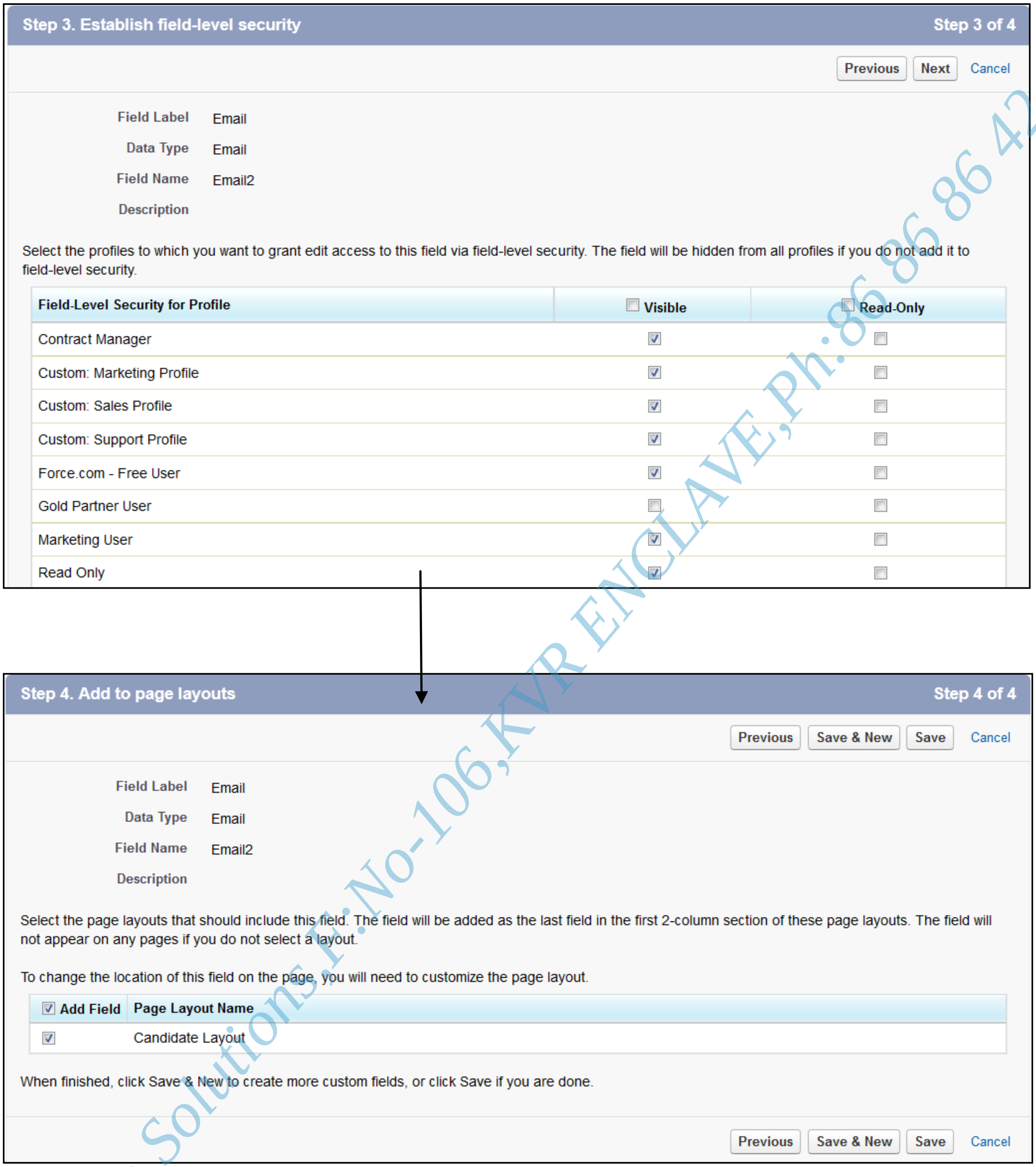
Account Custom Fields & Relationships New | Field Dependencies | Account Custom Fields & Relationships Help

Action	Field Label	API Name	Data Type	Controlling Field	Modified By
Edit | Del	Account Test	Account_Test__c	Formula (Text)		Anil Reddy, 11/3/2012 8:52 AM
Edit | Del | Replace	Active	Active__c	Picklist		Anil Reddy, 6/12/2011 8:17 AM
Edit | Del	Alternate	Alternate__c	Phone		Anil Reddy, 7/2/2012 10:35 PM
Edit | Del | Replace	Country	Country__c	Picklist		Anil Reddy, 26/12/2011 11:10 AM
Edit | Del	Current Year	Current_Year__c	Text(4)		Anil Reddy, 6/2/2012 4:54 PM
Edit | Del | Replace	Customer Priority	CustomerPriority__c	Picklist		Anil Reddy, 6/12/2011 8:17 AM
Edit | Del	Hello	Hello__c	Text(255)		Anil Reddy, 27/2/2012 12:16 AM
Edit | Del	No of Contacts	No_of_Contacts__c	Number(10, 0)		Anil Reddy, 28/3/2012 5:51 PM
Edit | Del	Number of Locations	NumberofLocations__c	Number(3, 0)		Anil Reddy, 6/12/2011 8:17 AM
Edit | Del | Replace	Primary Region	Primary_Region__c	Picklist		Anil Reddy, 26/12/2011 11:20 AM
Edit | Del | Replace	Record Status	Record_Status__c	Picklist		Anil Reddy, 6/2/2012 2:40 PM
Edit | Del	Sample Date	Sample_Date__c	Date		Anil Reddy, 5/2/2012 2:54 PM
Edit | Del	sample text	sample_text__c	Text(255)		Anil Reddy, 5/2/2012 2:57 PM



Master-Detail Relationship	Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where: • The relationship field is required on all detail records. • Once the value of the relationship field has been saved, it cannot be changed. • The ownership and sharing of a detail record are determined by the master record. • When a user deletes the master record, all detail records are deleted. • You can create rollup summary fields on the master record to summarize the detail records. The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
Checkbox	Allows users to select a True (checked) or False (unchecked) value.
Currency	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date	Allows users to enter a date or pick a date from a popup calendar.
Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the popup, that date and the current time are entered into the Date/Time field.
Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Number	Allows users to enter any number. Leading zeros are removed.
Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist	Allows users to select a value from a list you define.
Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
Text	Allows users to enter any combination of letters and numbers.
Text Area	Allows users to enter up to 255 characters on separate lines.
Text Area (Long)	Allows users to enter up to 32,768 characters on separate lines.
Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 32,768 characters on separate lines.
Text (Encrypted)	Allows users to enter any combination of letters and numbers and store them in encrypted form.
URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.




Step 3. Establish field-level security
Step 3 of 4
Previous
Next
Cancel
Field Label Email
Data Type Email
Field Name Email2
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
Visible
Read-Only
Contract Manager
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Force.com - Free User
Gold Partner User
Marketing User
Read Only
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label Email
Data Type Email
Field Name Email2
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
Candidate Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.
Previous
Save & New
Save
Cancel

Object Relationships:-

Object relationships can be set on both standard and custom objects and are used to define how records in one object relates to records in another object.

Ex: Accounts can have a one-to-many relationship with opportunities and these relationships are presented in the application as related lists.

* Salesforce provides the following types of relationships.

  i) Look up Relationship
  ii) Master-Detail Relationship
  iii) Many to Many Relationship
  iv) Hierarchical Relationship.

The differences between the Lookup and Master-Detail relationships are:

Lookup Relationship	Master-Detail Relationship
* We can create as lookup relationships for ~~any~~ both standard and custom objects.	* We can create a Master-Detail relationships for custom objects.
* Lookup relationship can be created if records already exists.	* Master-Detail relationship can't be created if records already exists
* If we deletes the parent record, then childs will not	

be deleted.

* If we delete the parent record then childs will be ~~det~~ deleted automatically.

* Optional

* The ownership and the sharing of a child record are not determined by the parent record.

* Mandatory.

* The ownership and the sharing of a ~~child~~ detail record are determined by the ~~parent~~ Master record.

Steps to test Lookup Relationship:-

* Create a field with the data type as Lookup Relationship on Account object.

* Related to solutions (acts as a parent object)

* After Completing all the steps, the Accounts are the related list to solutions.

* Here we can Create this relationship if account records already exists.

* Now, Delete the solution records, then check the accounts associated with the solution.

* Result will be the account records will not delete.

Steps to test Master-Detail Relationship:-

Note: we can create M-D relationship on the Custom objects only. we can not create on standard objects.

i) Create a field with the data type as Master-Detail on any Custom object (Ex: Customer)

ii) Give related to Cases (Cases will act as Master object)

iii) This field will not be Create when Customer records exists

iv) After ~~saving the~~ Creating the field, the Customers are the related list of Cases.

v) Create a one Case record and also Create Customer records for that Case.

vi) Delete the Case record then check whether the Customer's records is deleted or not.

(Result will be Customer records will be deleted automatically.

Many-to-Many Relationship:-

A many-to-many relationship allows each record of one Object to be linked to multiple records from another object and vice-versa.

* When modeling a many-to-many relationships, we use a "junction object" to connect the two objects we want to relate to each other.

Junction object:-

A Custom object with two master-detail relationships. Using a Custom junction object, we can model a Many-to-Many relationship between two objects.

M : M

Junction object

M:1 (1 M-D)

1:M (1 M-D)

Use the autoNumber data type.

Ex: i) Create a Custom object called "BugCaseAssociation"

ii) For above custom object, create two master-detail relationships.

iii) ~~One master~~ while creating one master-detail relationship choose related to as "Case".

iv) While creating second master-detail relationship, choose related to as "Bug" (Custom object).

v) ~~The~~ while Creating ~~one~~ "BugCaseAssociation" record, there we have to select values for two master-detail fields. From this we say that, we are creating a many-to-many relationships between the "Case" and "Bug" through the Junction object called "BugCaseAssociations" Custom object.

Hierarchical Relationship:-

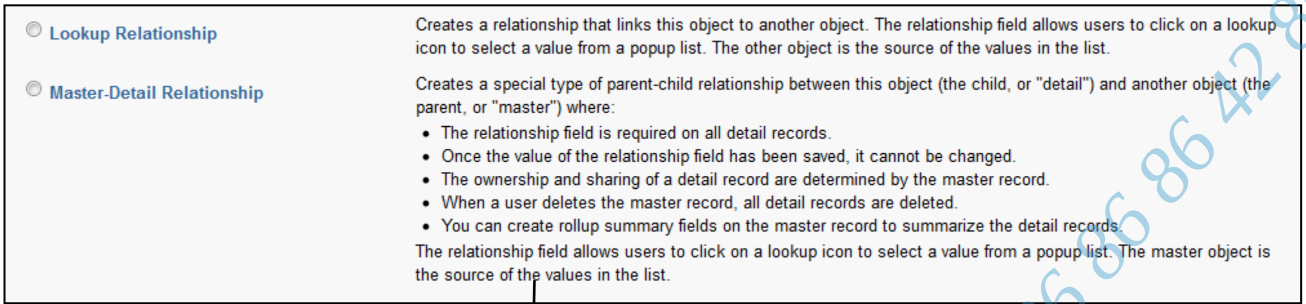
Allows users to click a lookup icon and select another user from a pop-up-list.

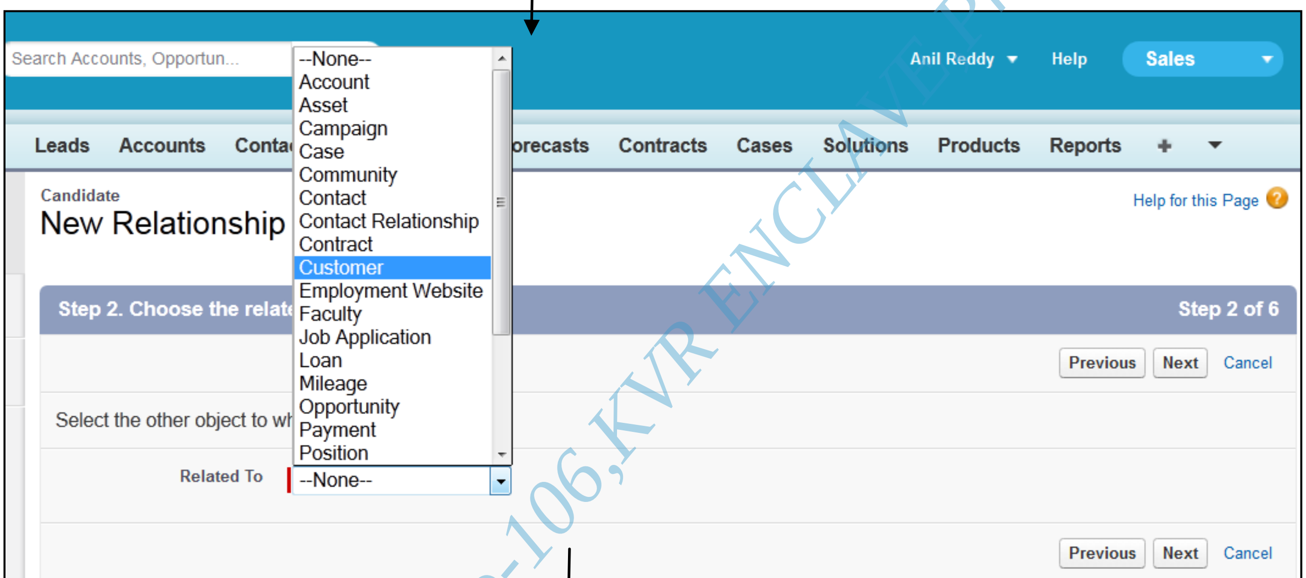
* This type of relationship is a special lookup relationship avail-able only for the user object. It allows ~~users~~ to developers to create a Manager field on the user object to relate another user.

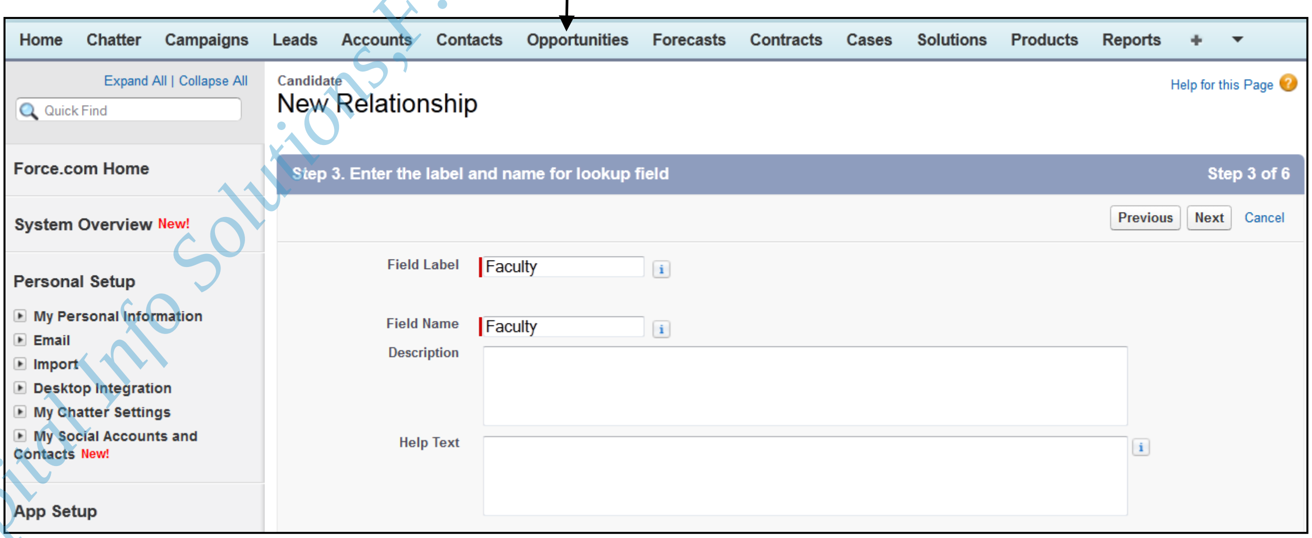
* This relationship will acts as a self relationships.

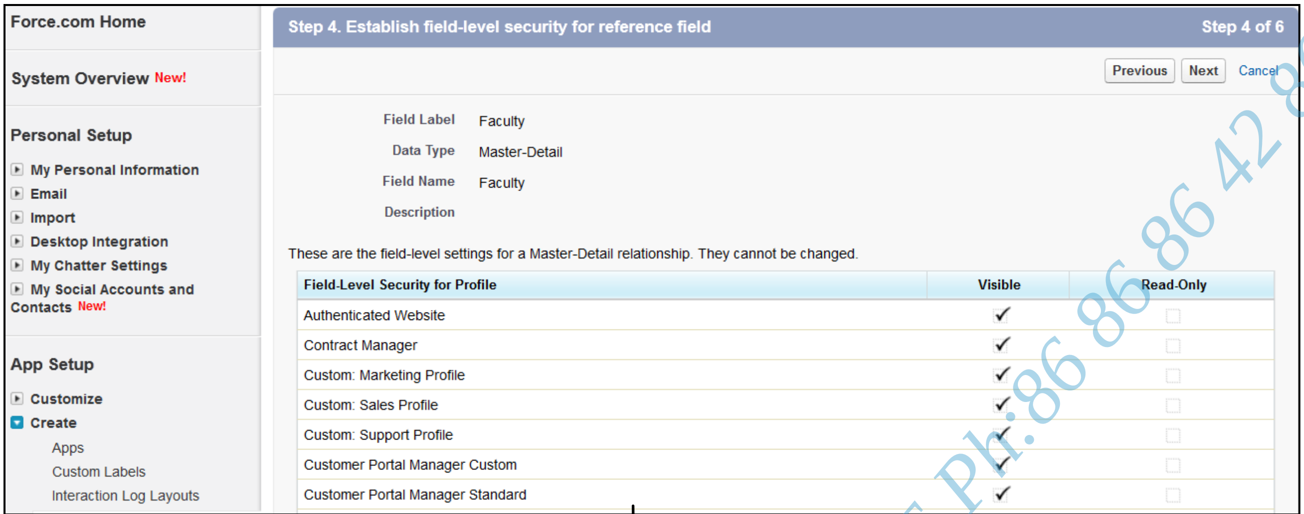
Ex: ~~we~~ If we want to link a Custom object called "Bug" with itself to show how two different bugs are related to the same problem.

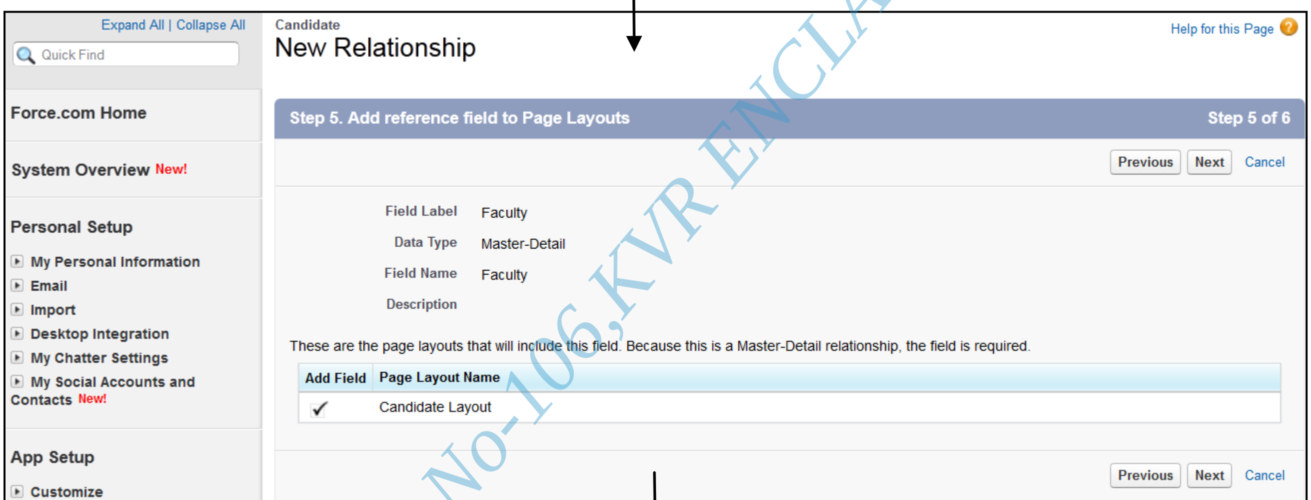
The following screenshots shows the creation of the relationships between the two objects.

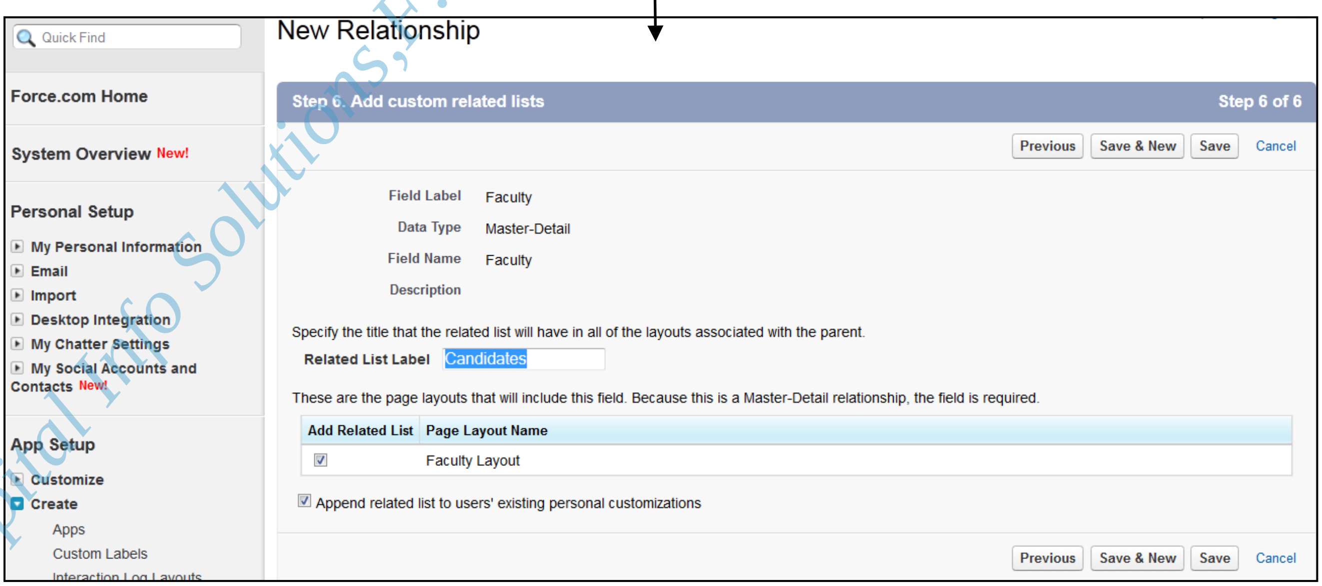







Force.com Home
System Overview New!
Personal Setup
My Personal Information
Email
Import
Desktop Integration
My Chatter Settings
My Social Accounts and Contacts New!
App Setup
Customize
Create
Apps
Custom Labels
Interaction Log Layouts
Step 4. Establish field-level security for reference field
Step 4 of 6
Previous
Next
Cancel
Field Label Faculty
Data Type Master-Detail
Field Name Faculty
Description
These are the field-level settings for a Master-Detail relationship. They cannot be changed.
Field-Level Security for Profile
Visible
Read-Only
Authenticated Website
Contract Manager
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Customer Portal Manager Custom
Customer Portal Manager Standard


Expand All | Collapse All
Quick Find
Force.com Home
System Overview New!
Personal Setup
My Personal Information
Email
Import
Desktop Integration
My Chatter Settings
My Social Accounts and Contacts New!
App Setup
Customize
Candidate
New Relationship
Help for this Page
Step 5. Add reference field to Page Layouts
Step 5 of 6
Previous
Next
Cancel
Field Label Faculty
Data Type Master-Detail
Field Name Faculty
Description
These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.
Add Field
Page Layout Name
Candidate Layout
Previous
Next
Cancel


Quick Find
Force.com Home
System Overview New!
Personal Setup
My Personal Information
Email
Import
Desktop Integration
My Chatter Settings
My Social Accounts and Contacts New!
App Setup
Customize
Create
Apps
Custom Labels
Interaction Log Layouts
New Relationship
Step 6. Add custom related lists
Step 6 of 6
Previous
Save & New
Save
Cancel
Field Label Faculty
Data Type Master-Detail
Field Name Faculty
Description
Specify the title that the related list will have in all of the layouts associated with the parent.
Related List Label Candidates
These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.
Add Related List
Page Layout Name
Faculty Layout
Append related list to users' existing personal customizations
Previous
Save & New
Save
Cancel

Formula Fields:-

* A read-only field that derives its value from a formula expression we define. The formula field is updated when any of the source fields change.

* Supported on standarda and custom objects

* Can reference standard, custom or other formula fields.

* Can reference fields on related objects. → These reference fields are called merge fields

* Number of characters we can enter is 3900 (space will ta one character).

* The formula compile capacity is 4000 characters.

Building Formulas:-

Consider the following steps to create a formula field.

i) Choose the formula data type

ii) choose the data type for the formula based on the output of the calculation

* Enter the number of decimal places for currency, number or percent data types.

* A formula result can be of only 6 types

Currency → calculates a dollar or other currency amount and automatically format the field as a currency amount.

Date → calculate a date.

Date/Time → Calculate a date/time, for example by adding a number of hours or days to another date/time.

Number → Calculate a numeric value.

percent → Calculate a percent and automatically add the percent sign to the number.

Text → Create a text string, for example by Concatenating other text fields.

iii) click "Next" to display the formula Creation screen.

Basic formula:-

Select the Simple Formula tab, choose the field type in the select Field Type drop-down list, and choose one of the fields listed in the Insert Field drop-down list.

To insert an operator, choose the appropriate operator icon from the 'Insert operator' drop-down list.

Advanced Formula:-

The basic formula feature is quite restricted and we can create more Complicated formulas ~~whic~~ by selecting the Advanced Formula tab.

Within this tab, click on "Insert Field", choose a field, then click on 'Insert'.

* Click check Syntax to check our formula for Errors.

* formula fields *

1) Date & Time functions:-

Date (YYYY, MM, DD):- used to display Date in month, Day, year format

Date value:- used to display the date on screen the input can be Expression (or) Text.

Date/Time:- used to display Date/time stamp on the screen & the input can be field, Expression, text

Day:- Extracts day from date field

month: Extracts month from date field

year: Extracts year from date field

Today(): will display present date.

Now(): it will display present date with time.

2) Text functions:-

Begins:-

Syntax:- Begins(text, compare_text)

checks if text begins with specified character and returns True if it matches otherwise returns

Contains:-

Syntax: contains(text, compare-text)

checks if text contains specified characters, and returns TRUE if it does. otherwise, returns FALSE

Find:-

Syntax:- find(search-text, [start_num])

Returns the position of the search-text string in text.

includes:-

Syntax:- includes(multiselect-picklist-field, text-literal)

Determines if any value selected in a multi-select picklist field equals a text literal you specify

ISPICKVAL:-

Syntax:- ispickval(picklist-field, text-literal)

checks whether the value of a picklist field is equal to a string literal.

LEFT:-

Syntax:- LEFT(text, number-chars)

Returns the specified number of characters from the start of a string from left side.

RIGHT:

Syntax:- RIGHT(text, number-chars)

Returns the specified number of characters from the start of a string from right side

MID:-

Syntax:- MID(text, start_num, num_chars)

Returns the characters from the middle of a text string mentioned no of characters from the starting position.

LEN:-

Syntax: LEN(text)

Returns the no of characters in a text string.

LOWER:-

Syntax: LOWER(text)

Converts all letters in the value to lower case

UPPER:-

Syntax: UPPER(text)

Converts all letters in the value to upper case.

LPAD:-

Syntax: LPAD(text, Padding_length, Pad_string)

Pad the left side of the value with spaces or the optional Pad string

RPAD:-

Syntax: RPAD (text, Padding_length, Pad_string).

Pad the Right side of the value with spaces or the optional Pad string.

Substitute:-

Syntax:- Substitute(text, old-text, new-text)

Substitutes new-text for old-text in a text string.

Text:-

Syntax: Text(Value)

Converts a value to text using standard display format.

TRIM:

Syntax: TRIM(text)

Removes all spaces from a text string Expect for single spaces between words.

Math functions:-

ABS:-

Syntax: ABS(number)

Returns the absolute value of a number, a number without sign.

CEILING:-

Syntax: CEILING(number)

Rounds a number to the nearest integer

EXP:

Syntax: Exp(number)

Returns 'E' raised to the power of a given number

FLOOR:-

Syntax: FLOOR(number)

· Rounds a number down, towards zero to the nearest integer

ISBlank:-

Syntax:- isblank(Expression)

checks whether an Expression is blank and returns TRUE (or) FALSE.

LN:-

Syntax. LN(number)

Returns the natural logarithm of a number

LOG:

Syntax: LOG(number)

Returns the base 10 log of 'n'

Max:-

Max(num1, num2, num3 ...)

Returns the greatest of all numbers

MIN:-

MIN(num1, num2, num3 ...)

Returns the least of all numbers

Round:-

Syntax: Round(number, num-digits)

Rounds a number to a specified number of digits

SQRT:

Syntax: SQRT(number)

Returns the positive square root of a number.

Logical functions:-

AND:-

Syntax:- AND(logic1, logic2, ----)

if all logics are true it will return true otherwise returns false.

OR:-

Syntax: OR(logic1, logic2, ----)

if any one logic is true it will return true, if all logics are false it will return false.

CASE:

Syntax: CASE(Expression,
value1, result1,
value2, result2,
value3, results---
Else result)

checks an expression against a series of values if the expression compares equal to any value. the corresponding result is returned. if it is not equal to any of the values, the else-result is returned.

IF:-

Syntax: IF(logical-test, value-if-True, valu-if-false)

checks whether a condition is True, returns one value if True and another value false.

ISNULL:-

Syntax:- ISNULL(Expression)

Checks whether an expression is null and returns TRUE(or) FALSE.

ISNUMBER:-

Syntax: ISNUMBER(Text)

Returns TRUE if the text value is a number, otherwise it returns false

NOT:-

Syntax:- NOT(logical)

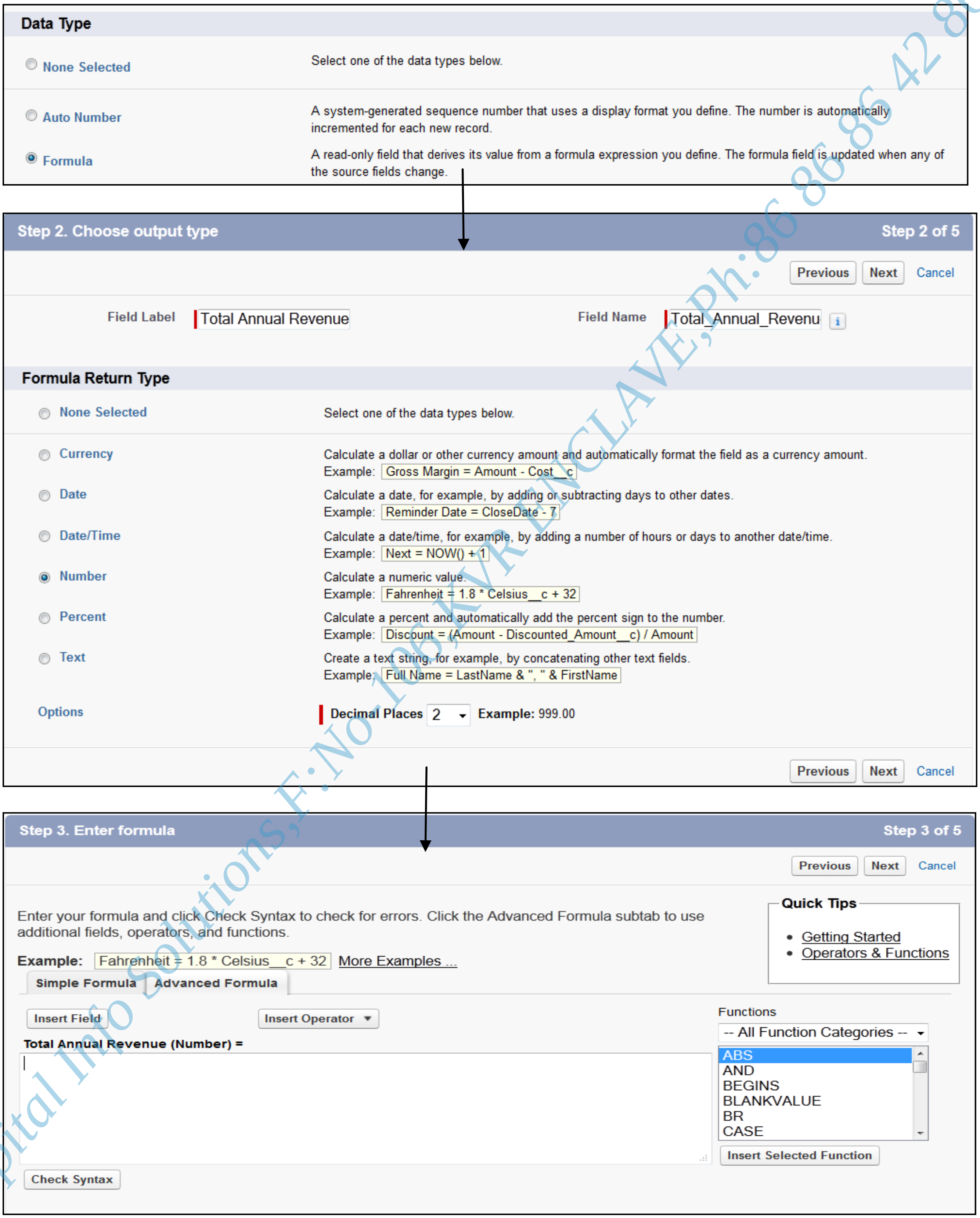
changes false to TRUE (or) TRUE to false

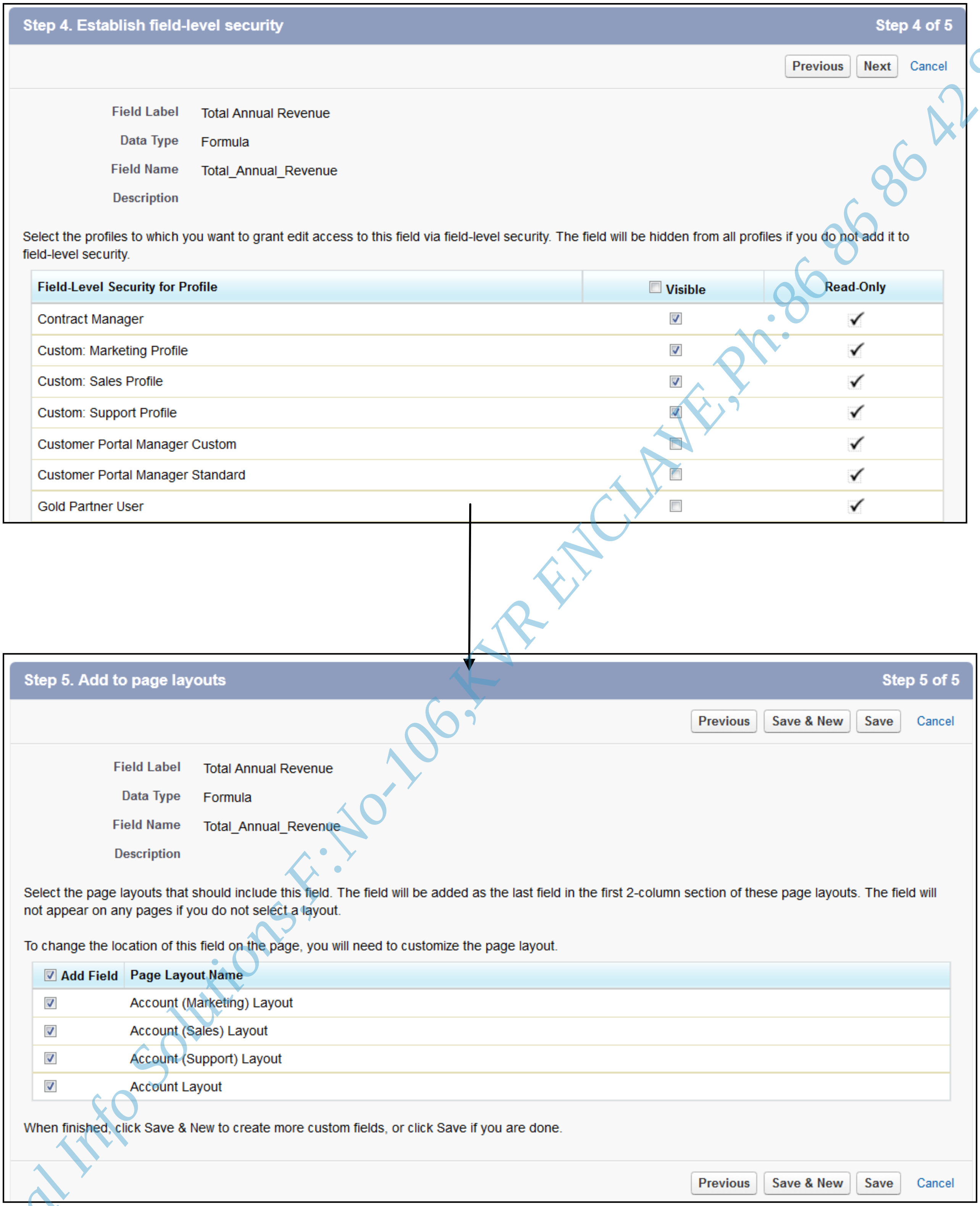
NULL VALUE:-

Syntax: nullvalue(Expression, Substitute_Expression)

checks whether Expression is Null and returns Substitute_Expression if it is null. if Expression is not null returns the original Expression value.

Formula Fields:




Step 4. Establish field-level security
Step 4 of 5
Previous
Next
Cancel
Field Label
Total Annual Revenue
Data Type
Formula
Field Name
Total_Annual_Revenue
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
Visible
Read-Only
Contract Manager
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Customer Portal Manager Custom
Customer Portal Manager Standard
Gold Partner User
Step 5. Add to page layouts
Step 5 of 5
Previous
Save & New
Save
Cancel
Field Label
Total Annual Revenue
Data Type
Formula
Field Name
Total_Annual_Revenue
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
Account (Marketing) Layout
Account (Sales) Layout
Account (Support) Layout
Account Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.
Previous
Save & New
Save
Cancel

Roll-up Summary Field:-

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.

* This is only enable for Master-Detail Relationship that to for Master object. —why

Ex: There are two objects X and Y. and we ~~ba~~ must have Master-Detail Relationship b/w X and Y inorder to Create the Roll-up Summary Field.

Suppose lets take X → Master
Y → child

* The Roll-up Summary data type will be enable on only X (Master) object. This is because we can create Roll-up Summary field on Master-object.

* We need to select Summarized Object (child object)

* There is an option to include all records in the roll-up or just records that meet certain criteria.

* Now, easy way of defining a Roll-up summary field is, it is used to automatically display the summarized values of the related records. This can be a record count of related records or a calculation of the sum, minimum, or maximum value of the related records. (or)

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→ A field that displays the detail object records data

Steps for Creating a Roll-Up Summary field:-

Step 1: Choose the Roll-up summary field type on any Master object and click on "Next" button

step 2: Enter a field label and any other attributes. click "Next".

step 3: Select the object on the detail side of a Master-Detail relationship. This object contains the records we want to summarize.

* After that select the Roll-up type.

↓

This Roll-up type determines the calculation to be performed on the child records and the field of the child object to perform it on.

Types of Roll-up type:-

COUNT :- This function gives the total number of related records.

~~Ex:~~

SUM:- This function displays the total values in the field we select in the "Field to Aggregate" option. Only Number, Currency and percent fields are available.

MIN :- This function displays the lowest value of the field we select in the "Field to Aggregate" option for all directly related records. only Number, Currency, percent, date and date/time fields are available.

MAX :- This function displays the highest value of the field we select in the Fields to Aggregate option for all directly -related records. only number, currency, percent, date, and date/time fields are available.

* Enter filter criteria if we want a selected group of records in ~~Summary~~ Summary calculation.

* click on "Next".

* Step 4:

Set the Field-level Security to determine whether the field should be visible for specific profiles and click "Next".

Step 5:

choose the page layouts that display the field. This ~~field~~ field is added as the last field in the first two-column section on the page layout.

* click "Save" to finish (or) "Save & New" to create more custom fields.

Note: Rollup Summary fields will not be visible on Edit page but it will be displayed on Detail page because it is read-only field.

Example for Roll-up Summary field:-

* Create the object called "Trainings".
* Create the object called "students".
* Create a "Master-Detail" Relationship on the students object and Related to Trainings.
* After creation of all above, The students are the related list of Trainings. (For 1 training record, we can create many students).
* Create the "student Fee" Field on the student object with a datatype called "Currency".
* Now Create a roll-up summary field on the Training object

Steps to be followed:-

Step 1:
1. Select the "Roll-up Summary" data-type.

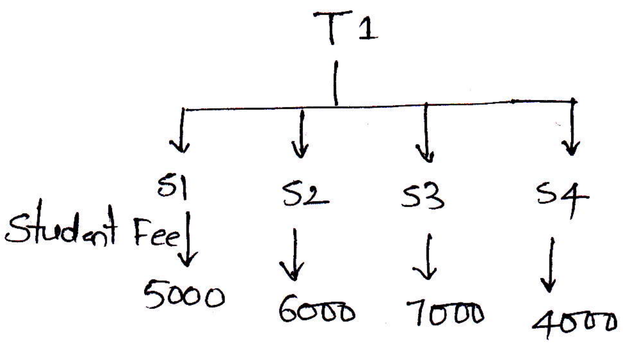
Step 2: Enter the ~~de~~ Field Label as "Total Number of students".

Step 3: select the function ~~as~~ "Count" and Summarized object as "Students". and click on "Next".

Step 4: Establish field-level security.

Step 5: Add to page Layouts.

Result: In the Trainings detail page, the total Count of students will get it on 'Total Number of students' field and it is read only.



Field Label: Total Fee.

* Create a Roll up Summary field on the trainings object with a Summarized object as "students" and function "Sum". and select "student Fee" as field to aggregate.

(Result: The sum of student Fee of all the students for that training will display on Training's detail page = 22000

* Create a Roll up Summary field on the trainging's object as above and select the function called "Max"

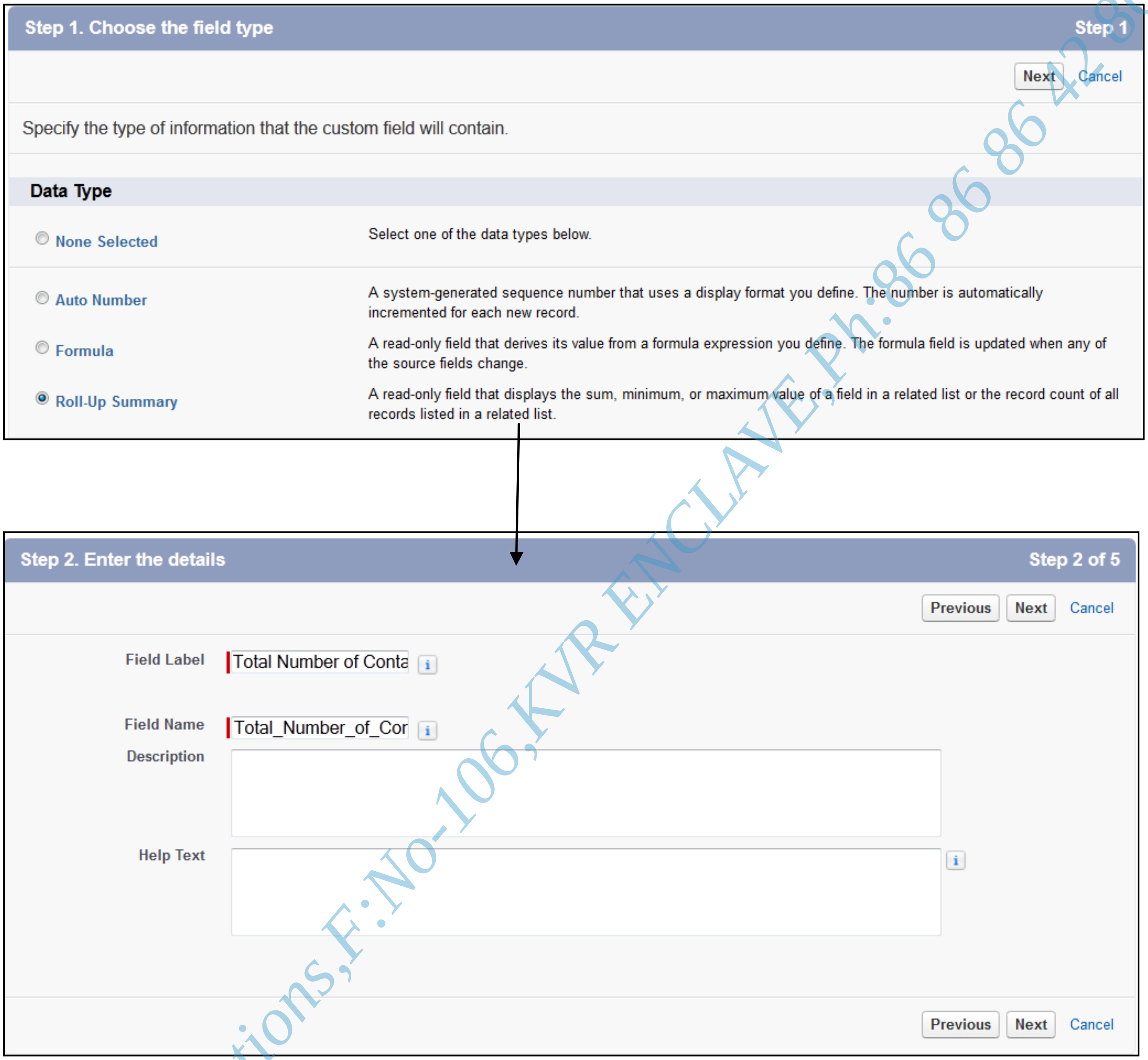
(Result: The Maximum Fee among all the students for that training will display on Training's detail page = 7000

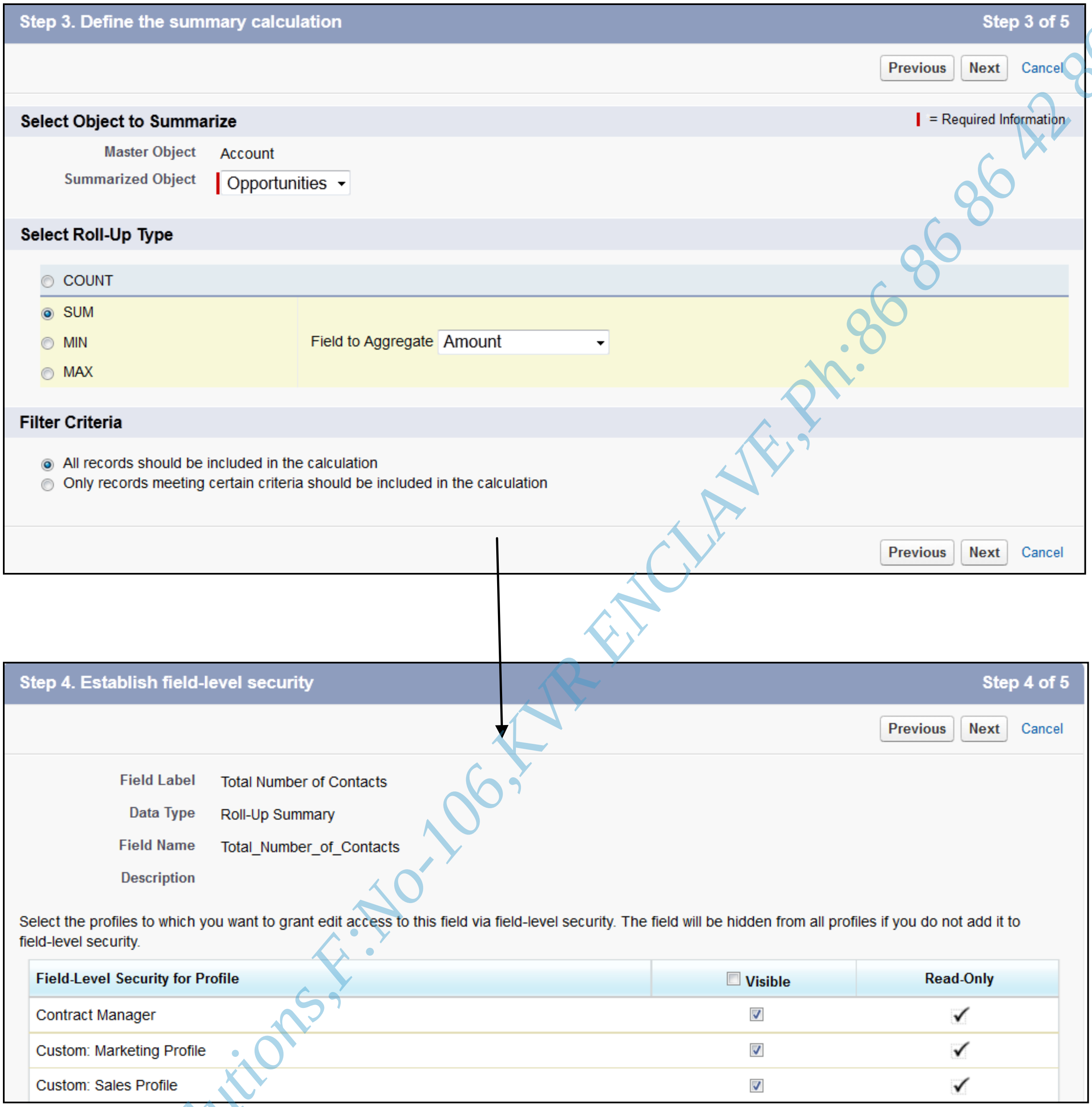
* Create a Roll up summary field called "Minimum Fee" on the trainings object as above and select the function called "MIN".

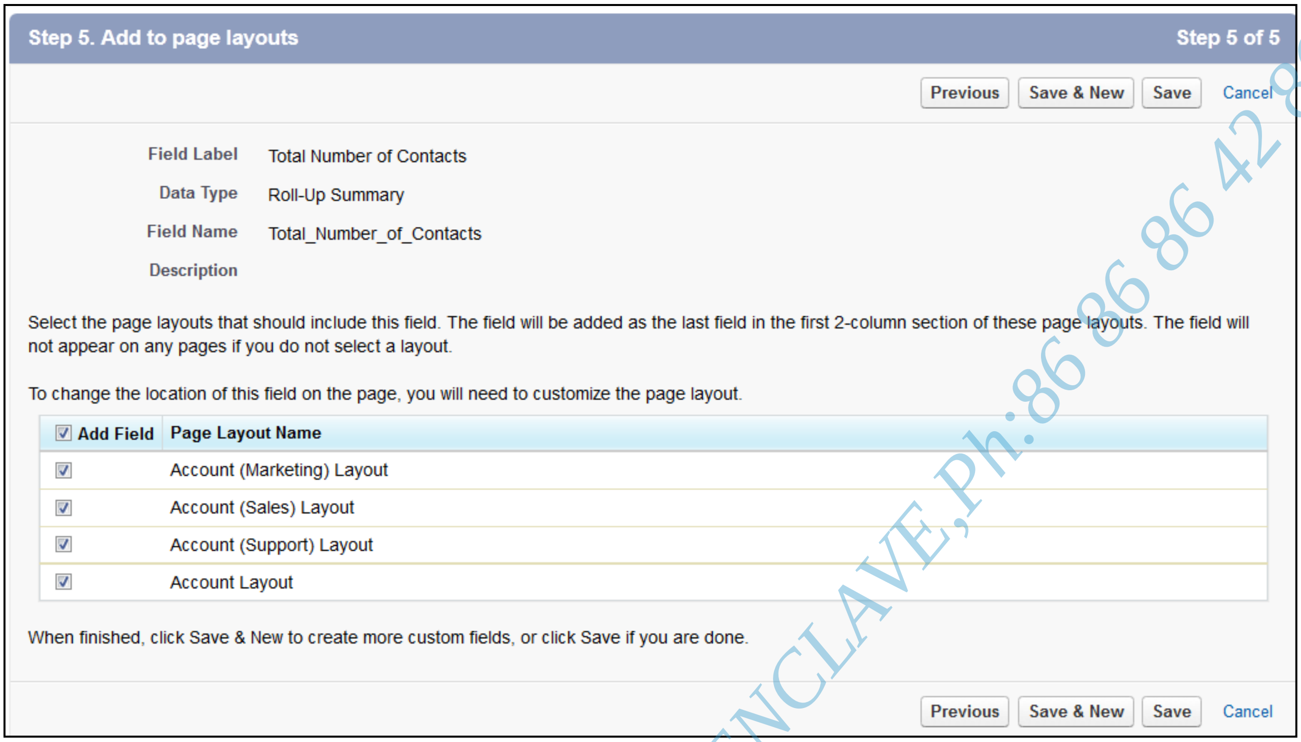
(Result: The minimum Fee among all the students for training will display in "Minimum Fee" field on Training's detail page

= 4000.

Rollup Summary Fields:




Step 3. Define the summary calculation
Step 3 of 5
Previous
Next
Cancel
Select Object to Summarize
= Required Information
Master Object
Account
Summarized Object
Opportunities
Select Roll-Up Type
COUNT
SUM
MIN
MAX
Field to Aggregate
Amount
Filter Criteria
All records should be included in the calculation
Only records meeting certain criteria should be included in the calculation
Previous
Next
Cancel
Step 4. Establish field-level security
Step 4 of 5
Previous
Next
Cancel
Field Label
Total Number of Contacts
Data Type
Roll-Up Summary
Field Name
Total_Number_of_Contacts
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
Visible
Read-Only
Contract Manager
Custom: Marketing Profile
Custom: Sales Profile


Step 5. Add to page layouts
Step 5 of 5
Previous
Save & New
Save
Cancel
Field Label
Total Number of Contacts
Data Type
Roll-Up Summary
Field Name
Total_Number_of_Contacts
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
Account (Marketing) Layout
Account (Sales) Layout
Account (Support) Layout
Account Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.
Previous
Save & New
Save
Cancel

Dependent picklists:-

* The value choosen in the controlling field affects the values available in the dependent field.

* A dependent field works in conjunction with a controlling field to filter its values.

* Custom picklist fields can be controlling or dependent

* standard picklists fields can only be controlling.

* we can set default value for controlling field but not for dependent picklists.

* Multi-select picklists can be dependent picklist but not controlling field.

* Make sure controlling field exist on any page layout that contains their associated dependent picklist, when the controlling field is not on the same page layout, the dependent picklist shows no available values.

If a dependent picklist is required and no values are available for it based on the controlling field value, users can save the record without entering a value. The record is saved with no value for that field.

* The maximum number of values allowed in a controlling field is 300.

* Field Level Security settings for a controlling field and dependent picklist are completely dependent. Remember to hide

Controlling fields whenever its correlating dependent picklists is hidden.

~~Example~~: path for Creating a dependent picklists:-

* For standard objects, click Your Name

↓

setup

↓

Customize

↓

Select the appropriate object

↓

click on "Fields".

Go to Custom fields & Relationships and click on "Field Dependencies".

↓

click on 'New' button

↓

Select Controlling Field and Dependent field and click on "Continue" button

For Custom Objects, click Your Name

↓

setup → Create → objects ⇒ ~~and~~

↓

select one of the Custom object

↓

Go to 'Custom fields' & Relationships' and click on "Field Dependencies' button.

Example:

* Create the picklist field called "~~Country~~ University" with the following values on Account object.

  OU
  JNTU
  KU
  Nagarjuna

* Create the picklist field called "College" with the following values on Account object

  CBIT, VASAVI, Deccan, MGIT, JBIT, SSIT, VBIT,
  SRT, Vivekananda Eng. College, SVS.

* Now, Create the dependent picklists between "University" and "College".

  University → Controlling field
  College → dependent field.

  If we select OU, Then only few values (CBIT, VASAVI, MGIT) we can select from dependent field.

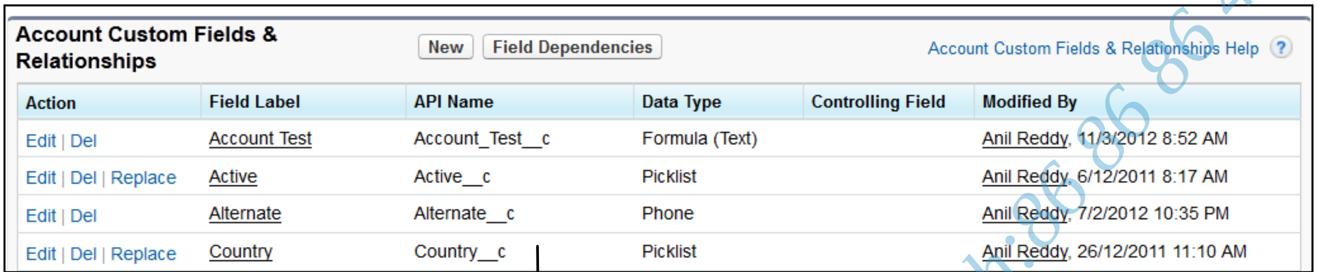
OU	JNTU	KU	Nagarjuna
CBIT	JBIT	SRT	SVS.
VASAVI	SSIT	VGC	
MGIT	VBIT		

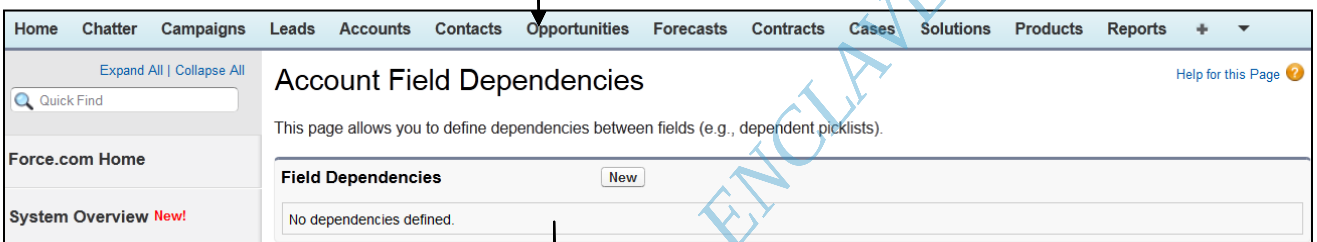
* Here we can set the default value for "University" picklist field but not for "College" picklist field.

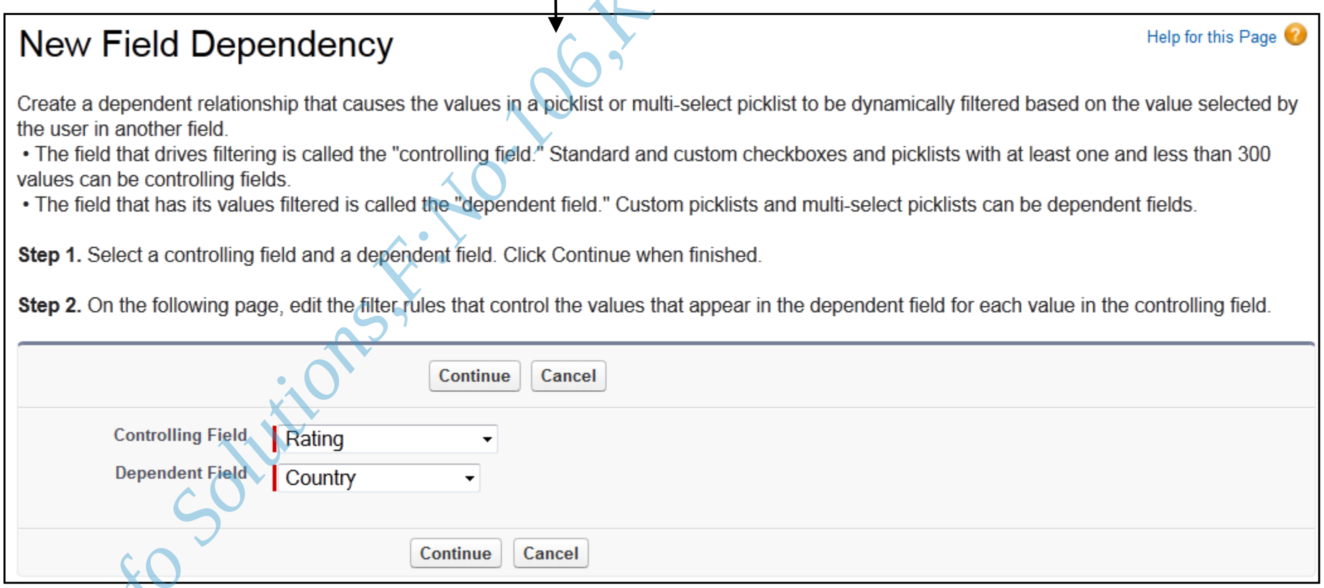
* The maximum number of values allowed in a Controlling field (University) is 300.

Dependent Fields:

Go to the Custom Fields & Relationships section for standard object and custom object. Click on "Field Dependencies" button







Edit Field Dependency

Help for this Page

Save | Cancel | Preview

Controlling Field: Rating

Dependent Field: Country

▼ Instructions

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

Legend

Excluded Value

Included Value

Click button to include or exclude selected values from the dependent picklist:

Include Values | Exclude Values

Showing Columns: 1 - 3 (of 3) < Previous | Next > View All ▸ Go to

Rating:	Hot	Warm	Cold
Country:	**United kingdom**	*United kingdom*	*United kingdom*
	Saudi arabia	**Saudi arabia**	*Saudi arabia*
	Qatar	**Qatar**	**Qatar**
	United states	*United states*	*United states*
	Singapore	*Singapore*	*Singapore*
	United arab emirates	**United arab emirates**	*United arab emirates*
	Canada	*Canada*	**Canada**
	Bahrain	*Bahrain*	*Bahrain*
	India	*India*	*India*
	Australia	*Australia*	**Australia**
	Brazil	*Brazil*	**Brazil**
	Oman	*Oman*	*Oman*

Showing Columns: 1 - 3 (of 3) < Previous | Next > View All

Click button to include or exclude selected values from the dependent picklist:

Include Values | Exclude Values

Save | Cancel | Preview

Account Field Dependencies

Help for this Page

This page allows you to define dependencies between fields (e.g., dependent picklists).

Field Dependencies New

Action	Controlling Field	Dependent Field	Modified By
Edit | Del	Rating	Country	Anil Reddy, 20/5/2012 12:21 PM

Page Layouts:-

1. page layouts determines how detail and edit pages are organized (field Locations)

2. page section Customizations.

3. And which fields, related Lists and Custom links are in a user's View.

* A page Layout controls the position and organization of the fields and related Lists that are visible to users when viewing a record.
* Page Layouts also help us to Control the visibility and editability of the fields on a record.
* we can set fields as read-only or hidden, and we can also control which fields require users to enter a value and which don't.
* page Layouts should never be used to restrict access to sensitive data that a user shouldn't view or edit. Although we can hide a field from a page layouts, users can still access that field through other parts of the App, such as in Reports or via the API.
* Control the which standard and Custom buttons display on detail pages and related lists.

Creating a page Layout:-

To create a new page layout or modify a page layout, follow the path, Your Name → setup → App setup → Customize, select the appropriate object and click page Layouts.

↳ In the Page Layouts page, click on "New" button and

↳ Give the existing page layout to clone (optional)

↳ Type a name for the new layout

↳ click "save".

* The following path is used to modifying a page Lay-out.

↳ click on the page Layouts

↳ click on "Edit" link

* In the page Layout Editor,

SAVE → button is used to save the page layout after changes made (Return page is page Layout page)

Quick Save → button is used to the save the page layout after changes made. (Return page is same page).

SAVE AS → This is used to cloning the page Layout.

Layout Properties → used for changing the name of the page layout.

Customizing Related Lists:-

The Customizing related lists includes the Customizing buttons, Columns displayed, column order, and record sort order of related lists on record detail pages in Salesforce.

* Double click a related list on the layout to edit it. To Customize the fields that display in related list:

1. Select one or more fields and use the arrows to add or remove the fields to the related list columns on the page layout, and to define the order in which the related list columns display. we can include upto 10 fields per related list.

2. Select the field from the Sort By drop-down list to sort the items in the related list, which will be displayed in ascending order unless we select Desending.

3. Look up fields are not available for display on their Corresponding related list. For example, the case lookup field on an account page layout is not available when editing the case related list.

* To Customize which standard buttons display in the related list, select or deselect the checkbox next to any standard button name.

To Customize which Custom buttons display in related list:

* To add or remove a custom button, select the button and click Add or Remove.
* Sort Custom buttons by selecting them and clicking Up or Down.

Record Types:-

Record Types allows us to provide different set of object picklists, different Page layouts and custom business Processes to specific users based on their profile.

For Example:

1. Create record types for Opportunities to differentiate ~~sales~~ internal sales deals from field sales deals and show different fields and picklist values.
2. Create record types for leads to display different page layouts for tele-sales leads versus internal sales prospecting functions.

* The record type called Master is always set for every object ~~and~~ and it is not listed under the record types list and it can be assigned as a record type for a profile provide it is the only assigned record type for that profile.

Creating Record Types:

To Create record types on a standard object.

click Your Name → setup → Customize → then select an object → click Record Types.

↳ click "New" button.

step1: Enter the details.

* choose Master from the Existing Record Type drop down list to copy all available picklist values or choose an existing record type to clone its picklist values.

* Enter a "Record Type Label" that's unique within the object.

* Enter a Record Type Name". This name can contain only underscores and alphanumeric characters and must be unique in organization.

* For Opportunity, Case, Lead and solution record Types. Select a business process to associate with a record type.

* Enter a description.

* select Active checkbox to activate the record type.

* Select "Enable for profile" next to a profile to make the record types available to users with that profile. Select the checkbox in the header row to enable it for all profiles.

* Select "Make Default" to make it the default record type for users of that profile. select the checkbox in the header row to make it the default for all profiles.

* click "Next" button

Step 2:

In the step 2; choose a page layout option to determine what page layout display for records with this record type.

* To apply a single page layout for all profiles, select "Apply one layout to all profiles" and choose the page layout from the drop-down list.

* To apply different page layouts based on user profile, select "Apply a different layout for each profile" and choose a page layout for each profile.

* click "Save" button to edit the values of the standard and custom picklists available for the record type.

* click "Save and New" to create another record type.

Editing picklists for Record Types:-

To customize the values in record types picklists.

1. Select the record type and click "Edit" next to one of the picklist fields to customize the values included for the record type.

2. Add any value from the Available Values box or remove any values from the Selected Values box. Users will be able to choose from the list of selected values when creating and editing records.

3. Optionally, choose a default picklist value.

4. click "Save" button.

Assigning Record Types to Profiles:-

* After creating record types and including picklist values, add record types to user profiles and assign a default record type for each profile. when we add a record type to a profile, users with that profile can assign that record type to records they Create or edit.

Procedure:-

1. click Your Name → Setup → Manage Users → Profiles.
2. Select a profile. The Record Types available for that profiles are listed in the Record Type Settings section.
3. click "Edit" next to the appropriate type of record.
4. Select a record type from the Available Record Types list and add it to the selected Record Types list and make it available to users with that profile.

"Master" is a system-generated record type that's used when a record has no Custom record types associated with it. When "Master" is assigned, user's can't set a record type to a record, such as during record creation.

5. From the "Default" drop-down list, choose a default record type.
6. click "Save" button.

Page Layout Assignment:-

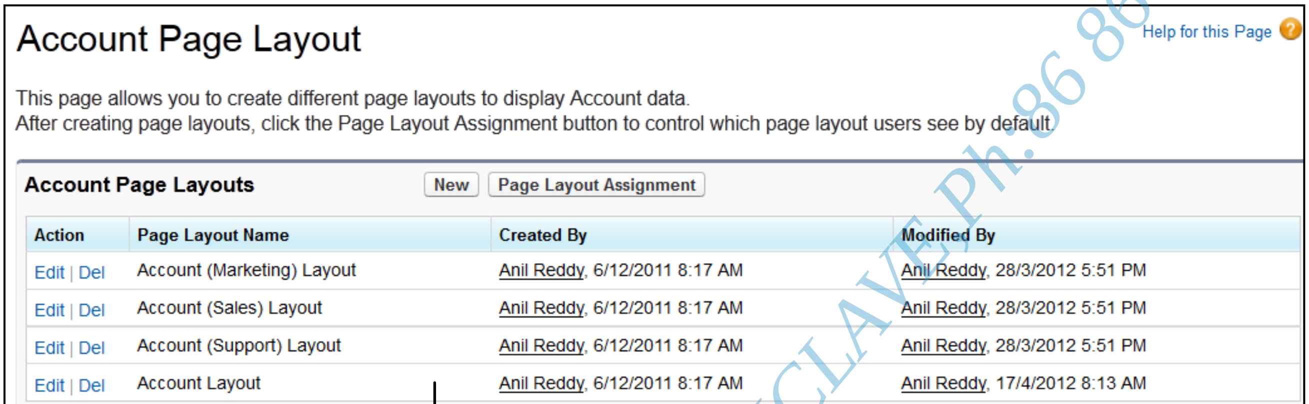
The following procedure gives the information about the assigning Page Layouts from a Customize page layout or Record Type page.

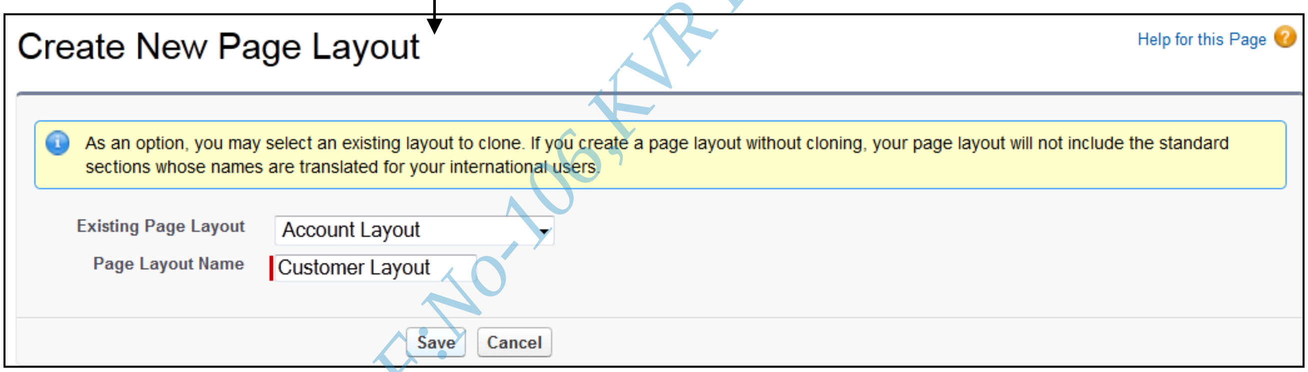
1. click YourName → setup → Customize → select the appro-priate object → click on Page Layouts or Record Types.
2. In the page layout or record ~~page~~ type list page, click page Layout Assignment.
3. click "Edit Assignment".
4. when selecting Page Layout Assignments
   * click a Cell, Column or row heading to select all the table cells in that column or row.
   * Press SHIFT + click to select multiple adjacent table cells, columns or rows.
   * click any Cell and drag to select a range of cells.
   * click "Next" or "Prev" to view another set of record types.
5. Select the page layout Assignments are highlighted. Page Layout Assignments we change are italicized until we save our changes.
6. If necessary, select another page layout to assign from the "Page Layout to Use" drop-down list and repeat the previous step for the new page layout.
7. click "Save" button.

Page Layouts:

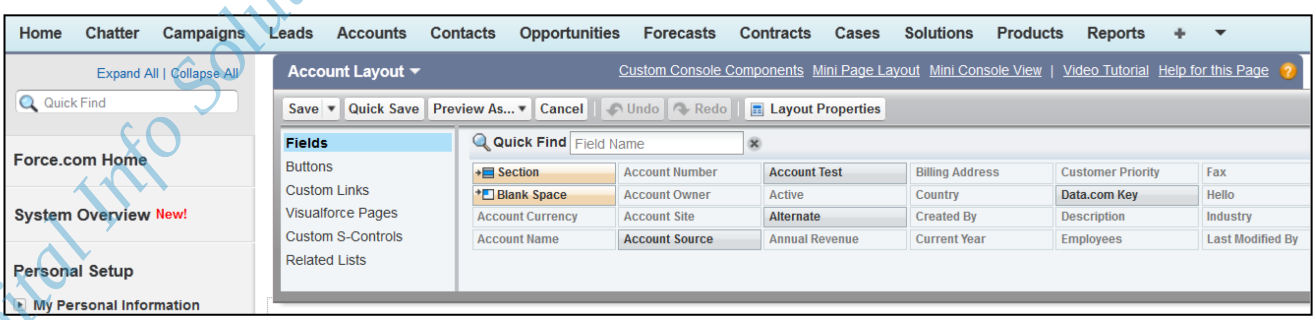
For Standard Objects, Click Your Name --> Setup --> App Setup --> Customize --> Select an appropriate object --> Click on "Page Layouts" ---> Click on "New" button

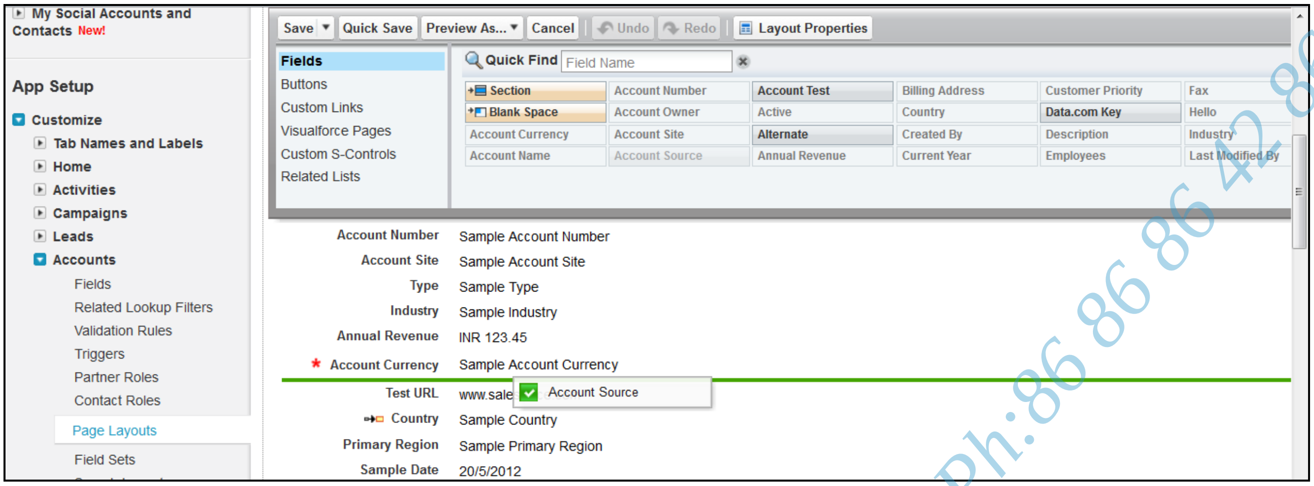
For Custom Objects, Click Your Name --> Setup --> App Setup --> Create --> Objects --> Click on any object name--> Go to the "Page Layouts" section ---> Click on "New" button

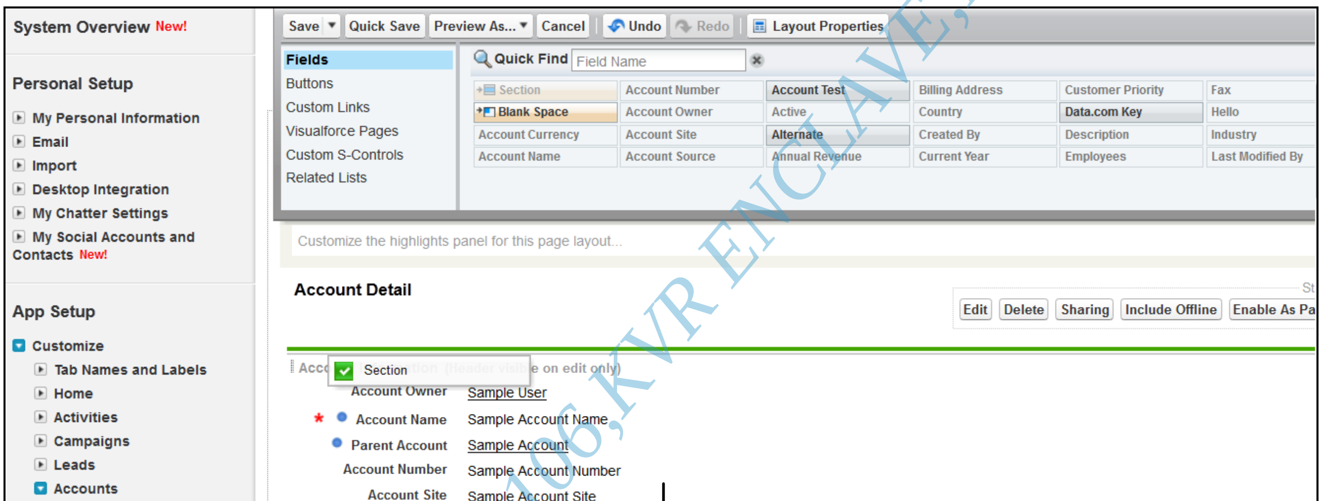


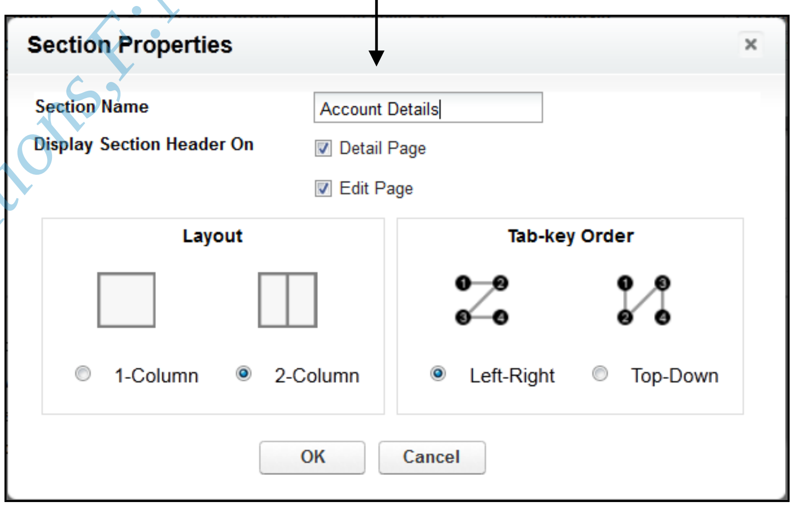


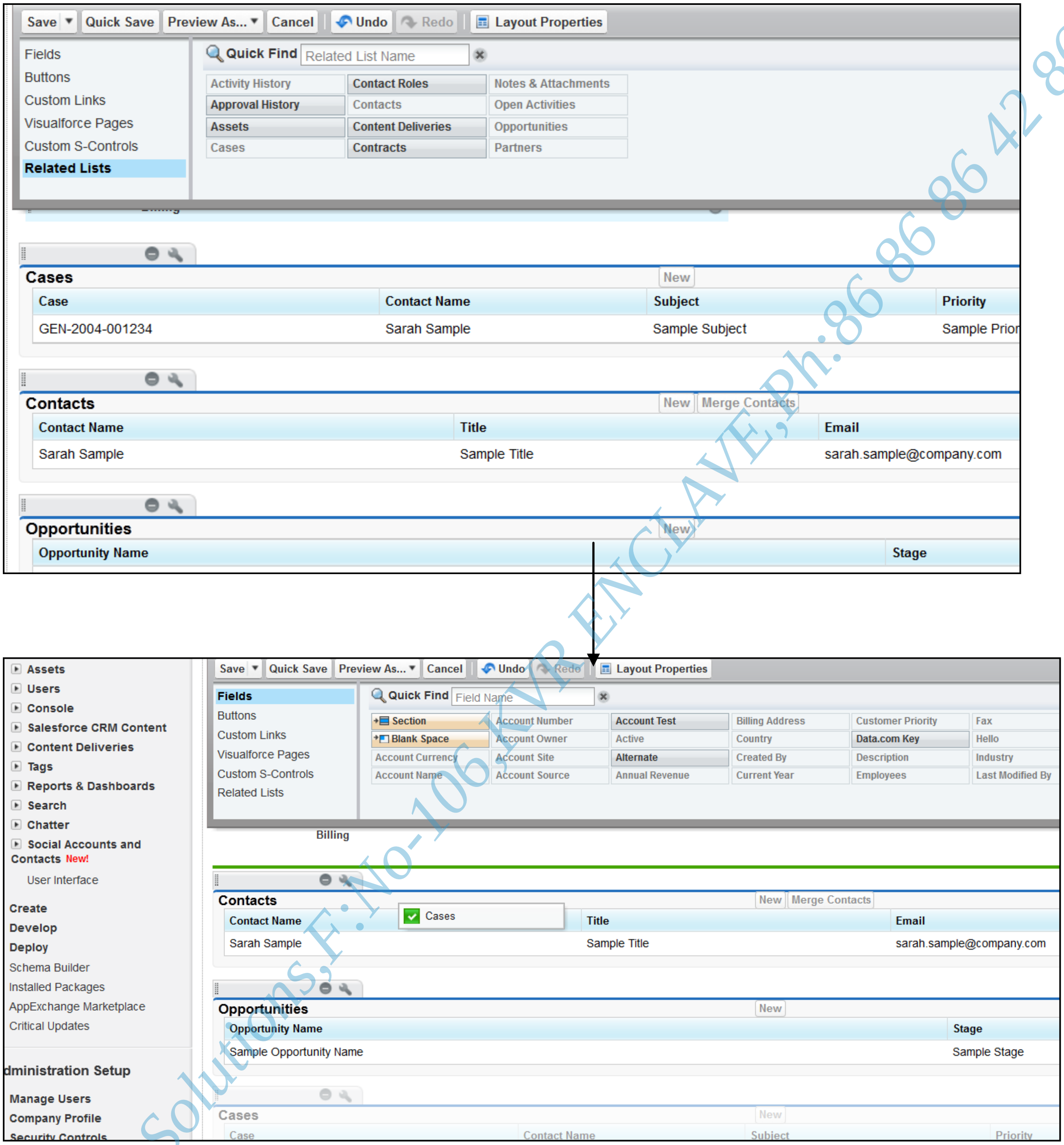
Customizing the existing Layout:



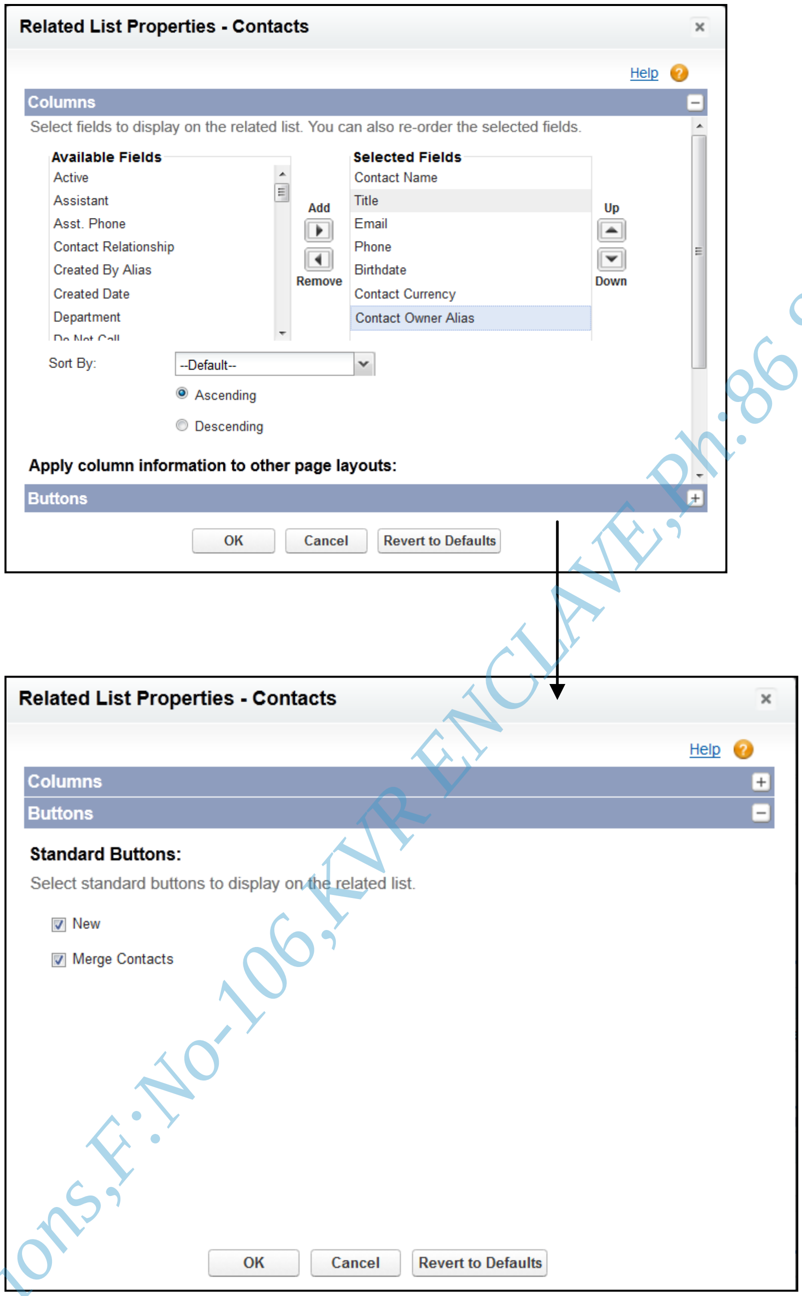

My Social Accounts and Contacts New!
App Setup
Customize
Tab Names and Labels
Home
Activities
Campaigns
Leads
Accounts
Fields
Related Lookup Filters
Validation Rules
Triggers
Partner Roles
Contact Roles
Page Layouts
Field Sets
Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Fields
Buttons
Custom Links
Visualforce Pages
Custom S-Controls
Related Lists
Quick Find
Field Name
Section
Blank Space
Account Currency
Account Name
Account Number
Account Owner
Account Site
Account Source
Account Test
Active
Alternate
Annual Revenue
Billing Address
Country
Created By
Current Year
Customer Priority
Data.com Key
Description
Employees
Fax
Hello
Industry
Last Modified By
Account Number
Sample Account Number
Account Site
Sample Account Site
Type
Sample Type
Industry
Sample Industry
Annual Revenue
INR 123.45
Account Currency
Sample Account Currency
Test URL
www.sale
Account Source
Country
Sample Country
Primary Region
Sample Primary Region
Sample Date
20/5/2012

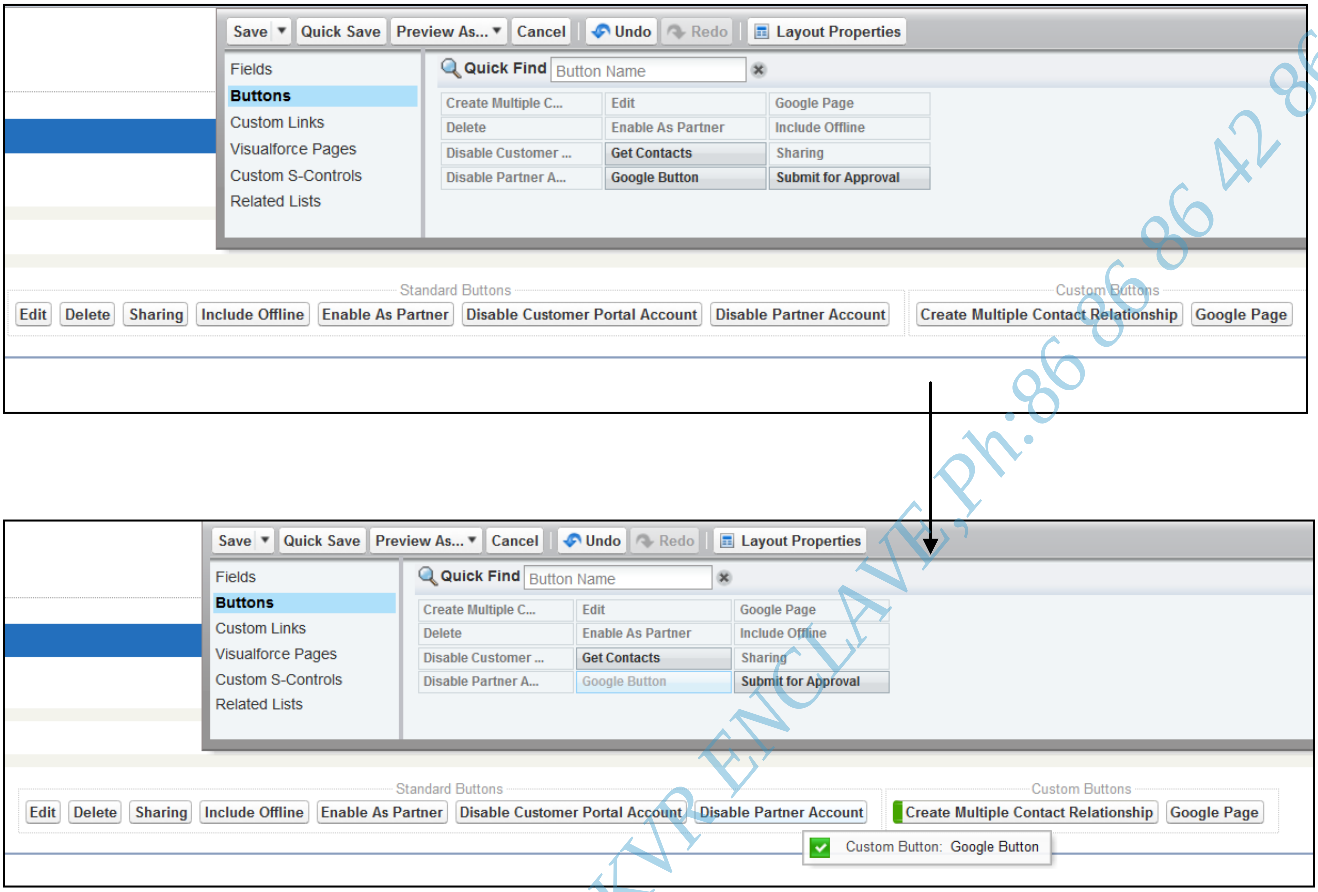

System Overview New!
Personal Setup
My Personal Information
Email
Import
Desktop Integration
My Chatter Settings
My Social Accounts and Contacts New!
App Setup
Customize
Tab Names and Labels
Home
Activities
Campaigns
Leads
Accounts
Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Fields
Buttons
Custom Links
Visualforce Pages
Custom S-Controls
Related Lists
Quick Find
Field Name
Section
Blank Space
Account Currency
Account Name
Account Number
Account Owner
Account Site
Account Source
Account Test
Active
Alternate
Annual Revenue
Billing Address
Country
Created By
Current Year
Customer Priority
Data.com Key
Description
Employees
Fax
Hello
Industry
Last Modified By
Customize the highlights panel for this page layout...
Account Detail
Edit
Delete
Sharing
Include Offline
Enable As Pa
Section
e on edit only)
Account Owner
Sample User
Account Name
Sample Account Name
Parent Account
Sample Account
Account Number
Sample Account Number
Account Site
Sample Account Site


Section Properties
Section Name
Account Details
Display Section Header On
Detail Page
Edit Page
Layout
1-Column
2-Column
Tab-key Order
Left-Right
Top-Down
OK
Cancel



Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Fields
Buttons
Custom Links
Visualforce Pages
Custom S-Controls
Related Lists
Quick Find
Related List Name
Activity History
Contact Roles
Notes & Attachments
Approval History
Contacts
Open Activities
Assets
Content Deliveries
Opportunities
Cases
Contracts
Partners
Cases
New
Case
Contact Name
Subject
Priority
GEN-2004-001234
Sarah Sample
Sample Subject
Sample Prior
Contacts
New
Merge Contacts
Contact Name
Title
Email
Sarah Sample
Sample Title
sarah.sample@company.com
Opportunities
New
Opportunity Name
Stage
Assets
Users
Console
Salesforce CRM Content
Content Deliveries
Tags
Reports & Dashboards
Search
Chatter
Social Accounts and Contacts New!
User Interface
Create
Develop
Deploy
Schema Builder
Installed Packages
AppExchange Marketplace
Critical Updates
dministration Setup
Manage Users
Company Profile
Security Controls
Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Fields
Buttons
Custom Links
Visualforce Pages
Custom S-Controls
Related Lists
Quick Find
Field Name
Section
Account Number
Account Test
Billing Address
Customer Priority
Fax
Blank Space
Account Owner
Active
Country
Data.com Key
Hello
Account Currency
Account Site
Alternate
Created By
Description
Industry
Account Name
Account Source
Annual Revenue
Current Year
Employees
Last Modified By
Billing
Contacts
New
Merge Contacts
Cases
Contact Name
Title
Email
Sarah Sample
Sample Title
sarah.sample@company.com
Opportunities
New
Opportunity Name
Stage
Sample Opportunity Name
Sample Stage
Cases
New
Case
Contact Name
Subject
Priority

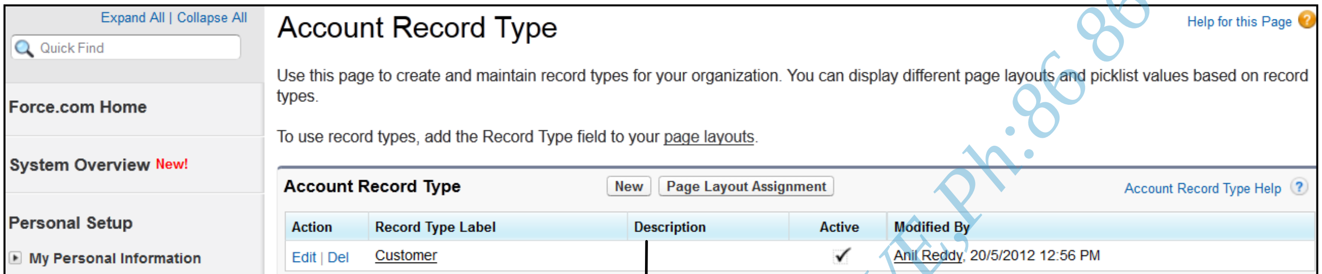

Related List Properties - Contacts
Help
Columns
Select fields to display on the related list. You can also re-order the selected fields.
Available Fields
Active
Assistant
Asst. Phone
Contact Relationship
Created By Alias
Created Date
Department
Selected Fields
Contact Name
Title
Email
Phone
Birthdate
Contact Currency
Contact Owner Alias
Add
Remove
Up
Down
Sort By:
--Default--
Ascending
Descending
Apply column information to other page layouts:
Buttons
OK
Cancel
Revert to Defaults
Related List Properties - Contacts
Help
Columns
Buttons
Standard Buttons:
Select standard buttons to display on the related list.
New
Merge Contacts
OK
Cancel
Revert to Defaults

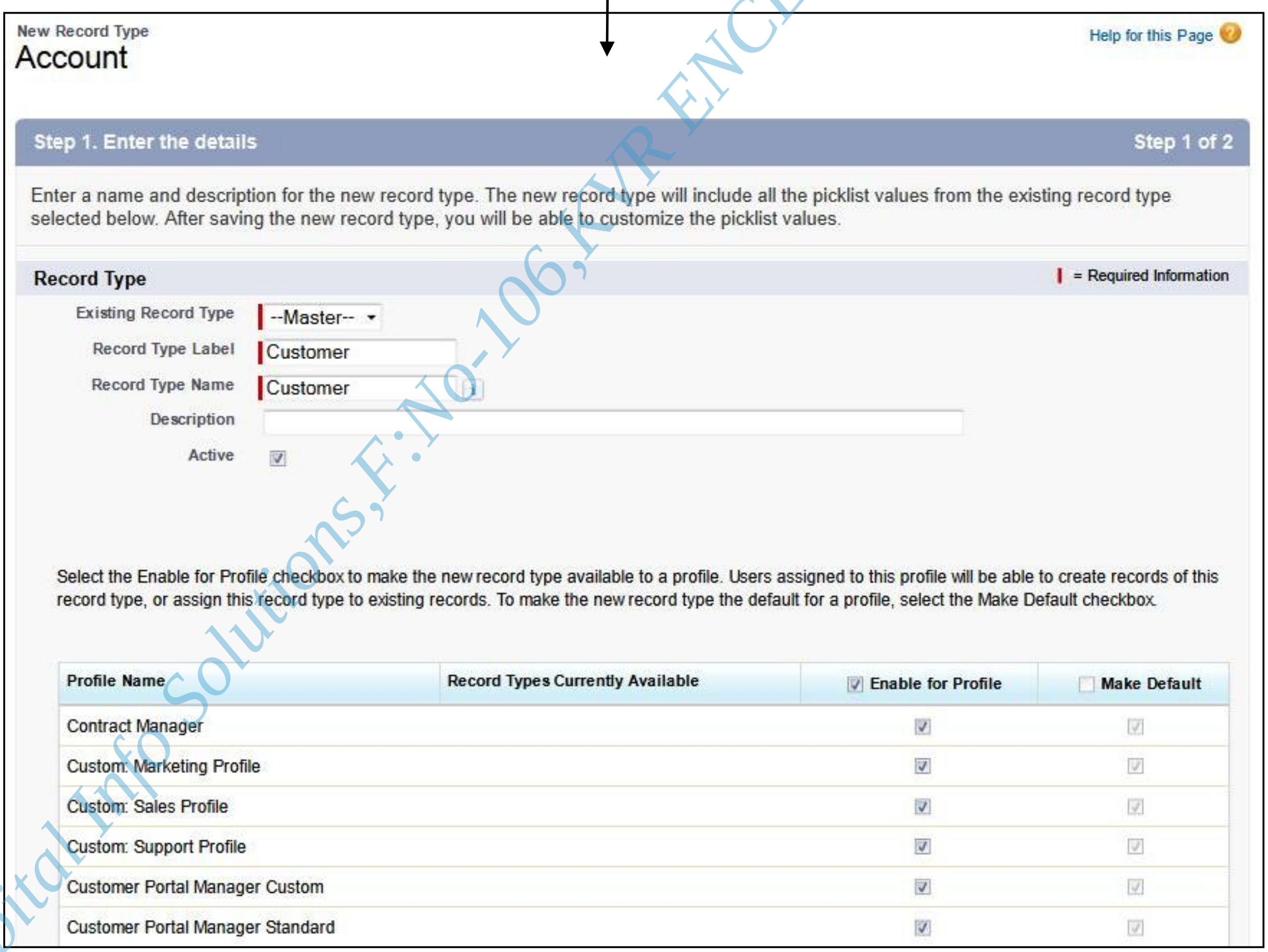

Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Fields
Buttons
Custom Links
Visualforce Pages
Custom S-Controls
Related Lists
Quick Find
Button Name
Create Multiple C...
Edit
Google Page
Delete
Enable As Partner
Include Offline
Disable Customer ...
Get Contacts
Sharing
Disable Partner A...
Google Button
Submit for Approval
Standard Buttons
Edit
Delete
Sharing
Include Offline
Enable As Partner
Disable Customer Portal Account
Disable Partner Account
Custom Buttons
Create Multiple Contact Relationship
Google Page
Custom Button: Google Button

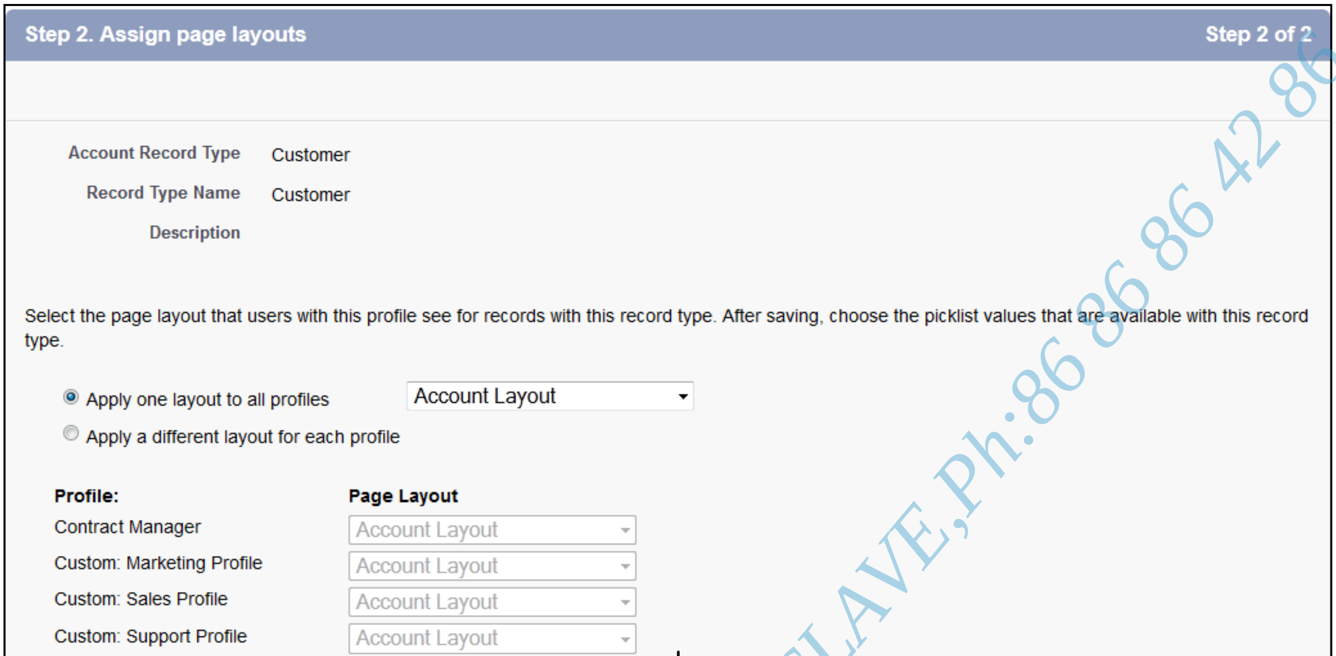
Record Types:

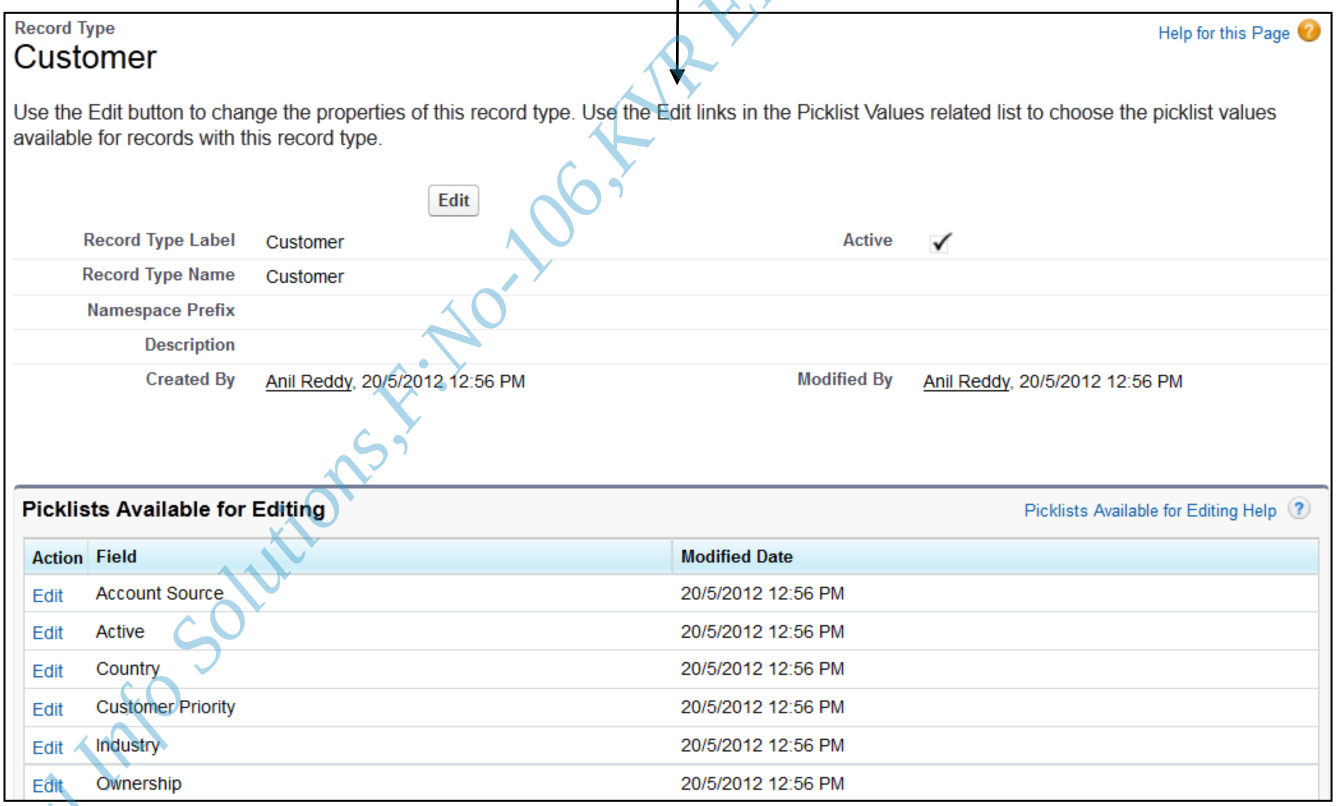
For Standard Objects, Click Your Name --> Setup --> App Setup --> Customize --> Select an appropriate object --> Click on "Record Types" ---> Click on "New" button

For Custom Objects, Click Your Name --> Setup --> App Setup --> Create --> Objects --> Click on any object name--> Go to the "Record Types" section ---> Click on "New" button

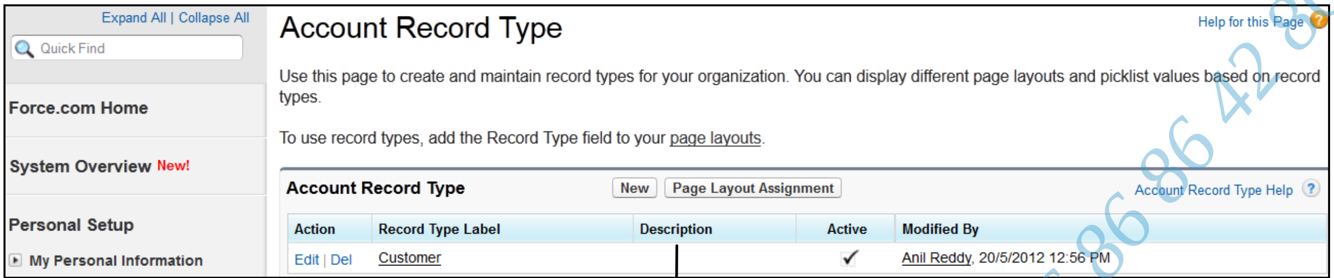


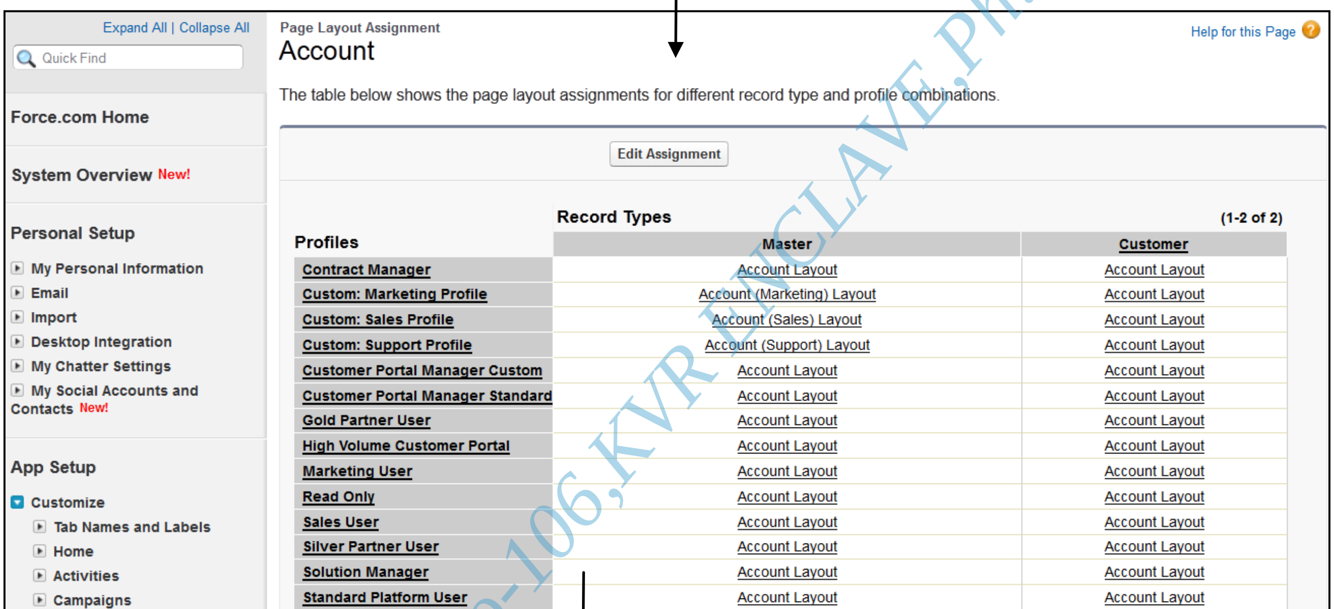


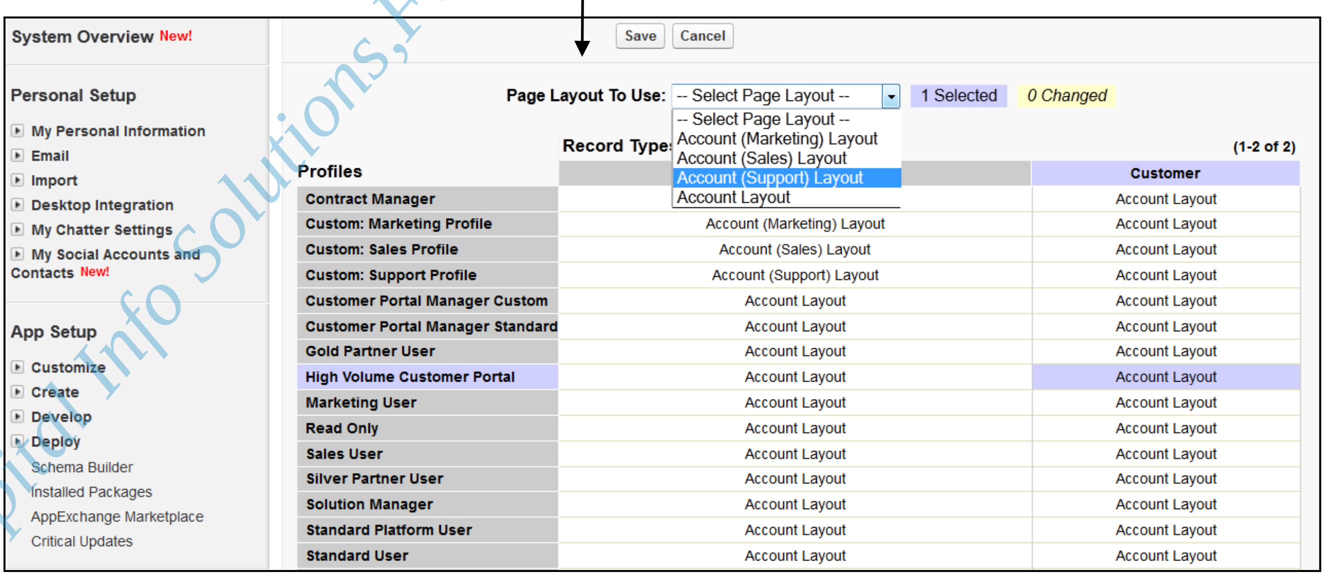

Step 2. Assign page layouts
Step 2 of 2
Account Record Type Customer
Record Type Name Customer
Description
Select the page layout that users with this profile see for records with this record type. After saving, choose the picklist values that are available with this record type.
Apply one layout to all profiles
Account Layout
Apply a different layout for each profile
Profile:
Page Layout
Contract Manager
Account Layout
Custom: Marketing Profile
Account Layout
Custom: Sales Profile
Account Layout
Custom: Support Profile
Account Layout

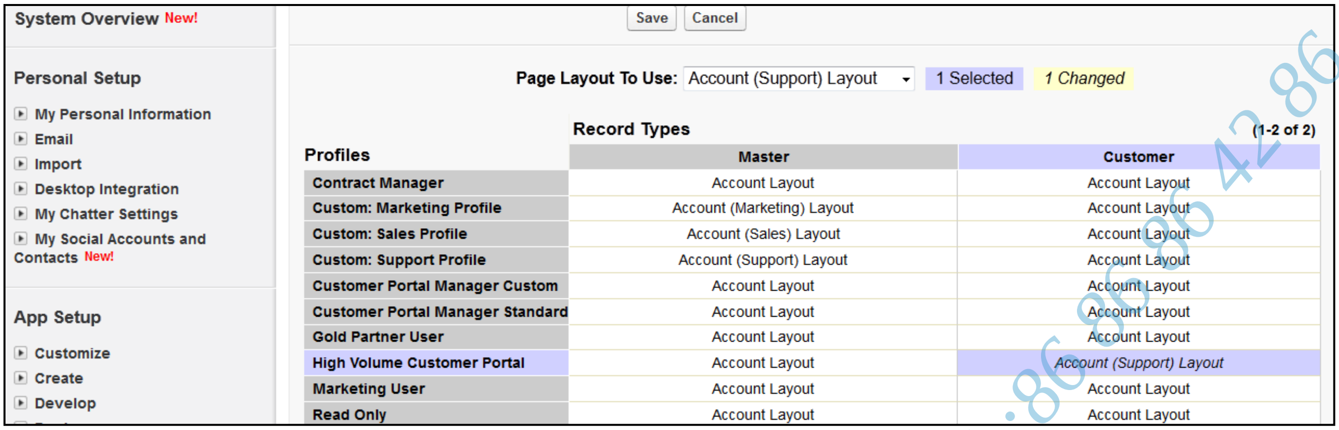

Record Type
Customer
Help for this Page
Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.
Edit
Record Type Label Customer
Active
Record Type Name Customer
Namespace Prefix
Description
Created By Anil Reddy, 20/5/2012 12:56 PM
Modified By Anil Reddy, 20/5/2012 12:56 PM
Picklists Available for Editing
Picklists Available for Editing Help
Action Field Modified Date
Edit Account Source 20/5/2012 12:56 PM
Edit Active 20/5/2012 12:56 PM
Edit Country 20/5/2012 12:56 PM
Edit Customer Priority 20/5/2012 12:56 PM
Edit Industry 20/5/2012 12:56 PM
Edit Ownership 20/5/2012 12:56 PM

Page Layout Assignment:








System Overview New!
Personal Setup
My Personal Information
Email
Import
Desktop Integration
My Chatter Settings
My Social Accounts and Contacts New!
App Setup
Customize
Create
Develop
Save
Cancel
Page Layout To Use: Account (Support) Layout
1 Selected
1 Changed
Record Types
(1-2 of 2)
Profiles
Master
Customer
Contract Manager
Account Layout
Account Layout
Custom: Marketing Profile
Account (Marketing) Layout
Account Layout
Custom: Sales Profile
Account (Sales) Layout
Account Layout
Custom: Support Profile
Account (Support) Layout
Account Layout
Customer Portal Manager Custom
Account Layout
Account Layout
Customer Portal Manager Standard
Account Layout
Account Layout
Gold Partner User
Account Layout
Account Layout
High Volume Customer Portal
Account Layout
Account (Support) Layout
Marketing User
Account Layout
Account Layout
Read Only
Account Layout
Account Layout

Security Controls:-

Record owership:-

* The user(or queue for Cases and Leads) who controls or has rights to that particular data record.

There are two types of Owners:-

* Users
* Queues

* Most records have an associated owner. An owner has the following special privileges:

→ View and edit capabilities
→ Transfer capability
→ change ownership
→ Deletion capabilities

Record owners have Full Access

Important assumption: object permissions enabled.

* It is possible for a user to own a record and not see it if they don't have the "Read" permission on the object.

Security controls
- → Organization wide Defaults
- → sharing settings
- → Role hierarchy.

Organization wide Defaults:-

The following is the path for setting Organization-wide Defaults :

click Your Name

↳ setup

↳ security controls

↳ sharing settings

↓

click Edit in the Organization wide Defaults area.

↓

select the access for each object.

* Organization wide Defaults defines the baseline level of access to data records for all users in the organization.

* Organization wide Defaults are used to restrict access to data.

* OWD's can be defined for the custom as well as several standard objects.

OWD access level actions:-

The organization-wide default (OWD) access levels allows the following actions to be applied to object records

① Access Level : Public Full Access (option for setting the campaign object only)

Actions: change ownership of record

search records

Report on records

Add related records

Edit details of record

Delete record.

Access levels for the Campaign OWD's can be set to Private, Public Read only, Public Read/write, or Public Full Access. when Campaigns are set to Public Full access, all users can view, edit, transfer, delete, and report on all Campaign records.

Ex: Anil Reddy is the owner of a campaign, all other users in the application can view, edit, transfer, or delete that campaign

2) Access Level: Read/write/Transfer
↳ (option for setting the Lead and case objects only).

An user have following privileges for above access level:

→ change ownership of record.

→ search records

→ Report on records

→ Add related records

→ Edit details of record.

3) Access Level: Read/write

An user have following privileges for this access level

→ search records

→ Report on records

→ Add related records

→ Edit details of record.

Note1:
Access level: Public Read/write/Transfer

↓

Access levels for case or Lead OWD's can be set to pri-vate, Public Read only, Public Read/write, or Public Read/write/Transfer. we case or Leads are set to Public Read/write/Trans-fer, all users can view, edit, transfer, and report on all case or Lead records.

Ex: If Andy is the owner of case number xxx, all other users can view, edit, transfer ownership, and report on that case But only ~~Harry~~ Andy can delete or change the sharing on case xxx.

Note: The above option is available on Cases or Leads only.

Note: 2

Access Level: Public Read/write

↓

All users can view, edit, and report on all records.

Ex: If Sourabh is the owner of Account record "Osmania Uni:", all other users can view, edit, and report on "Osmania Uni" account.

However only ~~Mr~~ Sourabh has the ability to delete the "Osmania Uni." account record or alter the sharing settings.

4) Access Level : Public Read Only

The following privileges, the user will get with Public Read only access level:

→ Search records
→ Report on records
→ Add related records
→

* All users can view and report on every recod but they cannot edit them. Here, only the record owner and user's above that user's role in the role hierarchy can edit the records

Ex: Mike is the owner of the Account record "GE TRP" and Mike is in the role international sales, reporting to Julia; who is in the role VP of international sales, In this case, both Mike and Julia have full Read/write access to "GE TRP" acc-
-ount.

5) Access Level : Private

Only the record owner, and users above that role in the hierarchy, can view, edit, and report on those records.

Ex: If Mike is the owner of an account record, and he is assigned to the role of Internation Sales, reporting to Julia who is in the VP of international sales role, then Julia can also view, edit, and report on Mike's accounts.

6) Access Level: No Access, View only, or Use

This option is available only for Price Books.

Access levels for the Price books OWDs can be set to either No Access, View only or Use.

→ Use is the default access level and allows all users to access the Price Book information as well as using the Price Book Configuration for opportunities with Products.

→ View only allows users to access the price Book information but not to use that Price Book detail in opportunities with products

→ No Access restricts users from accessing information for Price Books and Prices.

Grant Access using Hierarchies:-

By default, Salesforce uses role hierarchy, to automatically grant record access to users above the record owner in the hierarchy.

→ This automatic granting of access to user's data to other users higher up in the ~~sales~~ hierarchy can be disabled for custom objects using the "Grant Access Using Hierarchies" checkbox.

when this checkbox is not selected, only the ~~owner~~ record owner and users granted access by the organization wide defaults will get the access to the records.

Note: The option "Grant Access Using Hierarchies" is autom--atically checked for standard objects. we cannot change this option.

We can able select and deselect this option for custom objects.

Controlled by Parent:-

When Controlled by Parent is set on any object a user can perform an action (such as view, edit, or delete) on the record based on whether they can perform that same action on the parent record associated it.

Ex: If a contact record is associated with the XYZ account using Controlled by Parent, then a user can only edit that contact if they can also edit the XYZ account record.

* When a custom object is on the detail side of a master-detail relationship with a standard object, its OWD's is automatically set to "Controlled by Parent" and it is not editable.

i.e Child records in master-detail relationships inherit their organization wide defaults from their parents.

Note:- child records in lookup relationships have independent organization wide defaults from their parents.

* Changing organization wide defaults can potentially delete manual sharing if that sharing is no longer needed.

Ex: changing from Private to Public Read/write.

Imp Note:-

Although "Grant Access Using Hierarchies" can be dese-lected to prevent users that are higher in the role hierar-chy having automatic access, users with the View All and Modify All object permissions and the View All and Modify All Data profile permissions can still access records they do not own.

i.e Organization wide Defaults does not work if the profile have View All and Modify All permissions for an object.

Limitations:-

* The Organization-wide Defaults (OWD) for the solution Object in Salesforce is Public Read/write which cannot be changed.

* ~~service~~ when a custom object on the detail side of a M-D relationship with a standard Object, its OWD's is set to Controlled by Parent and it is not editable.

Introduction to Role Hierarchy:-

Once the organization-wide Defaults have been established, we can use a role hierarchy to ensure that managers can view and edit the same records as their line reports (subordinates). Users at any level are always able to view, edit, and report on all data owned by or shared with users below them in the hierarchy, unless the OWD settings specify ignoring the hierarchies.

Role and Role Hierarchy:-

Role:

A Role controls the level of visibility that users have to an Organization's data.

* A user may be associated to one role.

Role Hierarchy:-

→ Controls the data visibility

→ controls record roll up for reporting

→ Users inherit the special perivileges of data owned by or shared with users below them in the hierarchy.

*> with standard objects, access to records rollup through the Role Hierarchy.

*> with Custom objects, developers choose whether or not access should roll up through the role hierarchy i.e determined by the "Grant Access using Hierarchies" setting on Organization wide Defaults.

Creating Role Hierarchy:-

To view and manage organization roles,

click Your Name

↳ setup

↳ Administration setup

↳ Manage Users

↳ click on "Roles".

choose one of the following list view options.

Show in tree View

↳ we can see a visual representation of the parent-child relationships between roles. click "Expand All" to see all roles or "Collapse All" to see only top-level roles. To expand or collapse, click the plus(+) or minus (-) icon.

Show in sorted list view

↳ we can see a list that we can sort alphabetically by role name, ~~part~~ parent role (Reports To), or report display name.

Show in list view

↳ we can see a list of roles and their children, ~~The~~ grouped alphabetically by the name of the top-level role. The columns are not sortable. This view is not available for hierarchies with more than 1000 roles.

* To create a role, click "New Role" or "Add Role", depending whether we are viewing the list view or tree view of roles.

→ To edit a role, click Edit next to a role name, then update the role as needed.

→ To delete a role, click "Delete" Next to the role name.

→ Assigning Users to Role:-

To assign users to a particular role.

click Your Name
↳ setup
↳ Manage Users
↳ 1. click on "Roles".

2. click "Assign" next to the name of the desired role

3. Make a selection from the drop-down list to show the available users.

4. Select a user on the left, and click "Add" button to assign the user to this role.

Notes:-

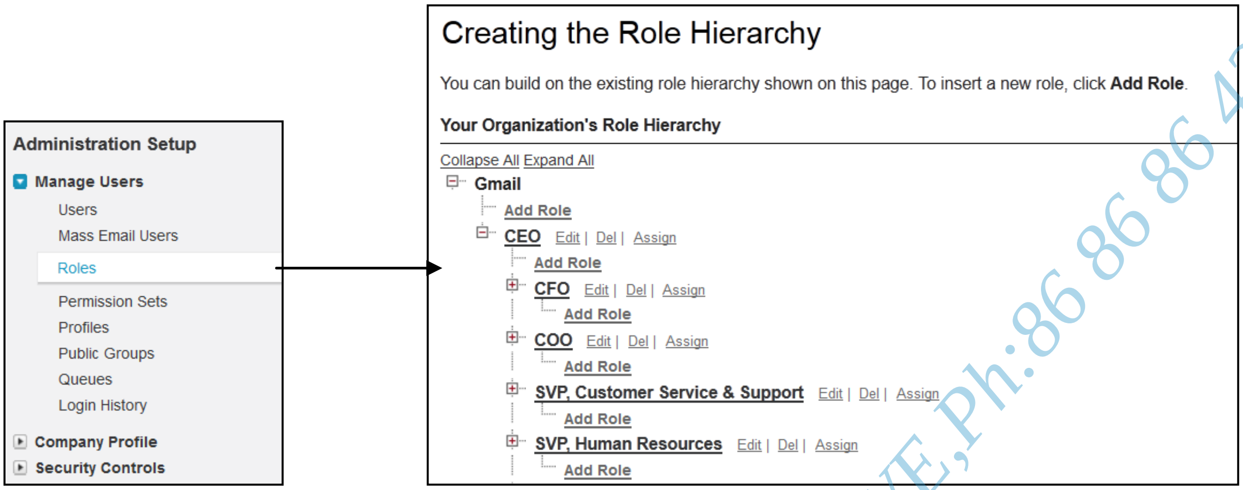
1. We can create upto 500 roles for organization.

2. Every user must be assigned to a role.

3. All users that require visibility to the entire organization should belong to the highest level in the hierarchy.

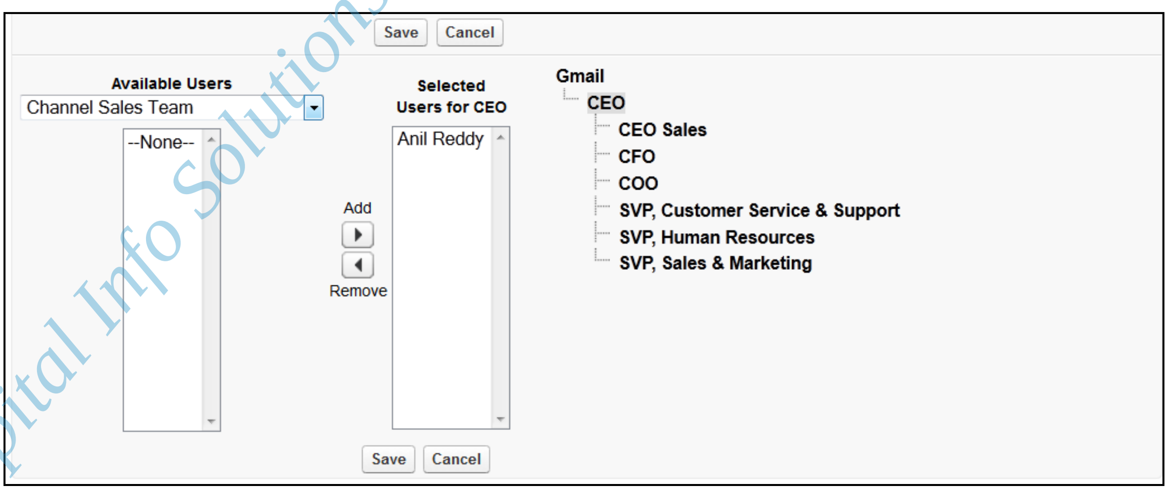
4. When we change a User's role, any relevant sharing rules are evaluated to add or remove access as necessary.

Roles:

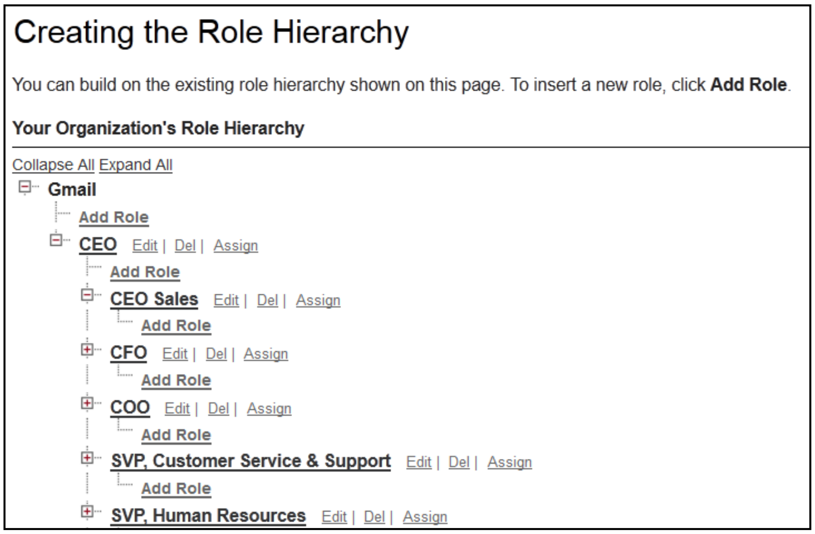


Click on the "Add Role" button

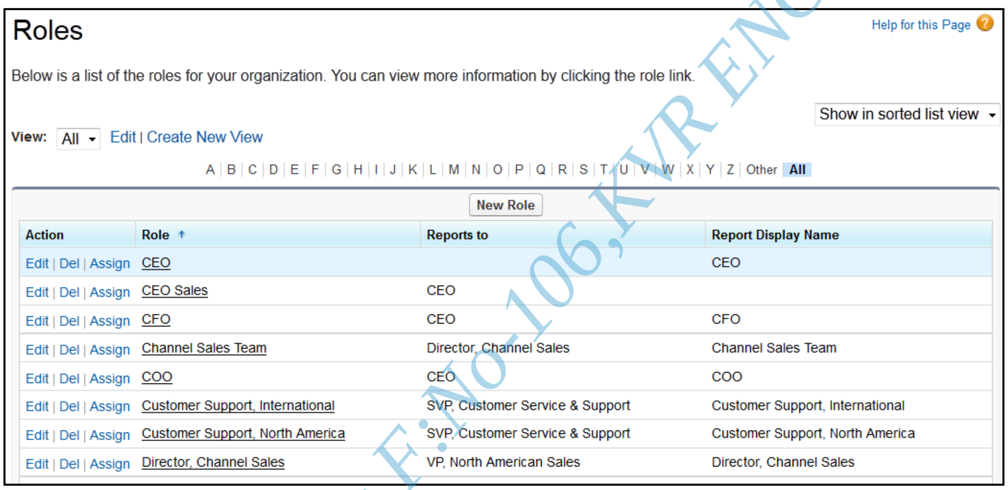
Click on the Assign button for assigning role to users.



The following screenshot shows the Role hierarchy in Tree View

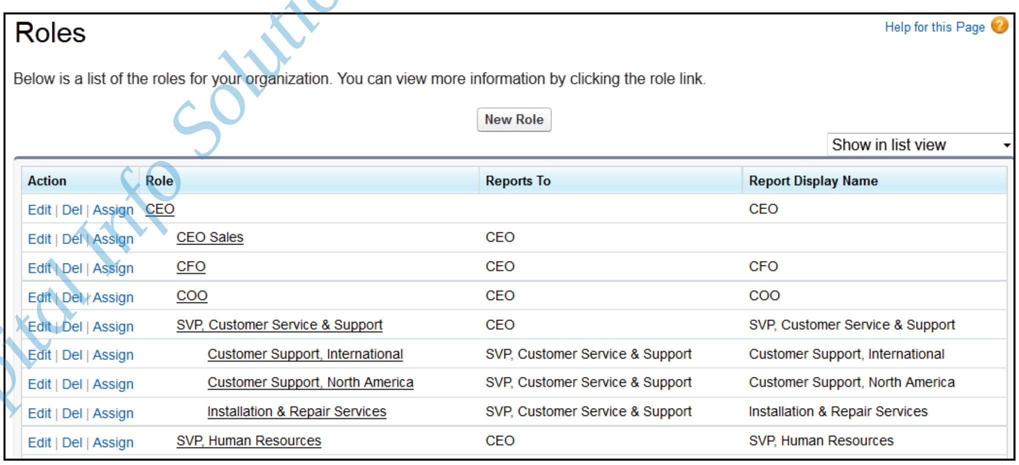


The following screenshot shows the role hierarchy in the sorted list view



Action	Role	Reports to	Report Display Name
Edit | Del | Assign	CEO		CEO
Edit | Del | Assign	CEO Sales	CEO	
Edit | Del | Assign	CFO	CEO	CFO
Edit | Del | Assign	Channel Sales Team	Director, Channel Sales	Channel Sales Team
Edit | Del | Assign	COO	CEO	COO
Edit | Del | Assign	Customer Support, International	SVP, Customer Service & Support	Customer Support, International
Edit | Del | Assign	Customer Support, North America	SVP, Customer Service & Support	Customer Support, North America
Edit | Del | Assign	Director, Channel Sales	VP, North American Sales	Director, Channel Sales

The following screenshot shows the role hierarchy in the List View



Action	Role	Reports To	Report Display Name
Edit | Del | Assign	CEO		CEO
Edit | Del | Assign	CEO Sales	CEO	
Edit | Del | Assign	CFO	CEO	CFO
Edit | Del | Assign	COO	CEO	COO
Edit | Del | Assign	SVP, Customer Service & Support	CEO	SVP, Customer Service & Support
Edit | Del | Assign	Customer Support, International	SVP, Customer Service & Support	Customer Support, International
Edit | Del | Assign	Customer Support, North America	SVP, Customer Service & Support	Customer Support, North America
Edit | Del | Assign	Installation & Repair Services	SVP, Customer Service & Support	Installation & Repair Services
Edit | Del | Assign	SVP, Human Resources	CEO	SVP, Human Resources

Sharing Rules:-

With sharing rules, we can make automatically exceptions to Organization-wide Default settings for defined sets of users.

For example,

Use sharing rules to extend sharing access to users in Public Groups, roles.

* sharing rules can never be stricter than Organization-wide default settings. They simply allow greater access for particular users.

Comparison of profiles & the sharing model:-

profiles	Sharing Model
* Controls access to objects (Ex: Accounts, Contacts... Custom objects...)	* Controls access to records. (ex: one account record (Osmania University), one contact record (Anil Reddy) and Custom object records.

* So, a user's profile might specify that a user can see Accounts, but the sharing model determines which accounts records that user can see.

* The sharing model might determine that a user can see Anil Reddy record, but ~~not~~ profile specifies which fields that user can view and edit.

To access the sharing Rules related list,

click Your Name
↳ setup
↳ Administration setup
↳ security controls
↳ sharing settings, then scroll to the sharing Rules related list, From we can

* Create and edit Lead sharing Rules.
* Create and edit Account sharing Rules
* Create and edit Contact sharing rules.
* Create and edit Opportunity sharing rules
* Create and edit case sharing rules
* Create and edit ~~Solutions~~ Campaigns sharing rules
* Create and edit Custom object sharing rules.

Creating Sharing Rules:-

To Create sharing Rules for any type of records.

click Your Name
↳ setup
↳ Security controls
↳ Sharing settings
↓
1. Go to any object sharing Rules related list and

click on "New" button.

2. Enter the Label and Rule Name

3. select the following rule type

Based on record owner → In the owned by line, specify the users whose records will be shared: select ~~the~~ a category from the first drop down list and set of users from the second drop-down list.

Based on Criteria → specify the Field, operator and value Criteria that records must match to be included in the sharing rule. The fields available depend on the object selected, and the value is always a literal number or string.

click "Add Filter Logic..." to change the default AND relationship between each ~~of~~ filter.

4. In the Share with line, specify the users who should have access to the data. select a category from the first drop-down list and a set of users from the second drop-down list.

5. Select the level of access for the users

Read only → Users can view, but not update records

Read/write → Users can view and update records.

6. click on "Save" button.

Important points about sharing Rules:-

* Sharing Rules apply to all new and existing records owned by the specified role or group members
* sharing rules apply to both active and inactive users.
* when we change the access levels for a sharing rule, all existing records are automatically updated to reflect the new access levels.
* ~~If~~ when we delete a sharing rule, the sharing access created by that rule is automatically removed.
* When we modify which users in a group or role, the sharing rules are reevaluated to add or remove access as necessary.
* Managers in the role hierarchy are automatically granted the same access that users below them in the hierarchy have from a sharing rule.
* We can edit the access levels for any sharing rule we cannot change the specified groups or roles for the rule.

Manual Sharing:-

* It is used to open up access to records on a one-off basis when it is too difficult to come up with a consistent set of users who need access.
* Granted by owners, anyone above owners in the role hierarchy and System Administrators.

* Users grant access simply by clicking on the "Sharing" button found on the Record Detail page.

<u>Note</u>: The sharing button does not appear if the object's Organiz--ation-wide sharing defaults are set to Public Read/write.

<u>Note</u>:- what are the ways to obtain Access to a record:

<u>Full Access</u>

* owner field
  - → User
  - → Queue member
* Above user (who has ownership) in role hierarchy)
* profile permission: "Modify All Data".
* object permission: "Modify All"

<u>Read/write</u> or <u>Read Only Access</u>

* organization wide Defaults
* Above user (who has read/write or read only access) in role hierarchy.
* Manual sharing
* sharing rules
* Apex sharing.
* profile permission: "View All Data".
* object permission: "View All".

Customizing Search Layouts:-

Search Layouts determines customize which fields display for users in search results, search filter fields, lookup diaglogs, the recent lists on tab home pages, and in lookup phone dialogs.

* we can specify a different set of fields to show in each search layout. The settings apply to all users in organization.

* Additionally we can customize which buttons display in custom list views and search results. we can hide standard list view button or display a custom button.

* Go to the following path to access the Search layouts

click Your Name
→ Setup
→ Customize
→ select the appropriate object
↓
1. Choose the "Search Layouts" link.

2. click "Edit" next to the layout we want to Customize. we can specify a different set of fields to display for search results, lookup dialogs, recent records lists on tab home pages, lookup phone dialogs, List views and search filter fields.

3. Use the arrows to add or remove items from the layout, and to define the order in which the fields should display.

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3. Use the arrows to add or remove items from the layout, and to define the order in which the fields should display.

4. click on "Save" button.

Notes on Search Layouts:-

* The search layout does not determine which fields are searched for keyword matches.

* We can add upto 10 fields to each search layout.

* we cannot remove unique identifying fields, such as Account Name, Opportunity Name or Case Number from the search layouts. These fields must be listed first in the order of fields in the search layout.

* we cannot add long text fields such as Description, solution Details, or Custom long text area fields to search layouts.

* If a field is included in the search layout but hidden for some users via field-level security, those users do not see that field in their search results.

* Formula fields are not available in search result layouts.

Validation Rules:-

Validation rules help improve data quality by preventing users from saving incorrect data. We can define one or more validation rules that consist of an error condition and corres-ponding error message.

* Validation rules are executed at record save time.
* A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of True or False
* Validation Rules also include an error message to display to the user when the rule returns a value of "True" in formula is due to an invalid value.
* Error message can be displayed directly below field or at top of the page
* Multiple error messages may be displayed at one time.

* When the validation rules are defined for a field or set of fields, the following actions are fired when the user creates a new record or edits an existing record and then clicks the "Save" button.

1. Salesforce executes the validation rules and only if all data is valid, then record will save.

2. For any invalid data, salesforce displays the associate error message without saving the record.

* Even if the fields referenced in the validation rule are not visible on the page layout, the validation rules still apply and will result in an error message if the rule fails.

Examples of validate Data:-

1. Make fields conditionally required, depending on the value of another field.

2. Ensure that numbers are within a specific range, such as discount is less than 30%.

3. Start Date is before end Date.

Creating Validation Rules:-

For standard objects 1. click Your Name → setup → Customize select the appropriate object → click Validation Rules.

2. click "New" in the Validation Rules section.

3. Enter the Rule Name (Unique identifier of upto 80 characters with no spaces or special characters such as extended characters)

4. Select the "Active" checkbox (It determines that the rule is enabled)

5. Enter the "Description" → A 255 character or less description that distinguishes the validation rule from others.

6. Give the "Error Condition Formula" → The expression is used to validate the field.

7. Enter the "Error Message"

↓

The message that displays to the user when a field fails the validation rule.

(OR)

The Error Message field is the text to be displayed to the user when a record update fails the validation rule.

8. Select the "Error location"

The "Error location" is used to determine where on the page the error is displayed to the user. locations are

* Top of Page
* Field.

* The Top page option sets the error message to be displayed at the top of the page.
* To Display the error next to a field, choose the "Field" option and then select the appropriate field.

Note: If the error location is set to a field, that is later deleted or a field that is read only or not visible on the page layout, Salesforce automatically changes the error location to "Top of Page".

* click on "Save" button ~~for~~ to finish ~~starting~~ the validation rule.
* click on "Save & New" button to create additional Validation rules.

Example: The following examples shows the opportunity validation rule to ensure that users cannot enter a date in the past into the "close Date" field.

Formula: CloseDate < TODAY( )

Note: An Error Message will be displayed to the user if the formula evaluates to TRUE.

* An above example error message for this validation rule is "Close Date Must Be a Future Date".

Important functions in Validation Rules:-

These functions we will use in both Validation Rules and workflows.

1. ISNEW( ) → Checks if the formula is running during the Creation of a new record and returns TRUE if the ~~values~~ existing record is being updated this function returns "FALSE".

Example: Use the following validation rule to prevent users from Creating a record with a close date in the past and checks if the user is creating a new opportunity and if so, ensure that the close Date is today or after today.

Formula: AND(ISNEW( ), CloseDate < TODAY( ))

AND: Returns a "TRUE" ~~on~~ response if all values are true; returns a "FALSE" response if one or more values are false.

Example: AND (~~Student__c~~ Condition 1, Condition2, ...)

This formula ~~Condition~~ is true, when condition 1, Condition 2 are true at a time.

OR: Determines if expressions are true ~~ture~~ or false. Returns "TRUE" if any expression is true. Returns "FALSE" if all expression are false.

Example: OR (Condition1, Condition2, ...)

This formula is true, when any condition is true and it is false, if all the Conditions are false.

IF

Determines if expression are true or false. Returns a given value if true and another value if false.

Ex: IF (Payment_Due_Date__c < TODAY( ), "PAYMENT OVERDUE", null)

Payment_Due_Date__c < TODAY( ) → logic_test

"PAYMENT OVERDUE" → value if true

null → value if false.

Note: This example uses a custom field called Payment Due Date. And above formula determines if the payment due date is past ~~and~~. If so, returns the text "PAYMENT OVERDUE". and if not, leaves the field blank.

ISPICKVAL:-

Determines if the value of a picklist field is equal to a text literal we specify.

Ex:

ISPICKVAL (Country__c, "India")

↓ picklist field ↓ text literal.

This example uses the custom field 'Country__c' and above formula is true when the Country is equal to India.

Scenario:-

The following validation rule prevent users from creating a Account with a Record status is "Unvalidated".

Formula: ISPICKVAL(Record_status__c, "Unvalidated").

The above scenario uses the custom field called Record Status (Data type = Picklist) with values

1. Unvalidated
2. Validated
3. Rejected.

ISCHANGED:-

Compares the value of a field to the previous value and returns TRUE if the values are different. If the values are the same, this function returns FALSE.

Ex: ISCHANGED(Name)
↓
field (Account Name)

The above formula prevent users from chaning the Account Name. i.e. Create a Account record with Account Name = "Test" and now ~~[illegible]~~ changing the Account Name to "Test 2". This validation rule will fire and gives the error message.

PRIORVALUE:- Returns the previous value of a field.

Syntax:- PRIORVALUE(field)

~~The~~ Scenario:-

The following validation rule will fire when the Record Status changing from "Unvalidated" to "Validated".

Formula:-

ISPICKVAL(PRIORVALUE(Record_status__c), "Unvalidated")

&& ISPICKVAL(Record_status__c, "Validated")

ISBLANK:-

Determines if an expression ~~has~~ does not have a value and returns TRUE ~~if it does not~~. If it contains a value, this function returns FALSE.

Ex: ISBLANK(~~Na~~ expression)

↓

Here we can replace a field

Ex1: ISBLANK(Active__c)

↓

If it is picklist field, then we have to give

ISBLANK(TEXT(Active__c))

* If we want to make the field required, then we have to use ISBLANK() function.

ISBLANK(expression)

↓

This expression allows both number and text fields.

ISNULL:-

Determines if an expression is null (blank) and returns TRUE if it is. If it contains a value, this function returns FALSE.

Syntax:- ISNULL(expression)

↓

only Number fields, but here text fields will not be allowed.

Ex: ISNULL(Amount__c) → This will make the Amount

↓

only Number field.

field required.

* what is difference between ISBLANK() and ISNULL()?

Ans:- Both determines if an expression has a value and returns TRUE if it does not. If it contains a value this function returns FALSE.

ISBLANK(expression) : The expression allows both number and text fields.

→ Both number and text fields.

ISNULL (expression) : Here the expression allows only number fields.

→ Only number fields.

TODAY :- Returns the current date as a date data type.

Syntax:- TODAY()

Ex: SampleDate < TODAY()

↓

This example ensures that users cannot change the SampleDate to any date in the past.

YEAR :- Returns the four-digit year in number format of a given date.

Syntax :- YEAR(date)

Ex: YEAR(TODAY()) → 2012

REGEX:-

Compares a text field to a regular expression and returns TRUE if there is a match. otherwise, it returns FALSE.

Syntax:- REGEX (text, regex_text)

text ↓ text field

regex_text → regular expression is a string used to describe a format of a string according to certain syntax rules.

Ex: The following example ~~us~~ ensures that a custom field called SSN matches a regular expression representing a valid social security number format of the form 999-99-9999

Ex: REGEX(SSN__c, "[0-9]{3}-[0-9]{2}-[0-9]{4}")

SSN__c ↓ field

"[0-9]{3}-[0-9]{2}-[0-9]{4}" ↓ regular expression.

Email Templates:-

We can create four different types of email templates.

i) Text

ii) HTML (using Letterhead)

iii) Custom (without using Letterhead)

iv) Visualforce.

Text → All users can Create or change text email template

HTML with letterhead → Administrators and users with the "Edit HTML Templates" permission can create HTML email templates based on a letterhead.

Custom HTML → Administrators and users with the "Edit HTML Templates" permission can create custom HTML email templates without using a letterhead.

Visualforce:- Administrators and developers can create using Visualforce. Visualforce email templates allow for advanced merg-ing with a recepients data, where the content of a template can contain information from multiple records.

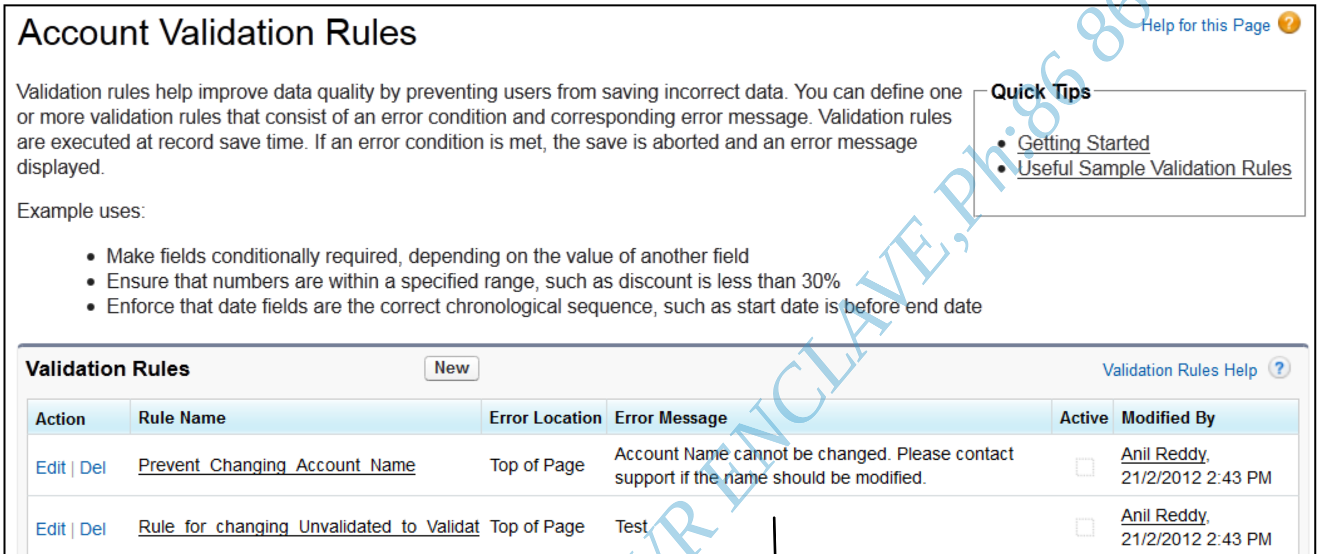
* All of these email templates can include text, merge fields and attatched files.

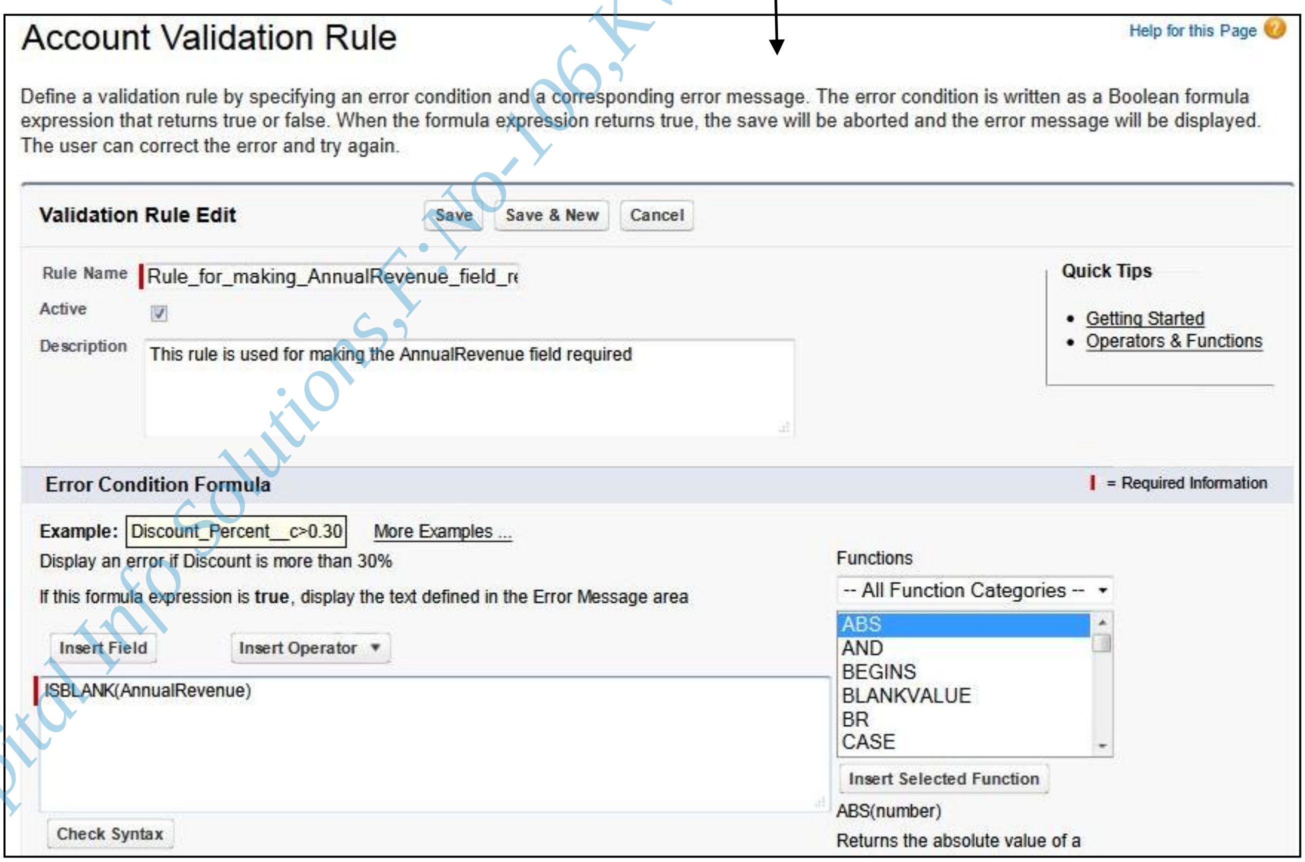
* We can also include images on HTML and Visualforce templates.

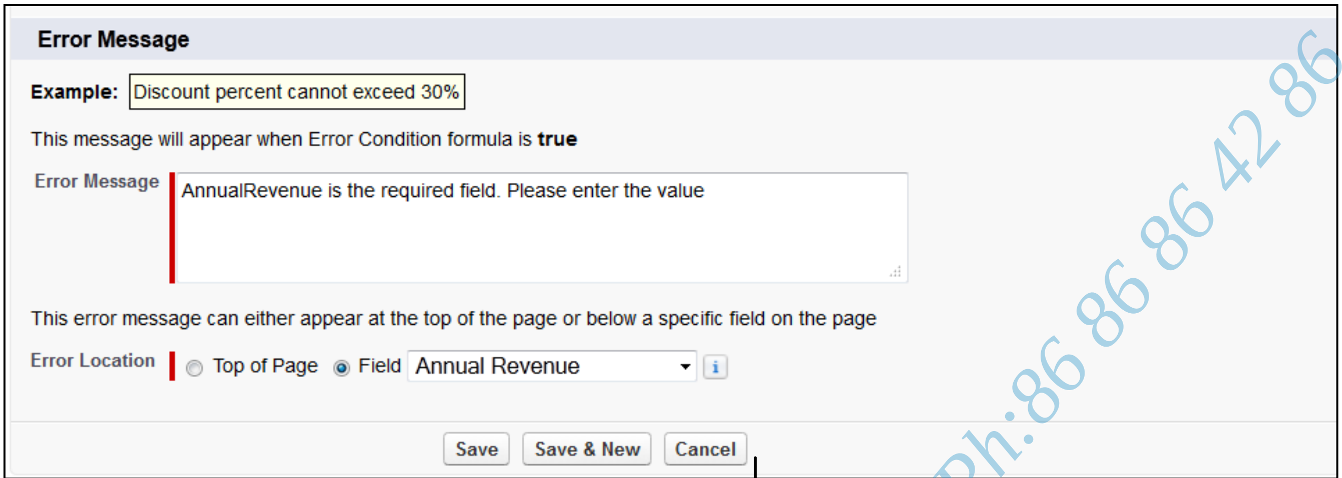
Validation Rules:

For Standard Objects, Click Your Name --> Setup --> App Setup --> Customize --> Select an appropriate object --> Click on "Validation Rules" ---> Click on "New" button

For Custom Objects, Click Your Name --> Setup --> App Setup --> Create --> Objects --> Click on any object name--> Go to the "Validation Rules" section ---> Click on "New" button







Go to the Account detail page and click on Save button without entering the Annual Revenue field.

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* All of these email templates can include text, merge fields and attatched files.

* We can also include images on HTML and Visualforce templates.

* Text and HTML templates can also be used when we send mass email.

* We can't send a mass email using a visualforce email templates.

Creating Text Email Templates:-

~~click Your Name → setu~~

For Creating Email Templates with the type "Text"

click Your Name
↳ Setup
↳ Administration Setup
↳ Communication Templates
↳ click on "Email Templates".
↓

1. click on "New Template" button.

2. choose the "Text" template type, and click "Next".

3. choose the folder in which to store the template.

4. Select the "Available For Use" checkbox if we would like this template offered to users when sending an email.

5. Enter the ~~Templ~~ Email Template Name and Template Unique Name.

6. Select an default Encoding setting to determine the charact-
-er set for the template.

7. Enter a description for the template. Both template name and description are for internal use only.

8. Enter the "Subject" for the message that appear as subject for email.

9. Enter the text to appear in the message.

10. Optionally, enter merge fields in the template subject and text body. These fields will be replaced with information from records when we send an email.

<u>Note</u>: Merge Fields Overview:—

Merge fields serve as placeholders for data that will be replaced with information from records, user information, or company information.

* When we insert the Account Number merge field in an email template, the syntax is

{! Account. AccountNumber }

Account → object, AccountNumber → fieldname.

11. click on "Save" button.

Creating Custom HTML Email Templates:-

For creating custom HTML Email Templates, go to the following path.

Your Name
↳ setup
↳ Administration Setup
↳ Communication Templates
↳ click on "Email Templates".
↓

1. click on "New Template" button.

2. choose Custom (without using Letterhead) and click "Next"

3. Choose a folder in which to store the template.

4. Select the "Available For Use" checkbox if we would like this template offered to users when sending an email.

5. Enter the "Email Template Name" and Template Unique Name.

6. Select an default Encoding setting to determine the character set for the template.

7. Enter a description of the template

↳ Select the Letterhead and Email layout.

8. click on "Next" button.

9. Enter the "Subject" to appear in the email we send.

10. Enter the HTML source text to appear in the message we

~~This should~~

send. This should include all the HTML tags.

Note: If we are including an image, we recommend uploading it to the Documents tab so that we can reference the copy of the image that is on server.

11. Optionally, enter merge fields in the template subject and body.

12. click "Next" button.

13. Optionally, enter the text-only version of email or click "Copy text from HTML version" to automatically paste the text from HTML version without the HTML tags. The text-only version is available to recepients who are unable to view HTML emails.

14. Click on "Save" button.

Note: click "Send Test and verify Merge Fields" to view a sample of the template populated with data from records we choose and send a test mail.

Workflow Rules:-

* The workflow rules allows us to automate the business processes for organization.
* Workflow rules provide benifits such as improving the quality and consistency of data, increasing data integrity, improving efficiency and productivity, lowering costs and reducing risks.
* Workflows allows us to automate the following types of actions:
  1. Email Alerts
  2. Tasks
  3. Field Updates and
  4. Outbound Messages.

Email Alert:-

An e-mail alert is an action that is sent to specified ~~xeeei~~ recipients using the e-mail templates. The recipients may be salesforce users or others.

Tasks:-

Tasks can be assigned to users or record owners automatically when the rule criteria meets. Workflow tasks provide the Subject, status, Priority and Due Date for the tasks a rule assigns.

~~Field Updates~~ -

~~Field update~~

* Tasks appear on the user's calendar which can be accessed by the "My Tasks" section of the Home tab.

*

Field Update:-

Field update is an action that will update the value of a field automatically. workflow Field Updates specify the field we want to update and the new value for it.

Depending on the type of field, we can choose to apply a specific value, make ~~a~~ the value blank, or calculate a value based on a formula we create.

Outbound Message:-

Outbound Message is an action that sends a secure, configurable API message (in XML format) to a external systems.

Note:- The workflows rules are triggered upon the clicking of 'Save' button.

Types of workflows:-

There are two types of workflows.

1. Immediate workflows

2. Time-Dependent workflows.

Immediate workflows:-

In this kind of workflows the workflow actions will execute immediately whenever a record meets the conditions specified in the workflow rule.

* Immediate actions trigger as soon as the evaluation criteria are met.

Time-Dependent workflows:-

In this kind of workflows the actions that queue when a record matches the criteria and execute according to time triggers.

Ex: Salesforce.com can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.

* Example of Immediate workflows is, salesforce.com can automattically send an email that notifies ~~that~~ the users when a new accound is created with status "Unvalidated Immediately.

Creating workflow Rules :-

The following steps are required to create a workflow rule.

1. Select the object
2. Select the Evaluation Criteria and Rule Criteria.
3. Specify the workflow actions
4. Activate the workflow rule.

To Create a workflow rule, follow the path

Your Name ⟶ setup ⟶ App setup ⟶

Create ⟶ workflow & Approvals
↓
Workflow Rules
↓

The workflow Rules detail page shows a list of the current workflow rules along with various properties such as the associated object and whether the rule is active.

* From the workflow rules list page, ~~we~~ click on "New Rule" button.

Step 1 :- Select object (select any one object from drop-down values)

* Now click on "Next" button.

step 2: Configure workflow Rule.

↓

This page will use to select the evaluation ~~rule~~ Criteria and rule Criteria.

* In the Edit Rule section, we must enter a rule name and optionally, we can enter a description for the rule.

* Evaluation Criteria:- In the Evaluation Criteria section we can choose the appropriate criteria that cause the application to trigger the workflow rule.

The Criteria can be selected from the following three options.

1. When a record is Created, or when a record is edited and did not previously meet the rule Criteria

The rule is not re-triggered on record updates that do not affect the specified rule Criteria

For example, we have created the workflow rule by selecting ~~the~~ ~~for~~ this option and Record status = "Unvalidated" in the ~~evalu~~ Rule Criteria.

↓

This workflow will fire when the account is Created with record status = "Unvalidated".

(OR)

This workflow rule will get fire, when the existing records is updated with the Record status = "Unvalidated" (previously & the value is other than "Unvalidated").

2. Only when a record is Created.

↓

Choose this option to igore any subsequent updates to existing records as the rule will only ever run once when the record is created.

3. Every time a record is Created or edited.

↓

Choose this option to include new records inserts and updates to existing records. These action cause repeated triggering of the rule, as long as the record meets the criteria.

*** Note:- We can not add time-dependent actions to a rule if we choose the "Every time a record is created or edited" option.

Rule Criteria:-

In the Rule Criteria section, there are two ways of form- ~~ati~~ ulating the logic that is used to trigger the work- -flow rule.

1. Run this rule when Rule Criteria = "Criteria are met"

2. Run this rule when Rule Criteria = 'formula evaluates to true'.

Run this Rule when Rule Criteria = "Criteria are met".

This option is displayed by default and allows us to select the Field from the drop down values and select the operation from the list of values and give the value.

Ex:

	Field	Operator	Value
1	Close Date	equals	TODAY()
2	closed	not equal to	True.

The "Add Row" link allows us to add more criteria options where upto a maximum of 25 can be added.

* Give the Filter Criteria logic, this allows us to use boolean expressions to set the criteria.

Ex: 1 OR 2 | 1 AND 2

In this case, the criteria ~~are~~ are met will be true when any one of criteria is true

In this case, the criteria are met will be true when both criterias is true.

Run this Rule when Rule Criteria = "formula evaluates to true"

This option allows us to enter a formula that returns a value of "True" or "False". The 'Sfa' application triggers the rule if the formula returns "True".

* Check Syntax

→ click on the "check Syntax" button to validate that the formula contains no error ~~~~ before progressing beyond this page.

* click on "Save & Next" button.

Step 3:- Specify workflow Actions.

↓

This page which allows us to configure the workflow actions.

Adding Immediate Workflow Actions:-

To add an immediate workflow action, click on "Add workflow Action" drop-down selection in the Immediate workflow Actions section and choose either

New Task, → to create a task to associate with rule.

New Email Alert → to create an e-mail alert

New Field update → to define a field update

New Outbound Message, or

"Select Existing Action" to select an existing action to associate with the rule.

to define an outbound message to associate with the rule.

Configuring tasks for workflow Rules:-

To Configure tasks for workflows,

click Your Name → set up → App setup → Create → workflow & Approvals → workflow Rules.

↓

~~So~~ click on particular Rule Name

↓

Click on "Edit" button on workflow Actions section.

↓

1. click on "Add workflow Action" button and select "New Task" ~~bo~~ option from the drop down list.
2. Select an assignee, An assignee can be ~~inf~~ in the form of a user, role and record owner.
3. Enter a Subject for the taskand Unique name for the task.
4. Choose a due date, status, and priority where due dates appear in the time zone of the assignee.
5. Set the "Notify Assignee" checkbox to send an e-mail notification when the task is assigned.
6. The "protected Component" checkbox is used to mark the alert as protected
7. Optionally, enter any Comments for the description information that is included with the task and then click on "Save".

* Go to "Assignee User" login and check this task in "My Tasks" section by clicking on "Home" tab.

Configuring e-mail alerts for workflow Rules:-

To Configure e-mail alerts for workflow rules, follow the steps below.

Click Your Name → Setup → App setup → Create → workflows & Approvals → workflow Rules

↓

Click on particular workflow Rule Name

↓

Click on "Edit" button on "workflow Actions" section

↓

1. Click on "Add workflow Action" button and select "New Email Alert" option from the drop down list.
2. Enter a description for the e-mail alert.
3. Enter a unique name for the e-mail alert

(The unique name for the e-mail alert is required and used by the API and managed packages. The name is auto-populated when we enter the preceding field called description.

4. Choose an e-mail template. (Creation of e-mail template will be discuss in up coming pages)

5. The "protected Component" checkbox is used to mark the alert as protected.

6. Now select who should receive this e-mail alert from the available options.

~~R Receip~~ Recipients : select "Account Owner" from the drop-down list

↓

* If the Account owner is selected then the e-mail alert is sent to the user who is set as account owner of the account record.

* Recipients : Account Team

↓

If the "Account Team" selected, then we have to choose from the list of users that are assigned to a particular account team role. (Note: E-mail alerts are only sent when the rule is associated with the account object).

* Recipients : Creator

↓

This is the user listed as the record creator and is the user who is set in the Created By field.

* Recipients : Email field

↓

An e-mail address field on the selected object, such as the Email field on Contact records or a custom e-mail field.

* Recipients : Owner
↳ The record Owner.

* Recipients: Public Groups
↓
Choose from the list of users in a particular public group.

* Recipients: Role
↓
Choose from the list of users assigned a particular role.

* Recipients : Role and Subordinates
↓
chose from the list of users in a particular role, plus all users in roles below that role.

* Recipients: User
↓
Choose from the list of available users in Salesforce CRM.

7. Select the recipients who should receive this e-mail alert in the "available Recipients" list and click on "Add".

8. Enter up to five additional recepients e-mail address (which may or may not be users in Salesforce).

9. Set the "From Email Address" to either the Current user's e-mail address or to the default workflow user's e-mail address.

10. Click on "Save" button

Configuring field Updates for workflows:-

To configure field updates for workflows click Your Name → Setup → App setup → Create → workflow & Approvals → workflow Rules
↓
Click on particular workflow Rule Name
↓
click on "Edit" button on workflow Actions Section
↓

1. click on "Add workflow Action" button and select "New Field Update" option from the drop down list.
2. Enter a Name and a unique name for the field update.
3. Now, optionally enter a description for the field update
4. Upon choosing the field to update, a new section called "Specify New Field Value" appears where we can set the logic of the desired field update.

Here, the available options depend on the type of field we are updating with following scenarios:

Checkboxes:-

For checkboxes, In specify New Field value section, choose "True" to select the checkbox and "False" to deselect.

Picklists:-

For picklist fields, ~~we~~ select "A specific value" checkbox from picklist options in Specify New Field Value section and choose the picklist value from the drop down list.

Other data types:-

For all other data types, we can set the following "Text options" as shown.

Follow these steps to finish the field update configuration.

* Choose A blank value (null) if we want to remove any existing value and leave the field blank.

* choose "Use a formula to set the new value" to calculate the value based on formula logic.

* click on 'Save' to complete the configuration of the field update.

Adding Existing Action:-

We can add existing action (i.e either ~~New~~ Task, or Email Alert, or Field update) directly from "select Existing Action" option. Following procedure gives the information about how to add Existing Action to the particular workflow.

click Your Name → setup → App setup → Create → workflow & Approvals → workflows
↓
click on particular workflow Rule Name
↓
click on "Edit" button on workflow Action's section.
↓
1. click on "Add workflow Action" button and choose "Select Existing Action" option from the drop down list.

2. In the select Existing Actions Page, choose Action Type and add the actions into selected Actions from the Available Actions by clicking on "Add" button.

3. click on "Save" button, to associate selected Actions to the workflow rule.

Adding Time-dependent workflow Actions:-

* To add a time-dependent workflow action, click on "Add Time Trigger" button in the Time Dependent workflow Actions section

* Then specify a number of days or hours before or after a date relevant to the record, such as the date the record was created or modified.

*** We can not add time trigger when the rule criteria is set to "Every time a record is created or edited".
(The "Add Time Trigger" button will be disabled for this criteria)

* And also the "Add Time Trigger" button is unavailable when the rule is already Active. (here we must deactivate it in order to apply the action).

* And also, the rule is deactivated, but has pending actions in the workflow queue.

Finally click,

Additional Immediate or time-dependent actions can be configured, and then finally click on the "Done" button on the top-right of the screen.

Activating the workflow rule:-

* The Salesforce CRM application will not trigger a workflow rule until we have manually activated it.

* To activate a workflow rule, Go to the workflow rule detail page and click on "Activate" link on ~~the~~ Action facet and click on "Deactivate" to stop a rule from triggering.

Monitoring the workflow queue:-

We can use the time-based workflow queue to monitor any outstanding workflow rule that has time-dependent actions.

In the following path, we can view pending actions and cancel them if necessary.

Your Name → setup → Administration setup → Monitoring

→ Time Based workflow

↓

~~Sel~~ Give the Criteria

↓

click on "Search" button to view all pending actions for any active time-based workflow rules that match the Criteria.

Understanding Cross-object Field Updates:-

For all custom objects and some standard objects, we can create workflow actions where a change to a detail record, that updates a field on the related master record.

* Cross-object field updates works for
  * Custom-to-Custom master-detail relationships
  * custom-to-standard master-detail relationships
  * standard-to-standard master-detail relationships

Ex: Create a workflow rule that sets the Active checkbox to true on opportunity (the master object) when a ~~top x designation~~ Designation (the detail object) is created with the status equal to "Active"

(The above example uses the creation of

1. Active (datatype = checkbox) on opportunity
2. Designation (Custom object)
3. status (datatype = picklist) on Designation object
   values: Active, Inactive.

* We can use cross-object field updates ~~from~~ for following cases

1. For all custom objects that are children of custom objects in master-detail relationship.

2. For all custom objects that are children of certail standard objects in master-detail relationship.

3. For standard objects that are children of standard objects in M-D relationship.

Configuring Cross-Object Field Updates:-

to configure cross-object field updates,

click Your Name → setup → App setup → Create → workflow & Approvals → click on Field updates.

↓

click on 'New Field Update' button.

↓

1. Enter name and unique name of a field update

2. Optionally, enter a description of a field update.

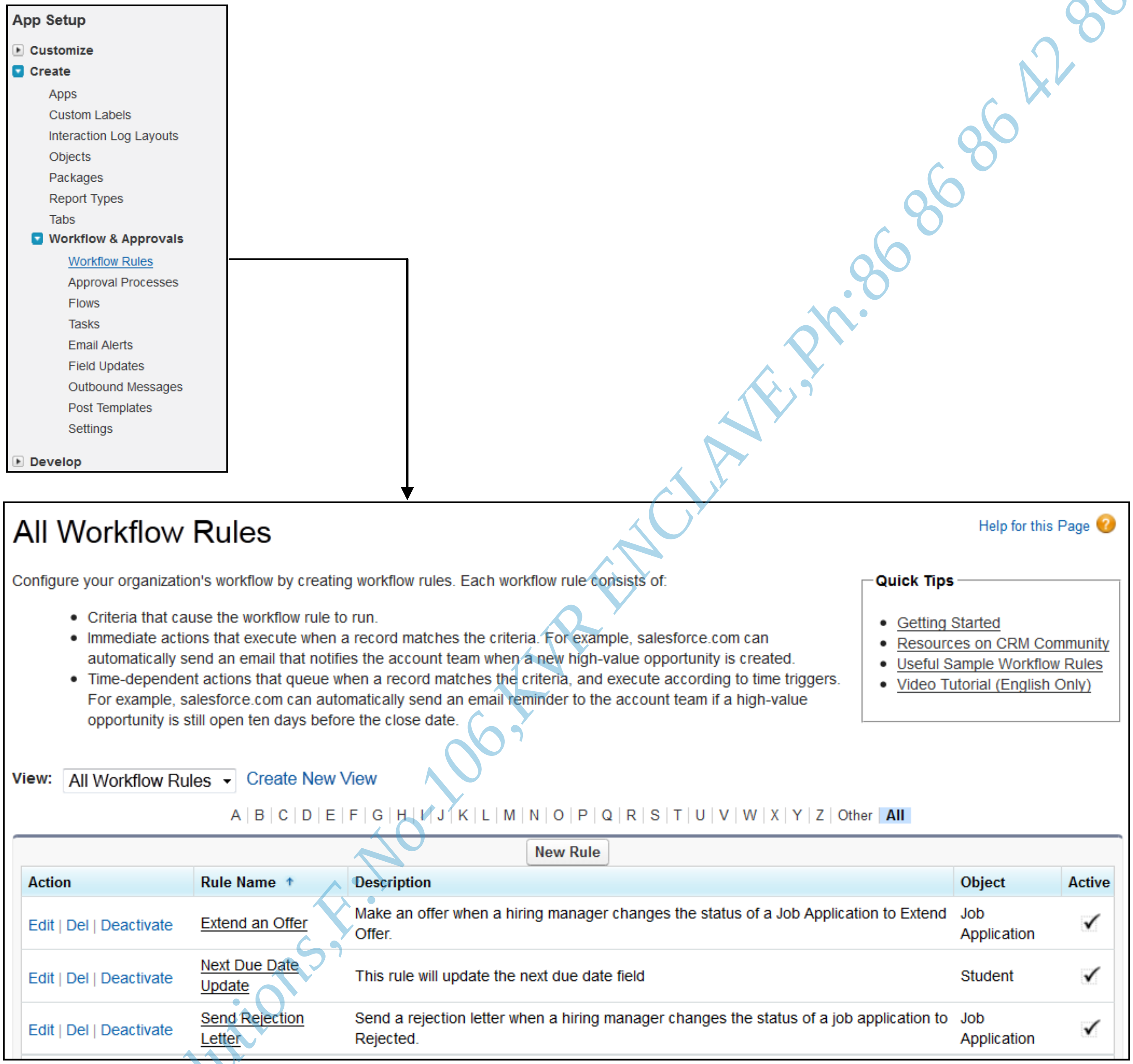
3. Select the detail object (i.e detail object in the M-D relationship).

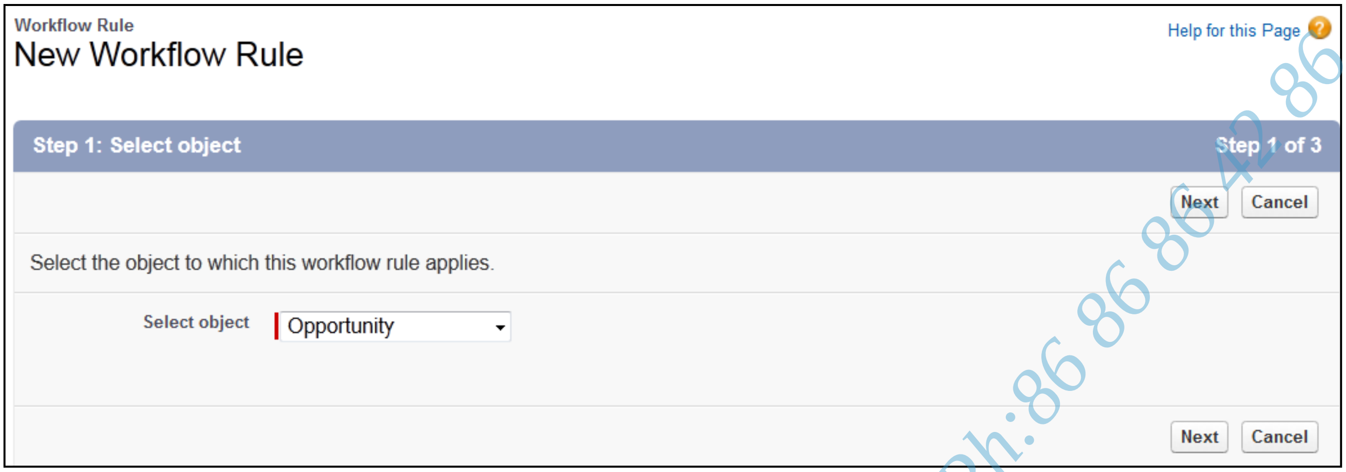
   Ex: Opportunity

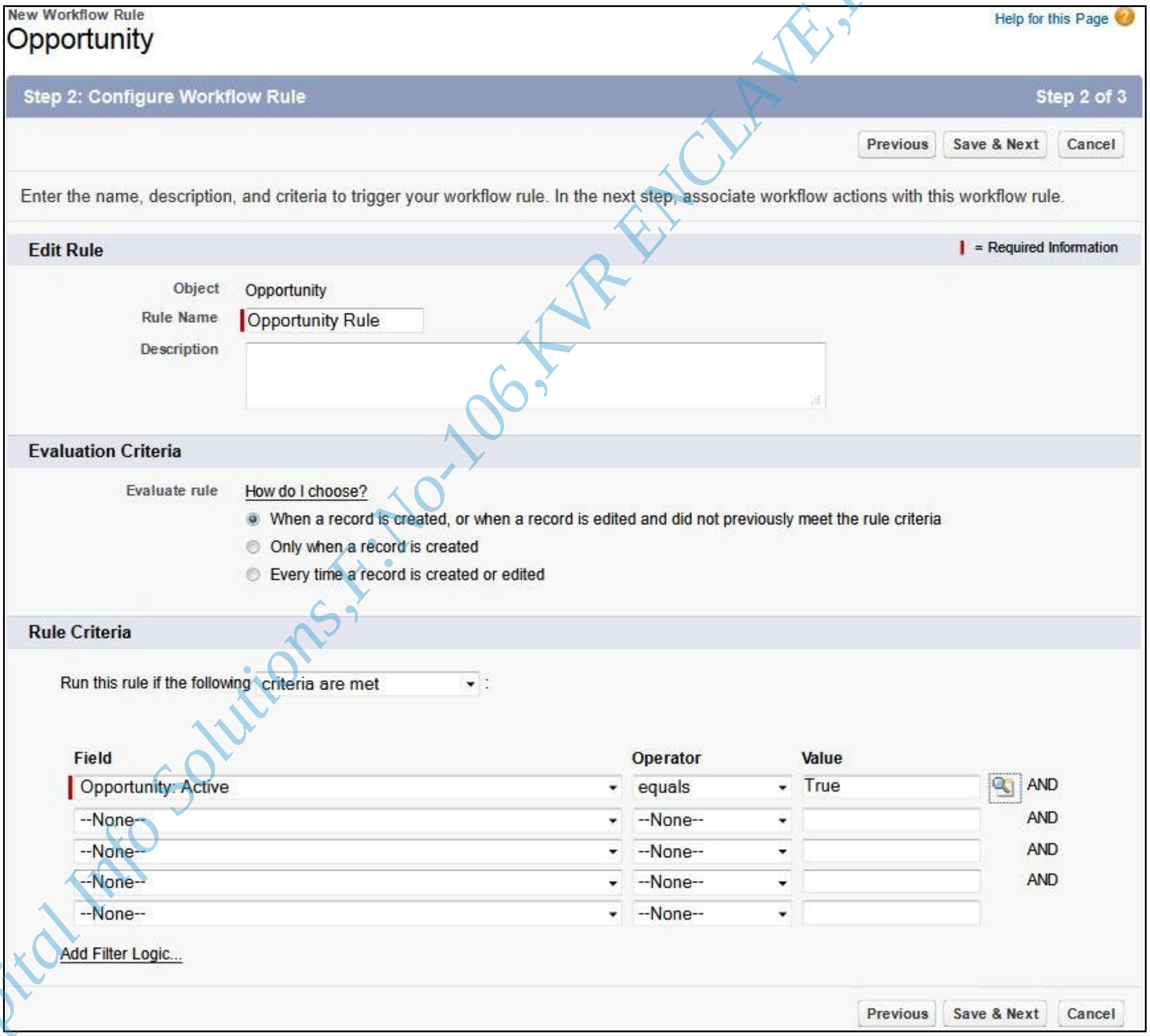
4. Once the detail object is selected "Field to update" will automatically populated with the master-object (Account) fields and ~~childre~~ detail-object (opportunity) fields.

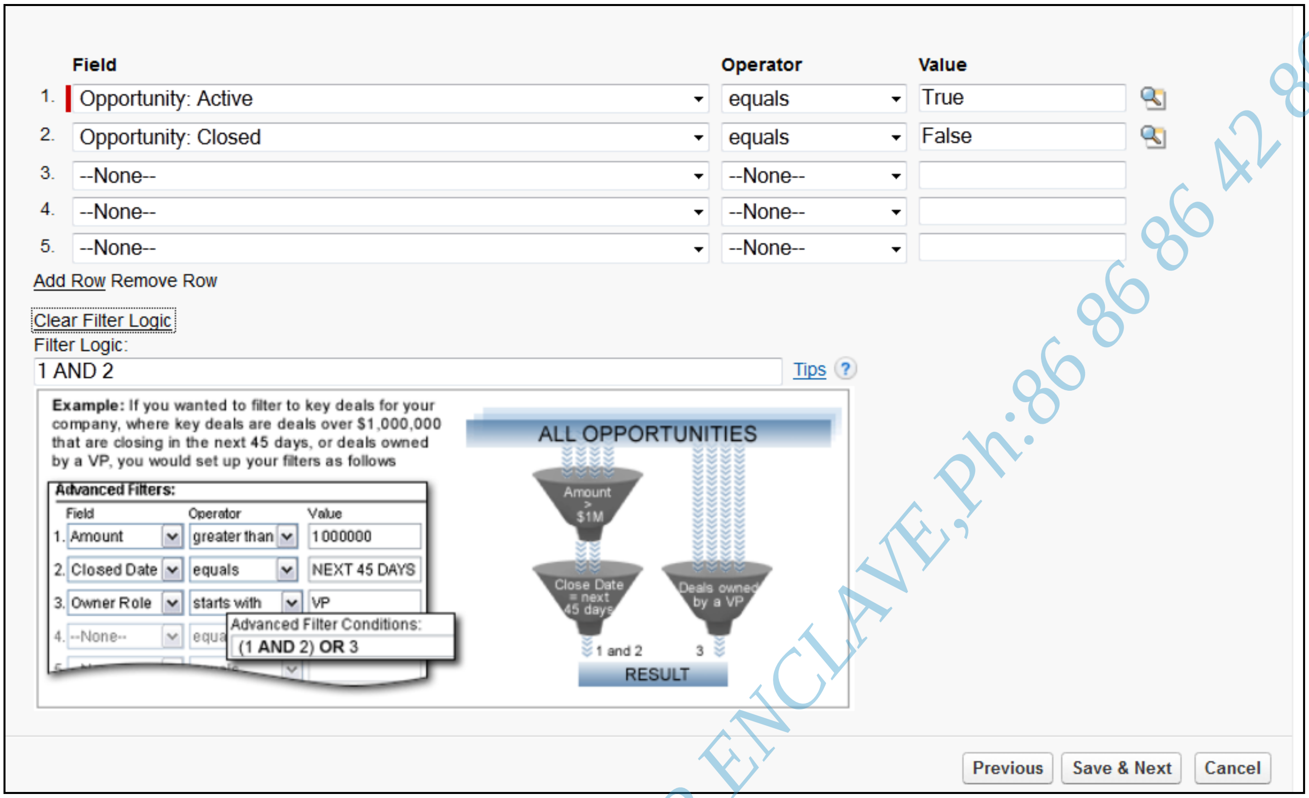
5. select the field, and "specify New field value" and click on "Save" button.

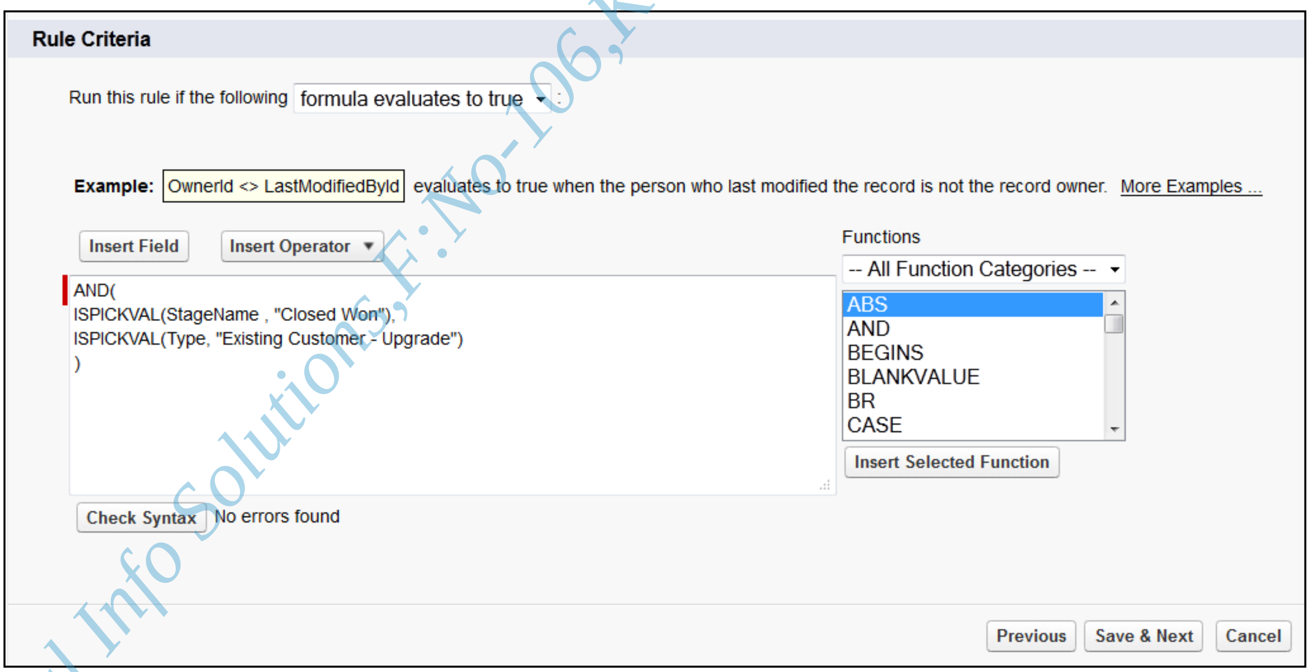
Workflows:

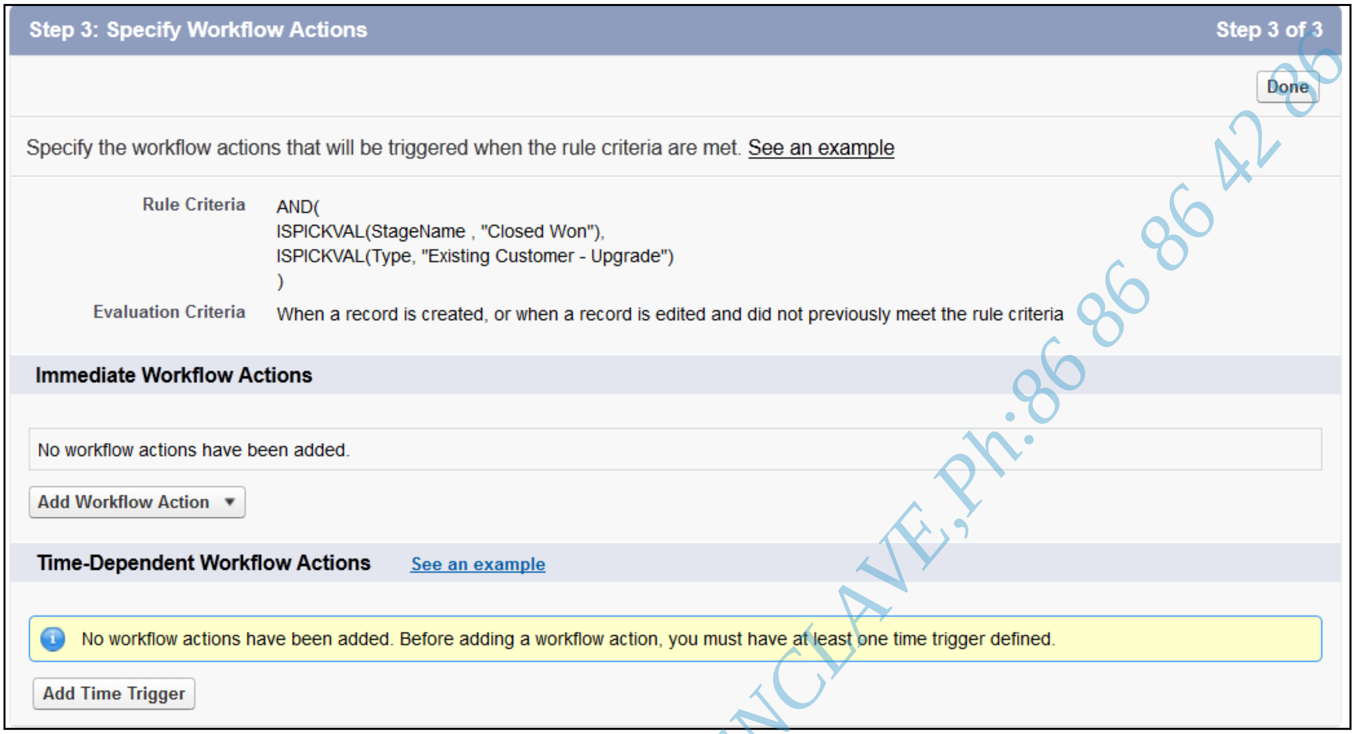

App Setup
Customize
Create
Apps
Custom Labels
Interaction Log Layouts
Objects
Packages
Report Types
Tabs
Workflow & Approvals
Workflow Rules
Approval Processes
Flows
Tasks
Email Alerts
Field Updates
Outbound Messages
Post Templates
Settings
Develop
All Workflow Rules
Help for this Page
Configure your organization's workflow by creating workflow rules. Each workflow rule consists of:
Criteria that cause the workflow rule to run.
Immediate actions that execute when a record matches the criteria. For example, salesforce.com can automatically send an email that notifies the account team when a new high-value opportunity is created.
Time-dependent actions that queue when a record matches the criteria, and execute according to time triggers. For example, salesforce.com can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.
Quick Tips
Getting Started
Resources on CRM Community
Useful Sample Workflow Rules
Video Tutorial (English Only)
View: All Workflow Rules
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
New Rule
Action
Rule Name
Description
Object
Active
Edit | Del | Deactivate
Extend an Offer
Make an offer when a hiring manager changes the status of a Job Application to Extend Offer.
Job Application
Edit | Del | Deactivate
Next Due Date Update
This rule will update the next due date field
Student
Edit | Del | Deactivate
Send Rejection Letter
Send a rejection letter when a hiring manager changes the status of a job application to Rejected.
Job Application


Workflow Rule
New Workflow Rule
Help for this Page
Step 1: Select object
Step 1 of 3
Next
Cancel
Select the object to which this workflow rule applies.
Select object
Opportunity
Next
Cancel

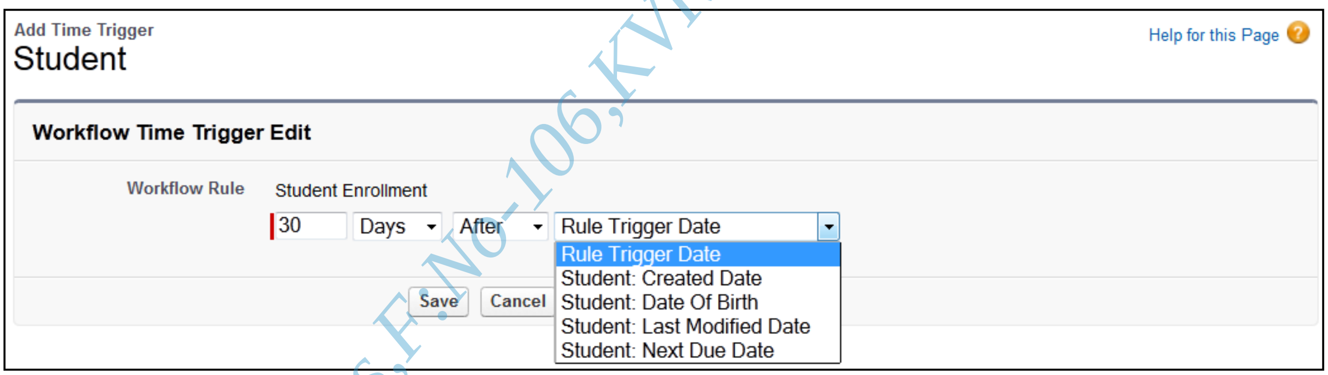

New Workflow Rule
Opportunity
Help for this Page
Step 2: Configure Workflow Rule
Step 2 of 3
Previous
Save & Next
Cancel
Enter the name, description, and criteria to trigger your workflow rule. In the next step, associate workflow actions with this workflow rule.
Edit Rule
= Required Information
Object
Opportunity
Rule Name
Opportunity Rule
Description
Evaluation Criteria
Evaluate rule
How do I choose?
When a record is created, or when a record is edited and did not previously meet the rule criteria
Only when a record is created
Every time a record is created or edited
Rule Criteria
Run this rule if the following
criteria are met
Field
Operator
Value
Opportunity: Active
equals
True
AND
--None--
--None--
AND
--None--
--None--
AND
--None--
--None--
AND
--None--
--None--
Add Filter Logic...
Previous
Save & Next
Cancel

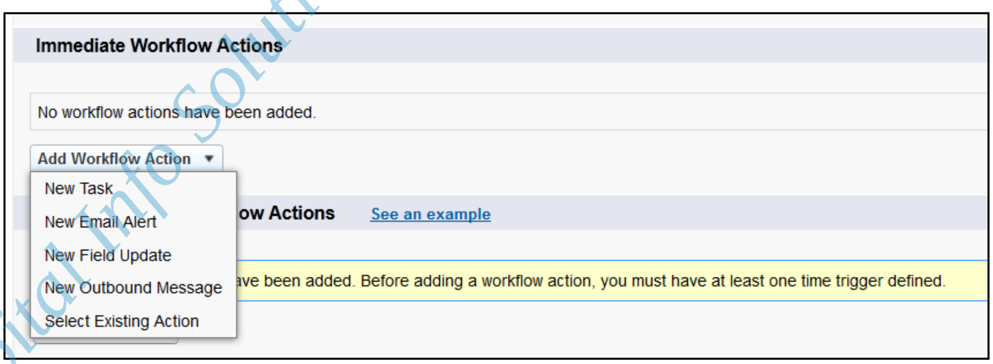

Field
Operator
Value
1. Opportunity: Active
equals
True
2. Opportunity: Closed
equals
False
3. --None--
--None--
4. --None--
--None--
5. --None--
--None--
Add Row Remove Row
Clear Filter Logic
Filter Logic:
1 AND 2
Tips
Example: If you wanted to filter to key deals for your company, where key deals are deals over $1,000,000 that are closing in the next 45 days, or deals owned by a VP, you would set up your filters as follows
Advanced Filters:
Field
Operator
Value
1. Amount
greater than
1000000
2. Closed Date
equals
NEXT 45 DAYS
3. Owner Role
starts with
VP
4. --None--
Advanced Filter Conditions:
(1 AND 2) OR 3
ALL OPPORTUNITIES
Amount > $1M
Close Date = next 45 days
Deals owned by a VP
1 and 2
3
RESULT
Previous
Save & Next
Cancel


Rule Criteria
Run this rule if the following
formula evaluates to true
Example:
OwnerId <> LastModifiedById
evaluates to true when the person who last modified the record is not the record owner.
More Examples ...
Insert Field
Insert Operator
Functions
-- All Function Categories --
AND(
ISPICKVAL(StageName , "Closed Won"),
ISPICKVAL(Type, "Existing Customer - Upgrade")
)
ABS
AND
BEGINS
BLANKVALUE
BR
CASE
Insert Selected Function
Check Syntax
No errors found
Previous
Save & Next
Cancel

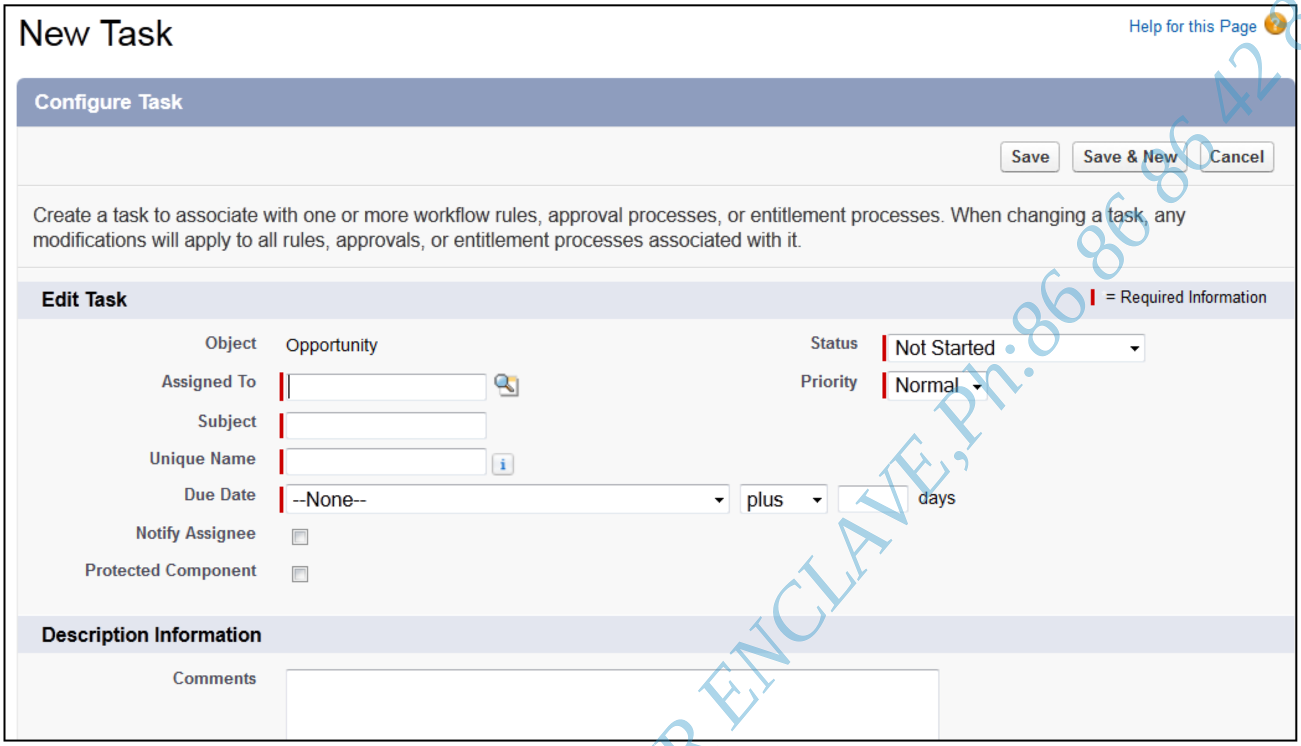


Click on the Add Time Trigger button to create Time - Dependent Workflow Actions

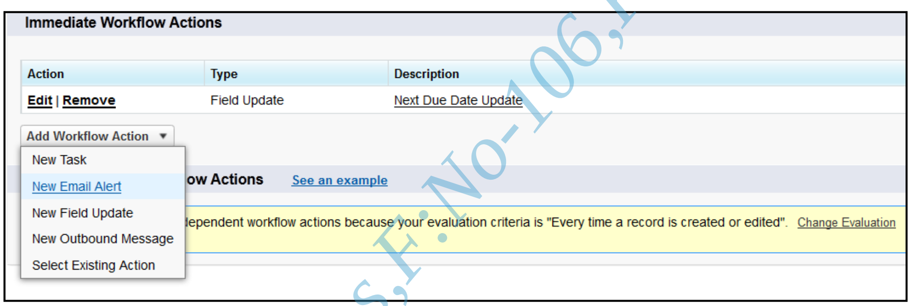


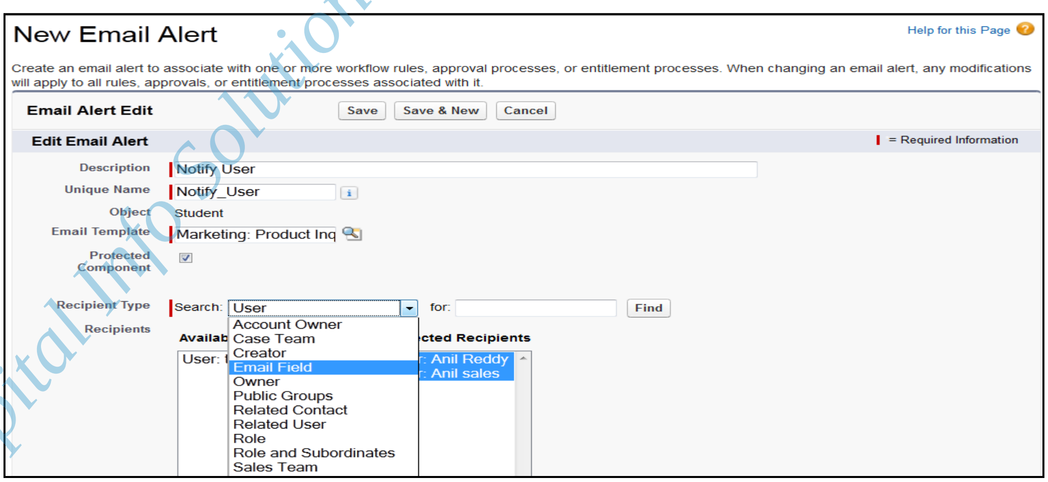


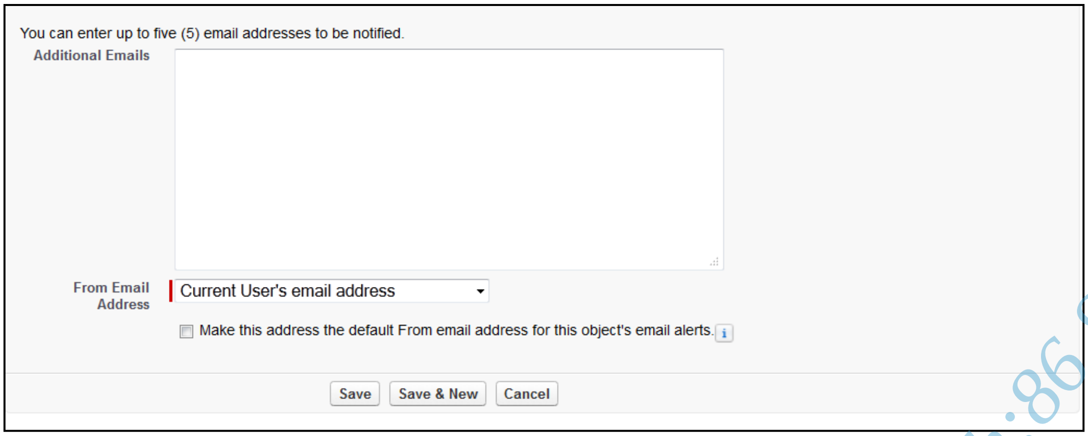
Configuring tasks for workflow rules:



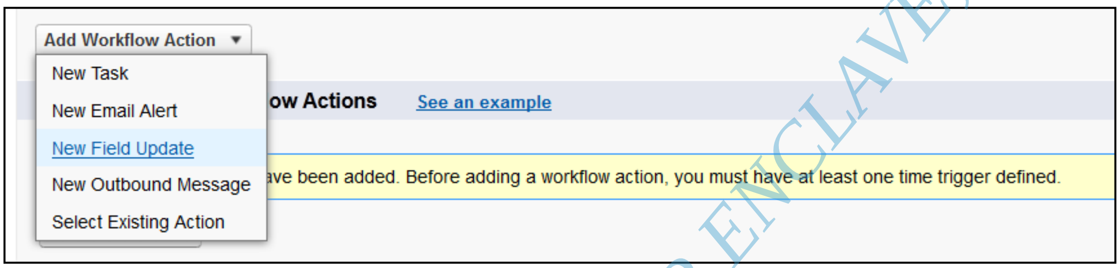
Configuring e-mail alerts for workflow rules:



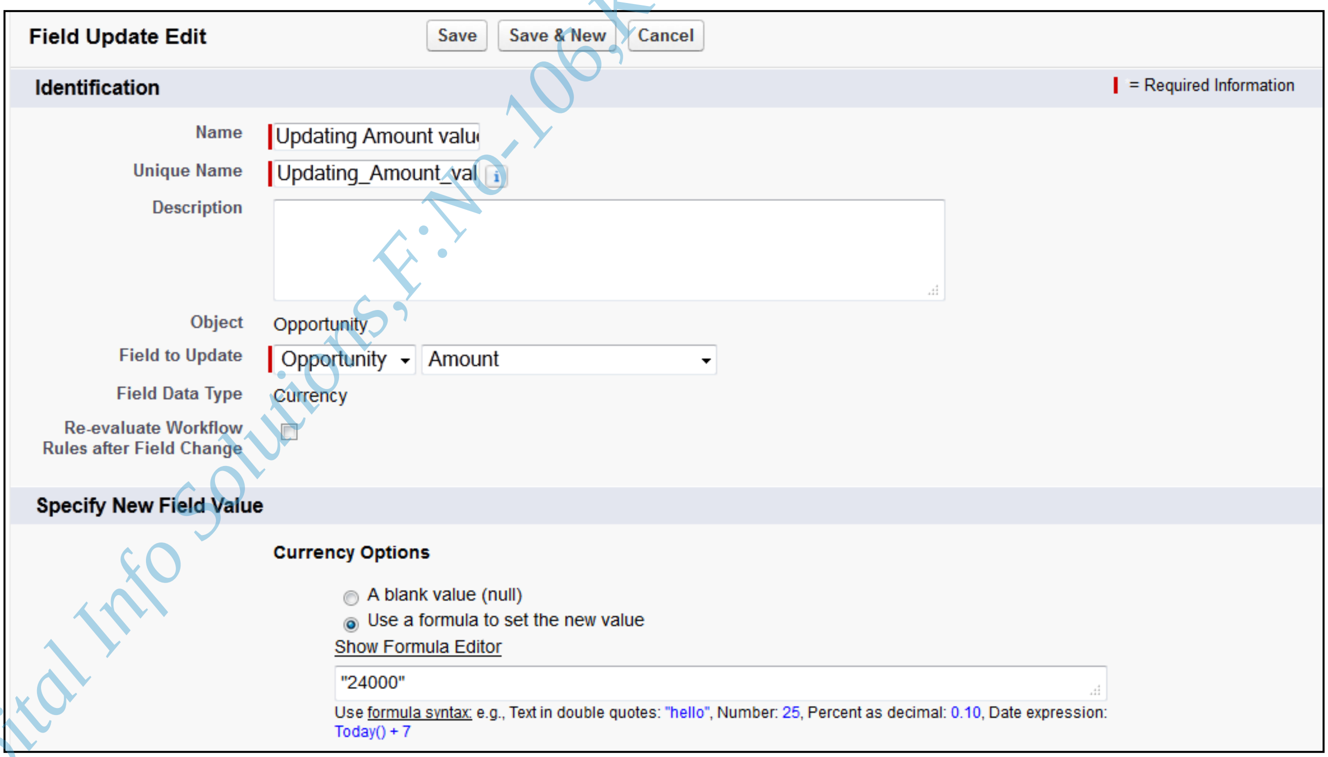




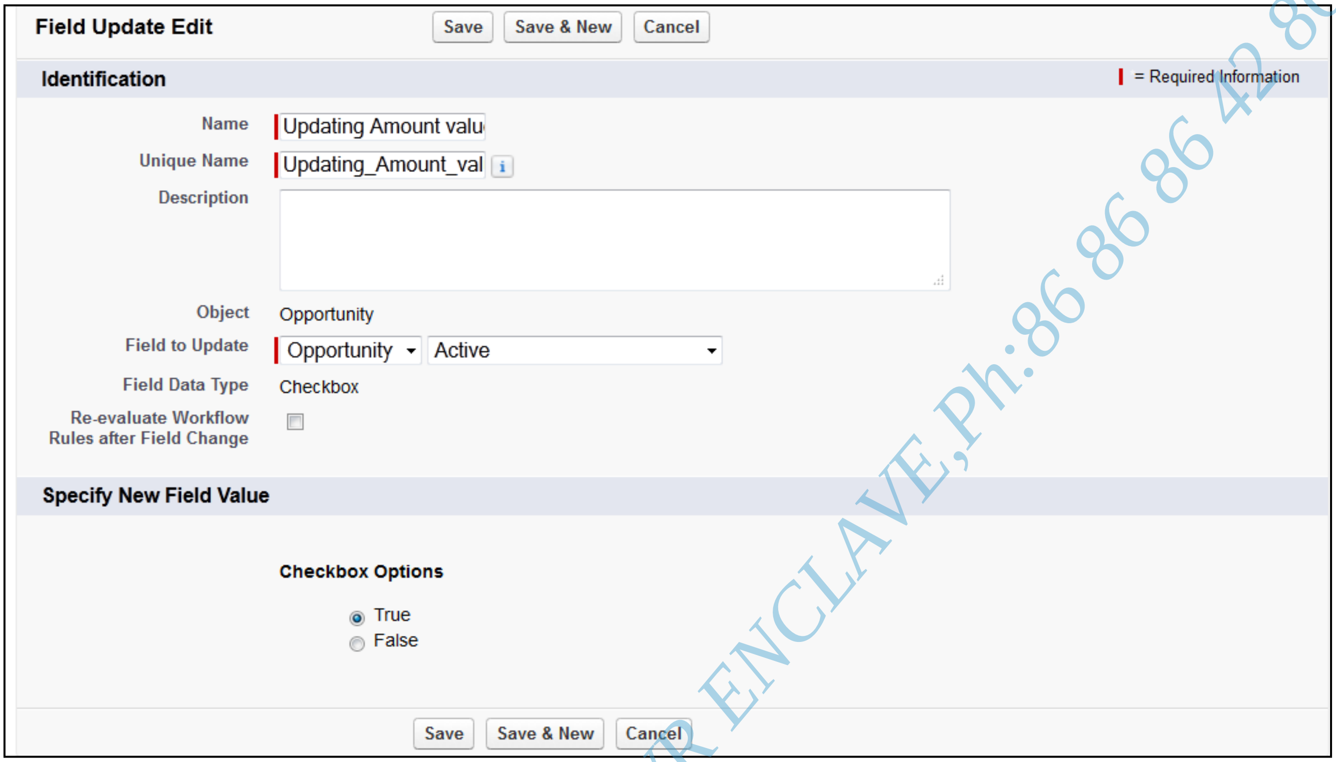
Configuring field updates for workflow rules



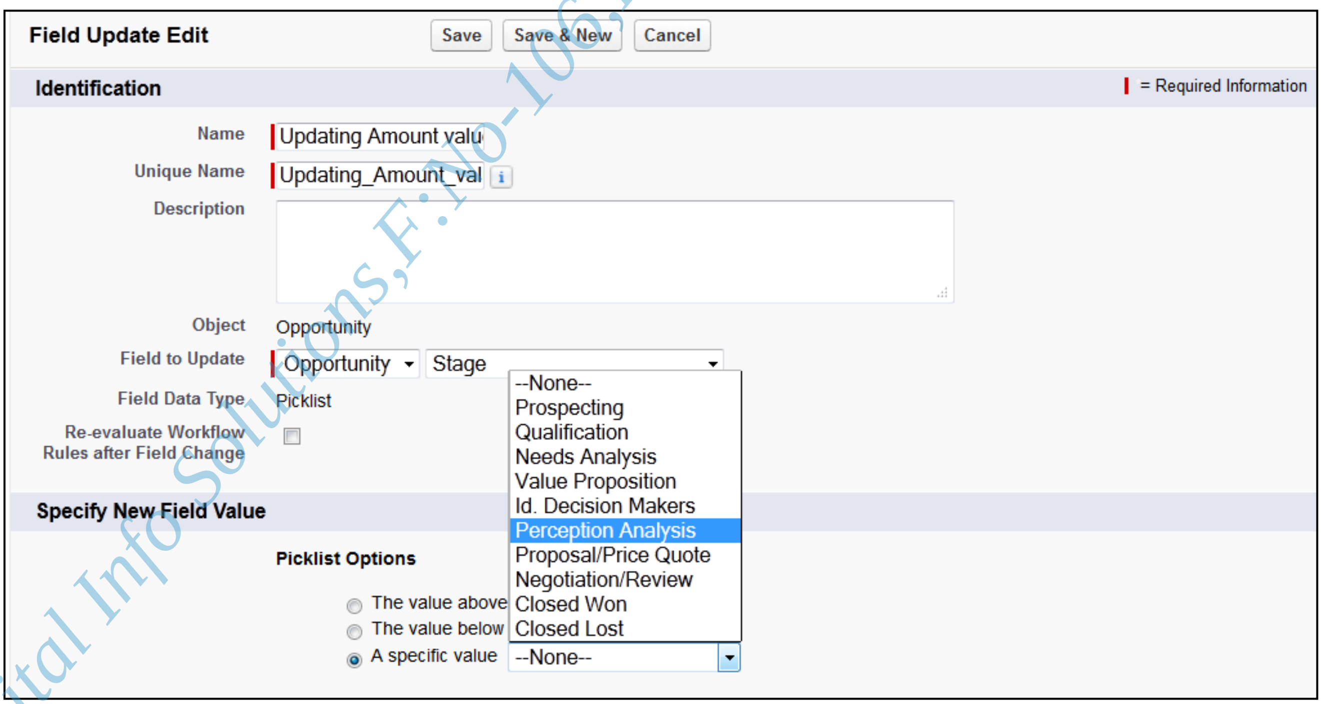
The following screenshot shows the updating Text and Number type of fields



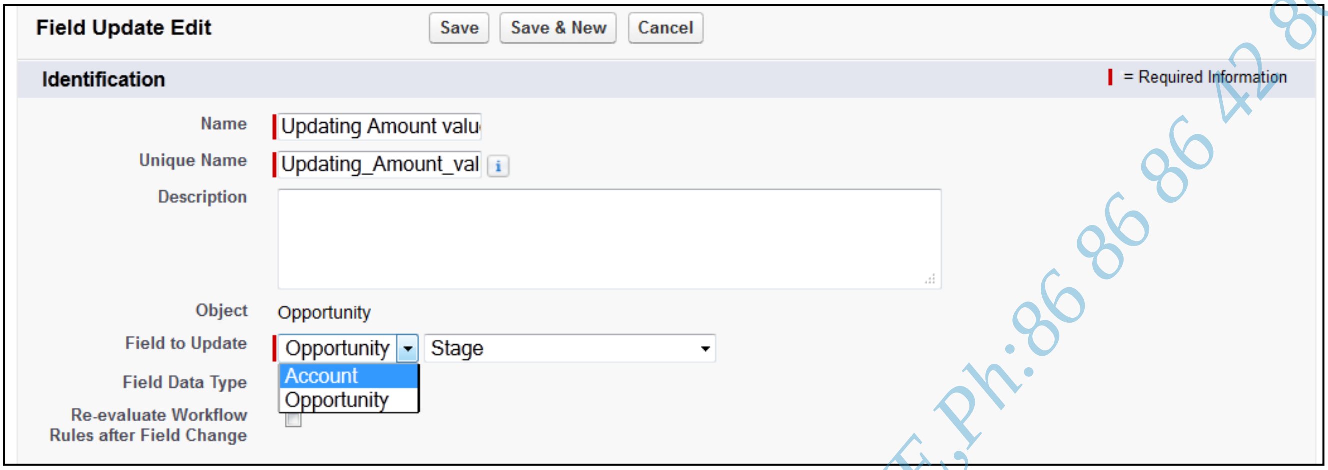
The following screenshot shows the updating Checkbox of fields



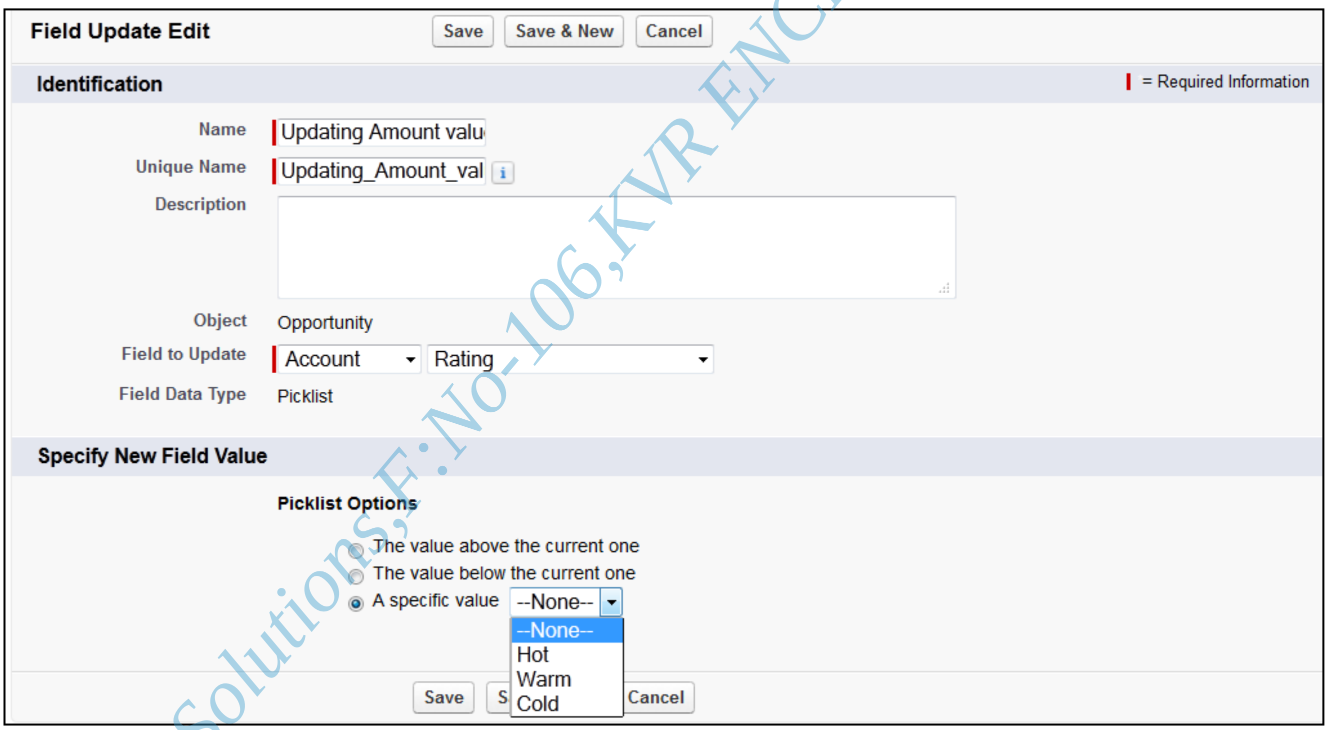
The following screenshot shows the updating Picklist type of fields



Cross -Obect Field Updates:



The following screenshot shows based on the criteria we mentioned on the Opportunity(Child record), we are updating the field update on the Account(Parent record)



Activating the workflow rule:

Go to the any Workflow rule detail page, Click on the "Activate" button

Workflow Rule Detail Edit | Delete | Clone | Activate

Rule Name	Opportunity Rule	Object	Opportunity
Active	☐	Evaluation Criteria	When a record is created, or when a record is edited and did not previously meet the rule criteria
Description			
Rule Criteria	AND(ISPICKVAL(StageName , "Closed Won"), ISPICKVAL(Type, "Existing Customer - Upgrade"))		
Created By	Anil Reddy, 20/5/2012 2:07 PM	Modified By	Anil Reddy, 20/5/2012 2:07 PM

Data Loader Overview:

Data Loader is an application for the bulk import or export of data. Data Loader is used to insert, update, upsert(insert+update), delete, or export Salesforce records.

When importing data, Data Loader reads, extracts and loads data from comma separated values (CSV) files When exporting data, it outputs CSV files

Important Points:

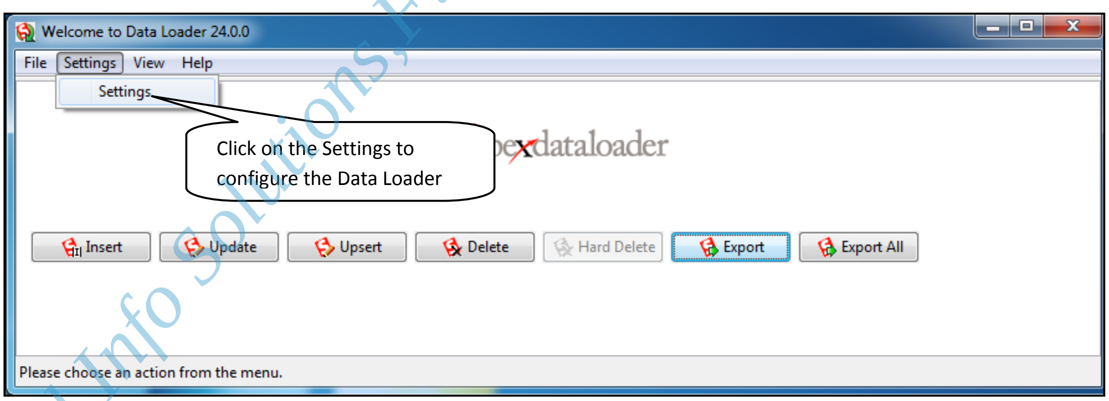
1. It Supports all the Standard Objects and Custom Objects
2. Supports upto 1 million records
3. Duplicates will be allowed in the Data Loader
4. Data Loader have batch size

Steps to be followed for Installing Data Loader:

1. Go to the following path to install the Data Loader. Your Name> Setup > Data Management > Data Loader.
2. Click "Download the Data Loader" and save the installer to your PC.
3. Double-click the downloaded file and click on Run to launch the InstallShield wizard.
4. Click on "Next" button.
5. Accept the license agreement and click "Next" button.
7. Click on "Install" button.
8. Click on "Finish" button.
9. To start Data Loader, double-click the Data Loader icon on your desktop.

Settings in Data Loader

Start Data Loader by double click on the Data Loader icon and Choose Settings > Settings



Batch Size: In a single insert, update, upsert, or delete operation, records moving to or from Salesforce are processed in increments of this size. The maximum value is 200. We recommend a value between 50 and 100. The maximum value is 10,000 if the Use Bulk API option is selected.

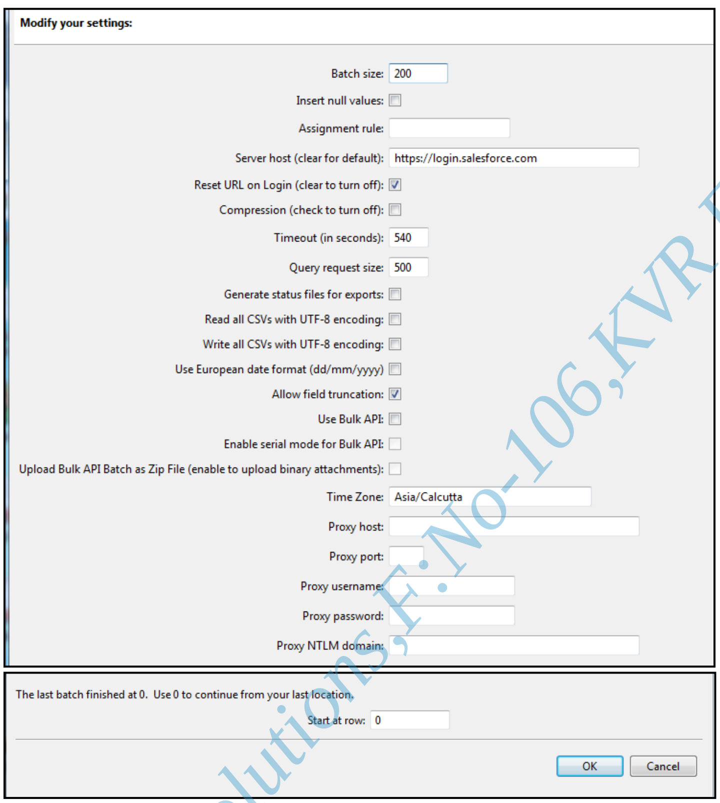
Insert null values: Check this checkbox to insert blank mapped values as null values during data operations. Note that when we are updating records, this option instructs Data Loader to overwrite any existing data in mapped fields.

Server host: Enter the URL of the Salesforce server with which we want to communicate. For example, if you are loading data into a sandbox, change the URL to https://test.salesforce.com.

Once you enter the Organization, we need to give following settings (Mandatory)

1. Proxy Host
2. Proxy Port
3. Proxy Username
4. Proxy Password

Click on "OK" button



The Data Loader Operations:

The Data Loader will do the following operations

1. Insert ---> This Operation is used for inserting records into salesforce

2. Update ---> This operation is used for updating the existing records in Salesforce.

3. Upsert ----> This operation is the combination of Insert and Update. This operation is used to inserting the records and updating the existing records in salesforce.

4. Delete ----> This opration is used for deleting the records from salesforce.

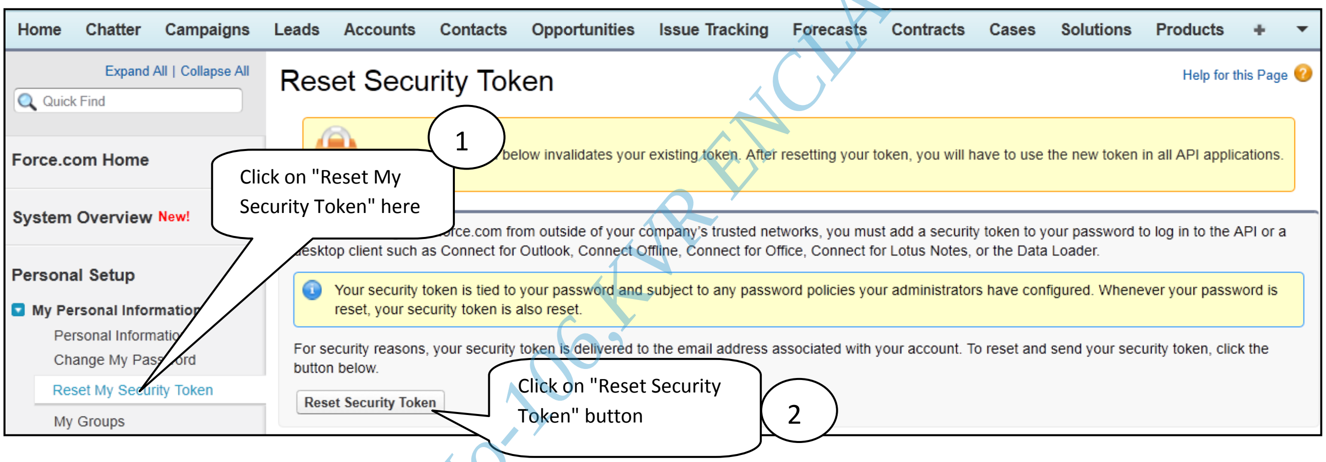
5. Export ----> This operation is used for extract all the records from salesforce into CSV files.

6. Export All ----> This operation is used for extract all the records from salesforce i.e including records in Recycle Bin also.

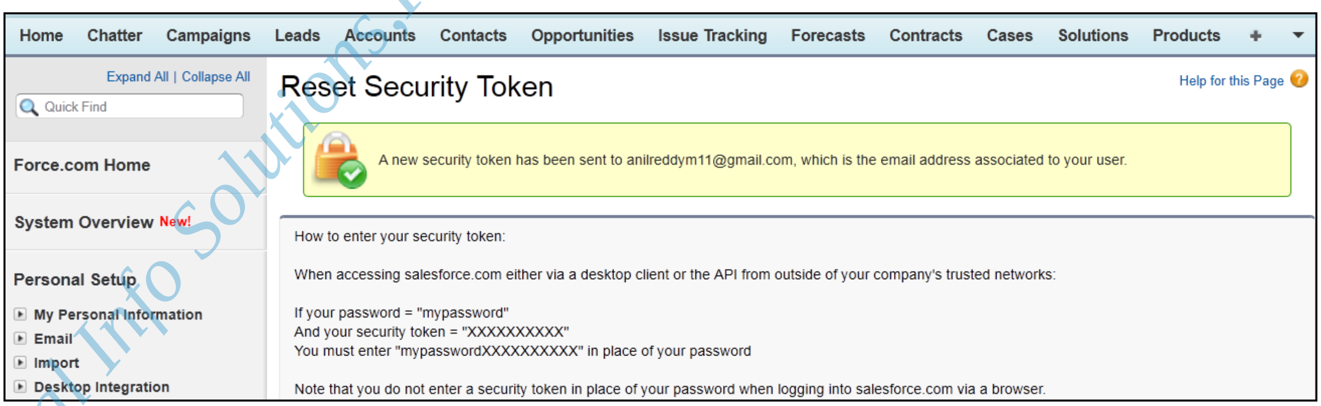
How to generate Security Token:

Go to the following path

Your Name ---> Setup--->Personal Setup--->My Personal Information---> Click on Reset My Security Token

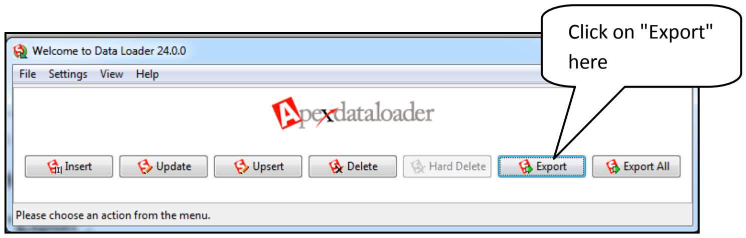


Once the "Reset Security Token" button is clicked, a new security token has been sent to email address associated to user.



Procedure for "Export" operation using Data Loader:

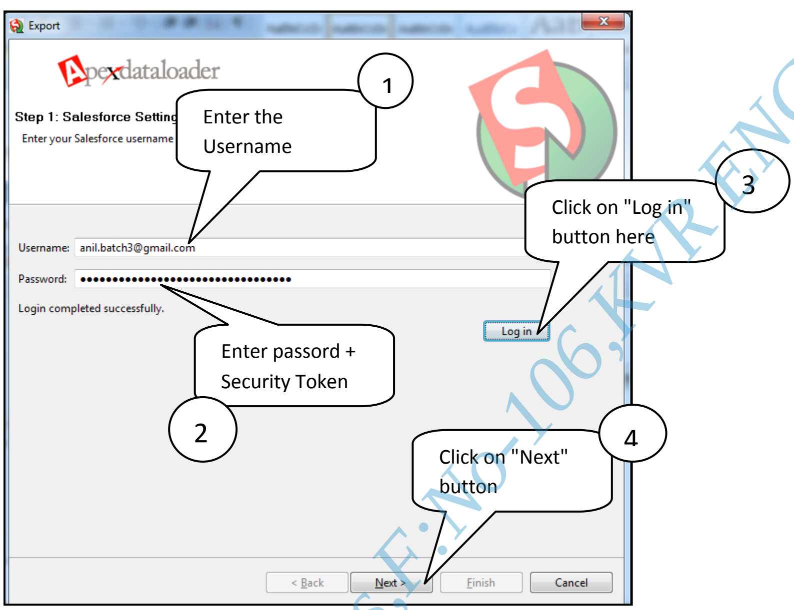
1. Click on "Export".



2.

Step 1: Enter salesforce Username and Password. Click "Log in" button to log in. This is applicable when your network ip address added to Trusted IP Ranges. Otherwise, here the password is equal to Password + Security Token.

For example, if password is mypassword, and security token is XXXXXXXXXX, we must enter mypasswordXXXXXXXXXX to log in.

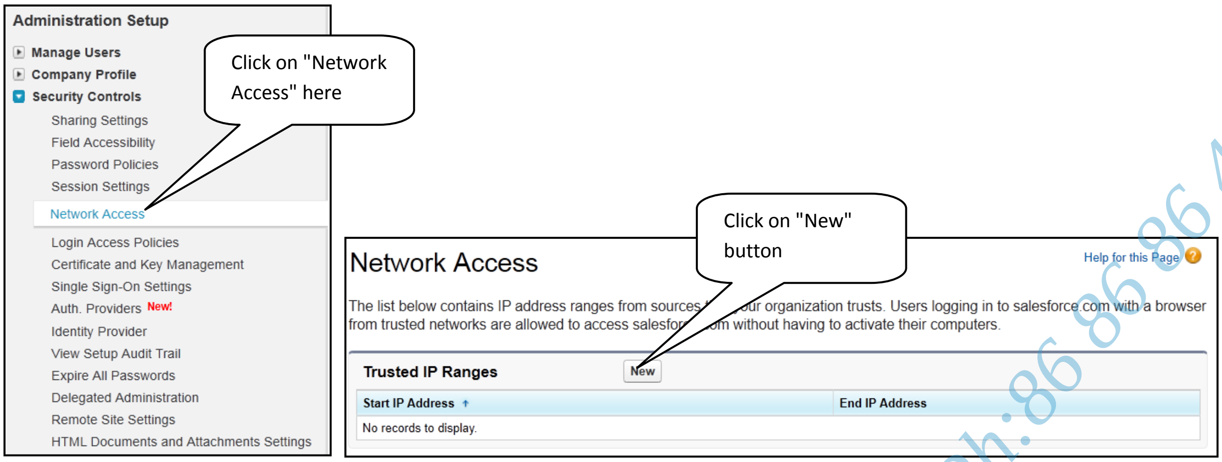


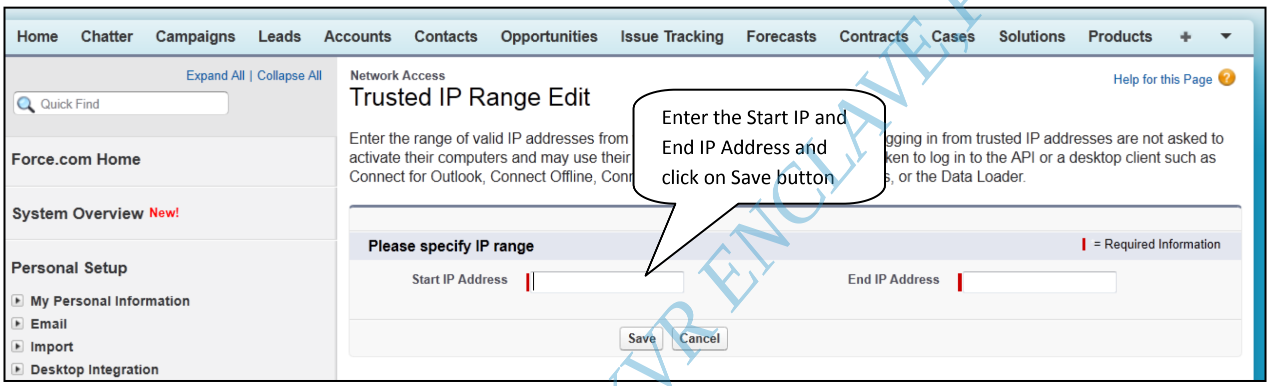
How to add IP address to Trusted IP Ranges:

Go to the following path

Your Name ---> Setup---> Administration Setup---> Security Controls ---> Network Access---> Click on "New" button

Enter the Start IP Address and End IP Address i.e The users who are logging with this IP range will have to enter only password. The users no nedd to enter Security Taken while accessing the Data Loader.





3.

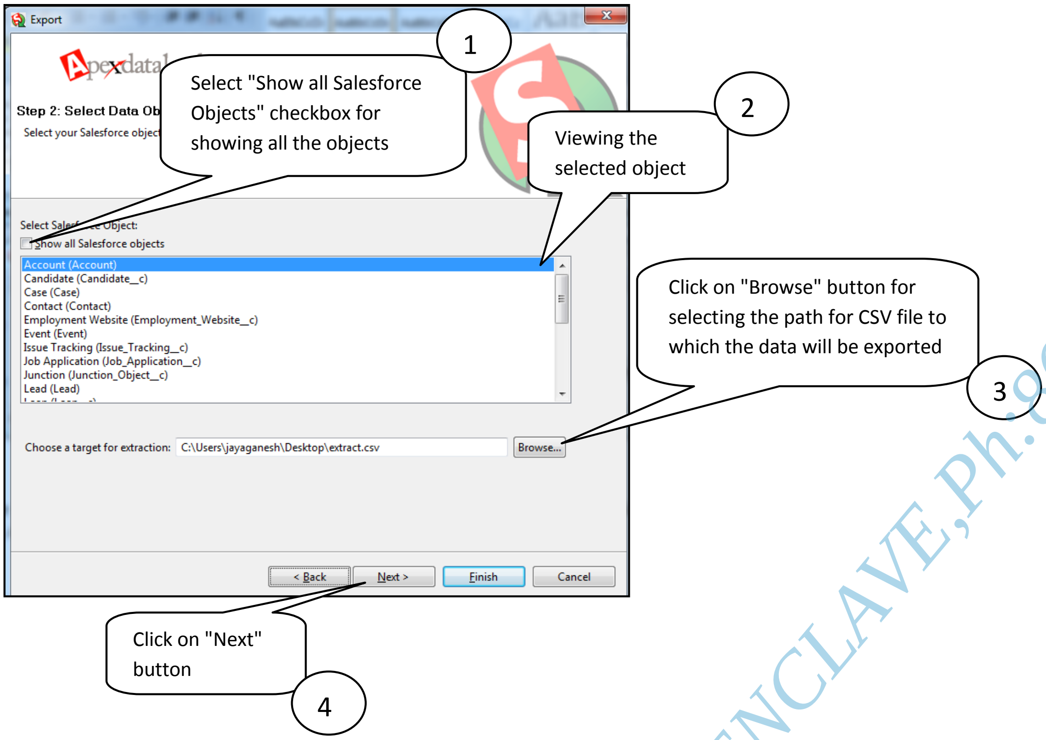
Step 2:Select Data Objects

Choose an object. For example, select the Account object. If object name does not display in the default list, check "Show all Salesforce objects" to see a complete list of objects that we can access.

Click "Browse" button, to select the CSV file to which the data will be exported. We can enter a new file name to create a new file or choose an existing file.

If we select an existing file, the contents of that file are replaced. Click "Yes" to confirm this action, or click "No" to choose another file.

Click on "Next" button

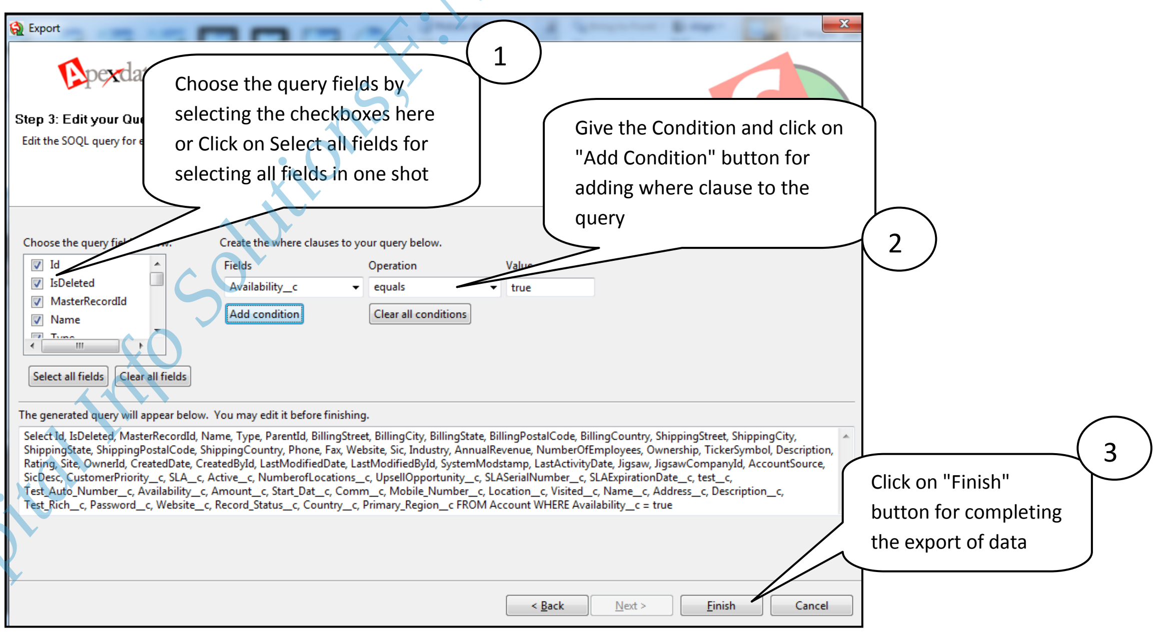


4.

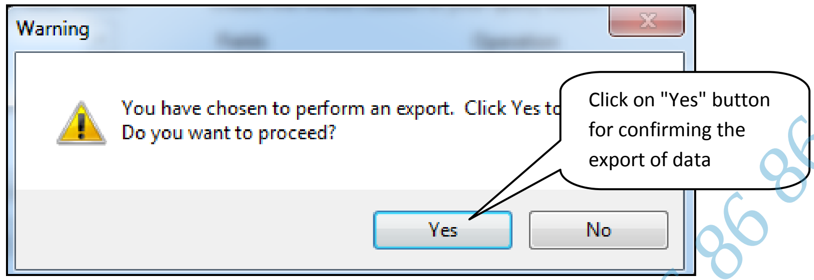
Step 3: Edit the SOQL query for extraction

Select the fields we want to export. or Click on "Select all fields" button to select all the fields in the query. Review the generated query and edit if necessary.

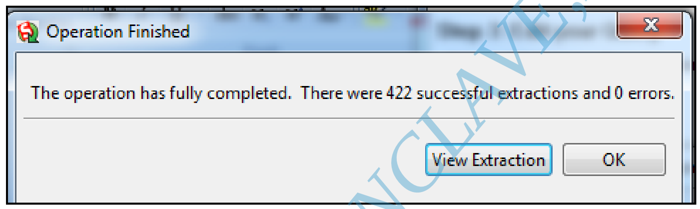
Optionally, select conditions to filter the data set. If don't select any conditions, all the data to which we have read access will be returned.



Click on the "Finish" button and then Click on "Yes" button to confirm the export.

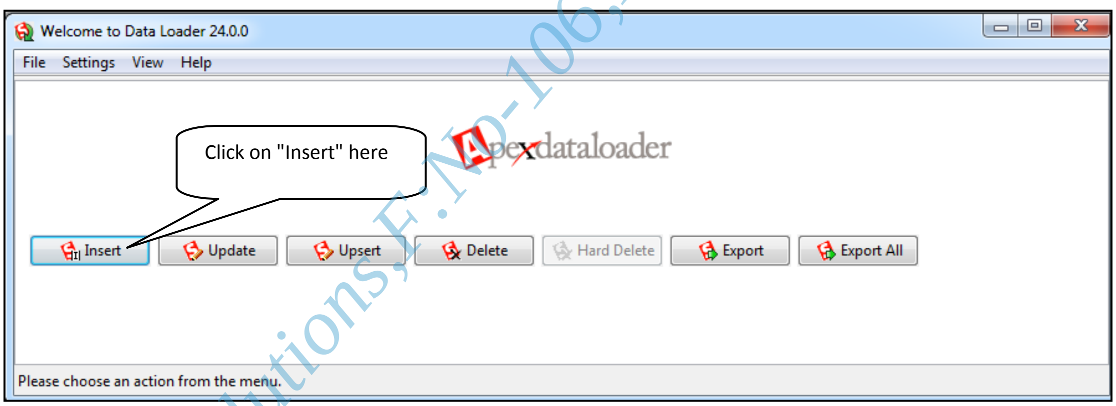


After the operation completes, a confirmation window summarizes results. Click "View Extraction" to view the CSV file, or click OK to close.



Procedure for "Insert" operation using Data Loader:

1. Double click on Data Loader icon at your desktop and Click on "Insert" operation for loading the records into salesforce.com



Step 1: Salesforce Settings

This step consists of Entering username, password and clicking on "Log in" button to login into data loader and clicking on "Next" button similar to above screenshots mentioned in the Procedure for "Export" operation using Data Loader Section.

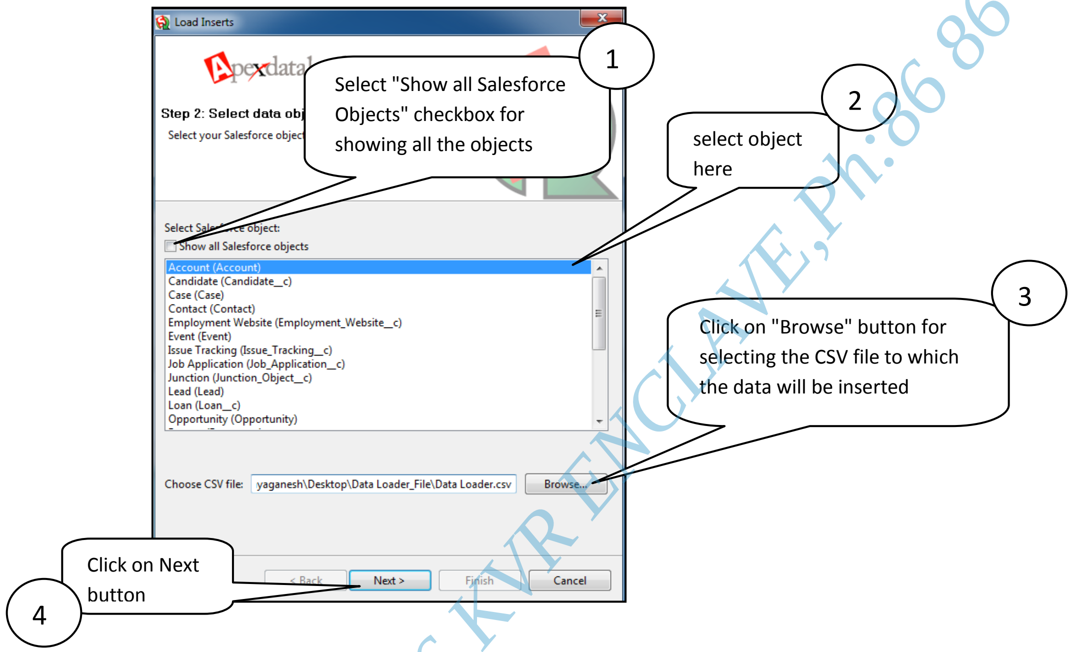
Step 2: Select data Objects

Select Salesforce object and csv file

Choose an object. For example, select the Account object. If object name does not display in the default list, check "Show all Salesforce objects" to see a complete list of objects that we can access.

Click "Browse" button, to select the source CSV file from the computer for inserting records into salesforce.

Click on "Next" Button

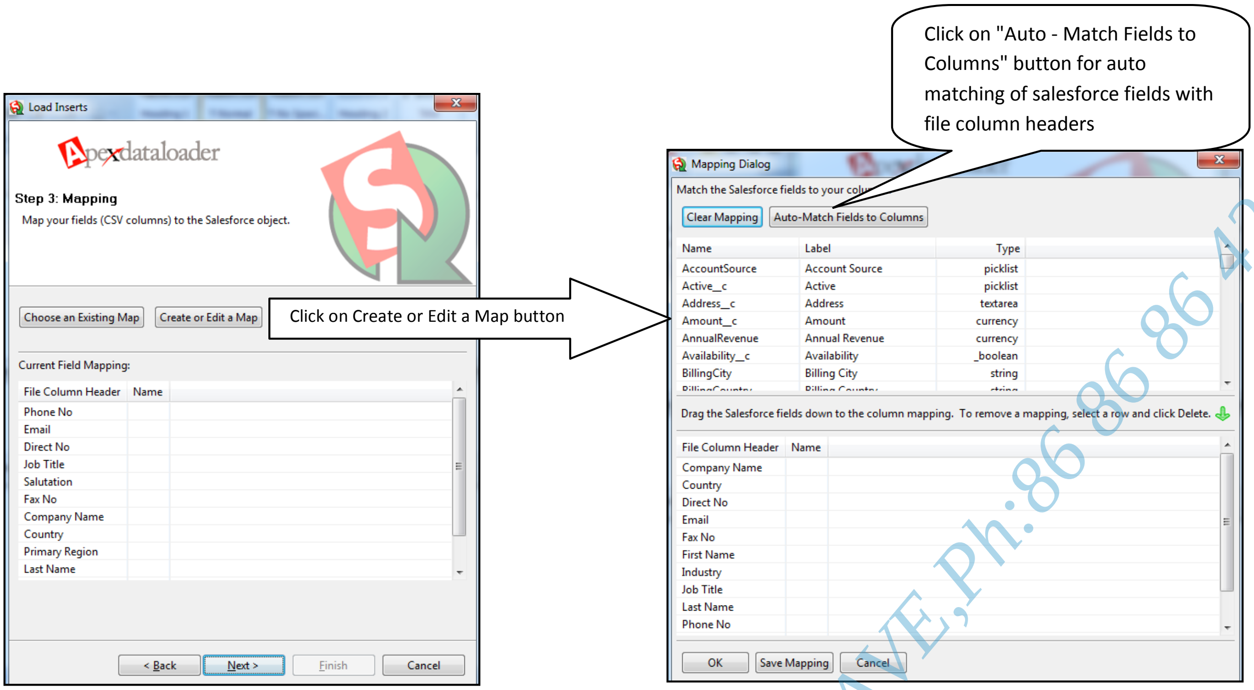


Once we clicked on the "Next" button, small popup window will say about how many records the operation will contains. Click on "OK" button

Step 3: Mapping

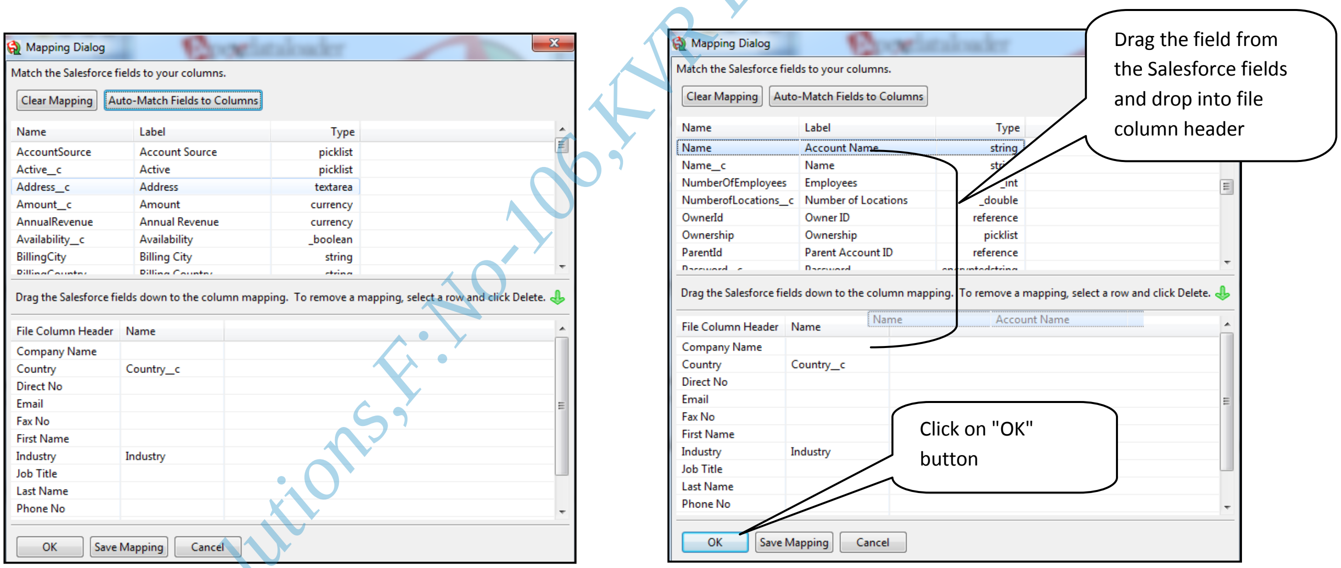
Map fields(CSV columns) to the fields in the Salesforce object

Click on "Create or Edit a Map" button for mapping of fields.



Click on "Auto Match Fields to Columns" button for mapping of salesforce fields and CSV file columns having the same name automatically.

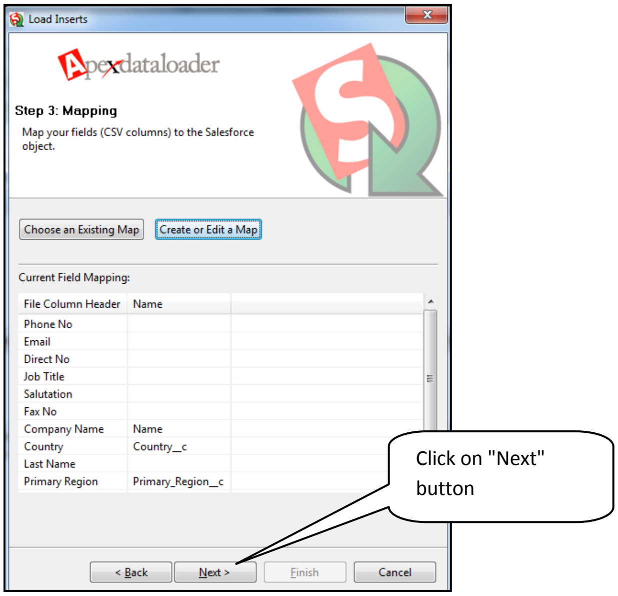
The Mapping can also done by dragging the salesforce fields to the File column Header section



The Mapping can also done by dragging the salesforce fields to the File column Header section. The above right screen gives the information about the dragging the salesforce fields to the file column section

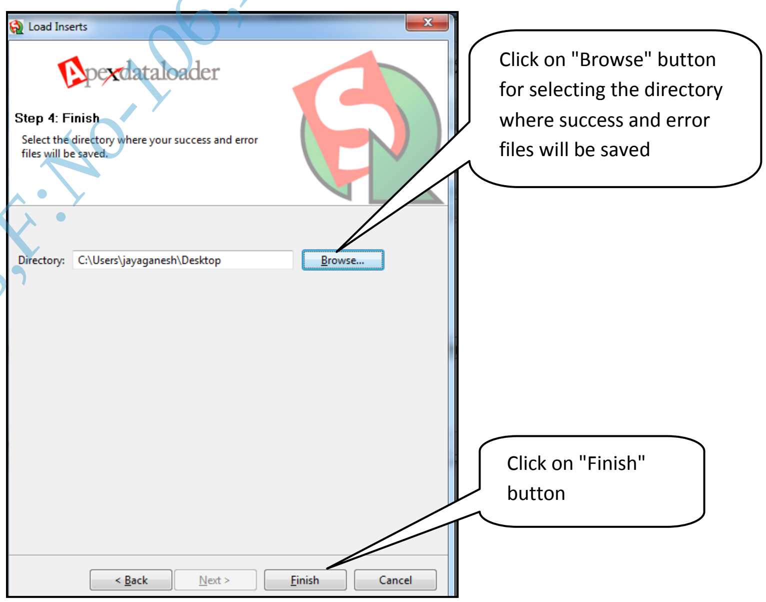
After completing mapping of fields, click on "OK" button

Click on "Next" button in the following screen shot

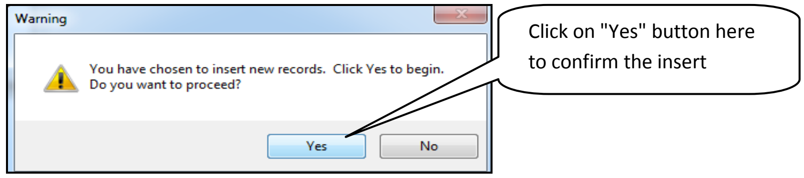


Step 4:

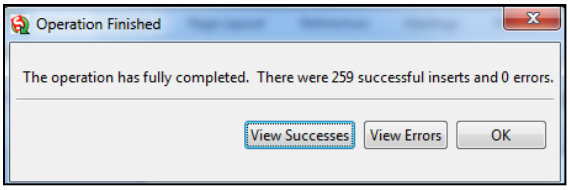
Click on "Browse" button for selecting the directory where success and error files will be saved. Click on "Finish" button.



Click on "Yes" button to confirm the insert.



The following window shows the successful inserts and errors after loading completed.

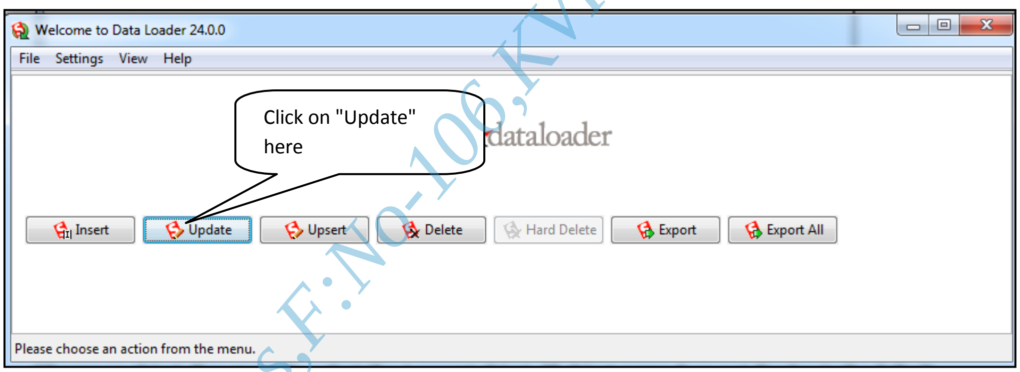


Procedure for "Update" operation using Data Loader:

Update --->This operation is used for modifying the existing records.

Note: For updating the existing records, we need Salesforce record ID(15 digits or 18 digits)

1. Double click on Data Loader icon at your desktop and Click on "Update" operation for loading the records into salesforce.com



Step 1: Salesforce Settings

This step consists of Entering username, password and clicking on "Log in" button to login into data loader and clicking on "Next" button similar to above screenshots mentioned in the Procedure for "Export" operation using Data Loader Section.

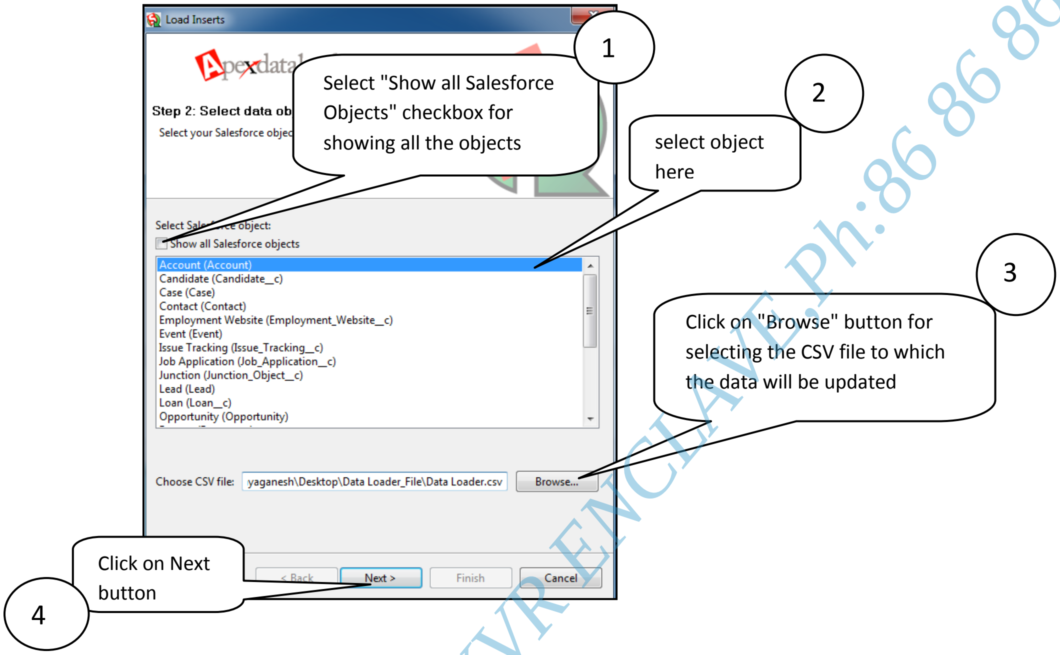
Step 2:

Select Salesforce object and csv file

Choose an object. For example, select the Account object. If object name does not display in the default list, check "Show all Salesforce objects" to see a complete list of objects that we can access.

Click "Browse" button, to select the source CSV file from the computer for updating records into salesforce.

Click on "Next" Button



Above Mentioned, the Step 1, Step 2 in the update operation which is similar to Insert Operation

Step 3: Mapping

Same procedure as mentioned in the Insert operation.

Note: While mapping, make sure that the field ID is mapped with the file column header in the CSV file.

Step 4:

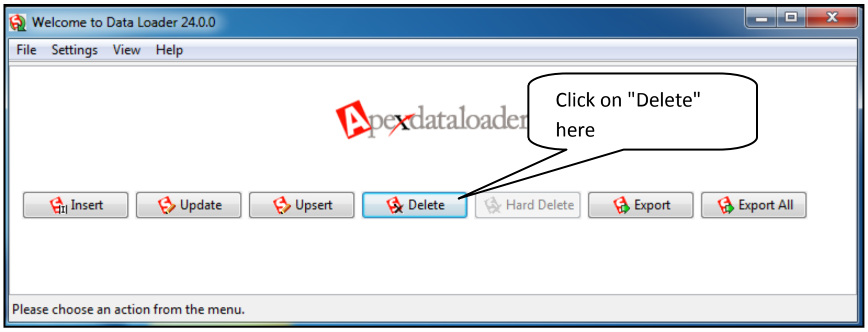
Same procedure as mentioned in the Insert operation.

Procedure for "Delete" operation using Data Loader:

Delete --->This operation is used for deleting the existing records from salesforce.com.

Note: For deleting the existing records, we need Salesforce record ID(15 digits or 18 digits)

1. Double click on Data Loader icon at your desktop and Click on "Delete" operation for deleting the bulk records from salesforce.com



Step 1: Salesforce Settings

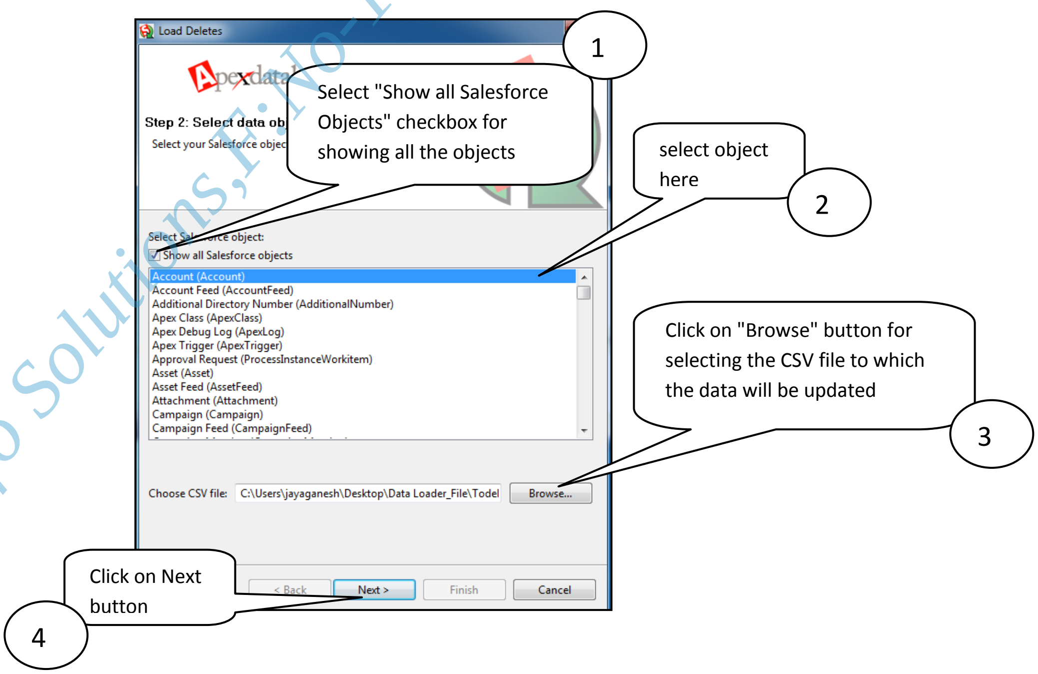
This step consists of Entering username, password and clicking on "Log in" button to login into data loader and clicking on "Next" button similar to above screenshots mentioned in the Procedure for "Export" operation using Data Loader Section.

Step 2: Select the Data Object and CSV file.

Choose an object. For example, select the Account object. If object name does not display in the default list, check "Show all Salesforce objects" to see a complete list of objects that we can access.

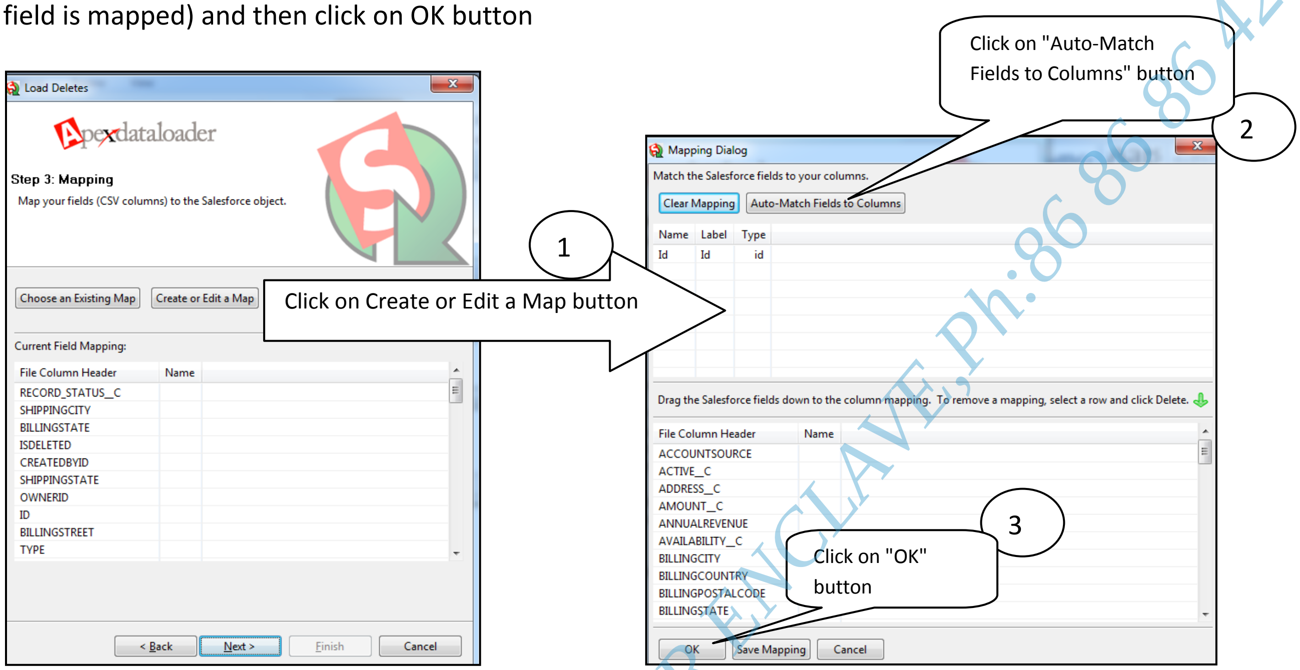
Click "Browse" button, to select the source CSV file from the computer which contains records which we want to delete from salesforce.(Make sure that your CSV contains Id column)

Click on "Next" Button



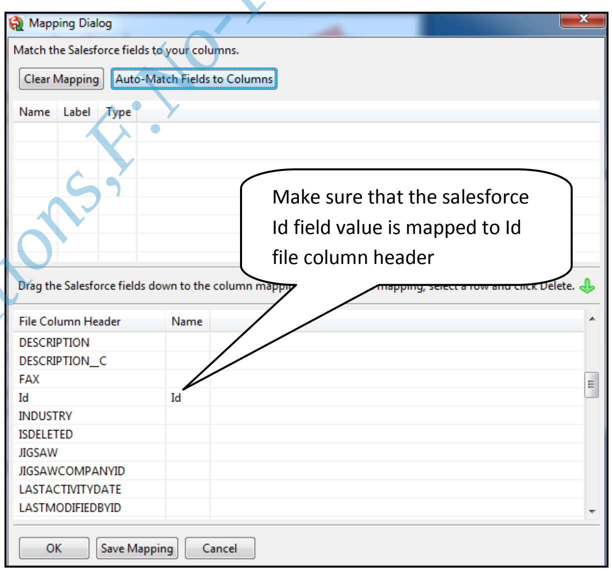
Step 3: Mapping

In this step, map fields(CSV columns) to the salesforce object. Click on "Create or Edit a Map" button for doing the mapping and then click on the "Auto Match Fields to Columns" button(Make sure that the Id field is mapped) and then click on OK button



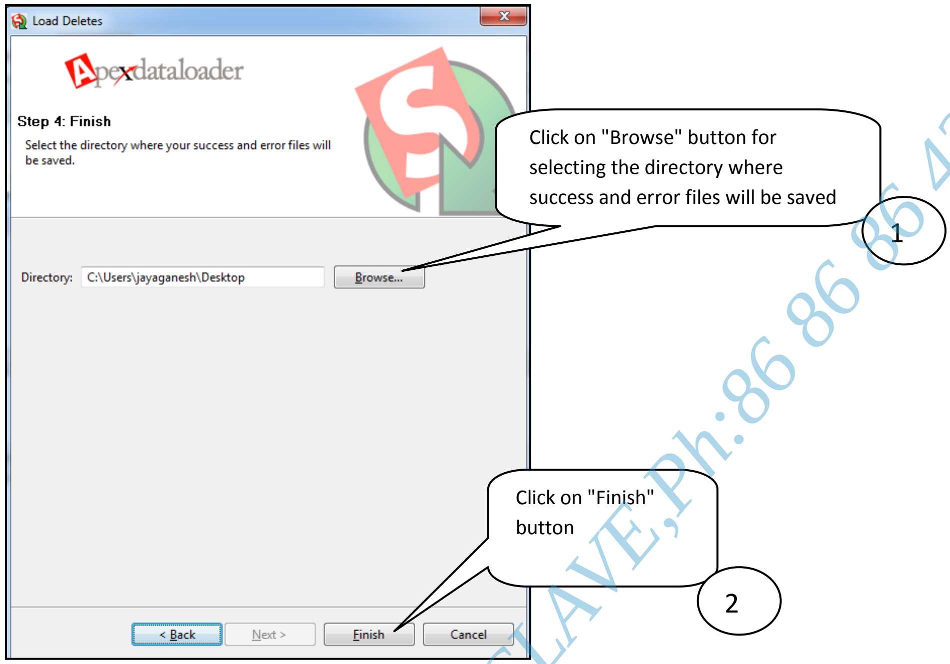
The following screen shot shows once we click on "Auto Match Fields to Columns" button, the Id field in Salesforce object is automatically mapped to Id field in the file column header.

Click on "OK" button and Click on "Next" button in the Mapping window

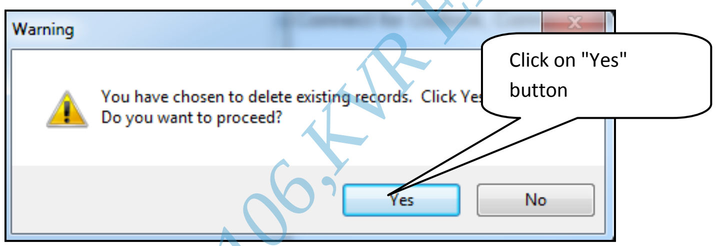


Step 4: Click on "Browse" button to select the directory where your success and error files will be saved.

Click on "Finish" button



Click on "Yes" button in the dialog box to confirm deleting records from salesforce.com

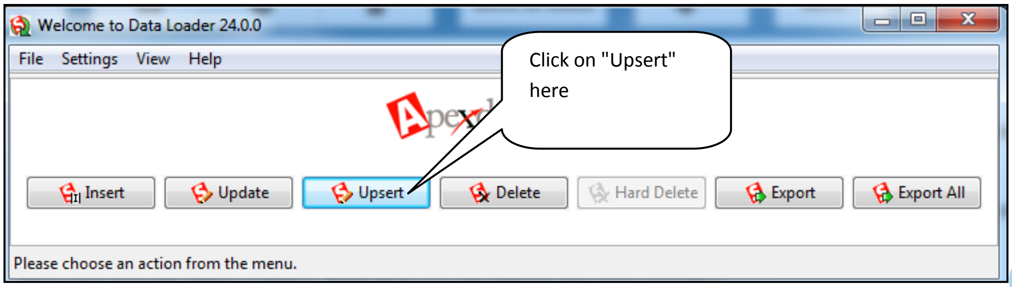


Procedure for "Upsert" operation using Data Loader:

Upsert --->This operation is used for inserting new records and modifying the existing records at a time. i.e insert + update

Note: For updating the existing records, we need Salesforce record ID(15 digits or 18 digits)

For inserting the new records, no need Salesforce record ID. Once the records inserted, salesforce automatically generates the ID.



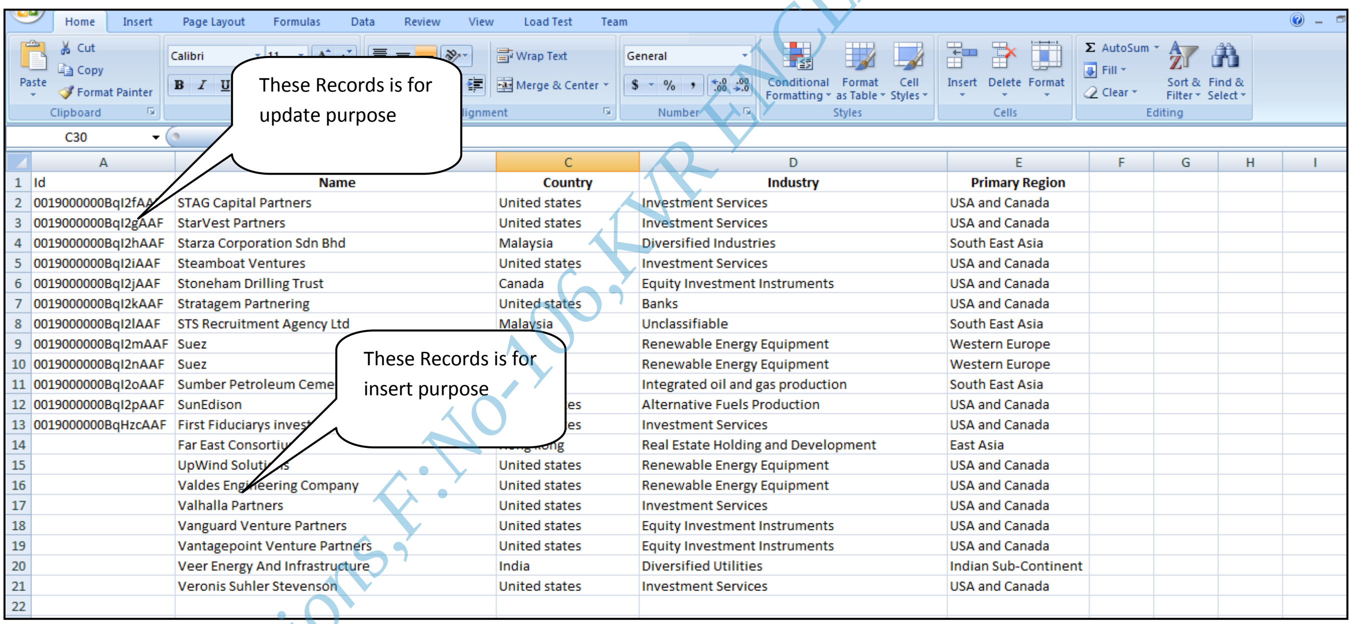
Step 1: Salesforce Settings

Same as the above mentioned screenshots.

Step 2: Select the Data Object and CSV file.

Same as the above mentioned screenshots.

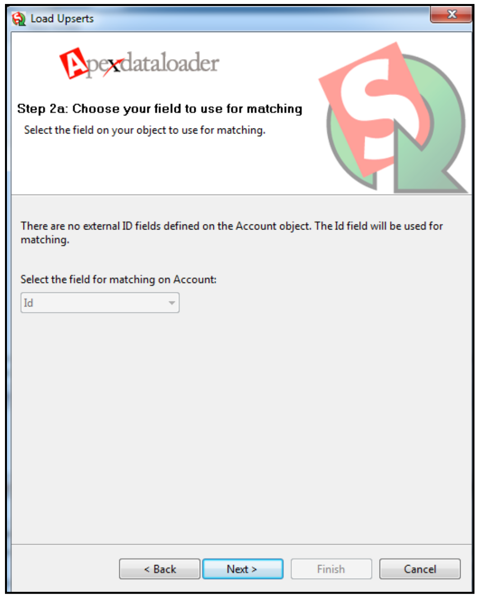
Note: The CSV file should be like the following screenshot



	Id	Name	Country	Industry	Primary Region
2	0019000000BqI2fAA	STAG Capital Partners	United states	Investment Services	USA and Canada
3	0019000000BqI2gAAF	StarVest Partners	United states	Investment Services	USA and Canada
4	0019000000BqI2hAAF	Starza Corporation Sdn Bhd	Malaysia	Diversified Industries	South East Asia
5	0019000000BqI2iAAF	Steamboat Ventures	United states	Investment Services	USA and Canada
6	0019000000BqI2jAAF	Stoneham Drilling Trust	Canada	Equity Investment Instruments	USA and Canada
7	0019000000BqI2kAAF	Stratagem Partnering	United states	Banks	USA and Canada
8	0019000000BqI2lAAF	STS Recruitment Agency Ltd	Malaysia	Unclassifiable	South East Asia
9	0019000000BqI2mAAF	Suez	[illegible]	Renewable Energy Equipment	Western Europe
10	0019000000BqI2nAAF	Suez	[illegible]	Renewable Energy Equipment	Western Europe
11	0019000000BqI2oAAF	Sumber Petroleum Ceme	[illegible]	Integrated oil and gas production	South East Asia
12	0019000000BqI2pAAF	SunEdison	[illegible]	Alternative Fuels Production	USA and Canada
13	0019000000BqHzcAAF	First Fiduciarys inves	[illegible]	Investment Services	USA and Canada
14		Far East Consorti	[illegible]	Real Estate Holding and Development	East Asia
15		UpWind Soluti	United states	Renewable Energy Equipment	USA and Canada
16		Valdes Engineering Company	United states	Renewable Energy Equipment	USA and Canada
17		Valhalla Partners	United states	Investment Services	USA and Canada
18		Vanguard Venture Partners	United states	Equity Investment Instruments	USA and Canada
19		Vantagepoint Venture Partners	United states	Equity Investment Instruments	USA and Canada
20		Veer Energy And Infrastructure	India	Diversified Utilities	Indian Sub-Continent
21		Veronis Suhler Stevenson	United states	Investment Services	USA and Canada

Step:2a Choose fields to use for mapping

Here the select the field(External Id field) for matching on Account



Upsert uses an indexed custom field or external ID to determine whether to create a new record or update an existing record.

- If the external ID is not matched, then a new record is created.
- If the external ID is not matched once, then the existing record is updated.
- If the external ID is not matched multiple times, then an error is reported.

External ID:

External ID is a flag that can be added to a custom field to indicate that it should be indexed and treated as an ID.

It is available on all objects that support custom fields.

An Object can have three(3) **External ID** fields for the following data types:

- Text
- Number
- Email

Click on "Next" Button

Step 3: Mapping

Same as above mentioned screenshots

Step 4: Finish

Same as above mentioned screenshots

Import wizard:-

It is the one way to import/export the data into/from salesforce.com

* This supports Accounts/contacts, Leads, solutions & Custom objects

* supports upto 50,000 records.

* Duplicates will not be allowed.

* Don't have Batch size.

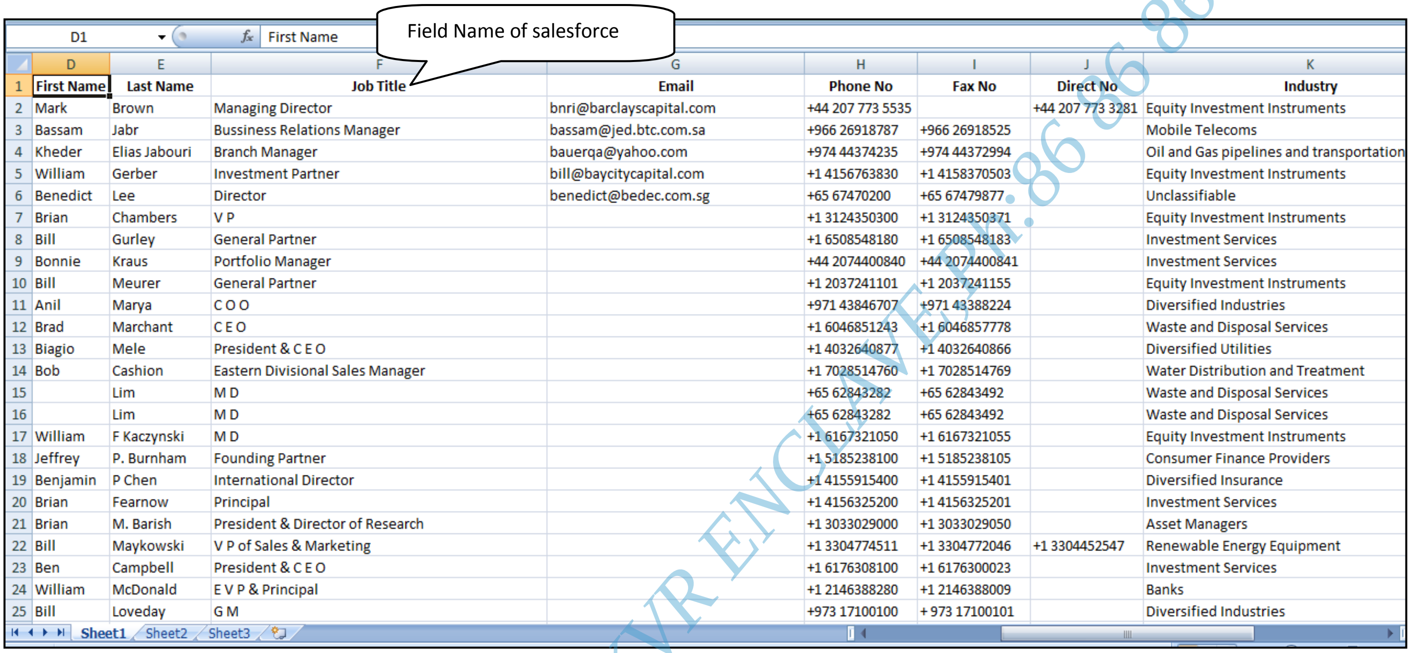
*** Salesforce Import wizard supports only csv files.

csv ↓ Comma separated values (or) Comma delimited values

Procedure for Import Accounts/Contacts in Salesforce.com:

Before importing records into salesforce.com, prepare the csv file as per the below screen shot

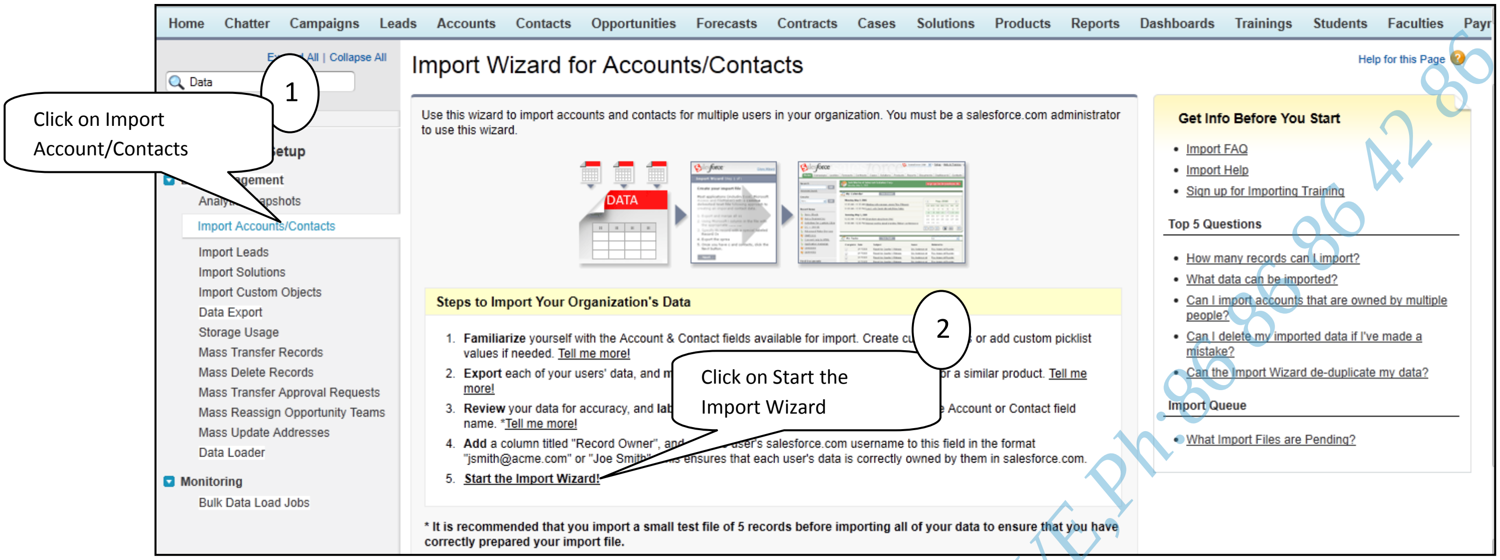
In the following csv file, the column headers indicates the field names in salesforce.com



	D	E	F	G	H	I	J	K
1	First Name	Last Name	Job Title	Email	Phone No	Fax No	Direct No	Industry
2	Mark	Brown	Managing Director	bnri@barclayscapital.com	+44 207 773 5535		+44 207 773 3281	Equity Investment Instruments
3	Bassam	Jabr	Bussiness Relations Manager	bassam@jed.btc.com.sa	+966 26918787	+966 26918525		Mobile Telecoms
4	Kheder	Elias Jabouri	Branch Manager	bauerqa@yahoo.com	+974 44374235	+974 44372994		Oil and Gas pipelines and transportation
5	William	Gerber	Investment Partner	bill@baycitycapital.com	+1 4156763830	+1 4158370503		Equity Investment Instruments
6	Benedict	Lee	Director	benedict@bedec.com.sg	+65 67470200	+65 67479877		Unclassifiable
7	Brian	Chambers	V P		+1 3124350300	+1 3124350371		Equity Investment Instruments
8	Bill	Gurley	General Partner		+1 6508548180	+1 6508548183		Investment Services
9	Bonnie	Kraus	Portfolio Manager		+44 2074400840	+44 2074400841		Investment Services
10	Bill	Meurer	General Partner		+1 2037241101	+1 2037241155		Equity Investment Instruments
11	Anil	Marya	C O O		+971 43846707	+971 43388224		Diversified Industries
12	Brad	Marchant	C E O		+1 6046851243	+1 6046857778		Waste and Disposal Services
13	Biagio	Mele	President & C E O		+1 4032640877	+1 4032640866		Diversified Utilities
14	Bob	Cashion	Eastern Divisional Sales Manager		+1 7028514760	+1 7028514769		Water Distribution and Treatment
15		Lim	M D		+65 62843282	+65 62843492		Waste and Disposal Services
16		Lim	M D		+65 62843282	+65 62843492		Waste and Disposal Services
17	William	F Kaczynski	M D		+1 6167321050	+1 6167321055		Equity Investment Instruments
18	Jeffrey	P. Burnham	Founding Partner		+1 5185238100	+1 5185238105		Consumer Finance Providers
19	Benjamin	P Chen	International Director		+1 4155915400	+1 4155915401		Diversified Insurance
20	Brian	Fearnow	Principal		+1 4156325200	+1 4156325201		Investment Services
21	Brian	M. Barish	President & Director of Research		+1 3033029000	+1 3033029050		Asset Managers
22	Bill	Maykowski	V P of Sales & Marketing		+1 3304774511	+1 3304772046	+1 3304452547	Renewable Energy Equipment
23	Ben	Campbell	President & C E O		+1 6176308100	+1 6176300023		Investment Services
24	William	McDonald	E V P & Principal		+1 2146388280	+1 2146388009		Banks
25	Bill	Loveday	G M		+973 17100100	+ 973 17100101		Diversified Industries

1. Click on Your Name ----> Setup ----> Administration Setup ---> Data Management ----> Import Accounts/Contacts

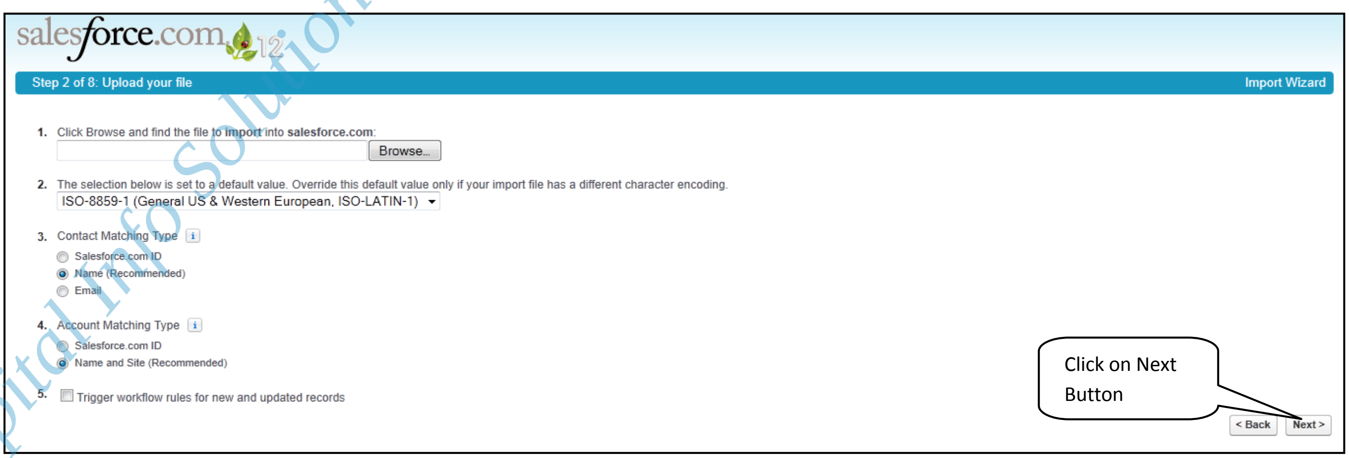
2. Click on Import Accounts/Contacts and Click on Start the Import Wizard on Steps to Import Your Organizations Data



3. Now we are ready to follow the Import Wizard to seamlessly import Accounts/ Contacts into SalesForce.

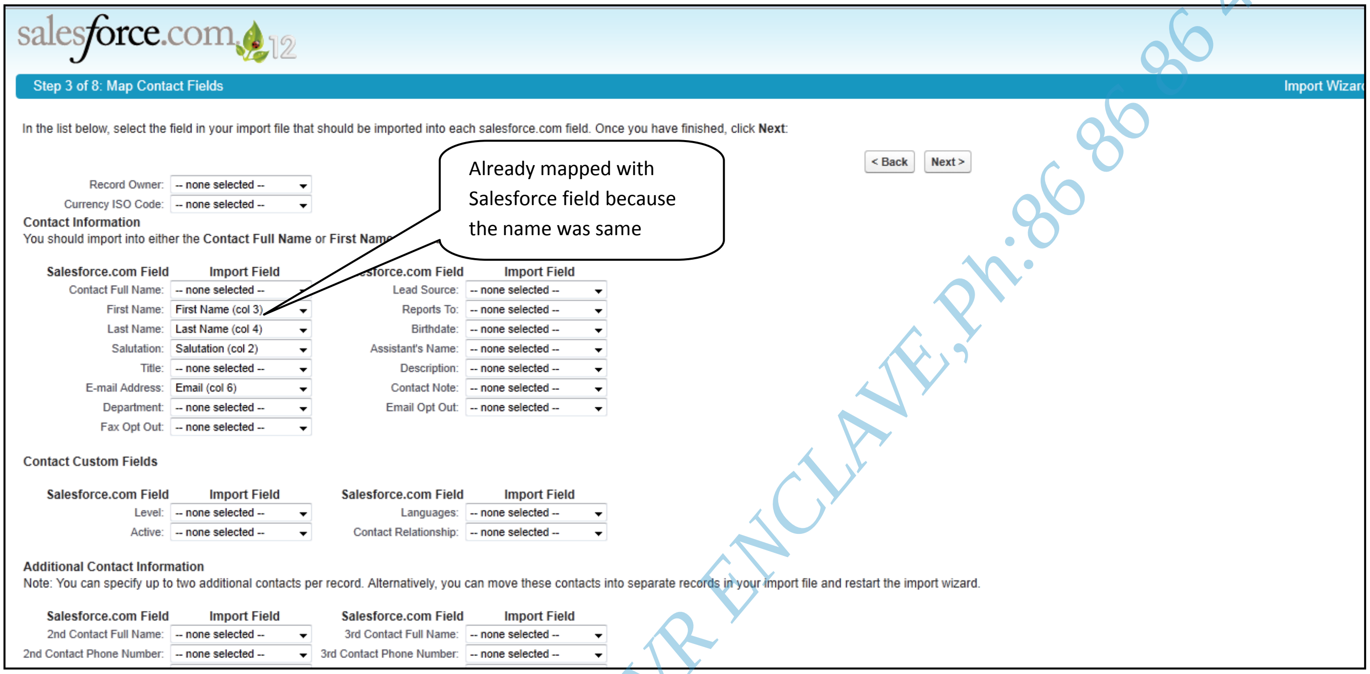
Click on Next Button in Step 1

4. Click “Browse” button to select the file which we want to Import into Salesforce.com(Select this csv file from your computer)



5. The wizard will now start mapping SalesForce fields with those contacts we choose to import.

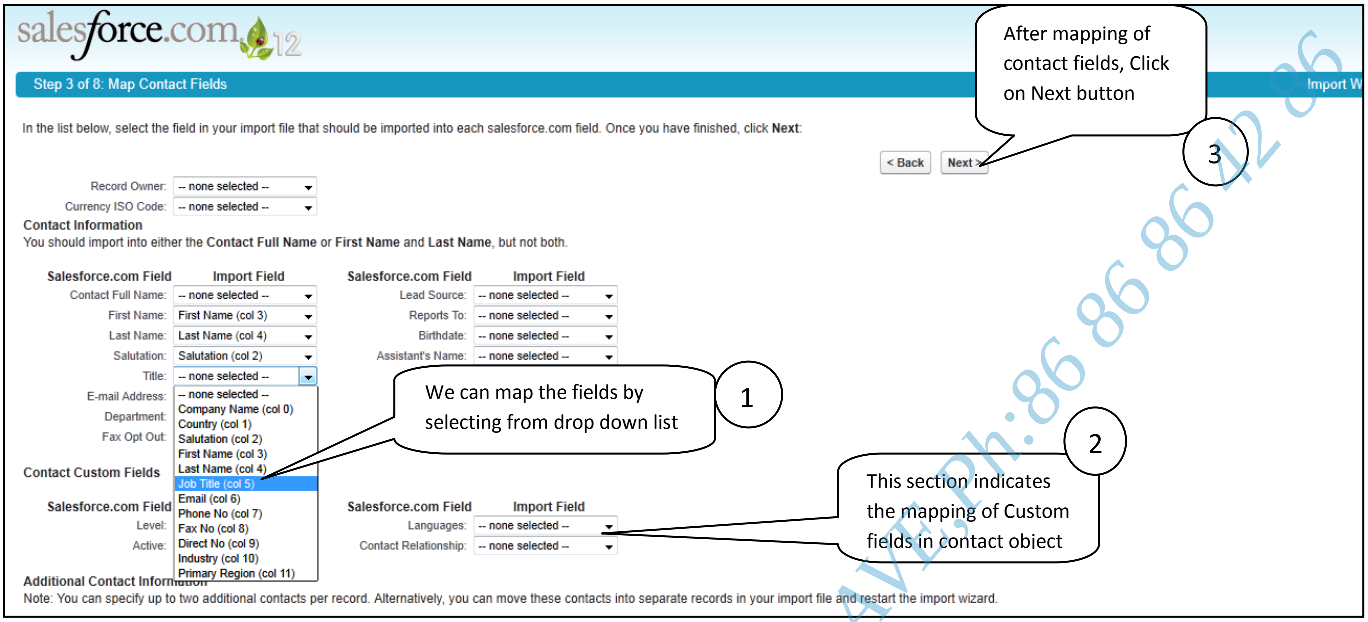
Note: Some of fields(CSV column headers) already mapped with Salesforce fields because column header have same name as in salesforce.



The following screen shot provides the information about the Mapping of Contact fields(Both Standard and Custom)

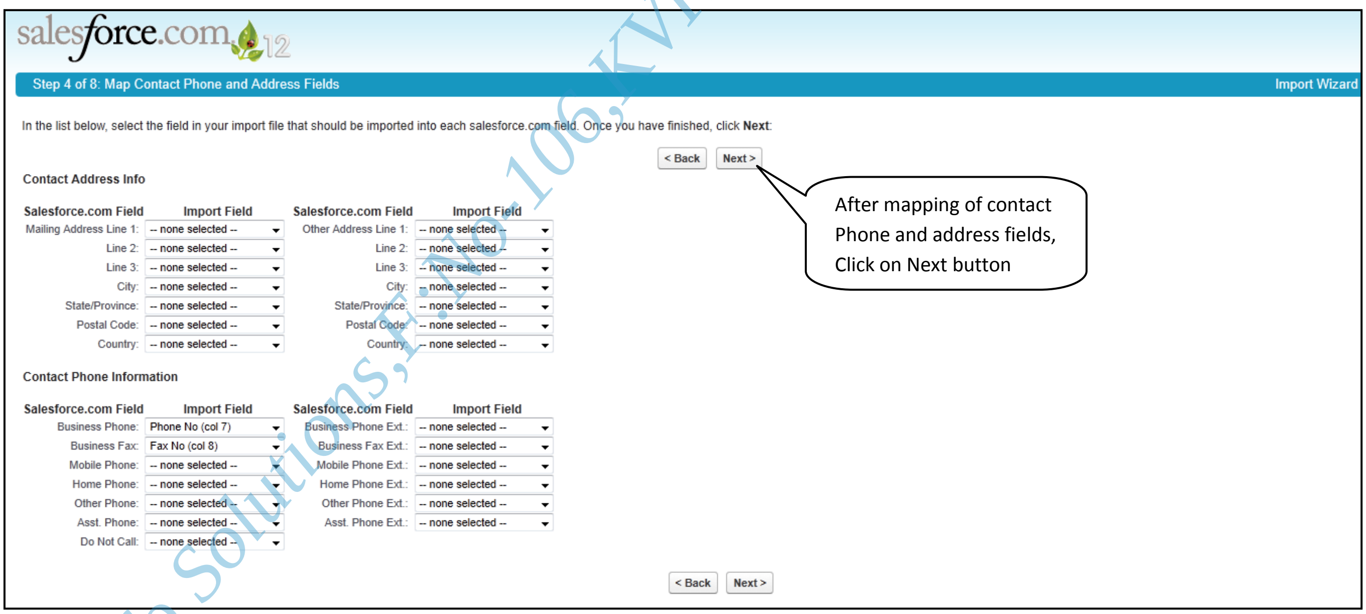
If we map the Import field with Salesforce field, then the field value that is there in csv file will be stored in the salesforce, otherwise the value will be blank.

Select the field in import file that should be imported into each salesforce.com field. Once we finished the mapping of Contact fields, click on "Next" button



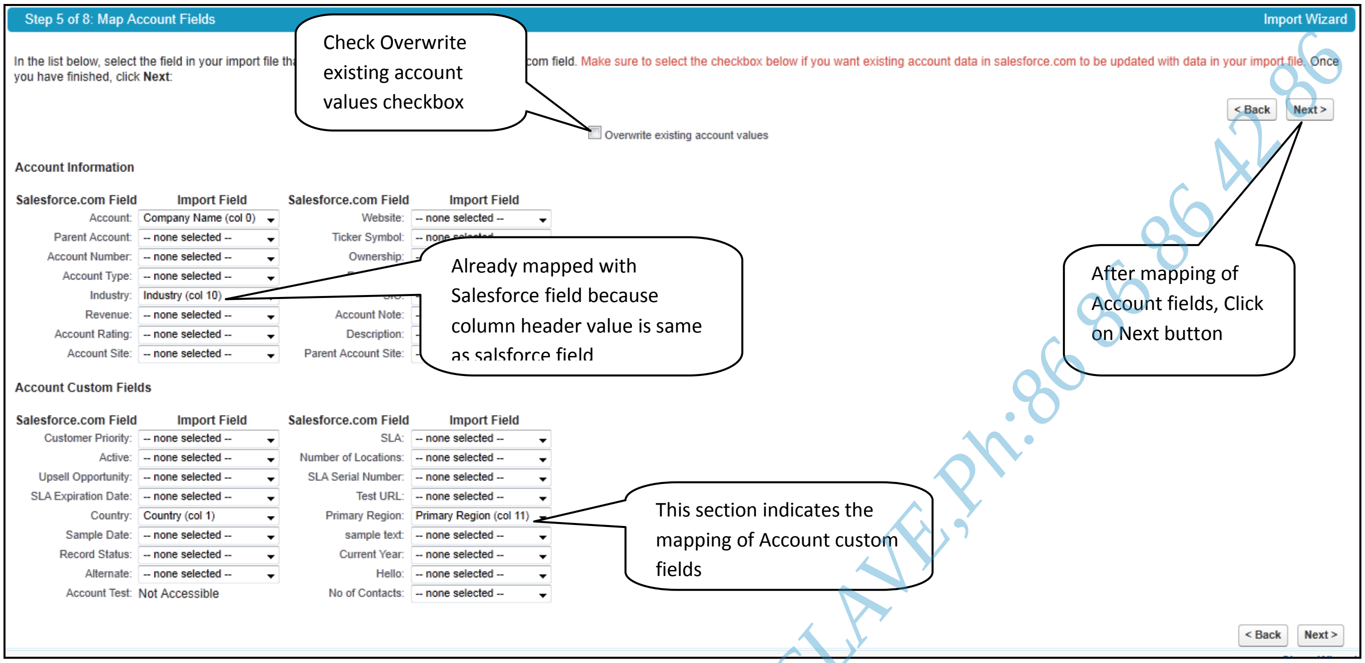
6. The following screen shot gives the Mapping of Contact Phone and Address fields

Select the field in import file that should be imported into each salesforce.com field. Once we finished the mapping of Contact Phone and Address fields, click on "Next" button



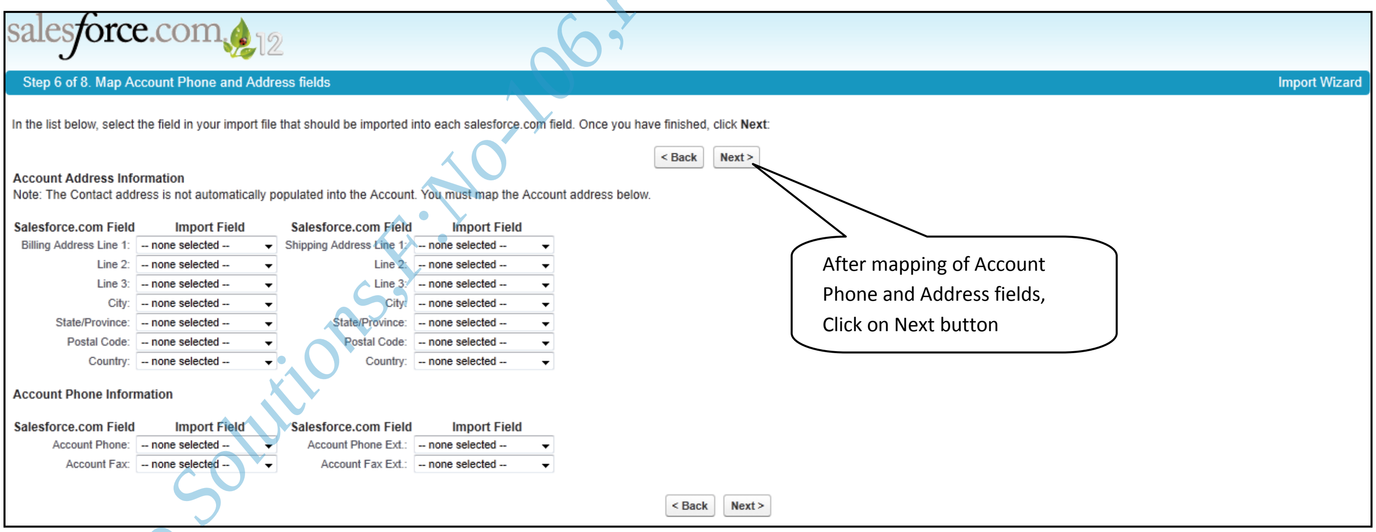
7. In this step, we can learn about how to map account fields(Mapping between the column headers in csv file and salesforce fields)

Select the field in import file that should be imported into each salesforce.com field. Once we finished the mapping of Account fields, click on "Next" button



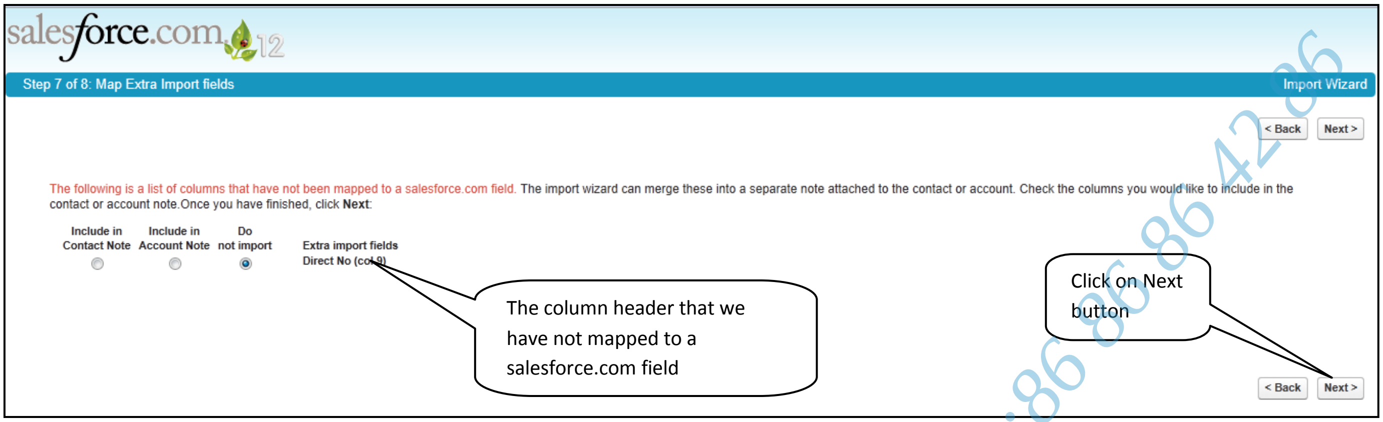
8. The following screen describes about the mapping of Account Phone and Address fields between column headers in csv file and salesforce fields

Select the field in import file that should be imported into each salesforce.com field. Once we finished the mapping of Account Phone and Address fields, click on "Next" button

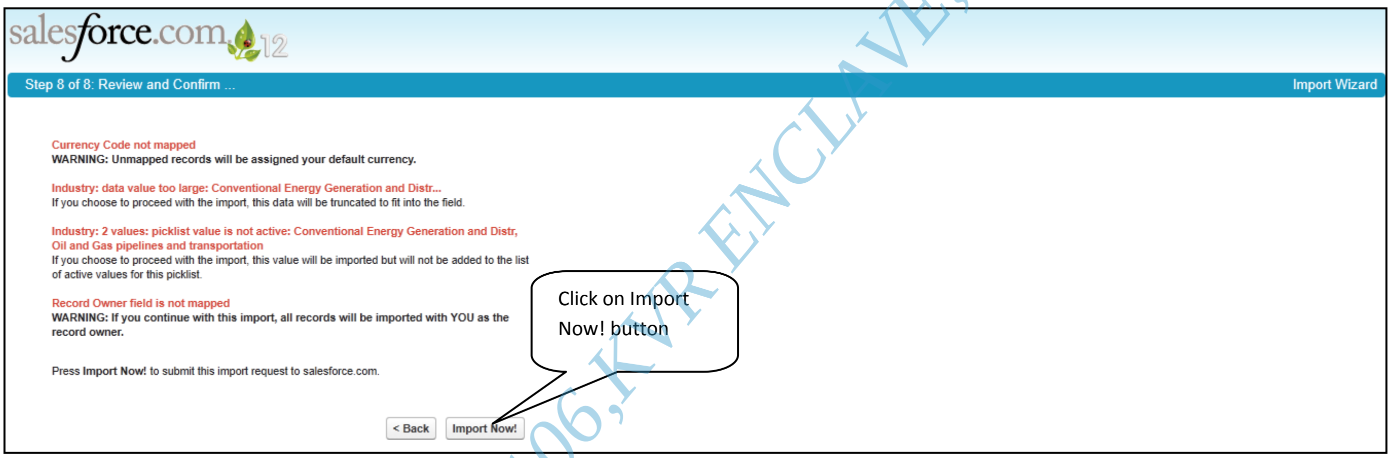


9. The following screen shot shows the list of columns that we have not been mapped to a salesforce.com field.

Click on "Next" Button

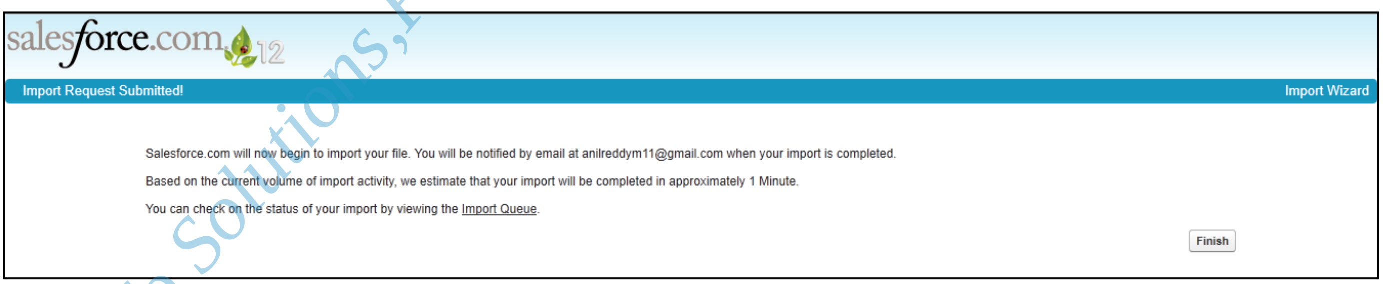


10. Click on Import Now! button in the following screen shot



11. The import Request has been submitted and they will notified by email when our import completed.

Click on "Finish" button



12. Check your mail from salesforce saying that your import completed, it consists of how many accounts created, how many contacts created and what are the errors we are getting which are stopping our import.

13. Once check the Record Count of Accounts and Contacts after inserting from the following path

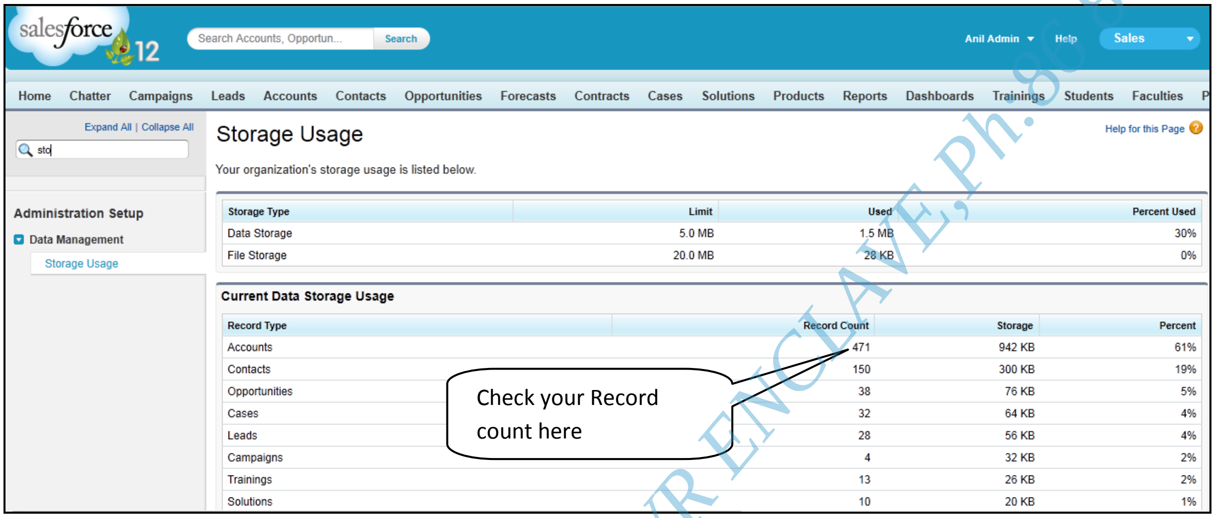
Your Name ----> Setup ----> Administration Setup ---> Data Management ----> Storage Space

Storage Space gives the Organization's Storage usage.

Record Count ---> The Record Count gives the number of records that are in the salesforce

Storage ---> The Storage gives the size of all the records

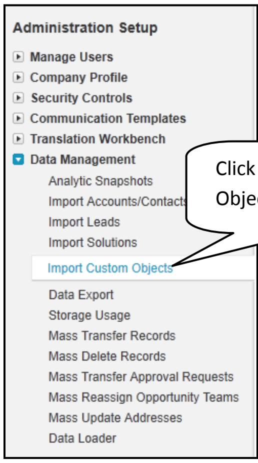
Percent ---> The percent gives the value saying that this much of size is completed and we can use upto 100%.



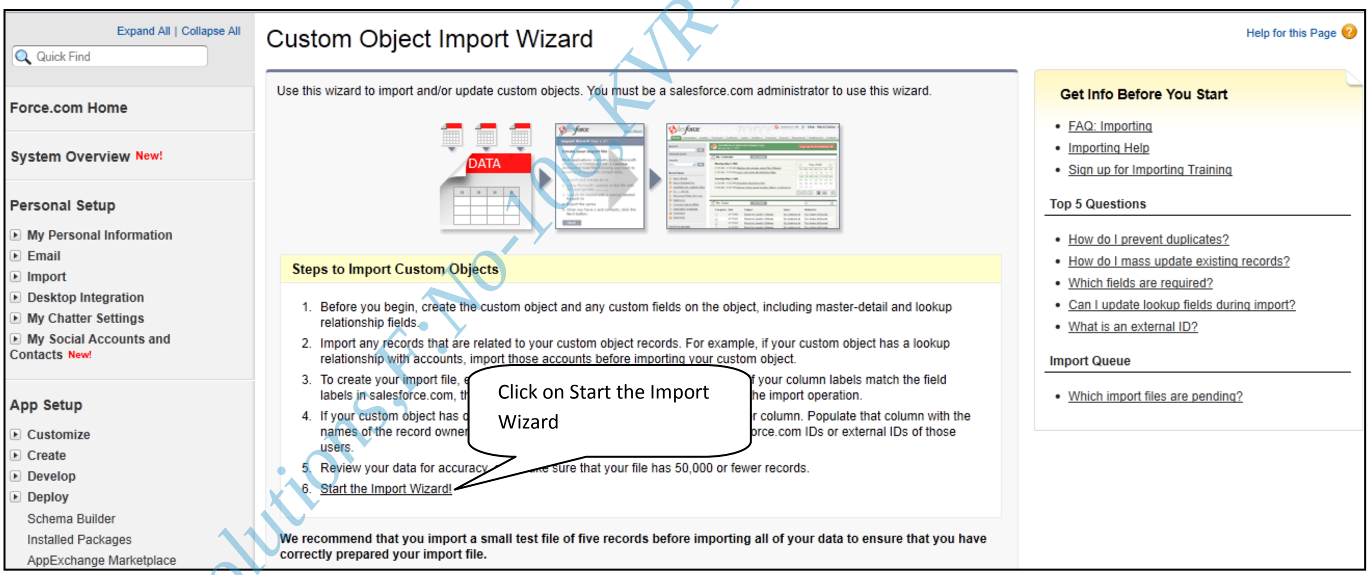
Procedure for Import Custom Objects in Salesforce.com:

1. Go to the following path for importing Custom Objects in salesforce.com

Your Name ----> Setup ----> Administration Setup ---> Data Management ----> Import Custom Objects

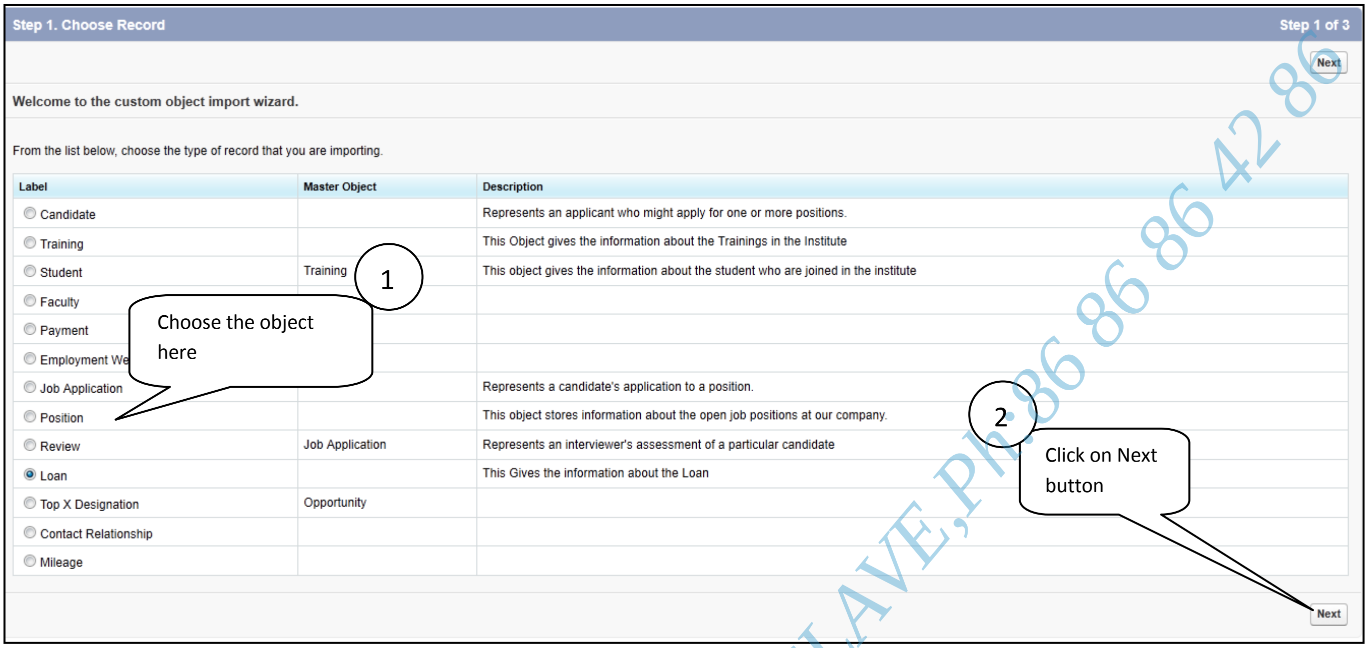


2. Click on "Start the Import Wizard".



3.

Step 1: From the following screen, Choose the type of record which we are importing (i.e Custom Object) and Click on "Next" button.



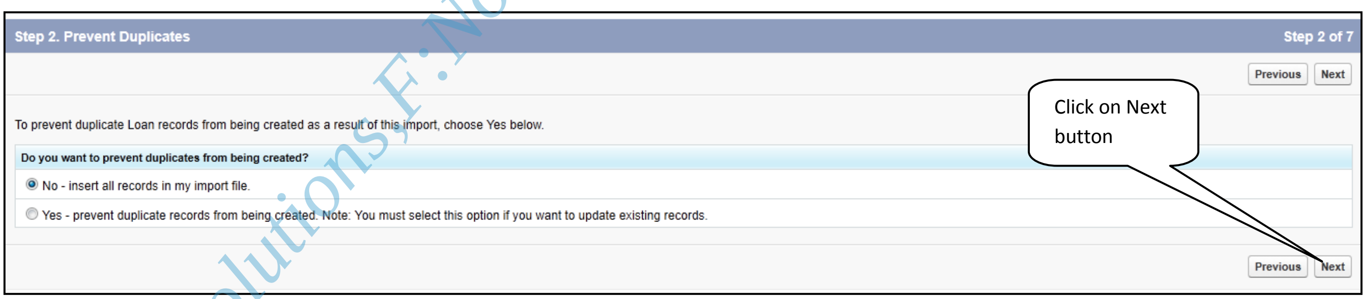
4.

Step 2: Prevent Duplicates

Use the first checkbox in the following screen for no prevent duplicates i.e this option insert all the records in my import file.

Use the second checkbox which will prevent the duplicate records from being created.

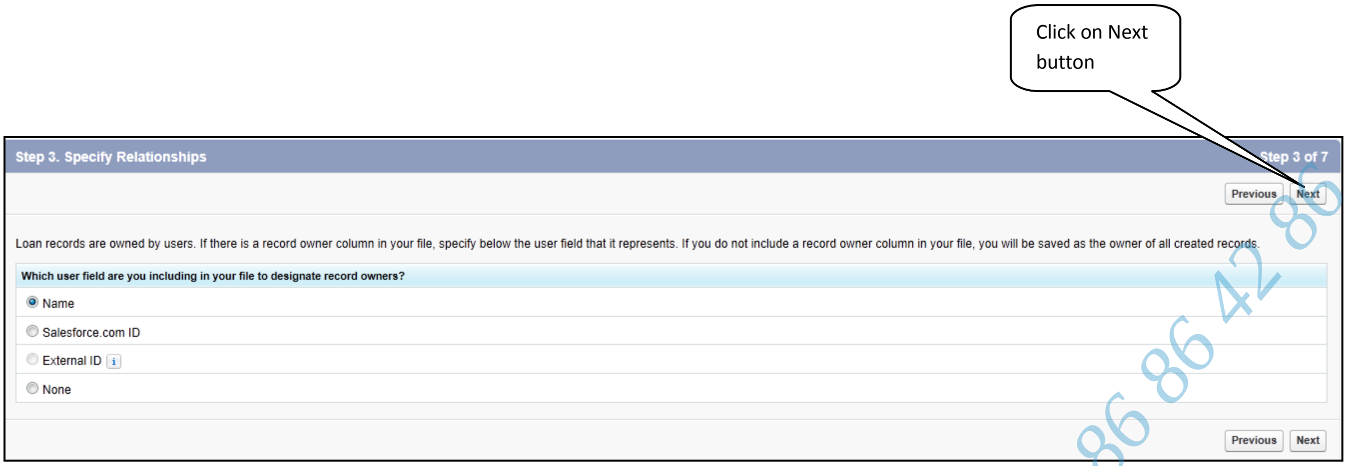
Click on "Next" button



5.

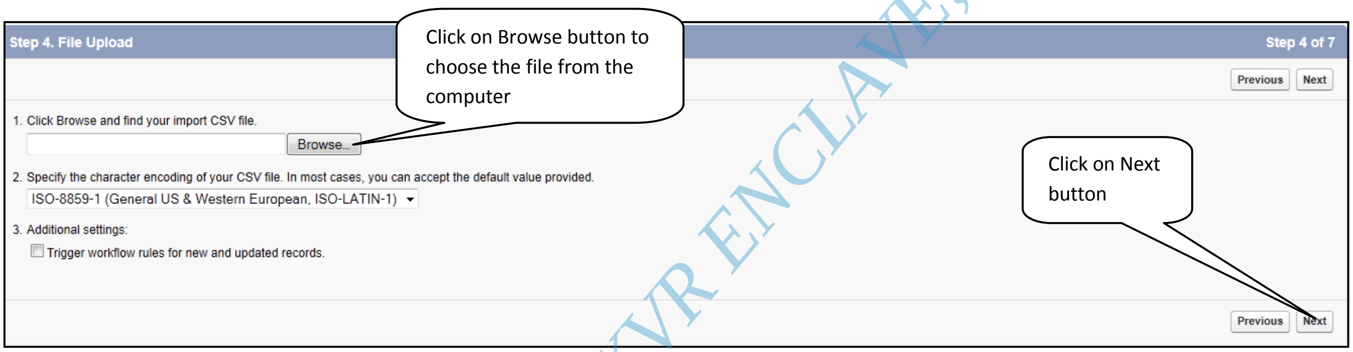
Step 3: Specify Relationships

Select any checkbox in the following screen which will designate the record owners. Click on "Next" button

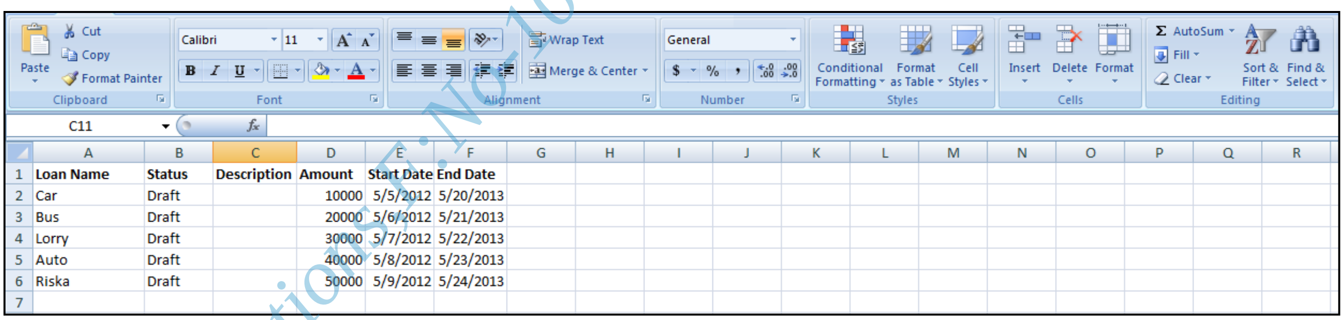


6.

Step 4: Choose the source csv file from the following screen by clicking on "Browse" button and click on "Next" button.



Choose the following csv file



Loan Name	Status	Description	Amount	Start Date	End Date
Car	Draft		10000	5/5/2012	5/20/2013
Bus	Draft		20000	5/6/2012	5/21/2013
Lorry	Draft		30000	5/7/2012	5/22/2013
Auto	Draft		40000	5/8/2012	5/23/2013
Riska	Draft		50000	5/9/2012	5/24/2013

Note: Make sure that the object "Loan" and following fields are created in your edition

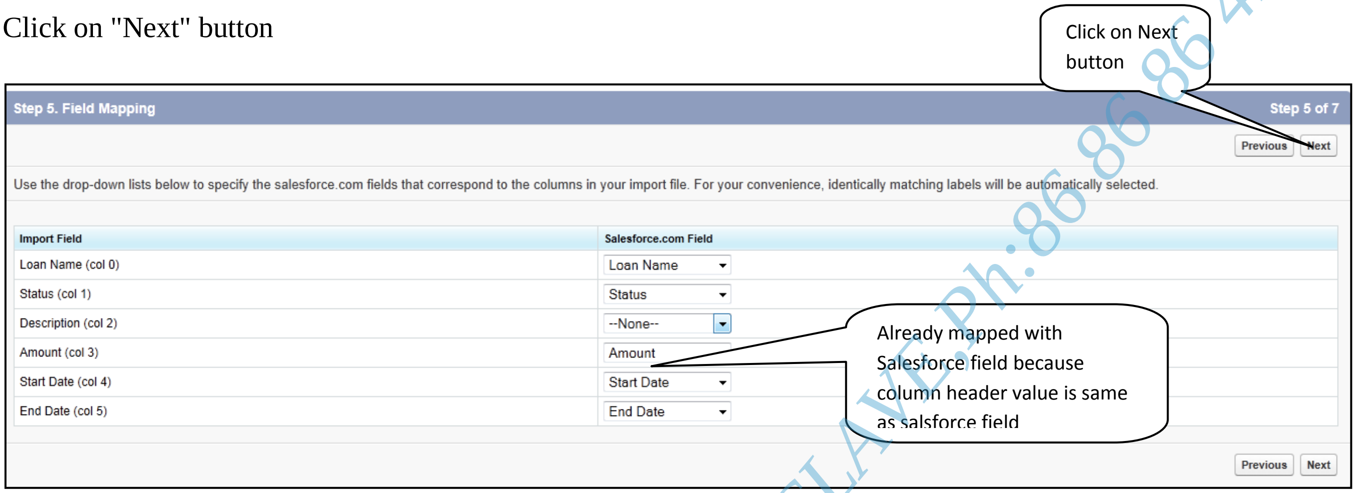
Object Name: Loan

Field Name	Data Type	Values
Amount	Currency	
Status	Picklist	Draft, Submitted, Approved, Rejected
Start Date	Date	
End Date	Date	

7.

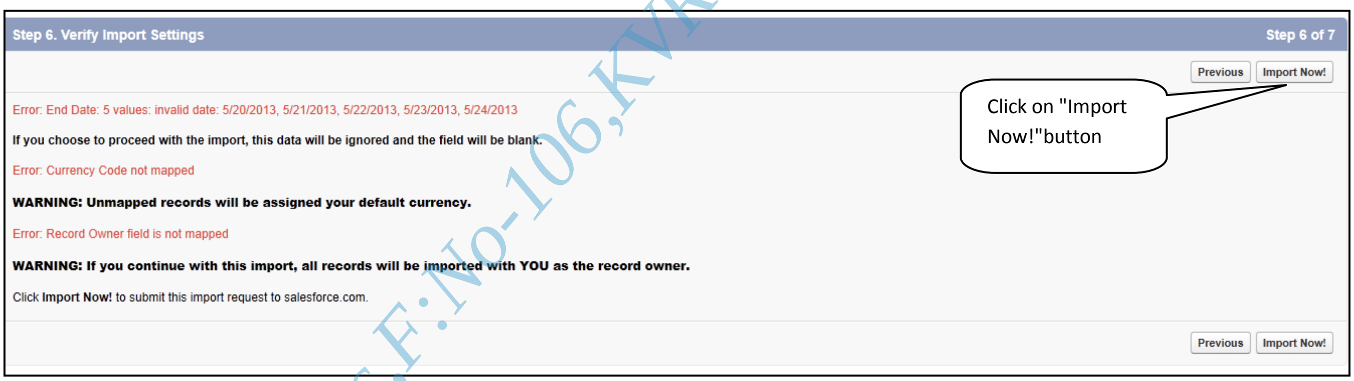
Step 5: Do the field mapping from the following screen, use the drop-down lists below to specify the salesforce.com fields that correspond to the columns in import file

Click on "Next" button



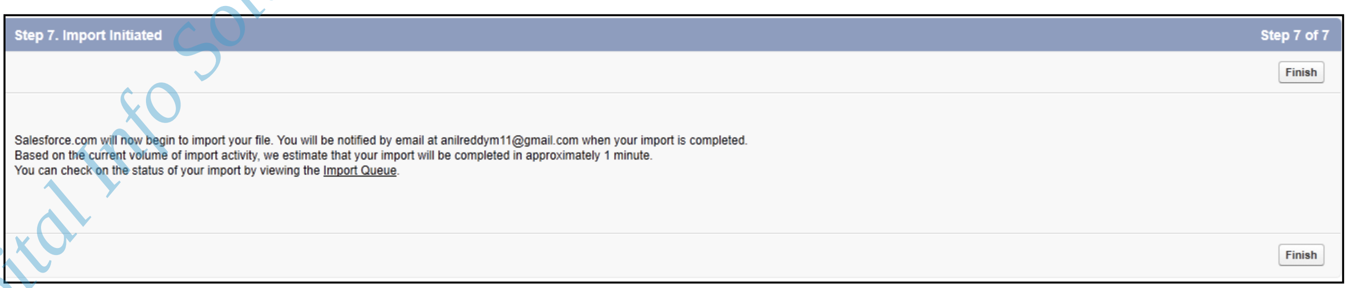
8.

Step 6: Click on "Import Now!" button for importing the records into salesforce.com

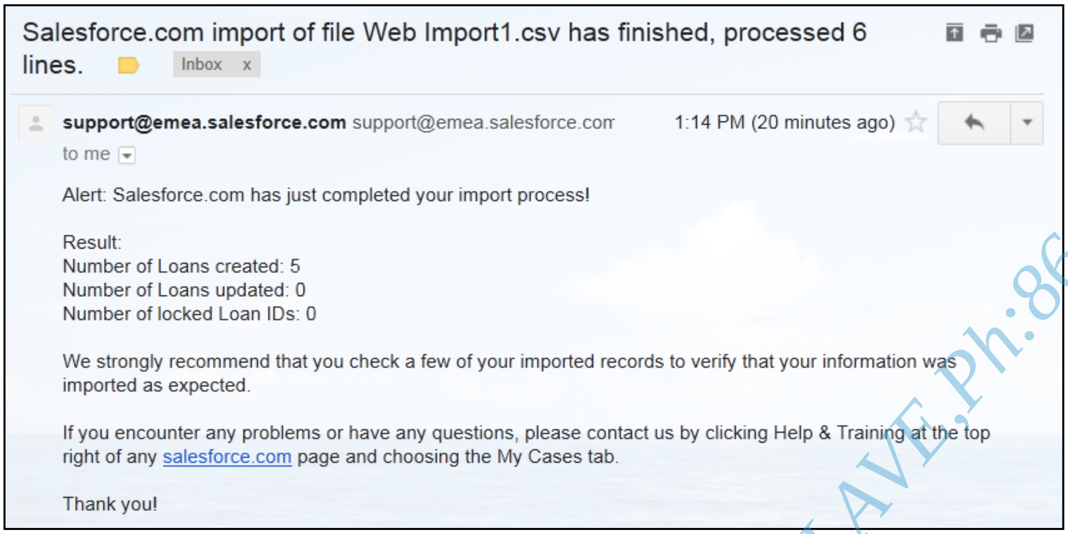


9.

Step 7: Click on "Finish" button



Once the Import completed, the user will receive following type of email from salesforce support which contains how many records created and what are errors we are getting which are stoping for importing.


Salesforce.com import of file Web Import1.csv has finished, processed 6 lines. Inbox x

support@emea.salesforce.com support@emea.salesforce.com 1:14 PM (20 minutes ago)
to me

Alert: Salesforce.com has just completed your import process!

Result:
Number of Loans created: 5
Number of Loans updated: 0
Number of locked Loan IDs: 0

We strongly recommend that you check a few of your imported records to verify that your information was imported as expected.

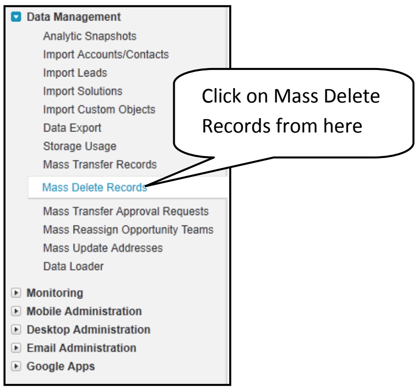
If you encounter any problems or have any questions, please contact us by clicking Help & Training at the top right of any salesforce.com page and choosing the My Cases tab.

Thank you!

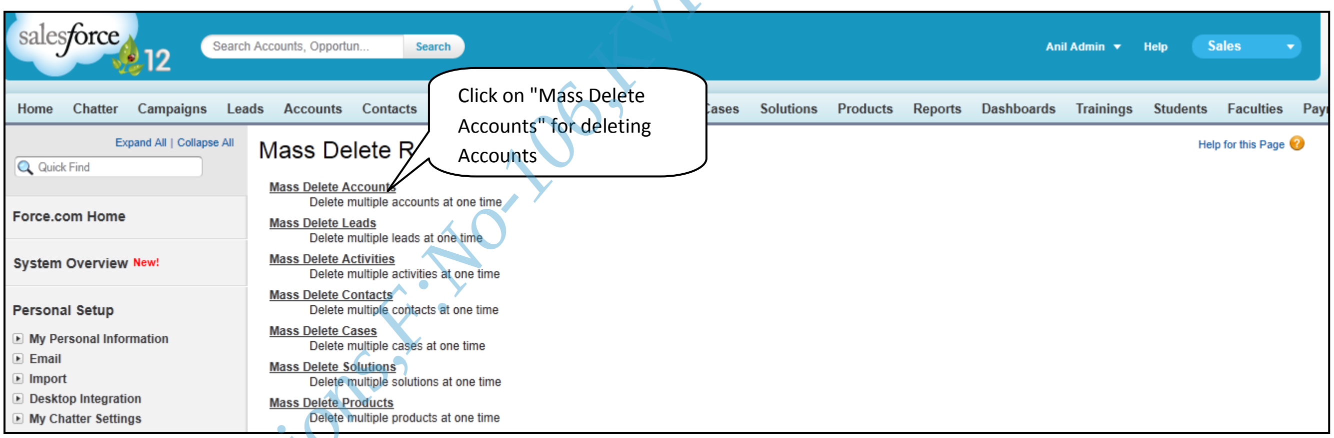
Procedure for Mass Delete Records in Salesforce.com:

1. Go to the following path for Mass Deleting Records in salesforce.com

Your Name ----> Setup ----> Administration Setup ---> Data Management ----> Mass Delete Records

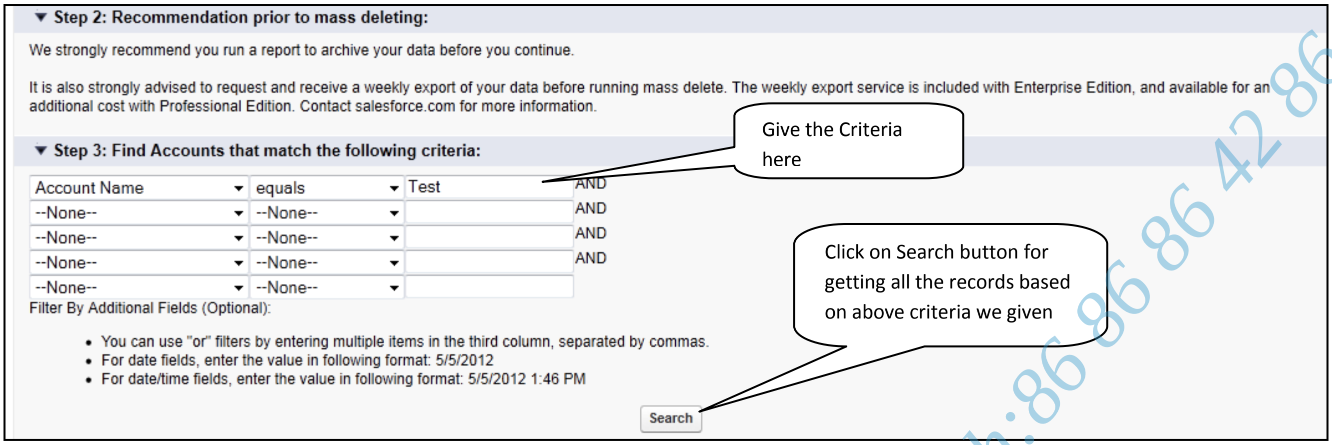


2. Click on "Mass Delete" link from the following screen.



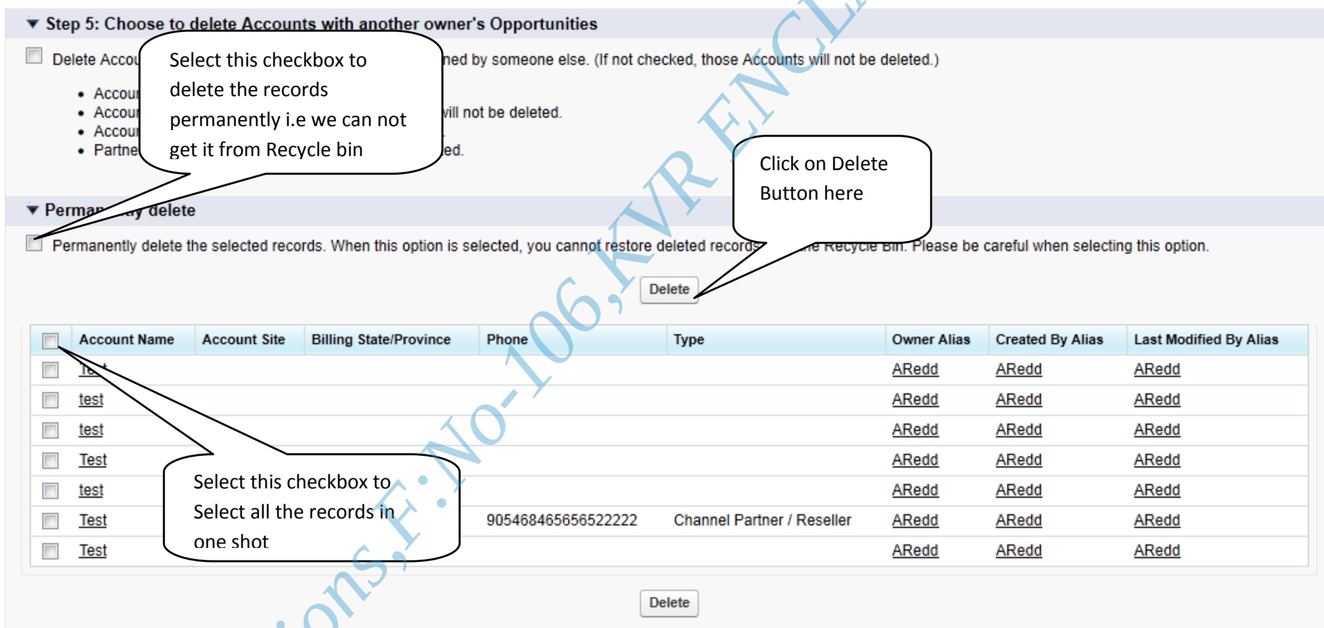
3.

Give the criteria in the following screen and click on "Search" button for getting all the records based on criteria



4. Select the records and Click on "Delete" button for deleting the records

Select the "Permanently delete the selected records" checkbox to delete the records permanently i.e we cannot restore deleted records from the Recycle Bin.



Report Types:-

* Report types allow us to build a framework in the report builder from which users can create and customize Reports.

* A report type defines the set of records and fields available to a report based on the relationships between a primary object and its related objects.

Creating Custom Report Types:-

* Salesforce provides a large range of pre-defined standard report types

1. Accounts & Contacts → Contains information about accounts and contacts
2. Opportunities
3. Customer support (Report types regarding cases & solutions)
4. Leads
5. Campaigns
6. Activities
7. Administrative Report types
8. Price Books, Products and Assets report types.

Creating Custom Report Types:-

In addition to the standard report types, we can also create custom report types. Custom report types extend the types of reports from which all users in organization can create or update custom reports.

Custom report types are created using the following steps

* follow the path

Your Name → setup → App setup → Create → Report types → click on "New Custom Report Types" button

Step 1 :- Defining the Custom Report Type

* From the Primary object drop-down list, select the primary object from which we want to build Custom Report type.

* Enter the Report type Label and the Report type Name. The label can up to 255 characters long.

* Enter a description for the Custom Report type, this will be visible to users who create Reports and is used to help the purpose for the Custom Report type.

* select the catogory to store the Custom report type.

* Select the Deployment status.

If we select "In Development", this will hide the Custom Report type and prevent users from creating and running reports from the report type.

* Choose "Deployed", if we want to let users create and run reports using that Custom report type.

* Now click on "Next" button, then choose the object relationships that a report can display when run from a

Custom report type.

Step 2: Define Reports Records set:-

To add child objects to the report type, so that user's can access both fields in the report builder.

* click on the box under the primary object.
* Select a child object. Only related objects are shown.
* For each child object, select one of the following criteria.

Each "A" record must have at least one related "B" record

↓

Only parent records with child records are shown in the report

"A" records may or may not have related "B" records.

↓

Parent records are shown, whether or not they have child records

* Click "Save" button.

Edit Layout:-

After clicking on "Save", the layout can be edited to specify which standard and custom fields a report can display when created or run from the custom report type by click on "Edit Layout" button.

* To start configuring the layout, select fields from the right-hand box and drag them to a section on the left.

* We can view a specific object's fields by selecting an object from the "View" drop-down list and arrange fields within sections as they should appear to users.

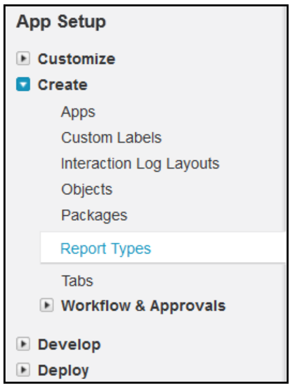
Note:- We can add up to 1000 fields to each custom report type.

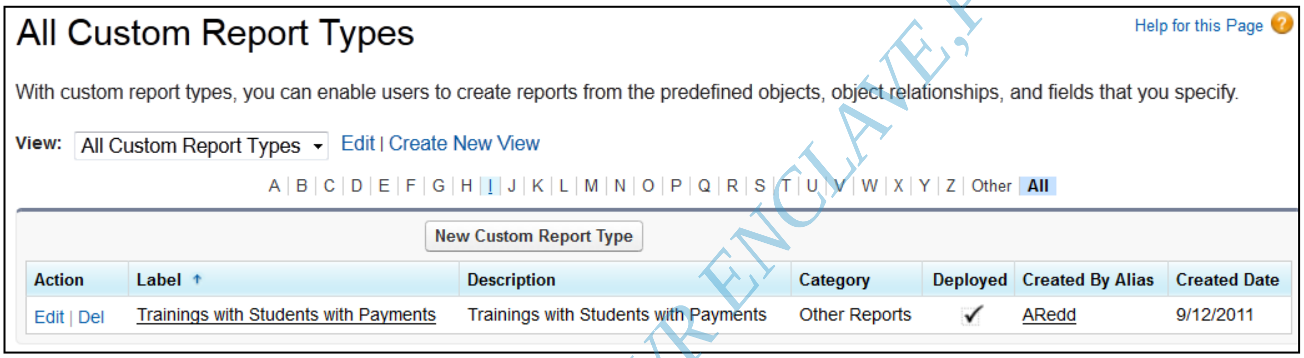
* To rename the sections, click on Edit next to an existing section, or Create a new section by clicking on "Create New Section". Now click on "Save".

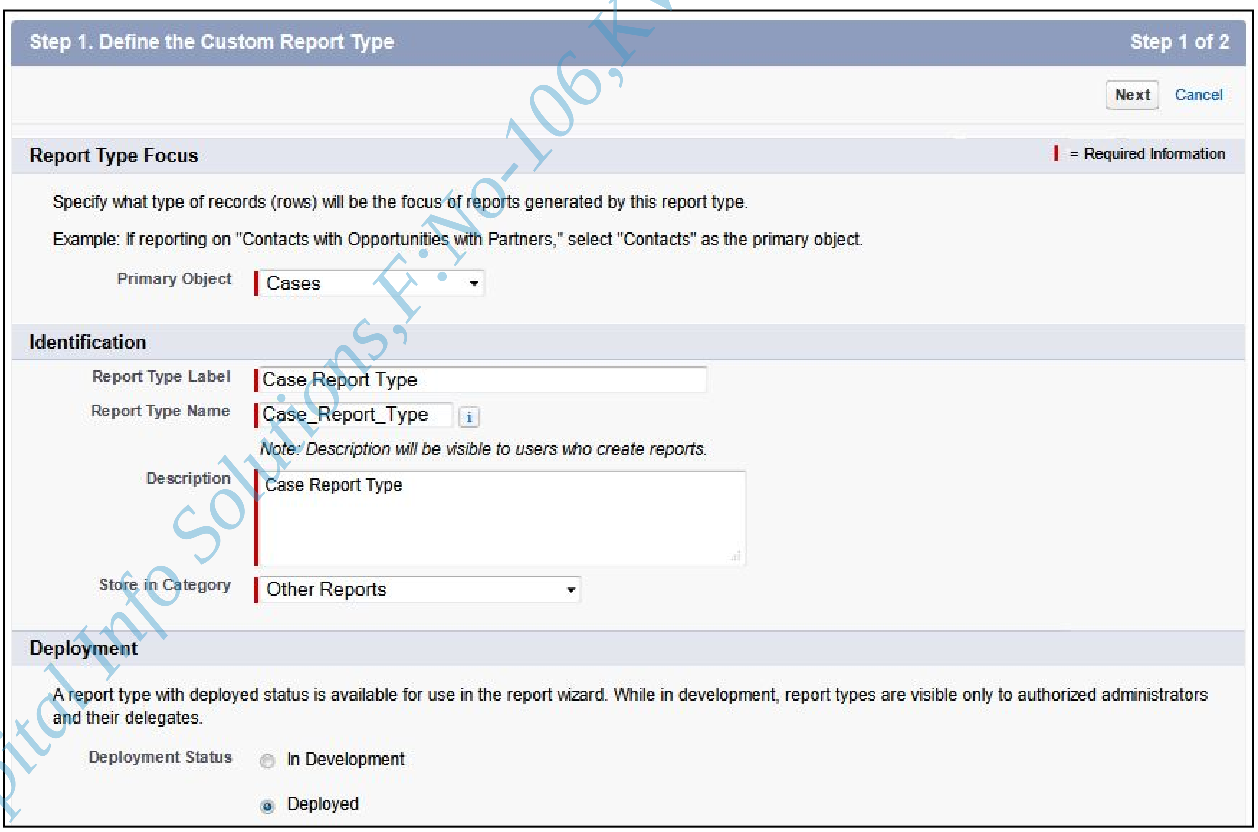
Note:- * When a Custom Report Type is deleted, any Reports that have been created from it are also deleted.

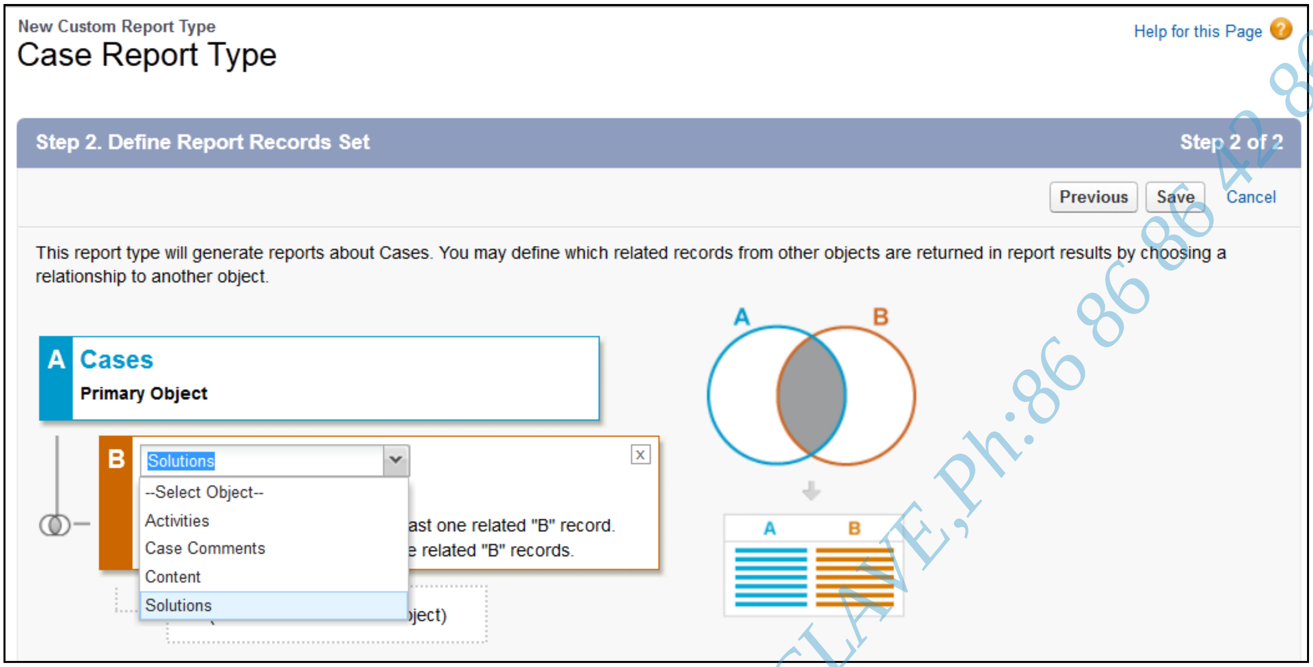
* Furthermore, any dashboard components that have been created from a report that was created from a deleted Custom Report Type will show an error message whenever viewed.

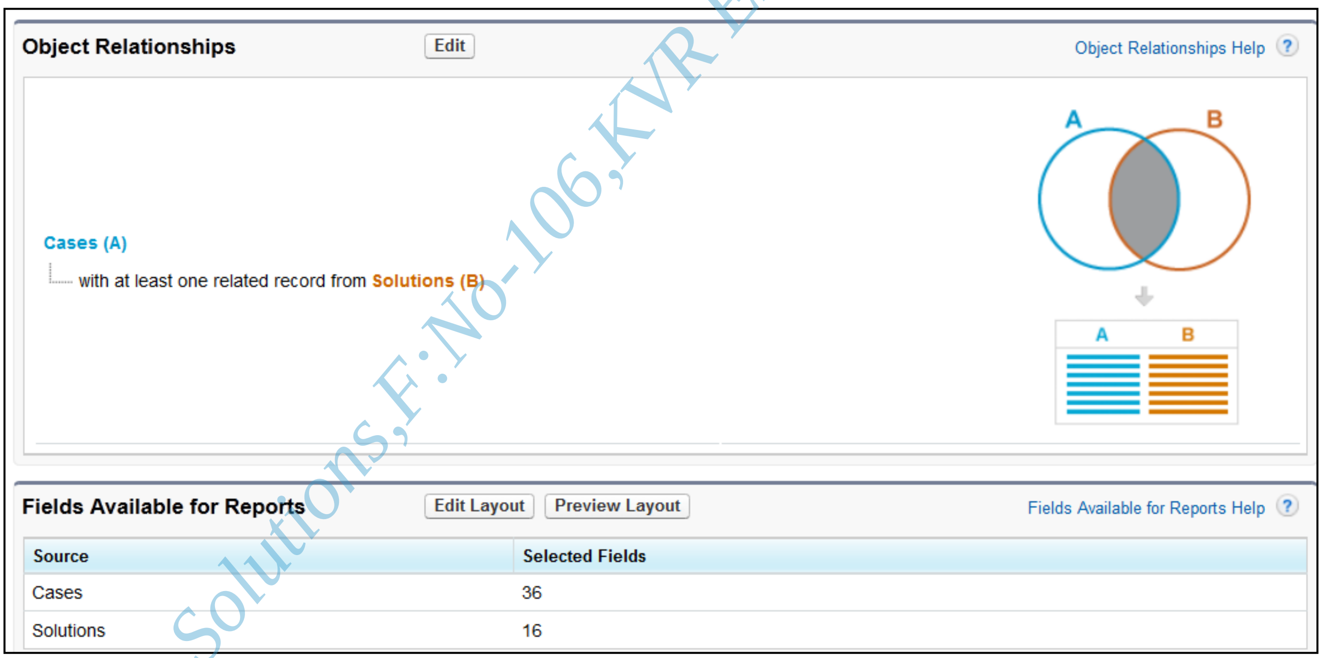
Record Types:

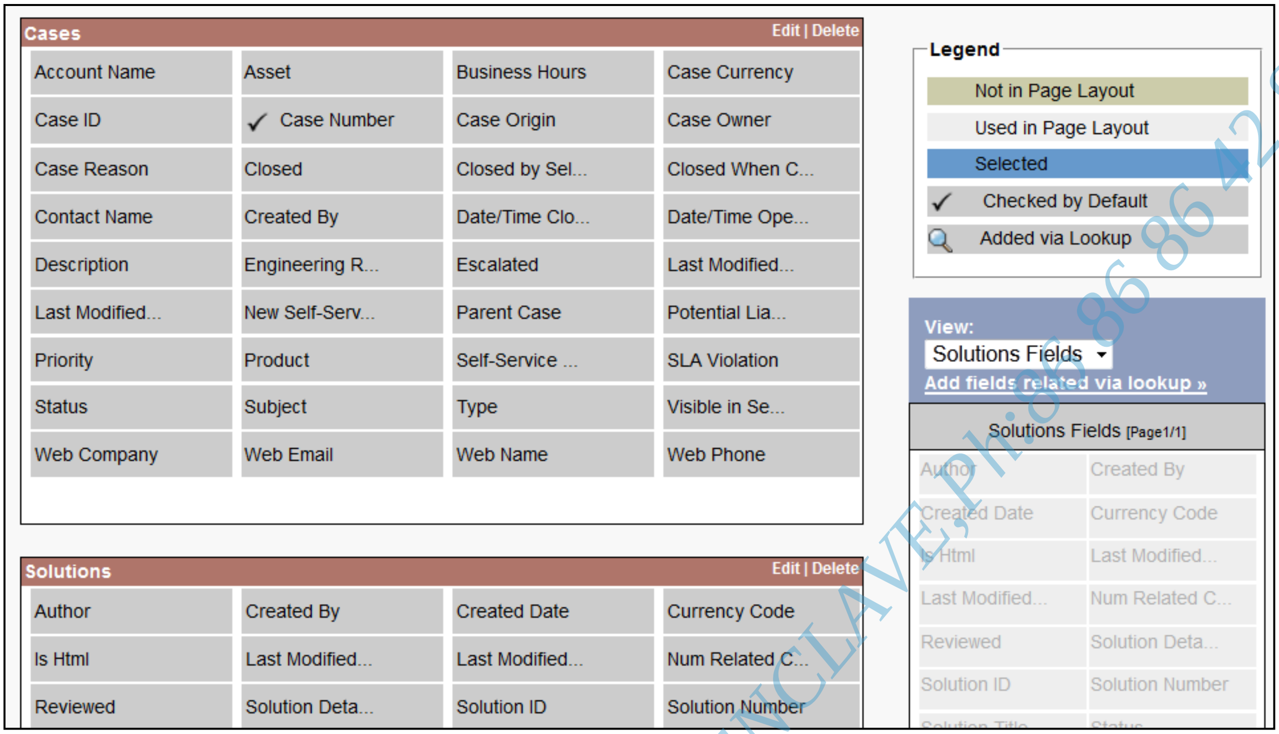


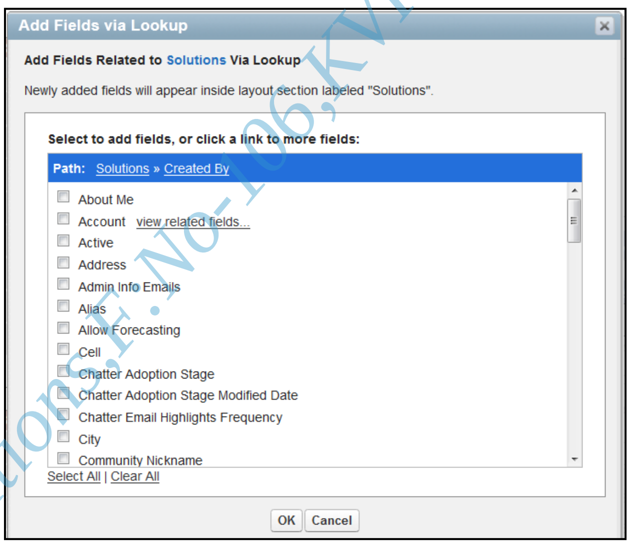





New Custom Report Type
Case Report Type
Help for this Page
Step 2. Define Report Records Set
Step 2 of 2
Previous
Save
Cancel
This report type will generate reports about Cases. You may define which related records from other objects are returned in report results by choosing a relationship to another object.
A
Cases
Primary Object
B
Solutions
--Select Object--
Activities
Case Comments
Content
Solutions
ast one related "B" record.
e related "B" records.
ject)
A
B
A
B


Object Relationships
Edit
Object Relationships Help
Cases (A)
with at least one related record from Solutions (B)
A
B
A
B
Fields Available for Reports
Edit Layout
Preview Layout
Fields Available for Reports Help
Source
Selected Fields
Cases
36
Solutions
16


Cases
Edit | Delete
Account Name
Asset
Business Hours
Case Currency
Case ID
Case Number
Case Origin
Case Owner
Case Reason
Closed
Closed by Sel...
Closed When C...
Contact Name
Created By
Date/Time Clo...
Date/Time Ope...
Description
Engineering R...
Escalated
Last Modified...
Last Modified...
New Self-Serv...
Parent Case
Potential Lia...
Priority
Product
Self-Service ...
SLA Violation
Status
Subject
Type
Visible in Se...
Web Company
Web Email
Web Name
Web Phone
Solutions
Edit | Delete
Author
Created By
Created Date
Currency Code
Is Html
Last Modified...
Last Modified...
Num Related C...
Reviewed
Solution Deta...
Solution ID
Solution Number
Legend
Not in Page Layout
Used in Page Layout
Selected
Checked by Default
Added via Lookup
View:
Solutions Fields
Add fields related via lookup »
Solutions Fields [Page1/1]
Author
Created By
Created Date
Currency Code
Is Html
Last Modified...
Last Modified...
Num Related C...
Reviewed
Solution Deta...
Solution ID
Solution Number


Add Fields via Lookup
Add Fields Related to Solutions Via Lookup
Newly added fields will appear inside layout section labeled "Solutions".
Select to add fields, or click a link to more fields:
Path: Solutions » Created By
About Me
Account view related fields...
Active
Address
Admin Info Emails
Alias
Allow Forecasting
Cell
Chatter Adoption Stage
Chatter Adoption Stage Modified Date
Chatter Email Highlights Frequency
City
Community Nickname
Select All | Clear All
OK
Cancel

Reports:-

A report returns a set of records that meets certain criteria and displays it in organized rows and columns. Report data can be filtered, grouped, and displayed graphically as a chart.

* Reports are stored in Folders, which control who has access.

* we must have "Read" permission on the records included in reports, otherwise when we run them they may be missing data or appear blank.

Report Folders:-

The Report Folders section allows us to choose the reports that are stored in specific folder.

* In salesforce CRM, we cannot save reports to the standard report folders, we can only save reports to the My Personal custom Reports folder, Unfiled Public Reports folder, or any Custom Report Folder where we have appropriate read/write access.

* Using the link, "Create New Folder" allows us to create new report folders for Custom reports.

Creating Report Folder:-

For creating Report Folder, follow the steps below.

* click on "Reports" tab.
* click on "New Report Folder" option in the left side of page.

* Enter Report Folder Label and Folder Unique Name.

* Give the Public Folder Access

  Read only → This access allow users to ~~rea~~ view the reports under this Folder.

  Read/write → This access allow users to view, edit the reports under this Folder.

* We can move reports from unfiled Public Reports folder.

* we must specify ~~the~~ the accessibility to users where we can select from either

  accessible by all users → All users can able to run the reports under this folder.

  hidden from all users → No user can view ~~the~~ any report under this folder.

  accessible by ~~Certain~~ following Users → Add the Public Groups
  Roles
  Roles & Subordinates

  only users belongs this categories can able run the reports under this folder.

* click on "Save" button.

***Note:
1. Deleted Reports and Dashboards can be retrieved from the recycle bin.
2. we cannot use the Reports search functionality to search for standard Reports.

Standard Vs Custom Reports:-

Standard Reports	Custom Reports
* Are built in	* Can be built from scratch.
* These reports are stored in standard folders	* ~~can be created~~ * Must be saved in a custom Personal or unfiled public Reports folder.
* Can not be ~~ex~~ edited or deleted	* Can be edited or deleted
* Can not be searched	* Can be searched.

Types of Reports:-

~~There~~ Salesforce supports four report formates each with varying degrees of functionality and complexity.

1. Tabular Report:-

↳ * Tabular Reports provides a simple listing of data without subtotals.

* Tabular Reports are most suited for creating lists of records or a list with a single grand total as they can not be used to group data.

2. Summary Reports:-

↳ * Summary report format provides a listing of data like a tabular report, plus sorting (grouping) and subtotaling of data.

* Summary Reports can be used to get subtotals based on the value of a particular field.

3. Matrix Reports:-

↳ * Matrix Report format provides totals for both rows and columns.

* Matrix reports allow us to group ~~rec~~ records both by row and column.

Note:- * Tabular reports can not be used ~~in dashboards~~ as source report for dashboard components

* Summary reports, Matrix reports can be used as the source report for dashboard components.

Creating Reports:-

The basic steps for creating new reports are:

1. Click on "Reports" tab, and click on "New Report..." button.
2. select the report type for the report, and click on "Create" button.
3. Customize the report ~~on~~, then save and run it.

* Give Report Name and Report Unique Name.
* Once we click on "Save" button, Use the Description field to describe exactly what the report is intended for (there is maximum of 255 characters
* Select "My Personal Custom Reports" or "Unfiled Public Reports" ~~to~~ Report Folder to store the custom report.

* Selecting the appropriate report type is one of the most important steps in creating a report. Report types allow pre-defined sets of records and fields to be available within a report based on the relationship between a primary object and any related objects.

Customizing Reports using Report Builder:-

Go to any report and click on "Customize" button. Report Builder will open. It is a visual editor for reports. The report builder interface consists of three panes.

Fields Pane:-

The fields pane lists all accessible fields in the selected report type, organized by Folder. Find the fields we want using the Quick Find search box and field type filters, then drag them into the preview pane to add them to the report

* We can create, view and delete our custom summary formulas in the Fields Pane as well.

Filters Pane:-

Set the view, time frame and custom filters to limit the data shown in the report.

Preview Pane:-

In this Preview Pane, we can add, reorder and remove columns, summary fields, formulas and groupings. change the report format and display options, or add a chart.

The Preview shows only a limited number of records. Run the report to see all results.

Creating Charts:-

To add or edit a chart.

1. click on "Add chart" in report builder. Our report must have at least one grouping before we can add a chart. For existing charts, click "Edit chart".
2. Select a chart type
3. Enter the appropriate settings on the chart Data tab for the chart type we selected.
4. Enter the appropriate settings on the Formatting tab.
5. click "OK".

Types of charts:-

i) Horizontal Bar chart
ii) Vertical Bar chart
iii) Line chart
iv) Pie chart
v) Donut chart
vi) Funnel chart
vii) Scatter chart.

Scheduling and Emailing Reports:-

* To schedule Report:

  * click on "Reports" tab and click an existing report name
  * click "Run Report" and choose schedule Future Runs... from the drop-down.
  * Select a notification settings to email the report at the scheduled time.
    * select "To me" to send the report to the email address specified on salesforce user record.
    * Select "To me and/or others..." to email the report to additional users.
  * Schedule the report:

    → In the Frequency field, select how frequently to run the report. select Daily, weekly or monthly and then refine the frequency criteria.

    → In the start and End fields, specify the dates during which we want to schedule the report.

    → We must select a start time for running the report. Next to Preferred start Time, click Find Available options... to choose a start time.

* Click "Save Report schedule" to schedule the report.

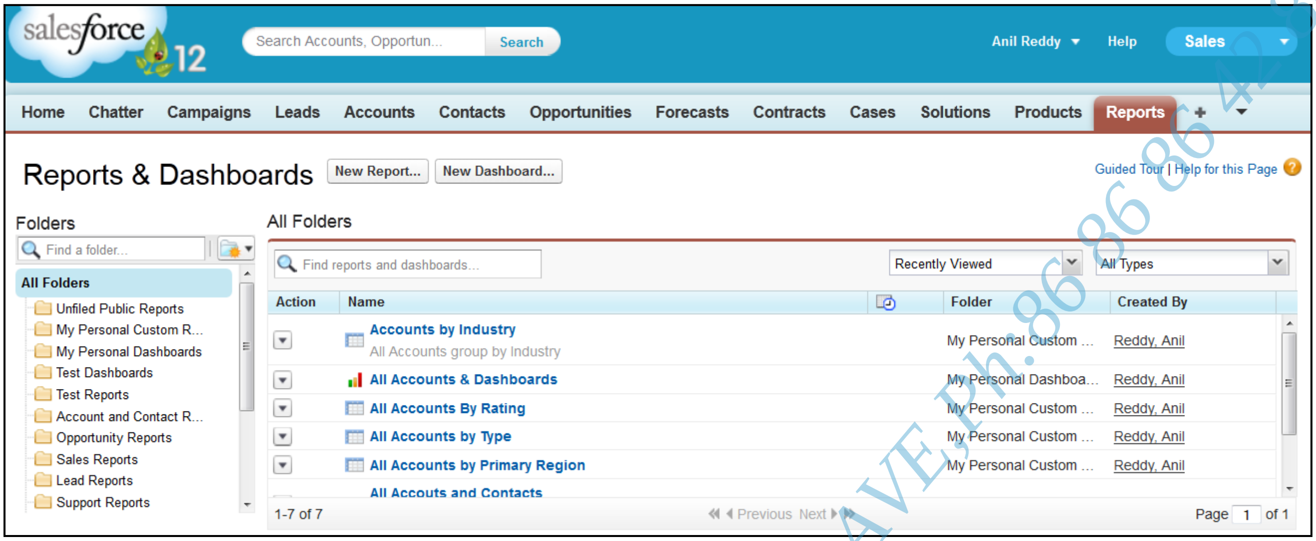
Exporting Reports:-

To export a report, users can perform the following steps:

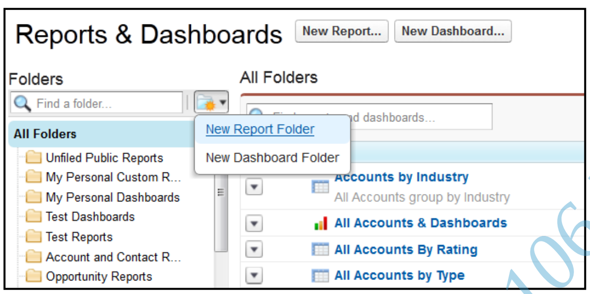
* click on any existing report name
* click on "Export Details" button
* set the default option in the Export File Encoding
* Set the Export File Format to either Excel or CSV (Comma delimited).
* click on 'Export' button
* In the browser's File Download dialog, they can choose where to save the file to on their local disk.

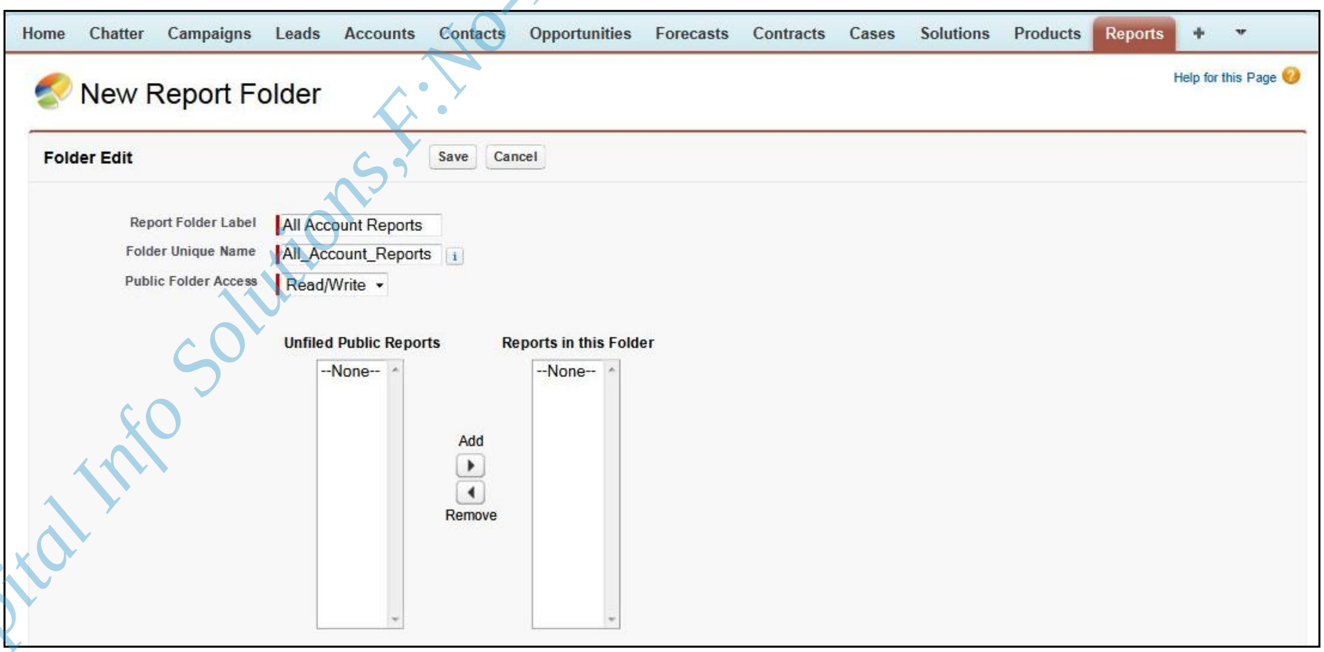
Note: Upto 256 columns and 65,536 rows of data can be exported from a report.

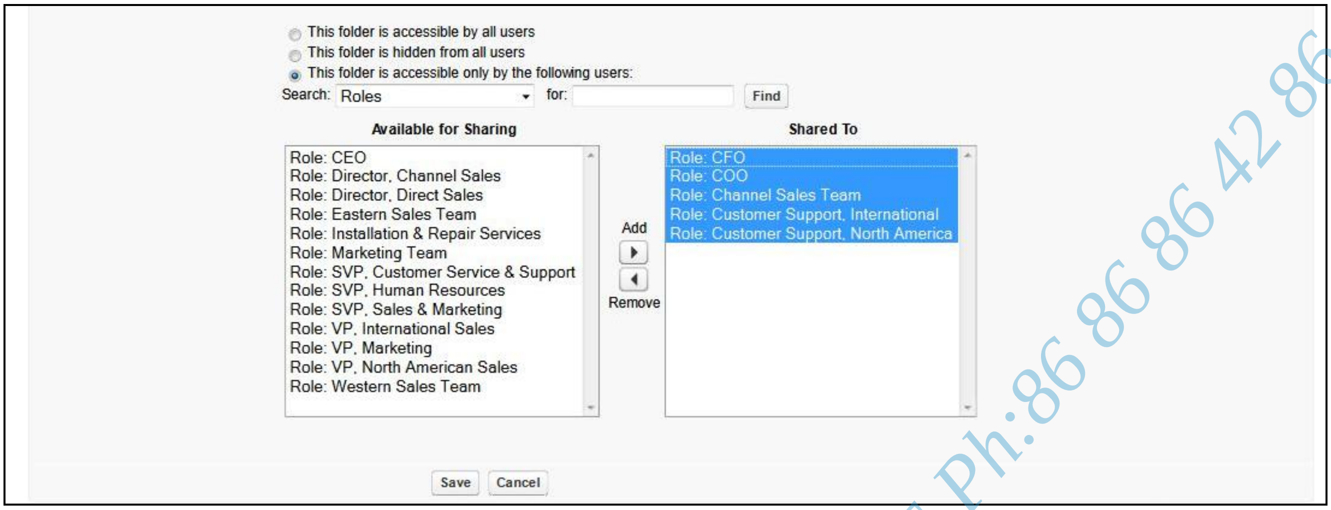
Reports:



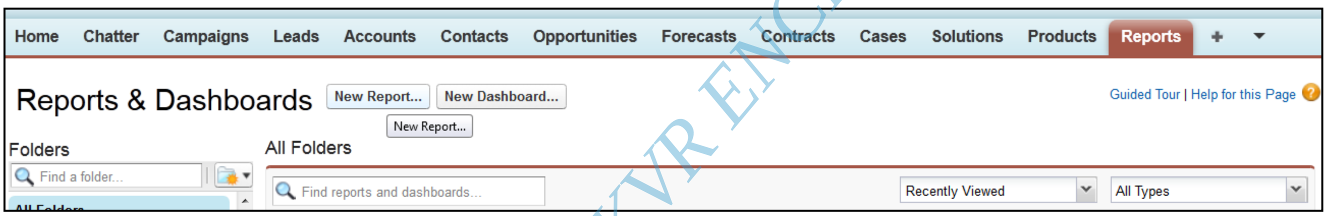
The following screenshot shows the creation of new Report Folder

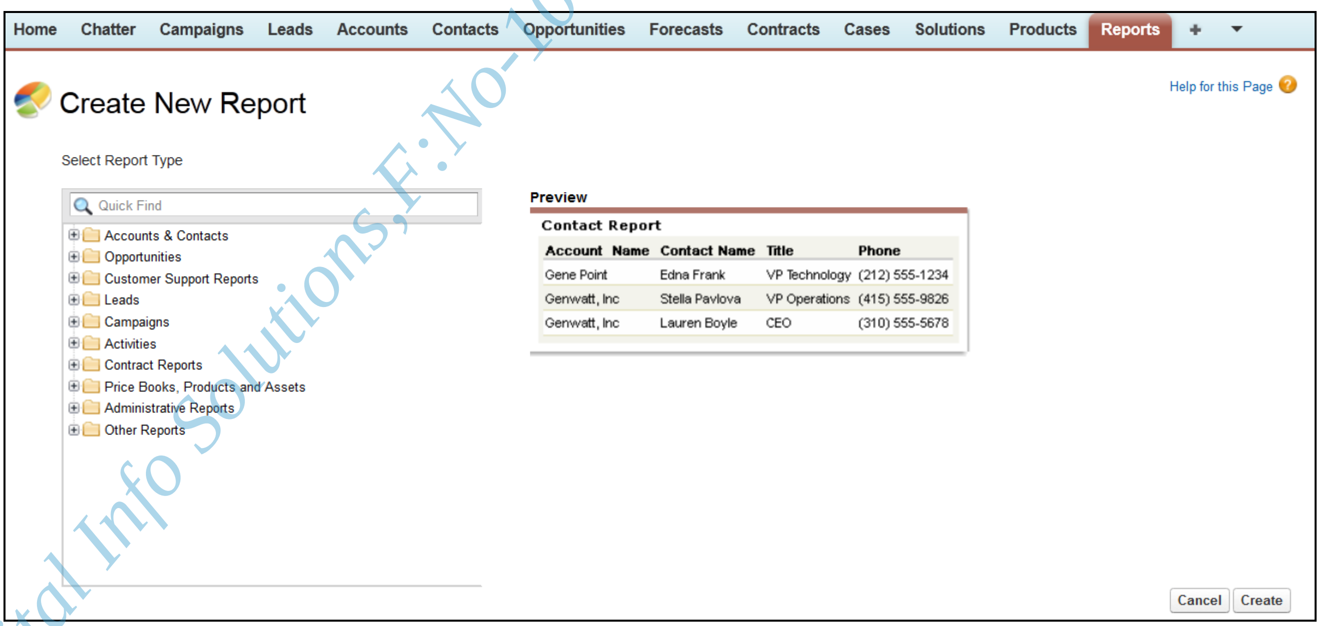


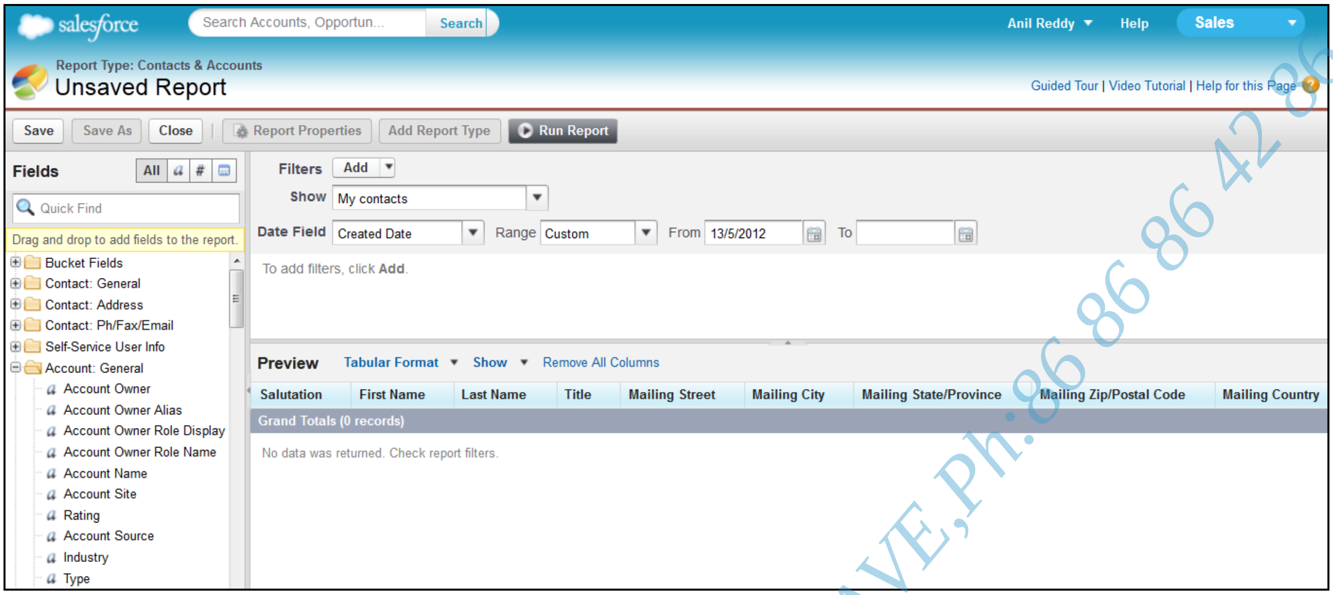


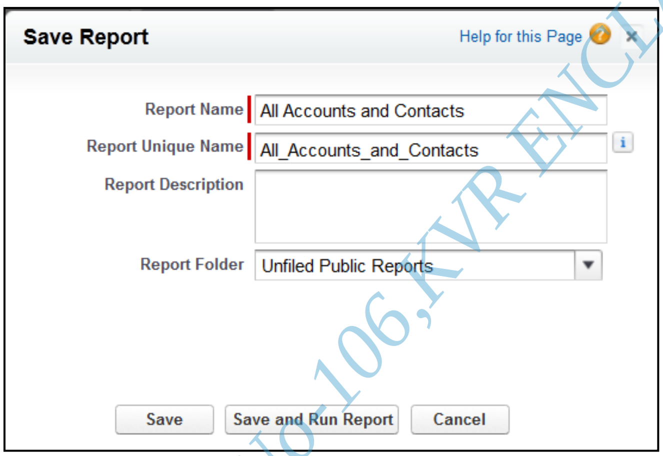


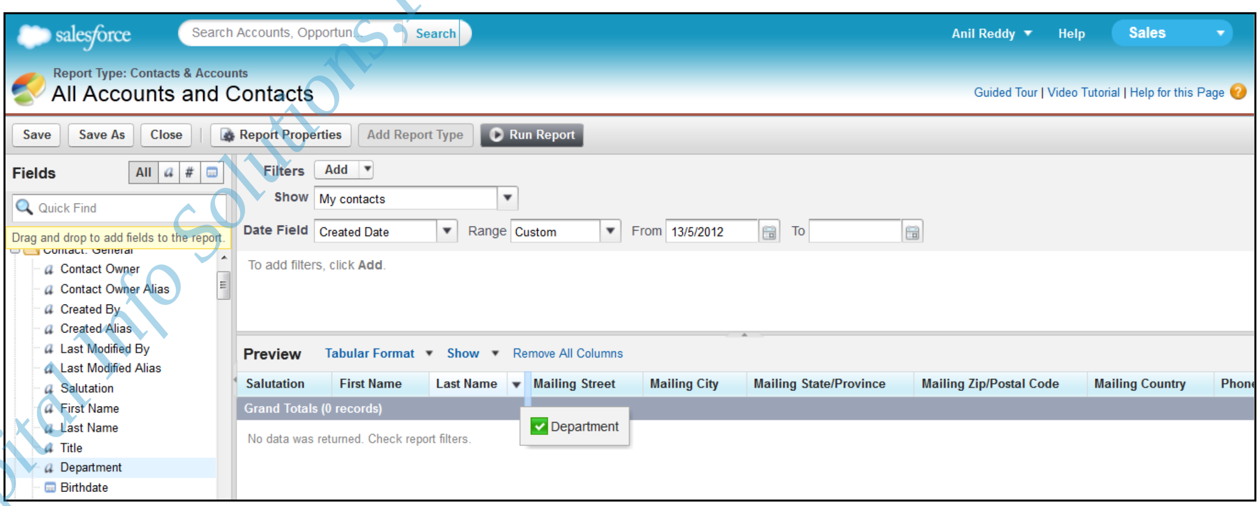
Creating the Reports:

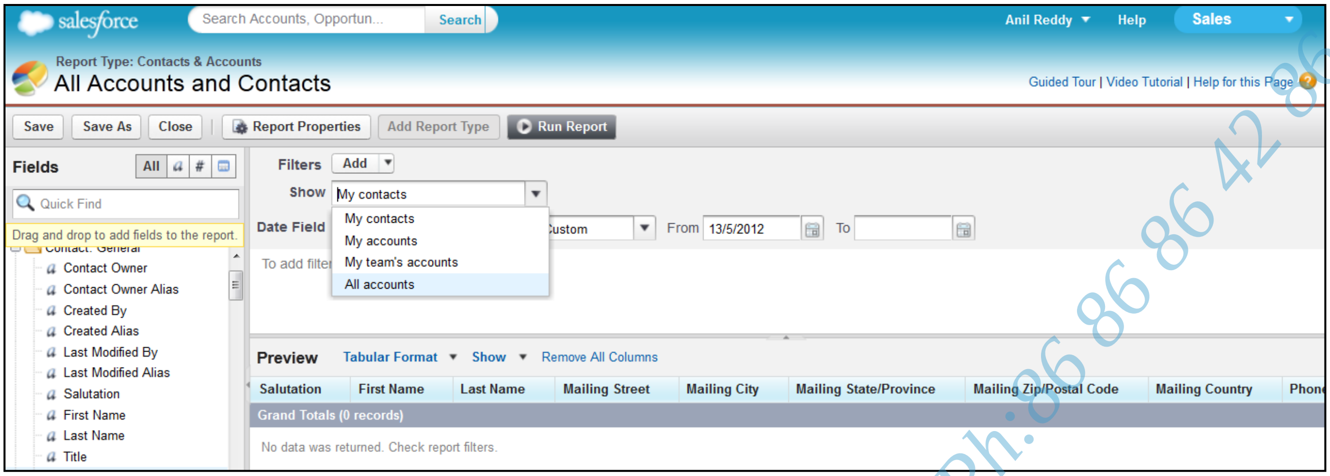


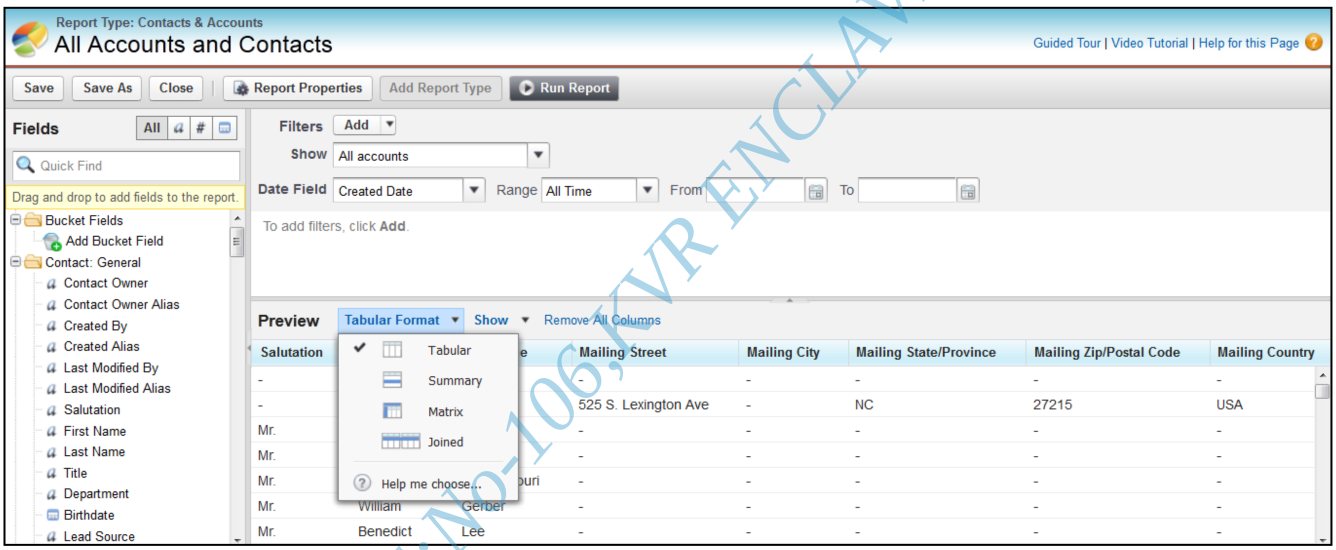



salesforce
Search Accounts, Opportun...
Search
Anil Reddy
Help
Sales
Report Type: Contacts & Accounts
Unsaved Report
Guided Tour | Video Tutorial | Help for this Page
Save
Save As
Close
Report Properties
Add Report Type
Run Report
Fields
All
Quick Find
Drag and drop to add fields to the report.
Bucket Fields
Contact: General
Contact: Address
Contact: Ph/Fax/Email
Self-Service User Info
Account: General
Account Owner
Account Owner Alias
Account Owner Role Display
Account Owner Role Name
Account Name
Account Site
Rating
Account Source
Industry
Type
Filters
Add
Show
My contacts
Date Field
Created Date
Range
Custom
From
13/5/2012
To
To add filters, click Add.
Preview
Tabular Format
Show
Remove All Columns
Salutation
First Name
Last Name
Title
Mailing Street
Mailing City
Mailing State/Province
Mailing Zip/Postal Code
Mailing Country
Grand Totals (0 records)
No data was returned. Check report filters.


Save Report
Help for this Page
Report Name
All Accounts and Contacts
Report Unique Name
All_Accounts_and_Contacts
Report Description
Report Folder
Unfiled Public Reports
Save
Save and Run Report
Cancel

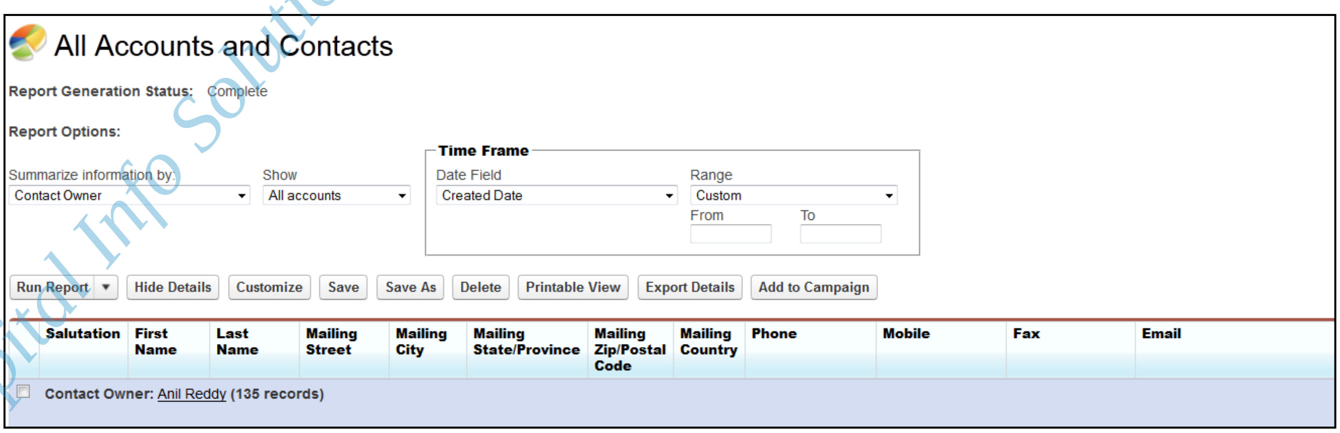

salesforce
Search Accounts, Opportun...
Search
Anil Reddy
Help
Sales
Report Type: Contacts & Accounts
All Accounts and Contacts
Guided Tour | Video Tutorial | Help for this Page
Save
Save As
Close
Report Properties
Add Report Type
Run Report
Fields
All
Quick Find
Drag and drop to add fields to the report.
Contact Owner
Contact Owner Alias
Created By
Created Alias
Last Modified By
Last Modified Alias
Salutation
First Name
Last Name
Title
Department
Birthdate
Filters
Add
Show
My contacts
Date Field
Created Date
Range
Custom
From
13/5/2012
To
To add filters, click Add.
Preview
Tabular Format
Show
Remove All Columns
Salutation
First Name
Last Name
Mailing Street
Mailing City
Mailing State/Province
Mailing Zip/Postal Code
Mailing Country
Grand Totals (0 records)
Department
No data was returned. Check report filters.

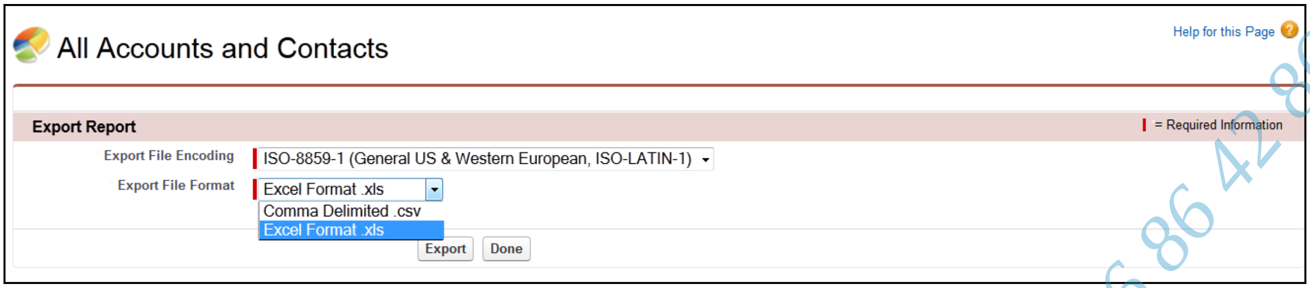




Exporting Report:

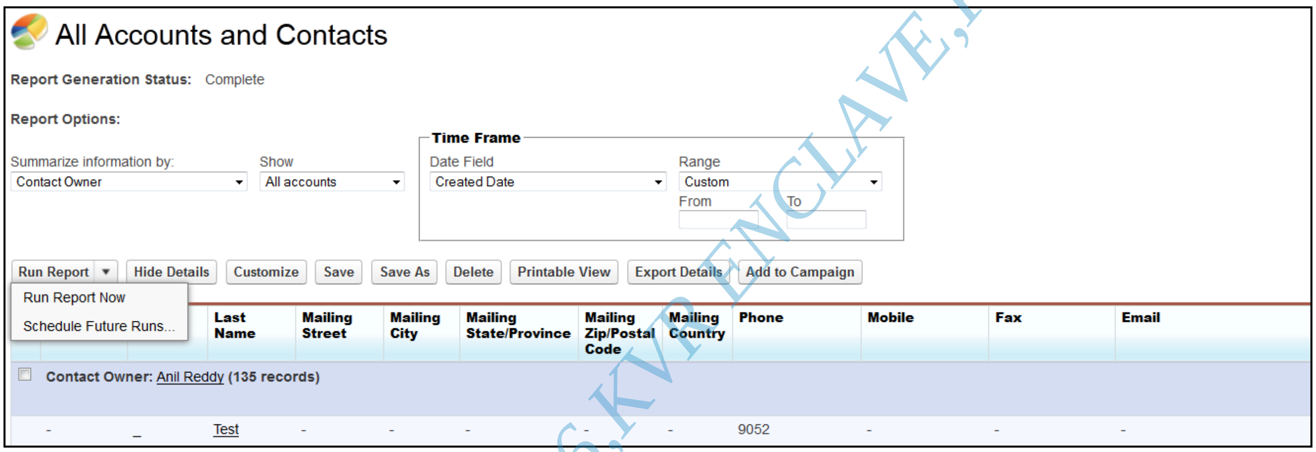
Click on any Report name and click on "Export Details" button

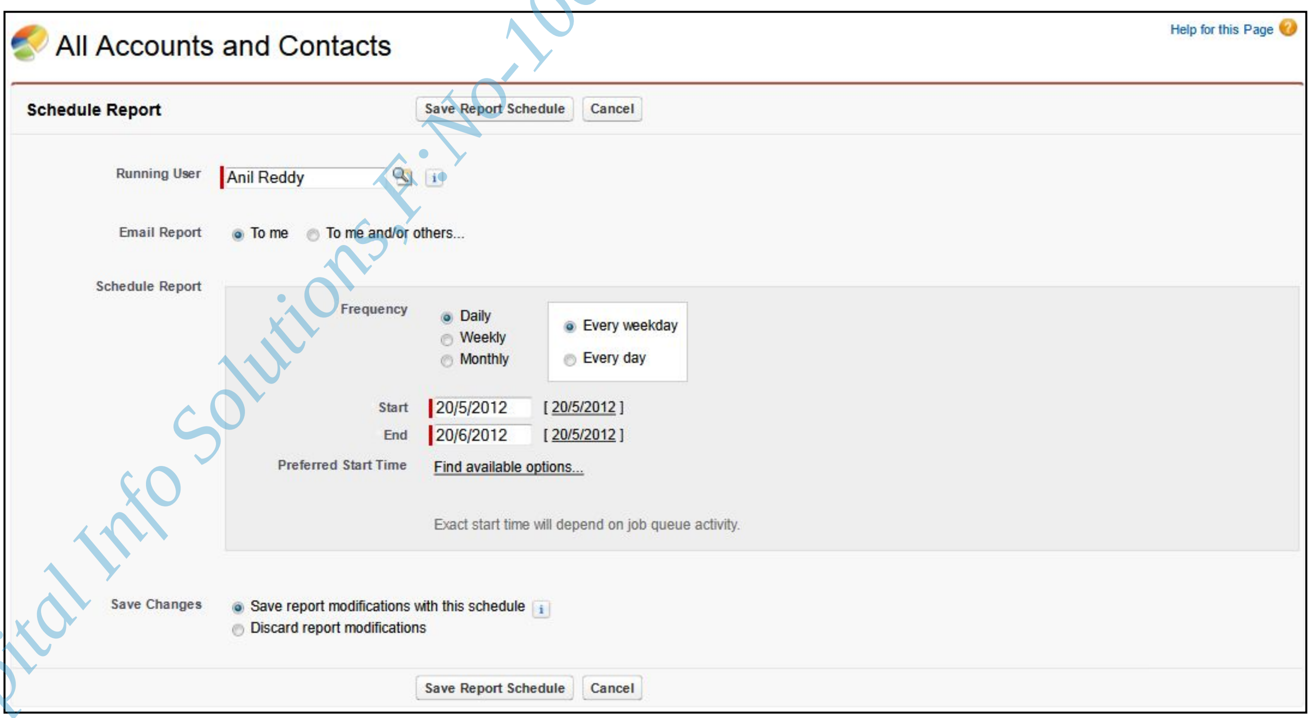




Scheduling Reports:

Click on any report name and click on down arrow mark next to "Run Report" button and click on "Schedule Future Runs..." option





Dashboards:-

A dashboard shows the data from source reports (Summary reports, Matrix reports) as visual components, which can be charts, guages, tables, metrics or visualforce pages.

* Each dashboard can have upto 20 components.
* Administrators control access to dashboards by storing them in folders with certain visibility settings
* Dashboards folders can be public, hidden or restricted to groups, roles. If we have access to a folder, we can view its dashboards.

Components:-

1. Horizontal Bar chart → Barcharts
2. Vertical Bar chart → Compare two or more groupings
3. Line chart → connect a series of points that represent individual data measurements.
4. Pie chart → * Compare the parts that make up a whole
   * Good for seeing how much each part contributes to an overall total.
5. Donut chart → show proportion of individual groupings to each other, and to the total.
6. Funnel chart → Good for identifying bottlenecks (large components)

Data Sources:-

7. Gauge → Gauge component type may be used to show a single value that is to be shown as a part of a range of custom set values.

8. Metric → Metric component types used to show a single value to display (i.e total value)

9. Table → Table component types are used to show a set of report data in column form.

10. Visualforce Page → Visualforce page component types may be used to create a custom component type and present information in a way not available in the standard dashboard component types

Data Sources:-

* Reports and visualforce pages are the sources to cre-ate a dashboard.

* Only Custom Reports are the sources for the Dashboards.

Note: Dashboards are generally graphical representation of Summary, Matrix reports.

* We cannot create dashboard for the tabular report when we drag the tabular report into the dashboard compo-nent. Then we will get the error. The data will not be displayed.

Creating Dashboards:-

Before creating dashboards, create the custom reports containing the data we want to display. Make sure that these reports in folders have the access to users.

1. click the Dashboards tab.
2. click Go To Dashboard List.
3. click "New Dashboard..." button to create a new Dashboard.

   To modify an existing dashboard, click its name from the list.
4. Customize dashboard and click Save.

Customizing Dashboards:-

Dashboard builder is a drag-drop interface for creating and modifying ~~records~~ dashboards.

To customize a dashboard, view it and click "Edit". Dashboard Builder Contains following controls.

Dashboard-Level Controls:-

→ click "Dashboard Properties" to change the title, unique-name, folder and component settings.

→ click "Save" button and Give the title, Dashboard Unique Name and folder to save.

→ View or set the running user for the dashboard.

→ click the text field at the top of the dashboard to add a description.

Column-Level Controls:-

* click '+' to add a new column. Dashboards can have up to three columns.

* click 'x' for column to delete. Dashboards must have at-least two columns.

* select Narrow, Medium, or wide in the drop-down to set a column's width.

* Drag the Dashboards Components from left side to the right columns and drag data sources i.e reports into the dashboard Components.

Selecting a Dashboard Running User:-

Each dashboard has a running user, whose security settings determine which data to display in a dashboard.

To select the running user for a dashboard:-

1. Edit a dashboard.
2. In the View dashboard as field, enter a running user. Enter "*" to see all available users
3. Save the dashboard.

The running user ~~permission~~ options are:

1. Edit a dashboard
2. click the drop down button next to "View dashboard as" field.

3. choose ~~a~~ the dashboard type.

Run as specified user → The dashboard runs using the security settings of that single specific user. All users with access to the dashboard see the same data regardless of their own security settings.

Run as logged-in-user → A dynamic dashboards run using the security settings of the user viewing the dashboad. Each user sees the dashboard according to his or her own access level.

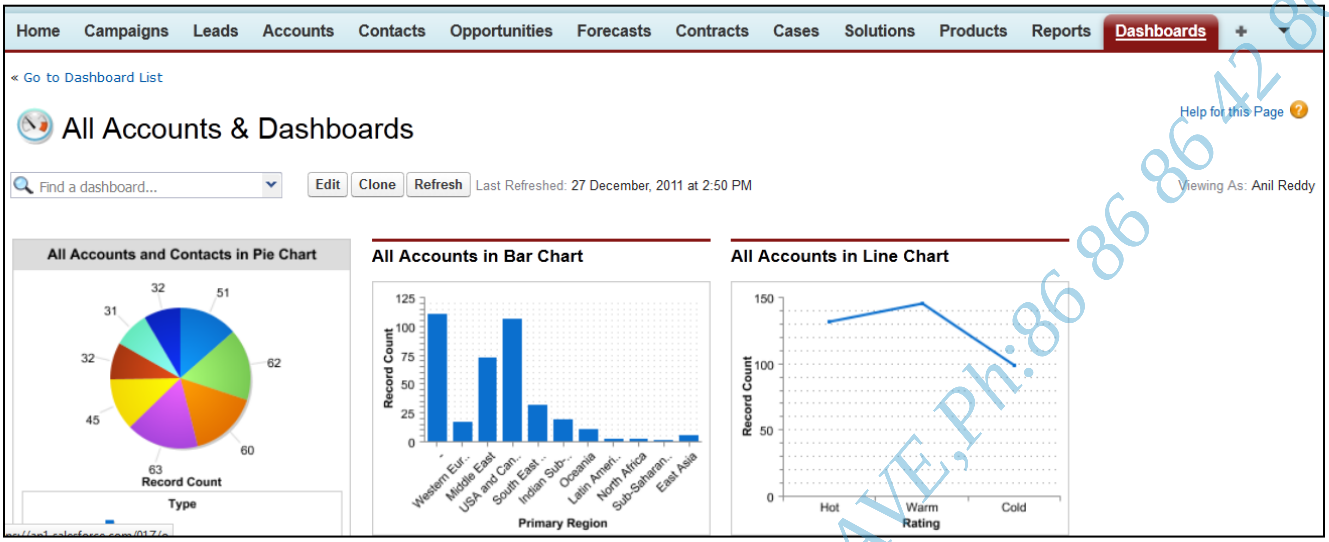
* Optionally select "Let authorized users change running user"

4. Click "OK".

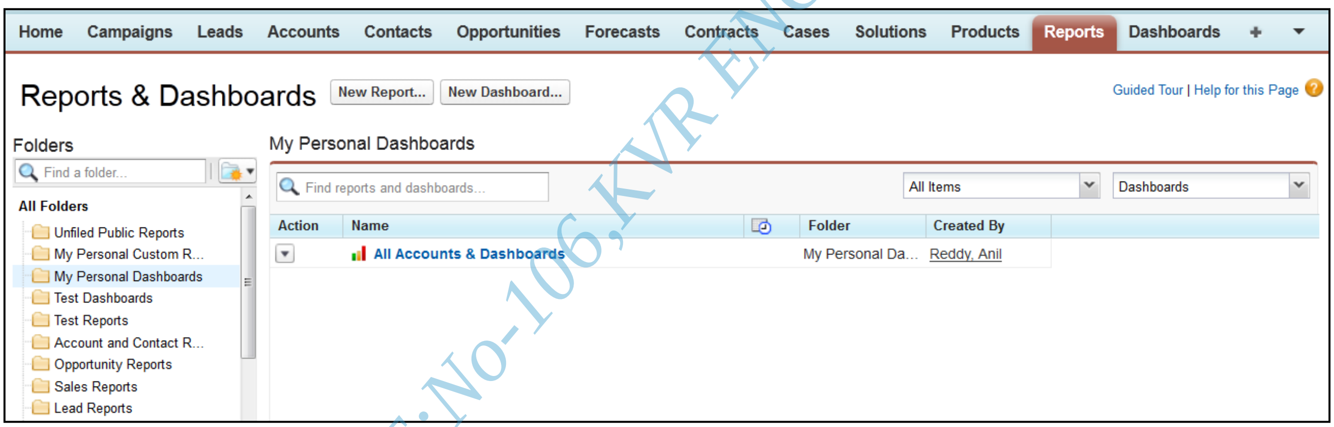
5. Save the dashboard.

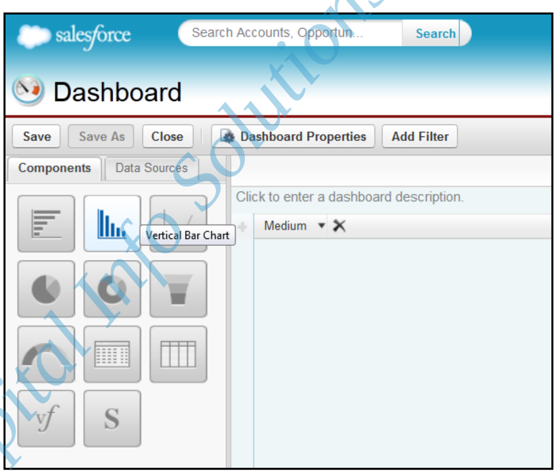
It enable permission to change the running user on the dashboard view page.

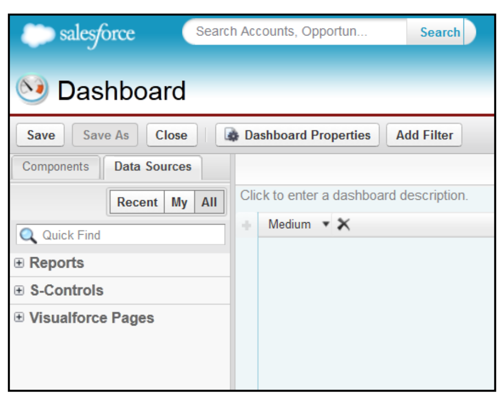
Dashboards:

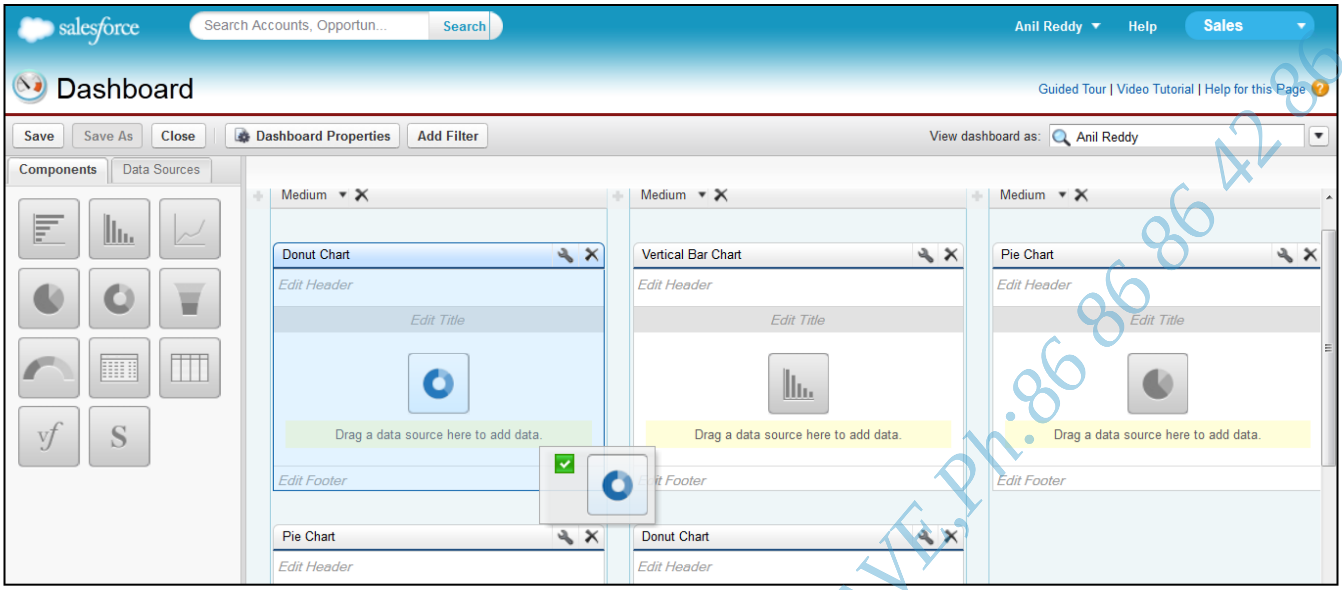


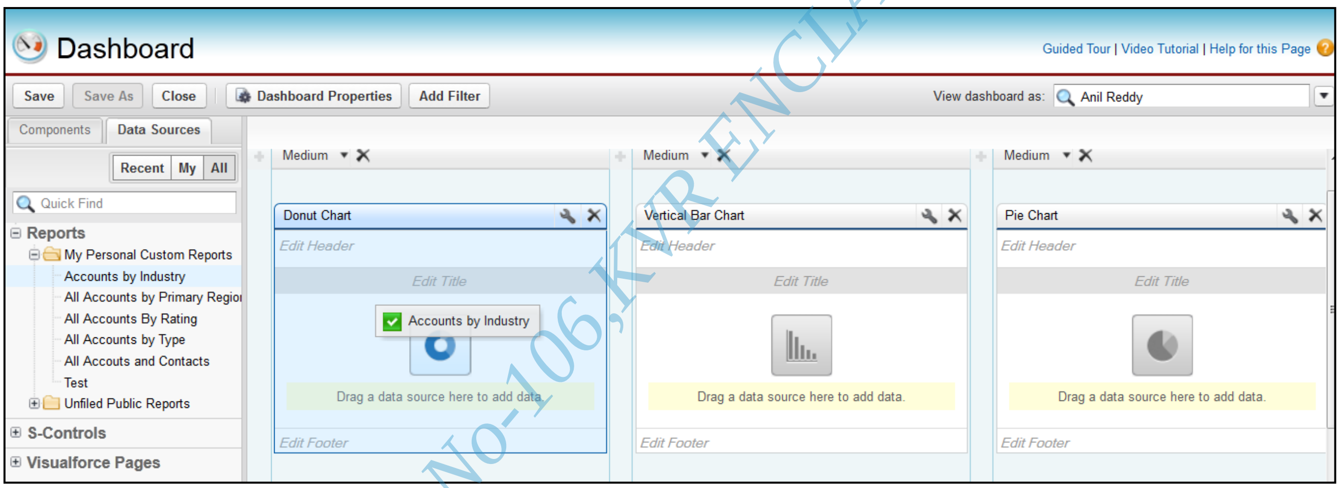
Click on "New Dashboard" button








salesforce
Search Accounts, Opportun...
Search
Anil Reddy
Help
Sales
Dashboard
Guided Tour | Video Tutorial | Help for this Page
Save
Save As
Close
Dashboard Properties
Add Filter
View dashboard as:
Anil Reddy
Components
Data Sources
Medium
Donut Chart
Edit Header
Edit Title
Drag a data source here to add data.
Edit Footer
Vertical Bar Chart
Pie Chart
Donut Chart


Dashboard
Guided Tour | Video Tutorial | Help for this Page
Save
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Dashboard Properties
Add Filter
View dashboard as:
Anil Reddy
Components
Data Sources
Recent
My
All
Quick Find
Reports
My Personal Custom Reports
Accounts by Industry
All Accounts by Primary Regio
All Accounts By Rating
All Accounts by Type
All Accouts and Contacts
Test
Unfiled Public Reports
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Edit Header
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Accounts by Industry
Drag a data source here to add data.
Edit Footer
Vertical Bar Chart
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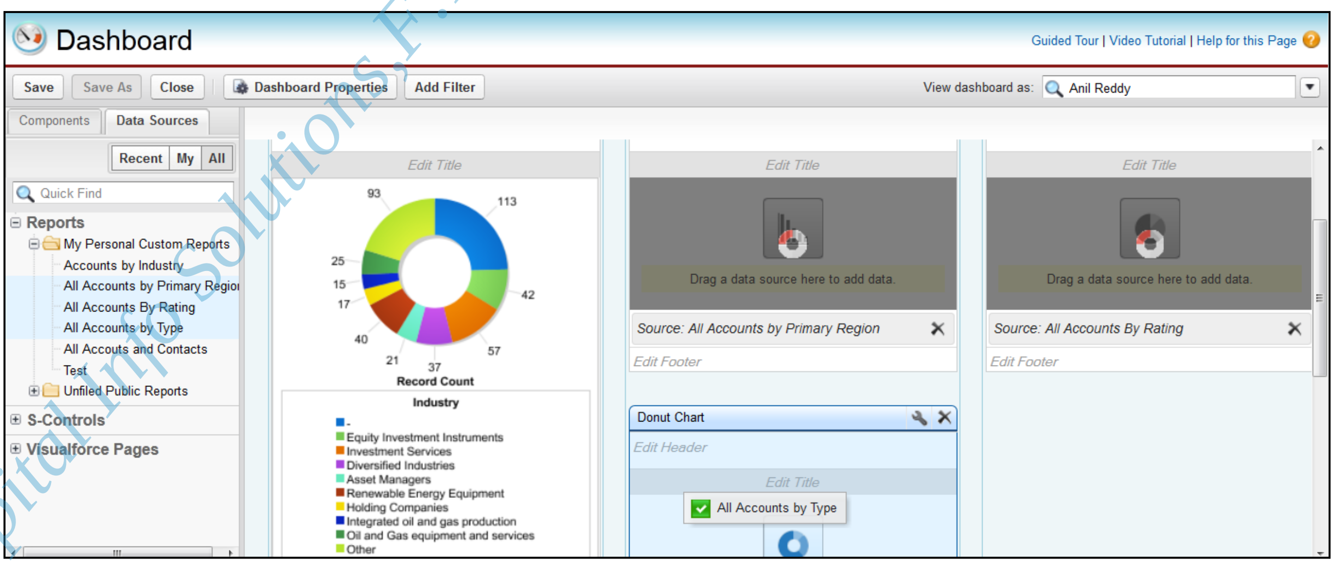
Dashboard
Guided Tour | Video Tutorial | Help for this Page
Save
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Dashboard Properties
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Components
Data Sources
Recent
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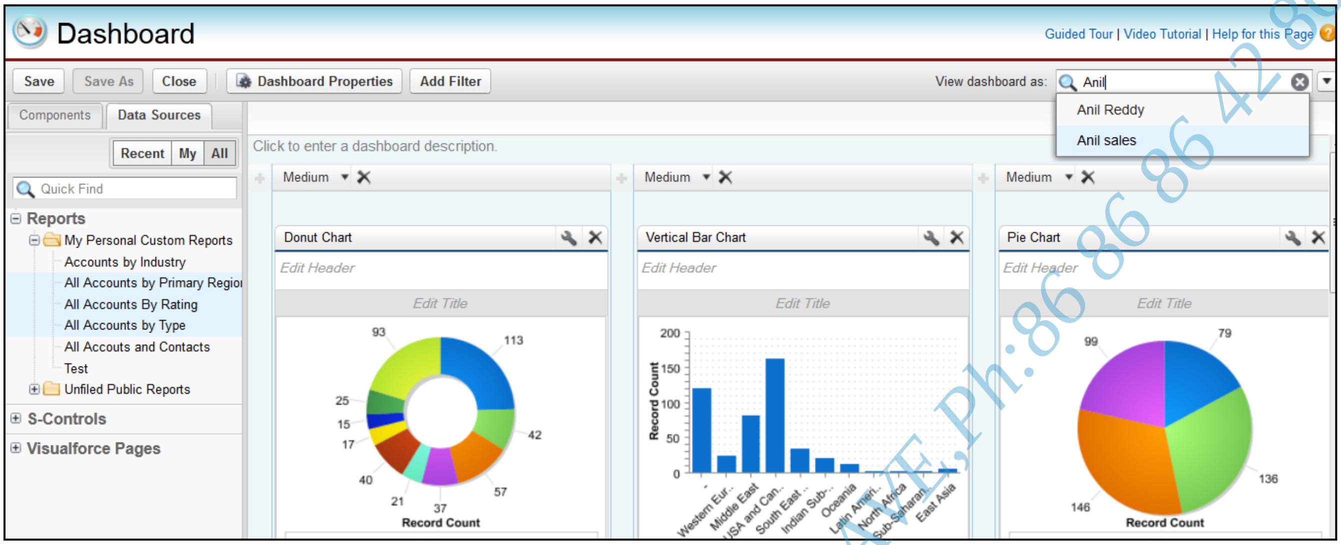
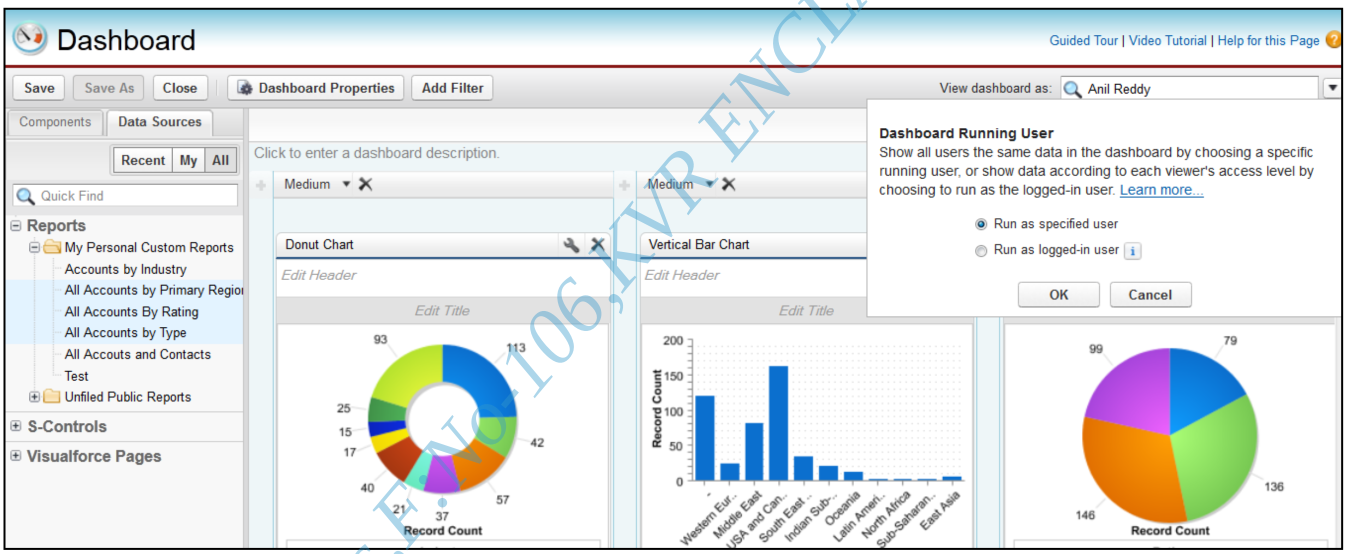
All
Quick Find
Reports
My Personal Custom Reports
Accounts by Industry
All Accounts by Primary Regio
All Accounts By Rating
All Accounts by Type
All Accouts and Contacts
Test
Unfiled Public Reports
S-Controls
Visualforce Pages
Edit Title
93
113
25
15
17
42
40
21
37
57
Record Count
Industry
Equity Investment Instruments
Investment Services
Diversified Industries
Asset Managers
Renewable Energy Equipment
Holding Companies
Integrated oil and gas production
Oil and Gas equipment and services
Other
Drag a data source here to add data.
Source: All Accounts by Primary Region
Source: All Accounts By Rating
Edit Footer
Donut Chart
Edit Header
All Accounts by Type

Dashboard Running User:





Groups:-

Groups are set of users. They contain individual users, other groups, the users in a particular role, the users in a particular role plus all of the users below that role in the hierarchy.

There are two types of groups.

1. Public Groups
   ↳ Only administrators can create public groups. They can be used by everyone in the organization
2. Personal Groups
   ↳ Each user can create groups for their personal use.

Public Groups:-

Public Groups are set of users and they are used in a

→ sharing rule

→ give access to folders

→ Email alerts

* Public Groups can be made up of any Combination of.

→ Users

→ Roles

→ Roles and subordinates

→ Public Groups

* When the public Groups are made up of roles or roles and subordinates, when a user is added or removed from the role, the public group membership is updated.

Creating Public Groups:-

Go to the following path

Your Name
↳ setup
↳ Administration setup
↳ Manage Users
↳ click on "Public Groups".
↓

1. click on "New" button.

2. Give the Label and Group Name of public group.

3. For public groups only, select "Grant Access Using Hierarchies" to allow automatic access to records using role hierarchies. when selected, any records shared with users in this group are also shared with users higher in the hierarchy.

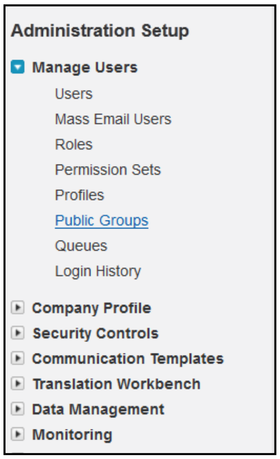
If "Grant Access Using Hierarchies" is deselected, users that are higher in the role hierarchy don't receive automatic access.

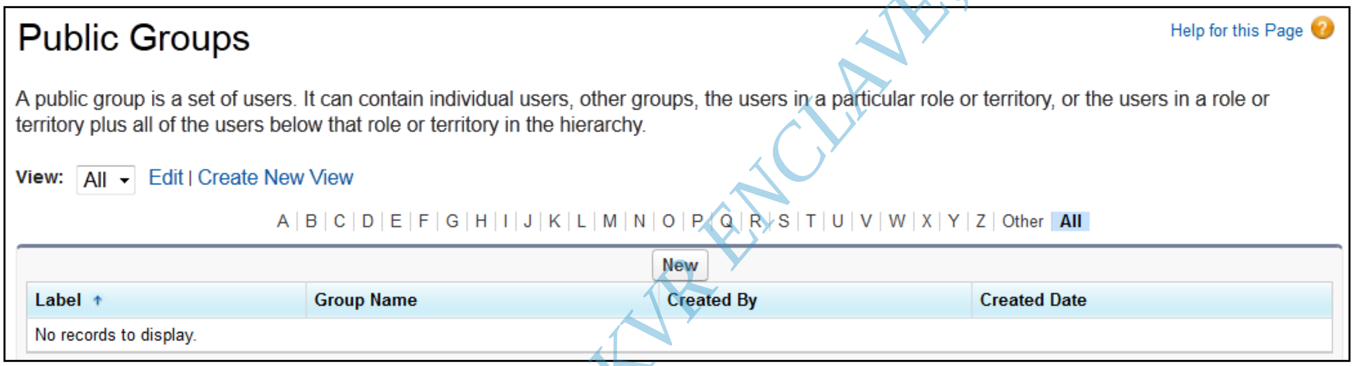
4. From the "Search" drop-down list, select the type of member to add. If we don't see the member we want to add, enter keywords in the search box and ~~fin~~ click "Find".

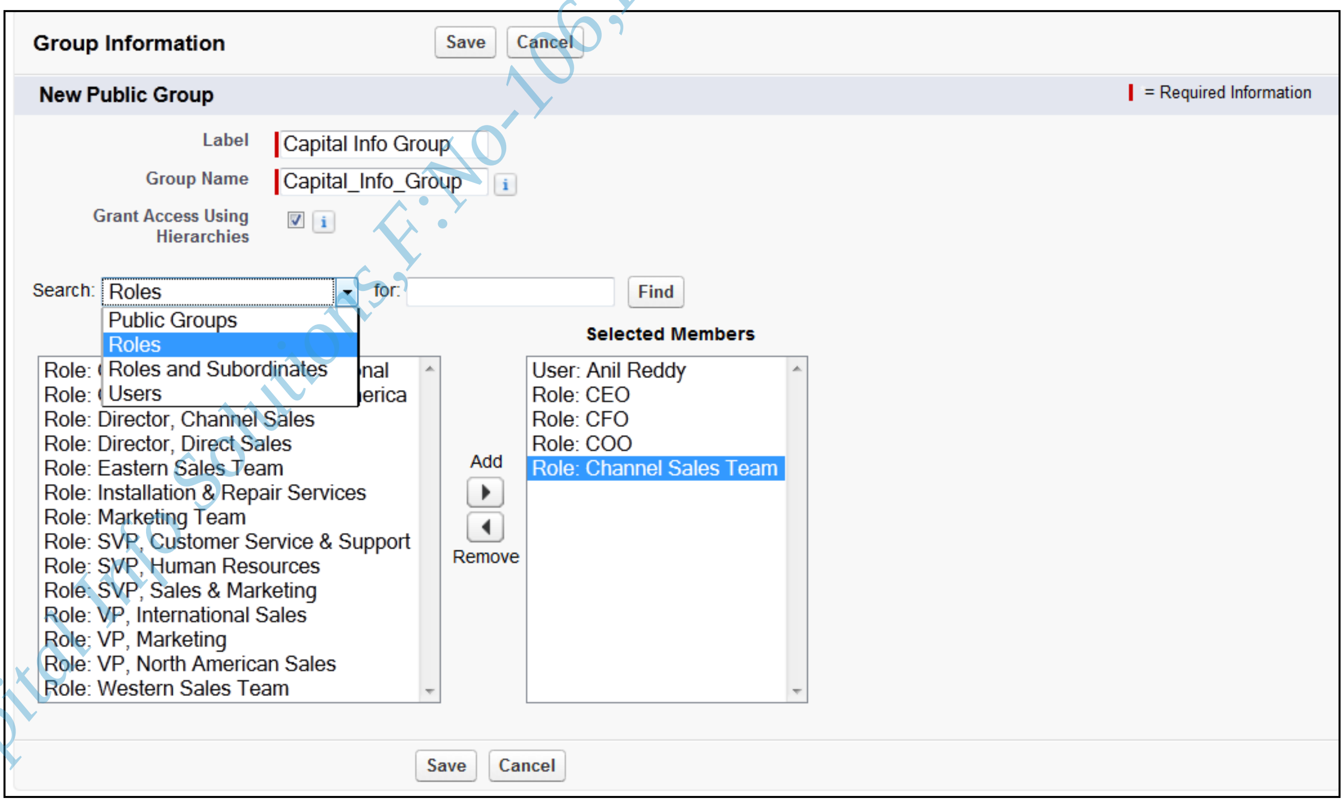
5. Select members from the available members box, and click "Add" to add them to the group.

6. click "Save" button.

Public Groups:







Queues:-

* Queues allow groups of users to manage a shared workload more effectively.

* A queue is a location where records can be routed to await processing by a group member.

* The records remain in the queue until a user accepts them for processing or they are transferred to another queue.

* We can specify the set of objects that are supported by each queue.

* We can also specify the set of users that are allowed to retrieve records from the queue.

* **Note:** 1. We can create Queues for Cases, Leads and Custom objects.

2. Whenever we create a case queue, lead queue salesforce automatically generates a case list view, lead list view to enable users to access the records in the queue.

3. Case records can be assigned to queues manually or automatically using Assignment rules. Case Queues and Assignment rules are very similar to the queues and assignment rules available for leads.

Creating Queues:-

Go to the following path

Your Name

↳ Setup

↳ Administration setup

↳ Manage Users

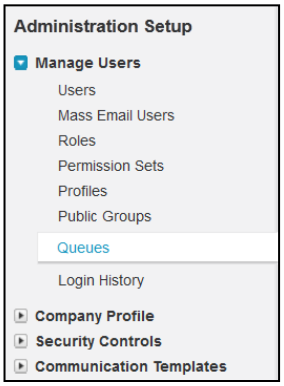
↳ click on "Queues"

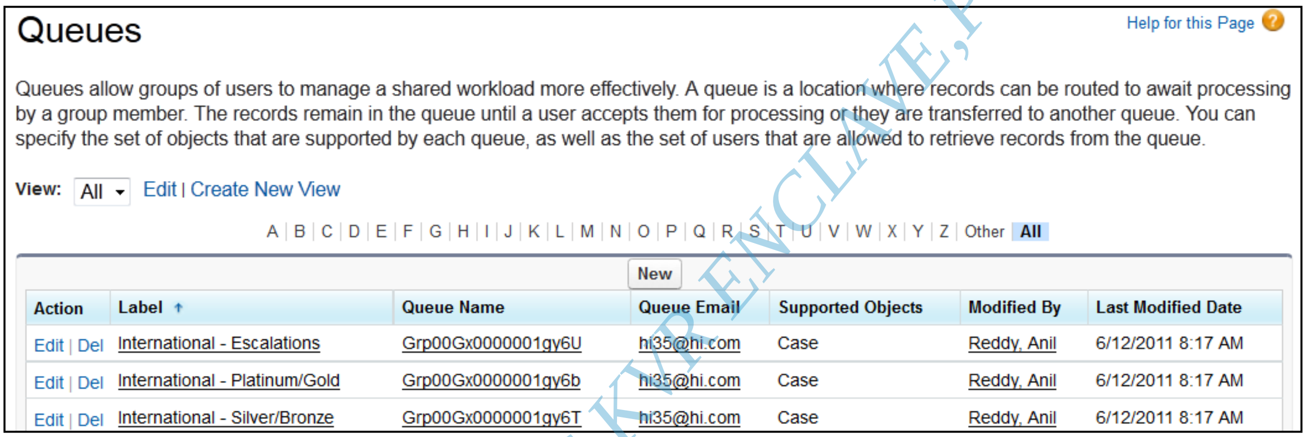
↓

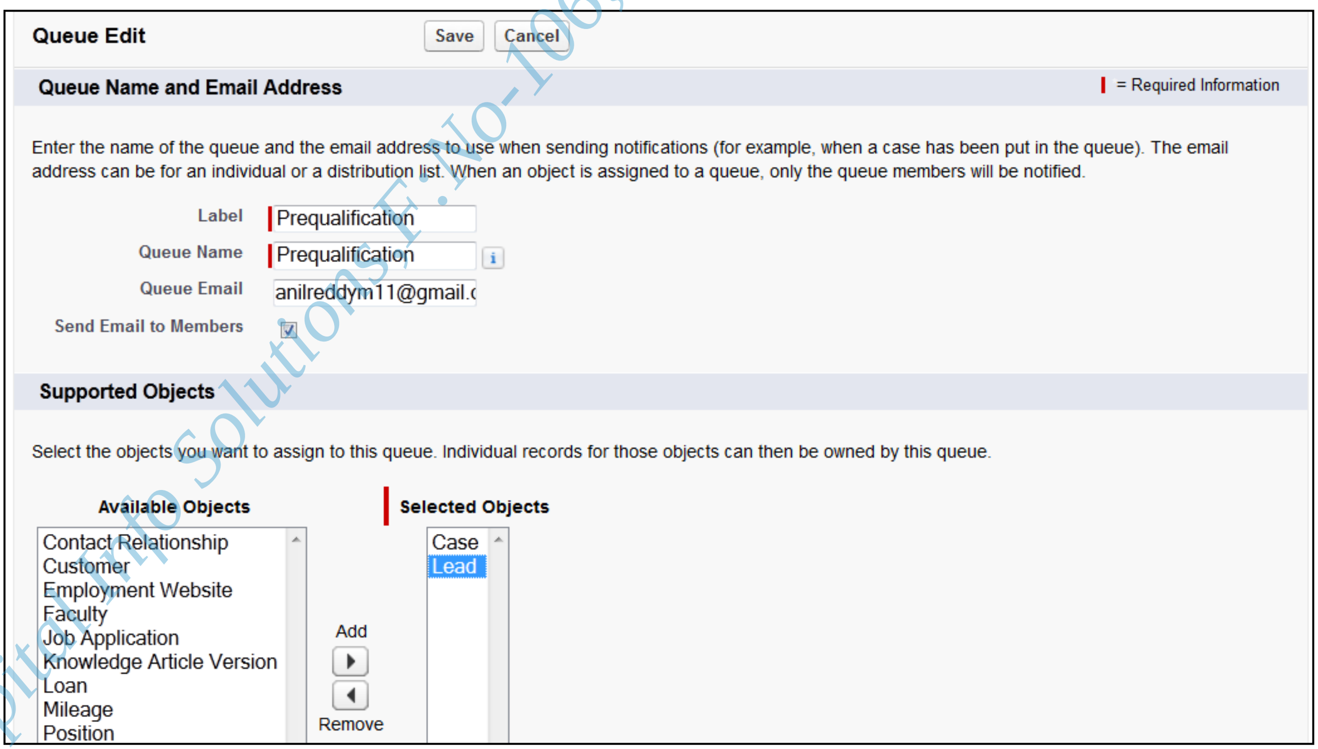
1. click on "New" button
2. Enter the Label and Queue Name.
3. To Notify one email address when new records are placed in the queue, add an email address to "Queue Email".

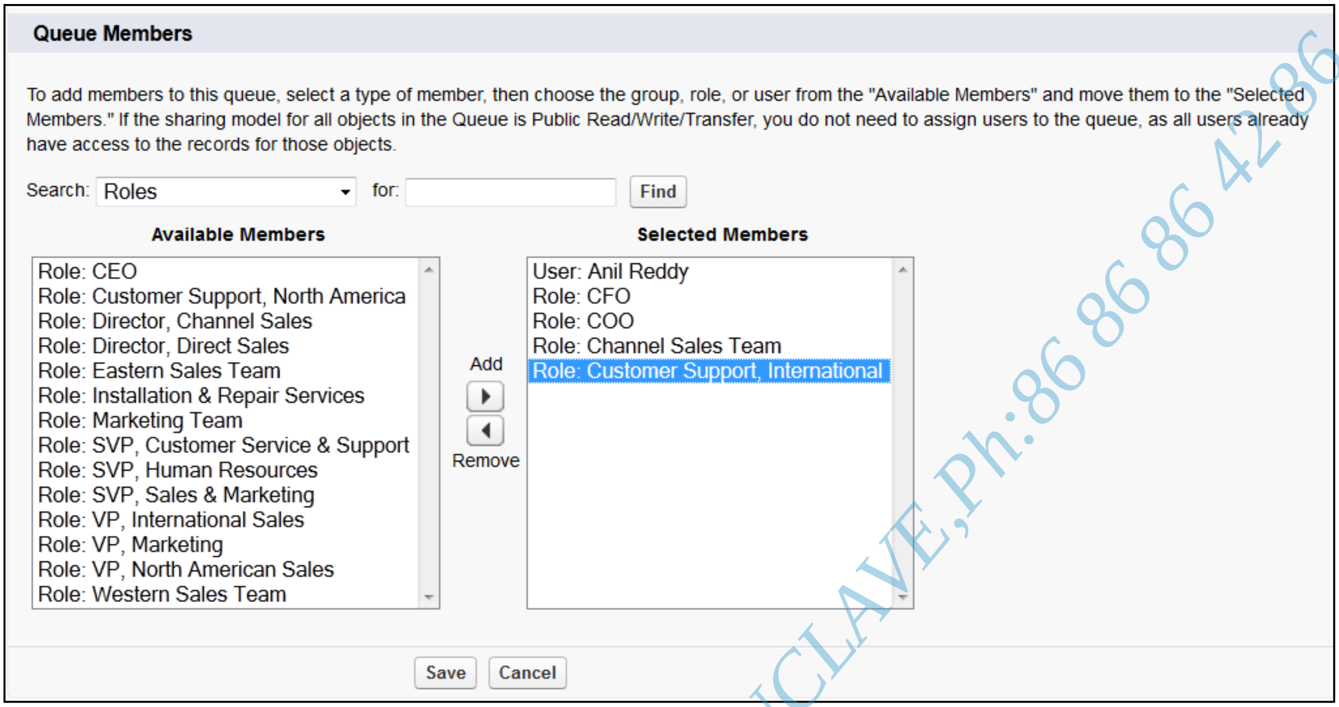
   *To Notify all queue members and the Queue Email individually when the new records are placed in the queue, add an email address to "Queue Email" and check "Send Email to Members" checkbox.
4. Select the Objects we want to assign to Queue from available objects (case, Lead, Custom objects) to the selected objects.
5. Add the members to this queue.
6. click on "Save" button.

Queues:


Administration Setup
Manage Users
Users
Mass Email Users
Roles
Permission Sets
Profiles
Public Groups
Queues
Login History
Company Profile
Security Controls
Communication Templates


Queues
Help for this Page
Queues allow groups of users to manage a shared workload more effectively. A queue is a location where records can be routed to await processing by a group member. The records remain in the queue until a user accepts them for processing or they are transferred to another queue. You can specify the set of objects that are supported by each queue, as well as the set of users that are allowed to retrieve records from the queue.
View: All 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
New
Action | Label | Queue Name | Queue Email | Supported Objects | Modified By | Last Modified Date
Edit | Del | International - Escalations | Grp00Gx0000001gy6U | hi35@hi.com | Case | Reddy, Anil | 6/12/2011 8:17 AM
Edit | Del | International - Platinum/Gold | Grp00Gx0000001gy6b | hi35@hi.com | Case | Reddy, Anil | 6/12/2011 8:17 AM
Edit | Del | International - Silver/Bronze | Grp00Gx0000001gy6T | hi35@hi.com | Case | Reddy, Anil | 6/12/2011 8:17 AM


Queue Edit
Save
Cancel
Queue Name and Email Address
= Required Information
Enter the name of the queue and the email address to use when sending notifications (for example, when a case has been put in the queue). The email address can be for an individual or a distribution list. When an object is assigned to a queue, only the queue members will be notified.
Label Prequalification
Queue Name Prequalification
Queue Email anilreddym11@gmail.c
Send Email to Members
Supported Objects
Select the objects you want to assign to this queue. Individual records for those objects can then be owned by this queue.
Available Objects
Contact Relationship
Customer
Employment Website
Faculty
Job Application
Knowledge Article Version
Loan
Mileage
Position
Add
Remove
Selected Objects
Case
Lead


Queue Members
To add members to this queue, select a type of member, then choose the group, role, or user from the "Available Members" and move them to the "Selected Members." If the sharing model for all objects in the Queue is Public Read/Write/Transfer, you do not need to assign users to the queue, as all users already have access to the records for those objects.
Search: Roles
for:
Find
Available Members
Role: CEO
Role: Customer Support, North America
Role: Director, Channel Sales
Role: Director, Direct Sales
Role: Eastern Sales Team
Role: Installation & Repair Services
Role: Marketing Team
Role: SVP, Customer Service & Support
Role: SVP, Human Resources
Role: SVP, Sales & Marketing
Role: VP, International Sales
Role: VP, Marketing
Role: VP, North American Sales
Role: Western Sales Team
Add
Remove
Selected Members
User: Anil Reddy
Role: CFO
Role: COO
Role: Channel Sales Team
Role: Customer Support, International
Save
Cancel

Approval Processes:

An approval process is an automated process that organization can use to approve records in Salesforce. An approval process specifies the steps necessary for a record to be approved and who must approve it at each approval step.

A step can apply to all records included in the process, or just records that have certain attributes.

An approval process also specifies the actions to take when a record is approved, rejected, recalled, or first submitted for approval.

The Approval Process determines the delegated approver, if necessary. And it also Determines if users can edit records that are awaiting approval.

The Approval Process decide if records should be auto-approved or rejected.

Note: Workflow Rules and Approval Processes can be used together.

Comparison of Workflow Rules and Approval Process:

Workflow Rules	Approval Processes
1. Are triggered upon Save	1. Are triggered only when a user clicks “Submit for Approval” button
2. Consist of one set of criteria and actions	2. Consist of multiple steps
	Have an entry criteria, step criteria and step actions
	Have Initial submission actions, rejection and approval actions and actions for each step
3. Can be modified or deleted	3. Some attributes can’t be modified , processes must be deactivated before they can be deleted

Approval Process Terminology

Approval Actions: An approval action is an action that occurs as a result of an approval process. There are four types of approval actions:

Task: Assigns a task to a user we specify. we can specify the Subject, Status, Priority, and Due Date of the task.

Email Alert: Uses an email template we specify to send an email to a designated recipient.

Field Update: Changes the value of a selected field. we can specify a value or create a formula for the new value.

Outbound Message: Sends a message to an endpoint we designate. we can also specify a username and the data we want to include in the message.

Approval Request: An approval request is an email notifying the recipient that a record was submitted for approval and that his or her approval is requested.

Approval Steps: Approval steps assign approval requests to various users and define the chain of approval for a particular approval process.
Each approval step specifies the user who can approve requests for those records, and whether to allow the delegate of the approver to approve the requests.
Subsequent steps in the process also allow us to specify what happens if an approver rejects the request.

Assigned Approver: The assigned approver is the user responsible for approving an approval request.

Delegated Approver: A delegated approver is a user appointed by an assigned approver as an alternate for approval requests. Delegated approvers can't reassign approval requests; they can only approve or reject approval requests.

Initial Submission Actions: Initial submission actions are the actions that occur when a user first submits a record for approval. By default, an action to lock the record runs automatically on initial submission. Initial submission actions can include any approval actions such as email alerts, field updates, tasks, or outbound messages. For example, an initial submission action can update a custom approval status field to “In Progress.”

Final Approval Actions: Final approval actions are the actions that occur when all required approvals have been given for a record. Final approval actions can include email alerts, field updates, tasks, or outbound messages. For example, a final approval action can change the status to “Approved” and send an email notification.

Final Rejection Actions: Final rejection actions are the actions that occur when an approver rejects the request and it goes to the final rejection state. Final rejection actions can include email alerts, field updates, tasks, or outbound messages. For example, a final rejection action can change the status to “Rejected,” send an email notification, and unlock the record so that users can edit it before resubmitting.

Recall Actions: Recall actions are the actions that occur when a submitted approval request is recalled. By default, an action to unlock the record runs automatically on recall. Recall actions can include email alerts, field updates, tasks, or outbound messages. For example, a recall action can change the status of a request from “In Progress” to “Not Submitted.”

Record Locking: Record locking is the process of preventing users from editing a record, regardless of field-level security or sharing settings. Salesforce automatically locks records that are pending approval. Users must have the “Modify All” object-level permission for the given object, or the “Modify All Data” permission, to edit locked records.

The Initial Submission Actions, Final Approval Actions, Final Rejection Actions, and Recall Actions related lists contain Record Lock actions by default. we cannot edit this default action for initial submission and recall actions.

Configuring approval processes:

To create an approval processes, follow the steps below:

Go to the following path

Your Name

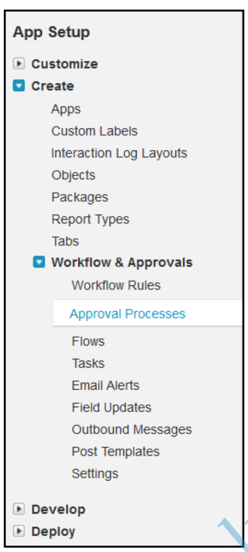
→ Setup

→ App Setup

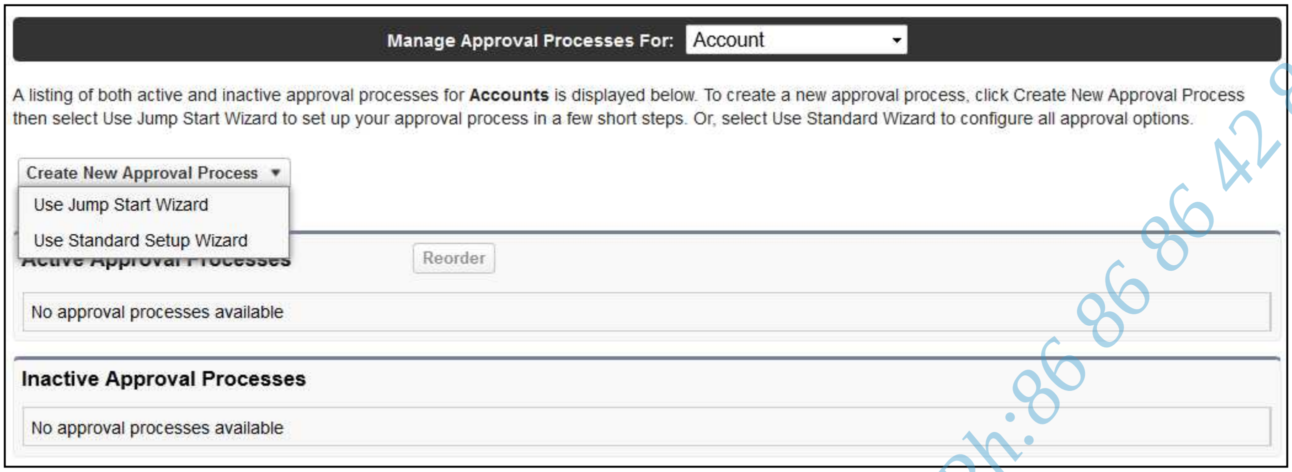
→ Create

→ Workflow & Approvals

→ Click on "Approval Process"



Select the Object type from the "Manage Approval Process For:" option. And to create a new approval process, click "Create New Approval Process" then select **Use Jump Start Wizard** to set up approval process in a few short steps. Or, select **Use Standard Wizard** to configure all approval options.



Jump Start Wizard

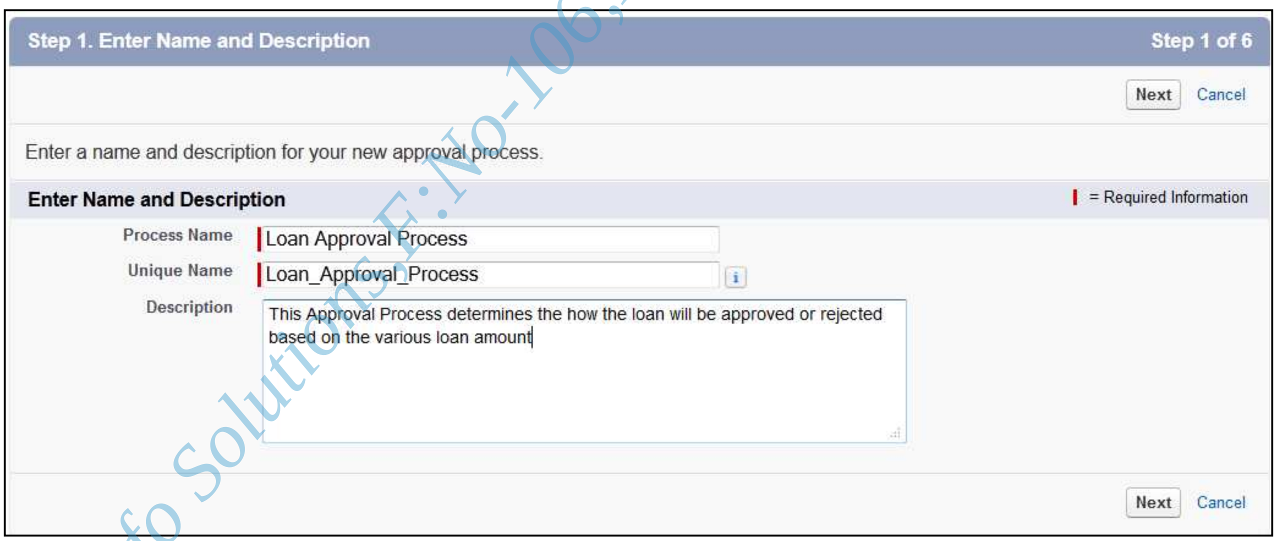
The Jump Start Wizard is provided as a quick way to create simple approval processes that have a single step. To simplify the settings, the Salesforce CRM application automatically determines some default options for us with this option.

Standard Setup Wizard

The Standard Setup Wizard enables the creation of complex approval processes. This option provides the mechanisms to define process and then use a setup wizard to define each step within that process.

Click on the Standard Setup Wizard

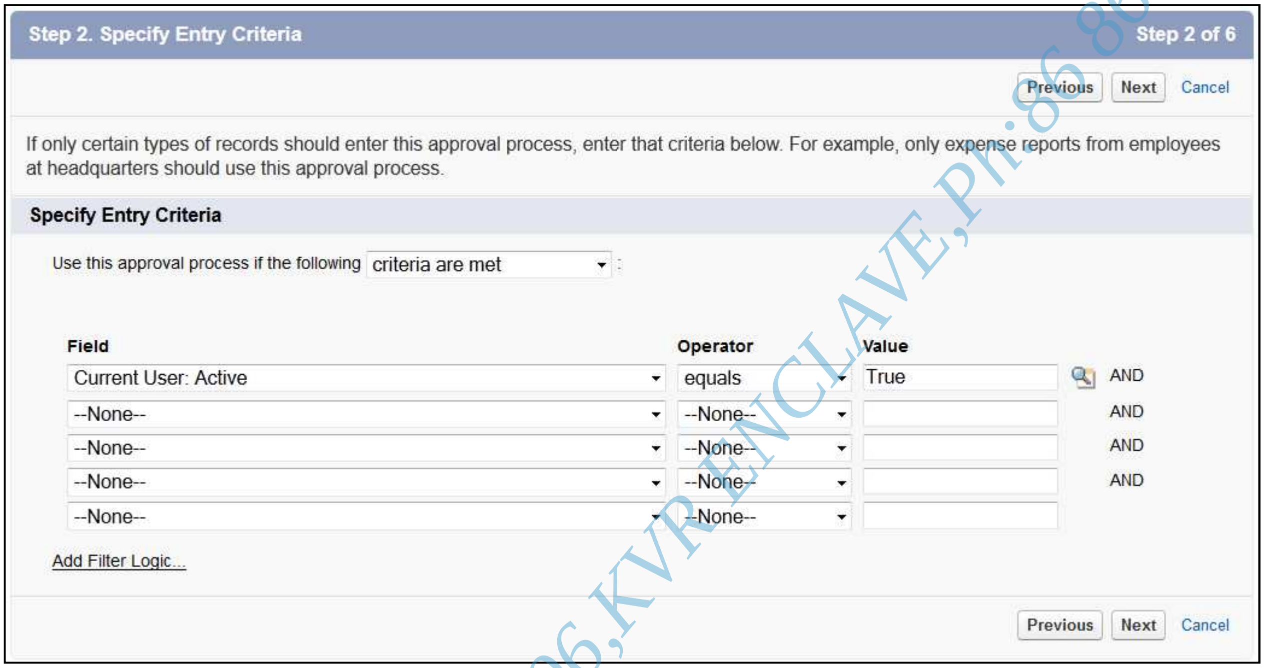
Step 1: Enter Process Name, Unique Name and Description. And click on "Next" button.



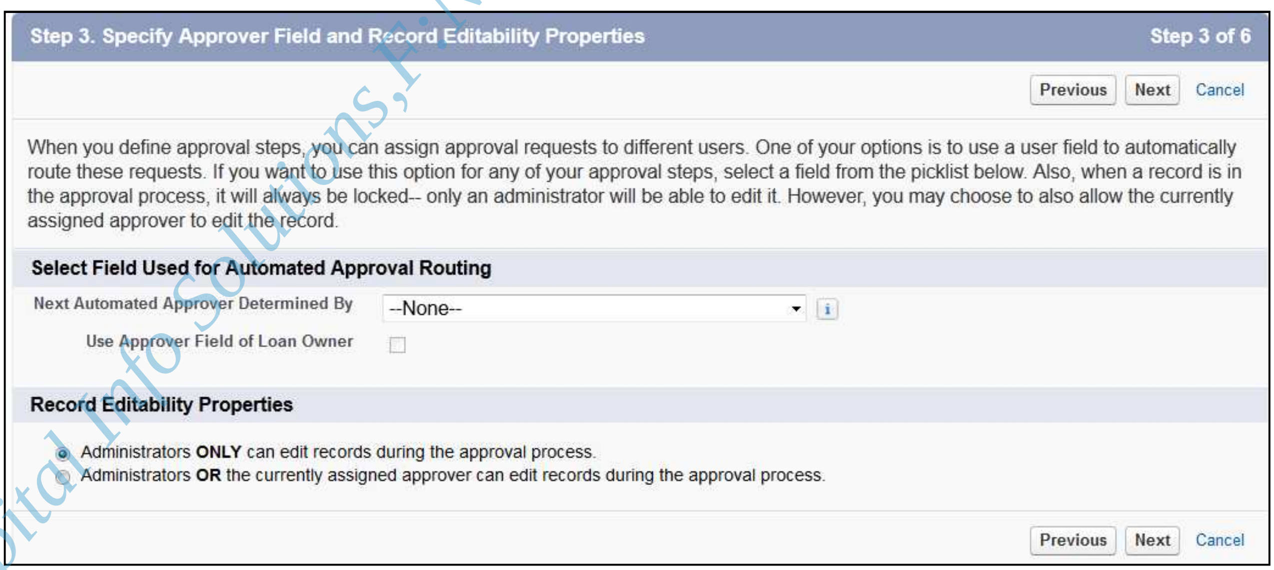
Step 2: Specify Entry Criteria

To specify entry criteria, which is an optional step in the Step 2. Specify Entry Criteria page and is used to determine the records that enter the approval process. Here, we can choose from either the formula logic or we can select certain fields, operators and values to specify when the desired criteria are met.

Click on "Next" button



Step 3: Specify Approver Field and Record Editability Properties



In the above step, using the Next Automated Approver Determined By picklist, select a user field if we want the Salesforce CRM application to automatically assign approval requests to an approver based on the value in the user field. For example, we may want to automatically send approval requests to a user's manager as specified in the user's Manager field.

To allow users to manually choose another user that will approve any approval requests, leave the field Next Automated Approver Determined By blank.

By selecting the **Use Approver Field of Record Owner** checkbox we can set the approval process to use the standard Manager field or a custom field on the record owner's user record instead of the submitting user's record.

Select the appropriate **Record Editability** Properties and click on **Next.**

Administrators **ONLY** can edit records during the approval process ----> Select this option if we want only users with the “Modify All” object-level permission for the given object, or the “Modify All Data” permission, to be able to edit records that are pending approval.
Administrators **OR** the currently assigned approver can edit records during the approval process-->Select this if we want the assigned approver to be able to edit the records too. The assigned approver must also have edit access to the record through both their permissions and the organization-wide sharing defaults for the given object. When a record is submitted for approval, it is automatically locked to prevent other users from editing it during the approval process.

Step 4: Select Notification Templates

We can choose a custom e-mail template to be used when notifying an approver that an approval request has been assigned to them. Alternatively, by leaving this field blank, a simple default e-mail template is used.

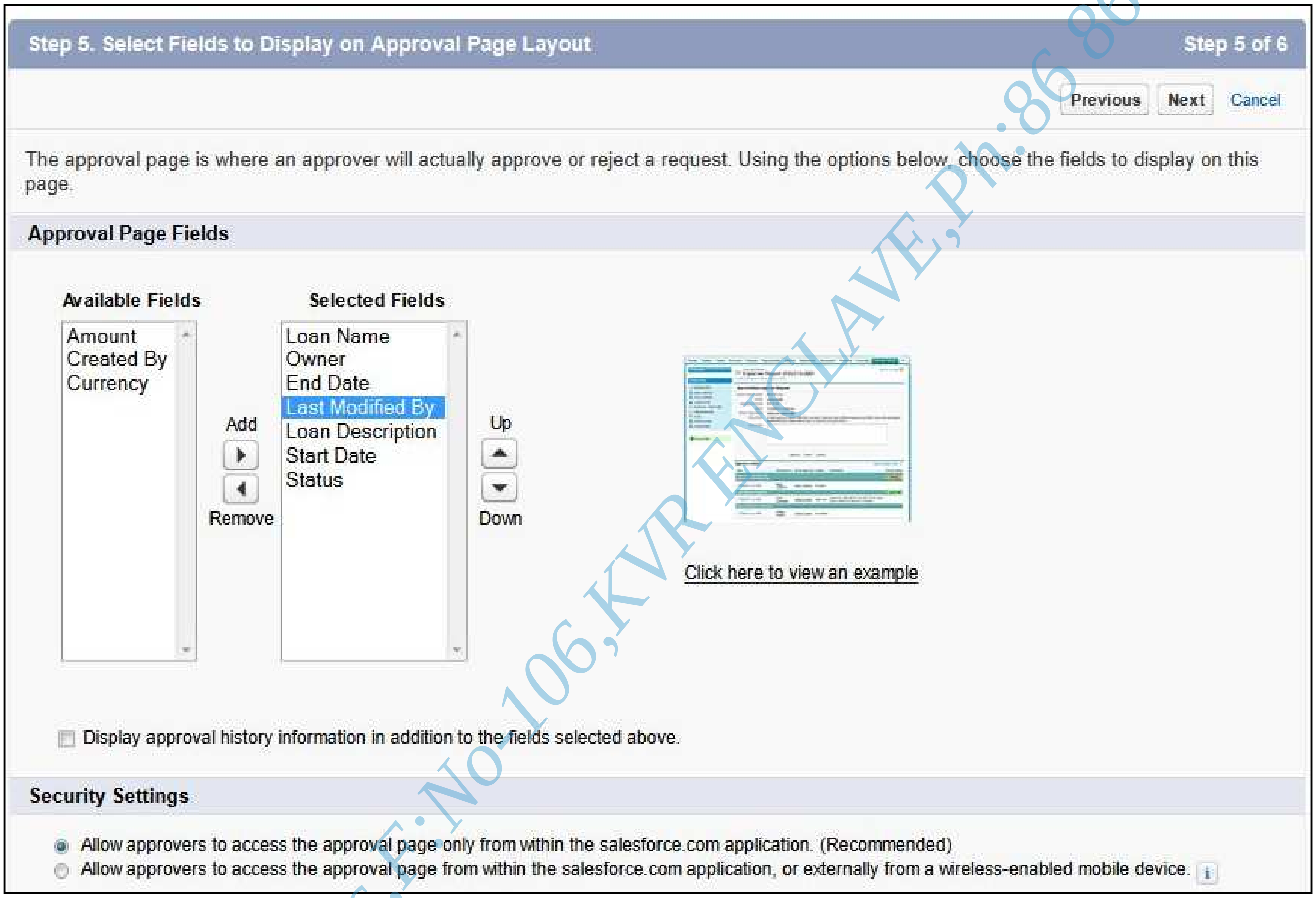
Step 5: Select Fields to Display on Approval Page Layout

The approval page is where an approver approves or rejects a request and it is on Step 5. Select Fields to Display on Approval Page Layout of configuring the approval process where we can carry out the following:

1. Select and sort the fields we want to display on the approval request page.

2. Select Display approval history information in addition to the field selected above to include the Approval History related list which displays the columns Date; Status; Assigned To, Actual Approver, Comments, and Overall Status.

3. To specify how approvers can access an approval page, select either **Allow approvers to access the approval page only from within the application (Recommended)** or **select Allow approvers to access the approval page from within the salesforce.com application, or externally from a wirelessenabled mobile device**, and then click on Next.



Step 6: Specify Initial Submitters

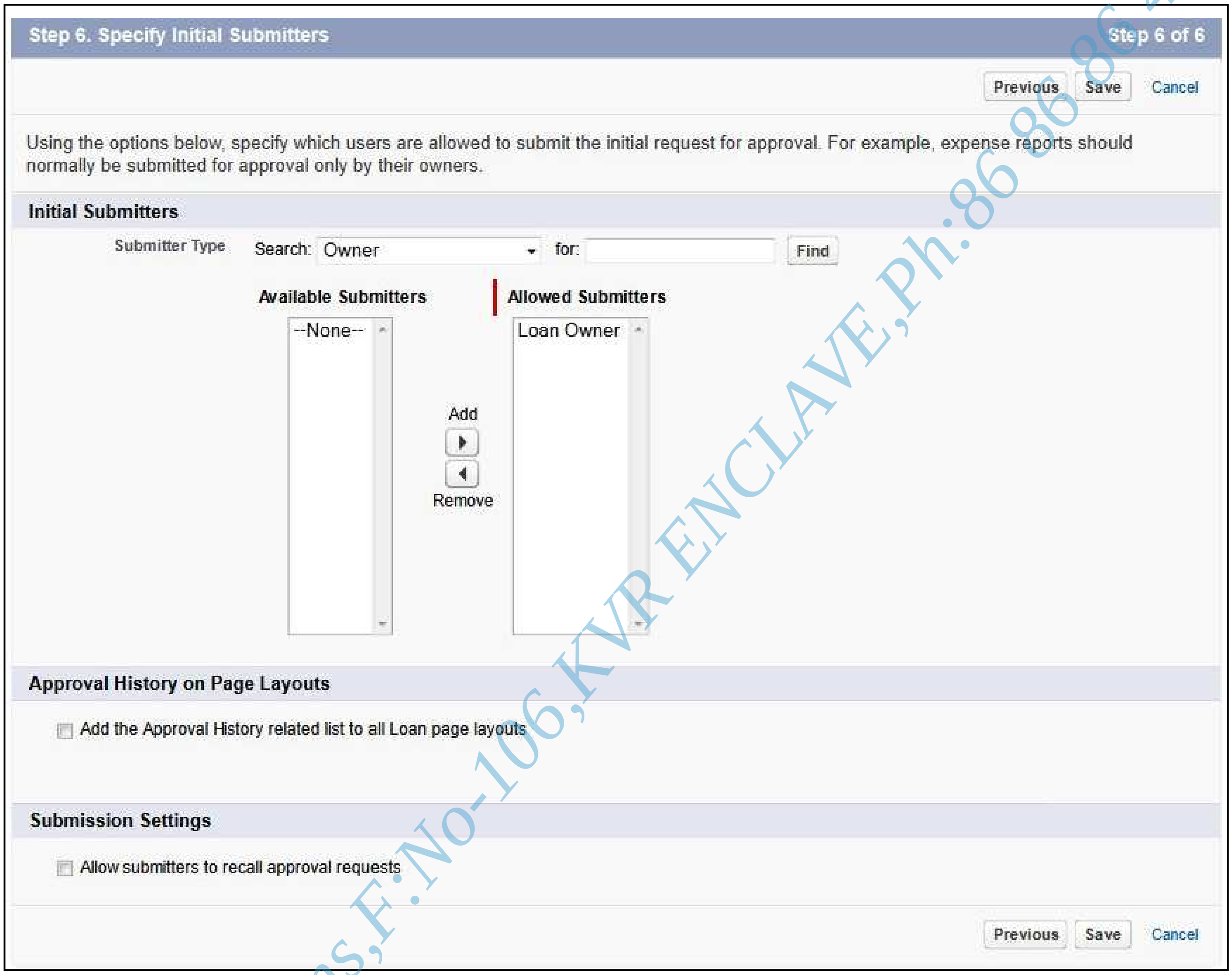
Specify **Initial Submitters** as shown in the following screenshot. i.e Specify which users are allowed to submit records for approval.

Optionally, select **Add the Approval History related list to all [object name] page layouts**. This will automatically update all the page layouts for this object and include a related list that allows users to view and submit approval requests.

Optionally, select **Allow submitters to recall approval requests** to give submitters the option to withdraw their approval requests

Note: When the **Allow submitters to recall approval requests** option is selected the Recall Approval Request button in the Approval History related list is visible for the users that have submitted the record as well as system administrator. When a user clicks on Recall Approval Request, the pending approval request for the record is withdrawn and recall actions are run.

Now Click on "Save" button



Note: We unable to activate the process until we have created at least one approval step for the approval process.

Creating Approval Steps:

Approval steps in Salesforce CRM set the flow of the record approval process that associates the participating users at each chain of approval. For each approval step, we set Who - can approve requests for the records; What - must the record contain to meet the criteria, and Why should the record be allowed to be approved (in the case of a delegated approver).

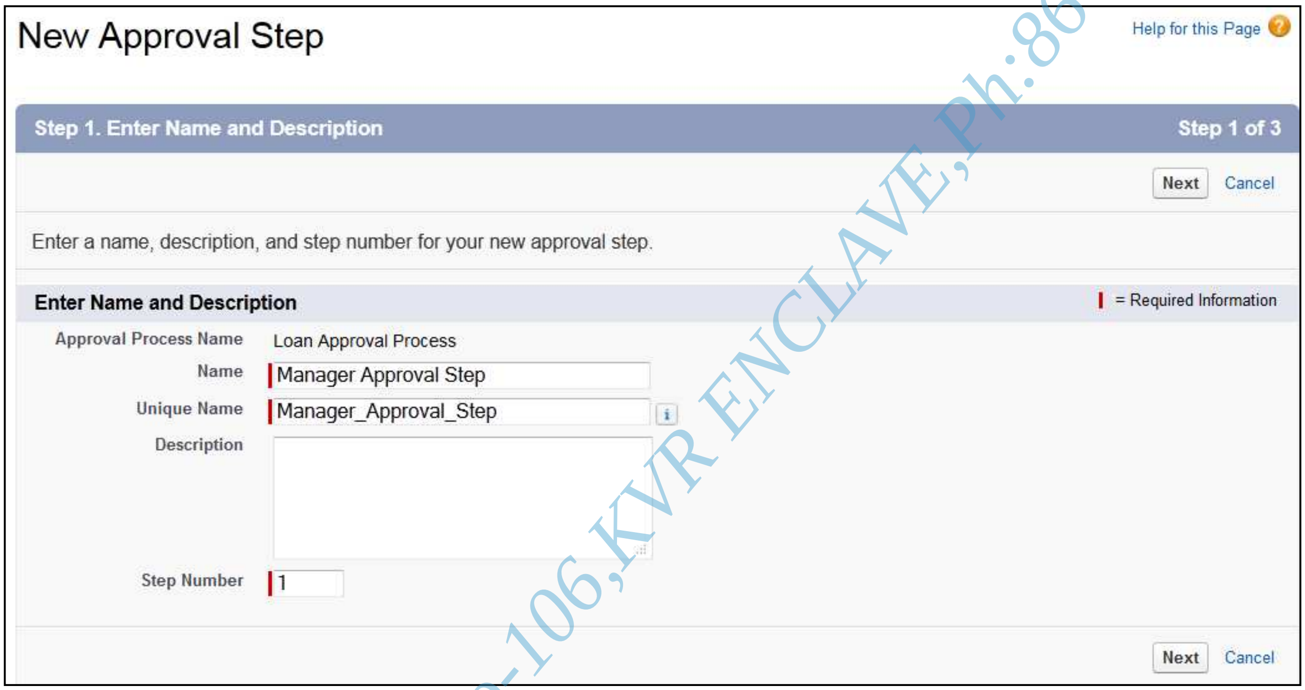
To create an approval step, follow the path

Your Name --> Setup --> App Setup --> Create --> Workflow & Approvals --> Approval Processes --> select the name of the approval process, and then carry out the following:

Click on the New Approval Step button from the Approval Steps related list section

Step 1: Enter the Name, a Unique Name, and an optional Description for the approval step

Enter a **step number** that positions the step in relation to any other step in the approval process as shown next and click on **Next** button



Step 2: Specify Step Criteria

If we specified filter criteria or entered a formula, choose what should happen to records that do not meet the criteria or if the formula returns "False" where the options are:

- **approve record** to automatically approve the request and perform all final approval actions.
- **reject record** to automatically reject the request and perform all final rejection actions.

This option is only available for the first step in the approval process.

Click on "Next" button

Step 3: Select Assigned Approver

In this page Select Assigned Approver where we specify the user who should approve records that enter this step and optionally choose whether the approver's delegate is also allowed to approve these requests.

Select Approver Options are:

• **Let the submitter choose the approver manually** which prompts the user to manually select the next approver

• **Automatically assign to a queue** Assigns the approval request to a particular queue. Queues are only available on specific objects (or)

Automatically assign using the user field selected earlier Assigns the approval request to the user in the custom field that is displayed next to this option. This custom field was selected during the configuration of the approval process.

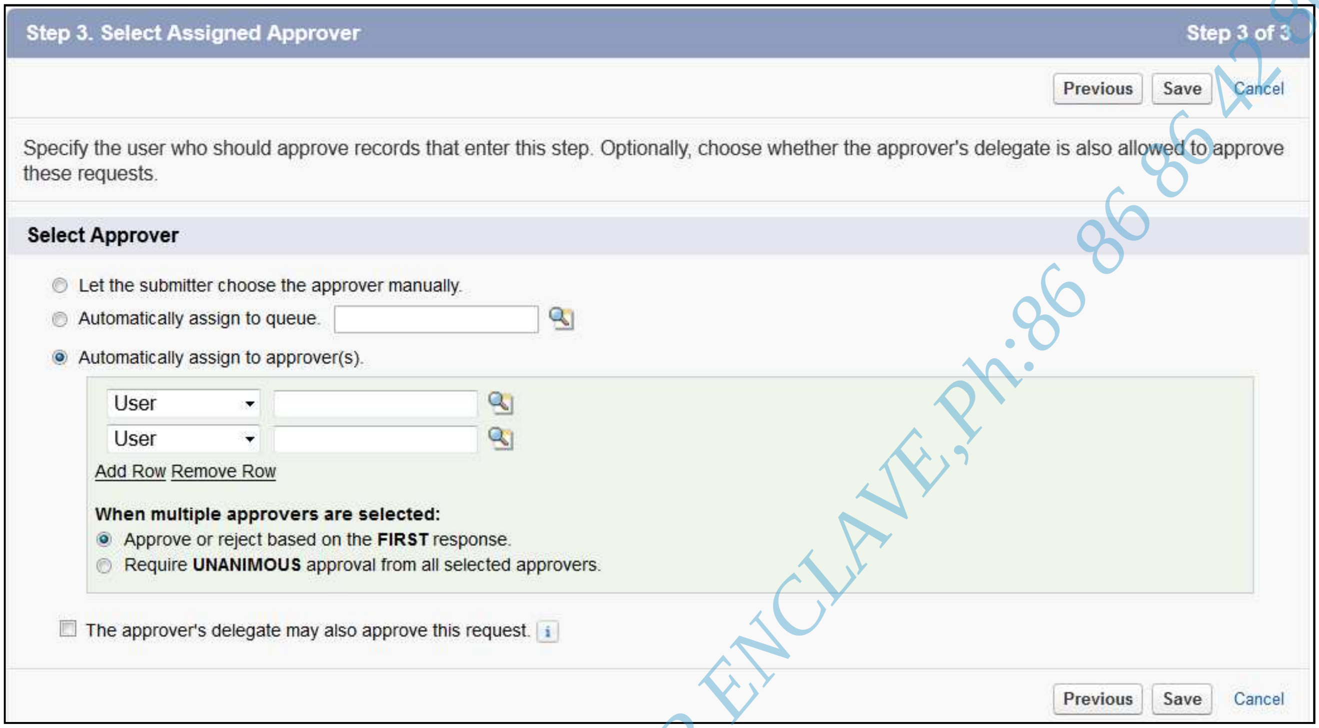
• **Automatically assign to approver(s)** which allows us to assign the approval request to one or more users or related users as shown.

Use **Add Row** and **Remove Row** to change the number of approvers. There is a limit of 25 approvers per step.

If we specify multiple approvers in the Automatically assign to approver(s) option, choose one of the following:
Approve or reject based on the FIRST response ---> The first response to the approval request determines whether the record is approved or rejected.
Require UNANIMOUS approval from all 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.

Optionally, select **The approver's delegate may also approve this request**. A delegate is the user listed in the Delegated Approver field on the assigned approver's user detail page. Delegated approvers can't reassign approval requests; they can only approve or reject approval requests.

Click on the "Save" button.



If this is not the first step in the approval process, we must specify what will happen if the approver rejects a request in this step, as shown in the following example,
where the options are:

- **Perform all rejection actions for this step AND all final rejection actions. (Final Rejection)**

Automatically rejects the request completely regardless of any previous steps that were approved. Salesforce performs all rejection actions specified for this step and all final rejection actions.

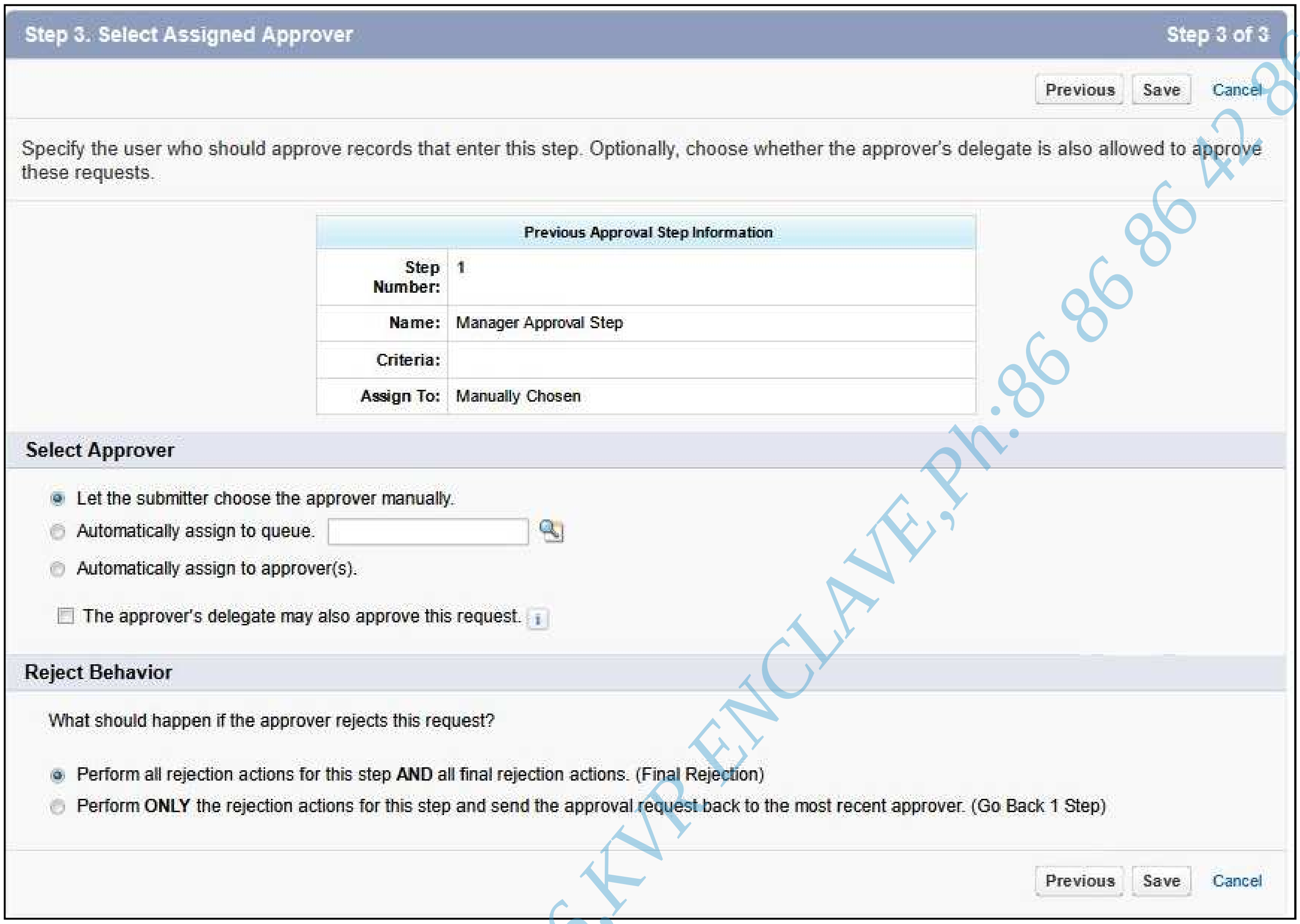
- **Perform ONLY the rejection actions for this step and send the approval request back to the most recent approver. (Go Back 1 Step)**

Automatically rejects the request and returns the approval request to the previous approver. Salesforce performs all rejection actions specified for this step.

Now click on Save and specify any workflow actions we want to set within this step using the options:

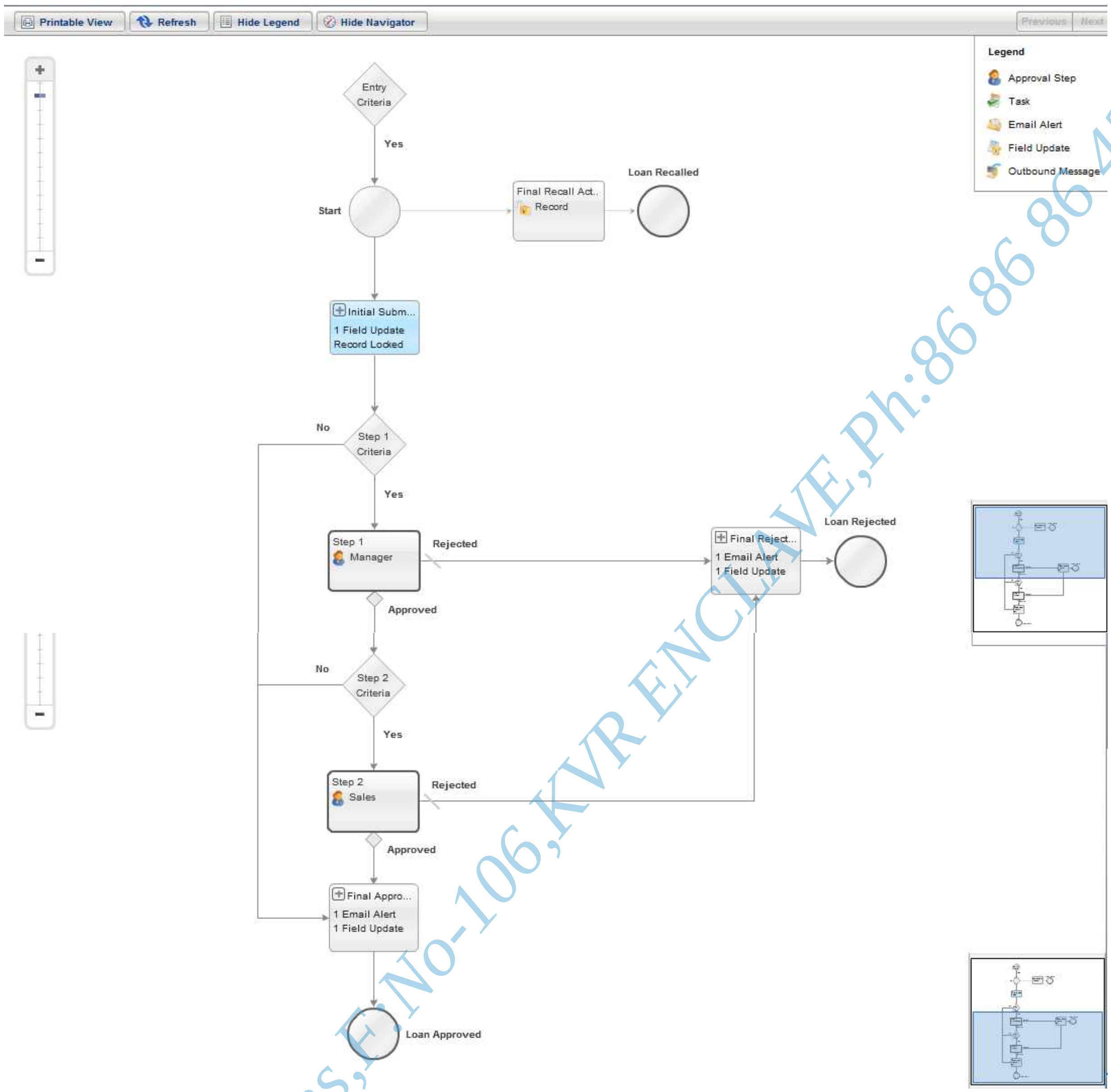
- Yes, I'd like to create a new approval action for this step now.
- Yes, I'd like to create a new rejection action for this step now.
- No, I'll do this later. Take me to the approval process detail page to review what I've just created.

Finally, click on Go! to complete the approval process.



Process Visualizer

The process visualizer provides a read-only representation of saved approval processes. It can be accessed by clicking on the **View Diagram** button from within the saved approval process as shown in the following screenshot:



Having the process set out diagrammatically can help in the understanding of:

- The steps necessary for a record to be approved
- The designated approvers for each step
- The criteria used to trigger the approval process
- The specific actions taken when a record is approved, rejected, recalled, or first submitted for approval

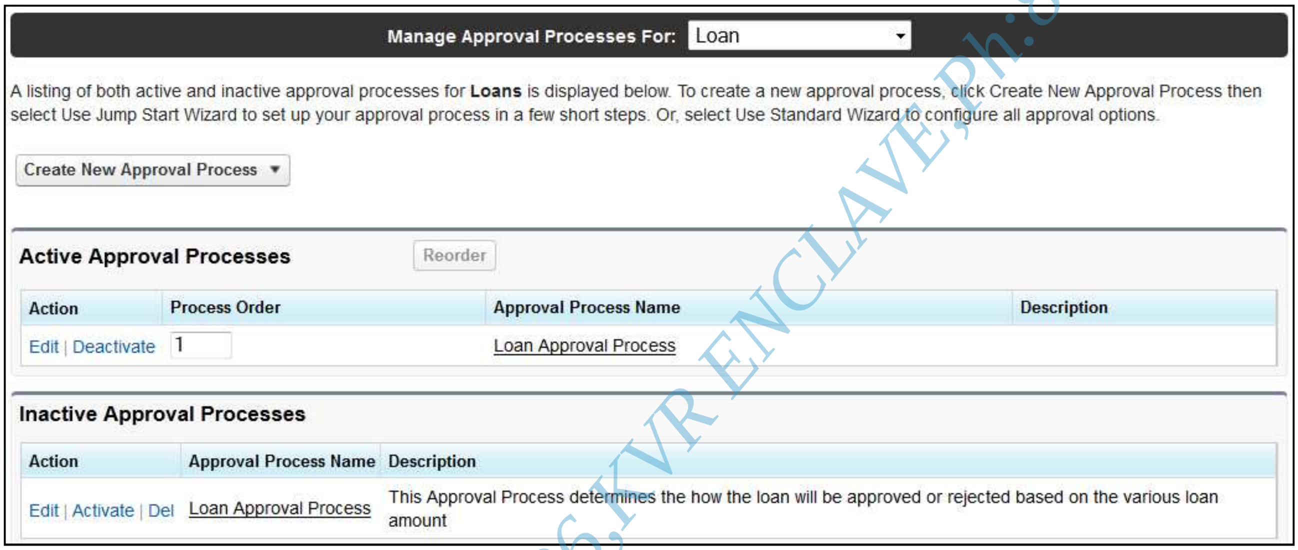
Important Points about the Approval Process

1. Activating the Approval Process:

Go to the following path for activating an Approval Process

Your Name --> Setup --> App Setup --> Create --> Workflow & Approvals --> Click on "Approval Processes" ---> There a list of both active and inactive approval processes is displayed

Go to the Inactive Approval Processes section and click on "Activate" link next to the "Edit" link.



2. Approval processes result in approval history being automatically tracked which is not applied to workfklow rules.

3. When an approval is initiated, the record is "locked down" and cannot be changed by someone other than the approver or system administrator until the record has completed the approval process.

Parallel Approval Process:

Parallel approval processes allow a record to be sent for approval to up to 25 different users simultaneously. i.e The ability to send approval requests to multiple approvers in a single step

When setting up the processes, developers choose the approvers, as well as whether the record requires unanimous approval or whether the record should be approved/rejected based on the first response.

Dynamic Approval Process:

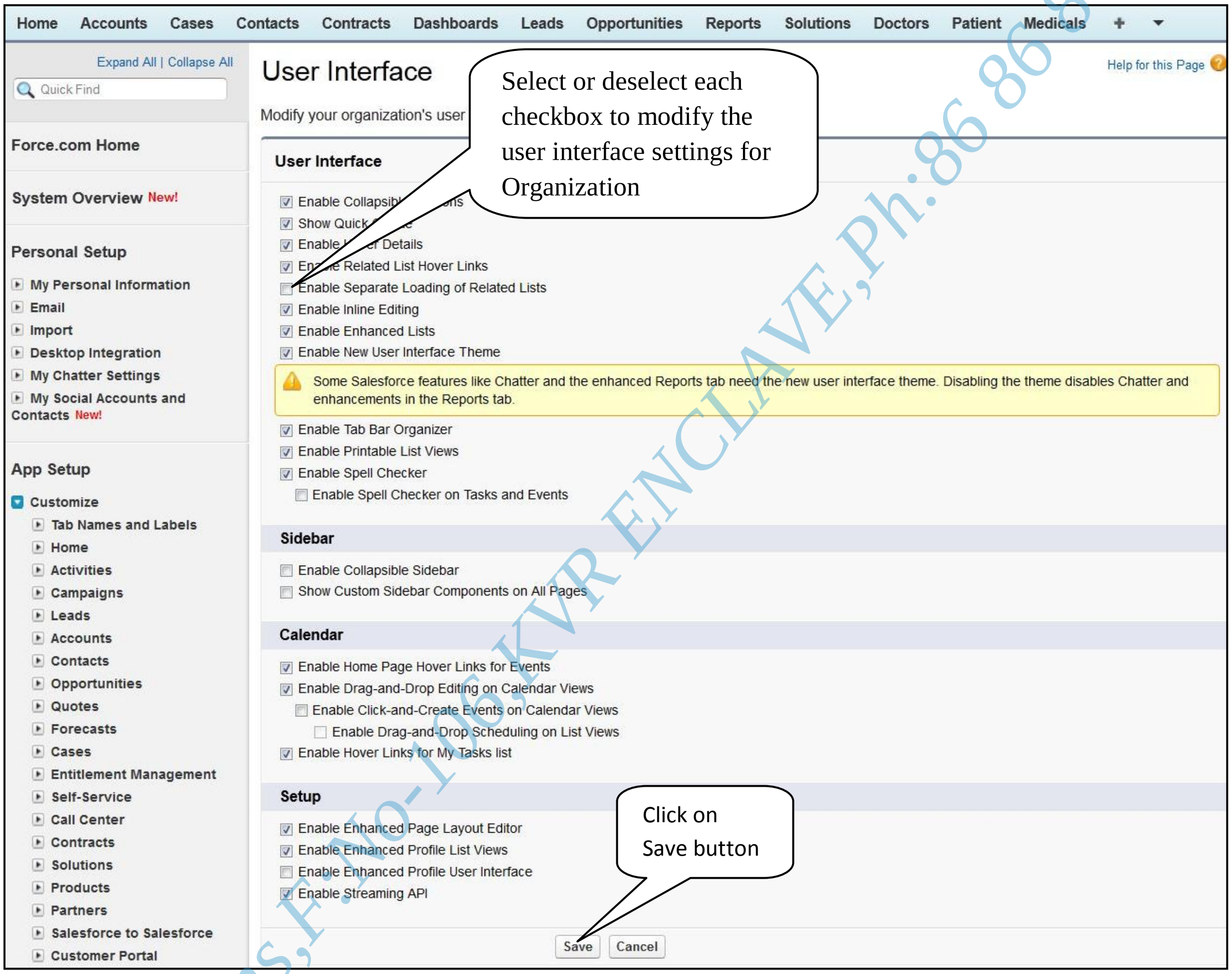
Dynamic approval processes routes approval request to users listed in lookup fields on the record requiring approval.

Dynamic approval routing allow records to be routed based on complex approval matrices.

User Interface Settings:

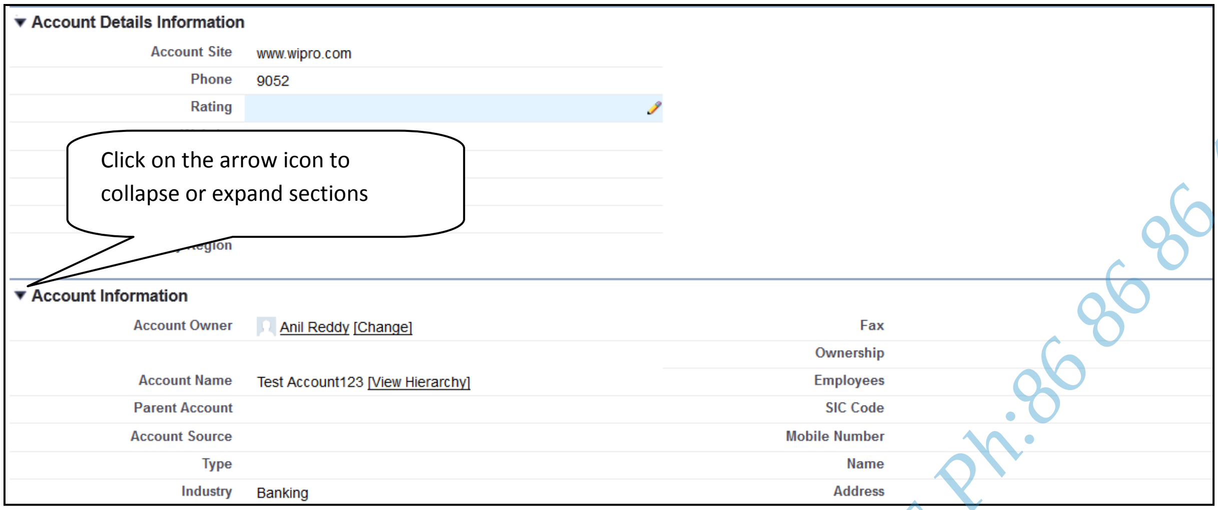
The User Interface settings is used for Modify organization's user interface with the following settings:

1. Click Your Name ---> Setup--->App Setup ---> Customize ---> Click on the User Interface



Enable Collapsible Sections

Collapsible sections enables users to collapse or expand sections on record detail pages using the arrow icon next to the section heading. Sections remain expanded or collapsed until the user changes their settings for that section



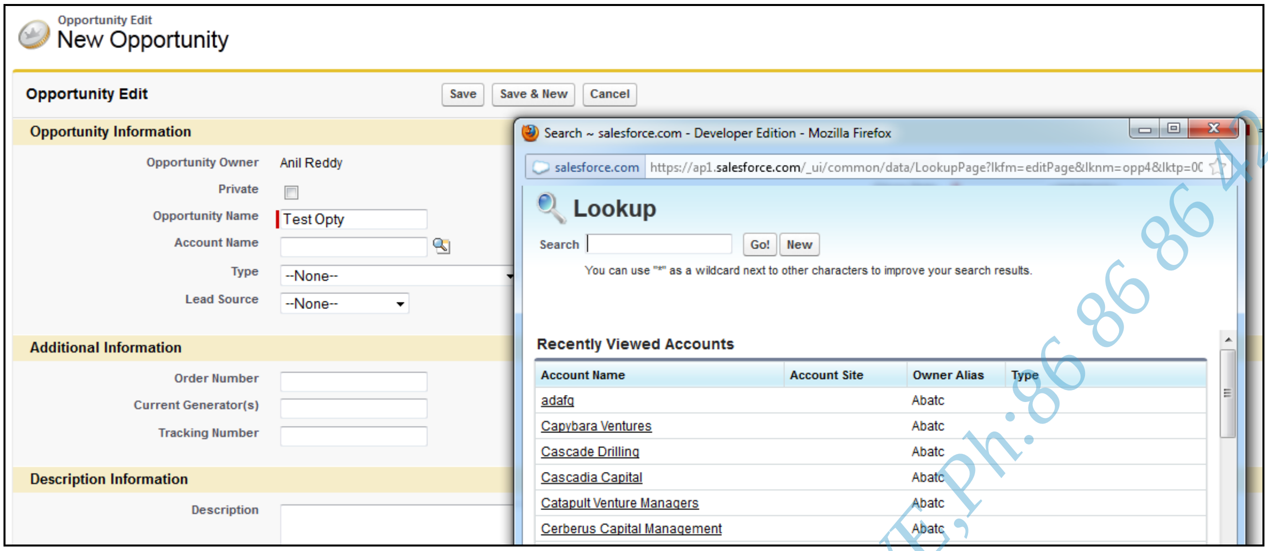
Show Quick Create

The **Show Quick Create** option adds the Quick Create fields section to the sidebar on a Record tab page to enable users to create a new record using minimal data fields:

The Show Quick Create option also controls whether users can create new records from within lookup dialogs.
With the setting enabled, users see a New button in the lookup dialog screen.
The following example shows the creation of new account within the account lookup dialog while working with an opportunity record:

Click on the Opportunity Tab and click on "New" button

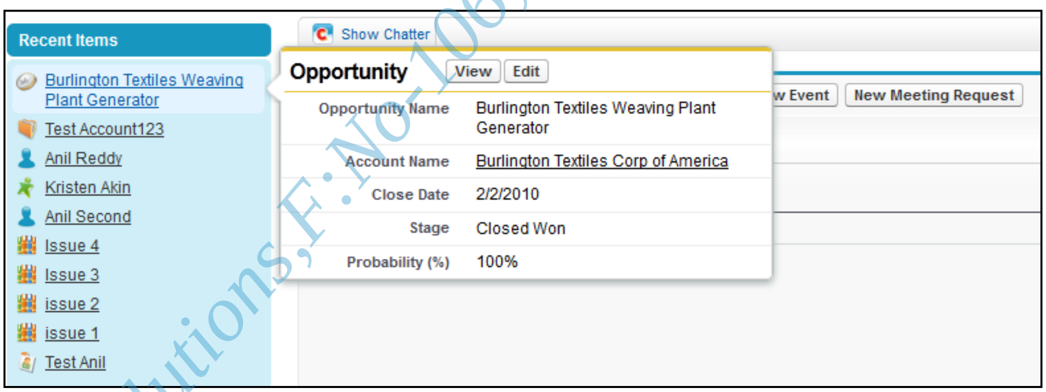
Click lookup dialog next to Account Name field, in the popup window, we can select the existing account and also we can create new account by clicking on "New" button if we select "Show Quick Create" option at the user interface settings



Enable Hover Details

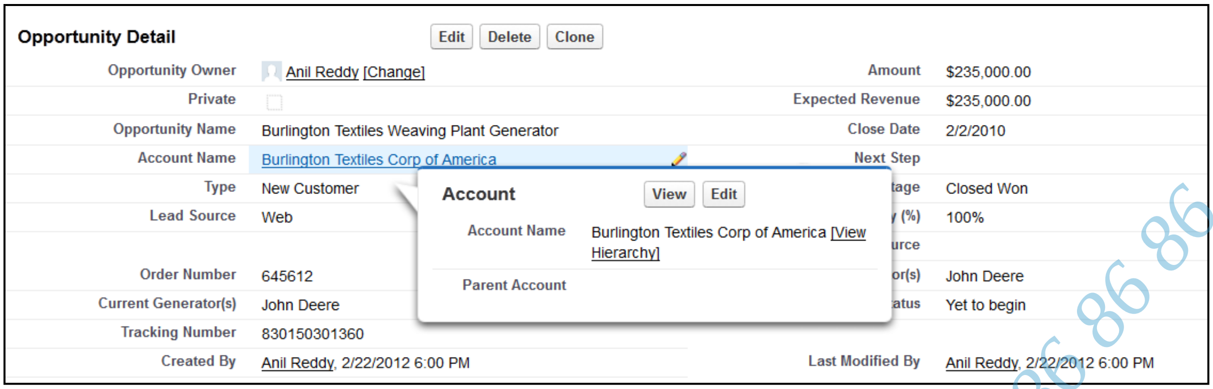
The "Enable Hover Details" option allows users to view interactive information for a record by hovering the mouse pointer over a link to that record in the Recent Items list on the sidebar or in a lookup field on the record detail page. The fields displayed in the hover details are determined by the record's mini page layout which is set at the page layout edit screen.

The following screenshot shows the hovering the mouse pointer over a link to a record in the Recent Items list on the sidebar:



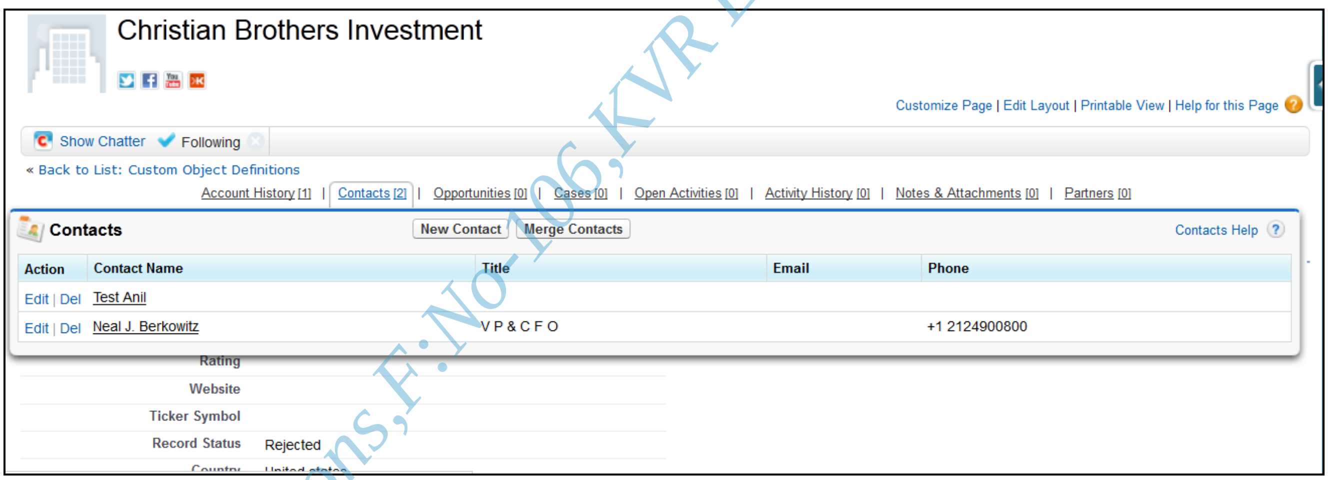
The following screenshot show the hovering the mouse pointer over a lookup field on the record detail page:

We can customize the fields in the small window by going through mini page layout in the Page Layouts



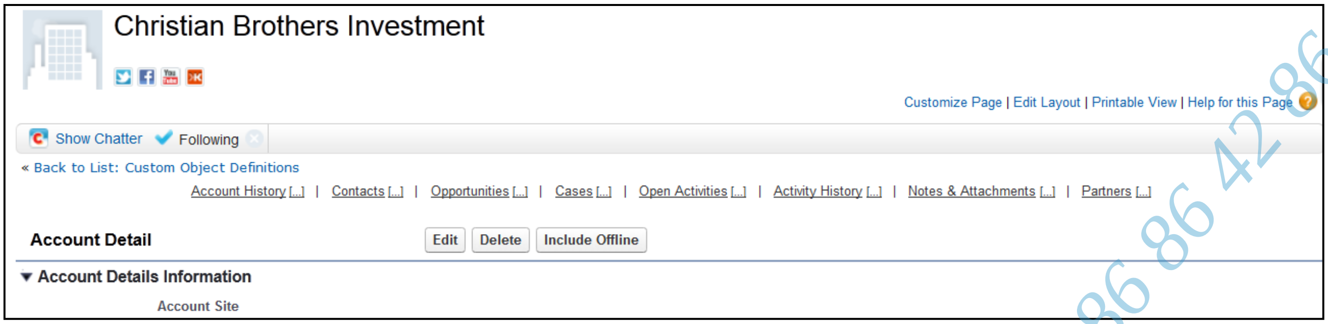
Enable Related List Hover Links

This option enables related list hover links to be displayed at the top of standard and custom object record detail pages.
It allows users to view the related list and its records by hovering the mouse pointer over the related list link.
Users can also click the related list hover link to jump down directly to the Related List section without having to scroll down the page.



Enable Separate Loading of Related Lists

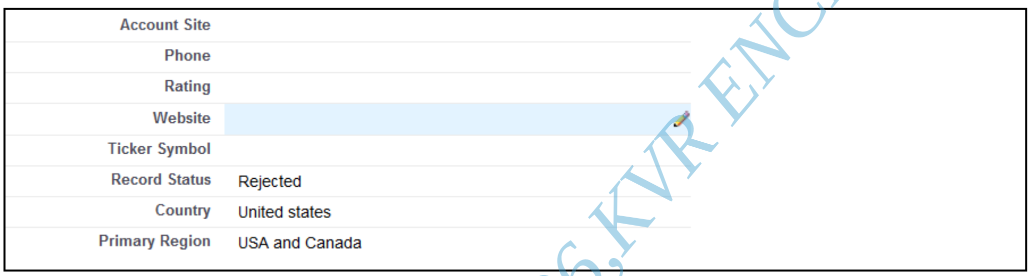
This option enables the separate loading of record detail pages. First, the primary record detail data loads, and then the related list data. This option serves to improve the display performance for organizations with a large number of related lists on record detail pages. When the page is loaded, the record details are displayed immediately and afterwards, the related list data loads during which the users see a progress indicator for the related list.
We can see that the related list sections are not yet loaded. They appear as [···] while the primary record detail (for the account example) is loaded immediately:



Enable Inline Editing

This option allows users to change field values directly within the record detail page avoiding the clicking of "Edit" button. By double-clicking the field to be edited within the detail page, the field changes to become editable. The new value can then be entered and saved or the action can be undone using an undo button.

First, the field is highlighted by hovering over it with the mouse to reveal the pencil icon indicating that the field is editable:



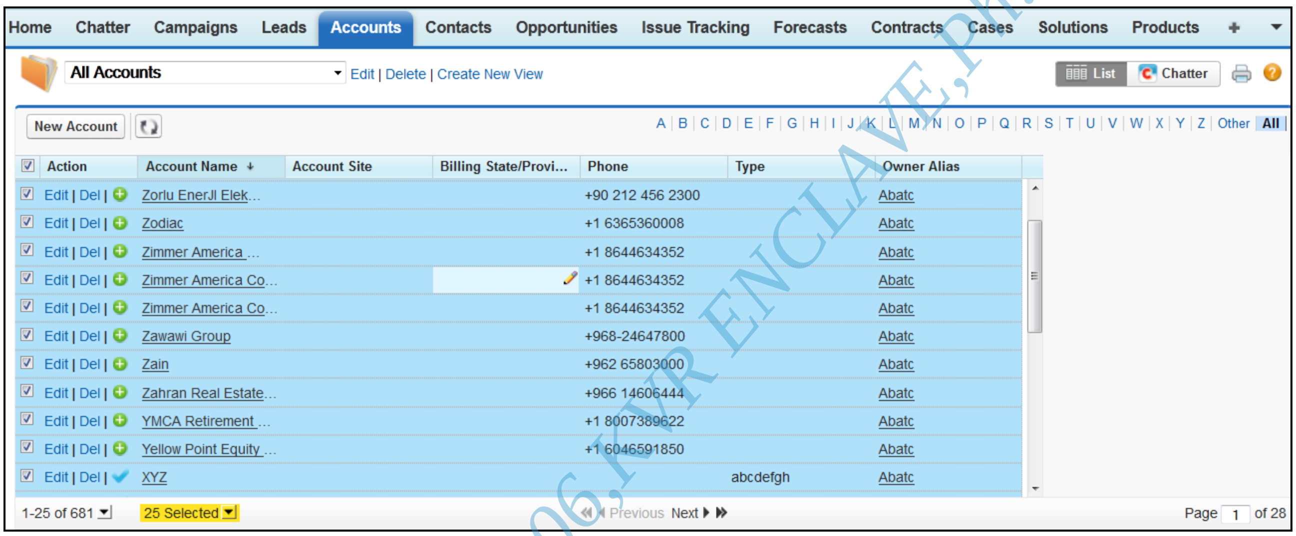
Then double-clicking the field causes the field to switch from a view mode to an edit mode to allow a new value to be entered:

The changed value and the detail page can then be saved in the standard way using the Save button:

Note: Certain fields cannot be changed using inline editing such as System Fields (Created By, Last Modified By, and so on)
Calculated Fields (Formula, Auto Number, Roll-Up Summary, and so on)
Read-Only Fields and Special Fields (such as Owner, Record Type, and so on)

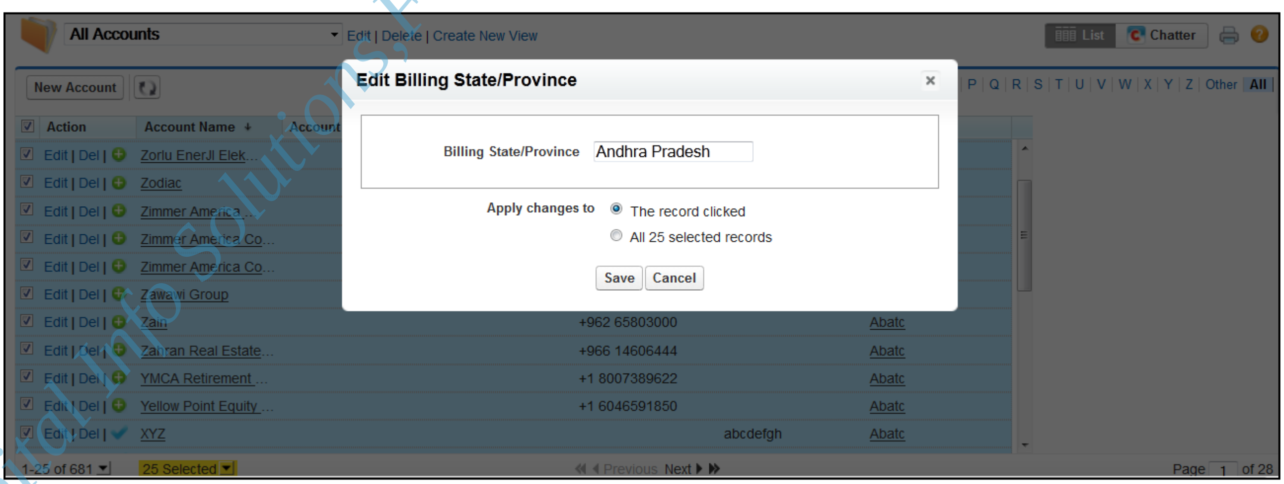
Enable Enhanced Lists

This option provides the user with the ability to view, customize, and edit list data. When enabled along with the Enable Inline Editing setting, users can also edit records directly within the list without having to move away from the page:
Here we can change Billing State/Province for selected accounts using enhanced lists without going to that record.



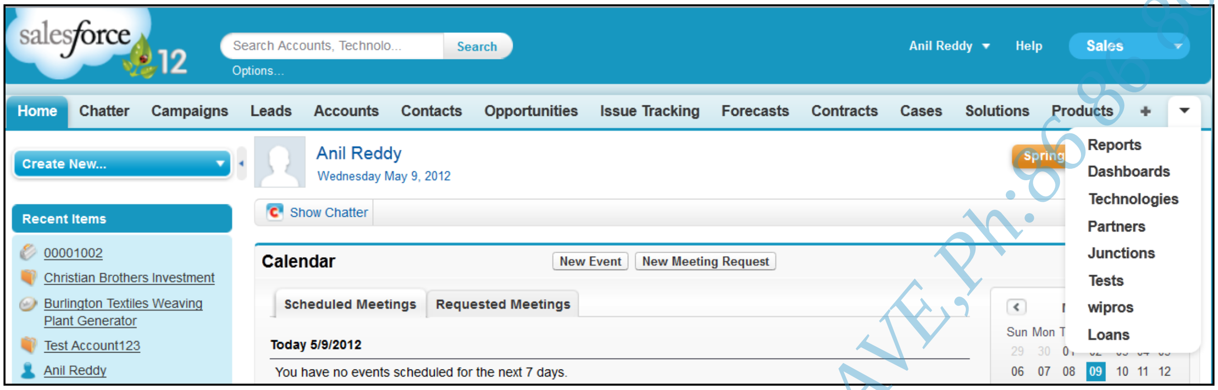
Enter the value in the field and select the appropriate Apply changes to option

Click on Save button



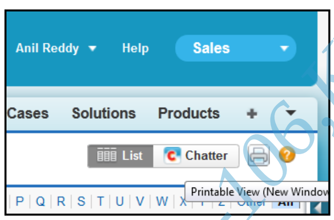
Enable Tab Bar Organizer

The **Tab Bar Organizer** automatically arranges tabs in the main tab bar to prevent horizontal scrolling of the page. It dynamically determines how many tabs can display based on the width of the browser window and puts tabs that extend beyond the browser's viewable area into a drop-down list.

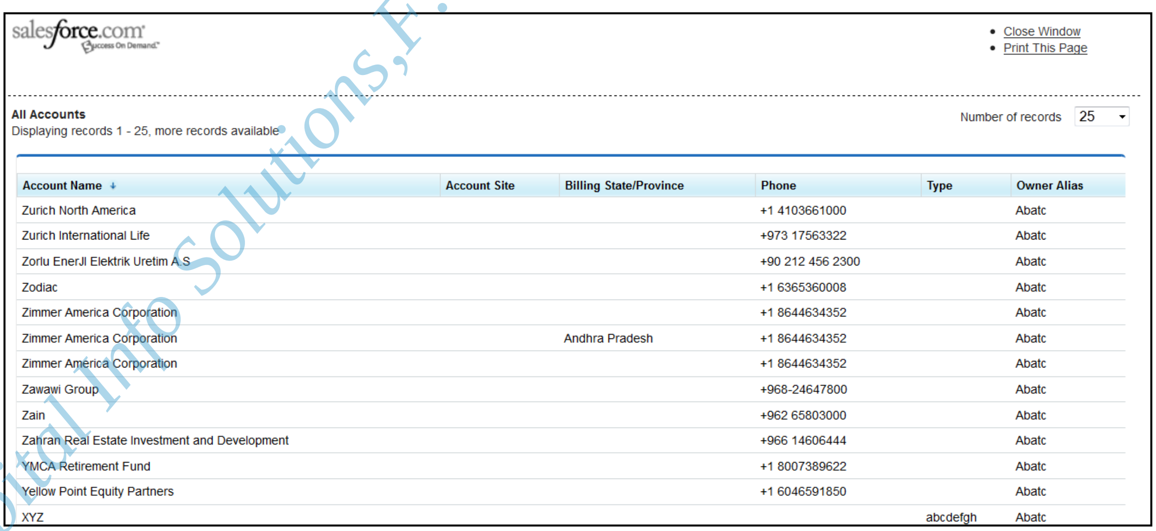


Enable Printable list views

This option allows users to easily print list views. If enabled, users can click the Printable View link (printer logo) located at the top-right corner on any list view to open a new browser window:



Within the new window, the current list view is displayed in a print-ready format:


salesforce.com Success On Demand

- Close Window
- Print This Page

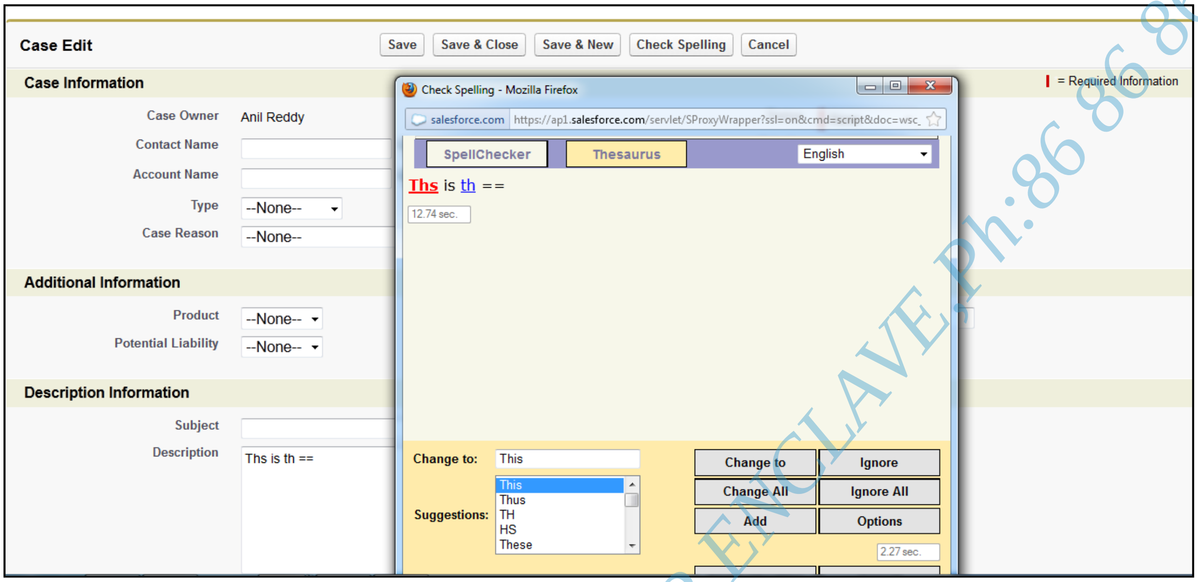
All Accounts
Displaying records 1 - 25, more records available

Number of records 25

Account Name	Account Site	Billing State/Province	Phone	Type	Owner Alias
Zurich North America			+1 4103661000		Abatc
Zurich International Life			+973 17563322		Abatc
Zorlu EnerJl Elektrik Uretim A.S			+90 212 456 2300		Abatc
Zodiac			+1 6365360008		Abatc
Zimmer America Corporation			+1 8644634352		Abatc
Zimmer America Corporation		Andhra Pradesh	+1 8644634352		Abatc
Zimmer America Corporation			+1 8644634352		Abatc
Zawawi Group			+968-24647800		Abatc
Zain			+962 65803000		Abatc
Zahran Real Estate Investment and Development			+966 14606444		Abatc
YMCA Retirement Fund			+1 8007389622		Abatc
Yellow Point Equity Partners			+1 6046591850		Abatc
XYZ				abcdefgh	Abatc

Enable Spell Checker

When this option is selected the Check Spelling button appears in certain areas of the application where text is entered, such as sending an e-mail, or when creating cases, notes, and solutions. Clicking on this button checks the spelling of your text:



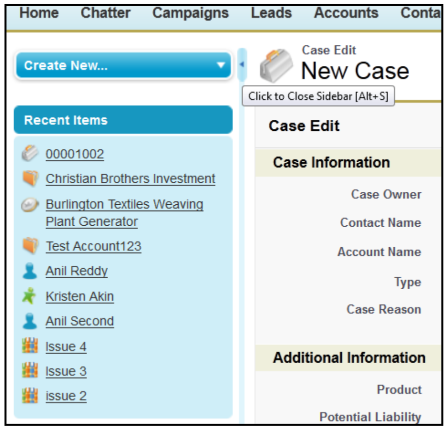
Enable Spell Checker on tasks and events

This option enables the appearance of the Check Spelling button when users create or edit tasks or events. Spelling is checked on the Description field on events and the Comments field on tasks.

Sidebar Settings:

Enable Collapsible Sidebar:

The collapsible sidebar gives users the ability to show or hide the sidebar on every Salesforce page where the sidebar is included. When this option is selected, the collapsible sidebar becomes available to all users in your organization. However, each user can set their own preference for displaying the sidebar. Users can set the sidebar to be permanently displayed or they can collapse the sidebar and show it only when needed.



Show Custom Sidebar Components on All Pages

If we have custom home page layouts that include components in the sidebar, this option displays the sidebar components on all pages in Salesforce and for all users. If only certain profiles are to view sidebar components on all pages, we can assign a Show Custom Sidebar On All Pages permission to just those profiles.

Enable Home Page Hover Links for Events

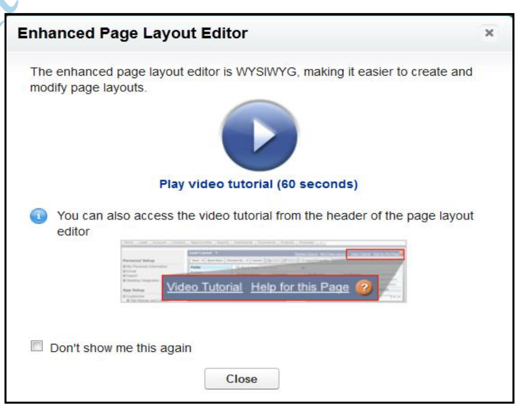
This option enables hover links in the calendar section of the Home tab and allows users to hover the mouse over the subject of an event to see interactive information for that event.

Enable Hover Links for My Tasks List

This option enables hover links for tasks in the My Tasks section of the Home tab and on the calendar day view and allows users to hover the mouse over details of the task in an interactive section.

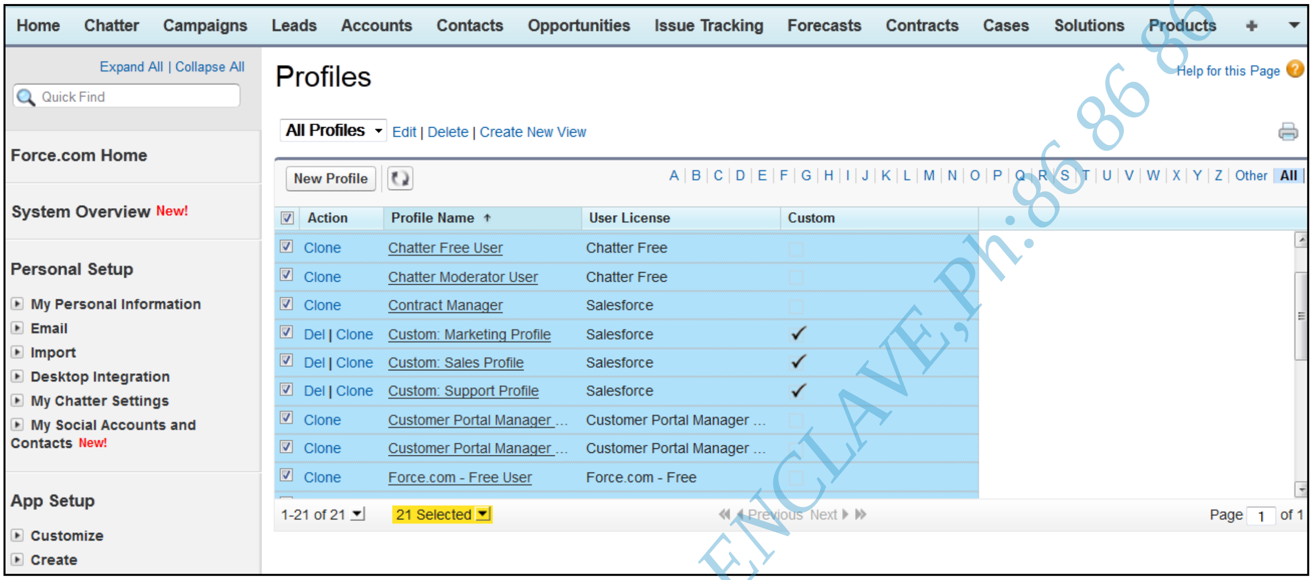
Enable Enhanced Page Layout Editor

This option enables the enhanced page layout editor for your organization for editing page layouts with a feature-rich WYSIWYG (What-You-See-Is-What-You- Get) editor. When we edit any page layout, The following window will populate



Enable Enhanced Profile List Views

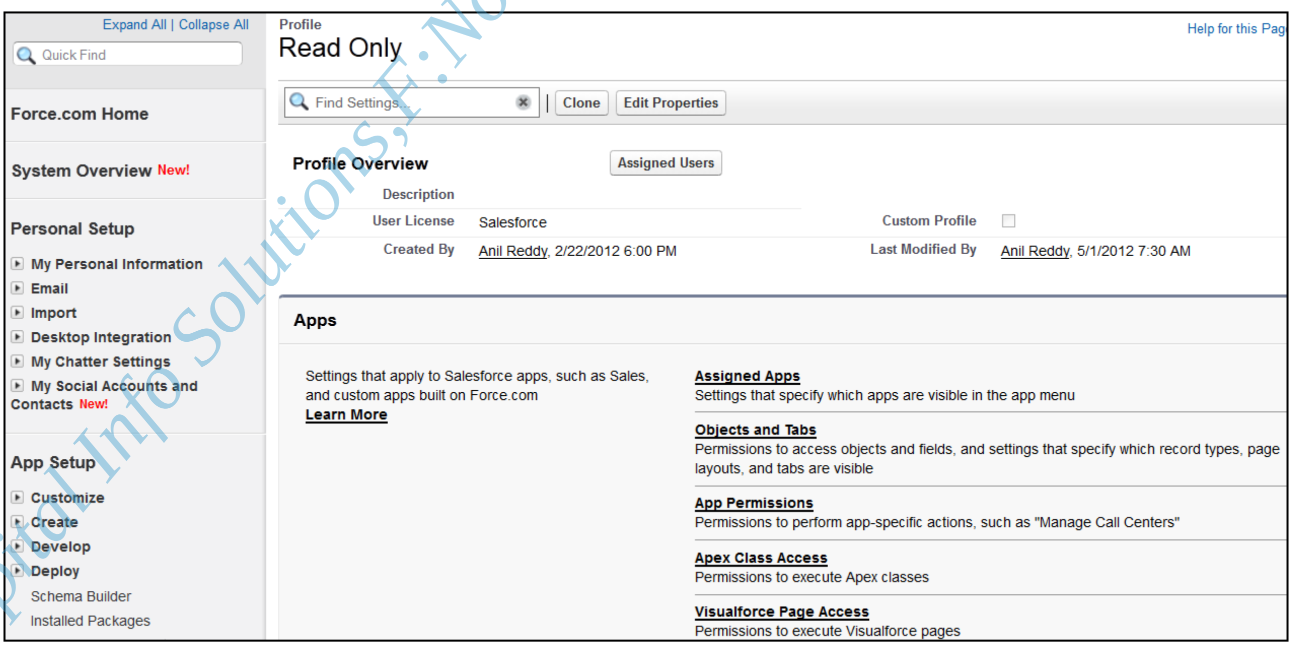
This option enables the enhanced list views and inline editing on the profiles list page which allows us to manage multiple profiles at once.



Enable Enhanced Profile User Interface

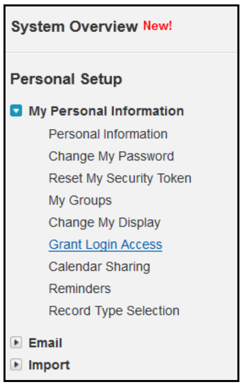
Select this checkbox to activate the enhanced profile user interface, which allows us to easily navigate, search, and modify settings for a single profile.

Go to the profiles, and click on any existing profile name

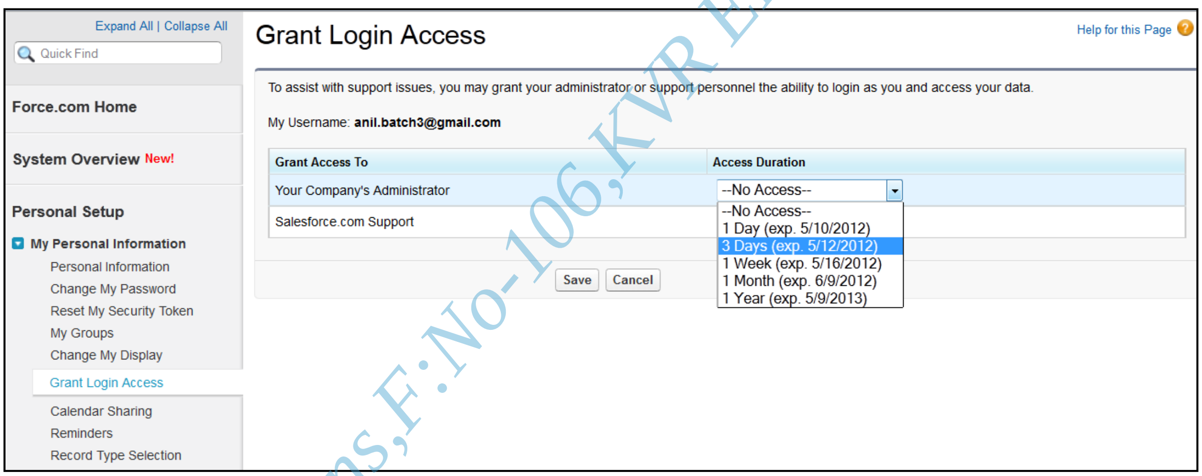


Grant Login Access:

We may grant access to users , so that they have ability to login as you and access your data. We can also access the other users data if they give grant login access to administrators.
Path for Grant Login Access is
Your Name---> Setup--->Personal Setup---> Click on "Grant Login Access"



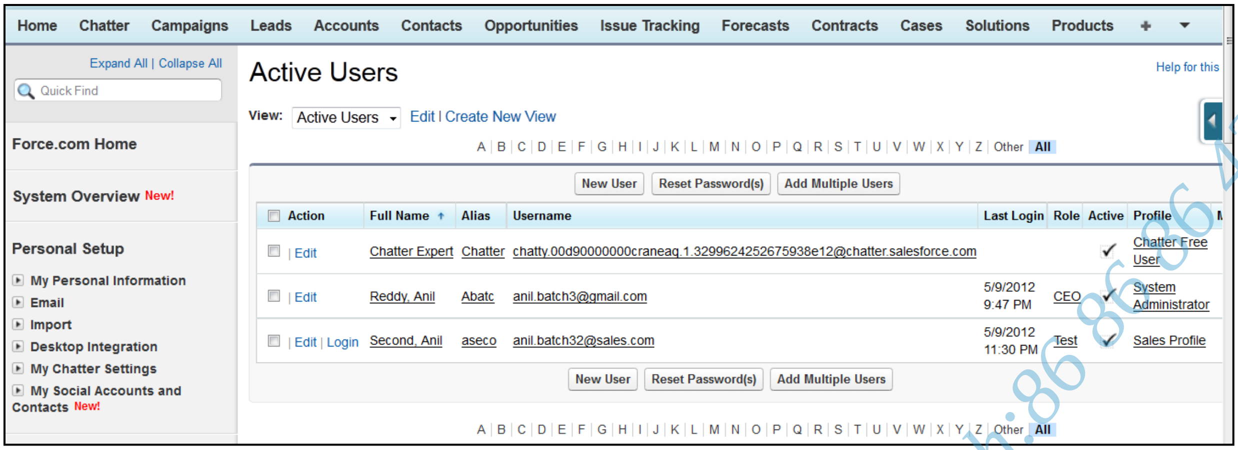
Select the Access Duration from the drop down values. Click on "Save" button



The following screenshots shows the one user(Second, Anil) having different profile other than System Administrators gave access to System Administrators. Then System Administrators can able to see "Login" link next to edit link of that user.

By Clicking on "Login" link, any administrators can able to login into Second, Anil user and access his data.

Note: Mainly this will happen when we are doing testing with number of profile users. We have to test functionality of an application with different users having different profiles.


Home Chatter Campaigns Leads Accounts Contacts Opportunities Issue Tracking Forecasts Contracts Cases Solutions Products
Expand All | Collapse All
Quick Find
Force.com Home
System Overview New!
Personal Setup
My Personal Information
Email
Import
Desktop Integration
My Chatter Settings
My Social Accounts and Contacts New!
Active Users
Help for this
View: Active Users 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
New User Reset Password(s) Add Multiple Users
Action Full Name Alias Username Last Login Role Active Profile
Edit Chatter Expert Chatter chatty.00d90000000craneaq.1.3299624252675938e12@chatter.salesforce.com Chatter Free User
Edit Reddy, Anil Abatc anil.batch3@gmail.com 5/9/2012 9:47 PM CEO System Administrator
Edit | Login Second, Anil aseco anil.batch32@sales.com 5/9/2012 11:30 PM Test Sales Profile
New User Reset Password(s) Add Multiple Users
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

Company Profile:

The company profile contains core information for organization within Salesforce

- Company information and primary contact details
- Default language, locale, and time zone
- Language Settings
- License information
- Business Hours
- Fiscal year settings
- Manage Currencies
- My domain

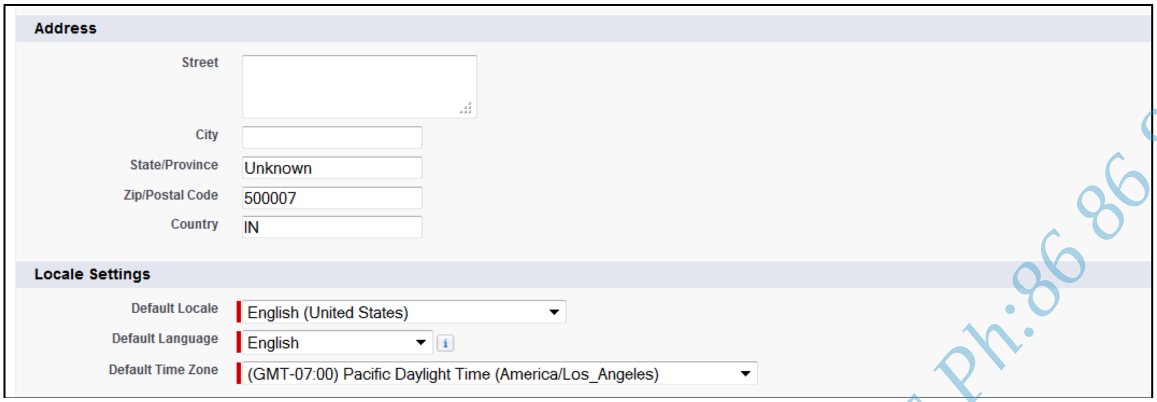
Company information and primary contact details

When company signs up with Salesforce, the information provided is displayed on the Company Information page.
Go to the following path to access the company information page:
Your Name
└→ Setup
  └→ Administration Setup
    └→ Company Profile
      └→ Company Information.

From the Company Information page, we can edit the company default localization settings and primary contact details:

Default language, locale, and time zone
The company information settings for language, locale, time zone can affect how key data is handled for the organization.
Go to the following path

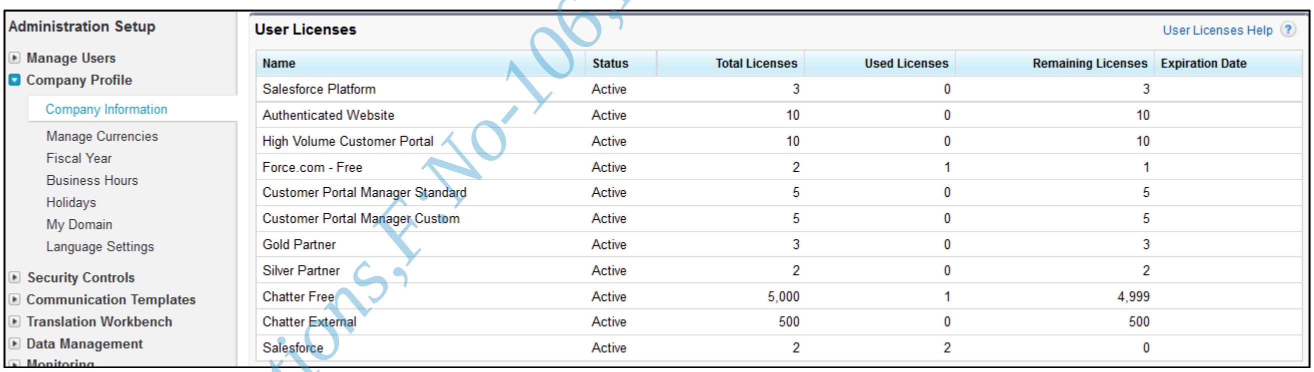
Your Name → Setup→ Administration Setup→ Company Profile →Company Information→ click on "Edit" button



License information

A user license determines user to different functionality within Salesforce and determines the profiles available to the user.
Salesforce bills an organization based on the total licenses and not on active users.

Go to the following path for checking User Licenses:
Your Name → Setup → Administration Setup →Company Profile →Click on Company Information → Go to the User Licenses Section

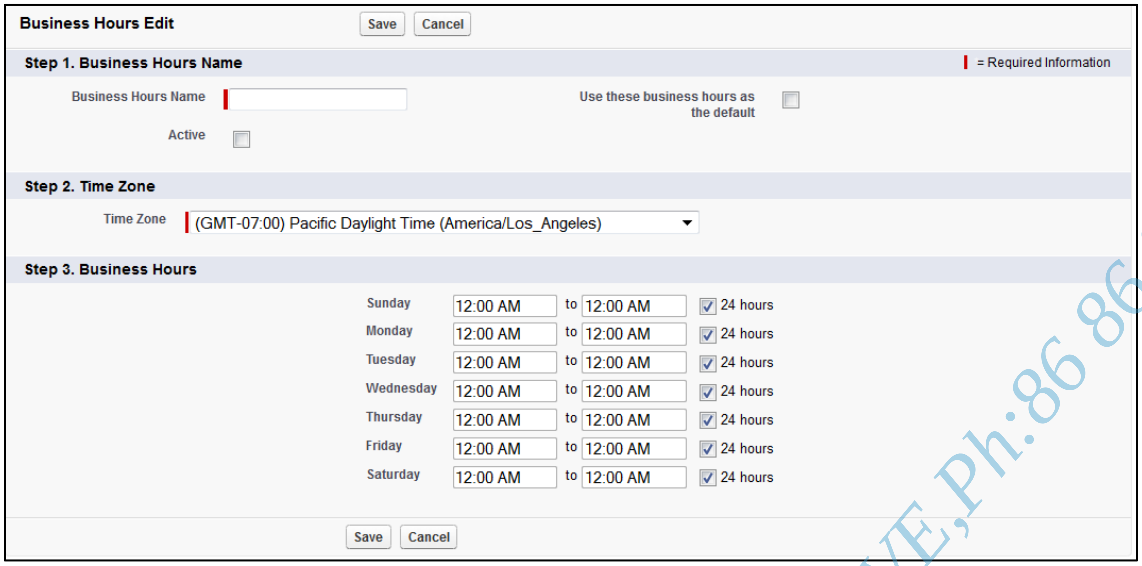


Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
Salesforce Platform	Active	3	0	3	
Authenticated Website	Active	10	0	10	
High Volume Customer Portal	Active	10	0	10	
Force.com - Free	Active	2	1	1	
Customer Portal Manager Standard	Active	5	0	5	
Customer Portal Manager Custom	Active	5	0	5	
Gold Partner	Active	3	0	3	
Silver Partner	Active	2	0	2	
Chatter Free	Active	5,000	1	4,999	
Chatter External	Active	500	0	500	
Salesforce	Active	2	2	0	

Business Hours:

- Using Business Hours, we can select the days and hours that support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.
- If we enter blank business hours for a day, which means organization does not operate on that day.

Go to the following path for Business Hours:
Your Name → Setup → Administration Setup → Company Profile → Click on Business Hours



Manage Currencies and conversion rates:

Currency settings are organization-wide within Salesforce and can be set using either a single currency option using the Currency Locale setting on the Company Profile (or) as a multiple currencies option—where we can add currencies and set conversion rates—using the **Manage Currencies** link within the **Company Profile** section.
Note: Multiple currencies can only be enabled by request to Salesforce customer support. When activated, the Currency Locale field and its value is passed to a new field Corporate Currency also on the Company Profile.

The corporate currency reflects the currency in which company reports revenue and is used as the rate that all other currency conversion rates are based. This is initially set by Salesforce.com when the Salesforce application is activated.

Single currency

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

Multiple currencies:

In a multiple currency organization, we can set the corporate currency instead of the currency locale and Salesforce users can also set their individual currency by following the path
Your Name → Setup → Personal Setup → My Personal Information →Personal Information.

Note: 1. Currency becomes a required field on records where it has been added or was originally defined and so must be considered when activating the Multiple Currencies option and then importing data or custom object creation.

2. Only active currencies can be used in currency amount fields

Active Currencies:

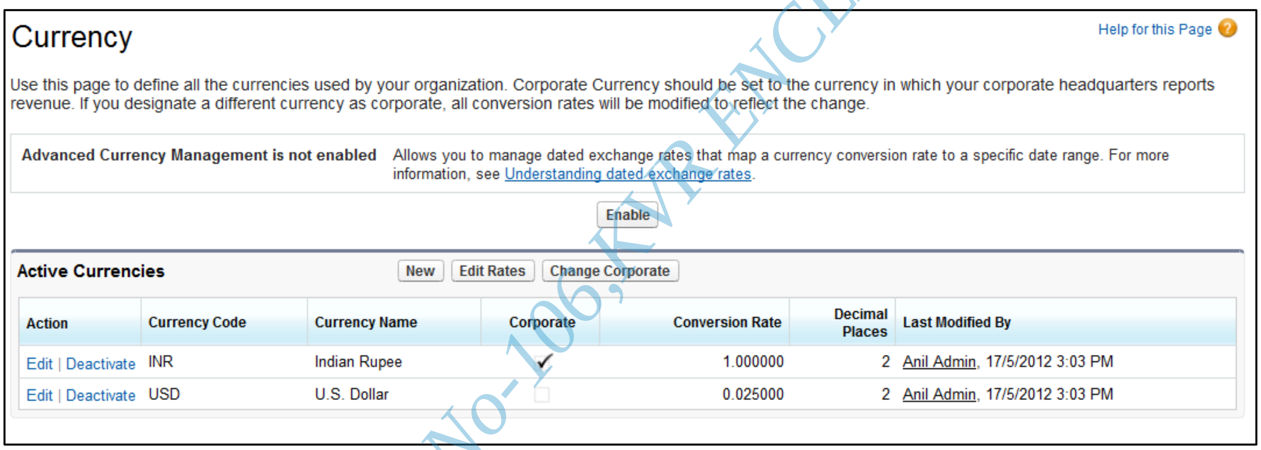
The list of active currencies represent the countries or regions in which company trades. Only an active currency can be set by system administrator, on the organization profile or by users on their individual user records or on data records in currency field.

Manage currencies:

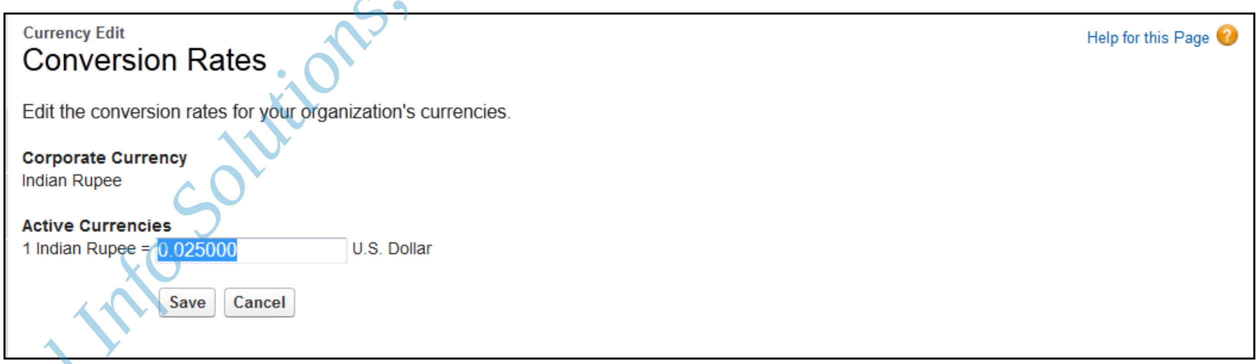
The Manage Currencies section enables us to maintain the list of active currencies and their conversion rates in relation to the corporate currency and can be accessed by following the path Your Name → Setup → Administration Setup → Company Profile → Manage Currencies.

Note: Changing the conversion rates will update all existing records with the new conversion rates even the closed opportunities. As a result we will not be able to measure financial changes due to the effects of currency fluctuations unless we have implemented Advanced Currency Management which stores dated exchange rates.

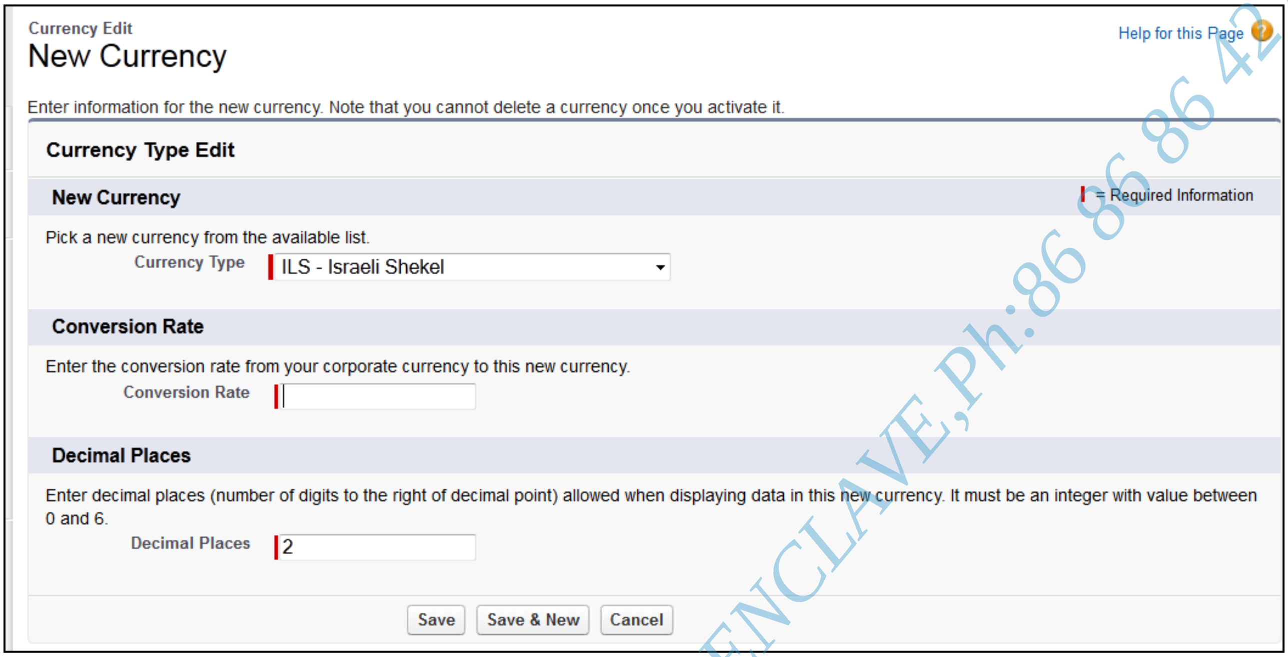
We cannot delete a currency once we activate it.



Click on the "Edit Rates" for editing the conversion rates.

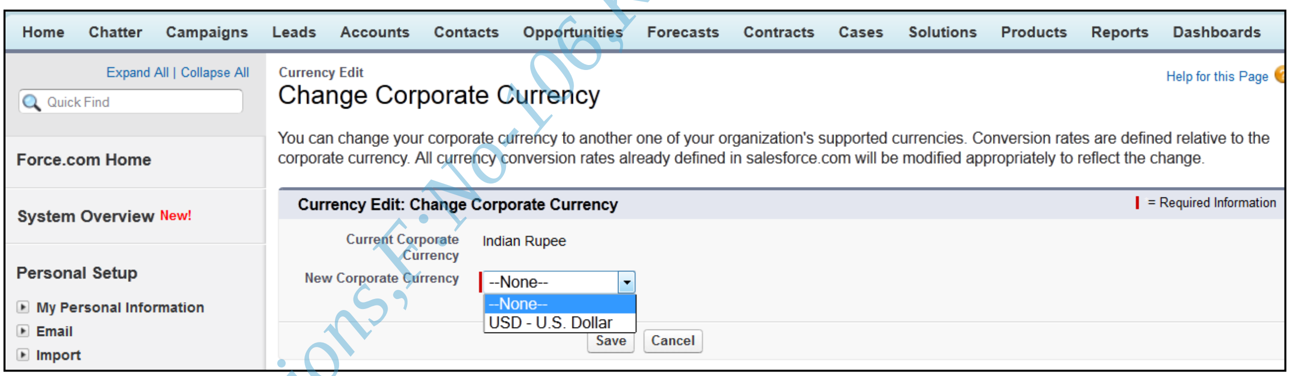


Click on the “New” button for creating the new currency by entering Currency Type, Conversion Rate, and Decimal Places.



Click on "Change Corporate" button for changing the currency type.

Ex: Indian Rupee to U.S Dollar



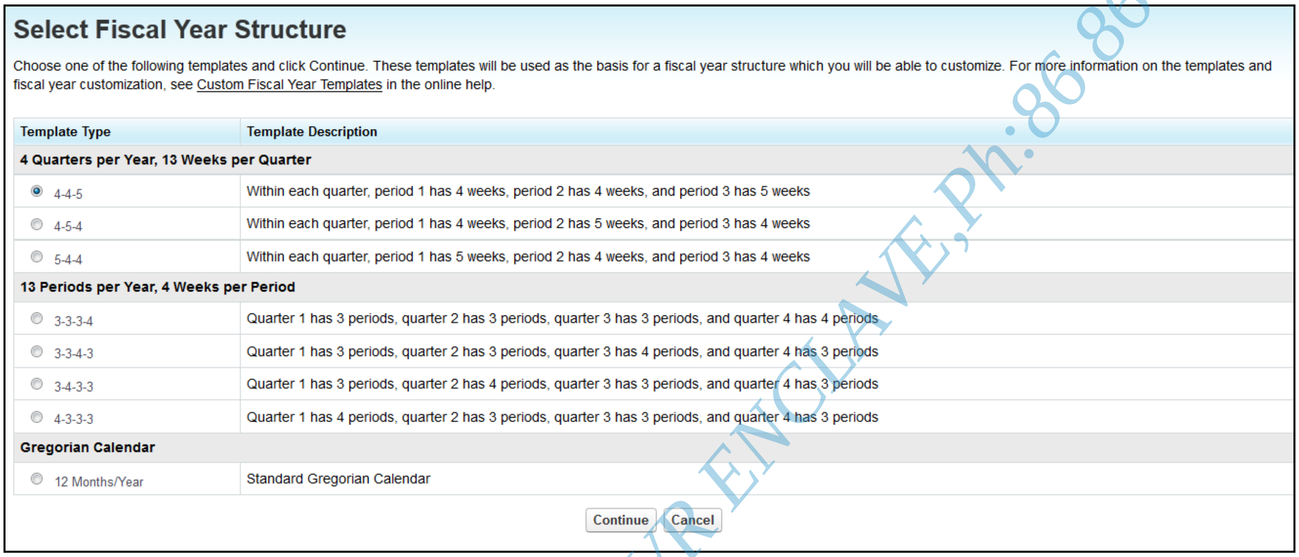
Fiscal Years:

A Fiscal Year is a period of time that an organization uses for financial planning purposes, such as forecasting. Fiscal years usually contain smaller fiscal periods. There are two types of Fiscal Years

- **Standard Fiscal Years** are periods that follow the Gregorian calendar, but can start on the first day of any month of the year. (A Gregorian Year is a calendar based on a 12 Month Structure and is used throughout much of the world.)
- **Custom Fiscal Years** are for companies that break down their fiscal years, quarters and weeks in to custom fiscal periods based on their financial planning requirements.
    - Forecasting can NOT be used with Custom Fiscal Years
    - Customizable Forecasting must be enabled for use with Custom Fiscal Years

- What is a Custom Fiscal Year?
  - Flexibly define fiscal year and other time periods
  - Define once, use everywhere
  - Pre-defined commonly used financial year structures

To View the Fiscal Years, go to the following path,
Your Name --> Setup --> Administrative Setup --> Company Profile --> Click on "Fiscal Year" ---> Click on "New" button



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.

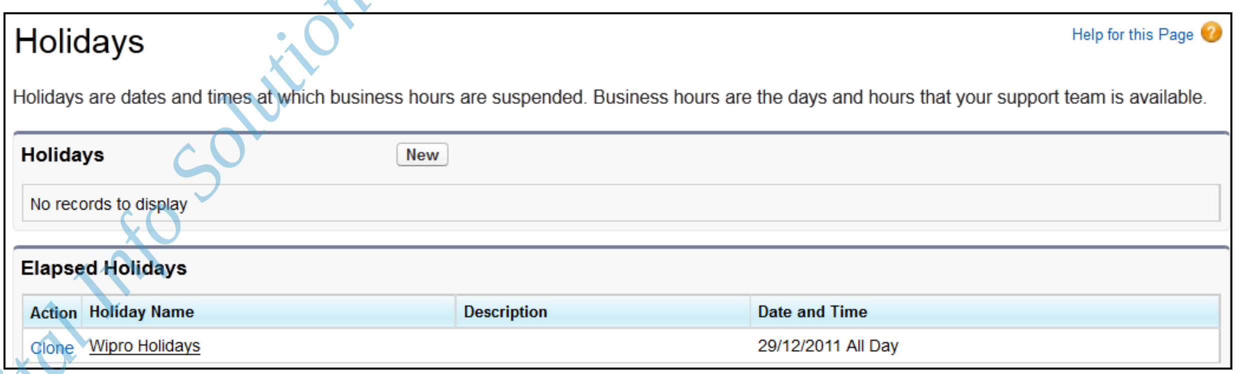
Template Type	Template Description
4 Quarters per Year, 13 Weeks per Quarter	
4-4-5	Within each quarter, period 1 has 4 weeks, period 2 has 4 weeks, and period 3 has 5 weeks
4-5-4	Within each quarter, period 1 has 4 weeks, period 2 has 5 weeks, and period 3 has 4 weeks
5-4-4	Within each quarter, period 1 has 5 weeks, period 2 has 4 weeks, and period 3 has 4 weeks
13 Periods per Year, 4 Weeks per Period	
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
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
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
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	
12 Months/Year	Standard Gregorian Calendar

Continue Cancel

Click on "Continue" button and click on Save button

Holidays:

Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that support team is available.
Go to the following path for creating Holidays for the Organization
Your Name --> Setup --> Administration Setup --> Company Profile --> Holidays ---> Click on "New" button



Holidays

Help for this Page

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

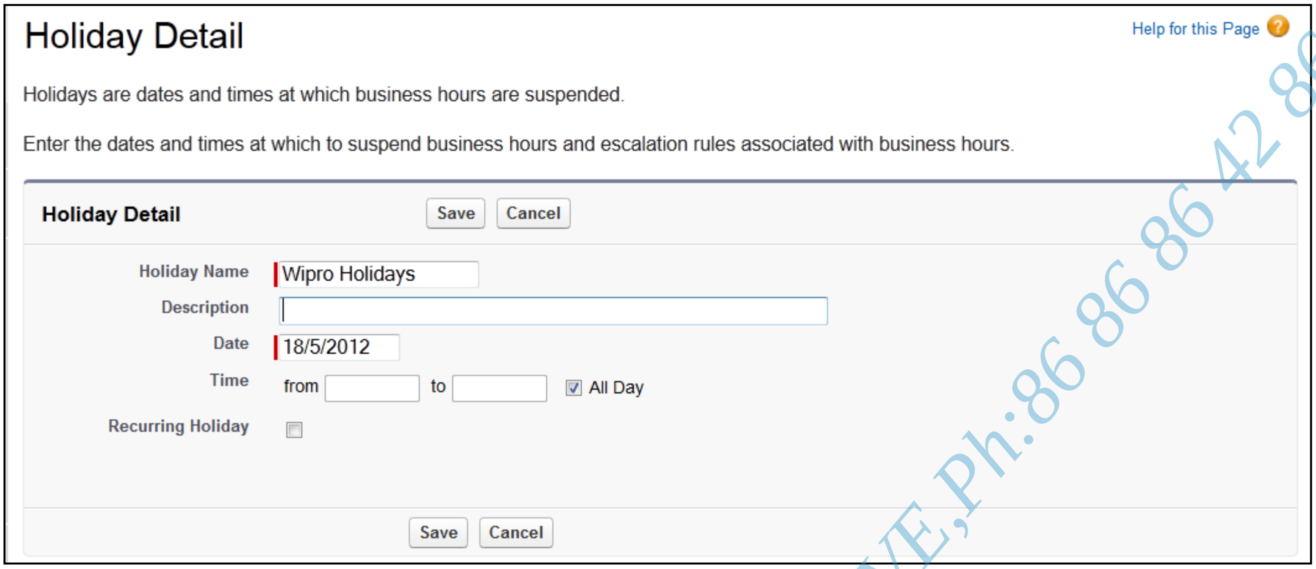
Holidays New

No records to display

Elapsed Holidays

Action	Holiday Name	Description	Date and Time
Clone	Wipro Holidays		29/12/2011 All Day

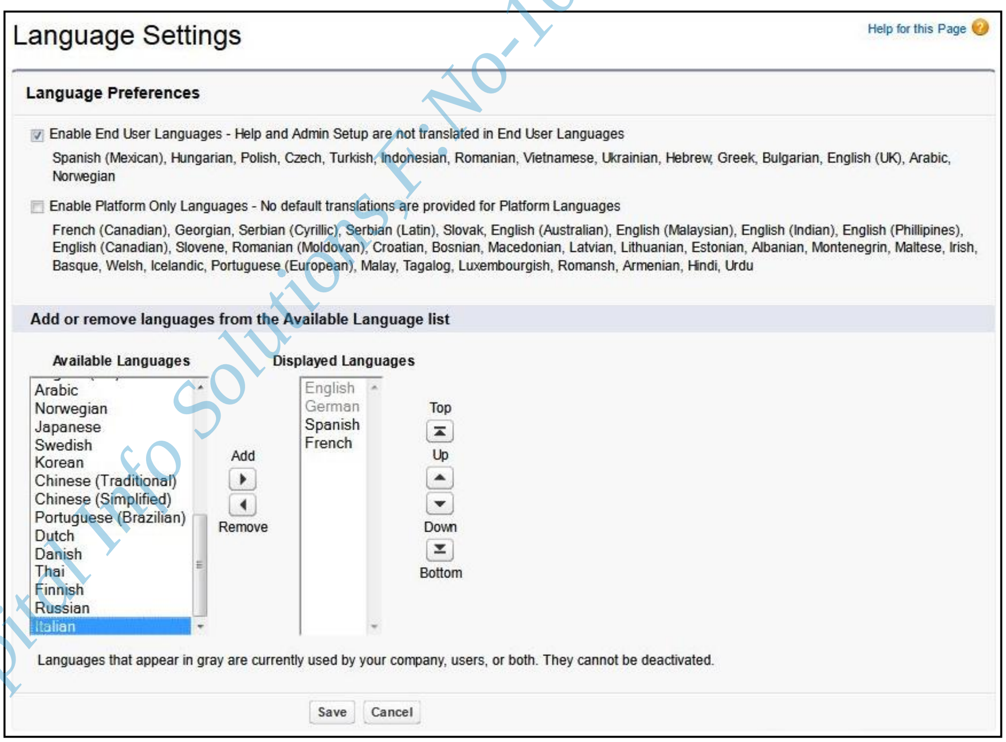
Enter the dates and times at which to suspend business hours and escalation rules associated with business hours. And click on "Save" button



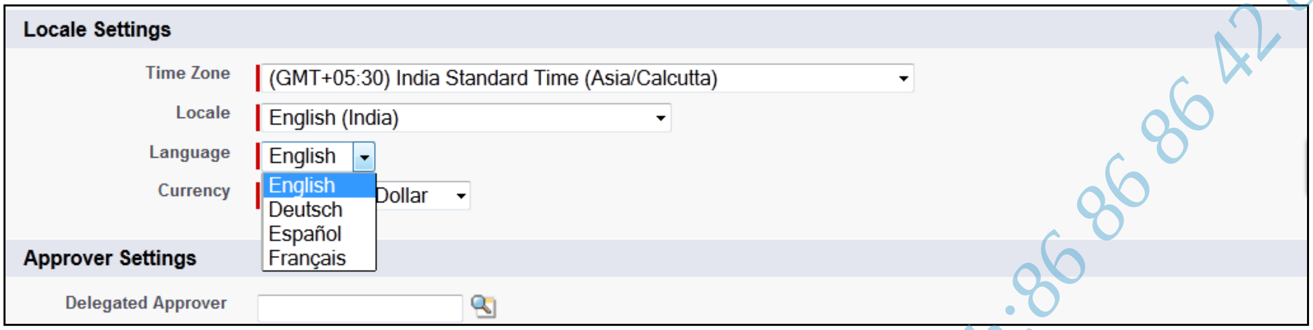
Language Settings

The Language Settings feature allows us to specify the acceptable languages that can be used within the Salesforce CRM application.
This feature can be set by following the path
Your Name --> Setup --> Administration Setup --> Company Profile --> Language Settings.

Then choose the languages that we want to make available to users by selecting them from the Available Languages picklist, and then clicking on Add.
In the example shown next, we have added Spanish and French along with English, and these appear in the Displayed Languages list.



Now the languages that appear in the Displayed Languages list are then shown as available options in the Languages picklist section on user's Personal Information pages as shown below:



Sales force editions:

The editions can be divided into

- → Sales cloud → Contact Manager, group, Professional, Enterprise unlimited.
- → Service cloud → professional, Enterprise, unlimited
- → Data.com → Data.com Clean, Data.com Corporate, Data.com Lists.
- → chatter → chatter and chatterplus
- → Force.com → Force.com one App, Force.com Enterprise, Unlimited
- → Social Enterprise → heroku, radian 6, ...

Editions in Salescloud: (Comparision)

① Contact Manager EDITION:

users: upto 5 user can be added ~~/month~~.

cost: $5/month/user.

facilities: Accounts and contacts, AppExchange app integration, chatter collaboration, document attachments, integration with (Gmail, outlook) google apps integration, Mobile access, Reports, Task and activity tracking.

② GROUP EDITION:

its a sales and marketing for upto five users, with this, we get basic CRM to help your team suceed, including weblead capture to generate leads and reports

campaign managment.

dashboards to be managed through the sales cycle.

You can also get 1 App from AppExchange for free.

cost: $25/month/user

③ Professional edition: complete sales app for any size team, choose professional edition if you want no user limits and a bunch of additional features - like

- Campaign managment
- Email Marketing
- Product lists
- Sales forcasting
- Customizable dashboards
- Case tracking
- Privacy controls.
- Mass Email
- Analytics snapshots.
- Role permissions
- ideas Community.

- You can create more custom objects and use upto 5App Exchange apps.

Cost: $65/month/user.

④ Enterprise edition: This is the most popular edition used.

Cost: $125/user/month.

features: Complete and customize and integrate sales app for your entire business.

And this includes all the features of professional edition and additional features are.

- Workflows and Approvals automation
- Sales teams
- Territory managment
- Offline access.
- Visual Workflow

- profile and page layouts.
- Custom apps and websites.
- developer Sandbox
- Call scripting
- integration via web services API.
- Enterprise analytics.

(5) Unlimited EDITION: The name says it all, unlimited edition, you will receive the Primiest Success Plan with success resources, 24×7 support, unlimited online training, and administration services to help customize the sales cloud for your organization.

Cost: $250/month/user.

Features:
- unlimited customizations
- unlimited custom apps
- unlimited access to 100+ administration services
- Assigned success resource.
- increased storage limits
- Multiple sandboxes
- 24×7 tollfree support.

Service cloud:

supports the following editions.

→ Professional edition → $65/user/month
→ Enterprise edition
→ Unlimited edition

Feature	Personal Edition	Contact Manager	Group Edition
Active Validation Rules	N/A	20 per object	20 per object
Custom Fields	5 per object	25 per object	100 per object
Custom Apps	N/A	1	1
Custom Labels	N/A	N/A	N/A
Custom Objects	N/A	5	50
Custom Objects: Maximum Number of Master-Detail Relationships	N/A	8	8
Documents: Maximum Size of Custom App Logo	20 KB	20 KB	20 KB
Documents: Maximum Size of Document to Upload	5 MB	5 MB	5 MB
Email Templates: Maximum Size	384 KB for text email templates	384 KB for text, HTML, and custom HTML templates and 1 MB for Visualforce templates	384 KB for text, HTML, and custom HTML templates and 1 MB for Visualforce templates
Email to Salesforce: Maximum Size of a Single File Attachment	5 MB	5 MB	5 MB
Email to Salesforce: Total Maximum Size of File Attachments	10 MB	10 MB	10 MB
Field History Tracking: Maximum Number of Standard or Custom Fields Tracked for Standard or Custom Objects	N/A	20	20
Fiscal Years: Maximum Number of Custom Fiscal Years	250	250	250
Formulas: Maximum Number of Characters	3,900 characters	3,900 characters	3,900 characters
Formulas: Maximum Formula Size (in Bytes) When Saved	4,000 bytes	4,000 bytes	4,000 bytes
Permission sets	N/A	N/A	N/A
Sharing Rules	N/A	N/A	N/A
Tabs	N/A	3	5
Users: Maximum Number of Users Created	1	5	10
Custom Report Types	N/A	N/A	50
Scheduled Reports	N/A	N/A	N/A

Relationship Fields	No Additional Limit	25	25
Roll-up Summary Fields	No Additional Limit	10	10
Approval Processes	N/A	N/A	N/A
Active Rules (Limits apply to any combination of active workflow, assignment, auto-response, and escalation rules.	N/A	N/A	N/A
Total Rules Allowed(Limits apply to any combination of workflow, assignment, auto-response, and escalation rules, both active and inactive.)	N/A	N/A	N/A

Professional Edition	Enterprise Edition	Unlimited Edition	Developer Edition
20 per object	100 per object	500 per object	100 per object
100 per object	500 per object	800 per object	500 per object
5	10	unlimited	10
5000	5000	5000	5000
50	200	2000	400
8	8	8	8
20 KB	20 KB	20 KB	20 KB
5 MB	5 MB	5 MB	5 MB
384 KB for text, HTML, and custom HTML templates and 1 MB for Visualforce templates	384 KB for text, HTML, and custom HTML templates and 1 MB for Visualforce templates	384 KB for text, HTML, and custom HTML templates and 1 MB for Visualforce templates	384 KB for text, HTML, and custom HTML templates and 1 MB for Visualforce templates
5 MB	5 MB	5 MB	5 MB
10 MB	10 MB	10 MB	10 MB
20	20	20	20
250	250	250	250
3,900 characters	3,900 characters	3,900 characters	3,900 characters
4,000 bytes	4,000 bytes	4,000 bytes	4,000 bytes
N/A	1000	1000	1000
300 sharing rules per object, including up to 50 criteria-based rules.	300 sharing rules per object, including up to 50 criteria-based rules.	300 sharing rules per object, including up to 50 criteria-based rules.	300 sharing rules per object, including up to 50 criteria-based rules.
10	25	Unlimited	100
Unlimited	Unlimited	Unlimited	2
50	200	2000	400
one per hour	one per hour	two per hour	one per hour

25	25	25	25
10	10	10	10
N/A	15 steps per process 25 approvers per step 500 approval processes per object 1,000 processes per organization	15 steps per process 25 approvers per step 500 approval processes per object 1,000 processes per organization	15 steps per process 25 approvers per step 500 approval processes per object 1,000 processes per organization
50 per object	50 per object	50 per object	50 per object
300 per object 1,000 per organization	300 per object 1,000 per organization	300 per object 1,000 per organization	300 per object 1,000 per organization