7. JULY 2021

Salesforce Admin Training

Agenda

1 **Intro**
Setup Navigation, Setup Access

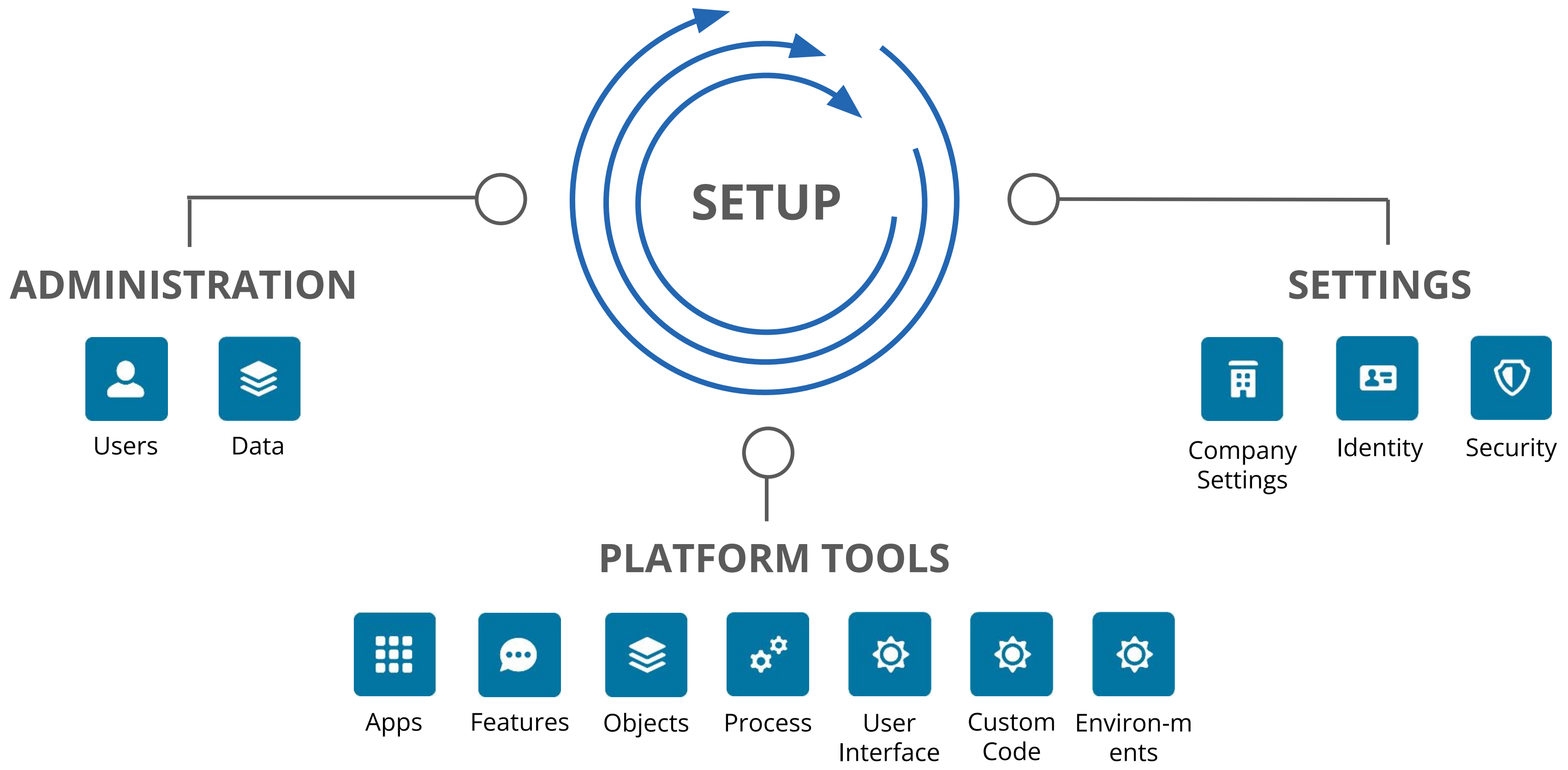
2 **Administration**
Users, Data Management

3 **Settings**
Company Information, Login History, Sharing Settings

4 **Platform Tools**
App Manager, Chatter Settings, Object Manager, Process Builder

Setup

Overview

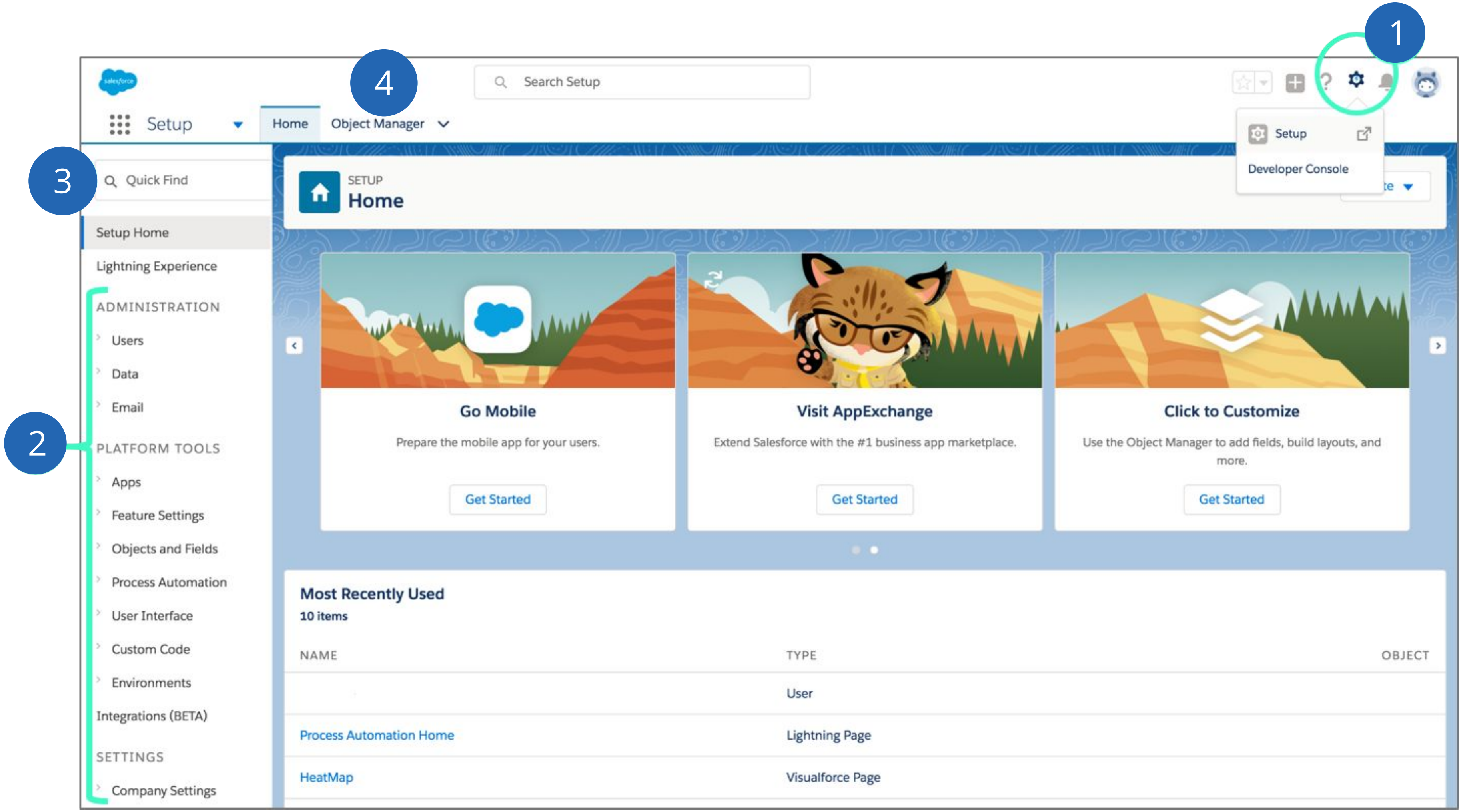


Setup

Setup Access

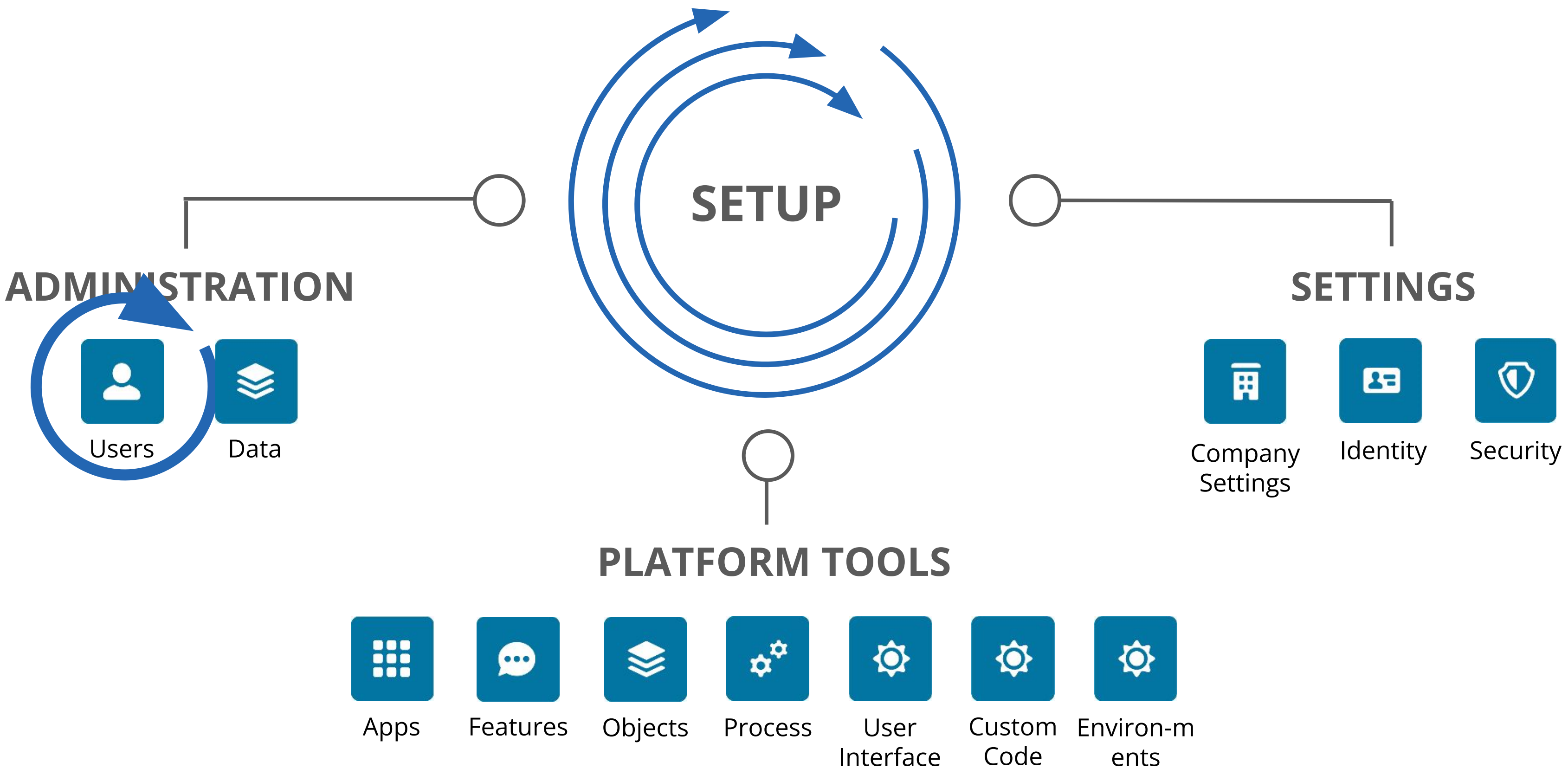
Overview

1. From any page, you can click the gear icon in the upper right corner and select Setup
2. Use the setup tree to quickly find what you need to change without searching
3. If you can't find a specific subcategory, just search for it in the Quick Find search bar
4. Click on Object Manager to find all your objects - custom and standard - in one place



Setup

Overview

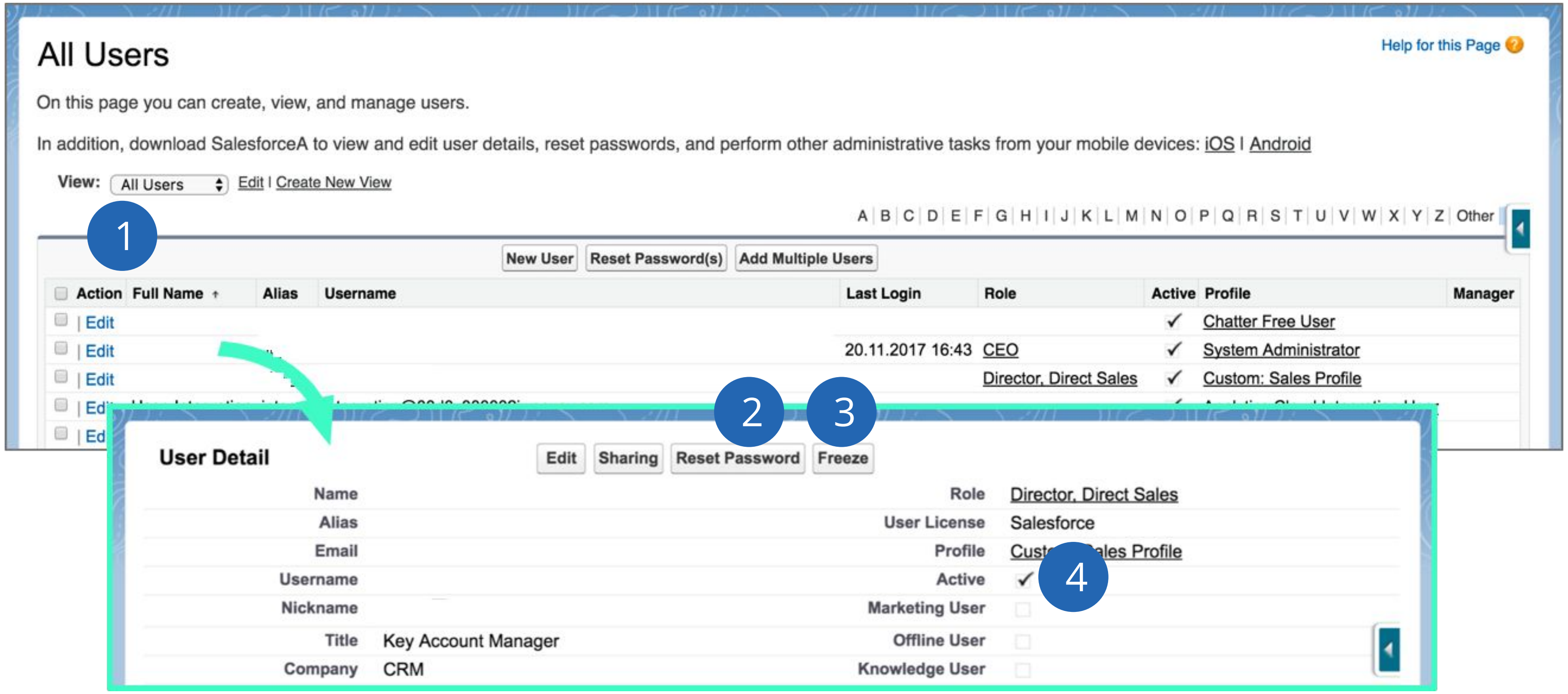


Users

Setup | Users | Users

Manage User

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



Profiles

Setup | Users | Profiles

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

General information about profiles

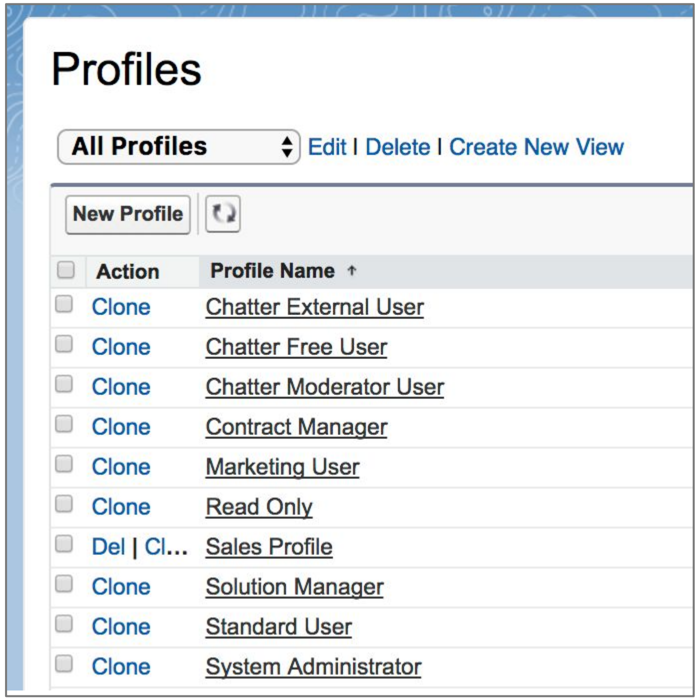
- When creating a user, a profile must be assigned. Each user can have one profile
- Standard profiles are available, custom profiles can be created
- Tipp: Clone a standard profile and adjust it to your needs

A profile determines what a user can do

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

A profile describes what a user can see

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

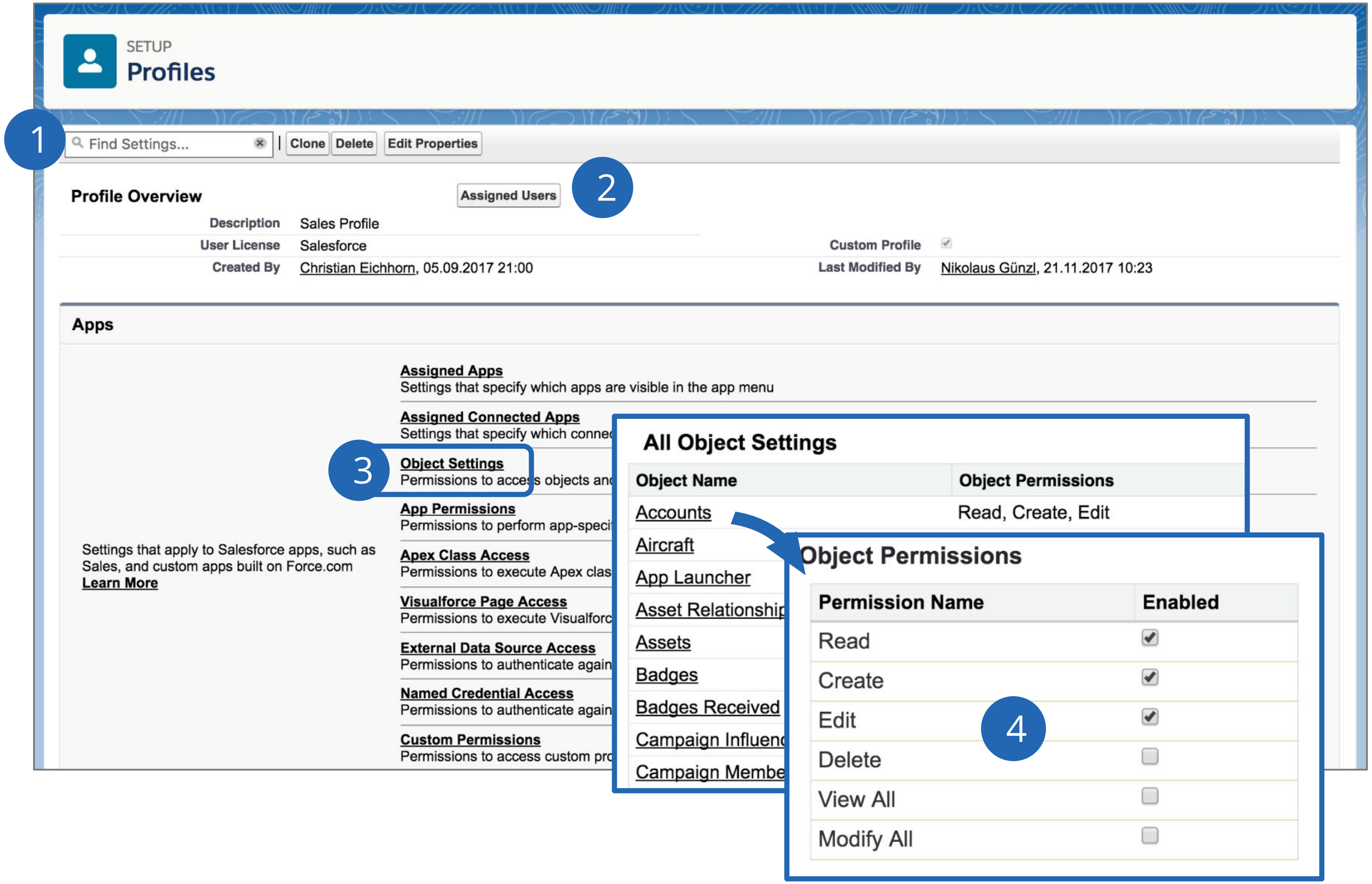


Profiles

Setup | Users | Profiles

Object Settings

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

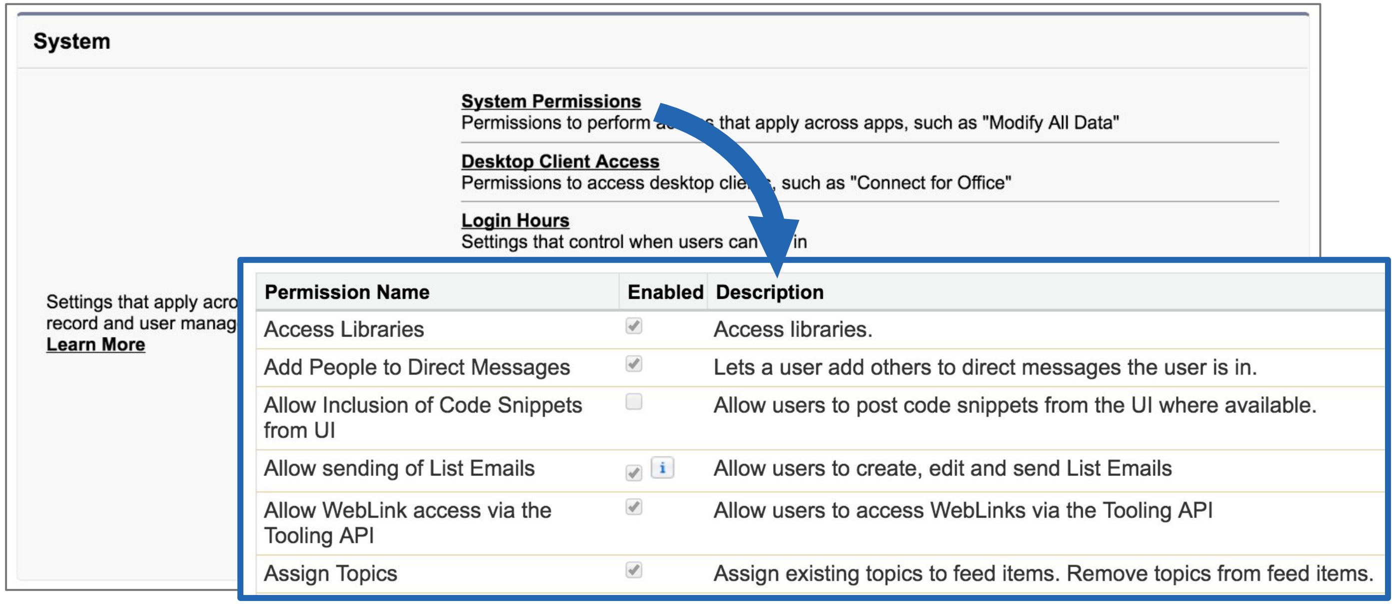


Profiles

Setup | Users | Profiles

Important System Permissions

- Create and Customize Dashboards
- Create and Customize List Views
- Create and Customize Reports
- Create and Own New Chatter Groups
- Create Report Folders
- Export Reports
- Hide Option to Switch to Salesforce Classic
- Lightning Experience User
- Manage Public List Views
- Mass Edits from Lists
- Run Reports
- View Setup and Configuration



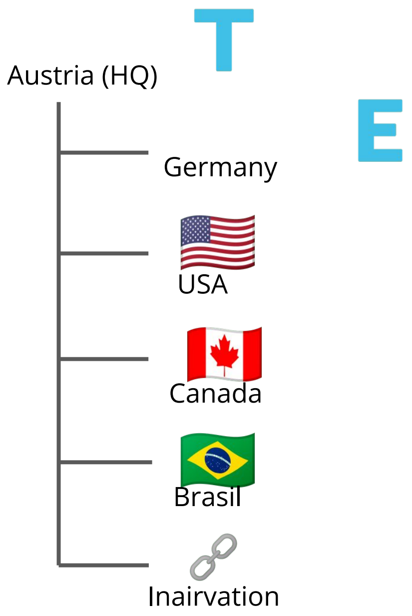
Roles

Setup | Users | Roles

Role Hierarchy

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

Role Hierarchy F/LIST



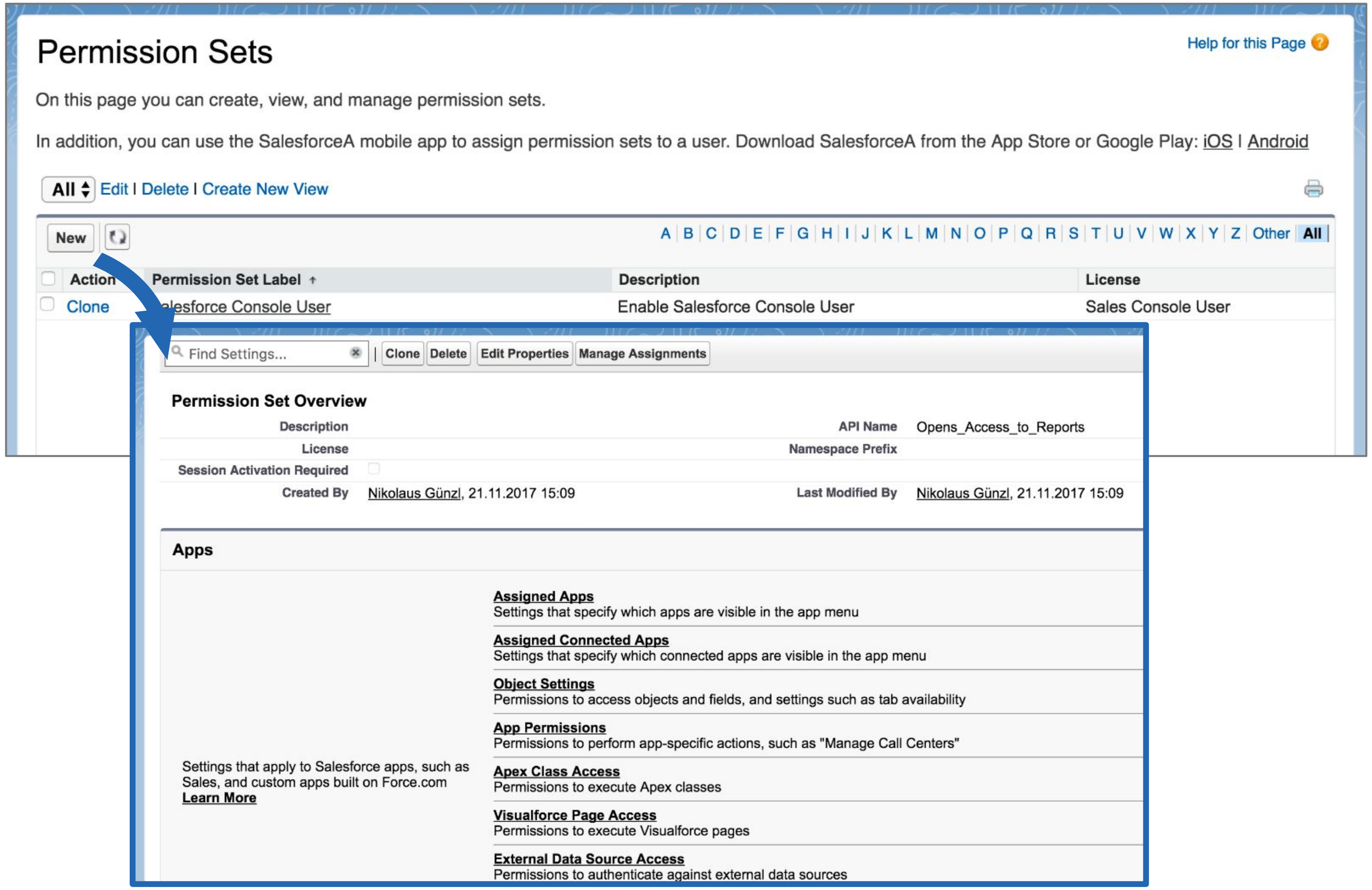
The Role Hierarchy is a functional setup to manage access, not an org chart!

Permission Sets

Setup | Users | Permission Sets

Permission Sets

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

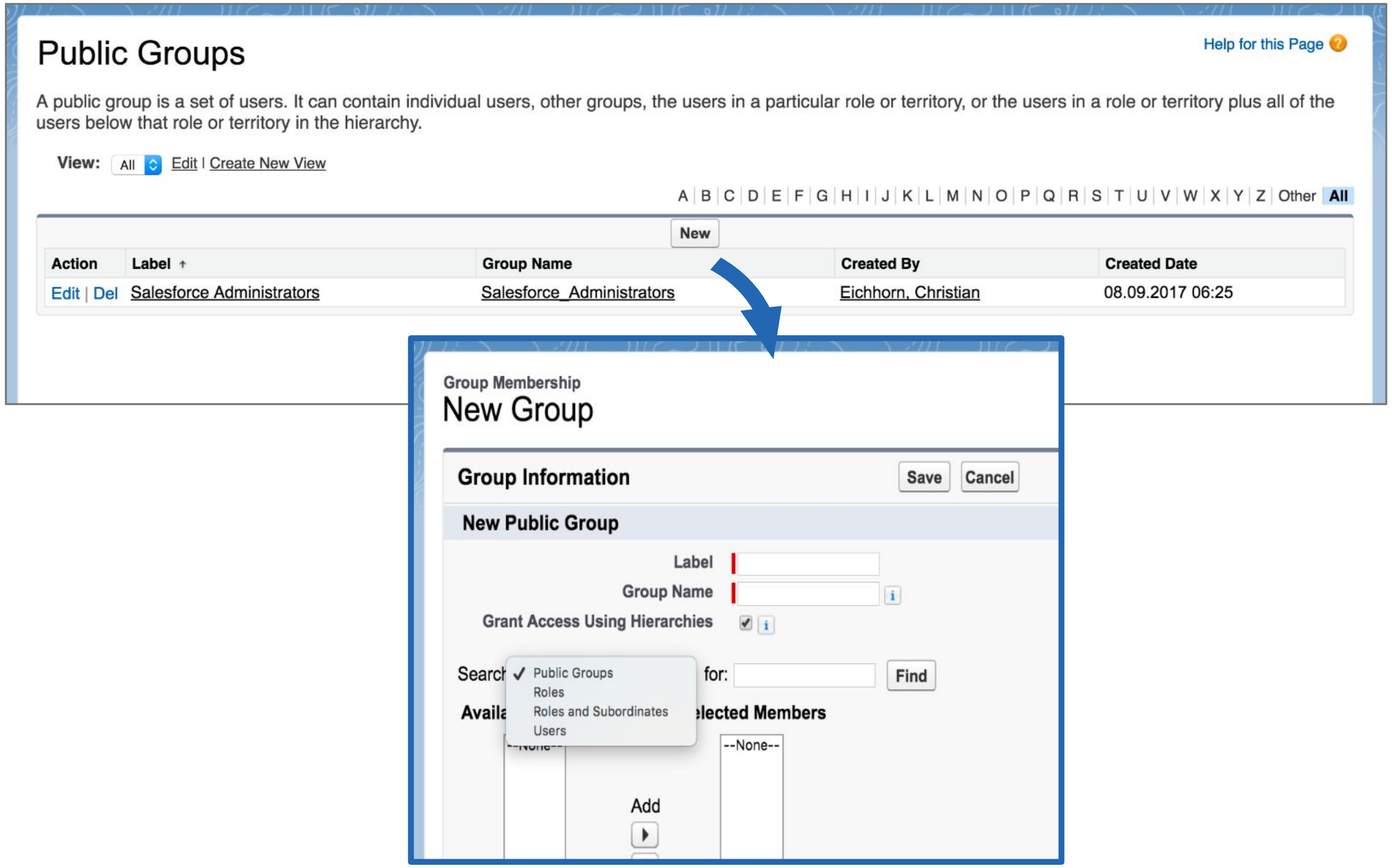


Public Groups

Setup | Users | Public Groups

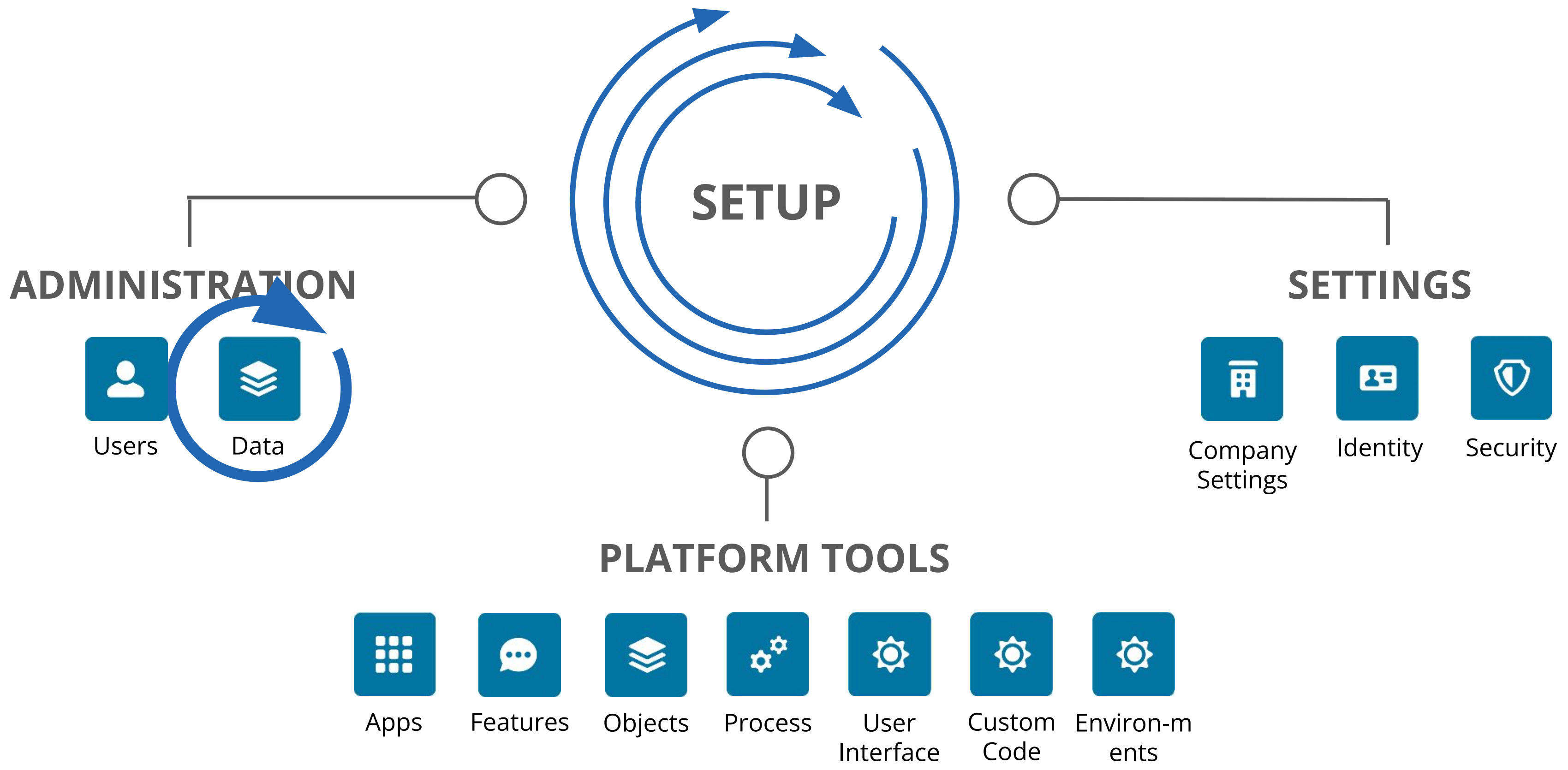
Groups

- A public group consists of a set of users. Following can be added:
  - Other Public Groups
  - Roles
  - Roles and Subordinates
  - Users
- A public group can only be created by Administrators but everyone in the organization can use such groups
- Within Public Groups it can be defined, if access should be granted by using the roll-up access functionality of the Role Hierarchy



Setup

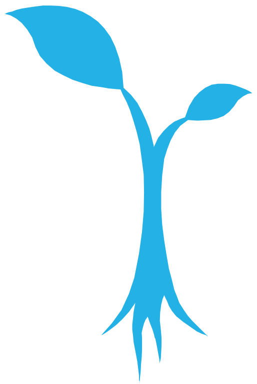
Overview

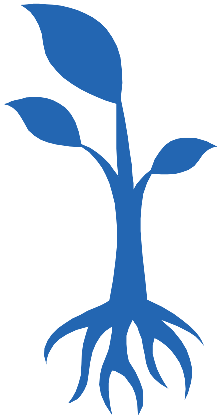


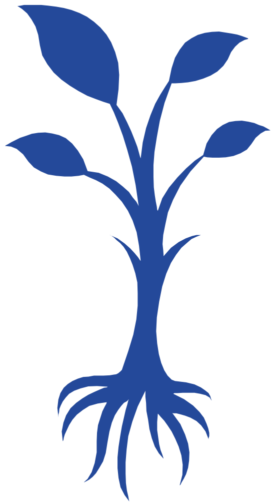
Data Import Wizard

Setup | Data | Data Import Wizard

Import your data in 4 easy steps







1. Prepare your data

for import and create an import file. Doing this step first prevents errors, duplication of data, and frustration. See how to clean your date in this video.

2. Start the wizard

and choose the data you want to import. Select Standard- or Custom objects depending in which data you want to import. Choose if you want to add new or update existing records

3. Edit field mapping

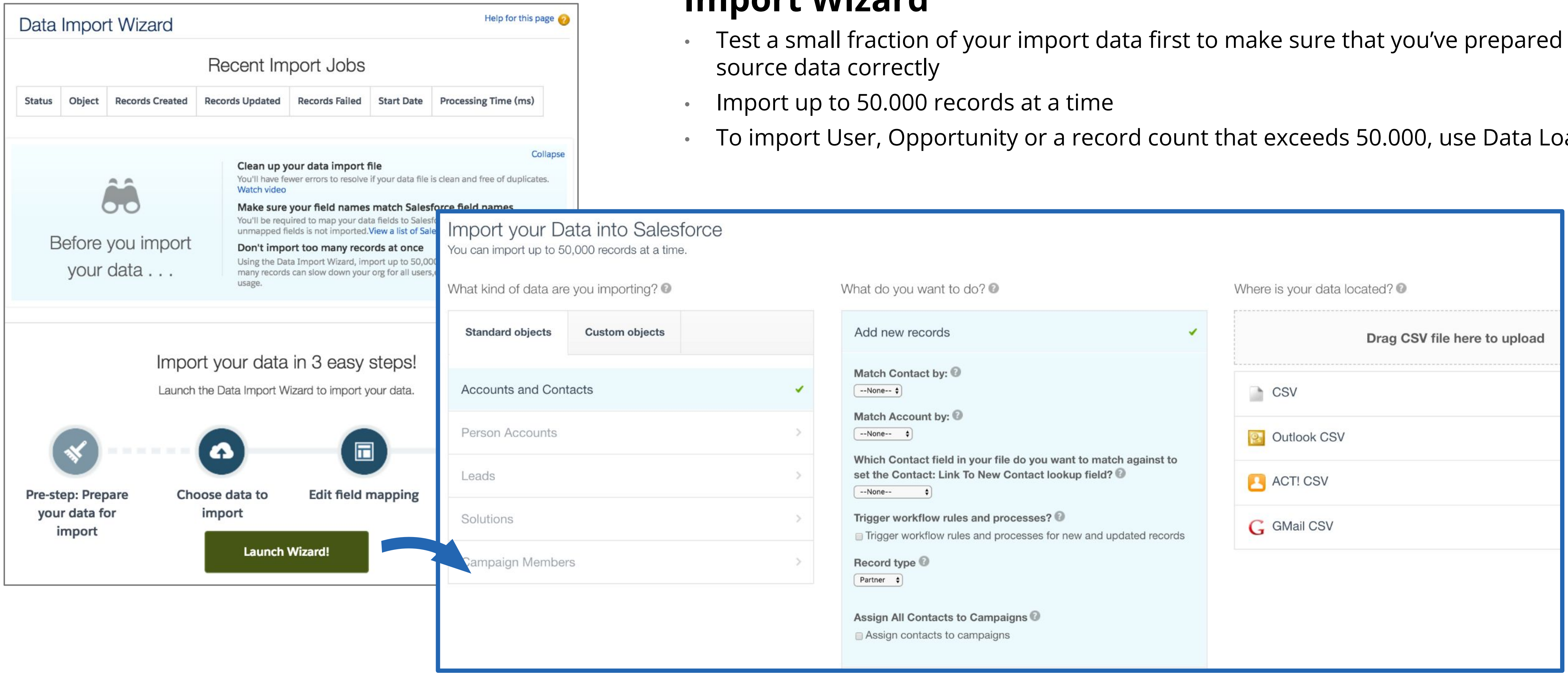
Salesforce maps as many fields as possible. Make sure your field names match Salesforce field names. Unmapped fields are not imported into Salesforce

4. Review

your import information on the Review page, start the import and check the import status afterwards

Data Import Wizard

Setup | Data | Data Import Wizard



Import Wizard

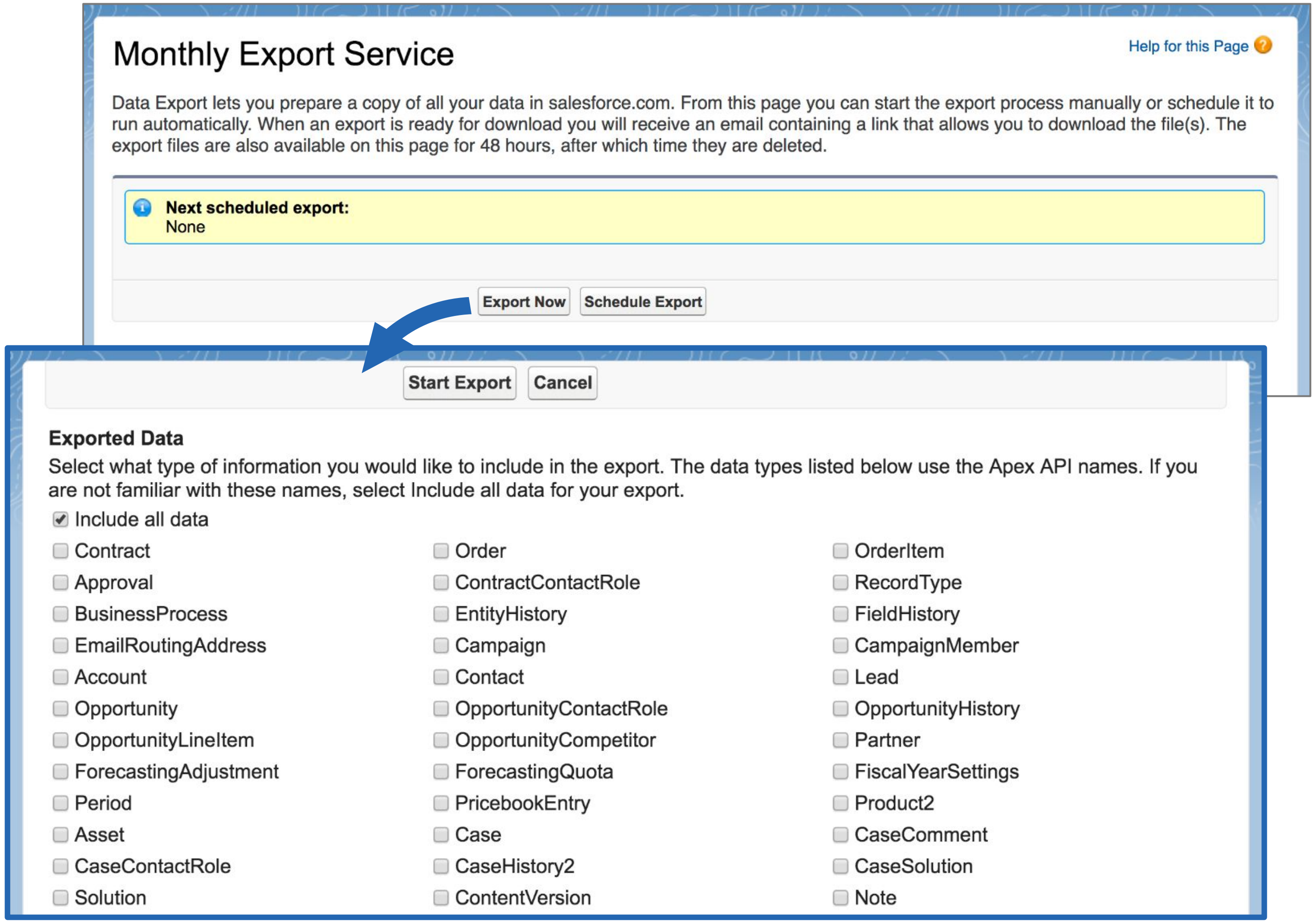
- Test a small fraction of your import data first to make sure that you've prepared your source data correctly
- Import up to 50.000 records at a time
- To import User, Opportunity or a record count that exceeds 50.000, use Data Loader

Data Export

Setup | Data | Data Export

Export your data

- Data Export generates backup files of your data on a weekly or monthly basis (depending on your edition)
- Choose if single objects or all data should be exported into a set of comma-separated values (CSV) files
- Exports complete as soon as possible, however Salesforce can't guarantee the date and time of completion



Duplicate Rules

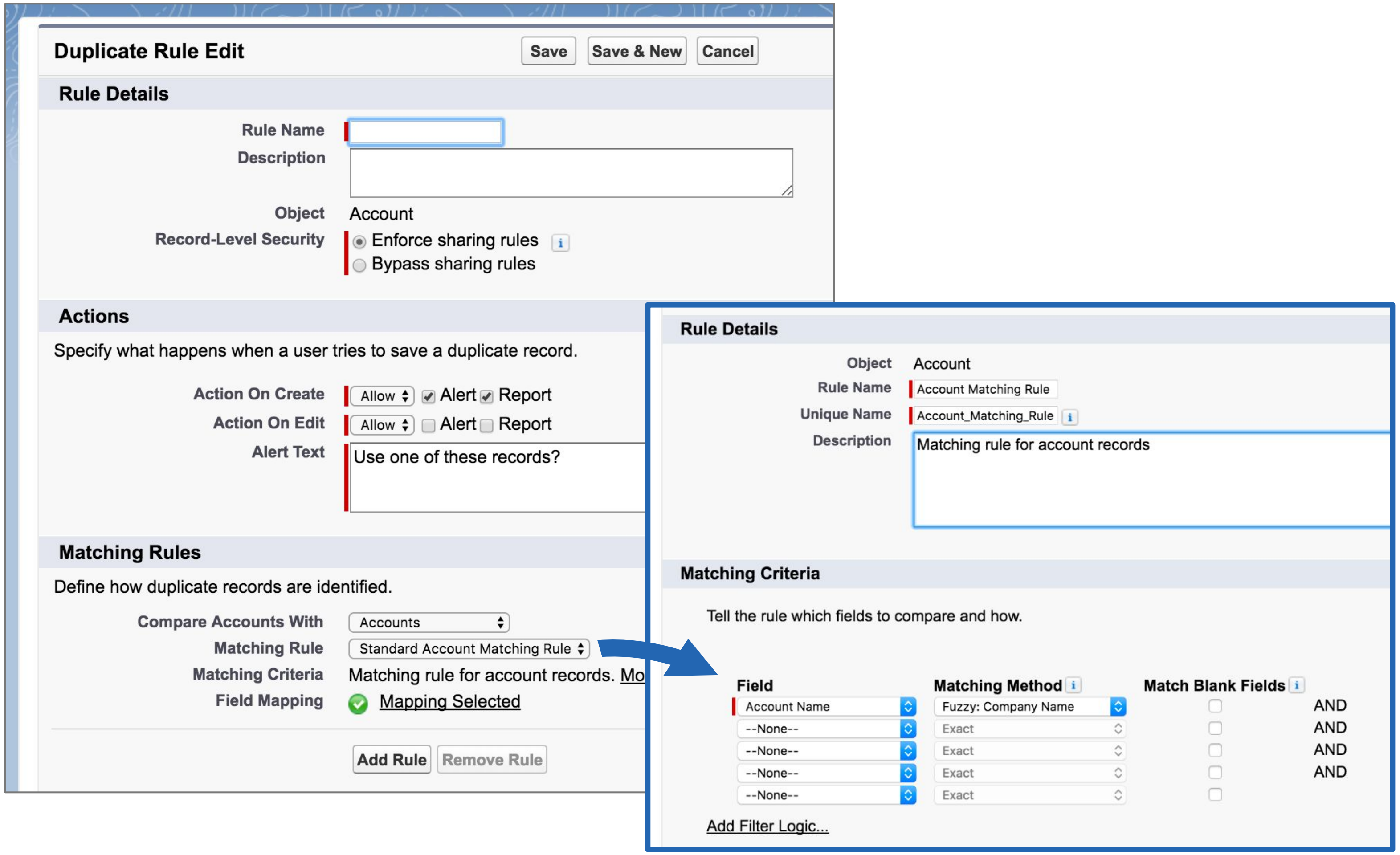
Setup | Data | Duplicate Management | Duplicate Rules and Matching Rules

Duplicate Rule

- Use duplicate rules to define what happens when a user tries to save a duplicate record
- Specify an action that triggers when a user tries to save a duplicate record
- Select a matching rule for this duplicate rule
- Notice: Matching rules must be created before creating a duplicate rule

Matching Rule

- A matching rule consists of fields and matching methods, which determine how the rule compares records
- Select matching method Fuzzy, if values should match approximately, or Exact, if values should match exactly
- Set the checkbox Match Blank Fields if blank fields should be considered as matches

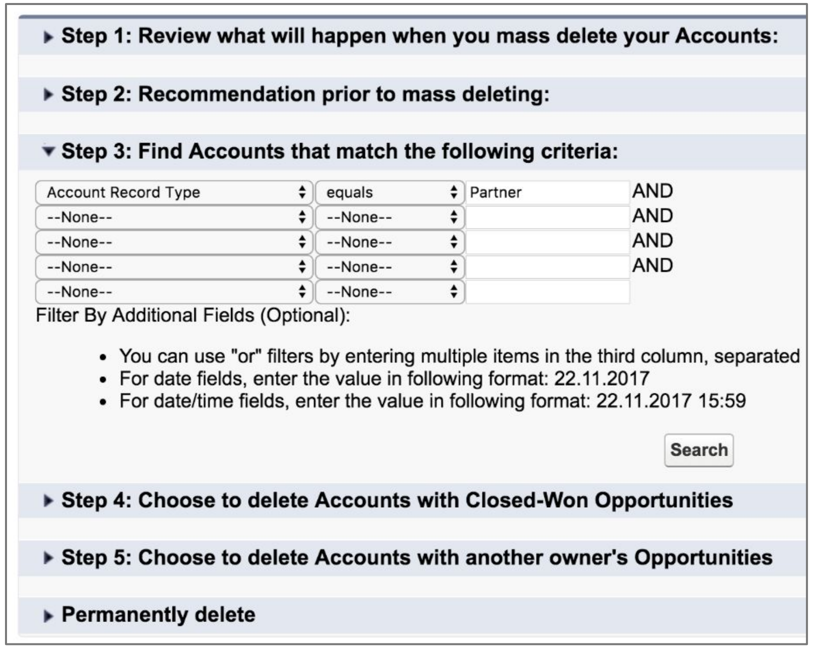


Mass Delete/Transfer Records

Setup | Data | Mass Delete/Transfer Records

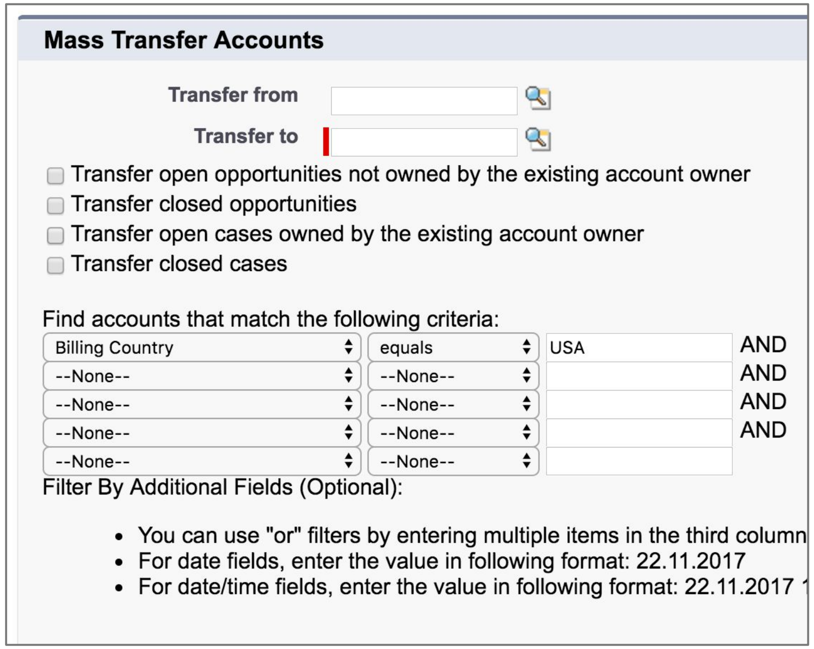
Mass Delete Records

- Delete multiple reports or records at the same time
- Use this tool for instance when a user imported his leads incorrectly and he wants to start over



Mass Transfer Records

- Transfer multiple accounts, leads and custom objects from one user to another
- Use this for transferring ownership and access rights

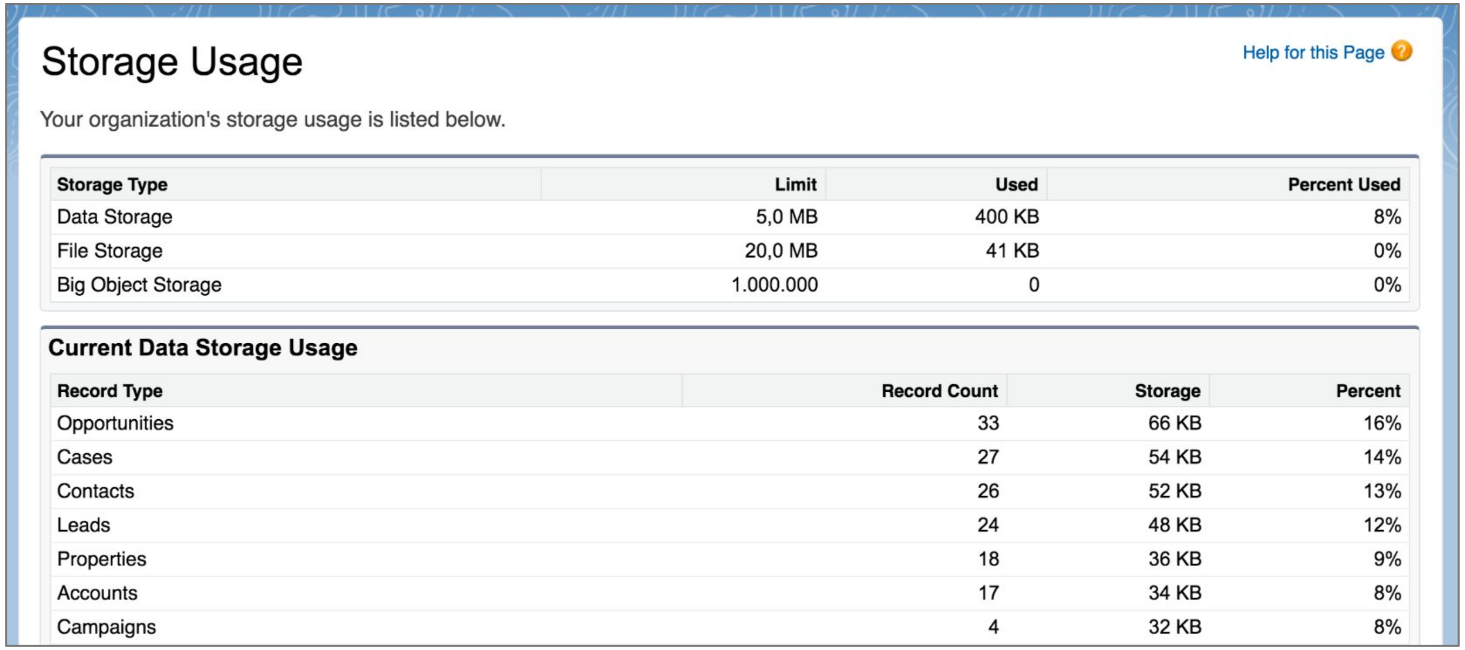


Storage Usage

Setup | Data | Storage Usage

Storage

- You can view the available space for data storage and file storage, the amount of storage in use per record type, the top users according to storage utilization, and the largest files in order of size. To view what types of data a particular user is storing, click that user's name
- Individual users can view their own storage usage in their personal information
- When you need more storage, increase your storage limit or reduce your storage usage by deleting outdated leads or contacts and removing any unnecessary files and attachments



Storage Usage

Help for this Page

Your organization's storage usage is listed below.

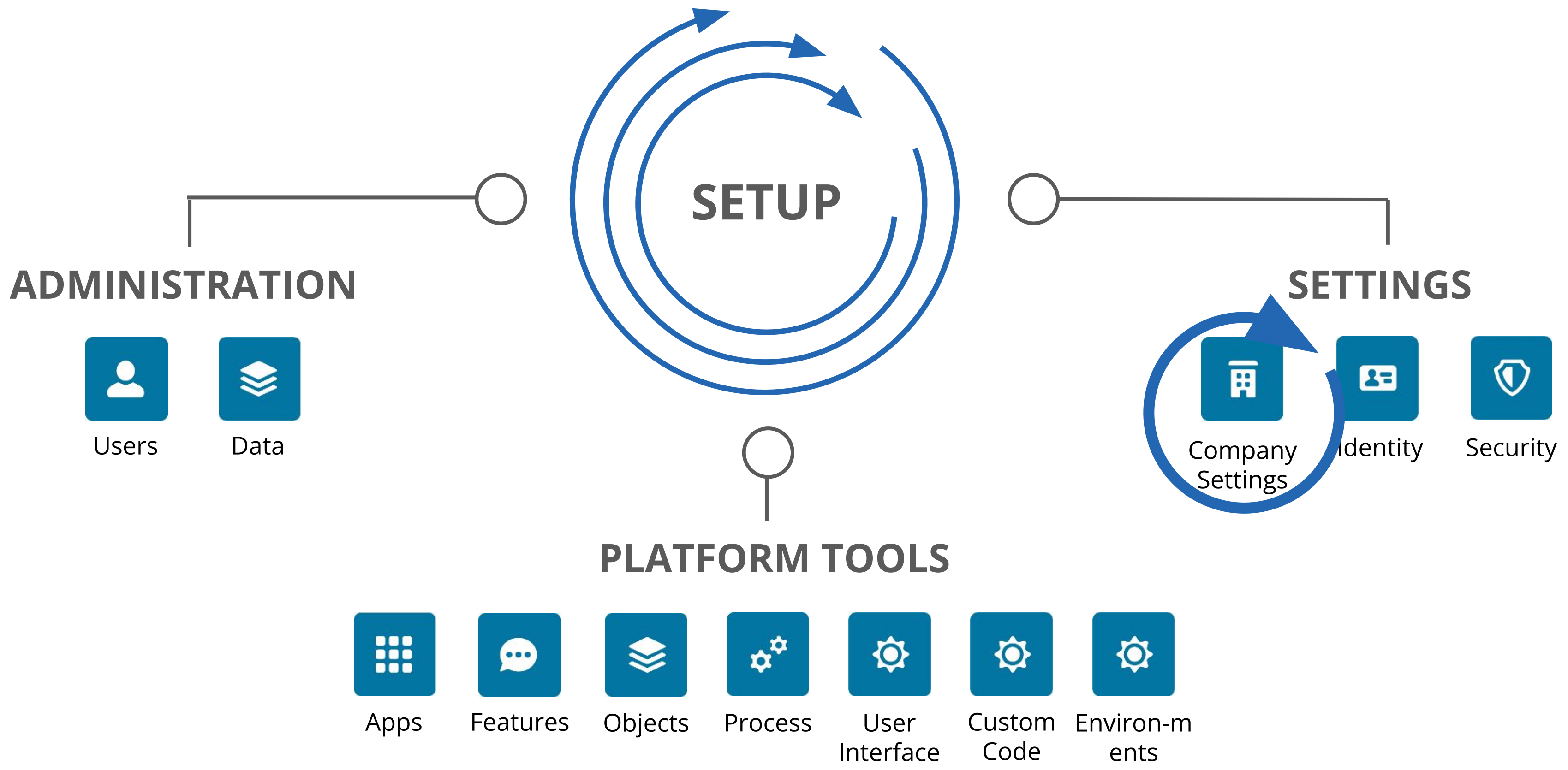
Storage Type	Limit	Used	Percent Used
Data Storage	5,0 MB	400 KB	8%
File Storage	20,0 MB	41 KB	0%
Big Object Storage	1.000.000	0	0%

Current Data Storage Usage

Record Type	Record Count	Storage	Percent
Opportunities	33	66 KB	16%
Cases	27	54 KB	14%
Contacts	26	52 KB	13%
Leads	24	48 KB	12%
Properties	18	36 KB	9%
Accounts	17	34 KB	8%
Campaigns	4	32 KB	8%

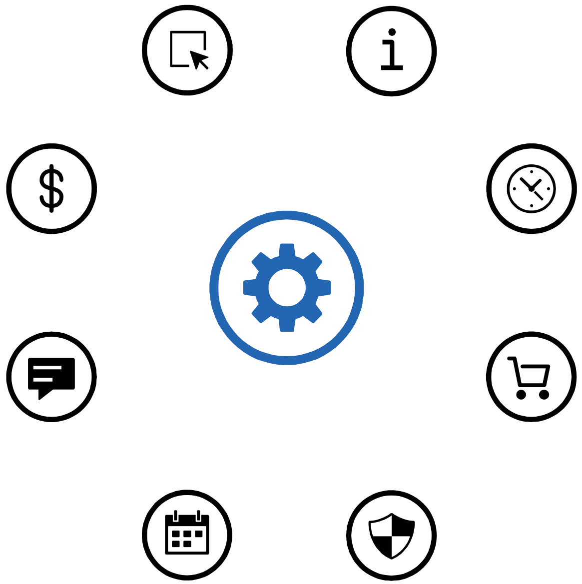
Setup

Overview



Company Settings

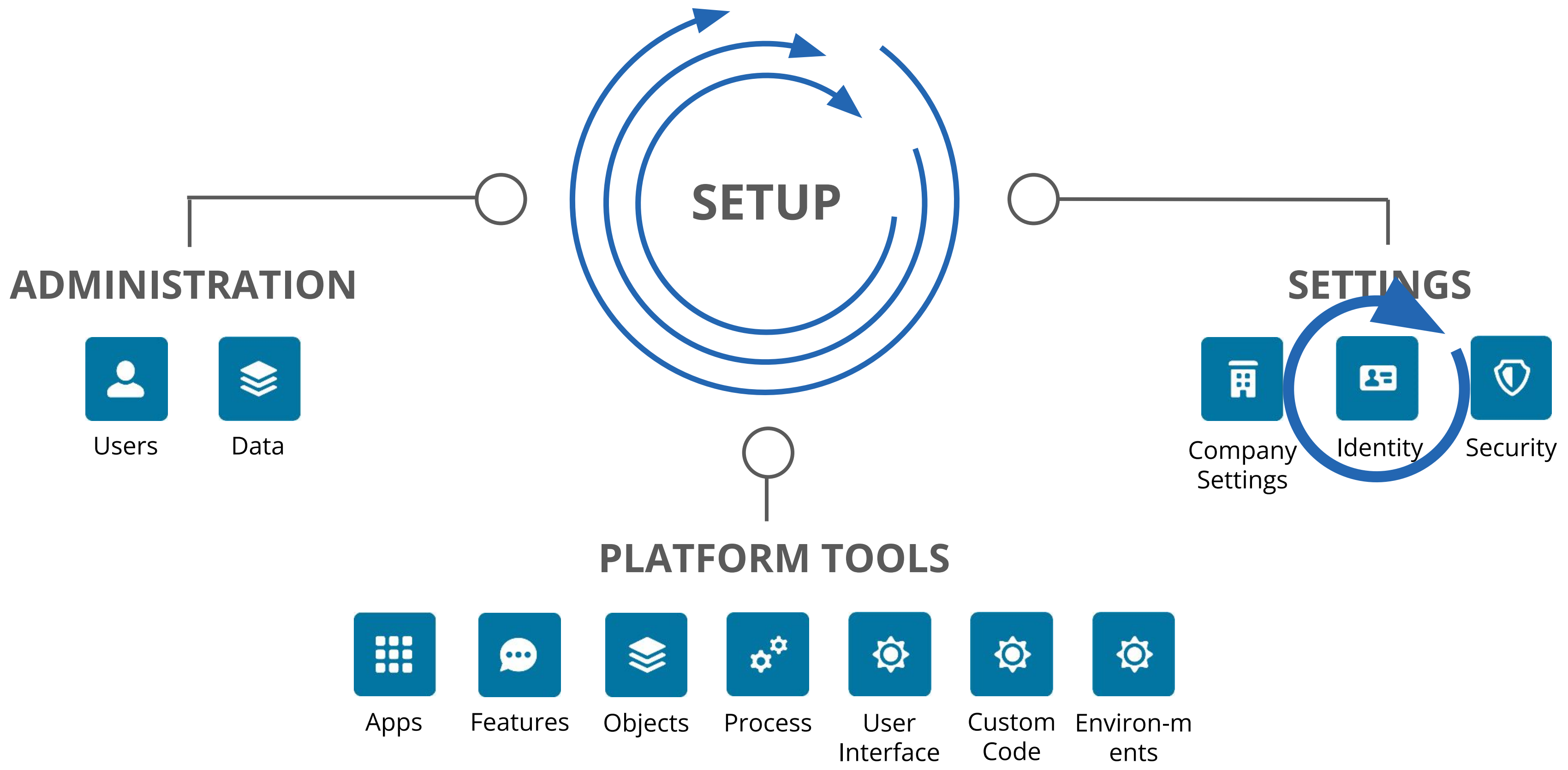
Overview



Company Information	Locale, Language, Time Zone, Currency, Data Space, Organization ID, Salesforce-Edition, User Licenses
Business Hours	Specify the hours when your support team is available to serve customers
Checkout	Salesforce.com online store and order center
Critical Updates	Lists critical updates that are scheduled for activation in your organization
Fiscal Years	Set up a custom fiscal year for your organization
Language Settings	Add and change languages you want your site to support
Manage Currencies	Define currencies used by your organization and add conversion rates
My Domain	Set up a custom domain for your organization and customize your login page

Setup

Overview

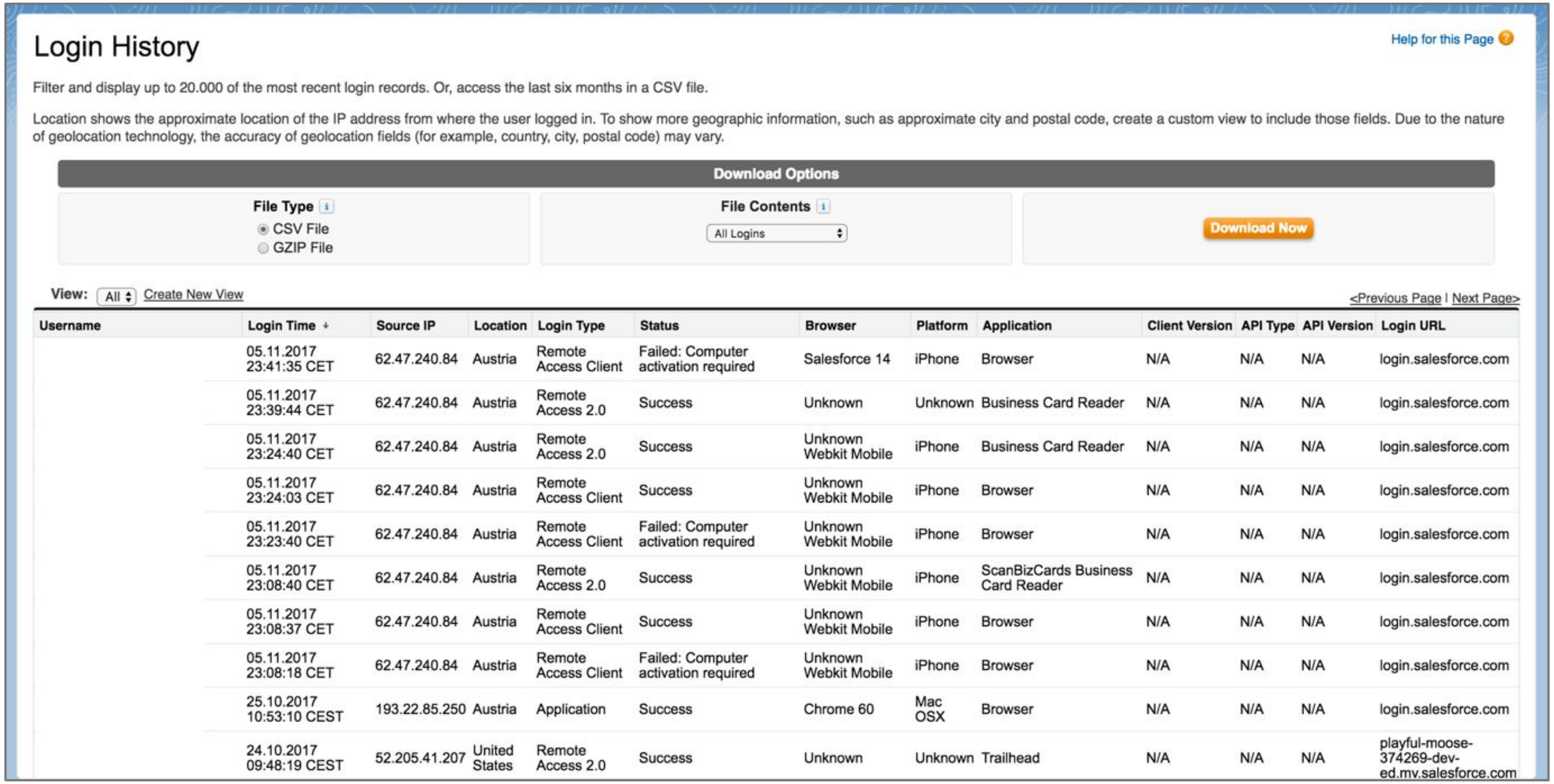


Login History

Setup | Identity | Login History

Monitor Logins

- Monitor which users logged in when, from where and the status of the login - e.g. invalid password or computer activation required
- The login history page displays the most recent 20.000 attempts. To see more records, download the information to a CSV or GZIP file
- Users can view their own login history in their personal information



Login History

Help for this Page

Filter and display up to 20.000 of the most recent login records. Or, access the last six months in a CSV file.

Location shows the approximate location of the IP address from where the user logged in. To show more geographic information, such as approximate city and postal code, create a custom view to include those fields. Due to the nature of geolocation technology, the accuracy of geolocation fields (for example, country, city, postal code) may vary.

Download Options

File Type: CSV File / GZIP File

File Contents: All Logins

Download Now

View: All | Create New View

<Previous Page | Next Page>

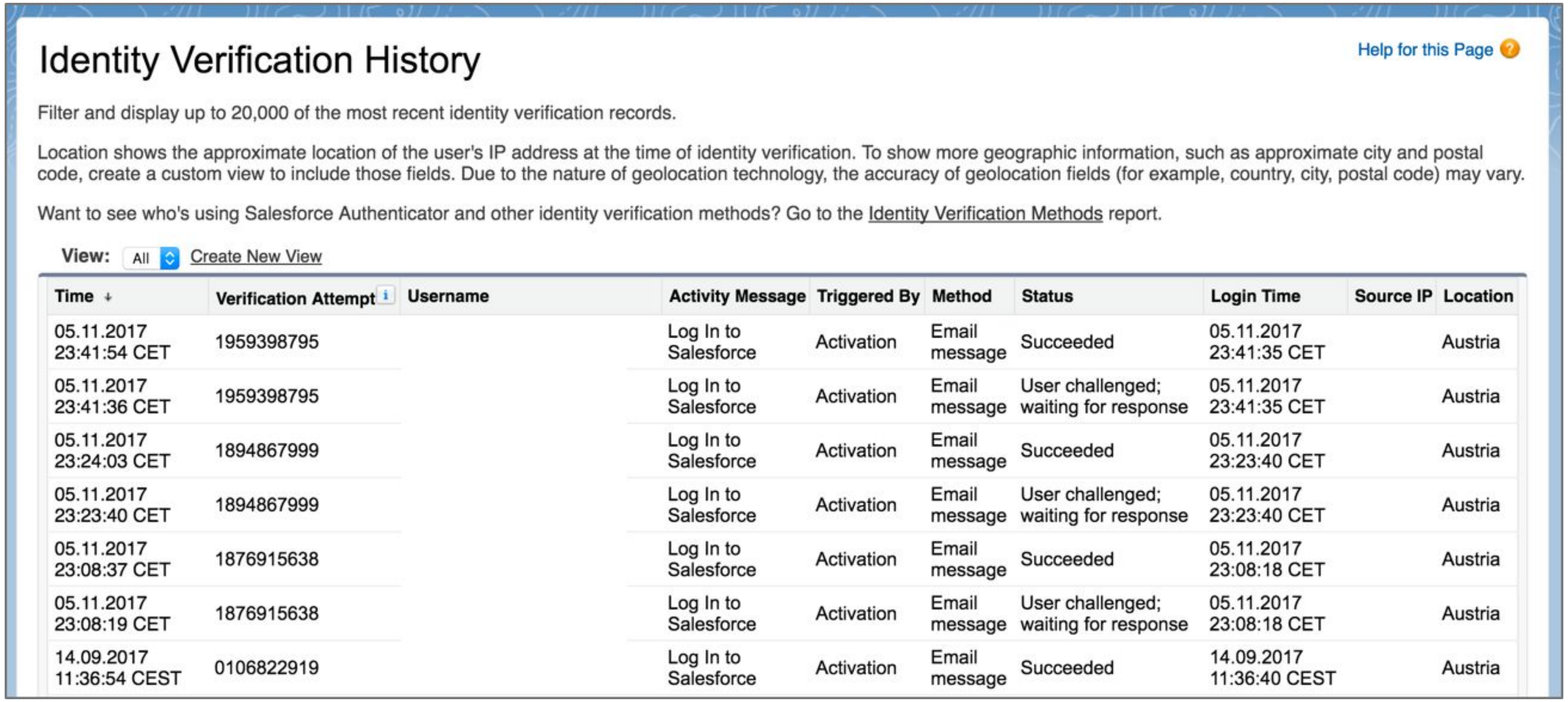
Username	Login Time	Source IP	Location	Login Type	Status	Browser	Platform	Application	Client Version	API Type	API Version	Login URL
	05.11.2017 23:41:35 CET	62.47.240.84	Austria	Remote Access Client	Failed: Computer activation required	Salesforce 14	iPhone	Browser	N/A	N/A	N/A	login.salesforce.com
	05.11.2017 23:39:44 CET	62.47.240.84	Austria	Remote Access 2.0	Success	Unknown	Unknown	Business Card Reader	N/A	N/A	N/A	login.salesforce.com
	05.11.2017 23:24:40 CET	62.47.240.84	Austria	Remote Access 2.0	Success	Unknown Webkit Mobile	iPhone	Business Card Reader	N/A	N/A	N/A	login.salesforce.com
	05.11.2017 23:24:03 CET	62.47.240.84	Austria	Remote Access Client	Success	Unknown Webkit Mobile	iPhone	Browser	N/A	N/A	N/A	login.salesforce.com
	05.11.2017 23:23:40 CET	62.47.240.84	Austria	Remote Access Client	Failed: Computer activation required	Unknown Webkit Mobile	iPhone	Browser	N/A	N/A	N/A	login.salesforce.com
	05.11.2017 23:08:40 CET	62.47.240.84	Austria	Remote Access 2.0	Success	Unknown Webkit Mobile	iPhone	ScanBizCards Business Card Reader	N/A	N/A	N/A	login.salesforce.com
	05.11.2017 23:08:37 CET	62.47.240.84	Austria	Remote Access Client	Success	Unknown Webkit Mobile	iPhone	Browser	N/A	N/A	N/A	login.salesforce.com
	05.11.2017 23:08:18 CET	62.47.240.84	Austria	Remote Access Client	Failed: Computer activation required	Unknown Webkit Mobile	iPhone	Browser	N/A	N/A	N/A	login.salesforce.com
	25.10.2017 10:53:10 CEST	193.22.85.250	Austria	Application	Success	Chrome 60	Mac OSX	Browser	N/A	N/A	N/A	login.salesforce.com
	24.10.2017 09:48:19 CEST	52.205.41.207	United States	Remote Access 2.0	Success	Unknown	Unknown	Trailhead	N/A	N/A	N/A	playful-moose-374269-dev-ed.my.salesforce.com

Identity Verification History

Setup | Identity | Identity Verification History

Monitor Verifications

- Use Identity Verification History to monitor and audit up to 20,000 records of your org users’ identity verification attempts from the past six months
- For example, suppose that two-factor authentication is enabled when a user logs in. When the user successfully provides a time-based, one-time password as proof of identity, that information is recorded in Identity Verification History



Identity Verification History

Help for this Page

Filter and display up to 20,000 of the most recent identity verification records.

Location shows the approximate location of the user's IP address at the time of identity verification. To show more geographic information, such as approximate city and postal code, create a custom view to include those fields. Due to the nature of geolocation technology, the accuracy of geolocation fields (for example, country, city, postal code) may vary.

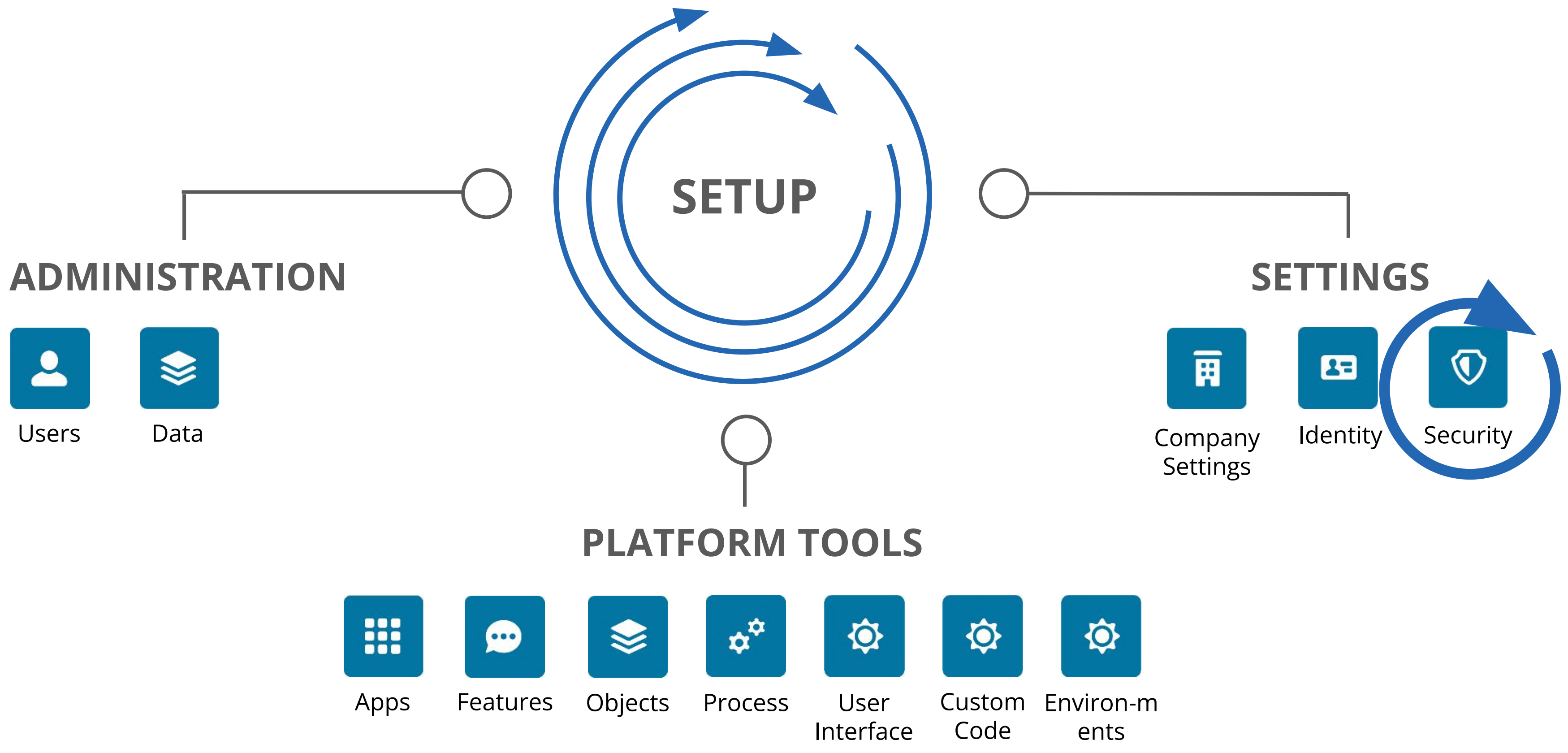
Want to see who's using Salesforce Authenticator and other identity verification methods? Go to the Identity Verification Methods report.

View: All Create New View

Time	Verification Attempt	Username	Activity Message	Triggered By	Method	Status	Login Time	Source IP	Location
05.11.2017 23:41:54 CET	1959398795		Log In to Salesforce	Activation	Email message	Succeeded	05.11.2017 23:41:35 CET		Austria
05.11.2017 23:41:36 CET	1959398795		Log In to Salesforce	Activation	Email message	User challenged; waiting for response	05.11.2017 23:41:35 CET		Austria
05.11.2017 23:24:03 CET	1894867999		Log In to Salesforce	Activation	Email message	Succeeded	05.11.2017 23:23:40 CET		Austria
05.11.2017 23:23:40 CET	1894867999		Log In to Salesforce	Activation	Email message	User challenged; waiting for response	05.11.2017 23:23:40 CET		Austria
05.11.2017 23:08:37 CET	1876915638		Log In to Salesforce	Activation	Email message	Succeeded	05.11.2017 23:08:18 CET		Austria
05.11.2017 23:08:19 CET	1876915638		Log In to Salesforce	Activation	Email message	User challenged; waiting for response	05.11.2017 23:08:18 CET		Austria
14.09.2017 11:36:54 CEST	0106822919		Log In to Salesforce	Activation	Email message	Succeeded	14.09.2017 11:36:40 CEST		Austria

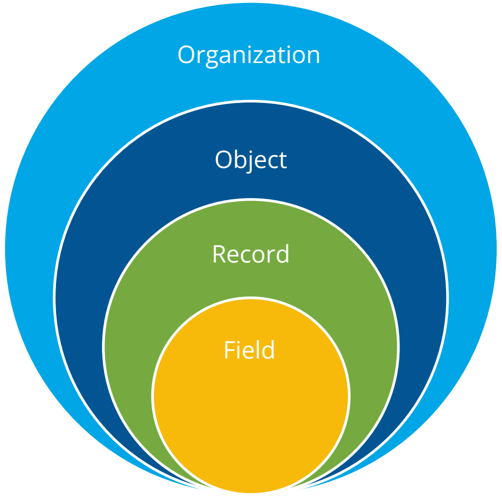
Setup

Overview



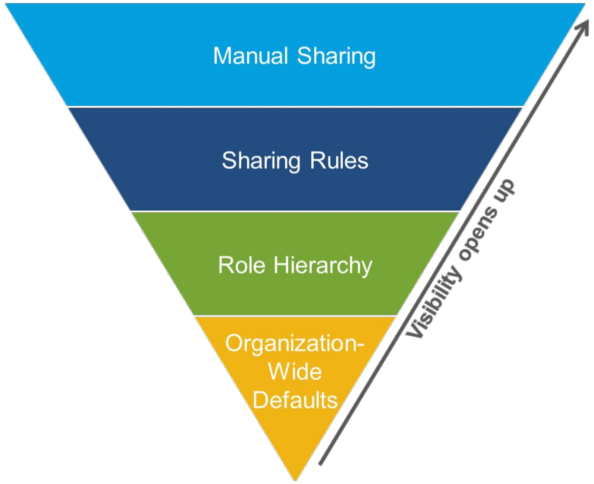
Levels of Data Access

Overview



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

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



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

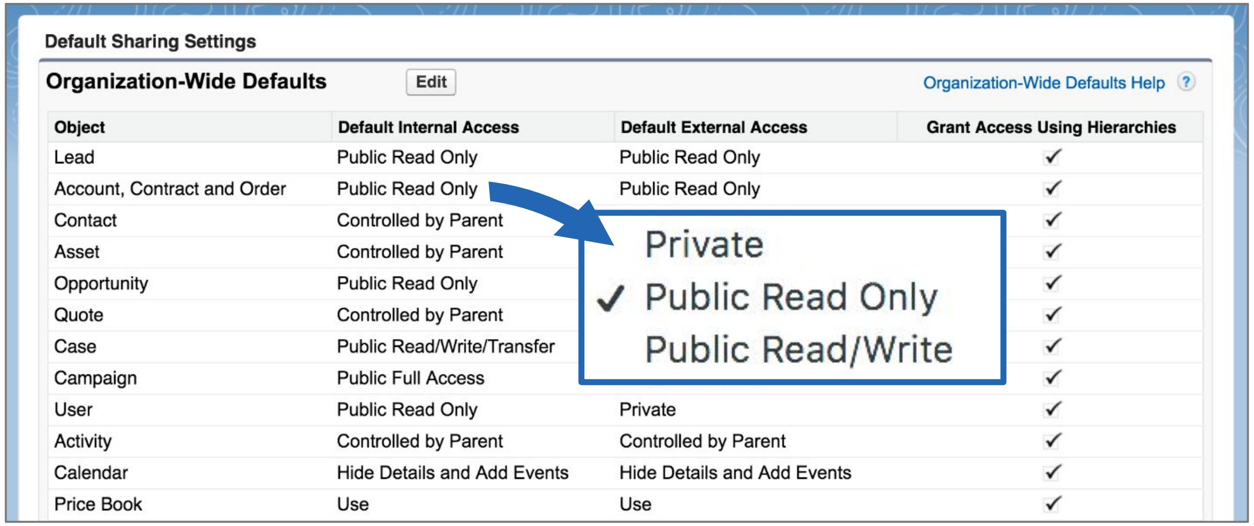
Organization-Wide Defaults

Setup | Security | Sharing Settings

OWDs

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

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



Default Sharing Settings

Organization-Wide Defaults [Edit] Organization-Wide Defaults Help

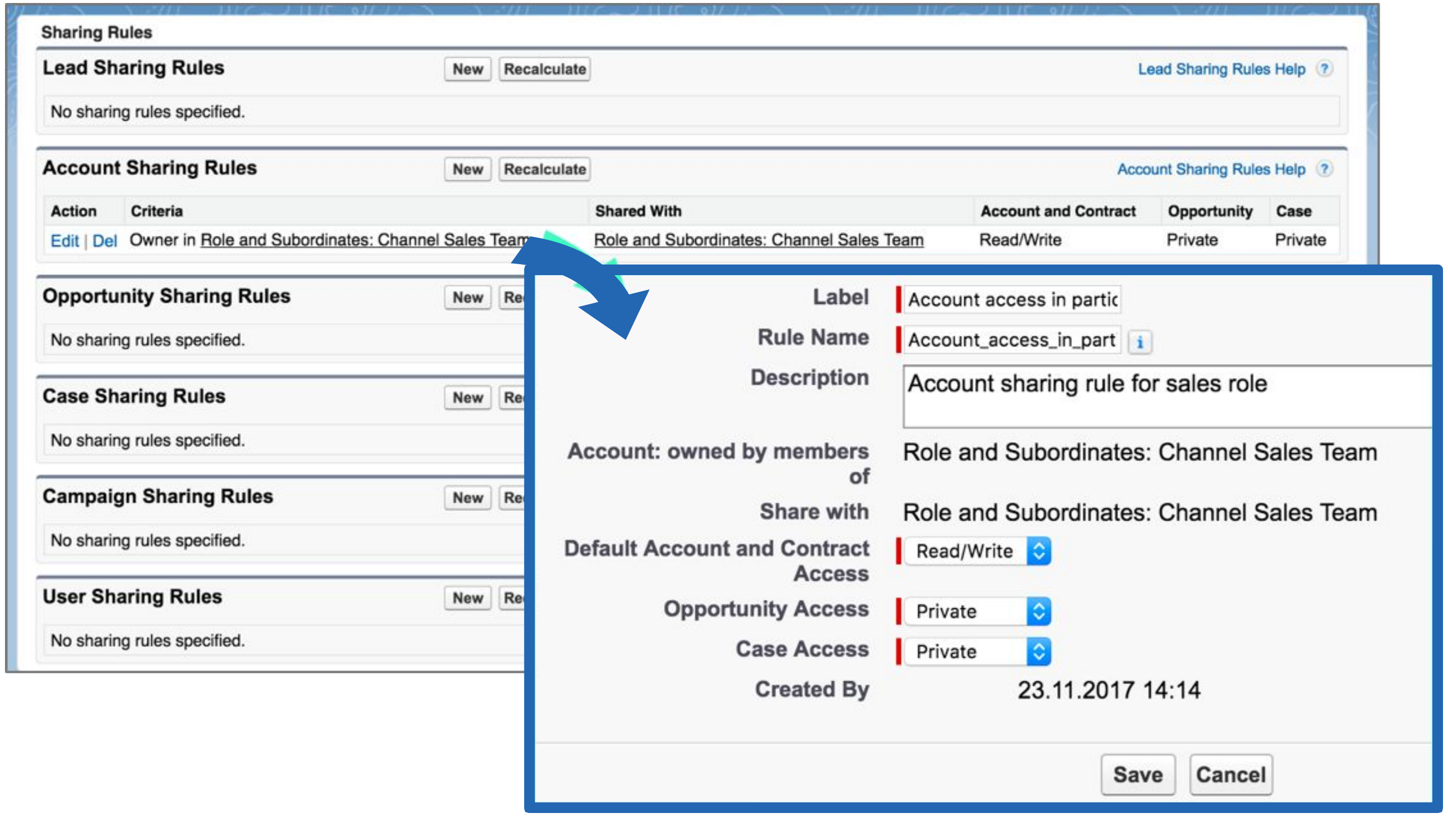
Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read Only	Public Read Only	✓
Account, Contract and Order	Public Read Only	Public Read Only	✓
Contact	Controlled by Parent		✓
Asset	Controlled by Parent		✓
Opportunity	Public Read Only		✓
Quote	Controlled by Parent		✓
Case	Public Read/Write/Transfer		✓
Campaign	Public Full Access		✓
User	Public Read Only	Private	✓
Activity	Controlled by Parent	Controlled by Parent	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓

Sharing Rules

Setup | Security | Sharing Settings

Sharing Rules

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

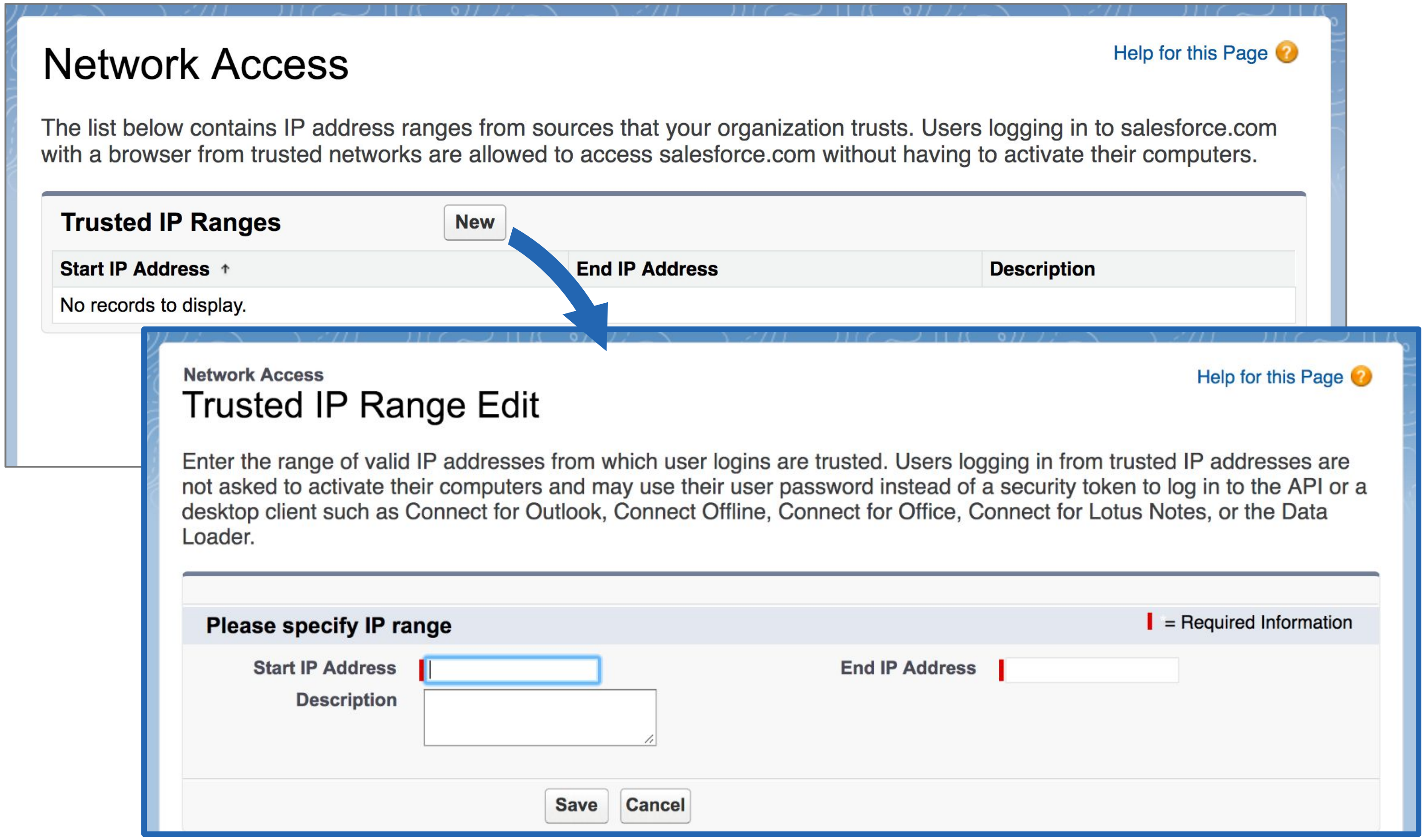


Network Access

Setup | Security | Network Access

Trusted IP Ranges

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

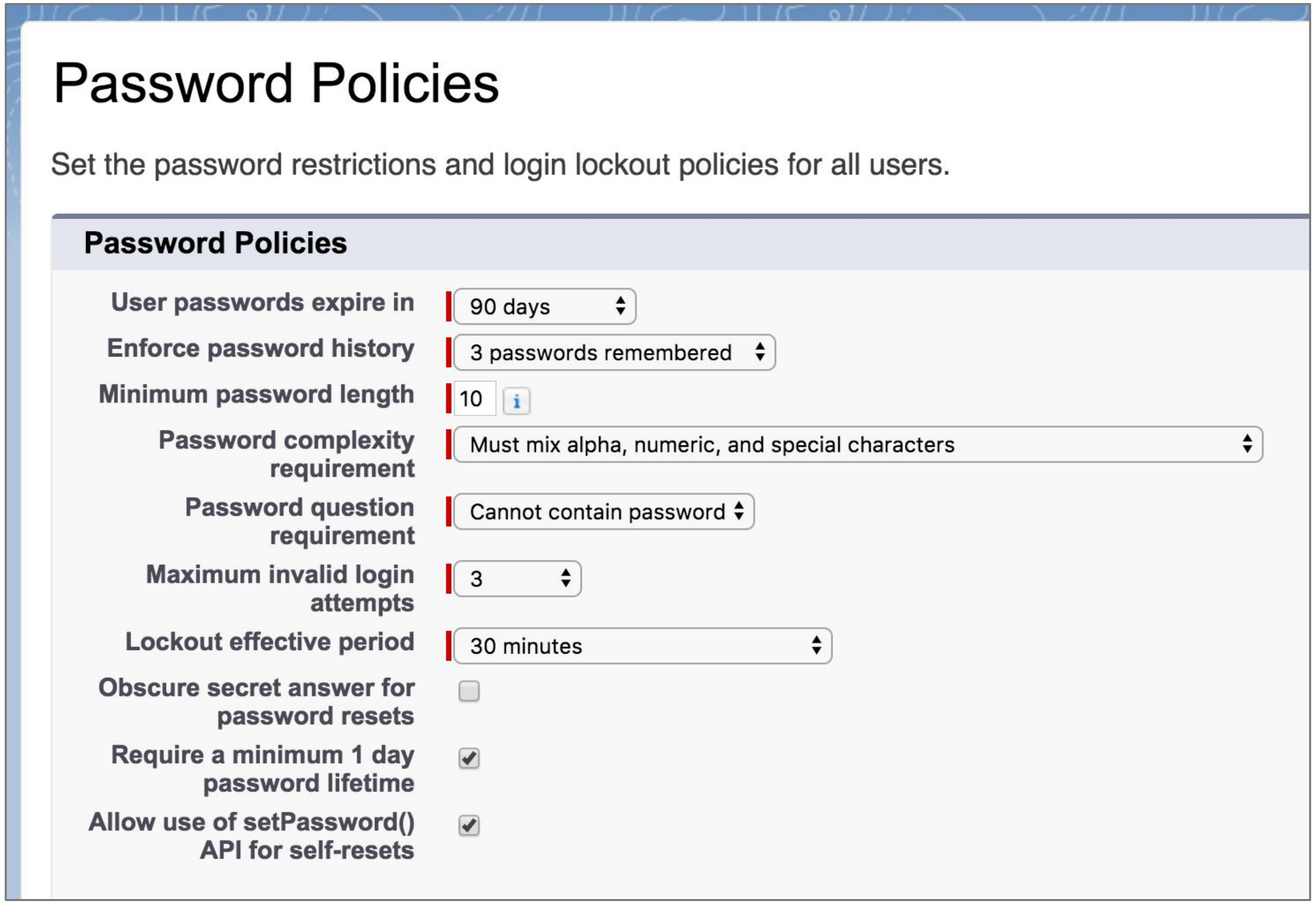


Password Policies

Setup | Security | Password Policies

Set Passwords Policies

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



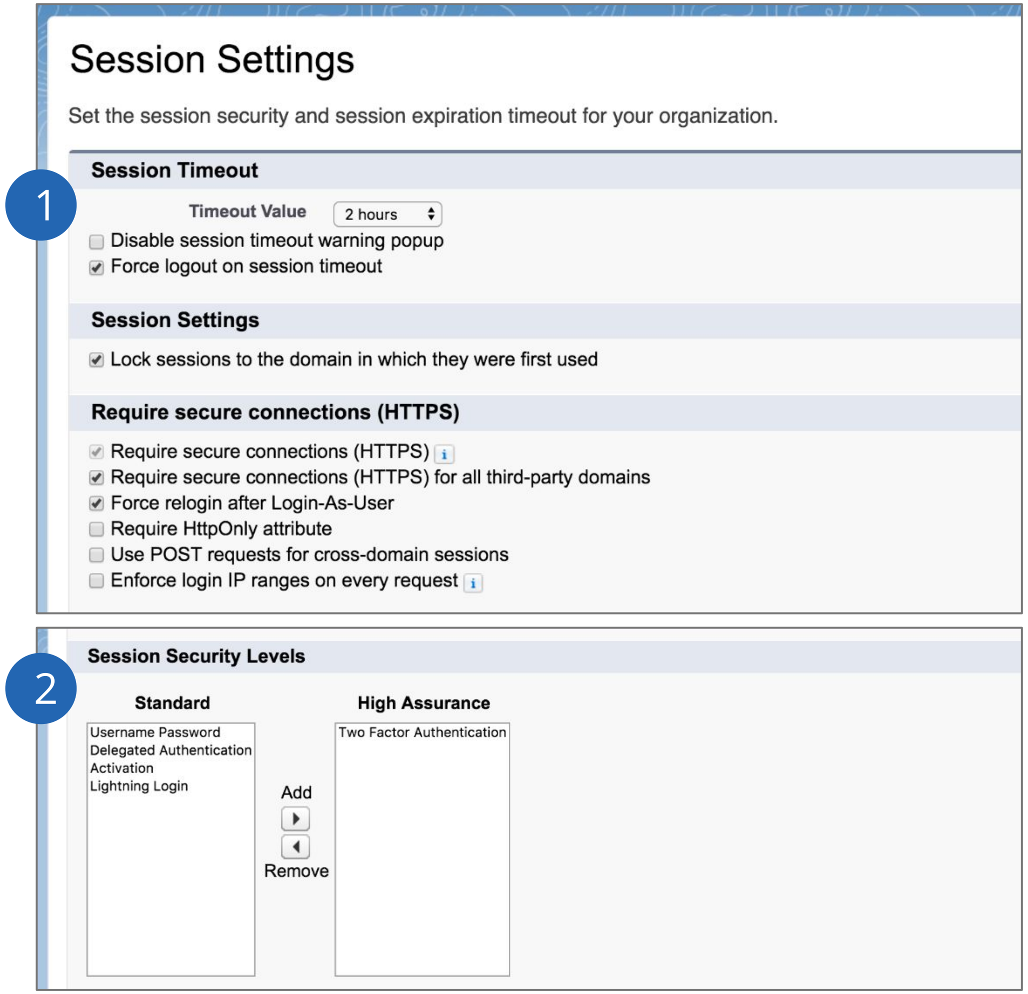
Session Settings

Setup | Security | Session Settings

Session Security

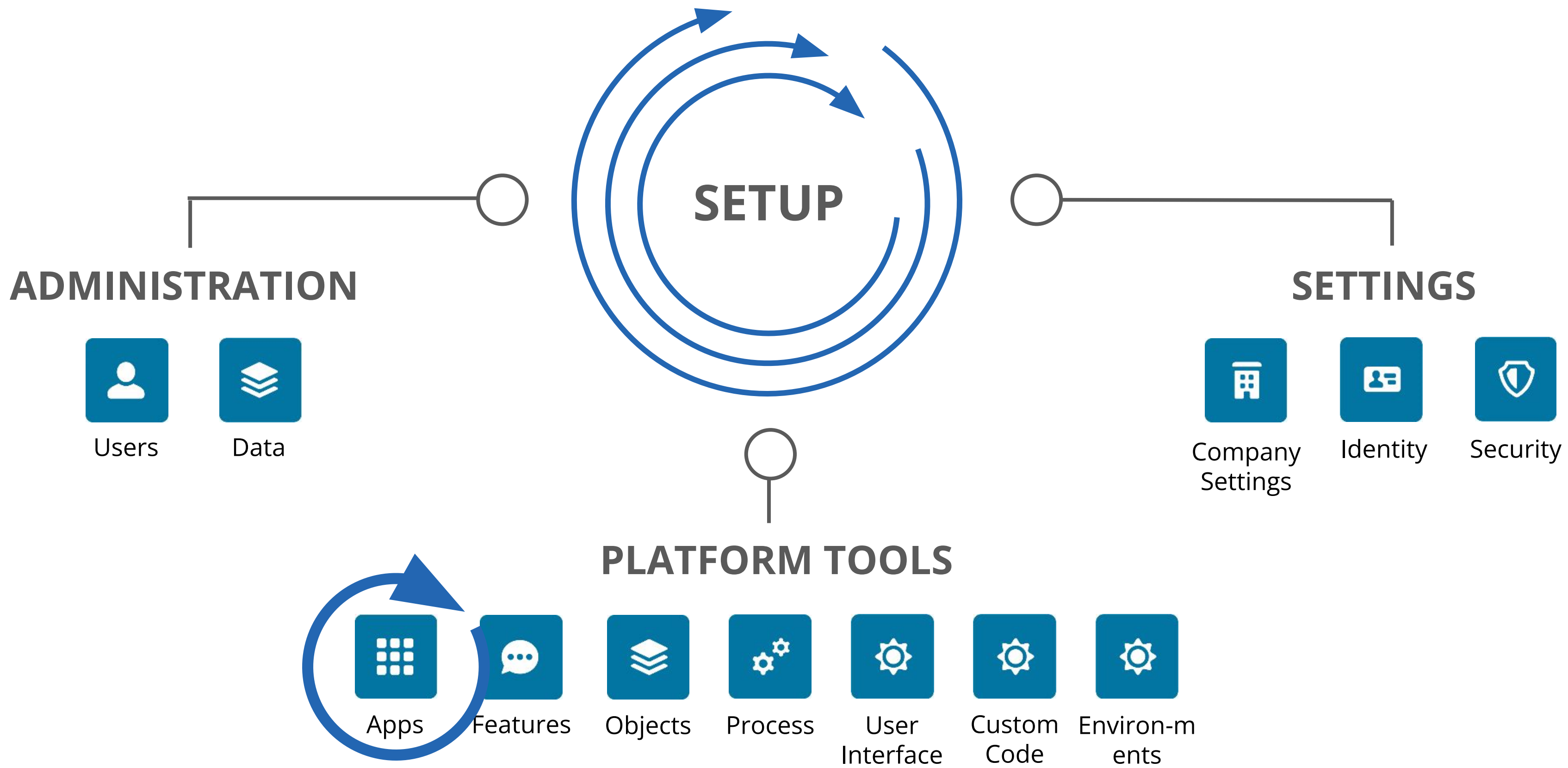
Session Settings let admins modify session security settings to specify session connection type, timeout settings, and IP address ranges to protect against malicious attacks and more

1. With Session Timeout, you can set the length of time after which the system logs out inactive users. Select a value between 15 minutes and 24 hours. Choose a shorter timeout period if your org has sensitive information and you want to enforce stricter security
2. Set Session Security Levels to restrict access to certain types of resources based on the level of security associated with the authentication (login) method for the user’s current session. By default, each login method has one of two security levels: Standard or High Assurance. You can change the session security level and define policies so specified resources are only available to users with a High Assurance level



Setup

Overview

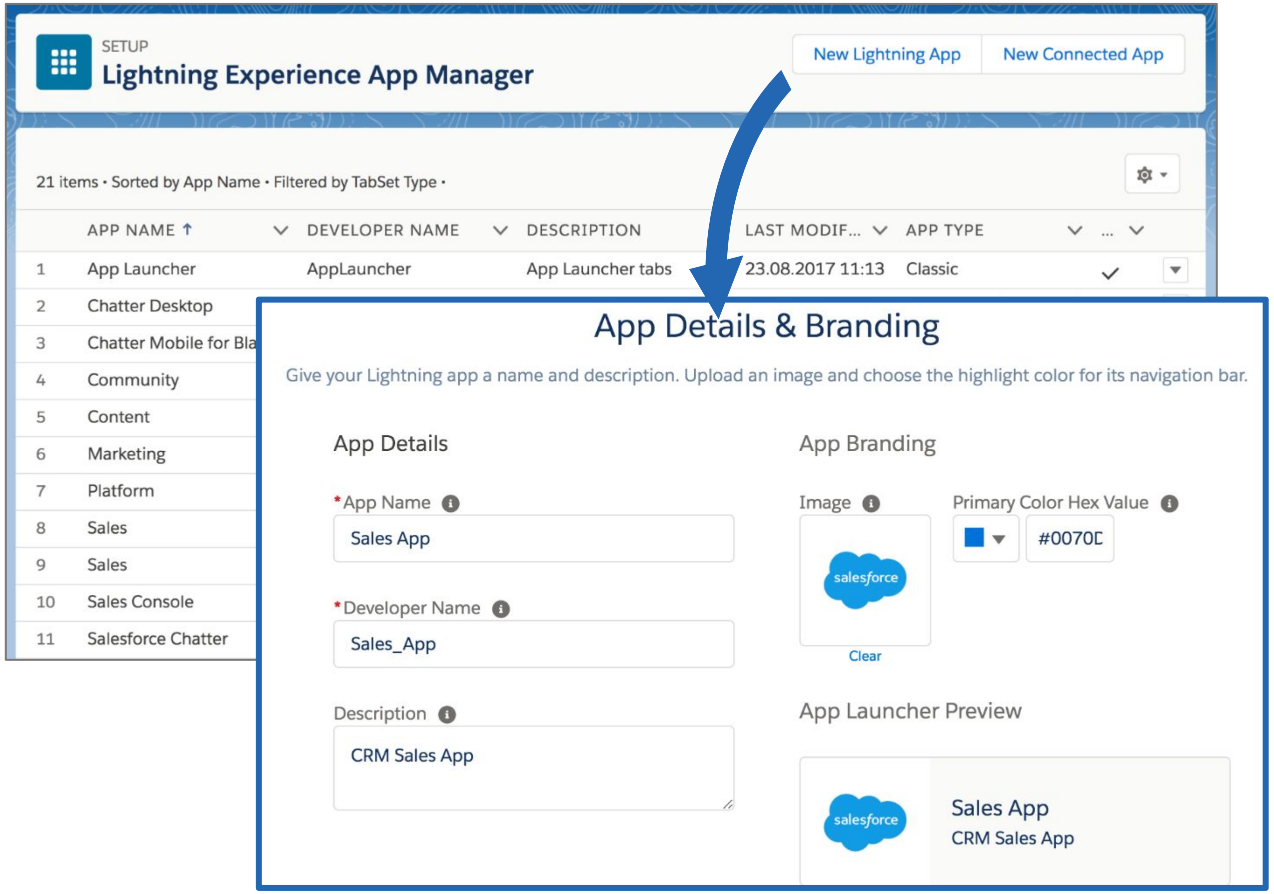


App Manager

Setup | Apps | App Manager

Manage your Apps

- The App Manager shows you all your apps in one place. You can make changes to them or create new ones. To create a new one, click the button New Lightning App. You will asked to define your app step by step:
    1. Give your app a name and description. Upload an image and choose the highlight color for its navigation bar
    2. Choose standard navigation or console navigation for your app
    3. Give your users quick access to common productivity tools by adding Utility Bar Items
    4. Choose the items to include in the app. You can rearrange the order in which items appear
    5. Choose the user profiles that can access this app

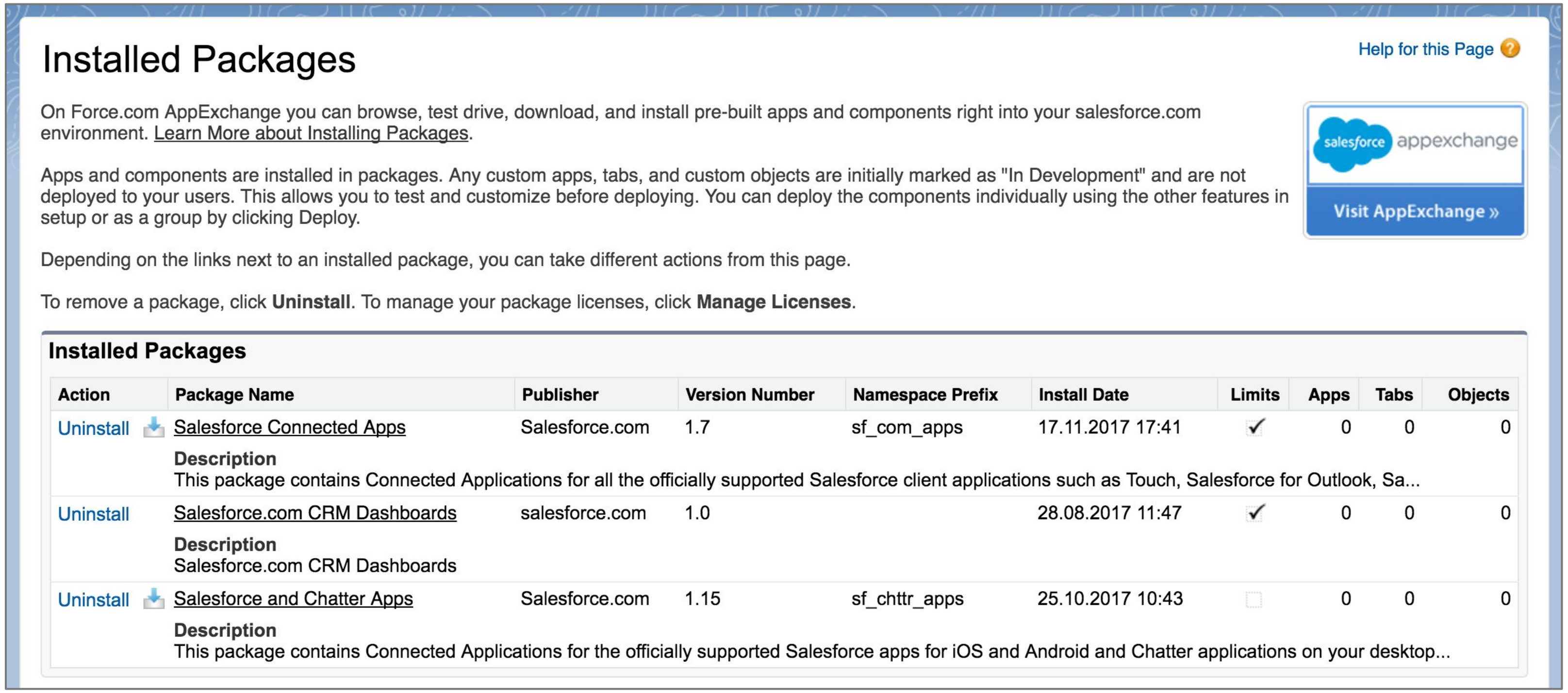


Installed Packages

Setup | Apps | Installed Packages

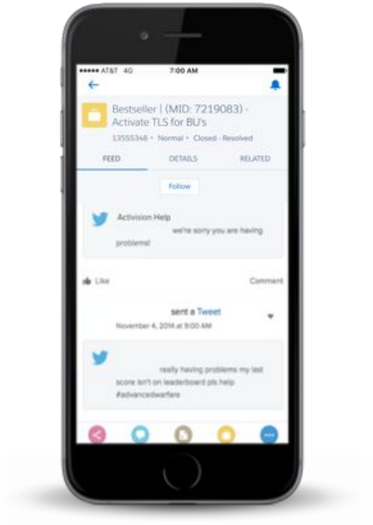
Packages

- Installed Packages lists all Apps and components installed from AppExchange. View and manage these packages installed in your Salesforce org, including assigning licenses to users, uninstalling packages and exporting package data
- View key details about a package, such as the number of custom apps, tabs, and objects it uses



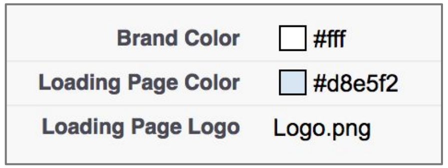
Salesforce Mobile App

Setup | Apps | Mobile Apps | Salesforce



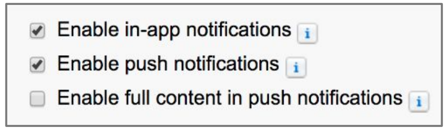
Branding

Customize the appearance of the mobile app so it matches your company's branding



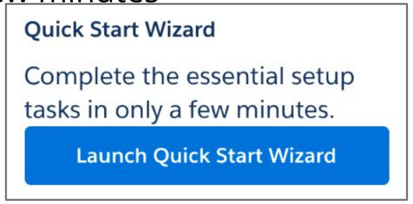
Notification

Allow users to receive notifications in the mobile app



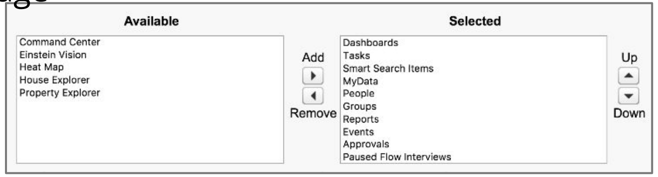
Mobile Quick Start

The Salesforce Mobile Wizard provides an easy way to complete the essential setup tasks in only a few minutes



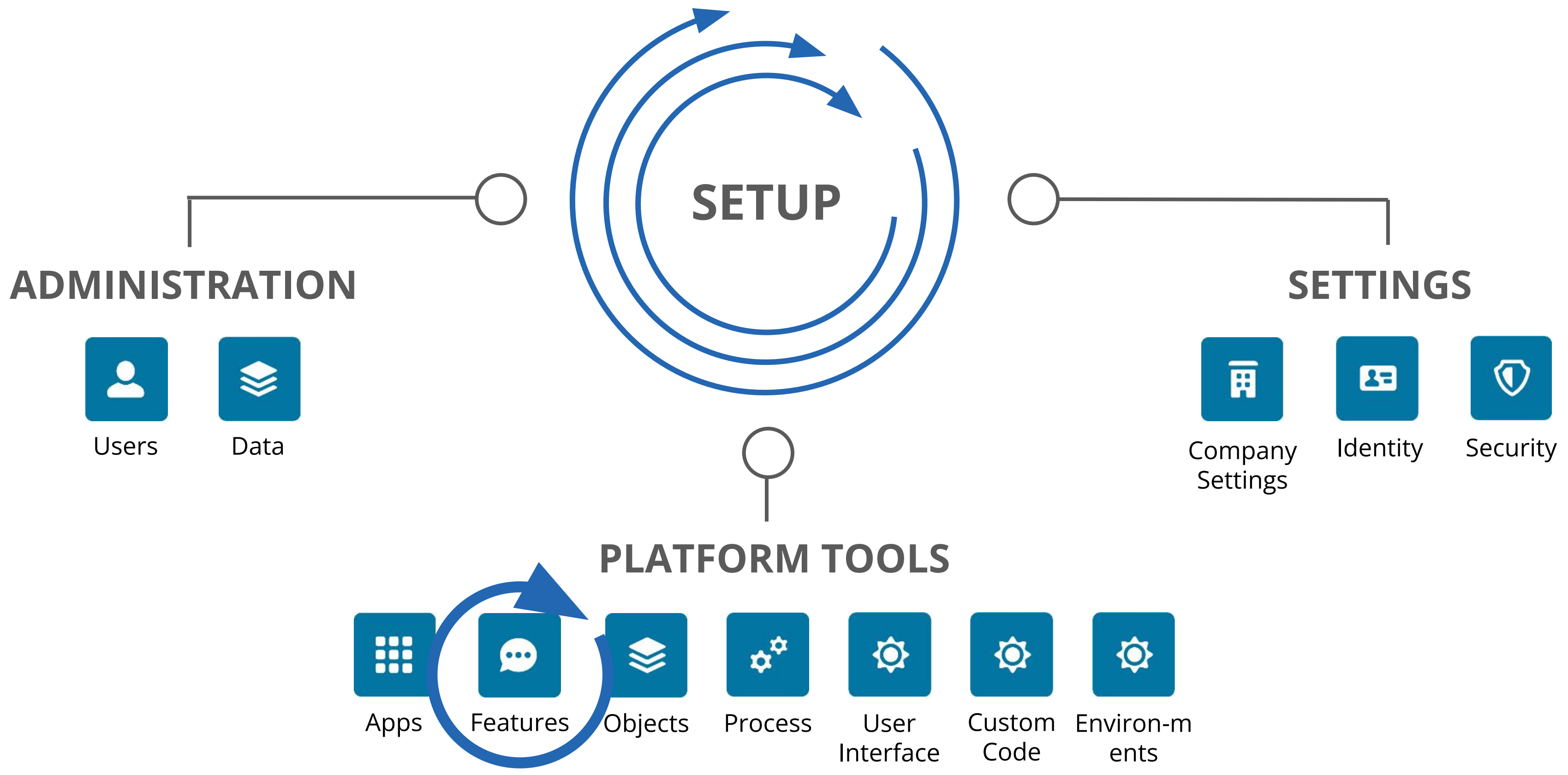
Navigation

Organizing the menu items in your app. Put the items that users will want most at the top. The first item becomes the landing page



Setup

Overview



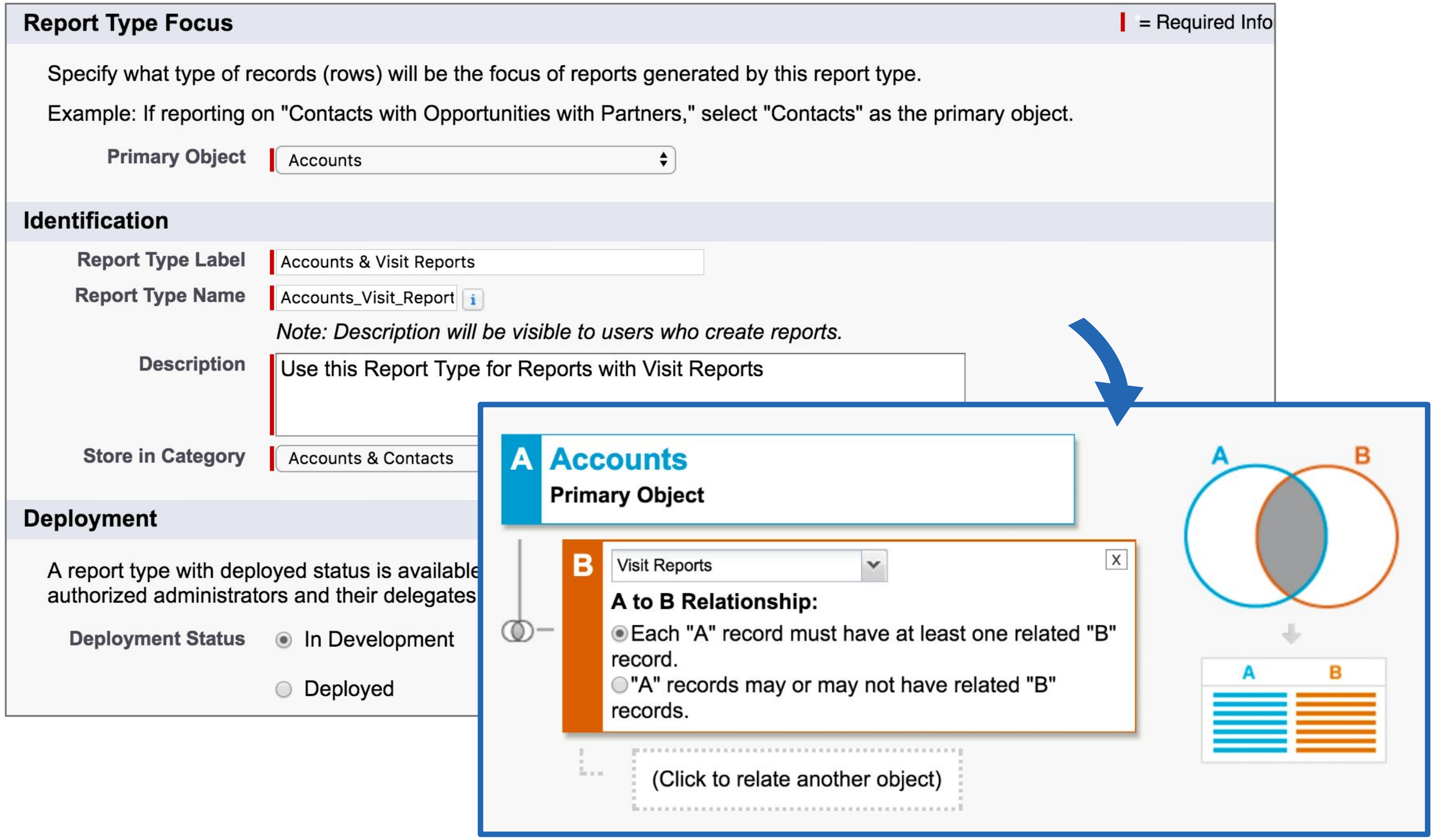
Custom Report Types

Setup | Feature Settings | Analytics | Reports & Dashboards | Report Types

Create Custom Report Types

Custom report types allow you to build a framework in the report wizard, from which users can create and customize reports. You build custom report types off of the relationships (master-detail and lookup) between object so that you can:

1. Choose which objects to display to users creating and customizing reports
2. Define the relationships between objects displayed to users creating and customizing reports
3. Select which objects' fields can be used as columns in reports

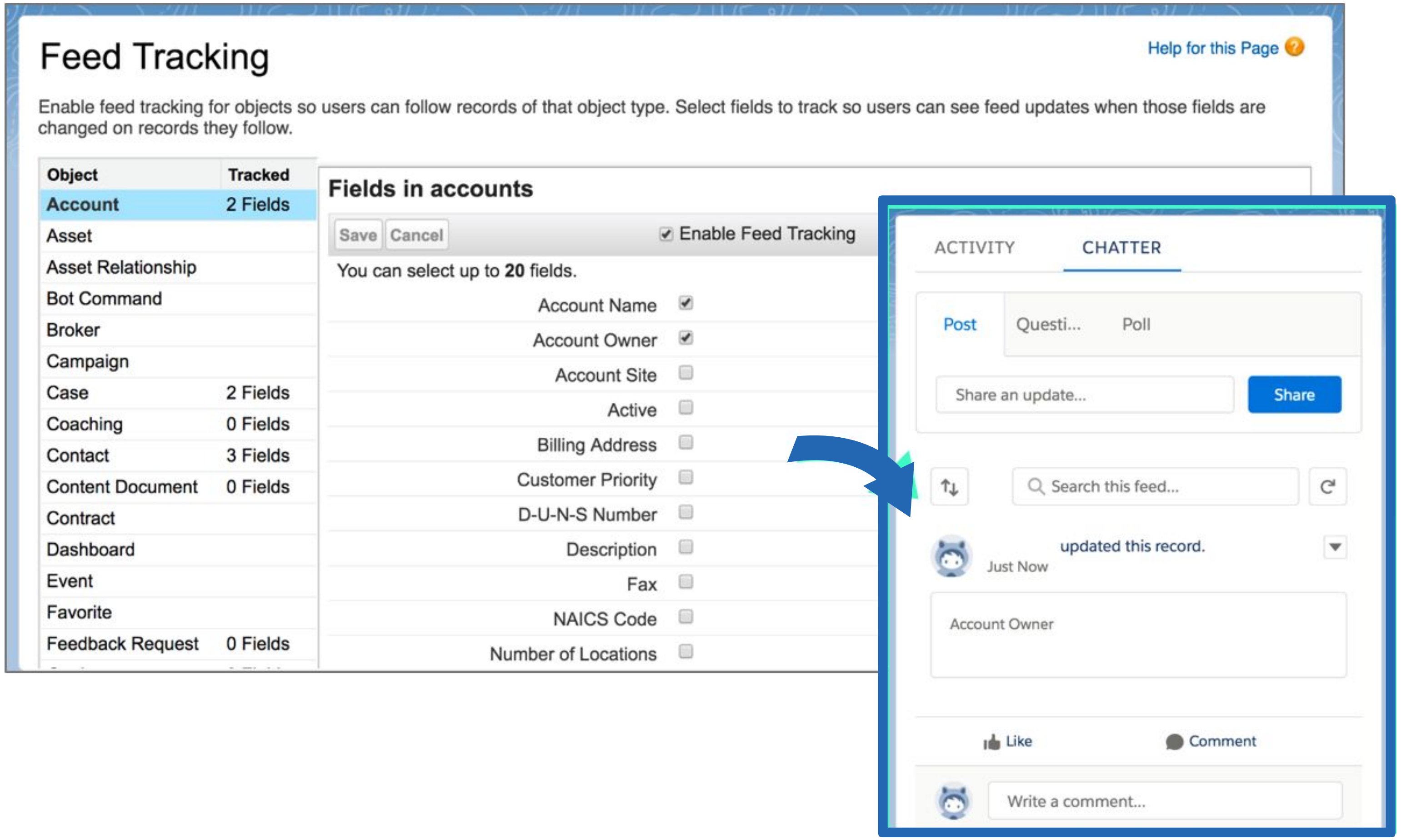


Feed Tracking

Setup | Feature Settings | Chatter | Feed Tracking

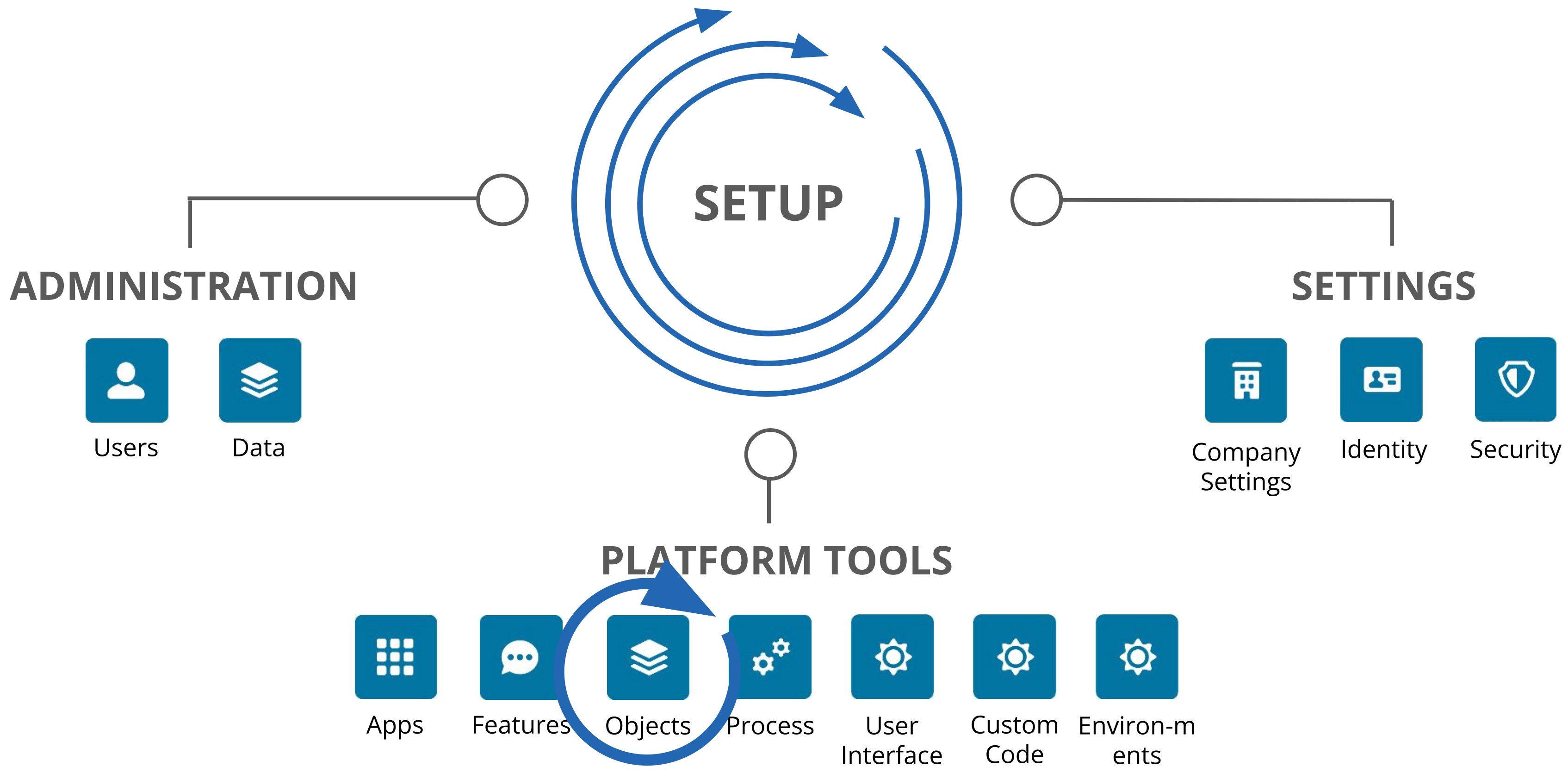
Chatter Feed

- Enable feed tracking for objects and records, so users see updates for the objects and records they follow in their Chatter feed
- Many objects and fields are tracked by default, but you can further customize feed tracking to include or exclude specific objects and fields
- You can configure feed tracking for users, Chatter groups, topics, external objects and standard & custom objects



Setup

Overview



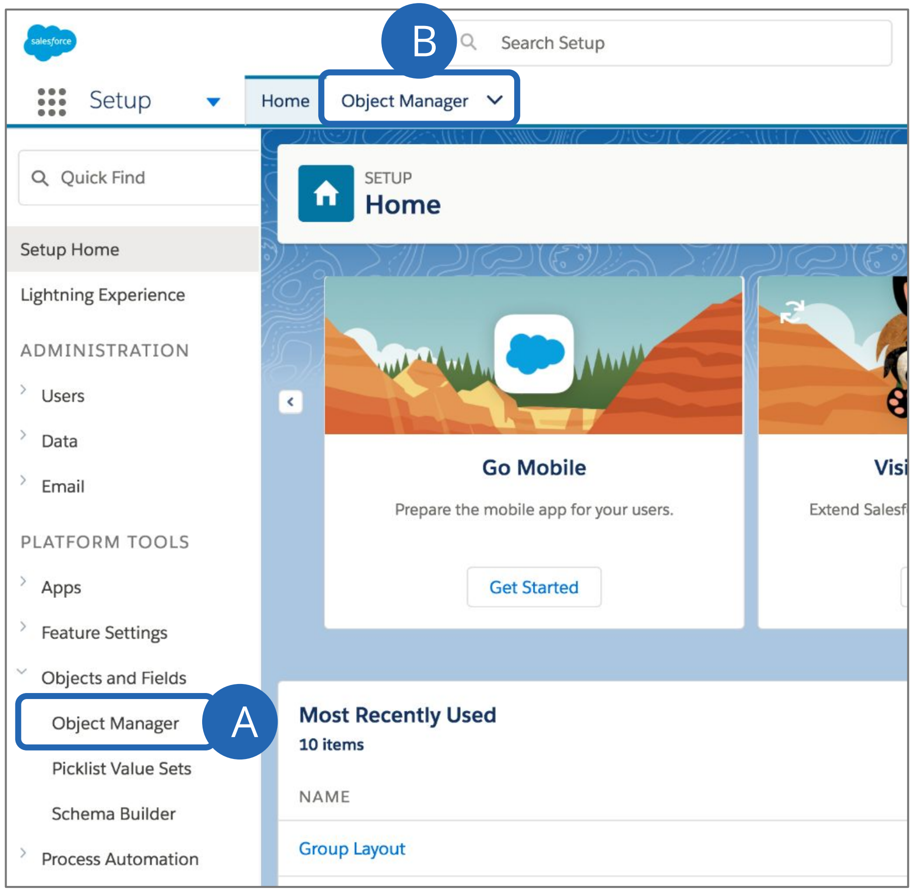
Object Manager

Setup | Objects and Fields | Object Manager

Access Object Manager

A. Access the object manager by clicking the menu item Object Manager in the setup tree

B. You can also always simply access the object manager by clicking on the tab Object Manager on the top of your setup page. There you can always change between the normal setup settings in Home, and the object manager in Object Manager



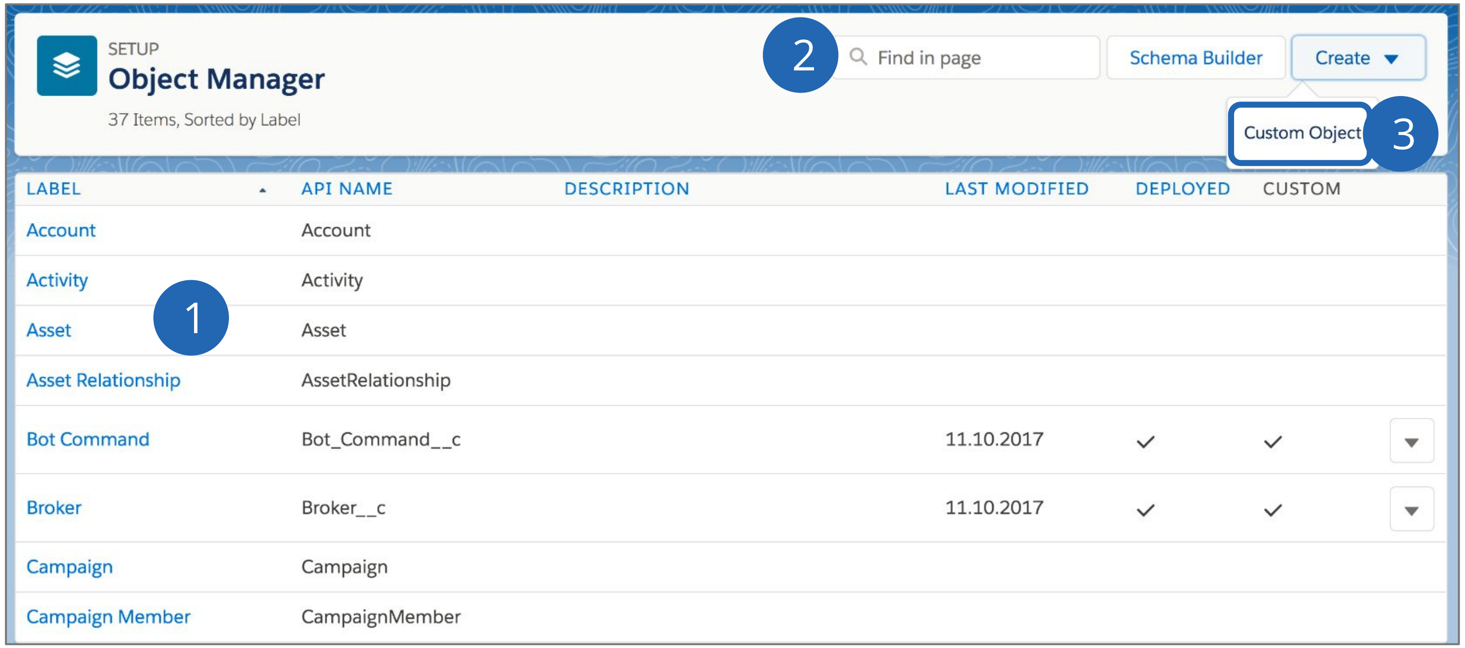
Object Manager

Setup | Objects and Fields | Object Manager

Overview

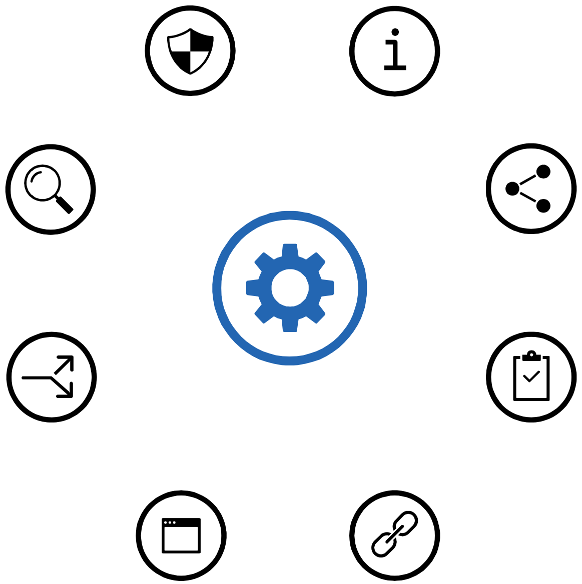
The Object Manager is a tool that lets admins customize standard objects as well as custom objects. Object management settings include customizations for fields, page layouts, compact layouts, record types and validation rules

1. See all your standard and custom objects alphabetically in one list
2. Search for a particular object if needed
3. Create a new custom object



Object Customization

Overview



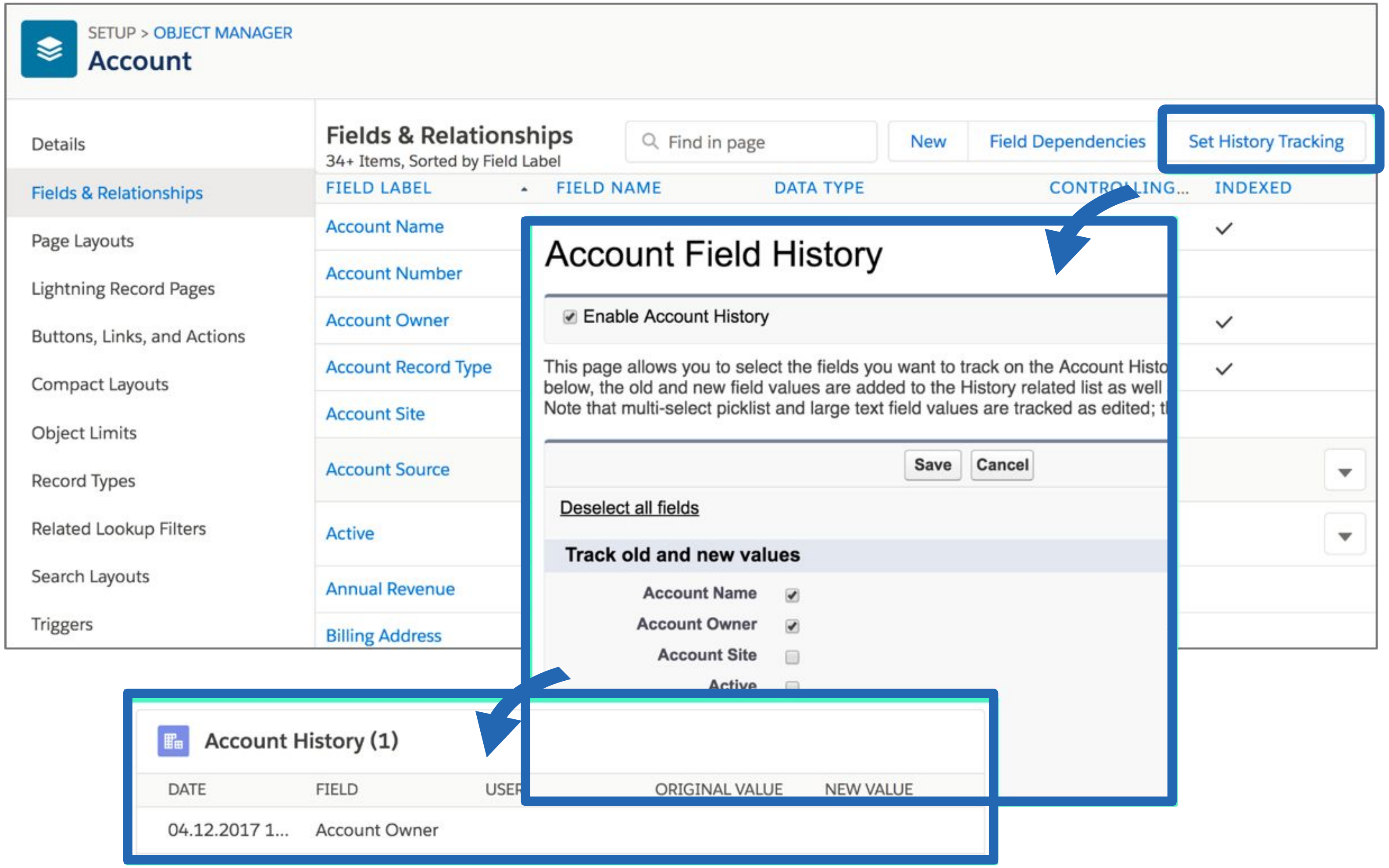
Details	Description, Label, API Name, Allow Reports, Edit and Delete (Custom Object)
Fields & Relationships	Create new fields, add field dependencies, set history tracking, click on a particular field to set field-level security
Page Layouts	Create new page layouts, rearrange fields on layout, add fields,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

Field History Tracking

Setup | Objects and Fields | Object Manager

Set Field History

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

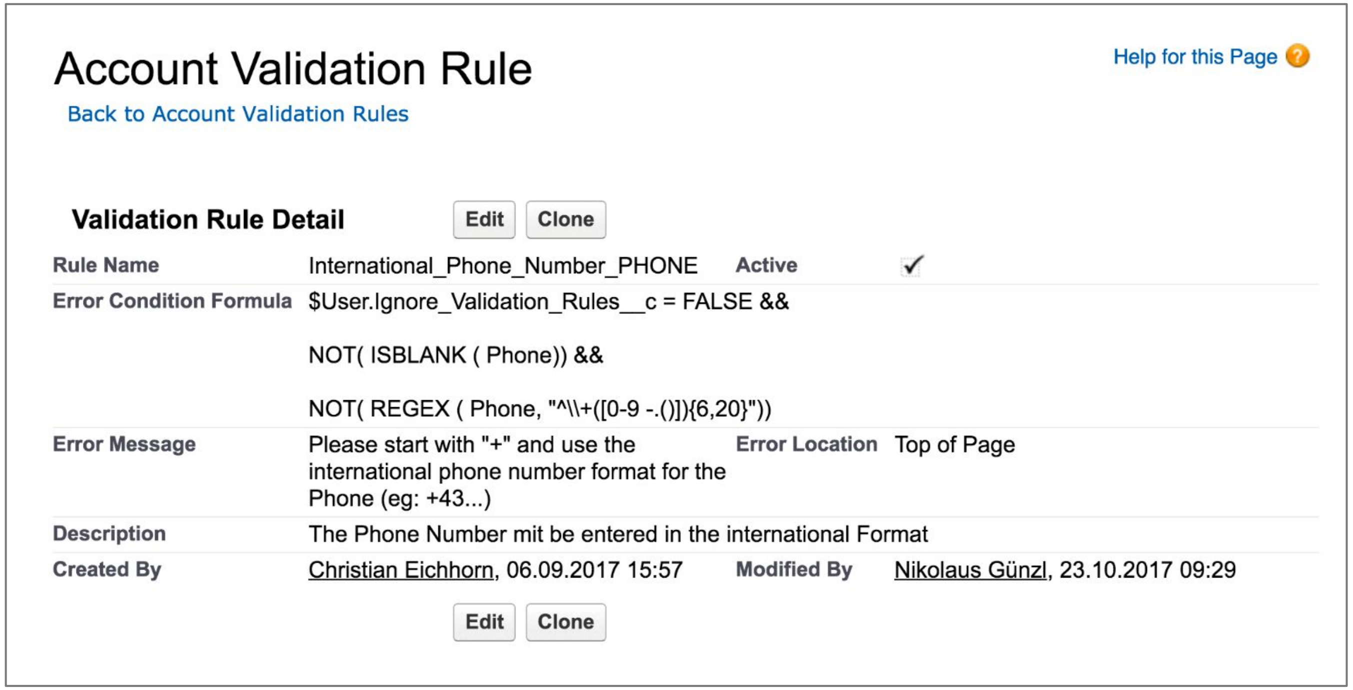


Validation Rules

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

Validation Rules

- Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record
- A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of “True” or “False”
- Do not forget to set the validation rule to active

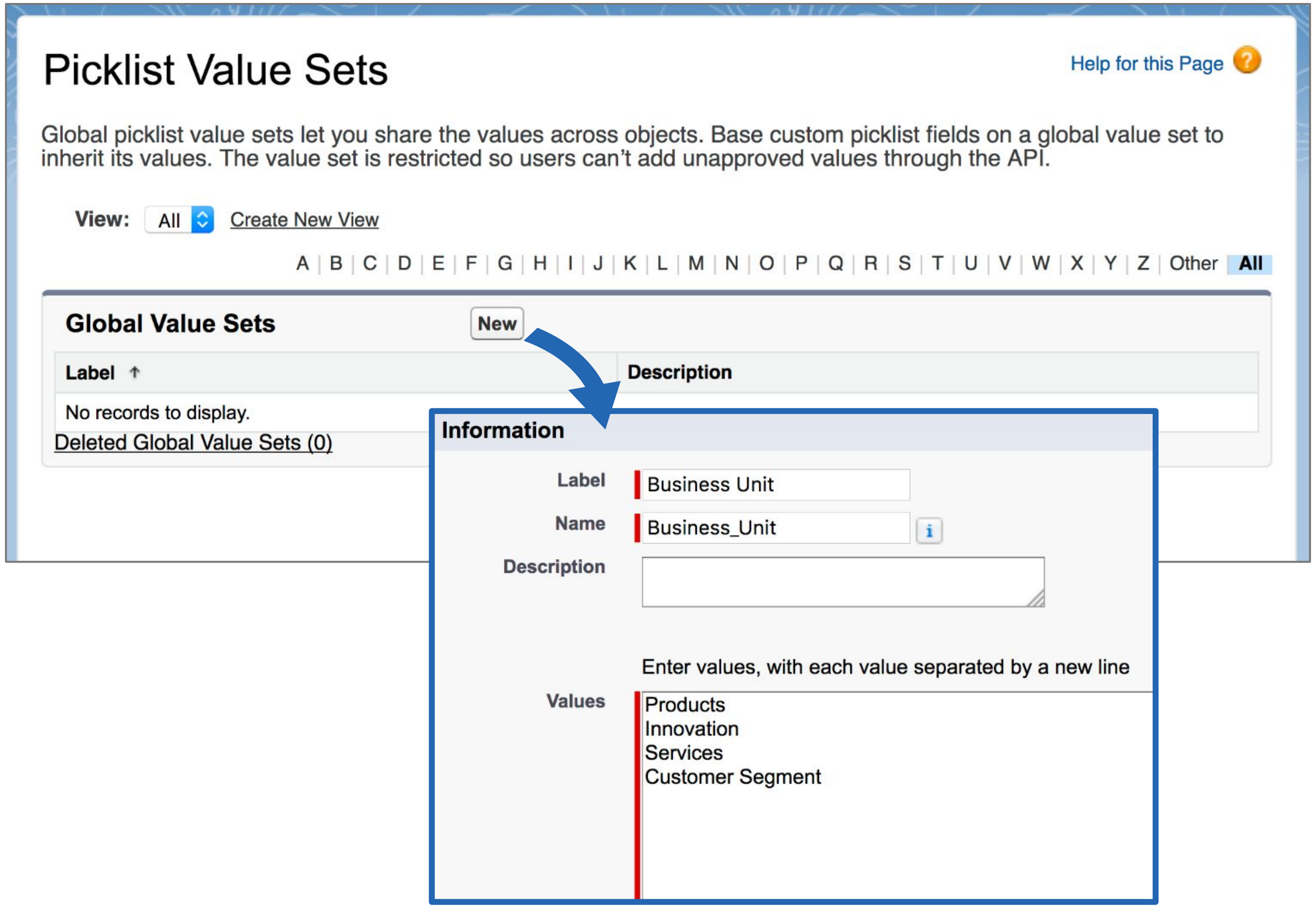


Picklist Value Sets

Setup | Objects and Fields | Picklist Value Sets

Global Picklists

- Use global picklist value sets to share values across objects and custom picklist fields, and to restrict the picklists to only the values that you specify
- A custom picklist is tied to a particular object as a field on the object. Unlike a custom picklist field, a global picklist exists independently as a global picklist value set. Its values are shared with any picklist that's based on it



Schema Builder

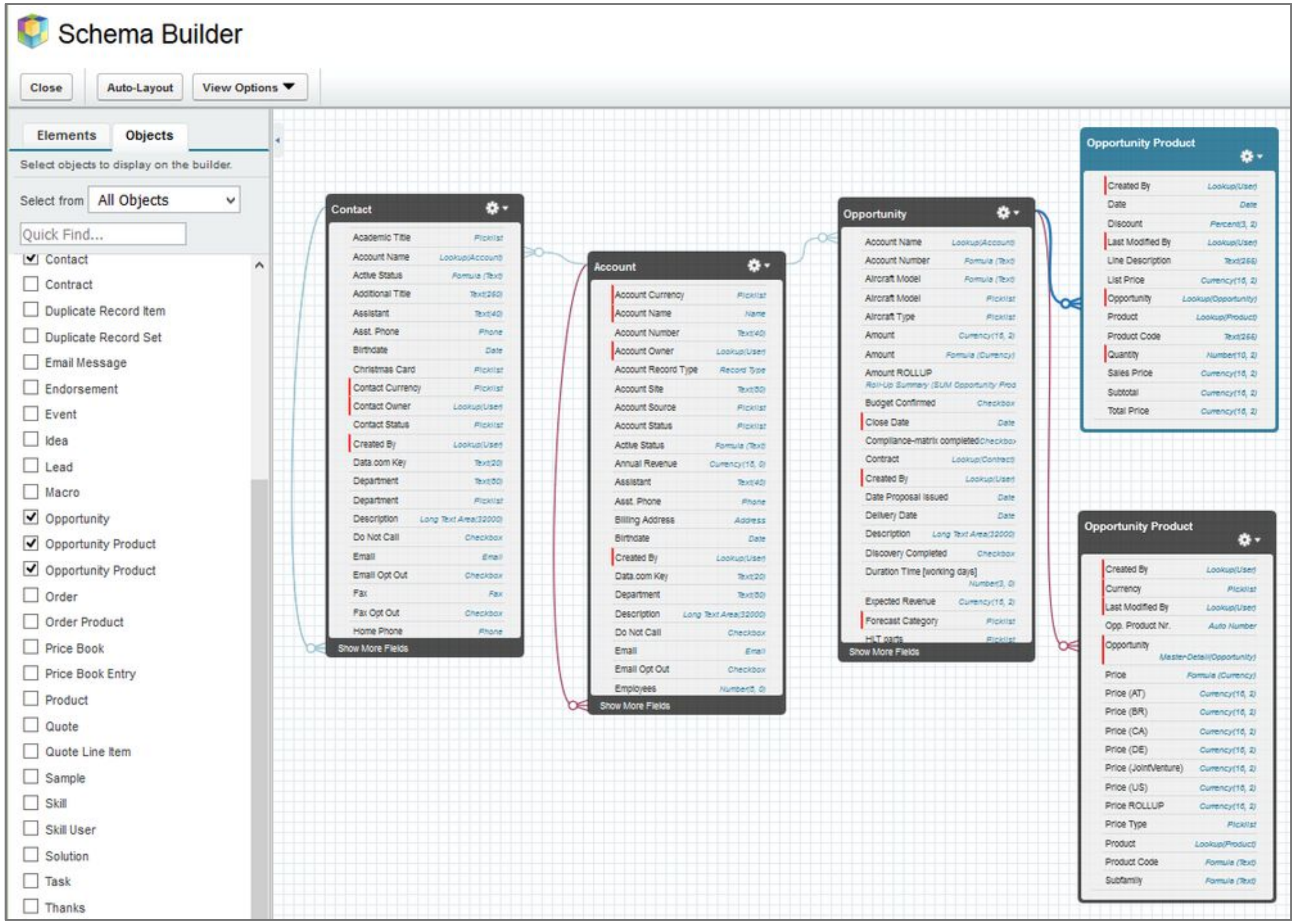
Setup | Objects and Fields | Schema Builder

Viewing objects and relationships

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

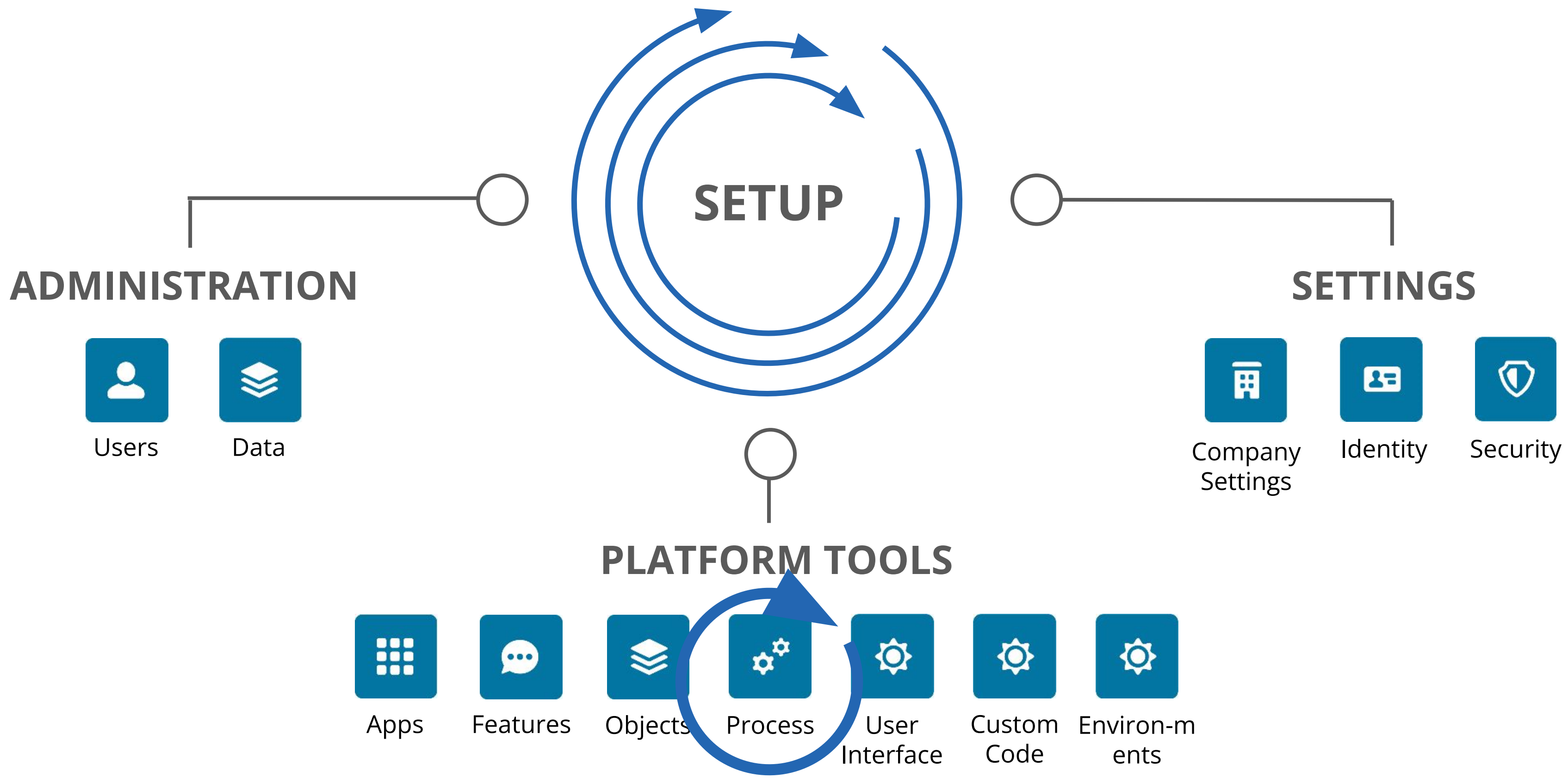
Schema Builder lets you add the following to your schema:

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



Setup

Overview

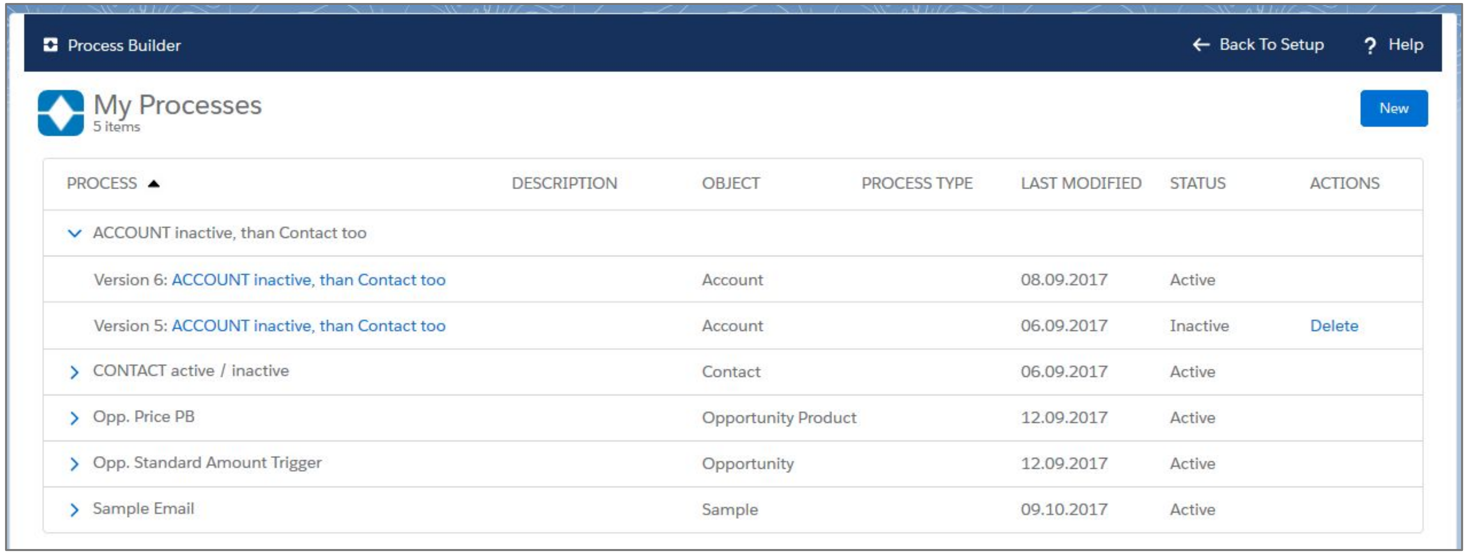


Process Builder

Setup | Process Automation | Process Builder

Processes

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

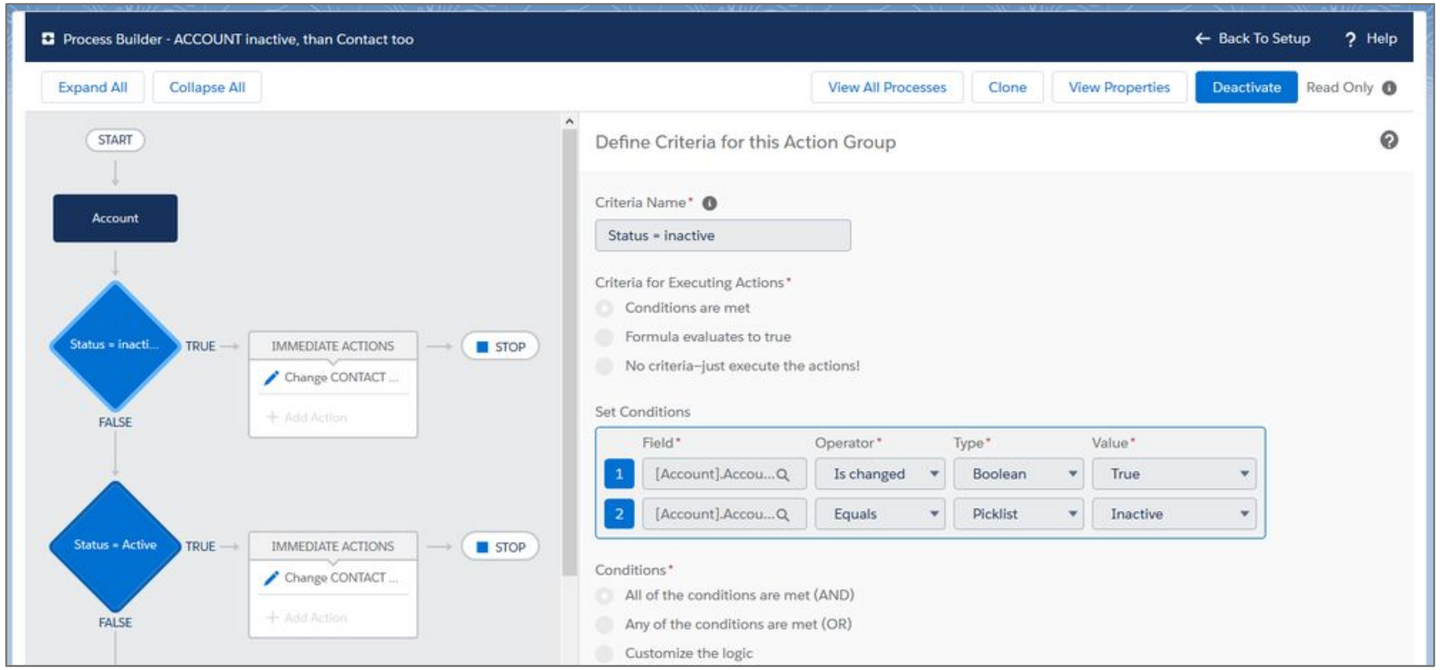


Process Builder

Setup | Process Automation | Process Builder

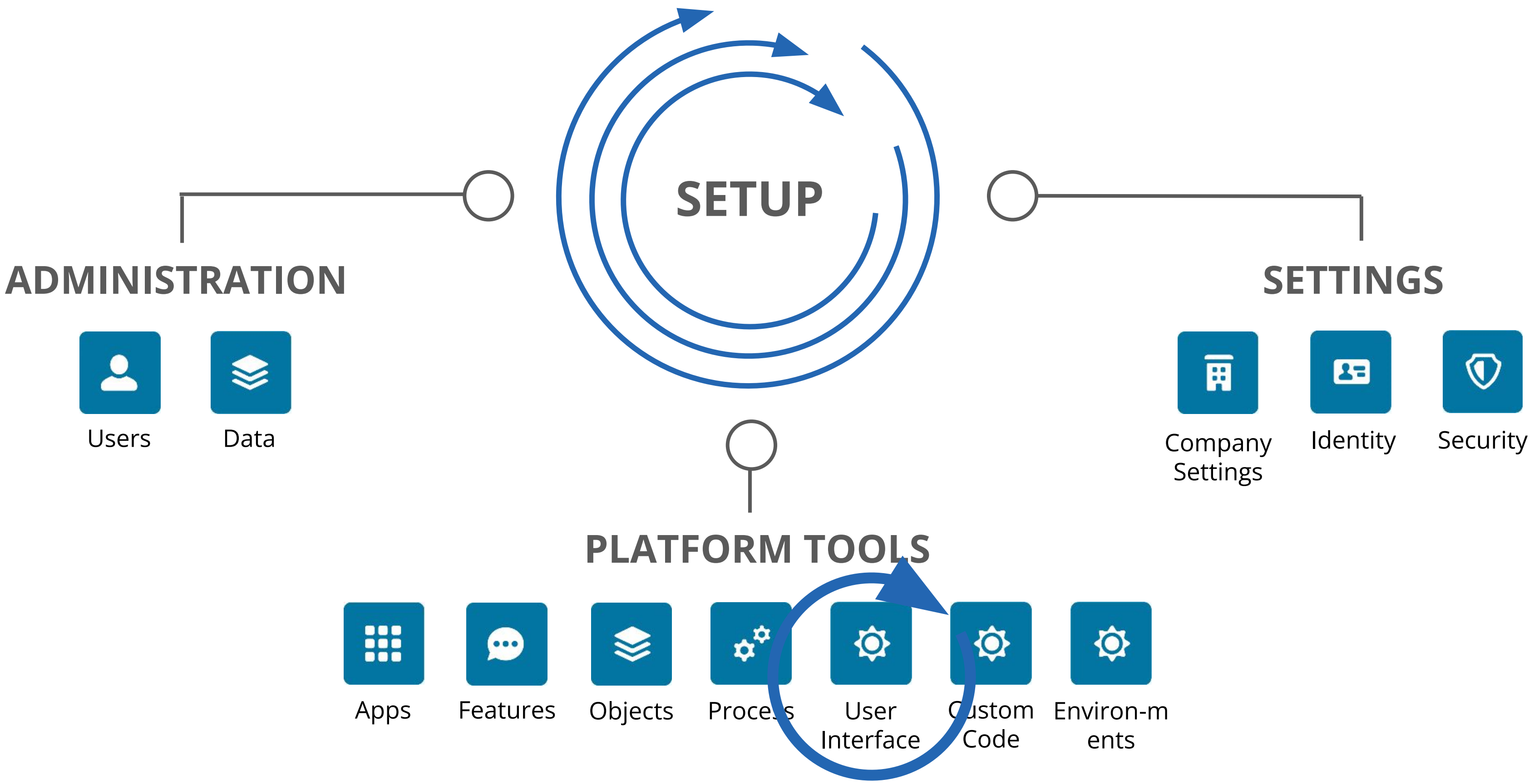
Building a Process

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



Setup

Overview

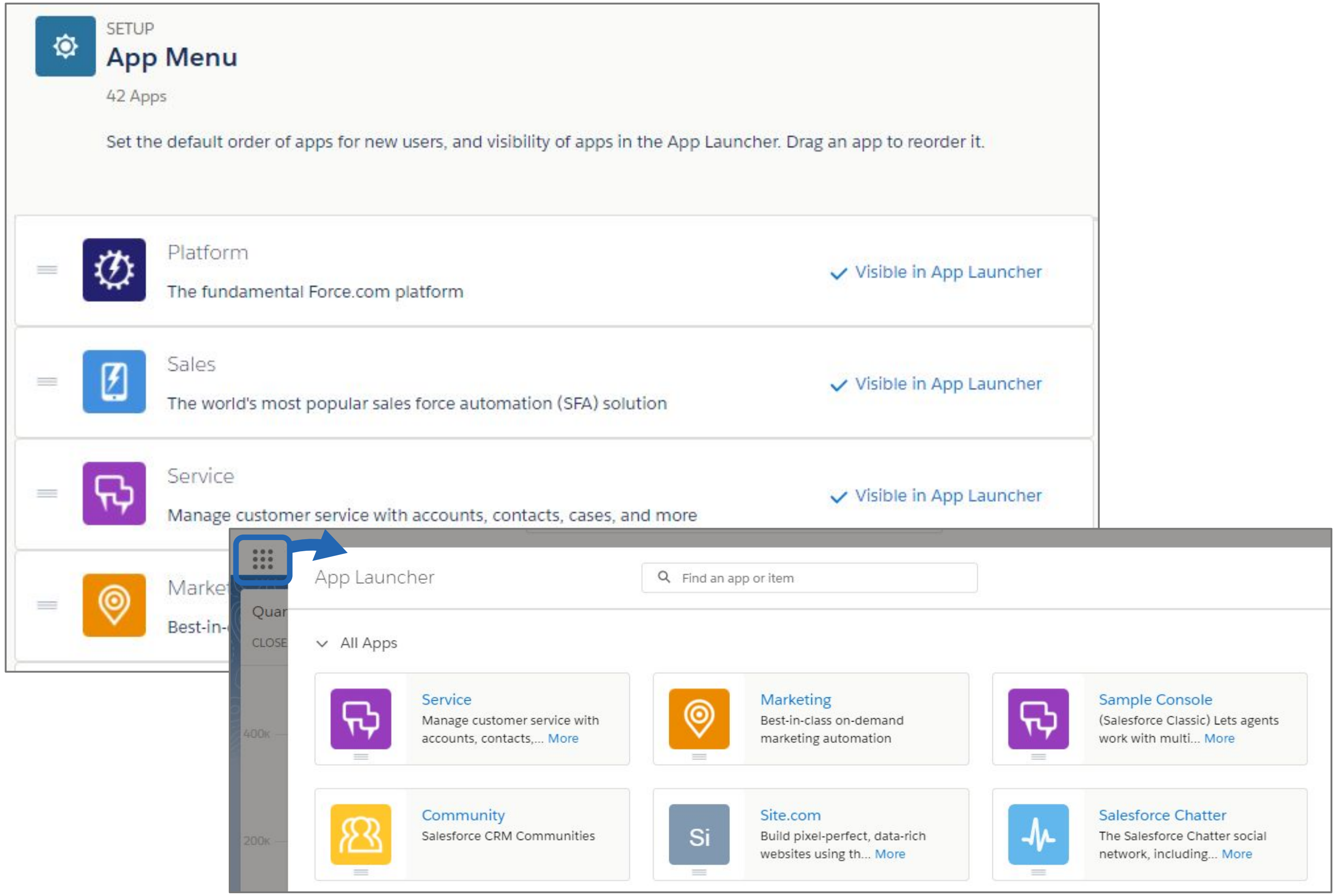


App Menu

Setup | User Interface | App Menu

Apps

- All apps installed in the org appear on the app menu items list. However, the apps that users see in their app menu and App Launcher vary depending on each app's visibility settings and the user's permissions
- Users see only the apps that they are authorized to see according to their profile or permission sets
- From the list of app menu items, drag the apps to change their order. Changes take effect immediately
- Optionally, click Visible in App Launcher or Hidden in App Launcher to show or hide individual apps from the App Launcher for all users in the org



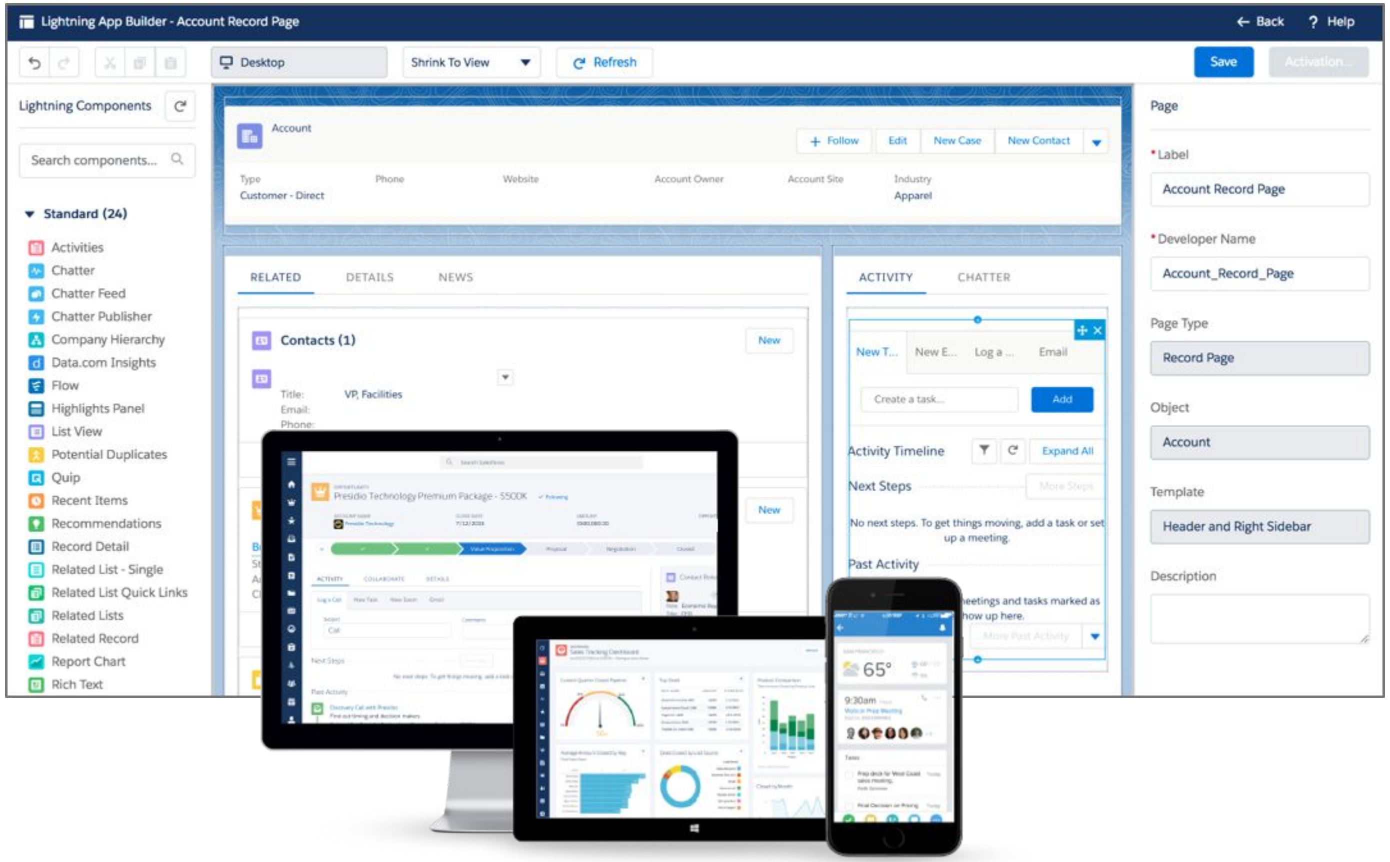
Lightning App Builder

Setup | User Interface | Lightning App Builder

Lightning Apps

The Lightning App Builder is a point-and-click tool that makes it easy to create custom pages for the Salesforce app and Lightning Experience. You can combine various components on a single page to give your users what they need all in one place. With the Lightning App Builder, you can build:

- Single-page apps that drill down into standard pages
- Dashboard-style apps, such as apps to track top sales prospects or key leads for the quarter
- “Point” apps to solve a particular task, such as an expense app for users to enter expenses and monitor expenses they’ve submitted
- Custom record pages for your objects, tailored to the needs of your users
- Custom Home pages containing the components and features that your users use most

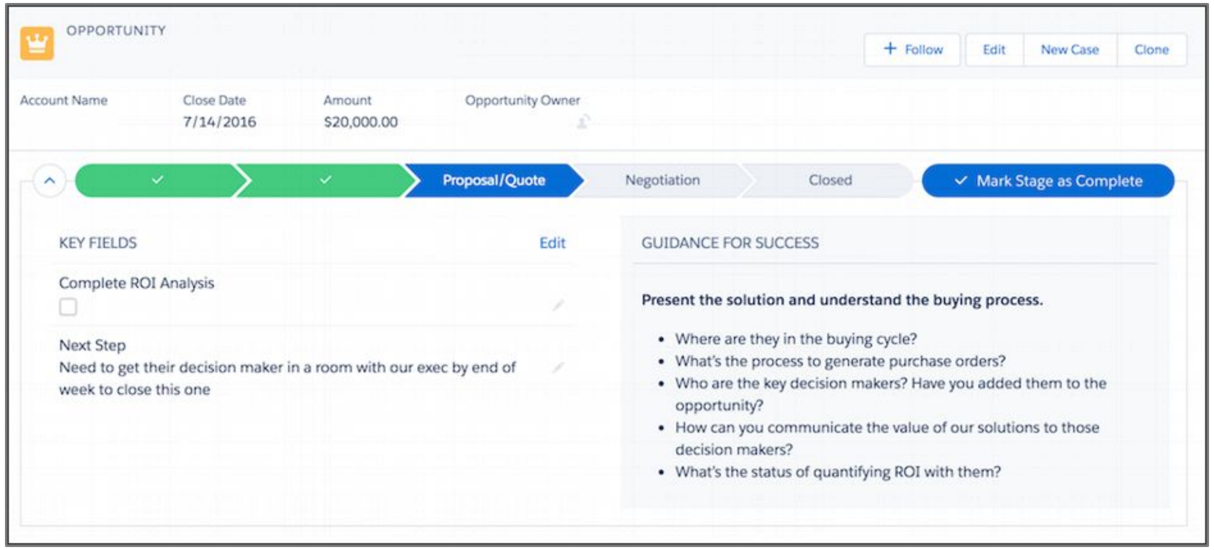


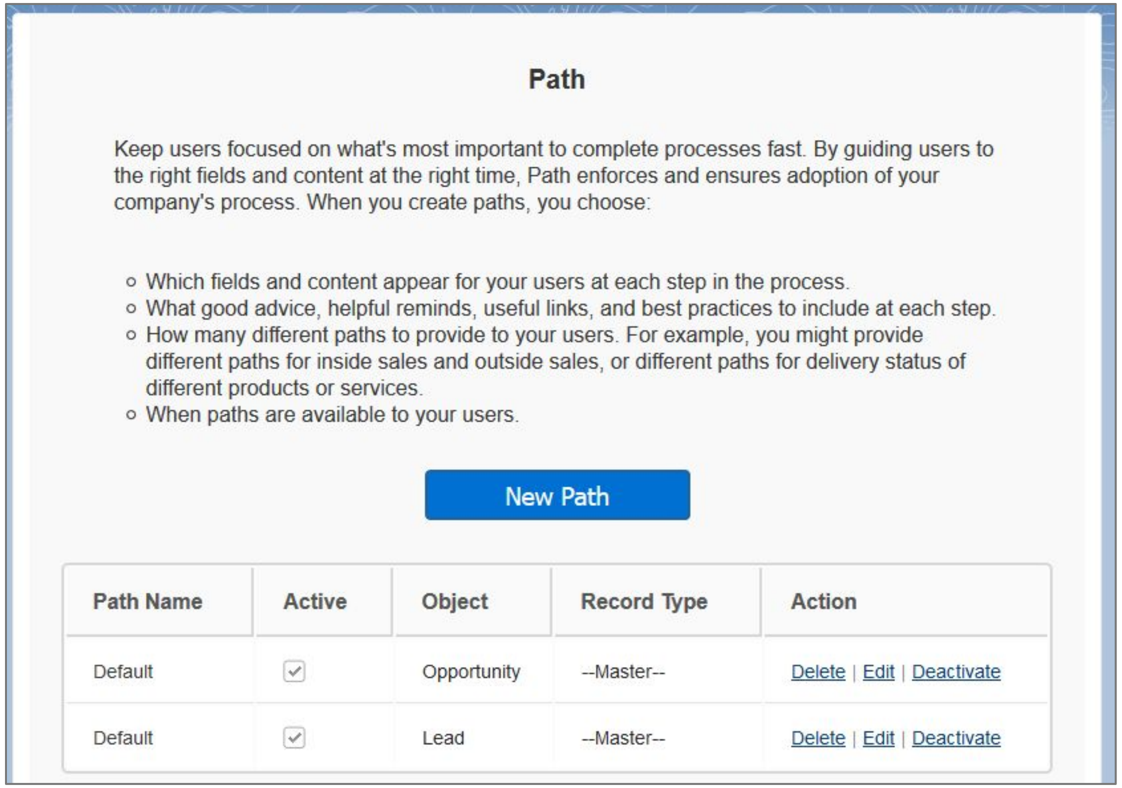
Path Settings

Setup | User Interface | Path Settings

Path

- Use the Path component on opportunity, lead, campaigns, contracts, orders, and custom object detail pages in communities to show various stages of a business process
- The Path component is intended for a wide-column layout. Add it to columns that are at least 50% wide, though full columns are best



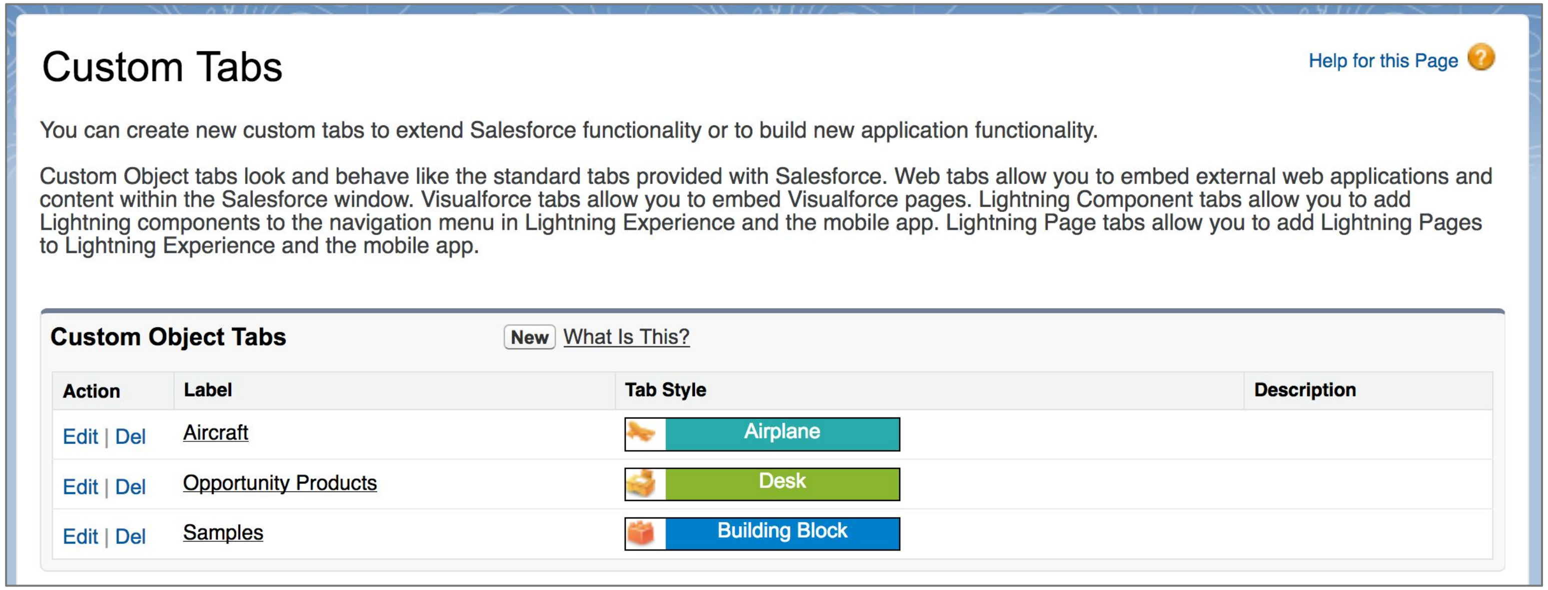


Tabs

Setup | User Interface | Tabs

Custom Tabs

- Custom tabs let you display custom object data or other web content in Salesforce. When you add a custom tab to an app in Lightning Experience, it displays as an item in the app's navigation bar
- When creating a tab for a custom object, select an icon to display, which profile should access the tab and in which app you want to include the tab

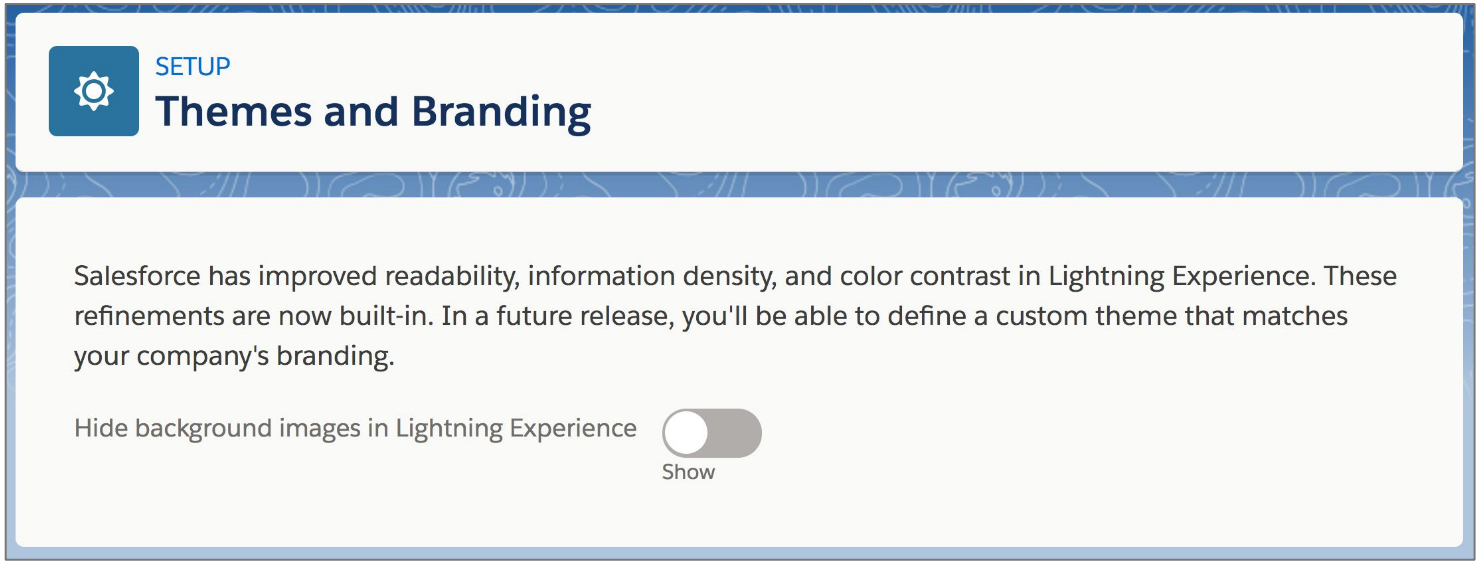


Themes and Branding

Setup | User Interface | Themes and Branding

Branding

- Salesforce has improved readability, information density, and color contrast in Lightning Experience. These refinements are now built-in
- In a future release, you'll be able to define a custom theme that matches your company's branding (available early 2018)



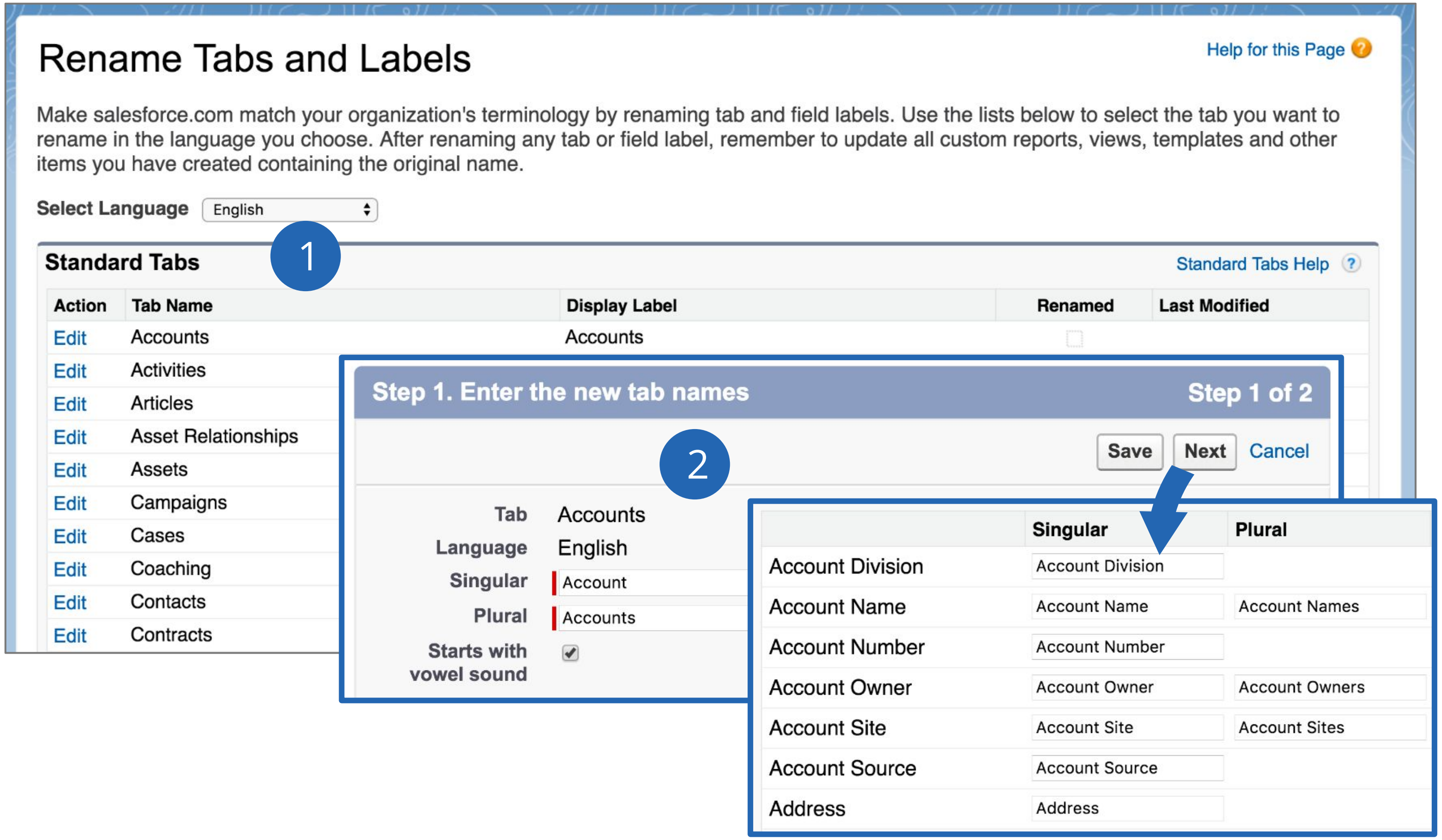
Rename Tabs and Labels

Setup | User Interface | Rename Tabs and Labels

Rename

With Rename Tabs and Labels you can change the name of almost any object, field, or tab in Salesforce

1. Select a language on the top of the page in which you want to make changes and click on an object
2. Enter a new tab name or click next to make changes on field names



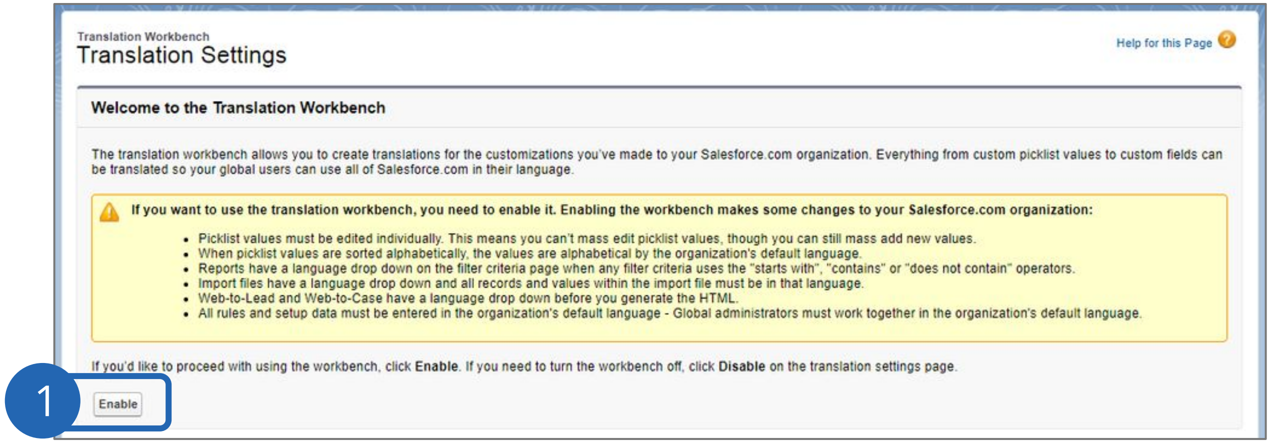
Translation Workbench

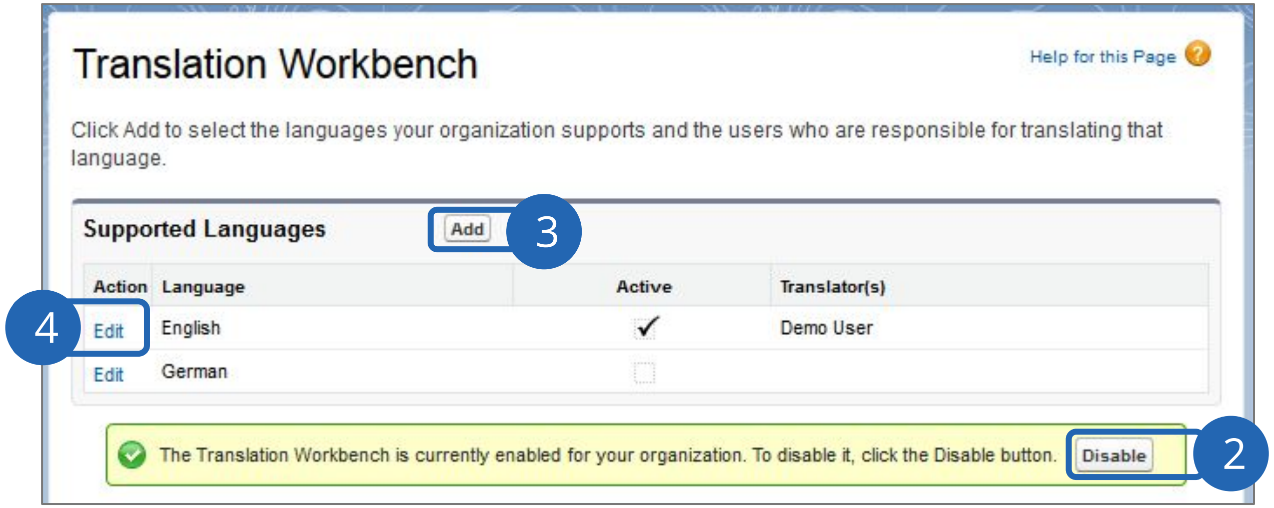
Setup | User Interface | Translation Workbench | Translation Settings

Translation

The Translation Workbench lets you specify languages you want to translate, assign translators to languages, create translations for customizations you've made to your Salesforce organization, and override labels and translations from managed packages. Everything from custom picklist values to custom fields can be translated so your global users can use all of Salesforce in their language.

1. On the welcome page, click Enable.
2. To disable the Translation Workbench, from Setup, enter Translation Settings in the Quick Find box, select Translation Settings, and then click Disable.
3. To add new Languages click Add Button and select from all available Languages.
   - More Languages can be activated via Setup | Company Setting | Language Settings
4. Click on the Edit Link next to the Language to adjust the Translation of the specific Language.



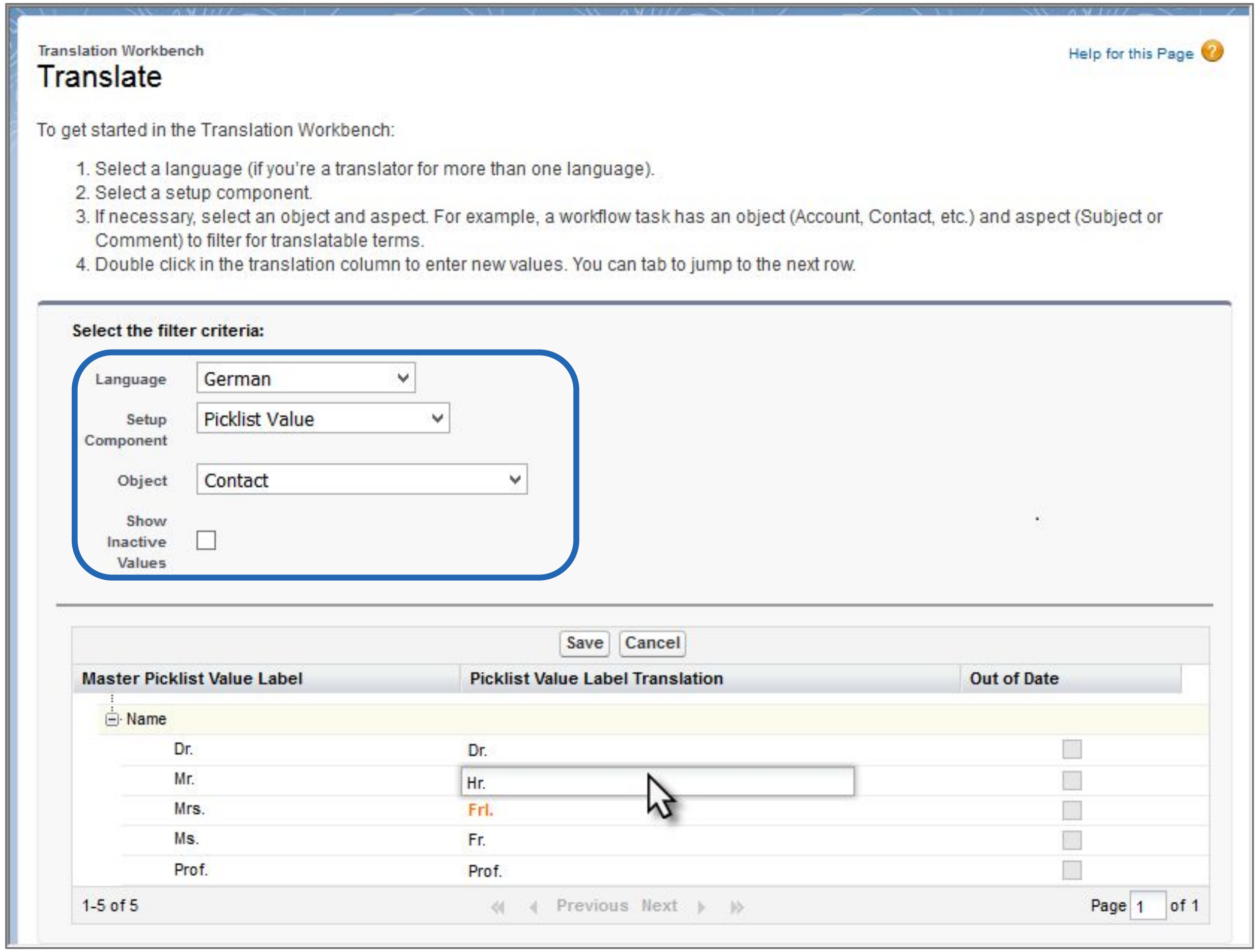


Translation Workbench

Setup | User Interface | Translation Workbench | Translate

Translation

- Select the Language you're translating into.
- Select a Setup Component. Click the pull-down menu to select from the list of translatable customizations. See Translatable Customizations for a complete list of possible customizations.
- Depending on the setup component, select the next options.
  The aspect is a part of the setup component that you can translate. For example:
    - Workflow tasks have an object (Account, Contact, etc.) and aspect (Subject or Comment).
    - Flows have a flow type (Flow and Autolaunched Flow), a flow name, and a flow component (Definition, Version, Screen Info, Screen Field, and Choice). Flow components can have a flow version, screen, or aspect.
- Double click in the translation column to enter new values. You can press TAB to advance to the next editable field or SHIFT-TAB to go to the previous editable field. .



Translation Workbench

Setup | User Interface | Translation Workbench | Export

Translation

- Create files that contain your org's translatable metadata, such as custom fields, report types, and picklist values. Send these files to your outside translators or translation agency for bulk translation activities, then use **Import** to update your labels.

- Select which labels you want to export.

  Source–Used as the initial source for creating new translations.

  Creates a single file that contains a list of all your translatable customizations. Typically, the content is in your organization's default language.

  Untranslated–Used to make updates.

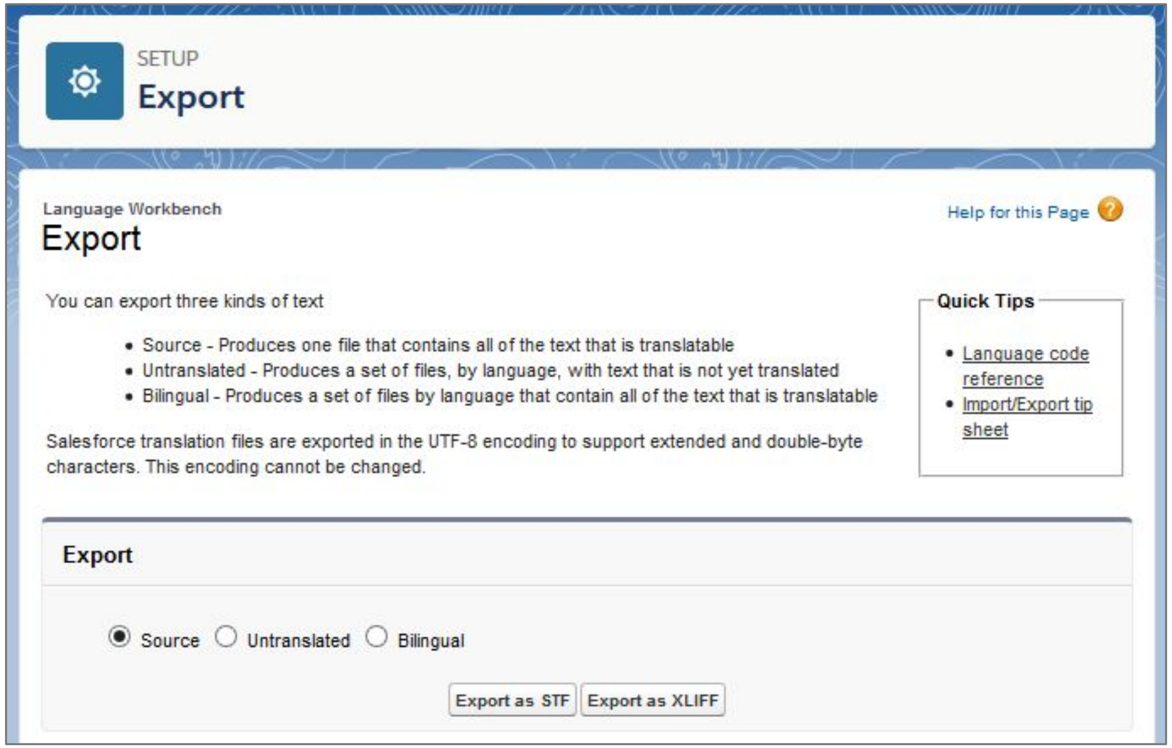
  Creates a set of files that contain only customizations that have not been translated, including new and modified customizations.
  One file is created for each language. These files are then compressed into .zip files.

  Bilingual–Used for reference and reviewing all your untranslated and translated customizations.

  Creates a list of all the translatable labels in their current translated or untranslated state.
  One file is created for each language. These files are then compressed into .zip files.

- Click Export. A status message tells you that the export is being processed. When the export is complete an email is sent to the email address specified in your profile.

  Locate the exported .stf, .xlf, or .zip file.

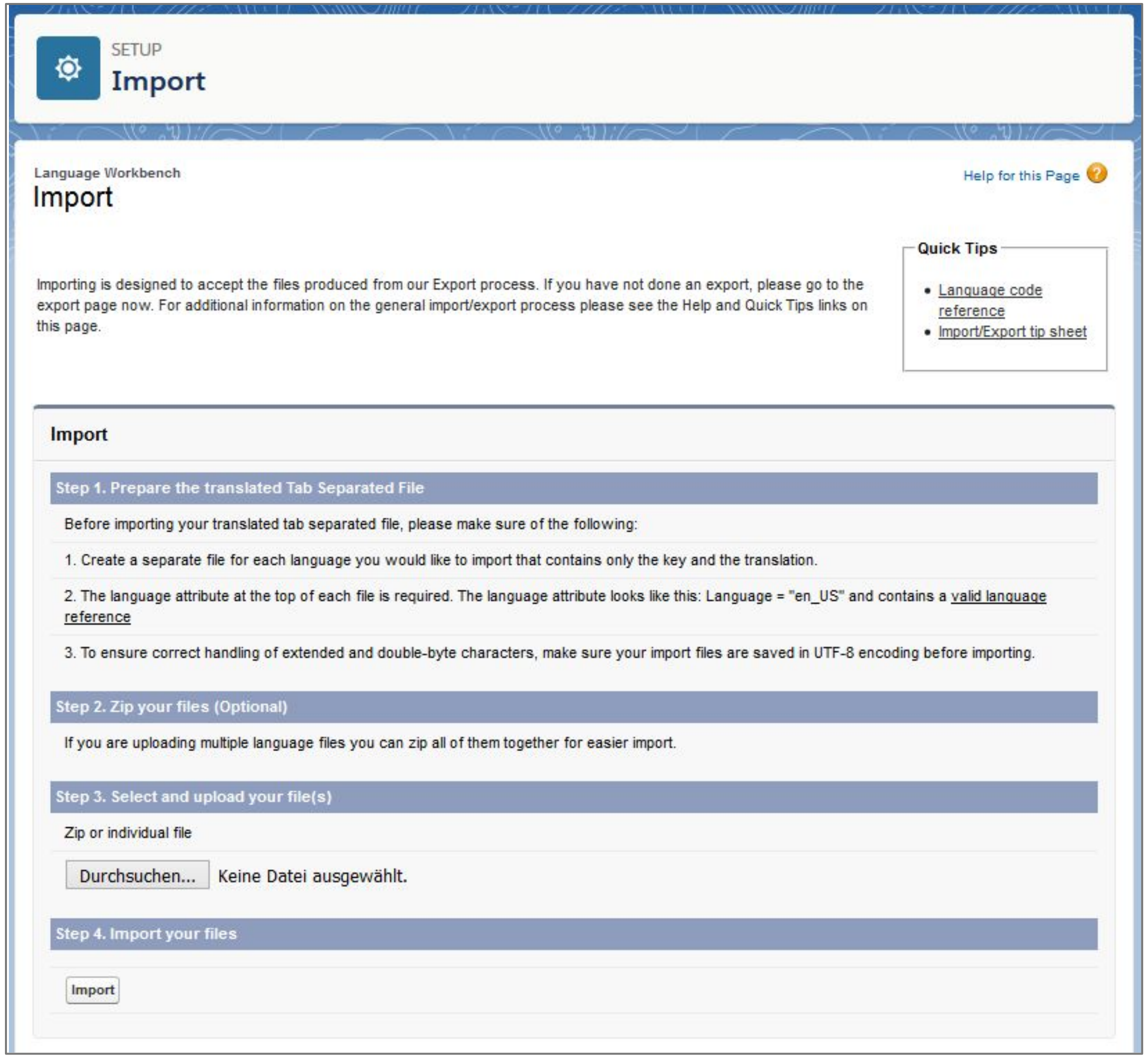


Translation Workbench

Setup | User Interface | Translation Workbench | Import

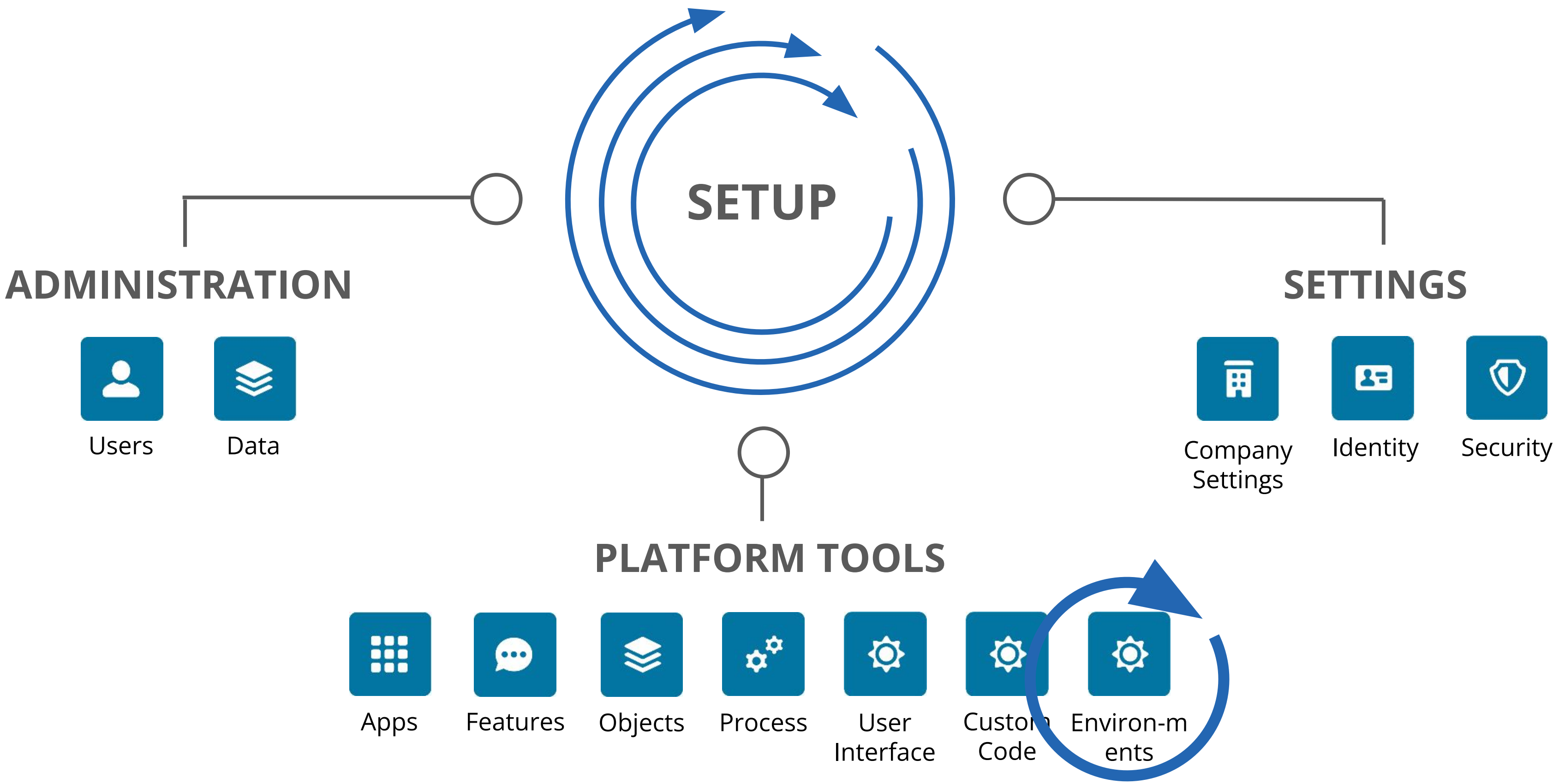
Translation

- Import and update the translations for your org's metadata, such as custom fields, report types, and picklist values. Typically, the original files are exported from Salesforce, then sent to your outside translators or translation agency for bulk translation activities and returned to you for importing.
- Click Browse to locate and select the file you want to import.
- Click Import.
- After the import is complete:
  - The labels are updated with the translations.
  - A confirmation email is sent to the email address specified in your profile.
- Verify the imported changes have been implemented. You can:
  - Check labels in your Salesforce organization.
  - Check labels through the Translation Workbench.



Setup

Overview

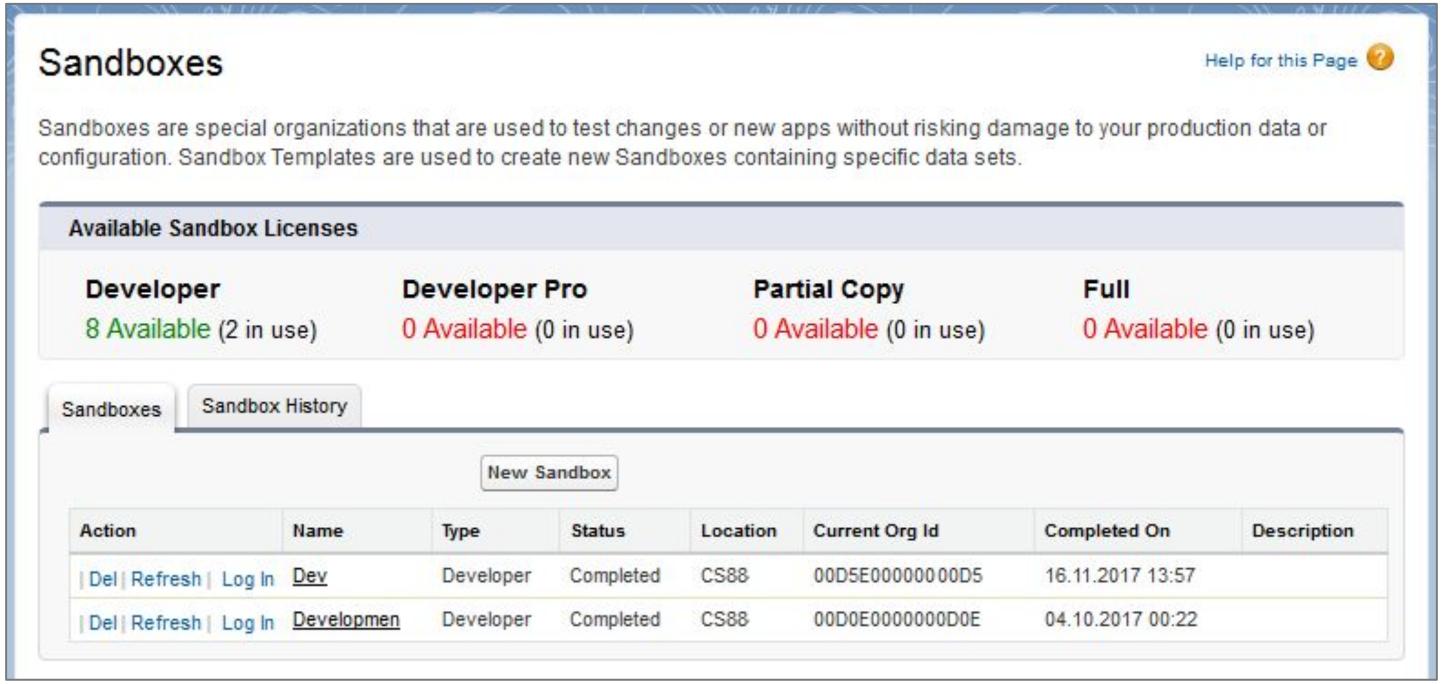


Sandboxes

Setup | Environments | Sandboxes

Sandboxes

- Sandboxes are isolated from your production org, so operations that you perform in your sandboxes don't affect your production org. There are different types of sandboxes:
    - Developer Sandbox
    - Developer Pro Sandbox
    - Partial Copy Sandbox
    - Full Sandbox
- Log in to your sandbox by clicking on the link beside your sandbox name (only the creator of the Sandbox can see this link) or use the URL: https://test.salesforce.com
- If you want to give other users access to your sandbox, you must update their usernames in the Sandbox first

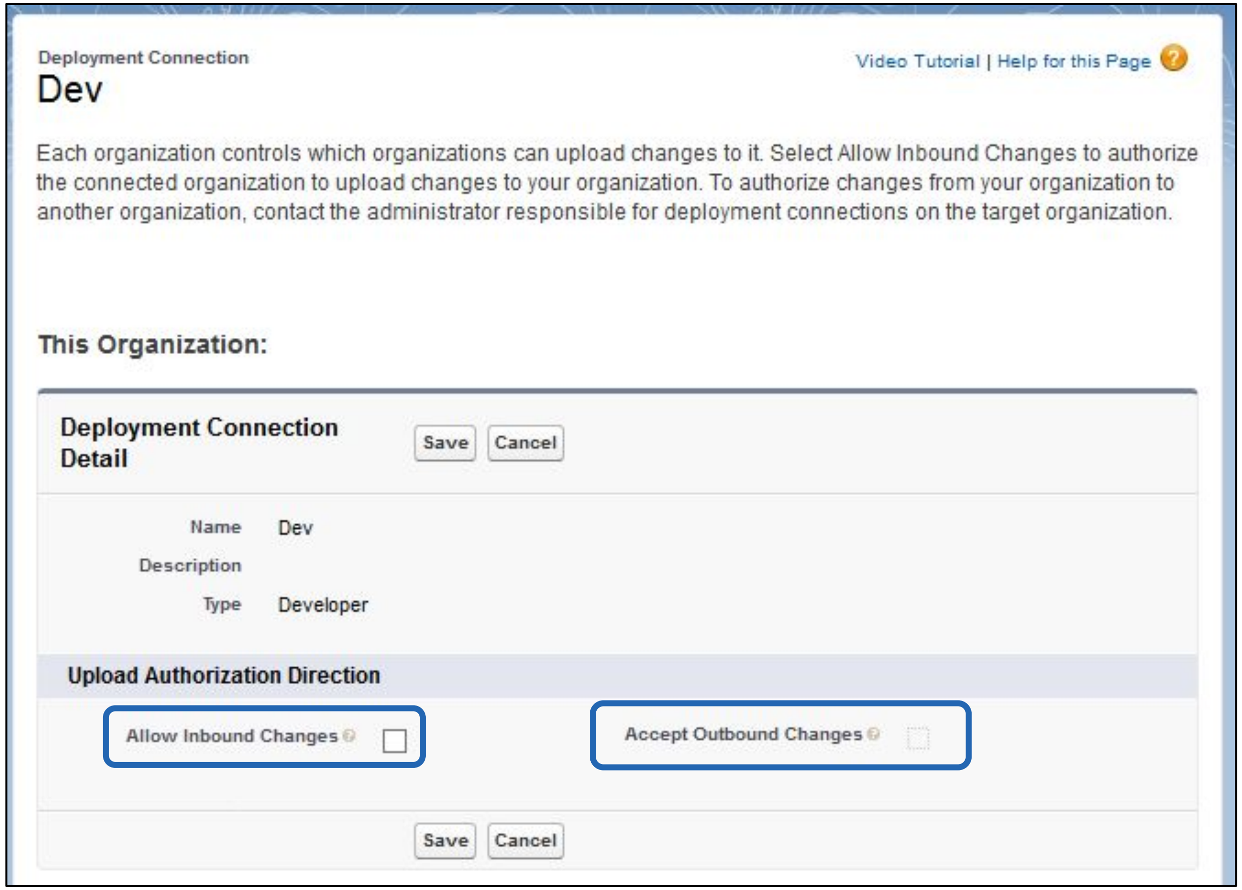


Deployment Settings

Setup | Environments | Deploy | Deployment Settings

Deployment

- A deployment connection enables customizations to be copied from one Salesforce org to another
- The deployment connections list shows which orgs are authorized to upload changes to this org, and which orgs allow this org to upload changes to them
- **On Production Org:** Activate Checkbox to authorize inbound deployment
- **On Sandbox:** Activate Checkbox to authorize outbound deployment

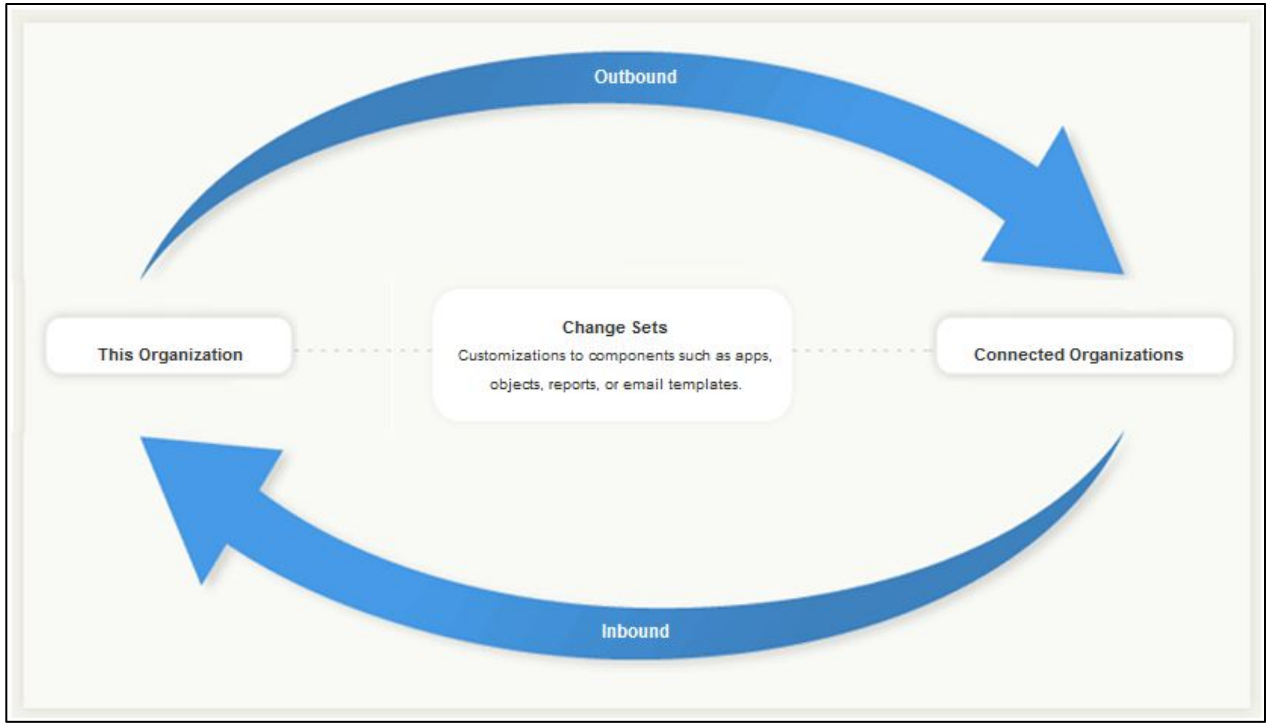


Inbound & Outbound Change Sets

Setup | Environments | Change Sets | Inbound & Outbound Change Sets

Change Sets

- Use change sets to send customizations from one Salesforce org to another
- When you are on a Sandbox, use Outbound Change Sets to send Change Sets to your Production Org
- When you are on the Production Org., use Inbound Change Sets to see all received change sets
- All Change Sets have to be validated before those will be deployed on Production.
  You can validate a change set without deploying changes, change sets that have been successfully validated might qualify for a quick deployment

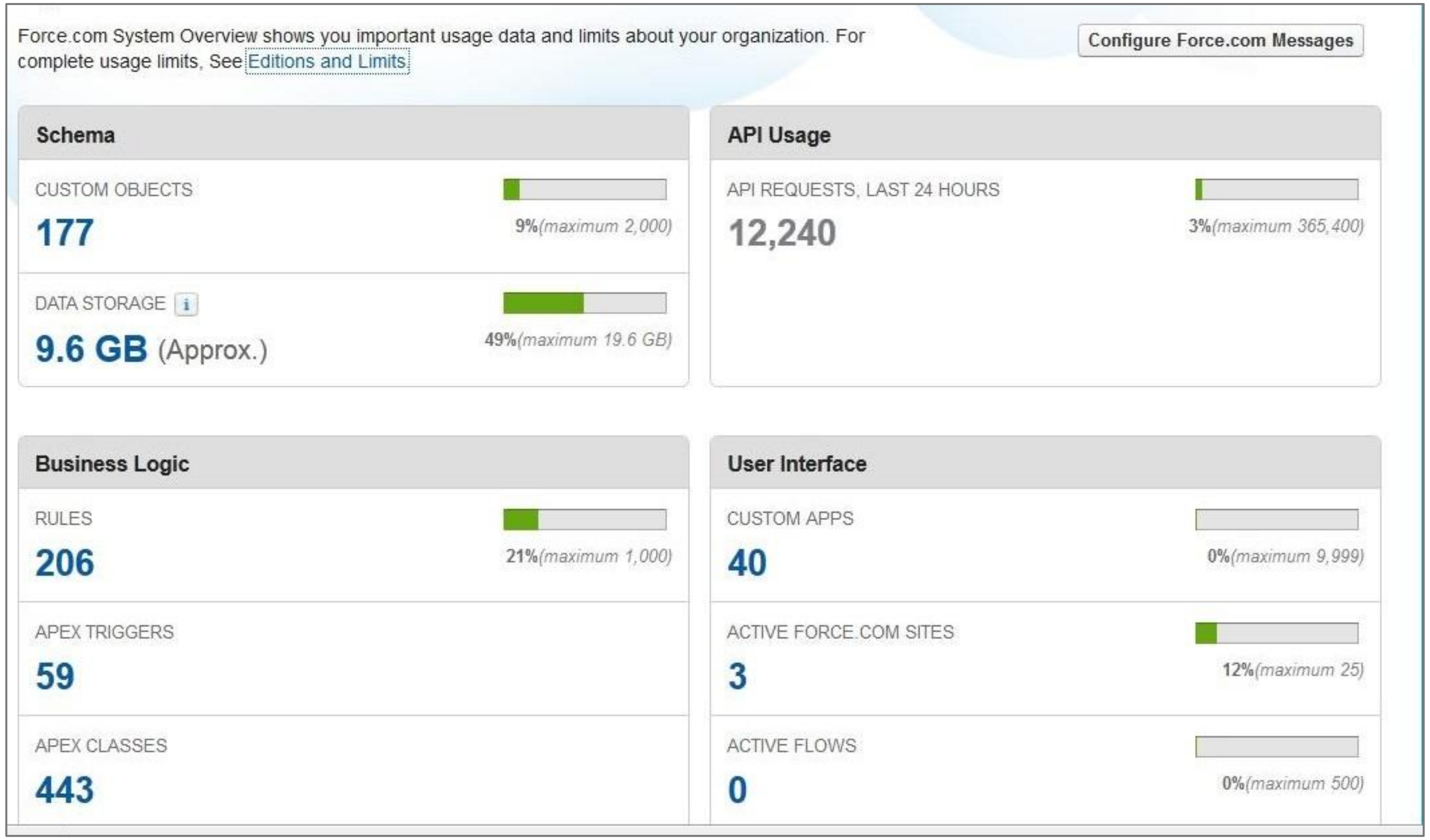


System Overview

Setup | Environments | System Overview

Overview

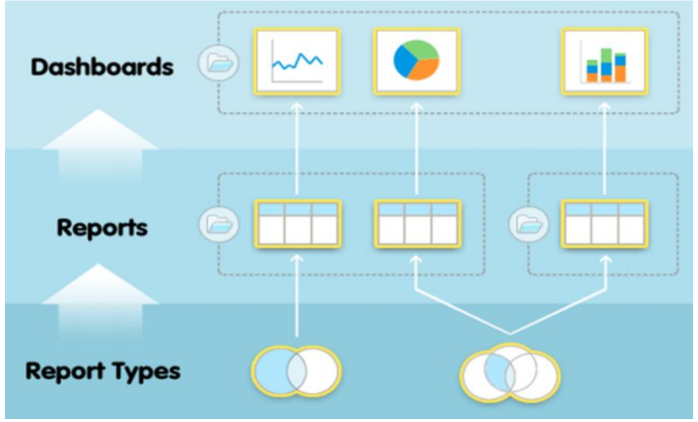
- The system overview page shows usage data and limits for your organization, and displays messages when you reach 95% of your limit (75% of portal roles)
- Click the numbers under each metric to get more details about your usage. If it's available, use Checkout to increase usage limits for your organization
- For example, if your organization reaches the limit for custom objects, the system overview page notifies you with a message link. Click the link to clean up any unused objects, or visit Checkout to increase your limit for objects



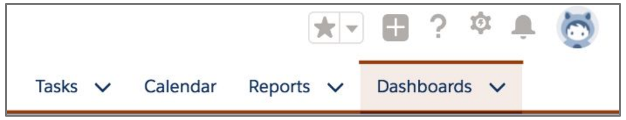
Reports & Dashboards

Reports & Dashboards

Learn how to use Reports & Dashboards

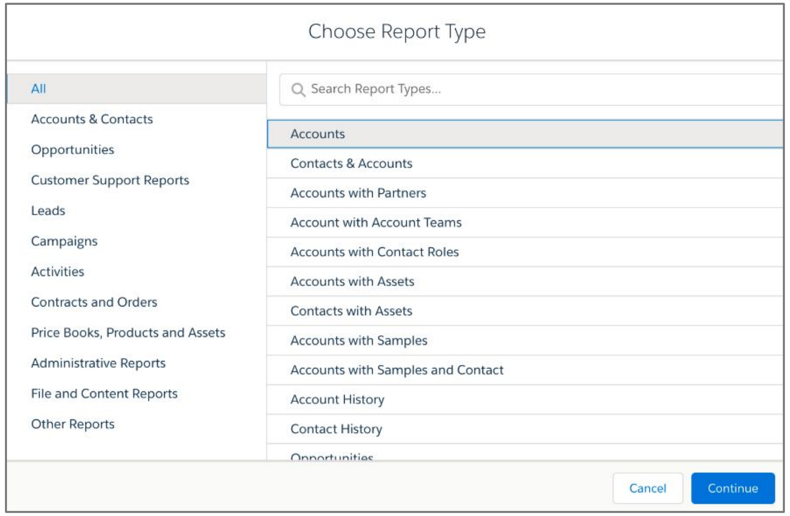


Dashboards represent data of a report via graphics, which allow users to see key metrics and performances quickly and comprehensively



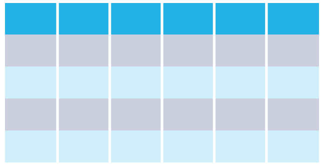
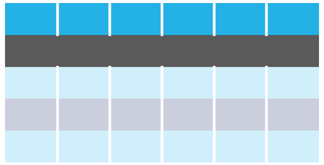
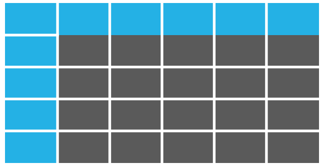
Reports help you to access data quickly and comprehensively and is a resource component for building dashboards

Report types are templates for report creation



Reports

Report Formats

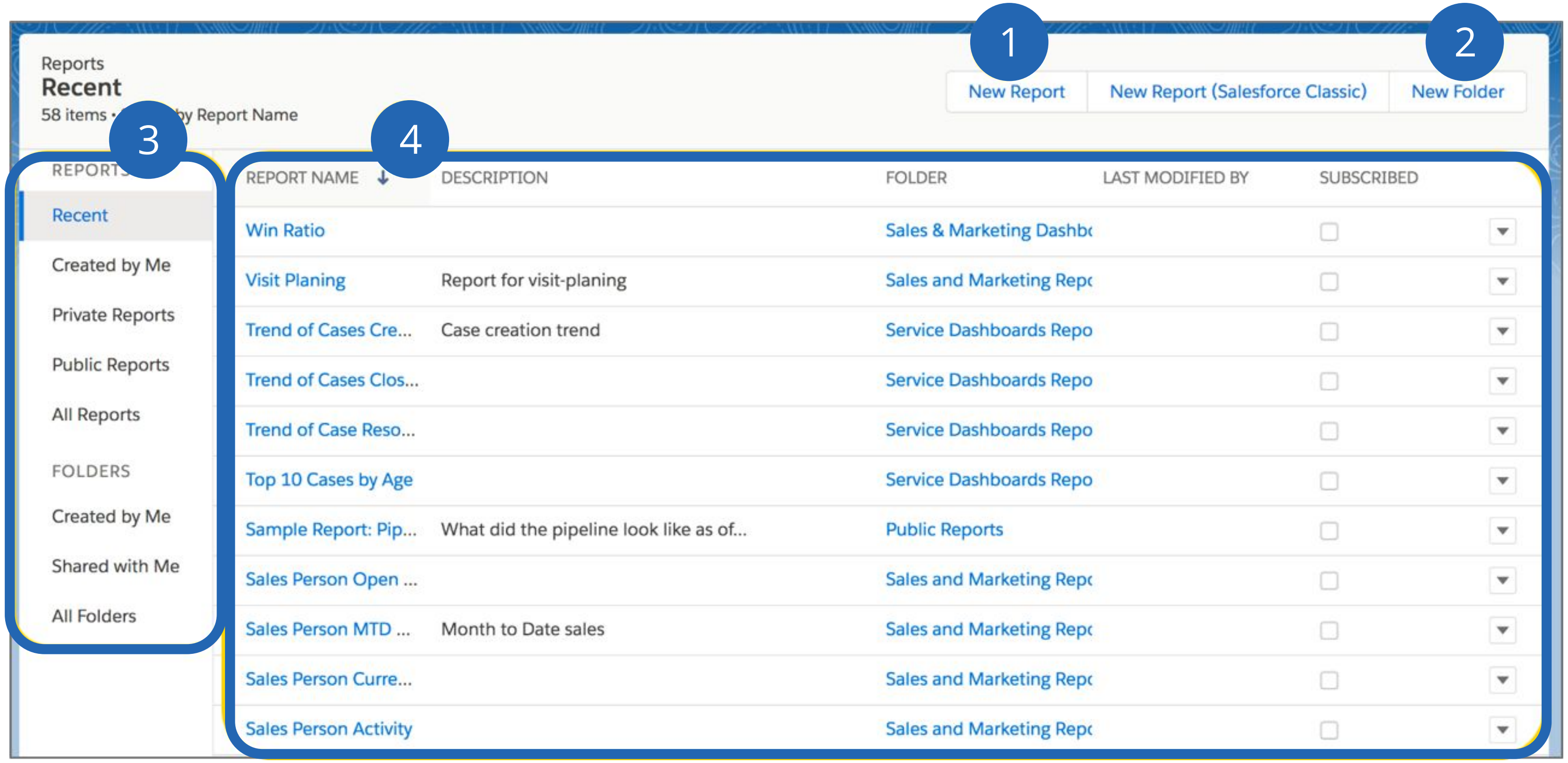
Format	Description	Example	Illustrative
Tabular	Tabular reports are the simplest and fastest way to look at data. Similar to a spreadsheet, they simply consist of an ordered set of fields in columns. Tabular reports are best for creating lists of records over a list with a single grand total.	Customer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

Reports

Landing page

Overview

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

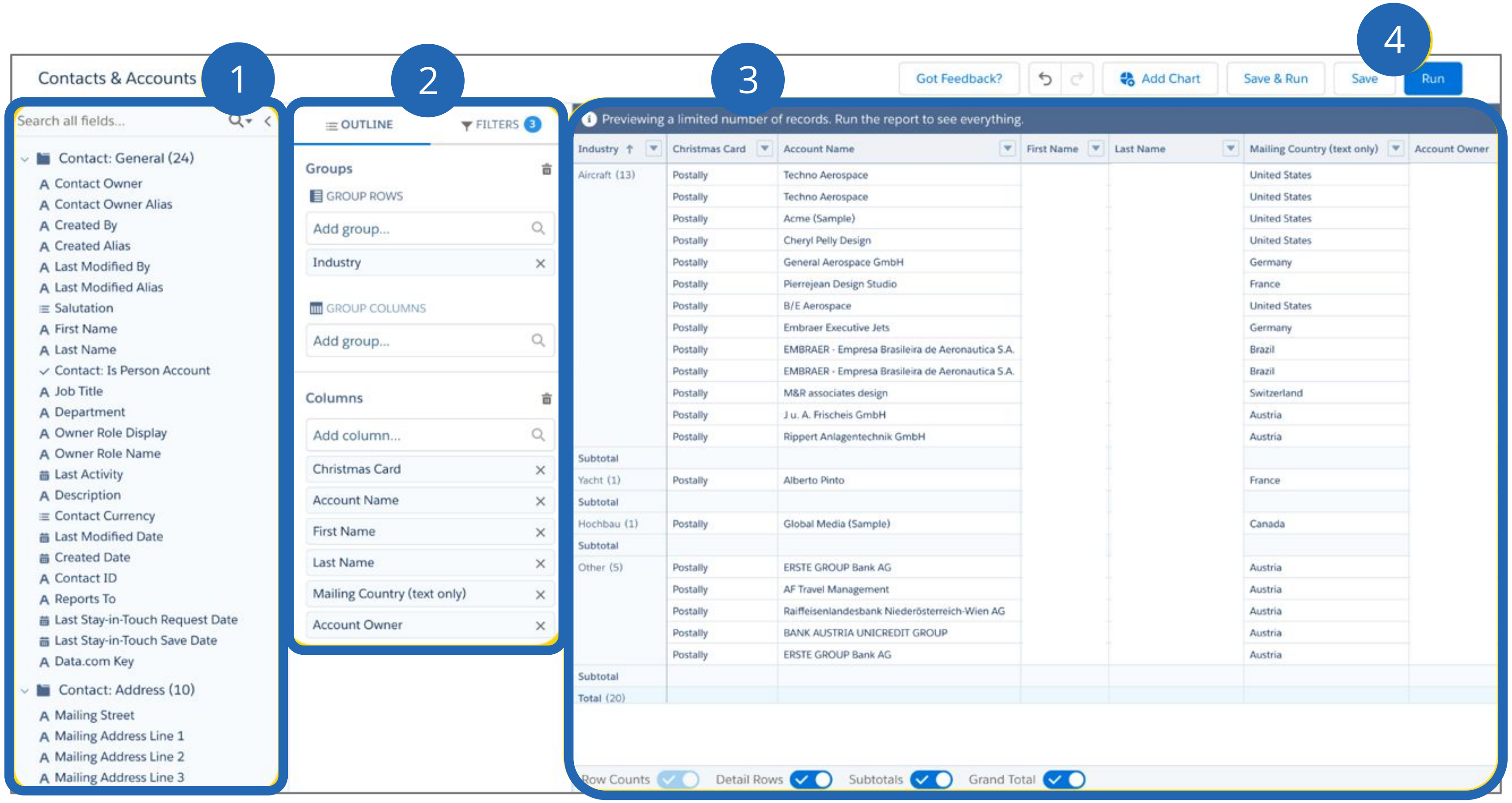


Reports

Create a new report

Report Builder

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

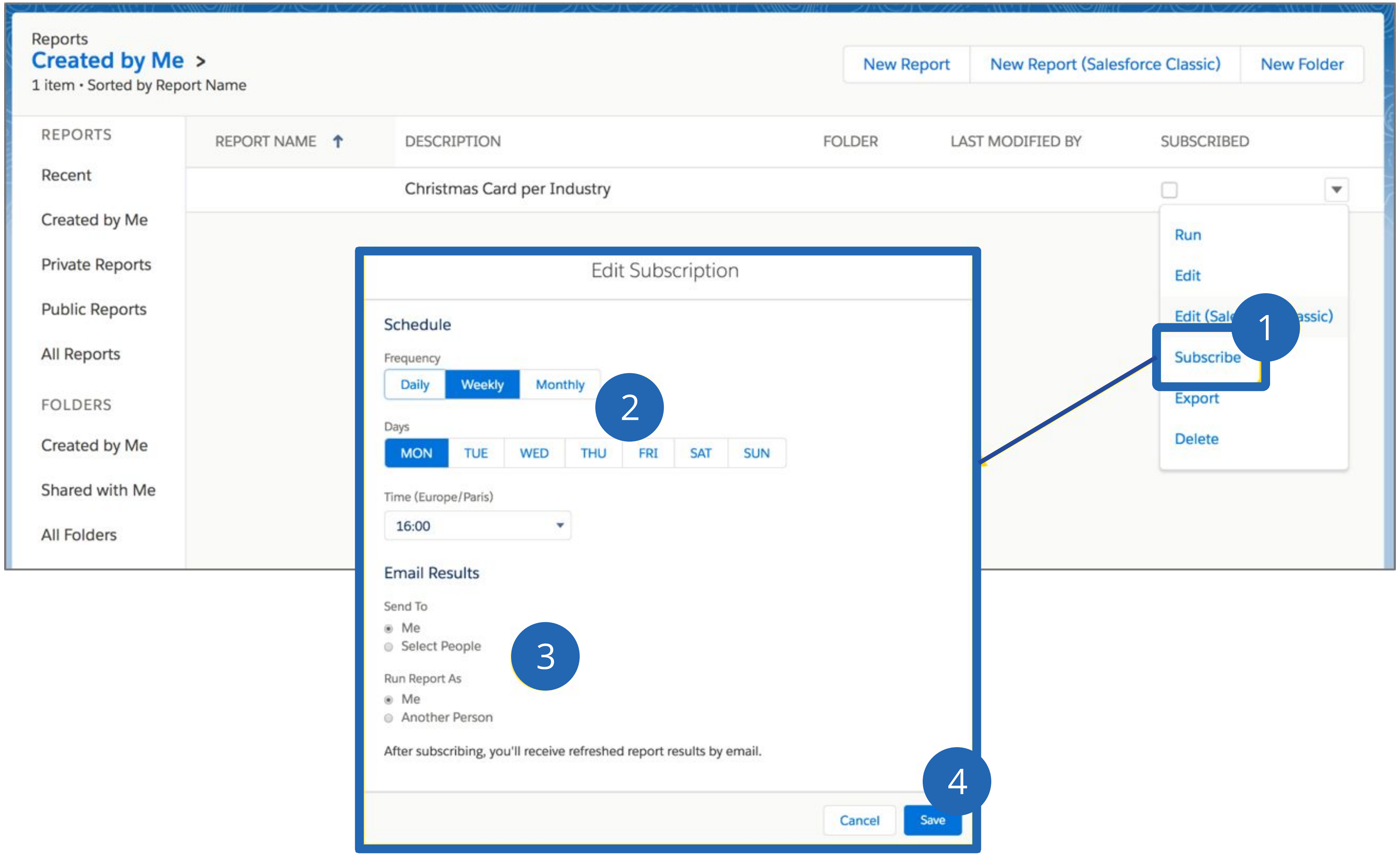


Reports

Subscribe to reports

Subscribe Reports

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

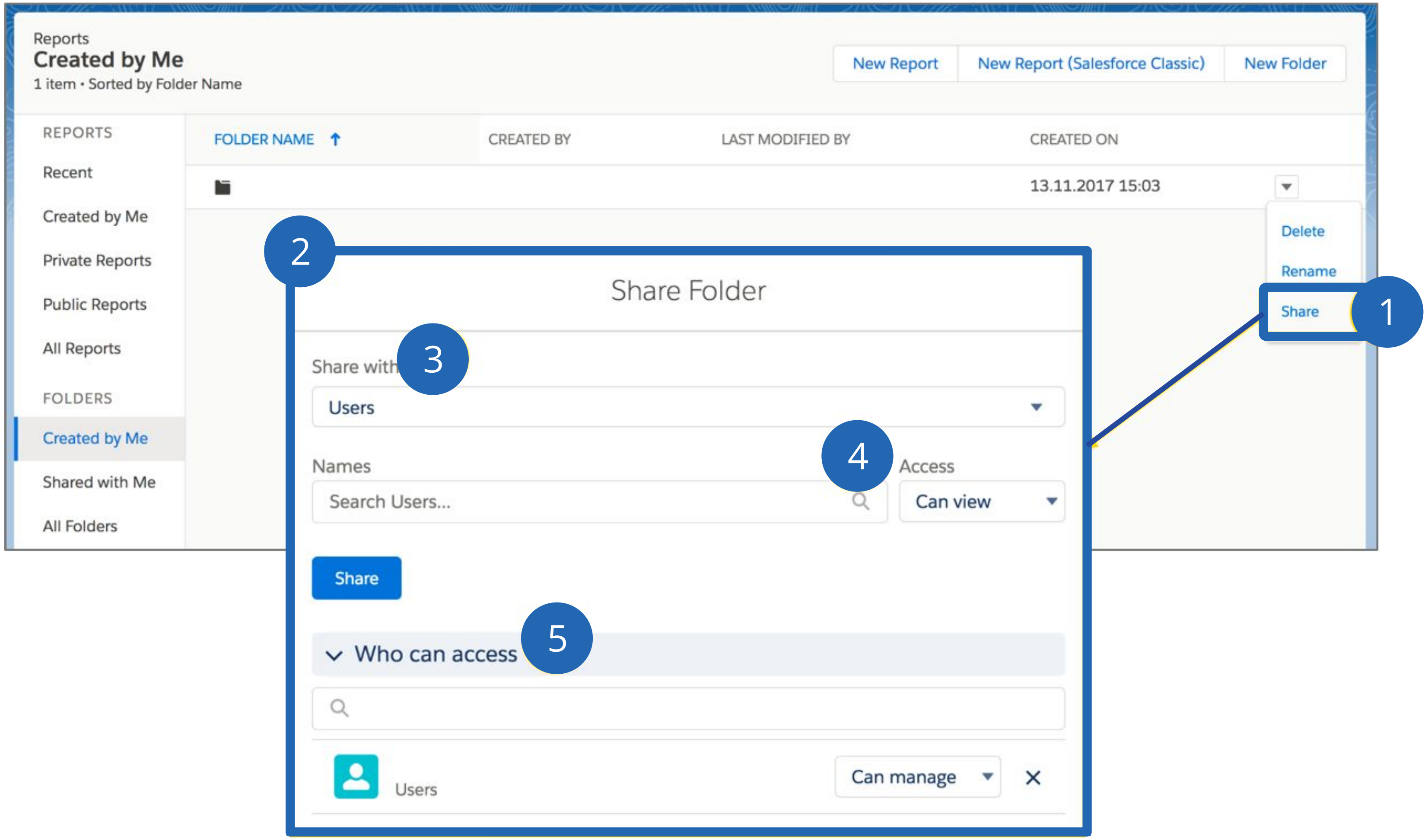


Reports

Sharing of Reports

Sharing

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

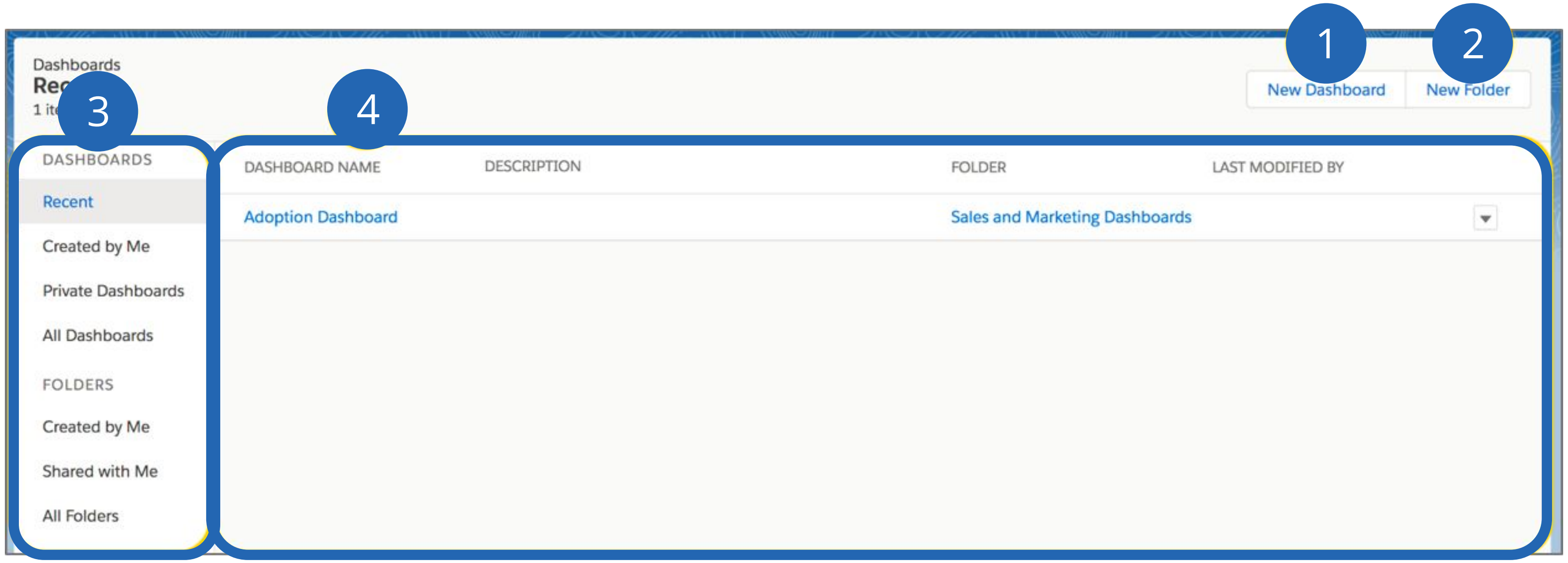


Dashboards

Landing page

Overview

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



Dashboards

Dashboards chart types

Funnel	Donut	Metric	Gauge
			

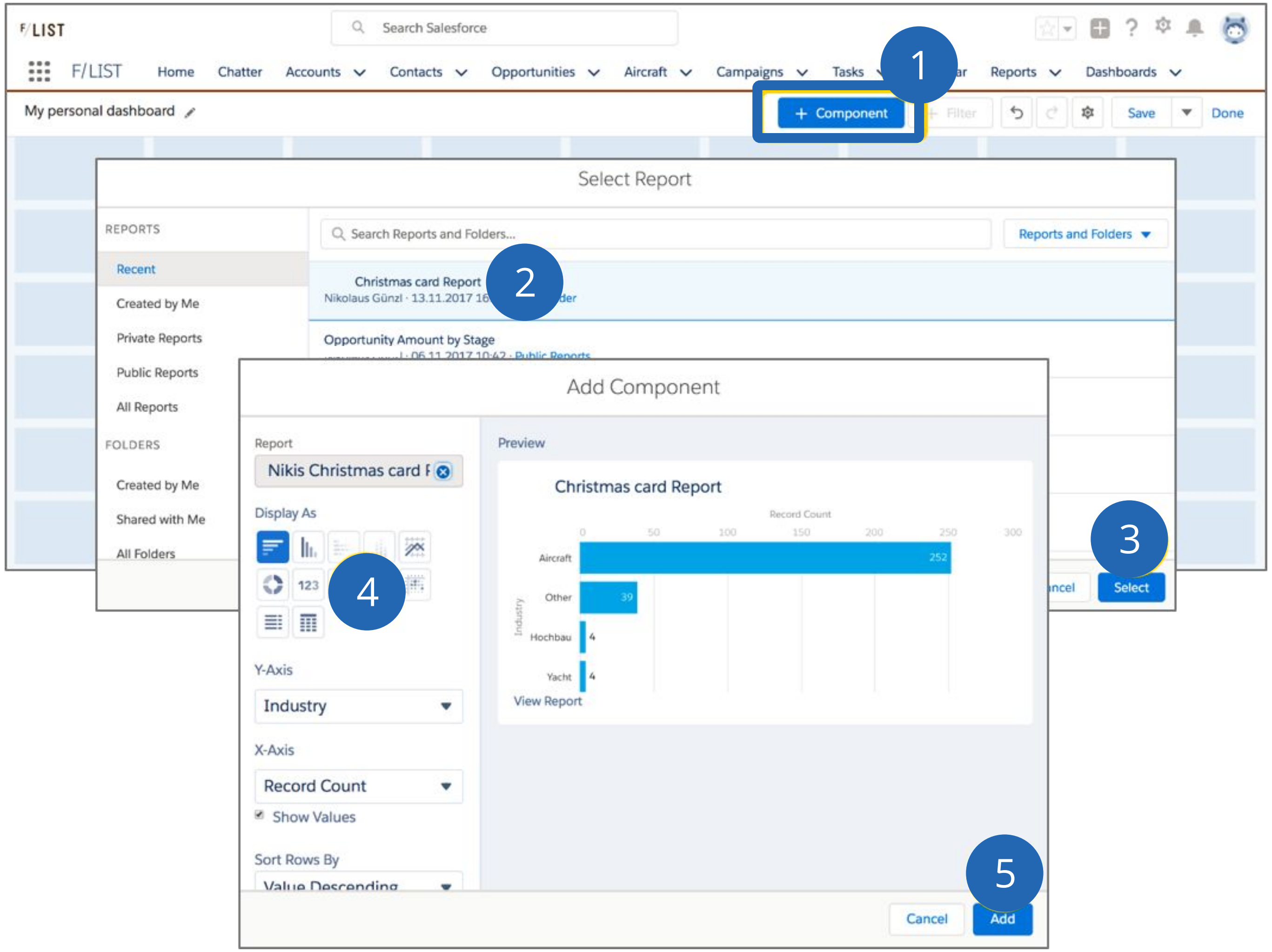
<table>
<tr><th>Line</th><th>Bar</th><th>Scatter</th><th>Table</th></tr>
<tr><td></td><td></td><td></td><td>
<table>
<tr><th>FISCAL PERIOD</th><th>SUM OF AMOUNT (...</th></tr>
<tr><td>Q3-2015</td><td>EUR 237.500,00</td></tr>
<tr><td>Q2-2015</td><td>EUR 86.000,00</td></tr>
<tr><td>Q1-2015</td><td>EUR 75.000,00</td></tr>
<tr><td>Q4-2014</td><td>EUR 63.000,00</td></tr>
<tr><td>Q3-2014</td><td>EUR 60.000,00</td></tr>
<tr><td>Q4-2015</td><td>EUR 27.000,00</td></tr>
</table>
</td></tr>
</table>

Dashboards

Create a new dashboard

Add components

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



Trailhead

The fun way to learn Salesforce

Reports & Dashboards

https://trailhead.salesforce.com/en/content/learn/modules/lex_implementation_reports_dashboards

Project: Quickstart Reports & Dashboards

https://trailhead.salesforce.com/projects/quickstart-reports

Create Reports and Dashboards for Sales and Marketing Managers

https://trailhead.salesforce.com/en/projects/create-reports-and-dashboards-for-sales-and-marketing-managers

Thank you.

Helpful Links

View and Manage Users

https://help.salesforce.com/articleView?id=admin_users.htm&type=0

Add a Single User

https://help.salesforce.com/articleView?id=adding_new_users.htm&type=5

User Management

https://help.salesforce.com/articleView?id=users_mgmt_overview.htm&type=5

Helpful Links

Manage Profile Lists

https://help.salesforce.com/articleView?id=users_profiles_view.htm&type=0

Clone Profiles

https://help.salesforce.com/articleView?id=users_profiles_cloning.htm&type=5

Profiles

https://help.salesforce.com/articleView?id=admin_userprofiles.htm&type=5

Helpful Links

User Role Hierarchy

https://help.salesforce.com/articleView?id=admin_roles.htm&type=0

Assign Users to Roles

https://help.salesforce.com/articleView?id=assigning_users_to_roles.htm&type=5

Guidelines for Success with Roles

https://help.salesforce.com/articleView?id=setup_roles_guidelines.htm&type=5

Helpful Links

Permission Sets

https://help.salesforce.com/articleView?id=perm_sets_overview.htm&type=5

Create Permission Sets

https://help.salesforce.com/articleView?id=perm_sets_create.htm&type=5

Assign Permission Sets to a Single User

https://help.salesforce.com/articleView?id=perm_sets_assigning.htm&type=5

Helpful Links

What Is a Group?
https://help.salesforce.com/articleView?id=user_groups.htm&type=0

Create and Edit Groups
https://help.salesforce.com/articleView?id=creating_and_editing_groups.htm&type=5

Public Group Considerations
https://help.salesforce.com/articleView?id=user_groups_considerations.htm&type=5

Helpful Links

Data Import Wizard

https://help.salesforce.com/articleView?id=data_import_wizard.htm&type=0

Import Data with the Data Import Wizard

https://help.salesforce.com/articleView?id=import_with_data_import_wizard.htm&type=5

Choosing a Method for Importing Data

https://help.salesforce.com/articleView?id=import_which_data_import_tool.htm&type=5

Helpful Links

Export Backup Data from Salesforce

https://help.salesforce.com/articleView?id=admin_exportdata.htm&type=0

Delete Multiple Records and Reports

https://help.salesforce.com/articleView?id=admin_massdelete.htm&type=0

Monitor Data and Storage Resources

https://help.salesforce.com/articleView?id=admin_monitorresources.htm&type=0

Helpful Links

Things to Know About Duplicate Rules

https://help.salesforce.com/articleView?id=duplicate_rules_overview.htm&type=0

Create or Edit Duplicate Rules

https://help.salesforce.com/articleView?id=duplicate_rules_create.htm&type=5

Matching Criteria for Matching Rules

https://help.salesforce.com/articleView?id=matching_rule_matching_criteria.htm&type=5

Helpful Links

Set Up Your Company in Salesforce

https://help.salesforce.com/articleView?id=admin_profile.htm&type=0

Feature Licenses Overview

https://help.salesforce.com/articleView?id=users_understanding_feature_licenses.htm&type=5

Language Settings Overview

https://help.salesforce.com/articleView?id=setting_your_language.htm&type=0

Manage Multiple Currencies

https://help.salesforce.com/articleView?id=admin_currency.htm&type=0

Helpful Links

Monitor Login History
https://help.salesforce.com/articleView?id=users_login_history.htm&type=0

Identity Verification History
https://help.salesforce.com/articleView?id=security_verification_history.htm&type=5

Set Trusted IP Ranges for Your Organization
https://help.salesforce.com/articleView?id=security_networkaccess.htm&type=0

Restrict Where and When Users Can Log In to Salesforce
https://help.salesforce.com/articleView?id=admin_loginrestrict.htm&type=5

Helpful Links

Sharing Settings

https://help.salesforce.com/articleView?id=managing_the_sharing_model.htm&type=0

Organization-Wide Sharing Defaults

https://help.salesforce.com/articleView?id=security_sharing_owd_about.htm&type=5

Sharing Rules

https://help.salesforce.com/articleView?id=security_about_sharing_rules.htm&type=5

Helpful Links

Passwords

https://help.salesforce.com/articleView?id=security_overview_passwords.htm&type=5

Set Password Policies

https://help.salesforce.com/articleView?id=admin_password.htm&type=0

Expire Passwords for All Users

https://help.salesforce.com/articleView?id=expiring_passwords.htm&type=0

Helpful Links

Modify Session Security Settings
https://help.salesforce.com/articleView?id=admin_sessions.htm&type=0

Session Security
https://help.salesforce.com/articleView?id=security_overview_sessions.htm&type=5

Manage Installed Packages
https://help.salesforce.com/articleView?id=distribution_managing_packages.htm&type=0

View Installed Package Details
https://help.salesforce.com/articleView?id=distribution_package_detail.htm&type=5

Helpful Links

Create Lightning Apps

https://help.salesforce.com/articleView?id=dev_apps_lightning_create.htm&type=5

Salesforce App Considerations

https://help.salesforce.com/articleView?id=dev_apps_considerations.htm&type=5

Lightning Apps

https://help.salesforce.com/articleView?id=dev_apps_lightning.htm&type=5

Create and Edit a Custom Lightning Console App

https://help.salesforce.com/articleView?id=console_lex_create_custom.htm&type=5

Helpful Links

Your Org's Branding in the Salesforce App
https://help.salesforce.com/articleView?id=customize_sf1_branding.htm&type=0

Customize Branding of the Salesforce App
https://help.salesforce.com/articleView?id=customize_sf1_branding_edit.htm&type=5

Salesforce App Navigation Menu
https://help.salesforce.com/articleView?id=sf1_navigation_menu_about.htm&type=5

Helpful Links

Set Up a Custom Report Type

https://help.salesforce.com/articleView?id=reports_report_type_setup.htm&type=0

Create a Custom Report Type

https://help.salesforce.com/articleView?id=reports_defining_report_types.htm&type=5

Add Child Objects To Your Custom Report Type

https://help.salesforce.com/articleView?id=reports_report_type_objects.htm&type=5

Helpful Links

Feed Tracking

https://help.salesforce.com/articleView?id=collab_feed_tracking_overview.htm&type=5

Customize Chatter Feed Tracking

https://help.salesforce.com/articleView?id=collab_feed_tracking.htm&type=5

Chatter Feeds Overview

https://help.salesforce.com/articleView?id=collab_feed_overview.htm&type=5

Helpful Links

Find Object Management Settings in Lightning Experience
https://help.salesforce.com/articleView?id=extend_click_find_objectmgmt_lex.htm&type=5

Create Custom Fields
https://help.salesforce.com/articleView?id=adding_fields.htm&type=5

Page Layouts
https://help.salesforce.com/articleView?id=customize_layout.htm&type=5

Create Record Types
https://help.salesforce.com/articleView?id=creating_record_types.htm&type=5

Compact Layouts
https://help.salesforce.com/articleView?id=compact_layout_overview.htm&type=5

Helpful Links

Validation Rules

https://help.salesforce.com/articleView?id=fields_about_field_validation.htm&type=5

Define Validation Rules

https://help.salesforce.com/articleView?id=fields_defining_field_validation_rules.htm&type=5

Validation Rule Considerations

https://help.salesforce.com/articleView?id=fields_validation_considerations.htm&type=5

Tips for Writing Validation Rules

https://help.salesforce.com/articleView?id=fields_validation_rules_tips.htm&type=5

Trailhead - Create Validation Rules

https://trailhead.salesforce.com/en/modules/point_click_business_logic/units/validation_rules

Helpful Links

Schema Builder

https://help.salesforce.com/articleView?id=schema_builder_working.htm

Schema Builder Custom Object Definition

https://help.salesforce.com/articleView?id=schema_builder_elements_objects_ref.htm

Trailhead – Data Modeling

https://trailhead.salesforce.com/modules/data_modeling

Helpful Links

Process Management
https://help.salesforce.com/articleView?id=schema_builder_working.htm

Create a Process
https://help.salesforce.com/articleView?id=process_create.htm&type=5

Trailhead - Process Automation
https://trailhead.salesforce.com/en/modules/business_process_automation

Helpful Links

Lightning App Builder
https://help.salesforce.com/articleView?id=lightning_app_builder_overview.htm

Build Apps Visually with Lightning App Builder
https://developer.salesforce.com/events/webinars/Lightning-App-Builder

Create an App Home Page with the Lightning App Builder
https://help.salesforce.com/articleView?id=lightning_app_builder_create_app_page.htm

Trailhead - Lightning App Builder
https://trailhead.salesforce.com/en/modules/lightning_app_builder

Helpful Links

Path

https://help.salesforce.com/articleView?id=rss_sales_path.htm

Guide Users with Path

https://help.salesforce.com/articleView?id=path_overview.htm

Trailhead - Path & Workspaces

https://trailhead.salesforce.com/en/modules/sales_admin_optimize_salesforce_for_selling

Helpful Links

Rename Object, Tab, and Field Labels
https://help.salesforce.com/articleView?id=customize_rename.htm

Enable and Disable the Translation Workbench
https://help.salesforce.com/articleView?id=customize_wbench.htm

Translate Terms
https://help.salesforce.com/articleView?id=entering_translated_terms.htm

Translation Files
https://help.salesforce.com/articleView?id=translation_file_description.htm

Exporting & Importing Translation Files
https://help.salesforce.com/articleView?err=1&id=workbench_export.htm
https://help.salesforce.com/articleView?id=workbench_import.htm

Helpful Links

Sandbox Types
https://help.salesforce.com/articleView?id=create_test_instance.htm

Sandbox Licenses and Storage by Type
https://help.salesforce.com/articleView?id=data_sandbox_environments.htm

Trailhead - Application Lifecycle Management
https://trailhead.salesforce.com/modules/alm_deployment

Helpful Links

Change Sets
https://help.salesforce.com/articleView?id=changesets.htm

Change Sets Best Practices
https://help.salesforce.com/articleView?id=changesets_best_practices.htm

Deploy Inbound Change Sets
https://help.salesforce.com/articleView?id=changesets_about_inbound.htm

Upload Outbound Change Sets
https://help.salesforce.com/articleView?id=changesets_about_outbound.htm

Trailhead - Change Management
https://trailhead.salesforce.com/modules/app_deployment

Helpful Links

The System Overview Page

https://help.salesforce.com/articleView?err=1&id=dev_force_com_system_overview_page.htm

The system overview page displays usage for:

- Schema
- API usage
- Business logic
- User interface
- Most used licenses
- Portal roles

Further Links

- System Overview: Schema
- System Overview: API Usage
- System Overview: Business Logic
- System Overview: User Interface
- System Overview: Most Used Licenses
- System Overview: Portal Roles