Chapter 1

Organization and Administration

1. You can Add **Login Hours** and **Login IP Ranges**below to any profile.
    1. Login Hours holds you can access your account with the specified time period.
    2. Login IP Ranges allows only access your account with the specified IP Range.

2. Security Control → Network Access →**Trusted IP Ranges**

If you added Trusted IP Range Users logging in from trusted IP addresses are not asked to activate their computers

3. Verification code only valid up to 24 hours

4. When the user password changed, the Security Token will be automatically reset.

5. **Fiscal Year**:
    1. Standard Fiscal Year
    2. Custom Fiscal Year

- Enabling custom fiscal years is not reversible. After enabling custom fiscal years, you cannot revert to standard fiscal years.
- Custom fiscal year, you cancreate a 13-week quarter represented by three periods of 4, 4, and 5 weeks, insteadof calendar months.

6. **Locale and Time Zone:**

- Individual users can set their own locale which will override the Organization - wide setting
- You can change your desired language.
- Default locale: The default locale setting affects the format of date, date/time, and number fields.
- For example, a given date in the English (United States) locale would appear as 07/27/2012, and in the English (United Kingdom) locale as 27/07/2012.
- Time in the English (United States) locale is displayed using a twelve hour clock with AM and PM (for example, 3:00 PM), whereas in the English (United Kingdom) locale, they display using a twenty-four hour clock (for example, 15:00).
- To set Currency Locale in your organization go to Company Profile → change currency locale.

- If you enable Advanced Currency Management, you cannot create roll-up summaryfields that calculate currency on the opportunity object.

- User Interface having two themes **Classic** and New **User Interface** theme.

- Enabling Collapsible section → collapse the sections.

- Show Quick Create → Used to create Records from the side bar.

- Enable Hover Details → Allow when hover links it will show details of the records

- Enable Related List Hover Links →This option enables related list hover links to be displayed at the top of standardand custom object record detail pages.

- Enable Separate Loading of Related Lists →This option enables the separate loading of record detail pages. First, the primaryrecord detail data loads, and then the related list data. It will indicate like Account [...] when loading data. This option serves to improvethe display performance for organizations with a large number of related listson record detail pages.

- Enable Inline Editing →This option allows users to change field values directly within the record detail pageavoiding the need to load the record edit page first. By double-clicking the field to beedited within the detail page, the field changes to become editable.

- Enable Enhanced Lists →This option provides the user with the ability to view, customize, and edit list data. (i.e. Number of pages, records at the bottom of the page) , creating views

- Mass Edit from Lists(Profile) → Enable Multiple inline record edit in list view, he can edit up to 200 records.The "Mass Edit from Lists" option only appears on the profile,if inline editing is enabled

- Enable Collapsible Sidebar → Show / hide side bars

- Show Custom Sidebar Components on All Pages → it will show custom home page components to all pages.

- Enable Home Page Hover Links for Events → it will show when hover event on the home page.

- Enable Click-and-Create Events on Calendar Views → when double click the calendar date the event will be created.

- Enable Hover Links for My Tasks List → This option will show hover details on tasks.

- Enable Enhanced Profile List Views → This option allows to create views.

- Enable Enhanced Profile User Interface → This allows different user interface.

- Enable Custom Object Truncate → Delete custom object records, parent only having truncate option in a master detail relationship.

- Extended Mail Merge →the mail merge operation cannot exceed 1000records; the selected mail merge template's total size cannot be greaterthan 1 Mbytes, and the number of records multiplied by the combinedsize of the mail merge templates cannot be greater than 50 Mbytes.

- Sidebar Search → You can search objects, fields, settings, etc. from the side bar search.

- Advanced Search → You can search all records from sidebar, user don't have the permission can't able to search that particular records. It mainly used for portal access.

- If Global Searchis enabled, Sidebar Search and Advanced Search are disabled. Search terms are not case-sensitive

- If you are searching brown* from the sidebar search, it will return all which starting of brown. It will result like browning, browner, etc.

- Search Setting → You have a Lookup setting for Enhanced lookup and Lookup Auto completion.

- Limit to Items I Own →findonly the records of which they are the record

- Enable Document Content Search → It can search document through global search.

- Number of Search Results Displayed Per Object → 5 to 50

- Delegated Administration → Allows you to select and add the users.

- User Administration→Allows you to select and add roles.

- Assignable Profiles→Allows you to select and add profiles, Profiles with the permission "Modify All Data" cannot be assigned by delegated administrators.

- Minimum Password Length →The options are five characters, eight characters, or ten characters.

- Password Complexity →The options are No Restriction and must mix alpha and numeric.

- Login Attempts →No limit, 3, 5, and 10.

- Lockout Period →The options are 15 minutes, 30 minutes,60 minutes, and Forever (must be reset by admin).

Chapter 2

User Management in Salesforce

- Record Owner → Only users that are active in Salesforce can have records assigned to them.When a user is marked inactive in Salesforce CRM, he/she no longer has access tothe application. However, any records that this inactive user owns remain in theapplication and continue to show the inactive user as the record owner

- Profile → Profiles never override your organization's sharing model or role hierarchy. There are 6 profile types.

- Sharing→

  - Controlled by Parent
  - Private
  - Public Read Only
  - Public Read/Write
  - Public Read/Write/Transfer
  - Public Full Access
  - Grant Access Using Hierarchies

- Grand Access using Hierarchies →Users in higher roles in thehierarchy will have full access (view/edit/delete) to all records owned by those at alower level in the role hierarchy. If grant access not enabled means all roles will be same.

- Grant Access Using Hierarchies is only applicable for custom objects since they cannot be disabled for standard objects.

- Roles →You can create up to 500 roles for your organization.

- Permission sets → Permission sets allow you to further control access to the system for the users in yourOrganization. It allow you to grant further access but not to restrict or deny access.You can create up to 1,000 permission sets for your organization

Chapter 3

Configuration in Salesforce CRM

- Custom Field Help Text →Both standard and custom fields can be customized to include custom help text tohelp users understand how to use the field.
- A custom app can optionally include a custom logo.
- Tab→Visualforce tab, Custom object tab, web tab
- Rename standard tab, fields, object → Go to Rename Tabs and Labels. Some standard fields, such as Created By and Last ModifiedBy, are prevented from being renamed because they are auditfields that are used to track system information.
- Custom Object →You can create up to 200 custom objects in the EnterpriseEdition and 2000 in the Unlimited Edition.
- Master detail relationship →The Roll-Up Summary option is onlyavailable for objects defined as Master in master-detail relation.As a best practice, salesforce.com recommends that you donot exceed 10,000 child records for a master-detail relationship
- Auto Number Field → Maximum length is 30 characters, of which 20 are reserved for further Prefix or suffix text that you can specify.
- Hierarchical Relationship →Forthe user hierarchical relationship, users can use a lookup field to associate one userwith another. You can create this relationship in User object only.
- Picklist and Multi-select Picklist→Maximum length of text value in 255.
- Text Encrypted → 175 Character is the maximum length.
- Depended picklist→Controlling fields can be any picklist orcheckbox field within the same record.
- Multi-select picklistscan be picklists but notcontrolling fields
- Standard picklistfields can be controlling fields but notdependent fields.
- The maximum number of values allowed in a controlling field is 300.
- Checkbox fields can be controlling fields but not dependent fields.
- Lookup Relationship →Don't allow deletion of the lookup record that's part of alookup relationship.

- Formula Field →There is a text character and byte size limit of 3,900 characters, and a limit of 5,000characters for the compiled characters for formulas.

- Field History Tracking →Field history tracking can be applied on certain custom and standard fields forcustom objects and the following core standard objects: Accounts, Cases, Contacts,Contracts, Leads, and Opportunities

- Field history data does not count against your organization's storage limit.

- Record Type →

    - Lead : Lead Process (Status Field)
    - Opportunity : Salesforce Process (Stage Field)
    - Case : Support Process (Status Field)
    - Solution : Solution Process (Status Field)

- List View, Related List field arrangements.

- Force.com Quick Access Menu → To enable this go to User → Edit →Force.com Quick Access Menu

Chapter 4

Data Management

- Profile → OWD → Role → Sharing Rule → Groups or Queue → Manual Sharing or Criteria Based Sharing

- Public Full Access (Campaigns only) →All users can view, edit, transfer, delete, and report on all Campaign records.

- Public Read/Write/Transfer (Cases or Leads only)→all users can view, edit, transfer, and report on allCase or Lead records.

- Public Read/Write→All users can view, edit, and report on all records.

- Public Read Only →All users can view and report on records but they cannot edit them.

- Private →Only the record owner and users above that role in the hierarchy can view, edit, andreport on those records.

- No Access, View Only, or Use (Price Book only) →Use is the default access level and allows all users to access the Price Bookinformation as well as using the Price Book configuration for opportunities withproducts. View only allows users to access Price Book information but not to usethat Price Book detail in opportunities with products. No Access restricts users fromaccessing information for Price Books and Prices.

- When Controlled by Parent is set on an object a user can perform an action (suchas view, edit, or delete) on the record based on whether they can perform that sameaction on the parent record associated with it.Tasks and Events are by default set to Private

- The Organization-wide default for the Solution object in Salesforce ispreset to Public Read/Write which cannot be changed.

- Permission Set →You can create up to 1,000 permission sets for your organization.

- Roles →You can create up to 500 roles for your organization.

- Grant access login permission→its avail under sharing setting.

- Sharing Rule → Sharing rule apply for record level access.It apply to:
  • All new and existing records owned by the specified role or group members
  • Both active and inactive users

- Sharing Conditions→

  - Rule Type :
    - 1. Based on record owner
    - 2. Based on criteria

- If these changes affect too many records at once, a message appears warning that the sharing rules will not be automatically re-evaluated, and you must manually recalculate them.

- If you are writing sharing rule means, make sure profile doesn't contain modify all, view all permission and OWD for the particular object is private. Once sharing rule is created with some shared group or role, you can't modify that role or group.

- Recalculate in Sharing Rule→you don't have to recalculate each time you edit or create a new sharing rule. The Recalculate buttons on the Sharing Rules related lists should only be used if sharing rule updates have failed or are not working as expected. Administrators will receive a notification email if sharing rule updates have failed.

- Criteria-based sharing rule with text fields→to create a criteria-based sharing rule that matches with severalcases of a word, enter each value separated by a comma. For example International, international and use the Contains operator.

- Criteria-based sharing rule limitation→Up to 50 criteria-based sharing rules can be created per object. You can't share records to particular users.

- Manual Sharing→You can share records by manually by selecting Sharing button.The Sharing button does not appear if the object's Organization-widesharing defaults are set to Public Read/Write.

- Opportunity object Clone → When you clone the opportunity record that have product to the particular opportunity , Clone with Products and Clone without Products

- Controlling fields →
  - Checkbox fields can be controlling fields
  - Multi-select picklists cannot be controlling fields
  - There are maximum number of 300 values allowed in a controlling field

- Dependent fields →
  - Multi-select picklists can be dependent picklists
  - Checkboxes cannot be dependent fields.

- Standard picklist fields → it cannot be defined as a dependent list. They may only be setup as a controlling field.

- Default Value→You can set default values for controlling fields but not for dependent picklists.

- Assignment Rule → You can assign custom object records to queue members, but not for standard objects.

- Importing Data →The import wizards do not consider field dependencies. Therefore, any value canbe imported into a dependent picklist field regardless of the value imported for acontrolling field.

Chapter 5

Data Analytics with Reports And Dashboards

- Folder →Restrict by Public Groups, Roles, and Roles and Subordinates.
- Create Report Folder→The user permission required to access the CreateNew Folder option is Manage Public Reports.
- Delete Report Permission →Only users with the Manage Public Reports user permission areable to delete reports from the report folders
- Custom Report Type → System admin only create custom report type.
- Standard report folder →by default, the standard report folders are set toread-only and are accessible by all users.
- Administrative reports →which can be found in the Administrative Reports folder,and can be used to analyze your Salesforce users' documents, reports, and loginlocations.
  - API Usage in Last 7 days
  - All active users
  - All pending approval request
  - Documents
  - User logged in this week
- Custom Report Type Template→When a Custom Report Type template is saved, theprimary object associated with it cannot be changed.
- Report Type Label →The Report Type Label field can be up to 50 characters long and thedescription can be up to 255 characters.
- Account Transfer →
  - Transfer open opportunities not owned by the existing account owner
  - Any notes that belong to the existing owner.
  - All contacts that belong to the existing owner.
  - Transfer closed opportunities
  - Transfer open cases owned by the existing account owner
  - Transfer closed cases
  - All open activities assigned to the existing owner. Note that completed activities will not be transferred.
  - All opportunities (including closed opportunities if you select the Transfer closed opportunities checkbox below) that belong to the existing owner.
  - The new owner might need to edit sharing.

- Custom Report Type:
  - Fields→You can add up to 1000 fields to each Custom Report Type template
  - Rename →You can rename field label by selecting particular field and edit. If you want to make that field as default select "Checked by Default".

- Deleting Reports→You cannot delete reports that are being used by dashboards. To deletethese reports, you must first delete the calling dashboard component.

- Export Report →Up to 256 columns and 65,536 rows ofdata can be exported from a report.

- Report Timeout Period →The standard timeout for reports is 10 minutes.You can have the timeout period for reports extendedfrom the default 10 minutes by sending a request toSalesforce customer support.

- Report and Dashboard(User Interface)→

  - Enable Floating Report Headers→Floating report headers keep the column headings on tabular reports in sight no matter how far users scroll down report results. With floating report headers, users can scroll to the bottom of lengthy tabular reports without having to scroll back to the top to view the names of the column headings.

  - Dashboard finder →uses auto-complete to help users quickly find dashboards in the Dashboards tab. This option is enabled by default.

  - Report timeout warning →the report timeout warning only analyzes reports run manually from the Run Reports page. It doesn't analyze scheduled reports, reports run from dashboards, or reports run using background export.

- Report Builder→Fields, Filters, and Preview panes are available in Report builder.

- Caution while saving report →you can also click on the Salesforce.com logo in the top-left corner of the page. However, you will not be prompted to save any changes.

- Report Formats →

  - Tabular:Tabular reports are most suited for creating lists of records or a list witha single grand total as they cannot be used to group data.

  - Tabular reports cannot be used in dashboards unlessthe number of rows that are returned are limited.

  - Summary Reports: Summary reports are similar to tabular reports except that they allow the groupingof rows of data.

  - Summary reports can be used as the source reportfor dashboard components.

- Matrix Reports: Matrix reports are similar to summary reports, but they also allow the groupingand summarizing of data by both rows and columns and can be used for comparingrelated totals.

- Joined Reports: Joined reports are reports that can store and group multiple reports together andallow you to build a single report that contains data from multiple report types.

- The following features are not available in joined reports:Bucket fields, Cross filters, and The Rows to Display filters.

- Grouping Level:

  1. Summary reports can have up to three grouping levels.
  2. Matrix reports can have two row and two column groupings. Youcannot use the same field for both the row and the column groupings.
  3. Joined reports can have up to three grouping levels.

- Conditional Highlighting → To enable conditional highlighting, your report must contain at least one summary field or custom summary formula.

- Custom Summary Formula Field→Formulas must be 3,900 characters or less. Up to five formulas can be created perreport.

- Bucket fields →allow you to categorize values based on fields available in the reporttype.Fields available as Bucket fields are Number,Percent, and Currency, Pick list, and text fields.

- Dashboard →Dashboards can have up to 20 components. A more flexible and dynamic approach, however, allows you to set the running userto be the logged-in user, so that each user is presented with the dashboard accordingto their own data access level. This is known as dynamic dashboards.

- 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 personal security settings

- Run as logged-in user → adynamic dashboard runs using the security settings of the user viewing the dashboard. Each user sees the dashboard according to his or her own access level.

- Let authorized users change running user → you can view dashboard by selecting users.

- Adding Column in Dashboard →Click on + to add a new column. Dashboards can have up to three columns.Dashboards must have at least two columns.

- To set the width for the column, you can select either, Narrow, Medium, orWide in the column width drop-down list.

- Component Level Control →Each folder can display up to 200 data sources. However, if There are more than 200, you can use the Quick Find optionor set filters to reduce the displayed list.

Chapter 6

ImplementingBusiness Processes

In Salesforce CRM

- Workflow and approval actions consist of e-mail alerts, tasks, field updates, and Outbound messages that can be triggered either by a workflow rule or by an Approval process.

- Email Template Name→The unique name for the e-mail alert is required and used by The API and managed packages.Also, the unique name cannot end with an Underscore nor have two consecutive underscores.

- Protected Component →The Protected Component checkbox is used to mark the alert as Protected. This option can be ignored as it is a setting used by developerswho are building applications with the "managed release" packagefunctionality. If you install a managed package, there are restrictions onwhat can be edited by non-developers

- Email Recipients → Account Owner, Account Team, Case Team, Creator, Customer Portal User, Email field, Owner, Partner User, Partner Role, Partner role and subordinates, Public groups, Related Contacts, Related Lead or Contact Owner, Related User, Role, Role and Internal Subordinates, Role and Subordinates, Users, Sales team.

- Account Team → You can create account team in the Account selection. After enabled account team you can add team members below to any one accounts.Account Access, Opportunity Access, Case Access, Team Role are available when adding account team members.

- Case Team → Define a Case team role and add predefined case team(i.e. team members). After enabled case team drag and drop from the case layout.

- Related User →A Related User is a user lookup field that is associated to the record. As an example, this field may be set to the Last Modified byfield.

- Role and Subordinates→All roles defined for your organization. This includes all of the users in the specified role plus all of the users in roles below that role, including partner portal and Customer Portal roles that contain users with a portal license type.

- Role and InternalSubordinates→all roles defined for your organization. This includes all of the users in the specified role plus all of the users in roles below that role, excluding partner portal and Customer Portal roles.

- From Email address change(Email Template) → Go to Organization-Wide Email Addresses and add your email then verify.

- Email Alert Limit→There is a daily limit of 1,000 e-mail alerts per standard Salesforce license forworkflows and approvals.

- A Blank value Null (Field Update) →This option is not available for required fields, checkboxes, and someother types of fields.

- Workflow evaluation criteria →Created, created, and every time it's edited(You cannot add time-dependent workflow actions with this option), created, and any time it's edited to subsequently meet criteria.

- Workflow Rule Consideration →

  - Workflow rules on custom objects are automatically deleted if the customobject is deleted.
  - The order in which actions are executed is not guaranteed. Field updateactions are executed first, followed by other actions.
  - Time-dependent field updates can retrigger the re-evaluation ofworkflow rules.

- Cross Object field update →Cross-object field updates only work for custom-to-custom master-detailrelationships.

- Approval Process →

  - Workflows can be modified or deleted. In approvals, some attributes cannotbe modified, and approval processes must be deactivated before outstandingapprovals can be deleted.

  - Approval processes result in the approval history being automaticallytracked, which is not applied to workflow rules.

  - When an approval is initiated, the record is "locked down" and cannot bechanged by someone other than the approver or system administrator untilthe record has completed the approval process.

  - When submission the system admin only edit the locked down records, to change this go to Approval Field and Record Edibility.

- Approval Process Steps →
  1. Initial Submission Actions
  2. Approval Steps
  3. Final Approval Actions
  4. Final Rejection Actions
  5. Recall Action

- Jump Start Wizard is provided as a quick way to create simple approval processesthat have a single step.

- Standard Setup Wizard enables the creation of complex approval processes, andis used where multiple processing steps are required.

- Approval Steps Limit→For both Enterprise and Unlimited Editions,there is a limit of 15 steps per process.

- Approval Member Limit →For both Enterprise and Unlimited Editions, eachapproval step can have up to 25 approvers.

- Delegated Approvers→Delegated approvers cannot reassign approval requests, and theyare only permitted to approve or reject approval requests.

- Rejection Behavior →

  - Perform all rejection actions for this step AND all final rejection actions. (Final Rejection)
  - Perform ONLY the rejection actions for this step and send the approval request back to the most recent approver. (Go Back 1 Step)

- Visual Workflow →

  - Visual Workflow allows you to build collections of screens, which are known asflows, to guide users through the process of collecting and updating data.

  - The Palette tab lists all the element types available for the flow. Here you candrag-and-drop elements from the Palette onto the Canvas to configure them.

  - The Resources tab lets you create new resources for the flow, like variables,constants, formulas, and so on. Once created, the new resources will appearin the Explorer tab.

  - The Explorer tab is a library of all the elements and resources that have beencreated for the flow.

  - Each flow can have up to 50 versions.

  - You can update the flow name and description when you save anew version, but not the unique name.

Chapter 7

Salesforce CRM Functions

- Marketing Administration(Campaign)→ Marketing or Sales(Leads)

  - Marketing administration is available in Salesforce CRM under the application suite known as the Marketing Cloud.
  - The features in the marketing application can help measure the effectiveness of each campaign by analyzing the leads and opportunities generated as a result of specific marketing activities.

- Salesforce Automation(Account , contact, opportunities)→Salesforce automation is known as theSales Cloud and helps salespeople manage sales activities, leads and contact records,opportunities, quotes, and forecasts. Customer Acquisition (Sales – won)

- Customer service and support automation(cases)→using the Service Cloud features, organizations can handle customer requests such as the return of faulty goods or repairs, complaints, or provide advice about products and services.

- Enterprise social networking →In Salesforce CRM, the enterprise social networksuite is known as Salesforce Chatter.

- The Marketing User License is available as standard fororganizations with Enterprise or Unlimited editions andcan be applied to any active user.

- Campaign Management →

  - Campaign planning

    - Before starting to build and run campaigns, it is useful to have an overall plan of The goals and objectives of the campaign, such as the core processes and the type of Campaign, such as mass marketing e-mails, hosting a conference, sending direct mail,and so on

  - Campaign setup

    - To create, edit, and delete campaigns and configureadvanced campaign setup, users must have theMarketing User license checked on their user record

  - Campaign creation

    - Once campaign created you can add Campaign member i.e. Contacts, Leads.
    - Member status values:Sent and Responded.
    - Non-system administrator users can, however, overwrite the status values (for the Specific campaign record only) from within the campaign detail page by clicking on The Advanced Setup button.

- Campaign execution
- Campaign responses
- Campaign effectiveness
  - Campaign effectiveness can be analyzed using either the statistics on the campaign Record or by running campaign reports.

- Campaign Influences →

  - Because opportunities are usually influenced by more than one campaign, the campaign influence feature allows you to manually or automatically associate multiple influential campaigns to a single opportunity.

  - To ensure existing opportunities are included in the results for the campaign, youcan add the campaign to the Campaign Influence related list on the opportunity.

  - By setting the Primary Campaign Source flag (a checkbox on the CampaignInfluence record), the opportunity amount is included in the campaign statistics and reports.

- Campaign Statics →The summary fields on the Campaign Detail page as shown next allows variousstatistics to be seen, such as the total number of responses, the amount of business Generated from the campaign, and so on.

- Lead Assignment →Go to Lead Assignment → create rule with condition, if condition satisfied lead can be assigned to user, queue or Partner Users →once lead accepted the owner will be changed. Only one assignment rule will be active.

- Lead Conversion →

  - The company name from the lead becomes the account name

  - The lead name from the lead becomes the contact name

- Account Management →

  - Reassigning Account owner: Transfer closed opportunity, open opportunity and closed case and Open cases, Keep account team, send notification email.

- Cloud Scheduler→ Go to Cloud scheduler from activities, then add or remove New Meeting Request button from the layout. Then go to activities setting enable Show Requested Meetings in the Calendar Section on the Home Tab.It's available in Contact or Lead Object related list and home tab. Lead or contact record must have an email address.

- Email-to-Case →Create case based on email. You need to verify routing address in order to work on email to case.

- Web-to-Case →The Web-To-Case feature can be used togenerate up to 500 new cases a day.

- Assignment Rule Criteria →Only one case assignment rule can be active at any one time, and each rule cancontain multiple criteria, up to a maximum of 25 criteria.

- For each escalation rule you can specify up to five actions, to escalate thecase over increasing periods of time.

- Escalation times are set →

  - Based on when the case is created
  - Based on when the case is created, and disable after the case is first modified
  - Based on last modification time of the case

- Business hours for escalation rule →

  - Ignore business hours
  - Use business hours specified on case
  - Set business hour

- Chat Setting →

  - Rich Link Previews in Feed →Show rich content in the feed. Convert links in posts into embedded videos, images, and article previews

  - Approval Post →By enabling this option users can approveany business process from within their Chatter feed.Allow users to receive approval requests as posts.

  - Allow Coworker Invitation →

    - Check the Allow Coworker Invitations checkbox to enable everyone in yourcompany to access Chatter.This allows all colleagues, even those who do not have Salesforce licenses to collaborate using Salesforce Chatter.

    - Invited users can access Chatter people, profiles, groups, and files but cannot access Salesforce records unless they have a Salesforce license

    - You can add a maximum of 200 domains. If you add domain like metasts.com, you can invite your co-workers with ending metasts.com.

    - As security, the Allow Coworker Invitations checkbox willnot be activated if the domain is a free e-mail provider suchas yahoo.com, gmail.com, and so on.

- Feed Tracking →When you enable feed tracking, users will see updates for the objects and recordsthat they follow in their Chatter feed.

- Chatter Setting→In the Visual force Settings section, check the Allow checkbox to permit developer and administrators to include the Chat widget within custom Visual force pages.

- Chatter Influence →This setting allows you to control how much activity users must have before they are included in influence-level calculations.

Chapter 8

Extending Salesforce CRM

- Mash up→A mash up is a general term that is commonly used to describe the merging of Functionality and content from multiple sources.(Different sources)

- Mash up Types→Client side mash up and Server side mash up(This uses a Web services) are available.

- Client-side services mashups→ Similar to server-side mashups, client-side services mashups can also be used to call web services or consume websites and feeds.

  - Client-side services mashups require more complex programming than client-side presentationmashups, and typically rely on the technologies associated with web services.

- Client-side presentation mashups→Client-side presentation mashups are the least complex mashups, and can be composed relatively quickly.

- Visualforce Pages →The maximum size of a Visualforce page cannot be greater than 15 MB.

Chapter 9

Best Practices for Enhancing Productivity

- App-Exchange→This chapter contains app exchange, package installation, package best practices.

Extra Tips:

The user listed in the Case History related list for automated case changes from:

- Assignment rules
- Escalation rules
- On-Demand Email-to-Case
- Cases logged in the Self-Service portal

1. Enabling Opportunity team →

- ❖ Team members' access level for this opportunity may be greater than your organization's default opportunity access settings.
- ❖ You can define default Opportunity by team → to set this go to User→ Under user related list default opportunity team will available.
- ❖ Automatically add my default opportunity team to opportunities that I create or open opportunities that are transferred to me (This used to assign default opportunity team).
- ❖ Update open opportunity teams with these members(update existing opportunity team)
- ❖ For this scenario we cannot add default team for **Closed Won**and **Closed Lost** Stages.
- ❖ Once team selling is enabled, you will be able to add custom fields, custom button and links, validation rules, and Apex triggers to opportunity teams. Custom page layouts will also be available for opportunity teams.

2. Data Import Consideration: (I) Identify owners (ii) Removing duplicates before import

3. Custom Summary Formula → once any one field is grouped in report we can use custom summary formula. We can summary all number fields. If no number field in you object means we can use Record Count.

4. No more than 10 fields can be added to a search layout.

Similar Opportunities:

- ❖ Once similar opportunities enable select Match Criteria and Display Similar Opportunities
- ❖ Then add similar opportunities in the opportunity related list.
- ❖ Once you click find and added those opportunity as a bookmark it will added into the similar opportunity related list.

Update Remainder (Opportunities):

- Opportunity Update Reminders are automatically created nightly for users with direct reports in the role hierarchy. Users with newly added direct report(s) may need to wait up to 24 hours before having a reminder available to activate.

Create roll-up summary fields on:

- Any custom object that is on the master side of a master-detail relationship
- Any standard object that is on the master side of a master-detail relationship with a custom object
- Opportunities using the values of opportunity products related to the opportunity
- Accounts using the values of related opportunities
- Campaigns using campaign member status or the values of campaign member custom fields
- For opportunity you can create roll up summary field for Quotes and Opportunity Product.
- For Account you can create roll up summary field for Entitlementsand Opportunity.
- Under User records contains Personal Group, Public group membership, Queue membership, Manage in the role hierarchy.
- Object cannot be query and Not available in reports if Tab is not created for the particular object.
- In chatter you can bookmark for the post, if you bookmarked the particular post then you will receive the notification in email when someone commented that post
- OWD for Price book: No Access, View Only, Use.
- OWD for Account: Private, Public Read Only, Public Read/Write.