Getting Started with SalesForce CRM

Getting Started with SALESFORCE Part XII

Description:

BISP is committed to provide BEST learning material to the beginners and advance learners. In the same series, we have prepared a complete end-to end Hands-on Beginner's Guide for SalesForce. The document focuses on How Approval process works, Alert mechanism, SalesForce Reports and Dashboards. Join our professional training program and learn from experts.

History:

Version	Description Change	Author	Publish Date
0.1	Initial Draft	Chandra Prakash Sharma	10th Jan 2012
0.1	Review#1	Amit Sharma	10th Jan 2012

Contents

Approval Processes:-

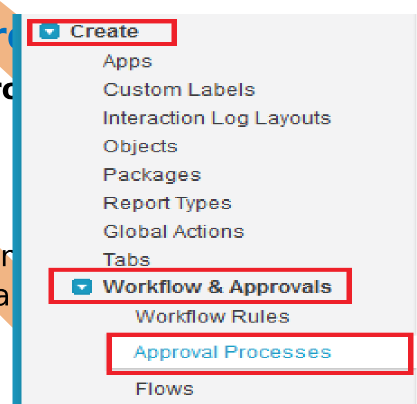
Another business logic engine of SalesForce to automate approval process. Approvals take automation one step further, allowing you to specify a sequence of steps that are required to approve a record. An approval process is an automated process your organization can use to approve records in SalesForce. An approval process specifies the steps necessary for a record to be approved and who must approve it at each step. A step can apply to all records included in the process, or just records that meet certain administrator-defined criteria. An approval process also specifies the actions to take when a record is approved, rejected, recalled, or first submitted for approval.

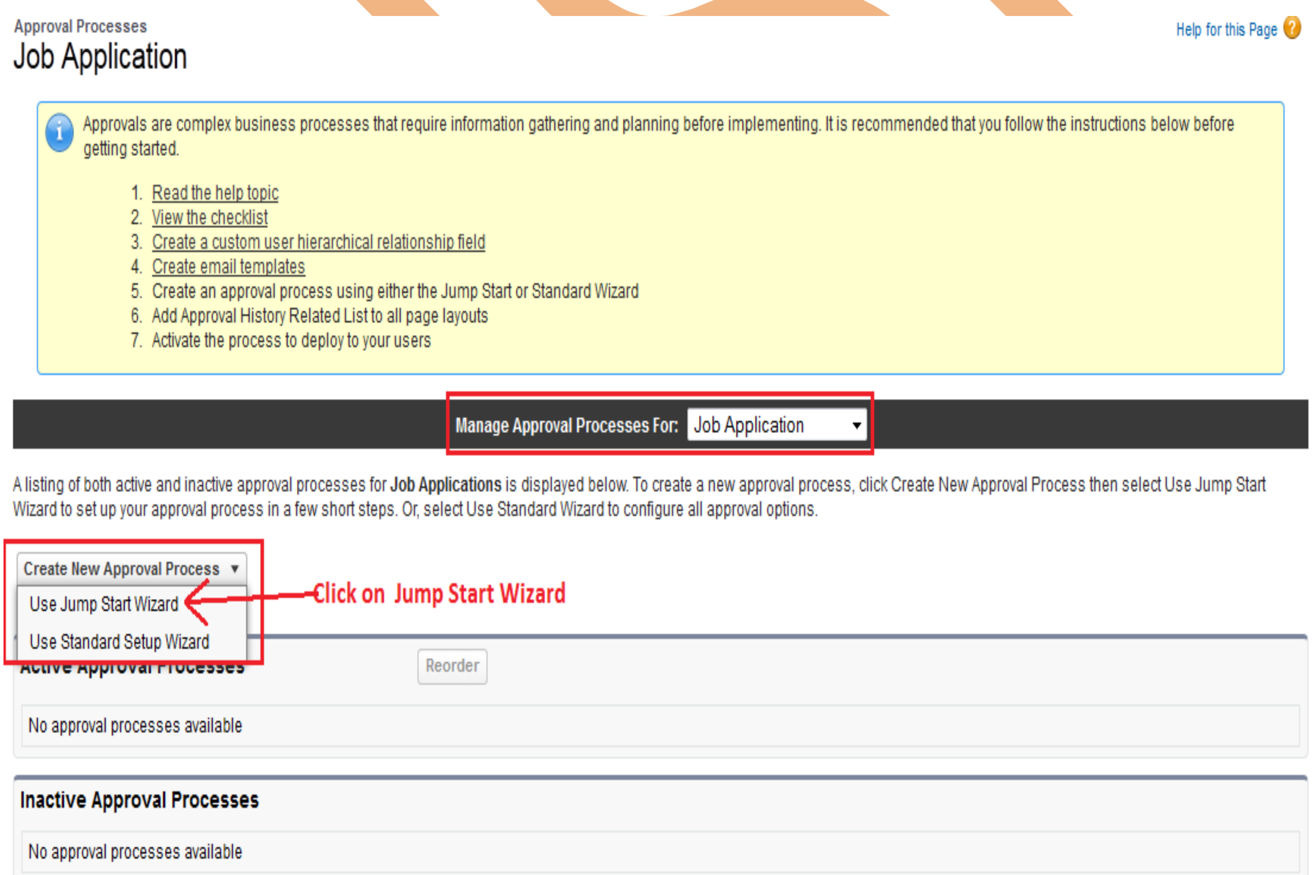
How to Launch the Approval Process Wizar

Setup > **Create** > **Workflow & Approvals** > **Approval Pro**

Step 1:-

After Click on Approval process link then
Choose the object for the new approval process.
Click Create New Approval Process there is two option Use Jur
Wizard and Use Standard Wizard You can choose Use Standa
Wizard from the drop-down button.



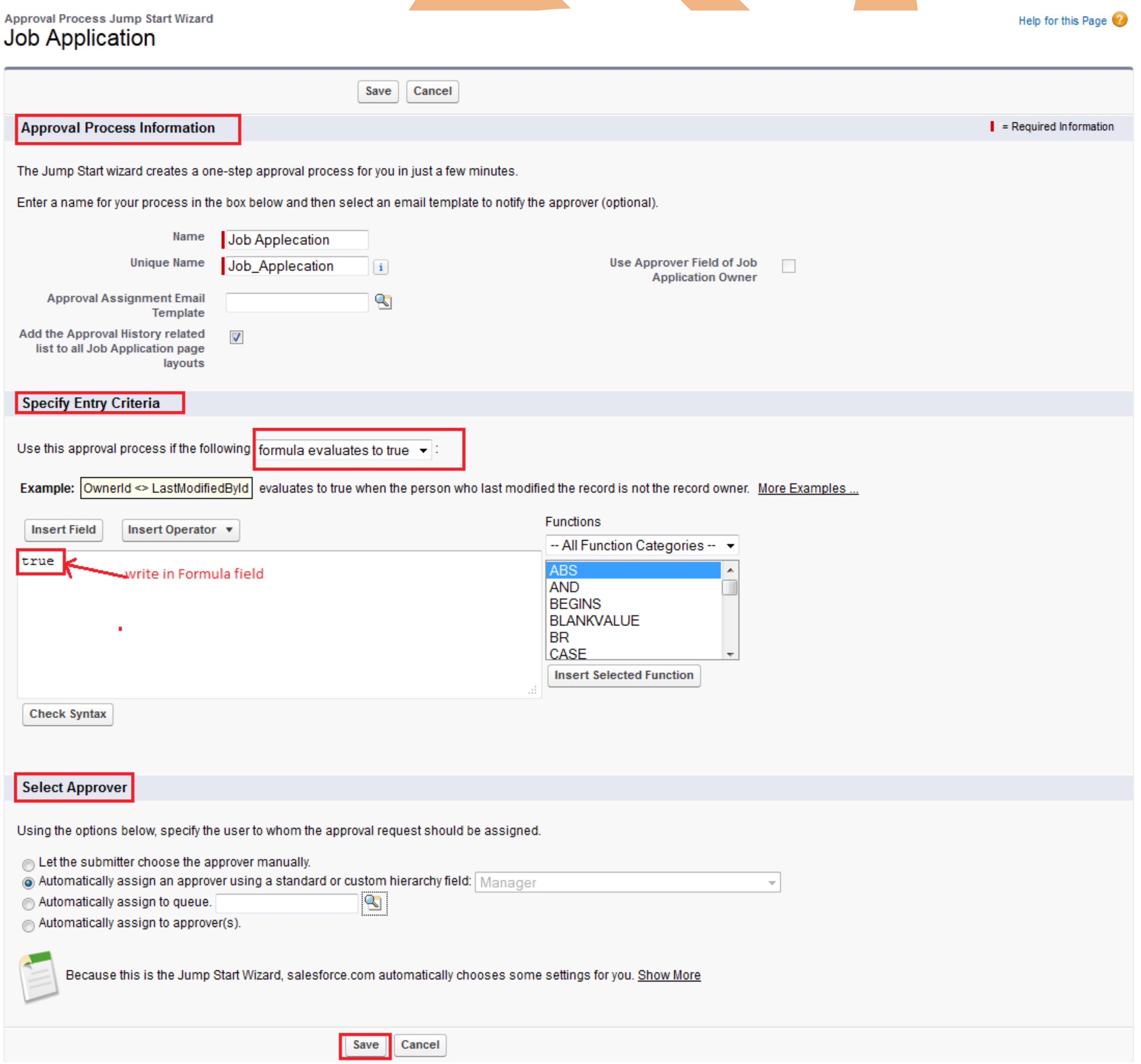


Deference Between Jump Start Wizard and Standard Approval Process Wizard

Jump Start Wizard	Standard Approval Process Wizard
The jump start wizard is useful for simple approval processes with a single step	Standard Approval Process Wizard supports multiple approval steps or complex approval processes.
Many steps are skipped.	All the steps all included.
Use the jump start wizard if you want to create an approval process quickly by allowing SalesForce to automatically choose some default options for you	Use it when you want to fine tune the steps in your approval process

Step 2:-

After click Jump Wizard :

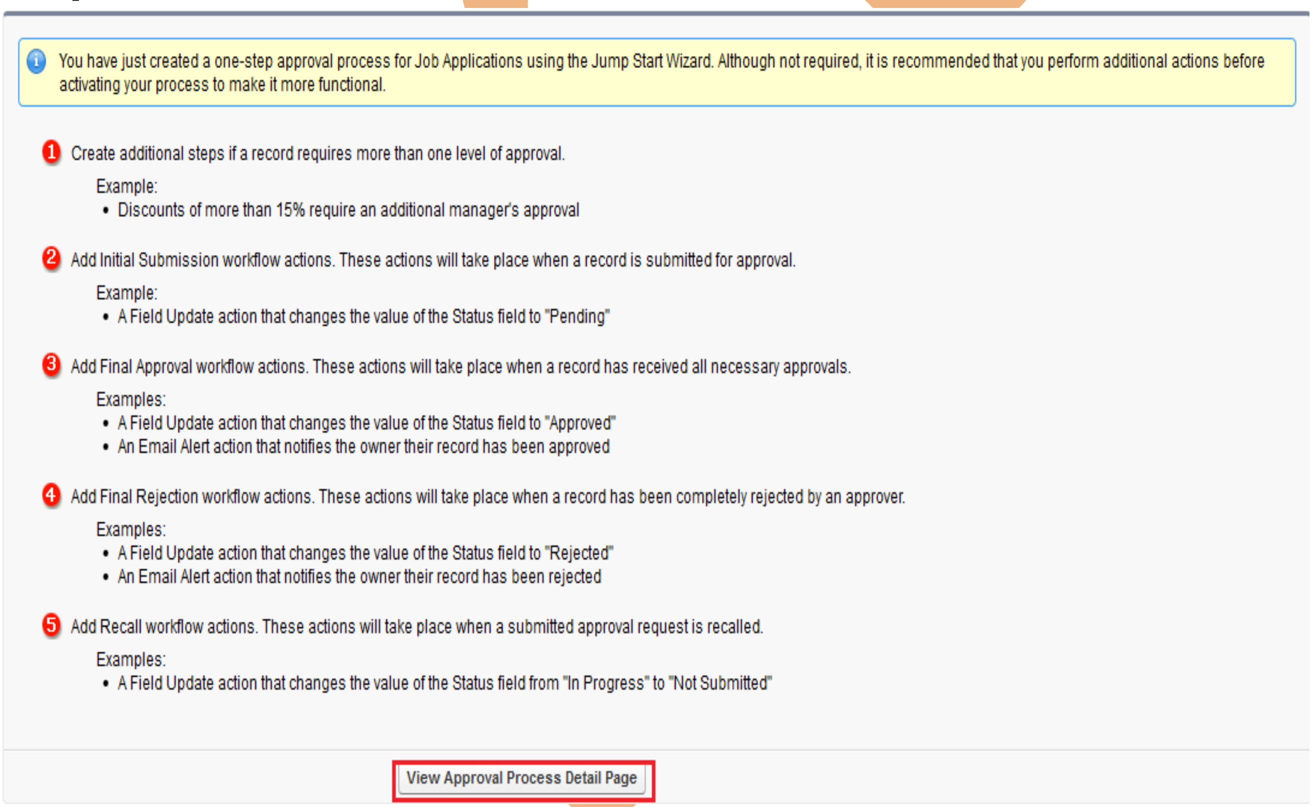


Approval Process Information :
Enter a name for the new approval process.
Enter a unique name, which will be used to refer to this approval process in the Force.com API.
Enter Approval Assignment Email Template this field not mandatory.

Specify Entry Criteria :
Select on in drop down menu approval process.
Criteria are .
Formula evaluates to true.

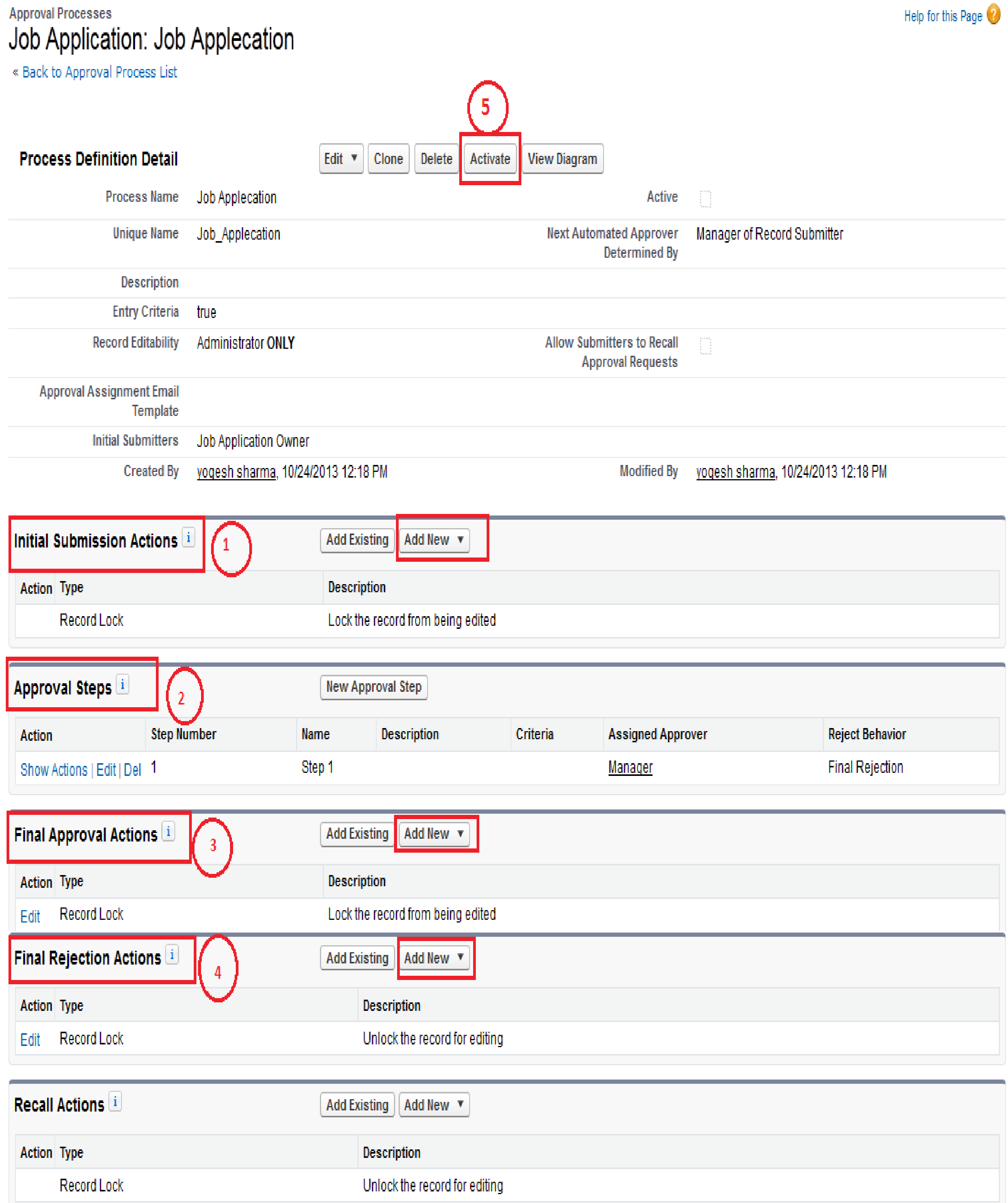
Select Approver :
Using the option select any one option (Ex : Automatically assign an approver using standard or custom hierarchy field.
After that click on **Save** button.

Step 3:-

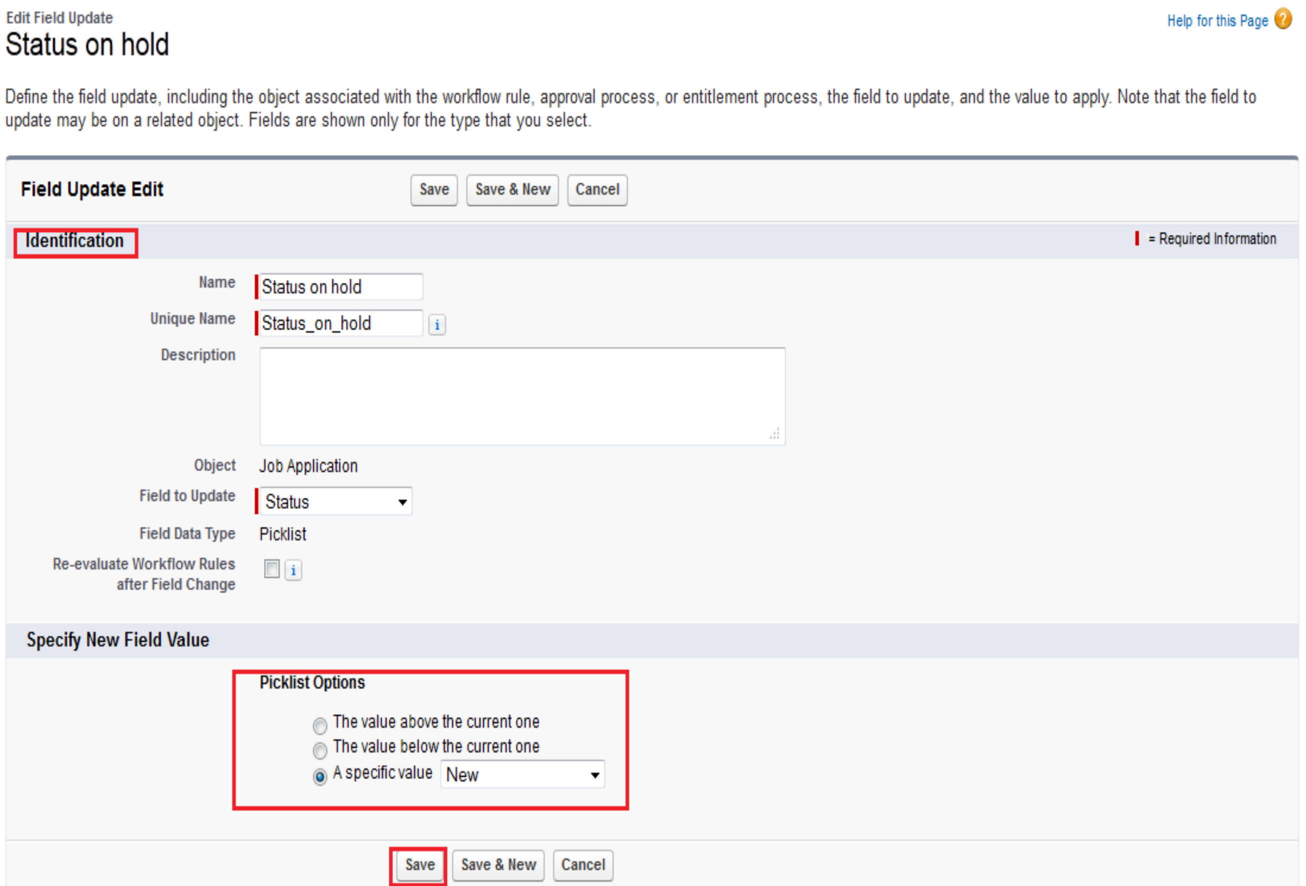


Then click on **View Approval Process Detail Page .**

Step 4 :-

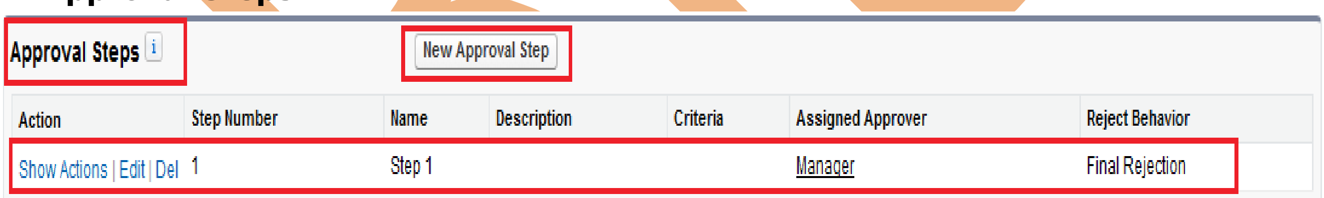


1. Initial Submission Actions : click on Add new button open in dropdown four option Task, Email Alert, field Update, Outbound Message. select any one option. (Ex : Field Update).



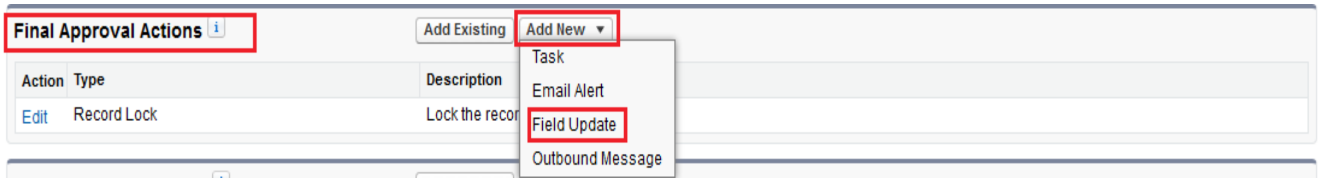
Fill All Mandatory field's in Identification and select Specify New Value select in picklist option . Then click on **Save** button.

2. Approval Steps :

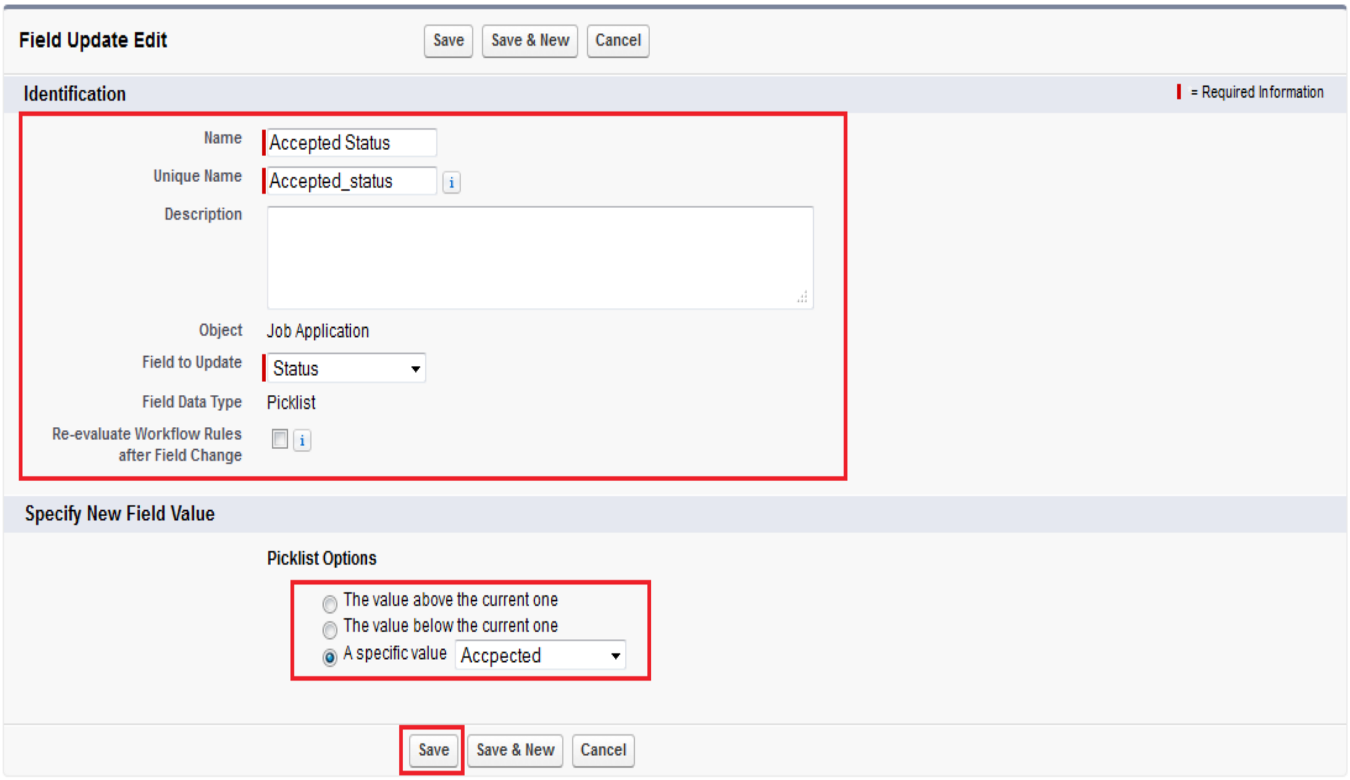


You can give approval setting by using Approval Steps, there is who can approve. and all so add multiple Approval candidate by click New Approval Step.
(Ex: I will Assign Approver authority give on Manager.)

3. Final Approval Actions :



Final Approval Actions There is two button **Add Exiting**, and **Add New** button click on **Add New** button, click on Field Update in dropdown list.



Fill All Mandatory field's in Identification and select Specify New Value select in picklist option . Then click on **Save** button.

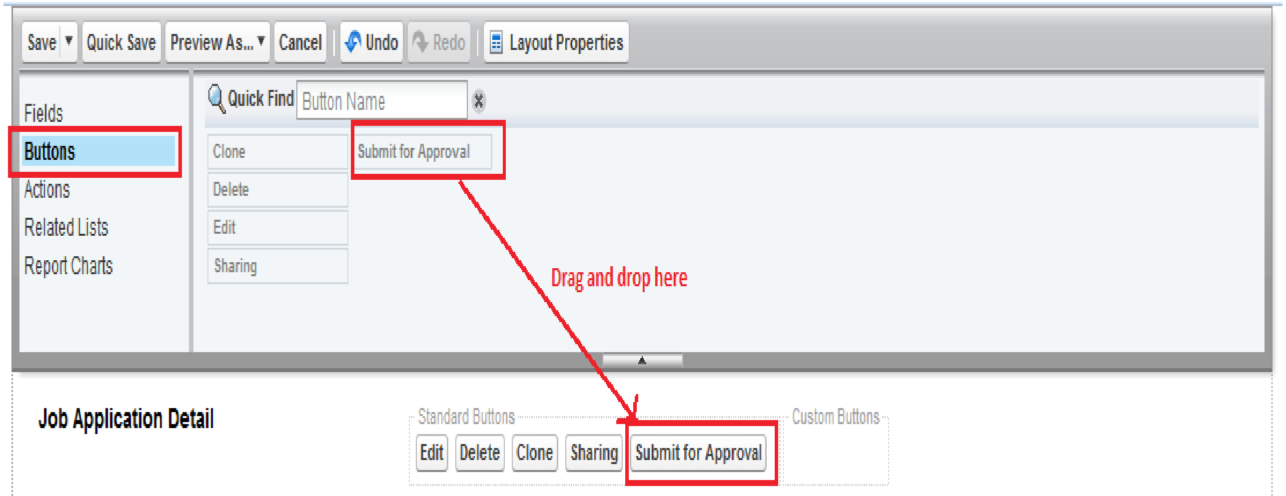
4. Final Rejection Actions :
All kind of step last step.

5. Click on Active Button :
finish all steps then click on Active button for active this Approval Process.

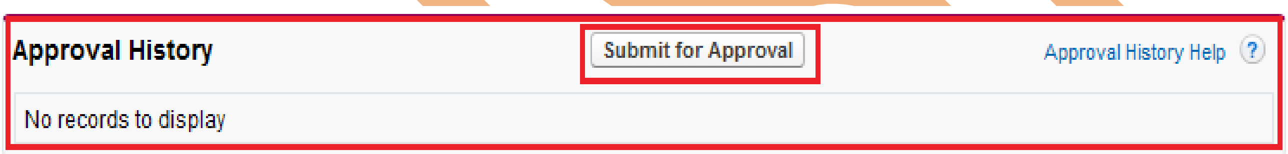
Step 5 :-

After that you need set page layout in Custom object (Ex: Job applications)

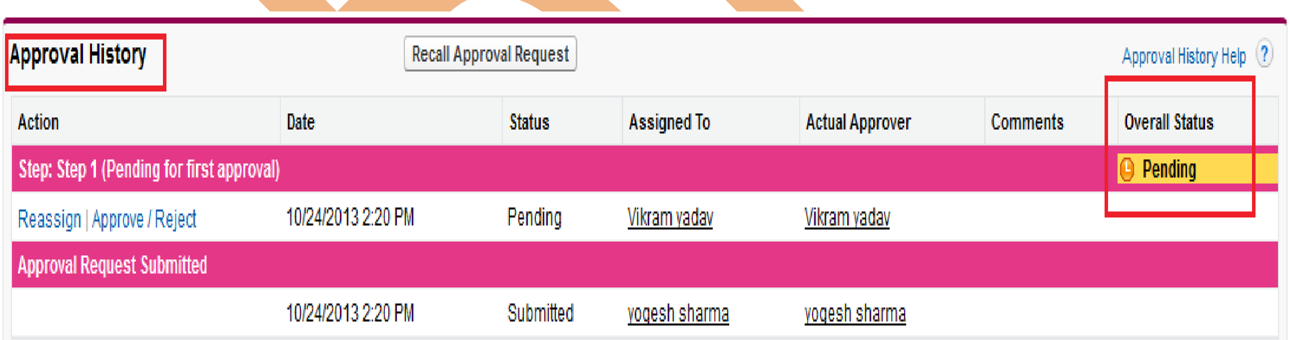
Click on Custom object(Job Applications) > Select any Field(Job application) > then click on **Edit Layout** link.
Click on **Button** link then **Submit for Approval** button you can drag and drop.



After that click on save button then click on any job application field after then scroll down you can see Approval History. see below.
and Click on **Submit For Approval** button for submit this Approval process.



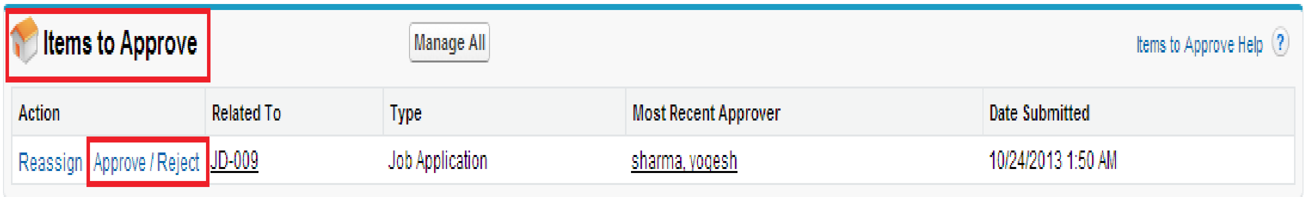
After click Submit for Approval button Approval History lock like. see below.
There is you can see Overall Status is Pending.



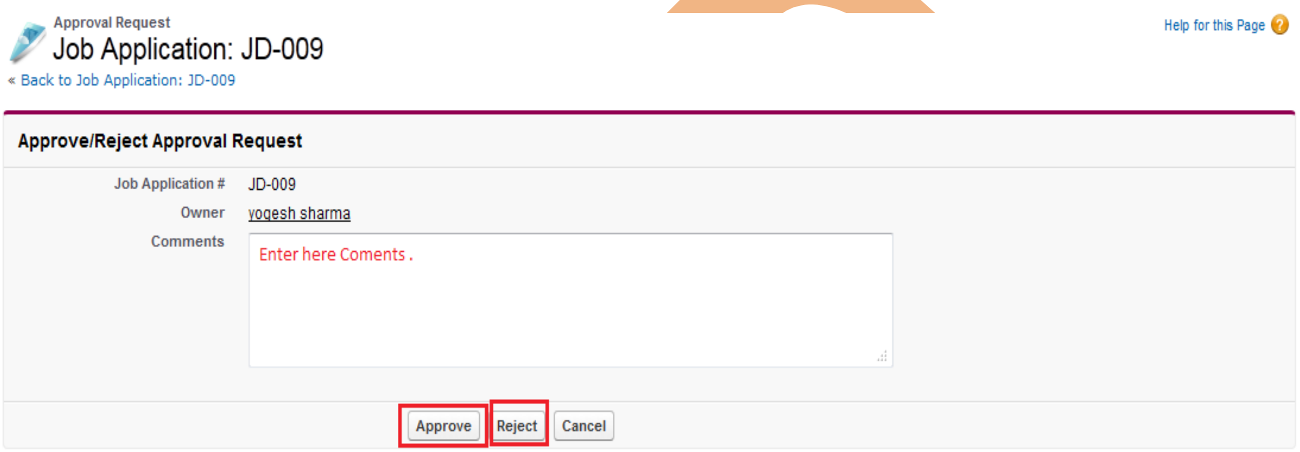
Step 6 :-

This screen is Manager screen. you can see below.

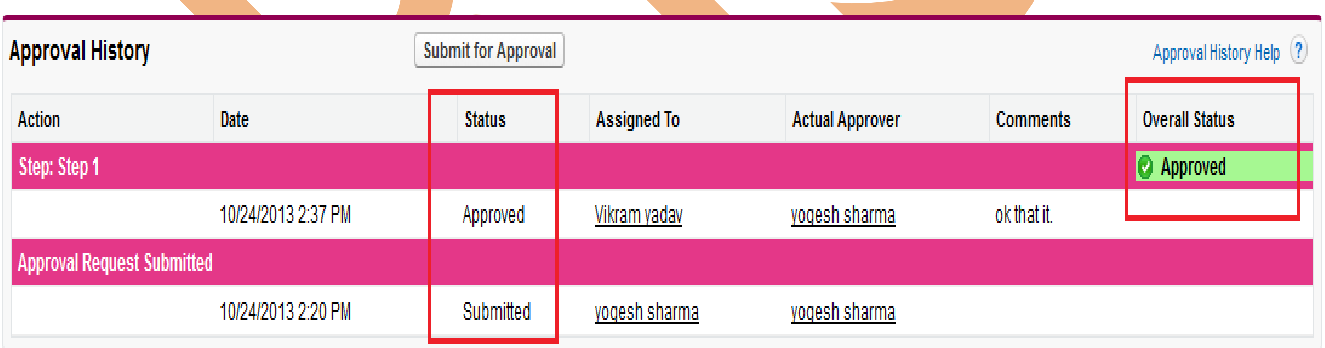
Click on **Approve/Reject** link Manage approve or Reject this Process.



After that if want to Approve this process click on Approve button or click Reject button for Reject this process.



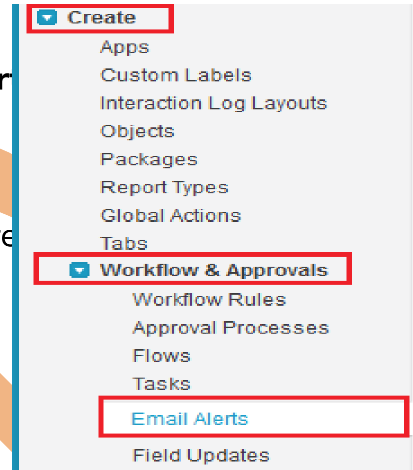
Step 7 :-
After approve process by Manager you can see you page approve status will be changed, see below.
There is Overall Status is Approved.



Email Alerts

Email alerts are emails generated by a workflow rule or approval process and sent to designated recipients whenever specific business actions trigger the workflow rule or approval process. Must specify an email template for email alerts.

To Get Started Using Email Alerts



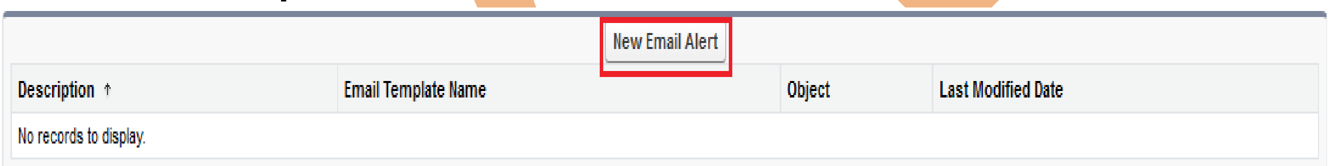
Step > **Creates** > **Workflow & Approval** > **Email Aler**

From this page you can :

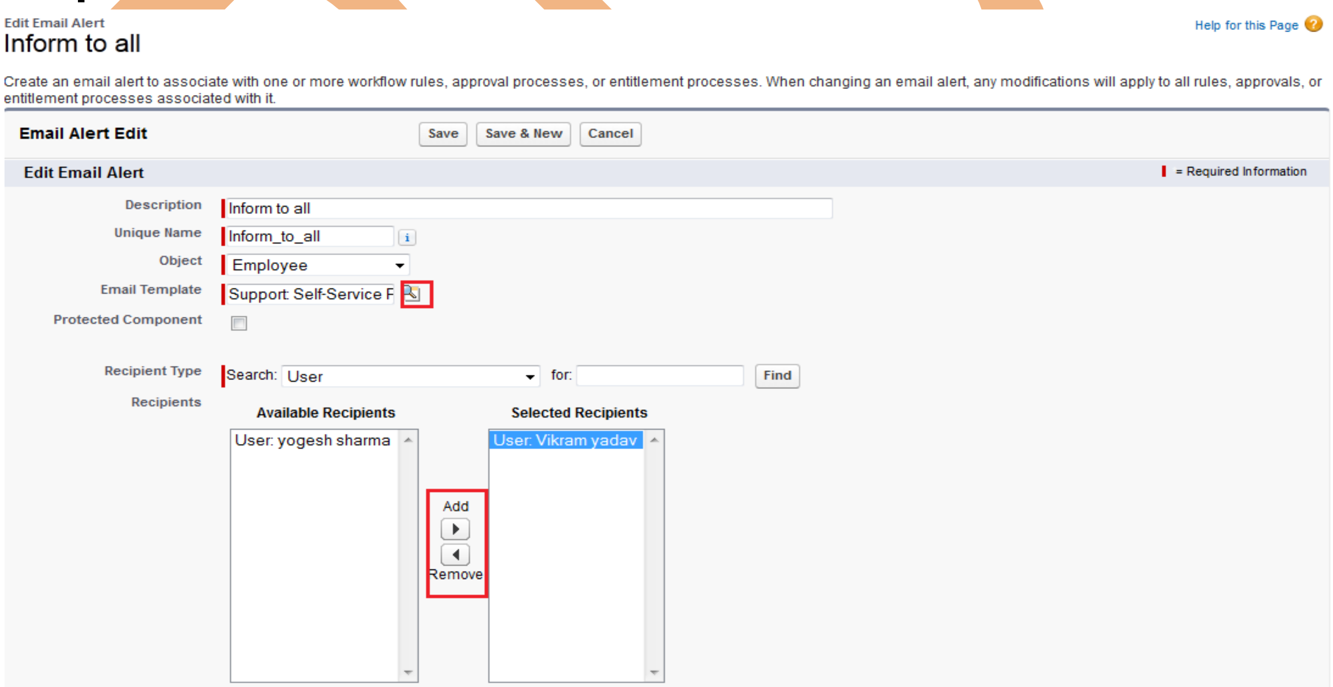
- Create a new email alert.
- Select an existing email alert to view details about it, cre cloned email alert, or view all the rules using it.
- Edit an existing email alert.
- Delete an email alert.

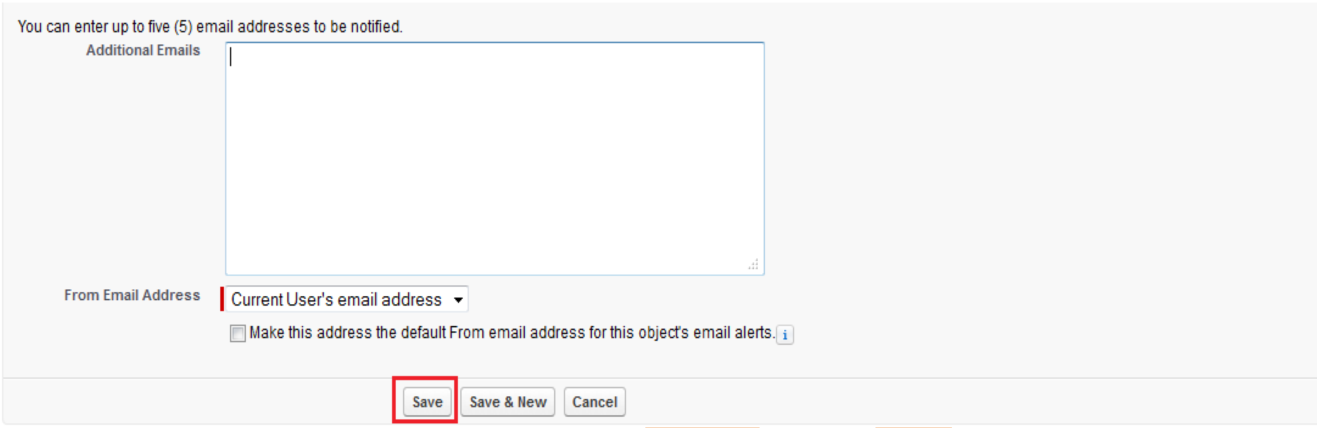
Step 1 :-

Click on **New Template** button.



Step 2 :-





1. Enter a description.
2. Enter a unique name to refer to this component in the API.
3. choose the object for this email alert If available in dropdown.
4. Choose an email template.
5. Select Protected Component to mark the alert as protected if it is part of a Managed - Released package, If available.
6. Select who should receive this email alert. Depending on your organization settings and the object you selected, some options in this list may not be available.
7. Select the recipients who should receive this email alert in the Available Recipients list and click **Add**.
8. Enter up to five additional email addresses.
9. You can change the From Email Address, selecting in dropdown list.
10. Click **Save** button.

Workflow Daily Email Limit

The daily limit for emails sent from workflow and approval-related email alerts is 1000 per standard SalesForce license per organization. The overall organization limit is 2000000. If the default workflow user isn't set, then the warning email is sent to an active system administrator.. When the daily limit is reached, a warning email goes out to the default workflow user.

Reports and Dashboards in SalesForce

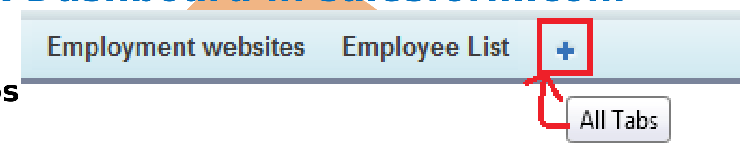
SalesForce.com provides powerful reporting and generation tools on the data stored in the objects.
by using reports in SalesForce you can generate four types reports.
1. Tabular Form Report - This is the most basic report. It displays just the row of records in a table like format with grand total. Tabular reports cannot be used for generating dashboards.
2. Summary Form Report - This is the most commonly type of report. It allows grouping of rows of data. It supports sorting and displaying subtotals. For example in a recruiting app, a summary report could be used to display open positions classified by department name

3. Matrix Form Report - Group by rows and columns of data to get sub totals and grand totals.
Matrix form report Complex of report.
4. **Joined Report -** A joined report can contain data from multiple standard or custom report types. You can add report types to a joined report if they have relationships with the same object or objects. For example, if you have a joined report that contains the Opportunities report type, you can add the Cases report type as well because both have a relationship with the Accounts object.

How to Enable Reports & Dashboard in salesform.com

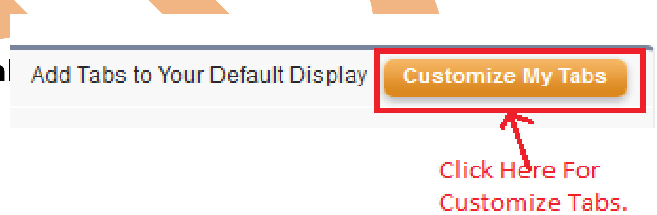
Step 1 :-

In SelesForce.com Click on **All Tabs**

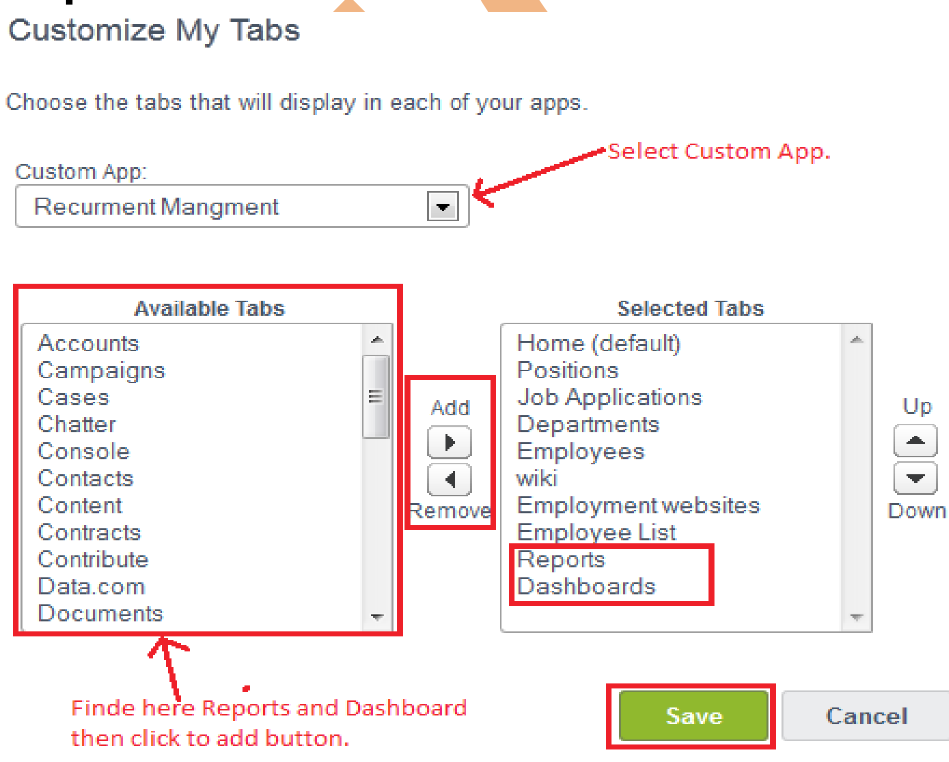


Step 2 :-

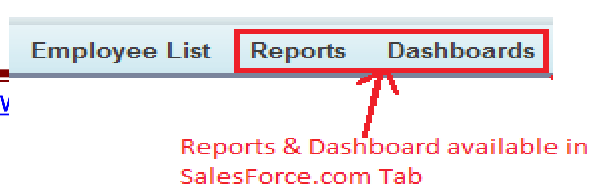
After that on this page you can see right and top side **Customization My Ta**
Click on this button.



Step 3 :-



1. Select Custom app click on **Custom App** dropdown menu.
2. Select Reports & Dashboard in **Available Tabs**.
3. Click on **Add** button.
4. After you can see Reports & Dashboards available in Selected Tabs.
5. Click on **Save** button.



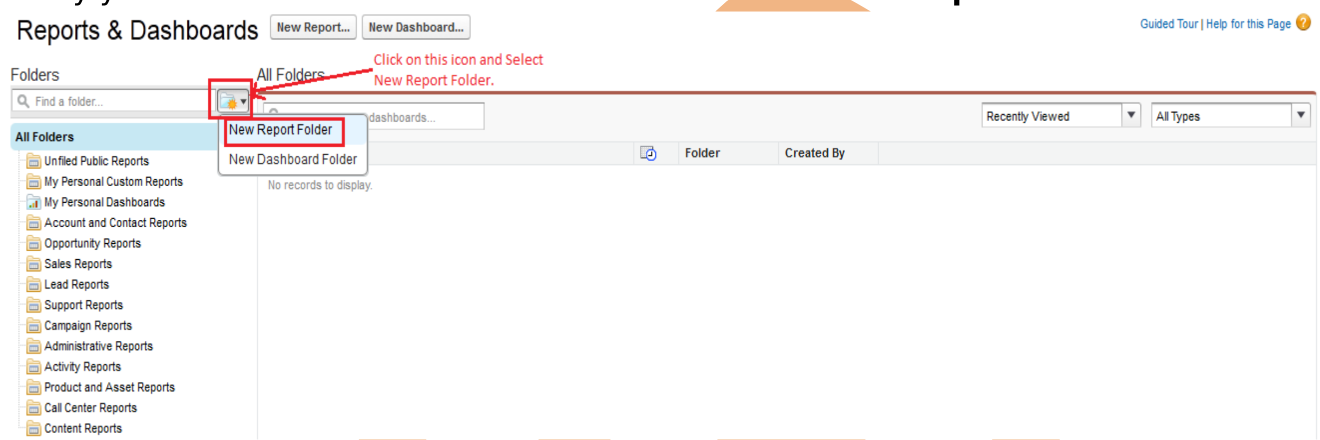
After that you can see in you tab
on SalesForce.com.

How To Create Report

Click on **Reports Tab**.

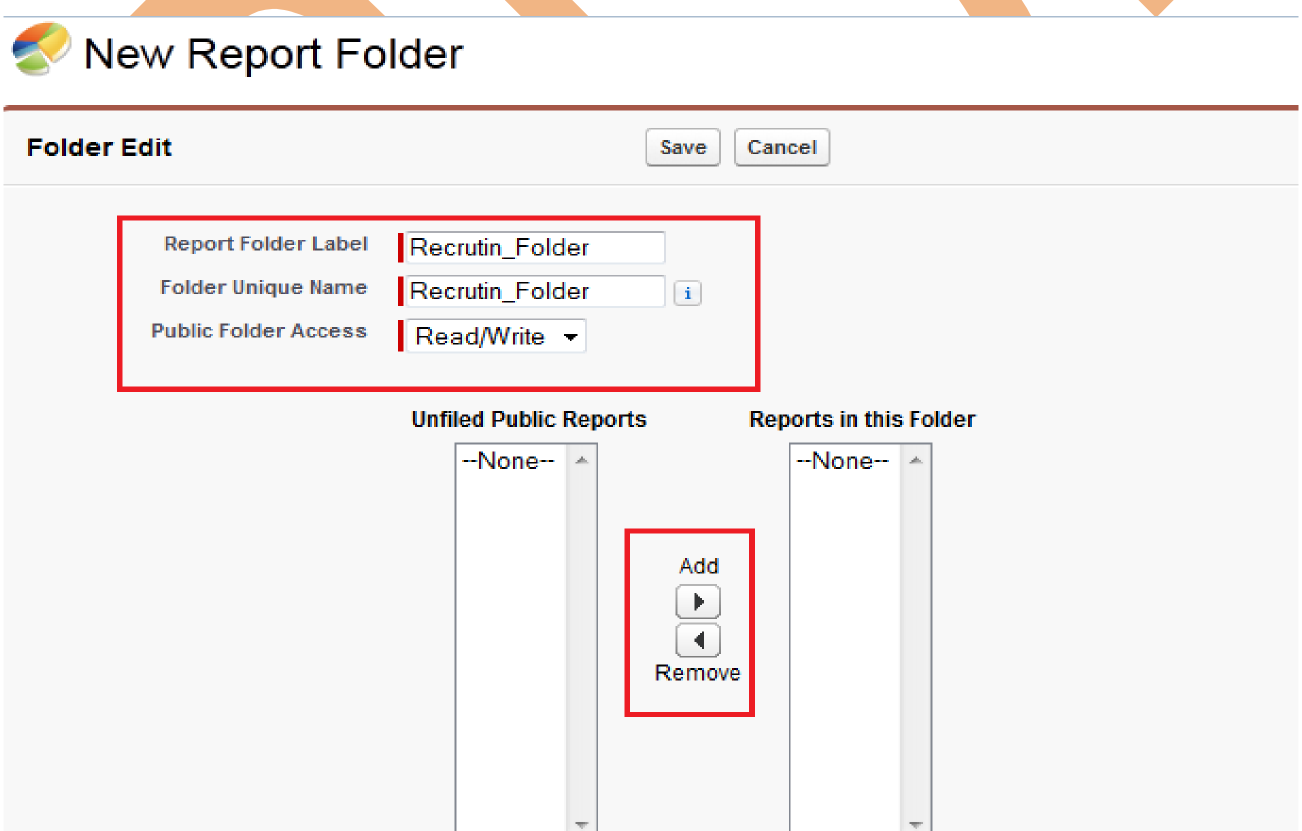
Step 1 :-

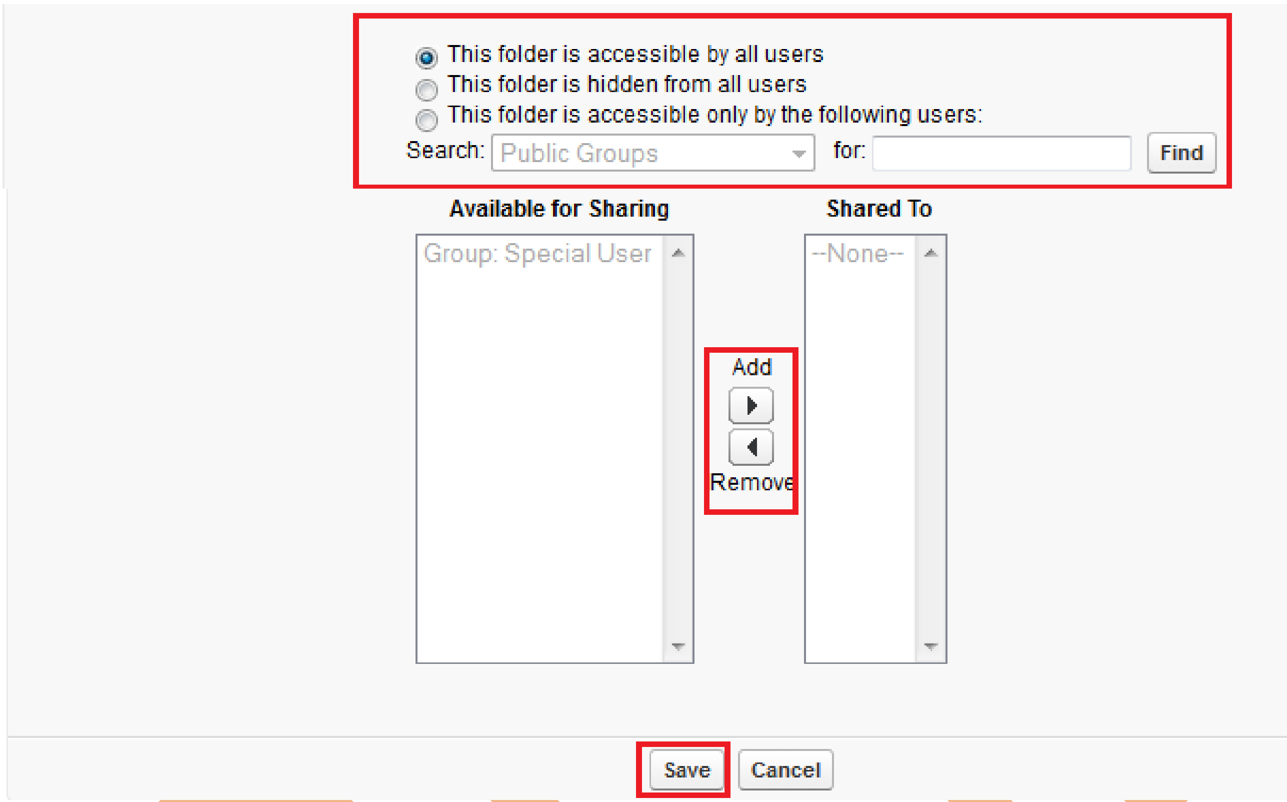
Firstly you need to create folder Click on icon then click **New Report Folder**.



Step 2 :-

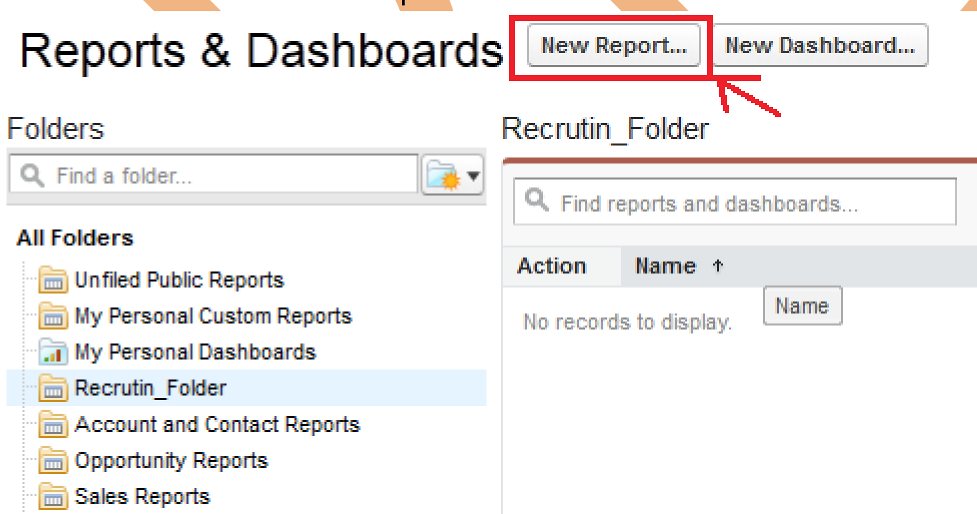
then you can see new page.





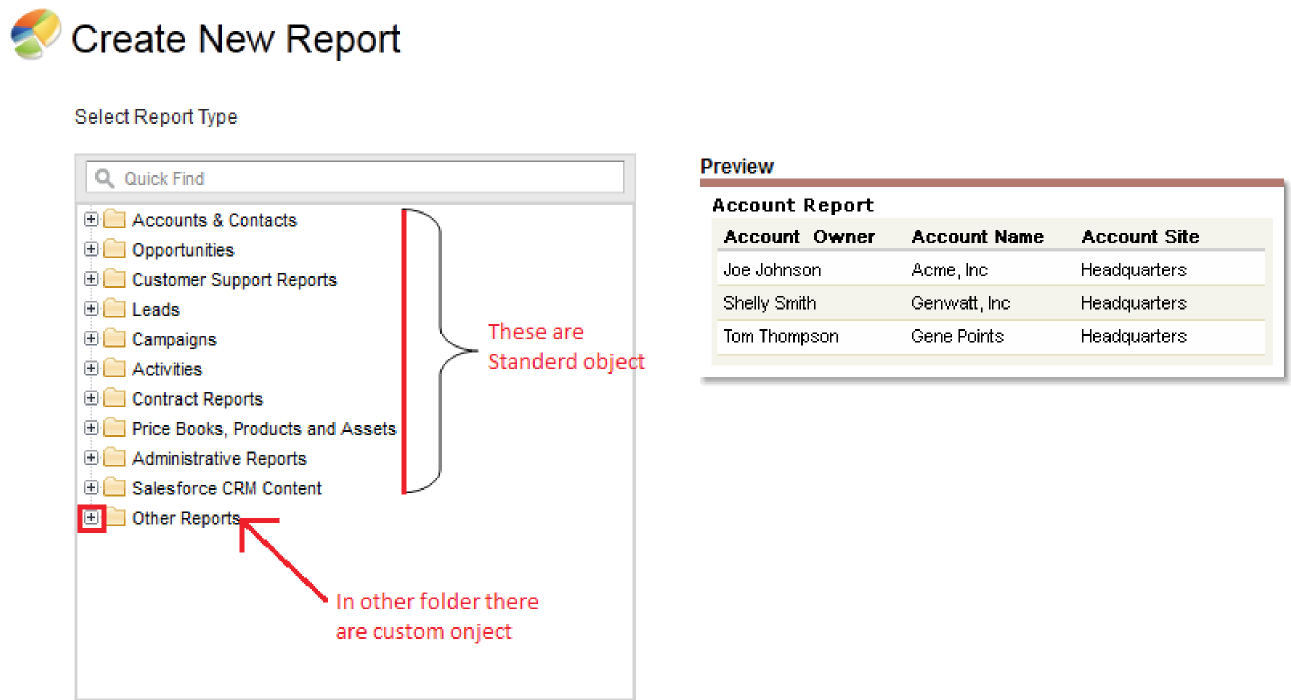
Step 3 :-

After then click on New Report button.

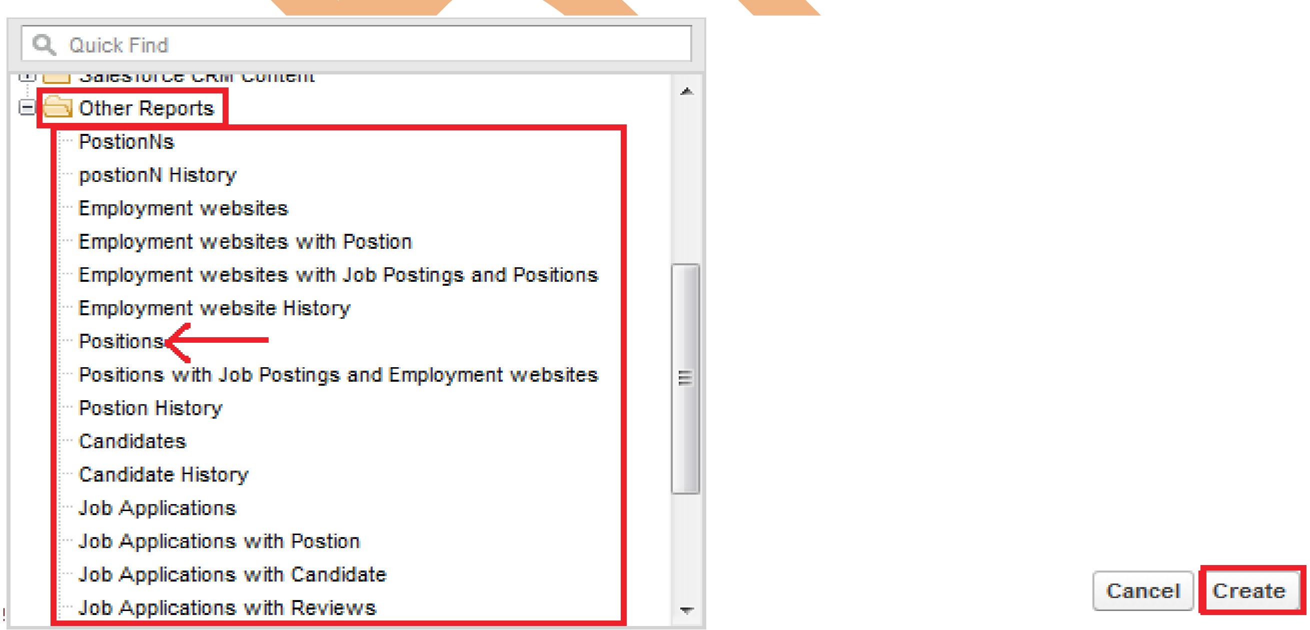


Step 4:-

There are many Standard Object click on plus icon for expanding data. and in you can see other reports folder this folder belong to custom Object.



click on Other Reports folder you can see there is many custom object choose any one custom object according your requirement, after select custom object click on Create button.



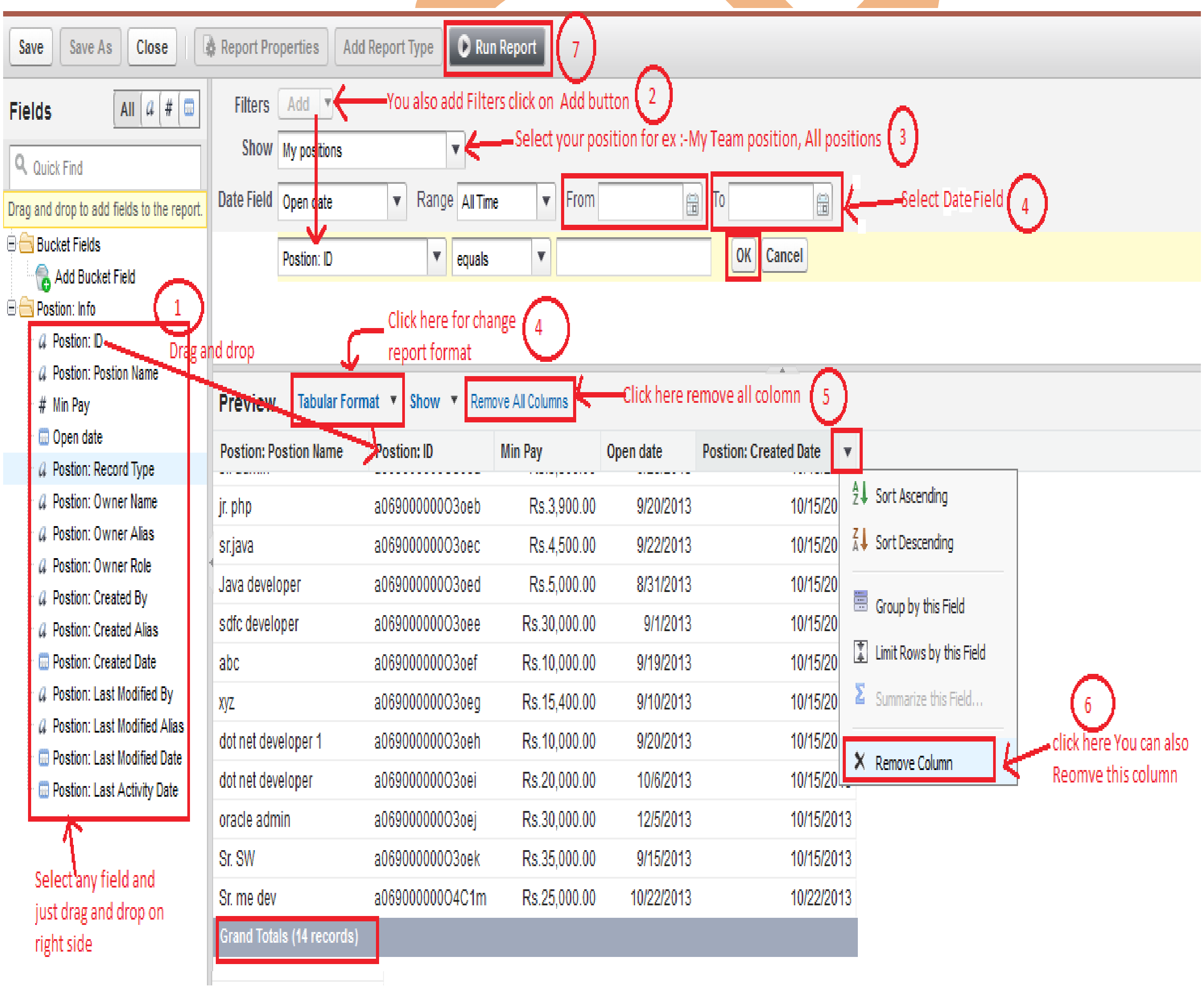
Tabular Format :

Tabular report. This is the most basic report. It displays just the row of records in a table like format with grand total. Tabular reports cannot be used for generating dashboards.

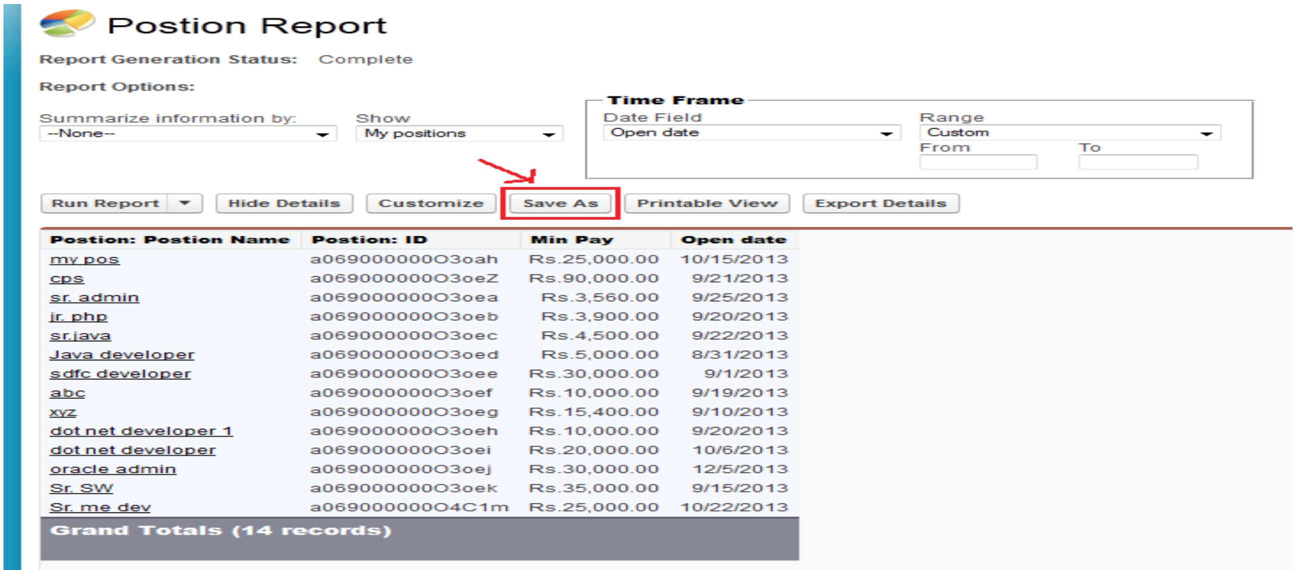
Step 5 :-

In this page you can see custom object fields available just drag and drop this field's.

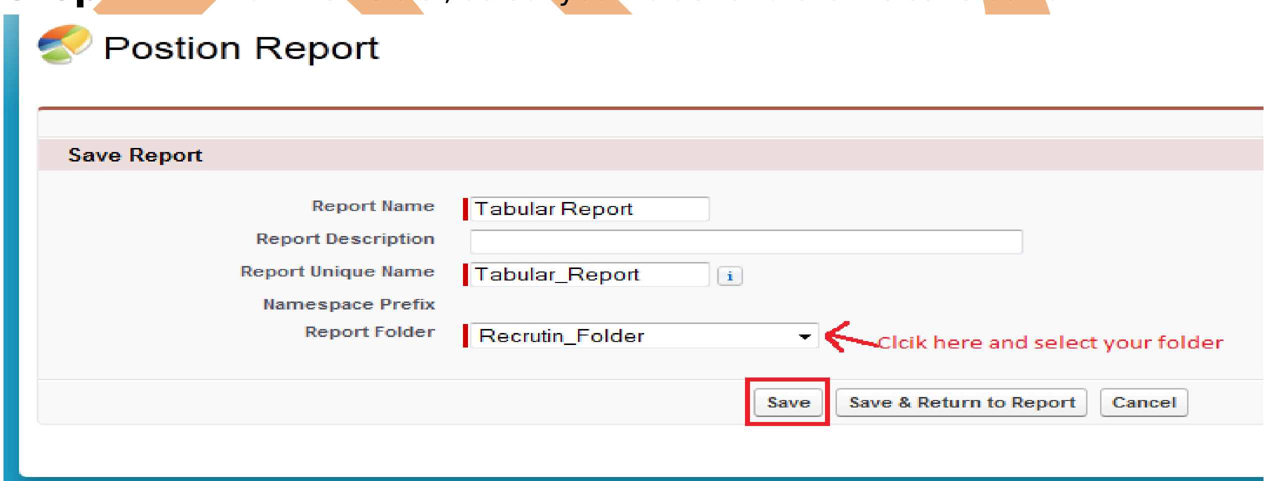
1. select any field then drag and drop right side on this page.
2 if want to add filter click on add button.
3. select your position by using drop down.
4. if want to change format click on icon change this format type.
5. if you want to remove all fields click on Remove All Column link.
6. if want Remove single field click on icon then click on Remove column link.
7. After that click on Run Report.



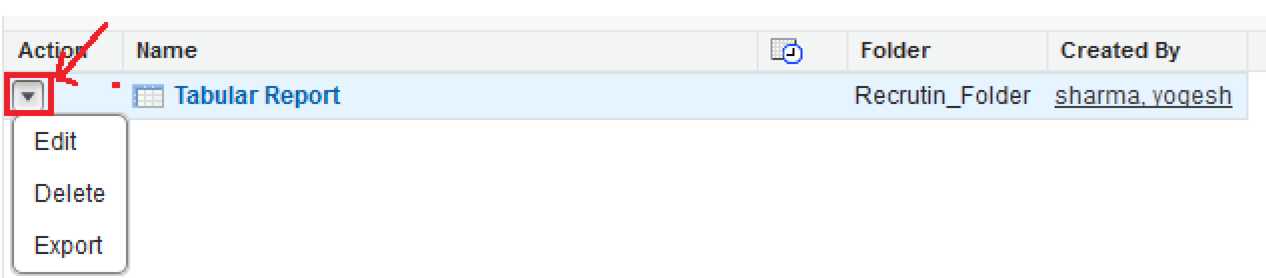
Step 6 :-
Click on Save As button.



Step 7 :- Fill all the field's , select your folder and click to save button.



Step 8 :- After Save you can see new page there you can see Tabular Report available if you want to Edit, Delete, Export click on icon and you can do it.

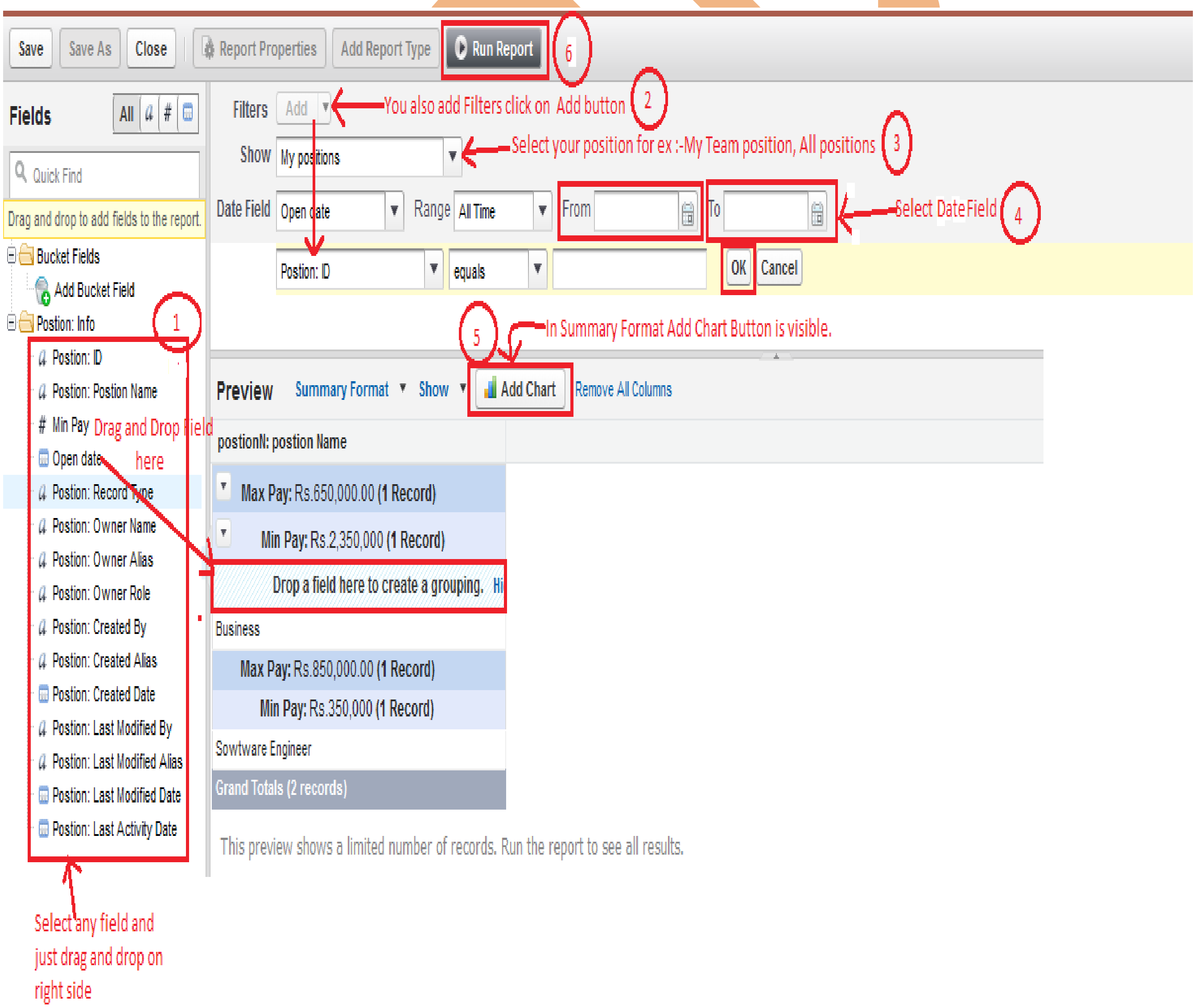


Summary Format :

This is the most commonly type of report. It allows grouping of rows of data. It supports sorting and displaying subtotals. For example in a recruiting app, a summary report could be used to display open positions classified by department name.
step 1 to Step 4 same as previous.

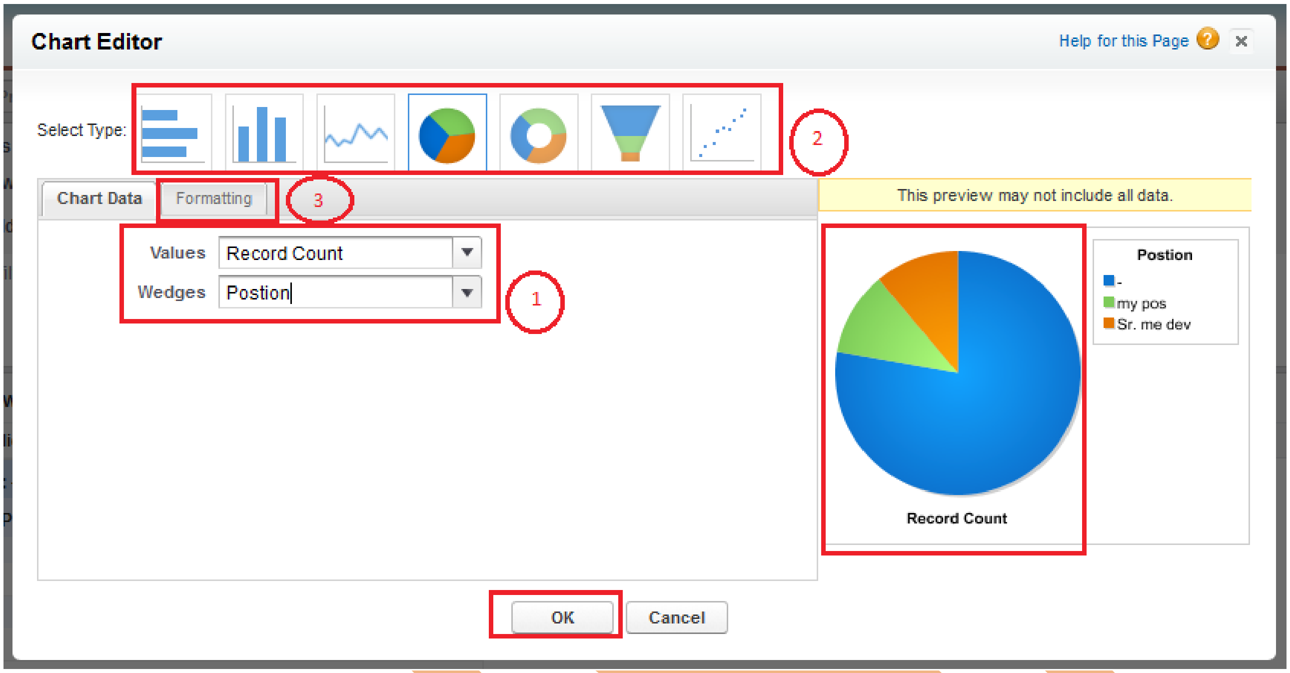
Step 5 :-

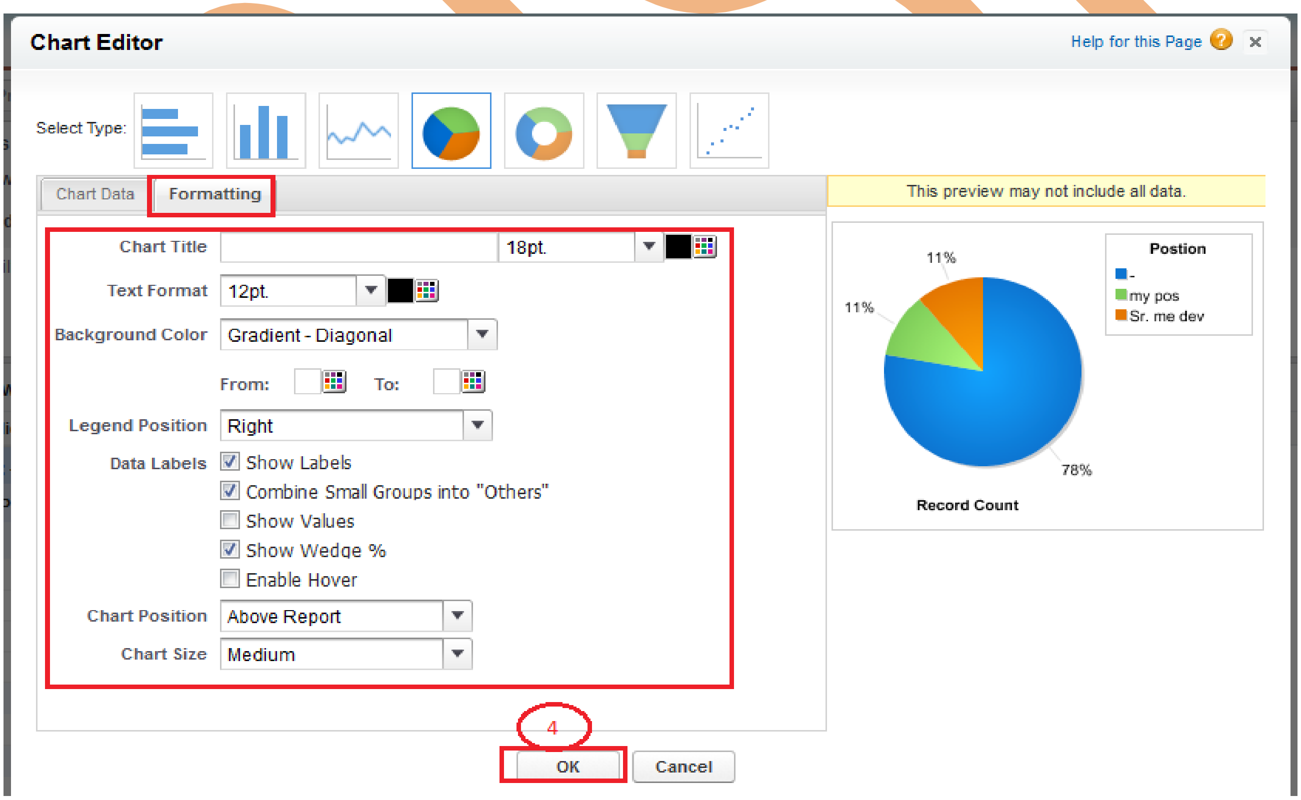
step 1 to 4 is same is it previous.
5. Click on Add Chart button for adding chart.



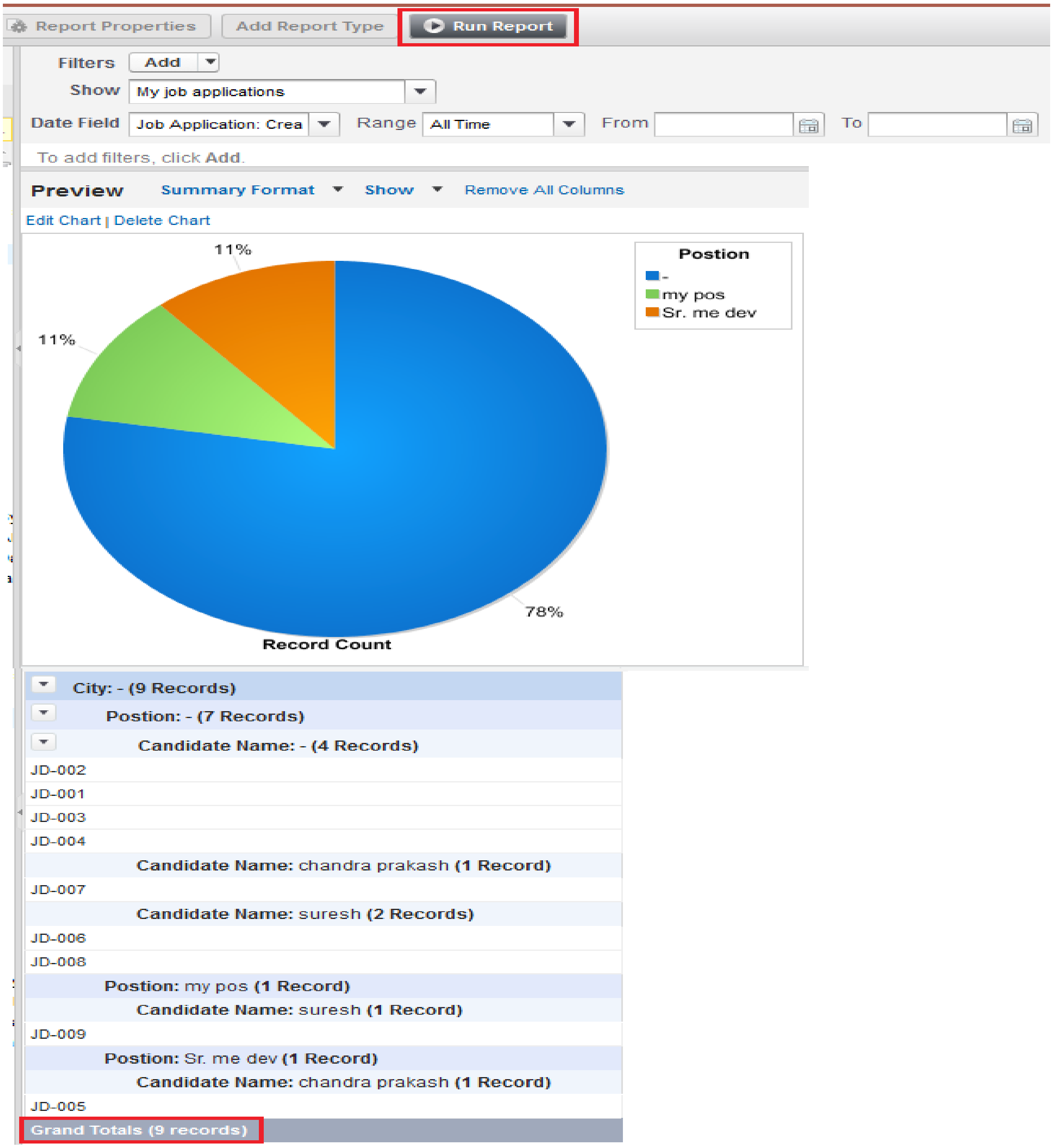
Step 5.1 :-

Then you have see one new popup page in this page called as chart editor. select any char then click on ok button.





1. Select Value and wedges.
2. choose what you type chart.
3.click on Formatting Tab.
   Then choose some property which you want.
4. Click on Ok button.
After click on Run As.

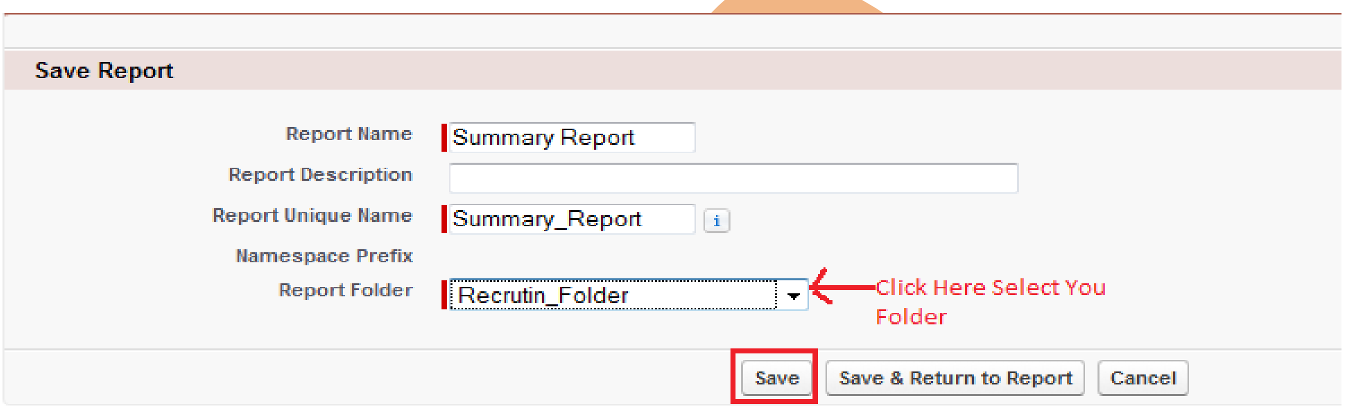


Step 6 :-

Click on Save As button.

Step 7 :-

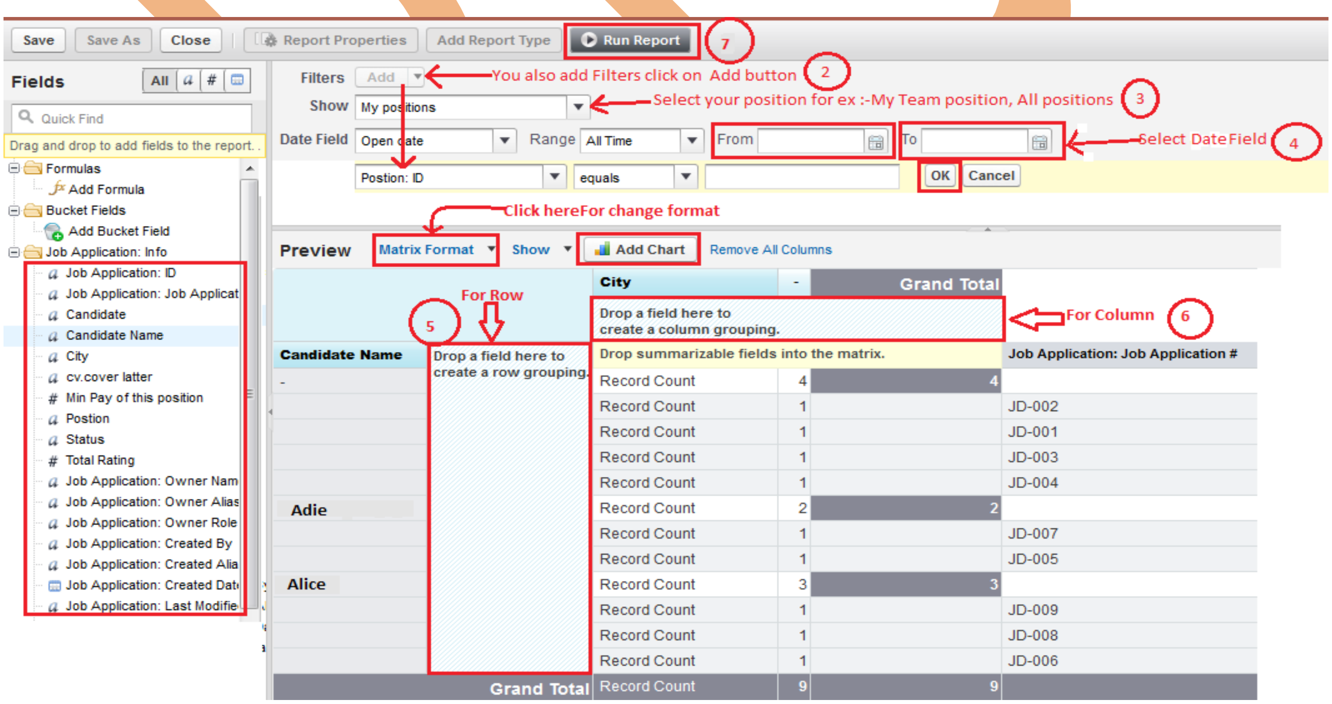
Fill all field's select folder name Then click on Save button.



Matrix Form Report

This is the most complex report format. Matrix report summarize information in a grid format. Matrix reports allows records to be grouped by both columns and rows.

step 1 to step4 same as previous.



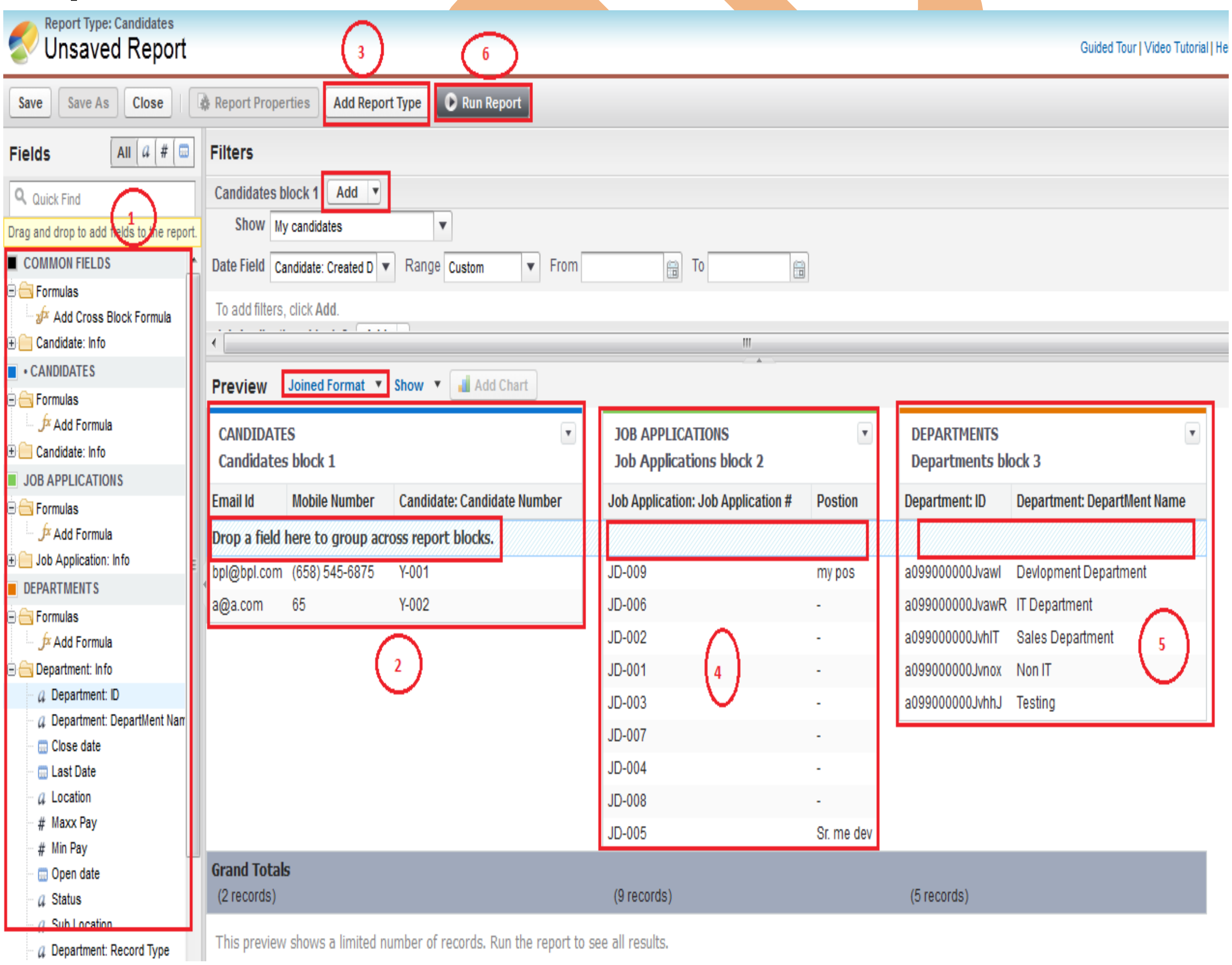
5. Drag and Drop Row .
6. Drag and drop column.
Note :- if want chart click on Add chart button for adding chart same as previous.
7.Click on Run As button.
All Steps same as previous example you can do it.

Joined Report :

A joined report can contain data from multiple standard or custom report types. You can add report types to a joined report if they have relationships with the same object or objects. For example, if you have a joined report that contains the Opportunities report type, you can add the Cases report type as well because both have a relationship with the Accounts object.

Step 1 to Step 4 same as previous.

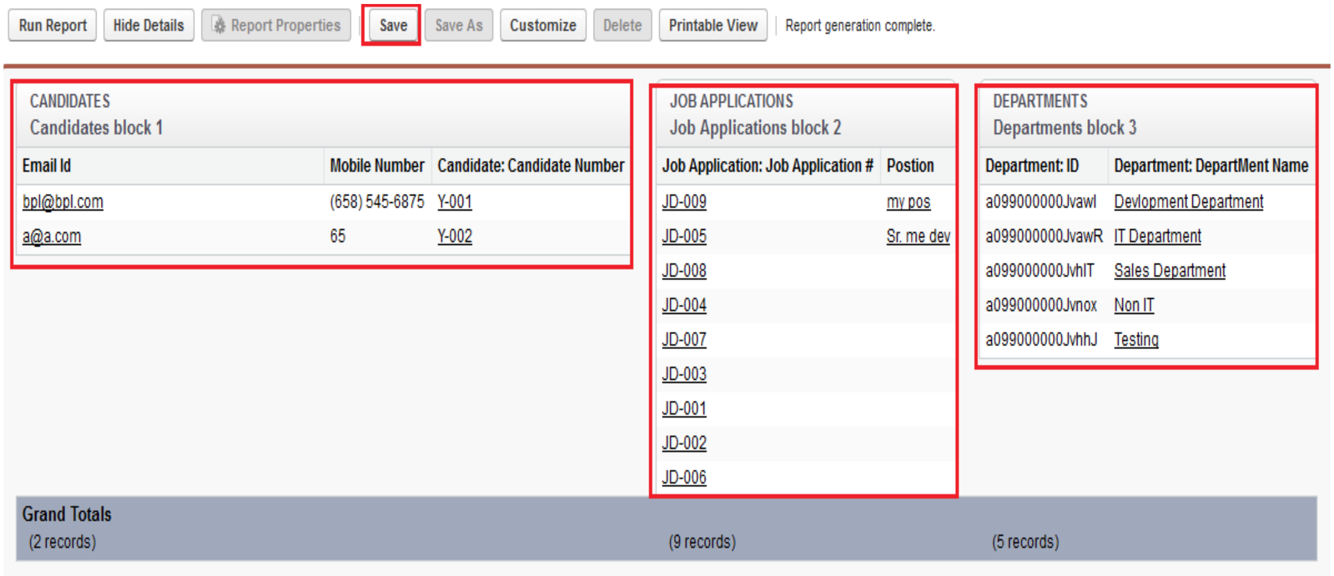
Step 5 :-



Drop a field to group report blocks.
1. you cans select any field and drag and drop.
2. Drop a field to group report blocks.

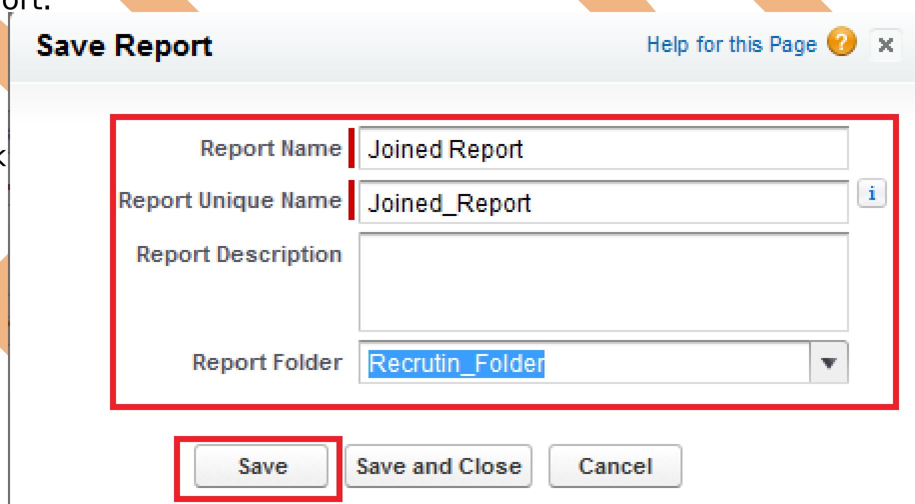
3. Click on Add Report Type button add more different report.
4 & 5. Drop a field to group report blocks.
6. Click on Run as button.

Step 6 :-



You can see here, there is three different custom object data available here. click on save button for save this report.

Give the Report Name, Unique Name, select Report Folder then click Save button.

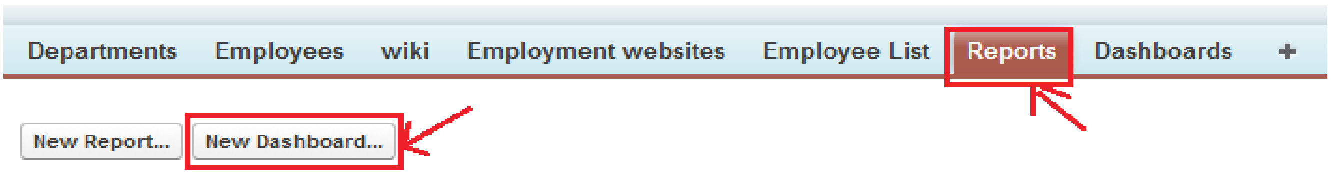


Dashboards in SalesForce

Create a dashboard to provide a graphical view of the data in your reports. you can view daily reports, weekly, monthly. you can all so add on your home page .

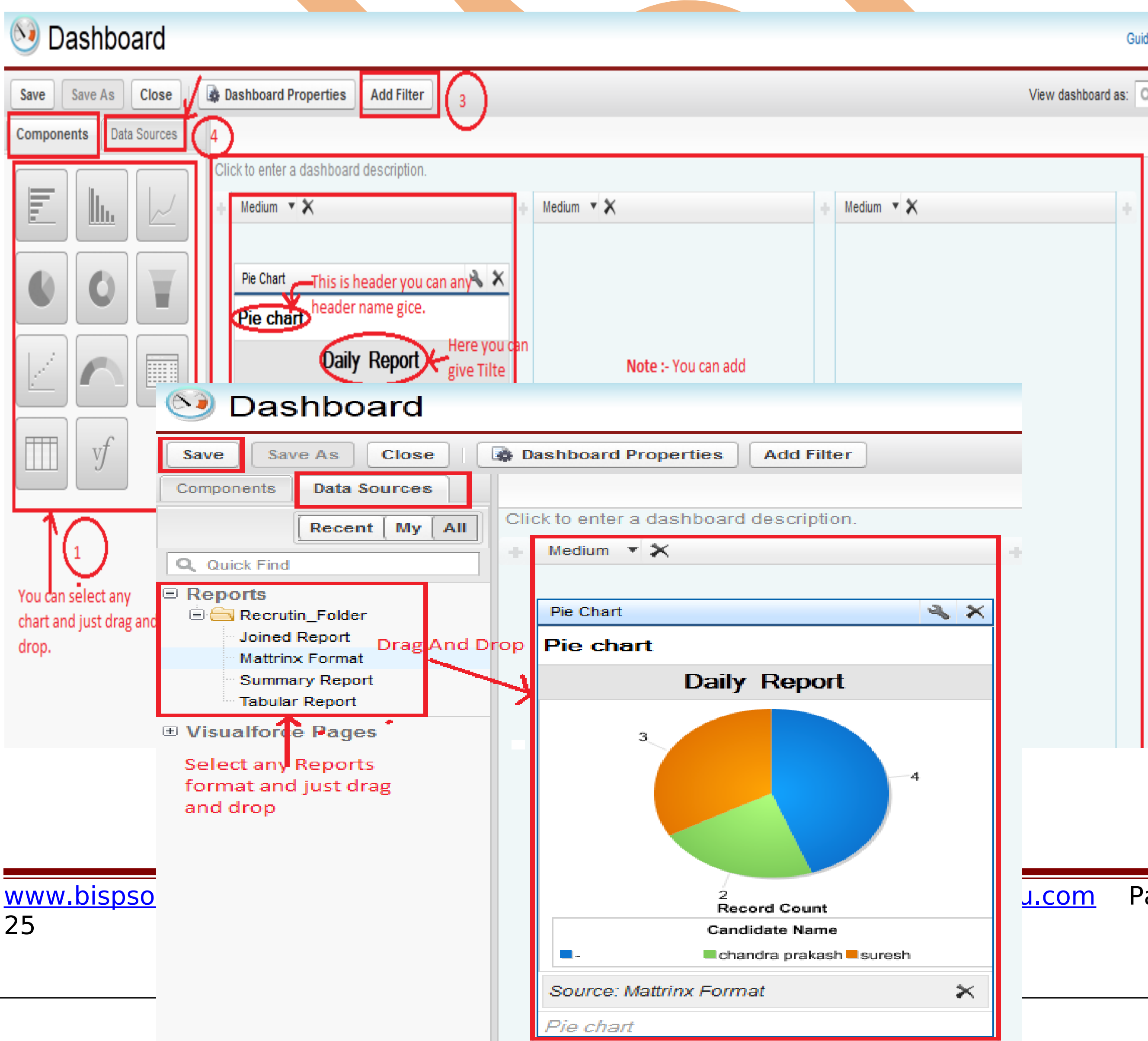
How to Activate Dashboards in SalesForce

Click on Reports then click on New Dashboards button.

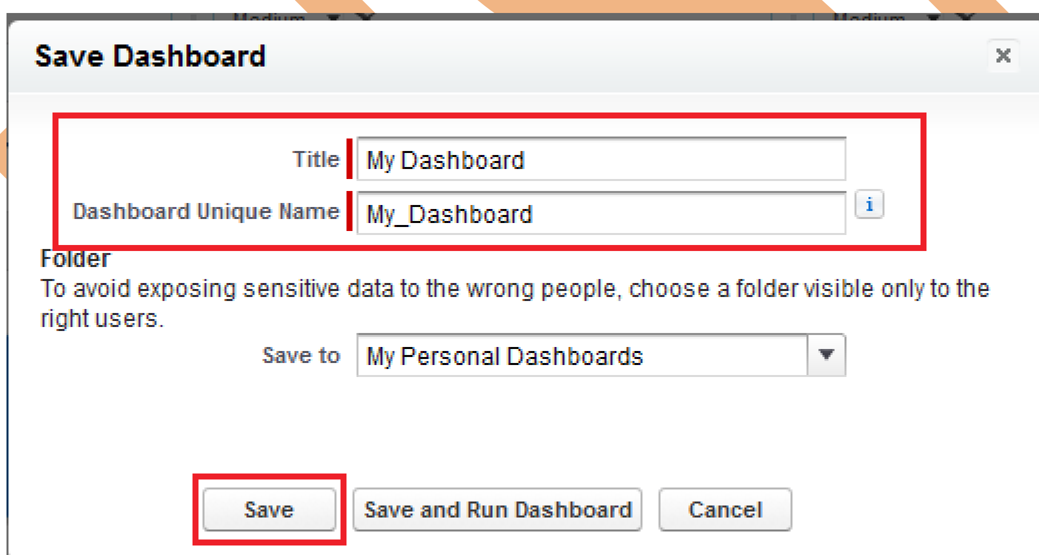


Step 1 :-

1. Select Any pie chart and drag and drop.
2. After drag and drop give some header name, title, and footer.
3. If want to add some filter you can add filter but firstly you can click on Data sources button add some source after than you can add filter.
4.Click on Data Sources button.



After Click on Data Source button. click on Repots folder and drag and drop any report type then click on Save button.



Then give Title and Dashboard Unique Name and click to save button.
Now you can click on Dashboards Tab in SalesForce.com you can see Dashboard.

Why Are Set Dashboard Into Home Page

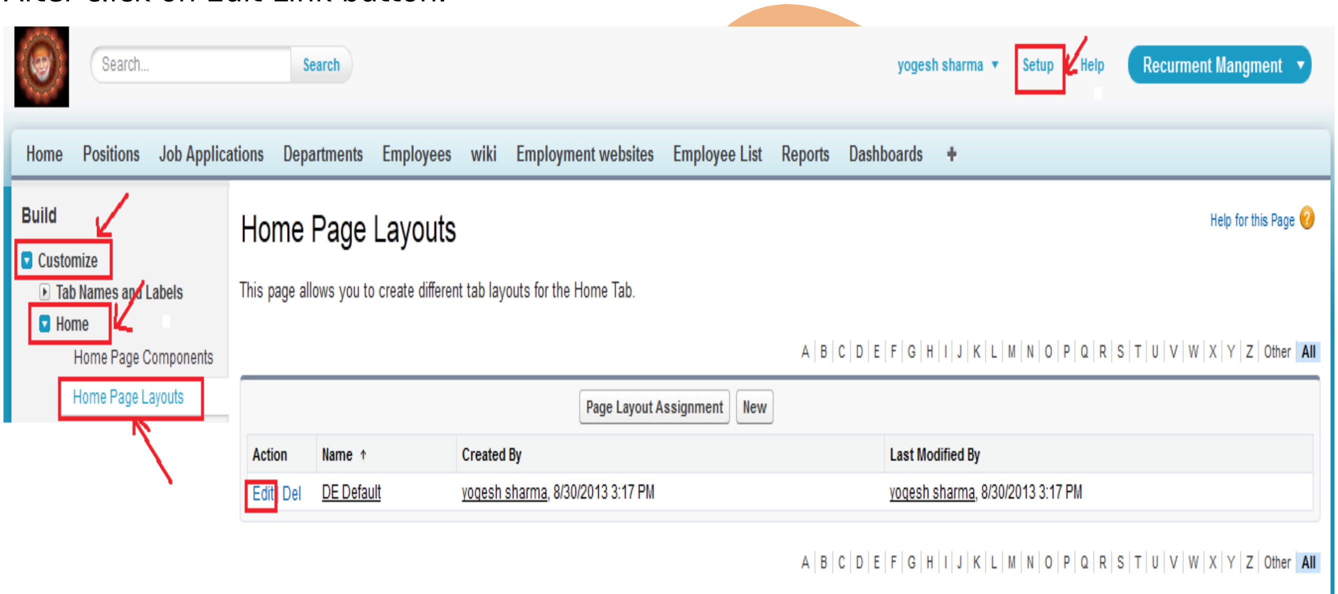
Any organization if set dashboard into home page, they will see daily update our organization on home page by using Dashboard. we will see below.

How Set Dashboard Into Home Page

Step 1:-

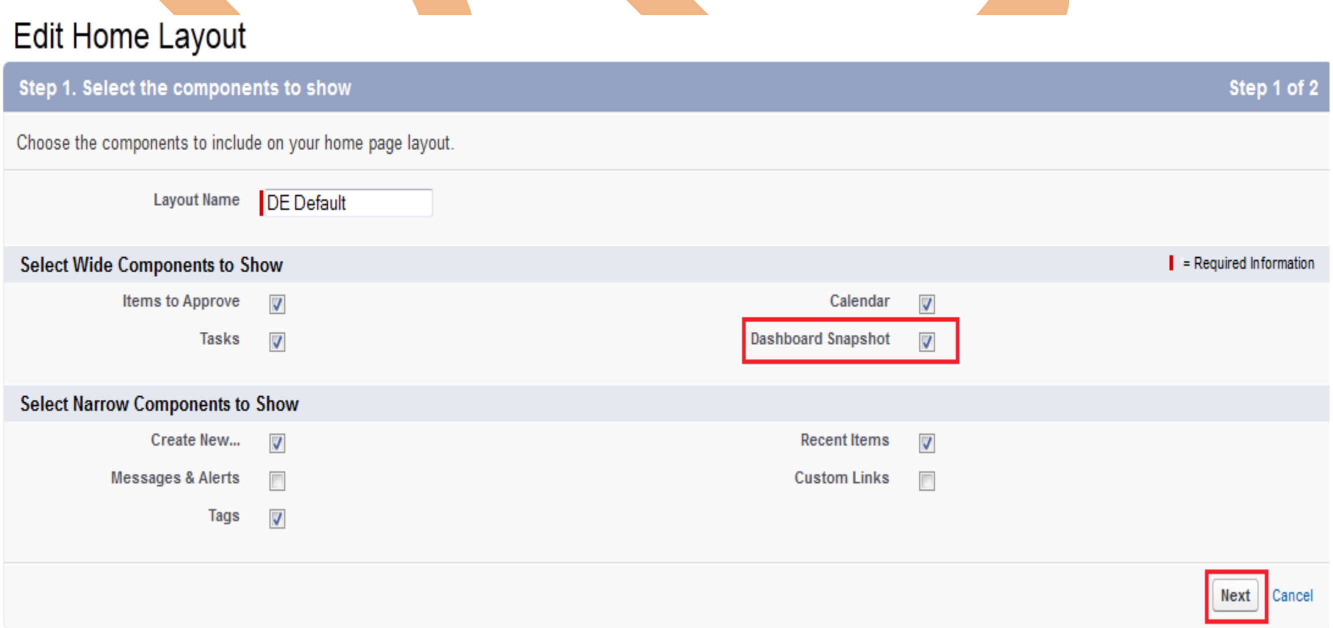
Setup > **Customize** > **Home** > **Home Page Layout**

After click on Edit Link button.



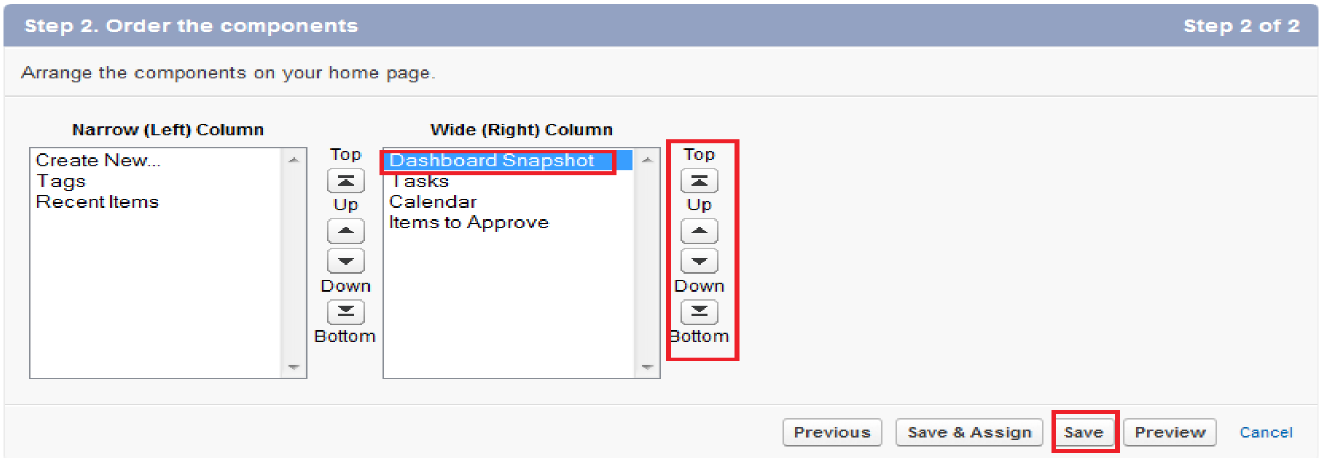
Step 2:-

Checked Dashboard Snapshot then click on Next button.



Step 3:-

Move Dashboard position then click on Save button. Then click on Home tab you can see Chart is there in home page.



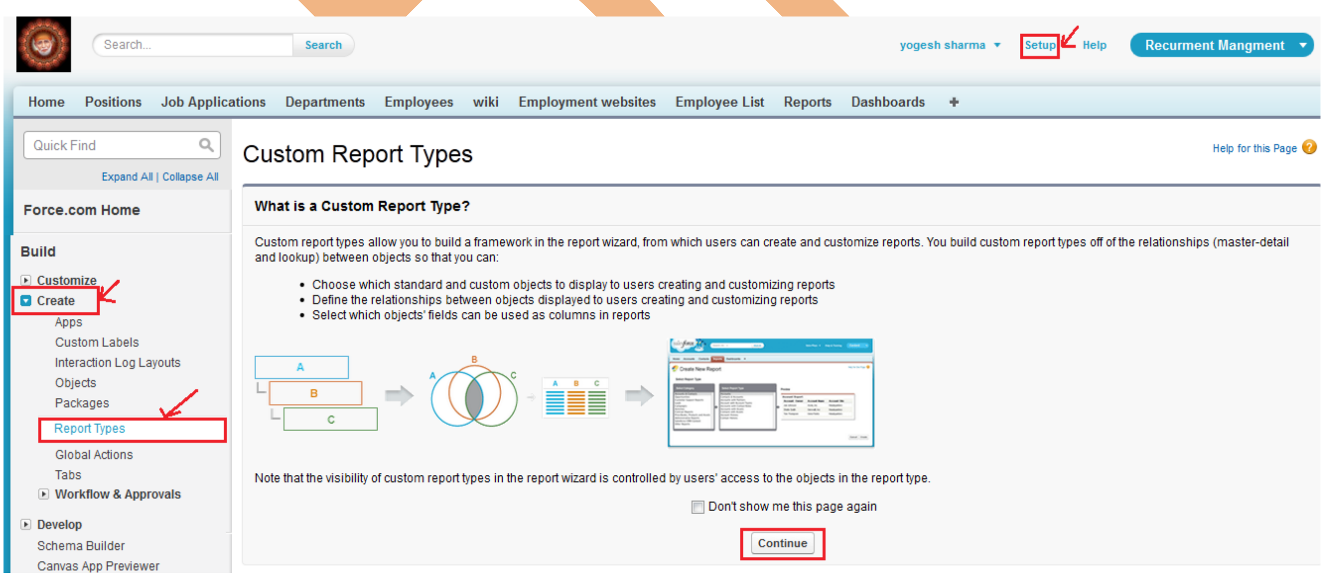
Report Types

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 between objects so that you can.
- Choose which standard and custom objects to display to users creating and customizing reports.
- Define the relationships between objects displayed to users creating and customizing reports.
- Select which objects' fields can be used as columns in reports.

How to Create Report Types

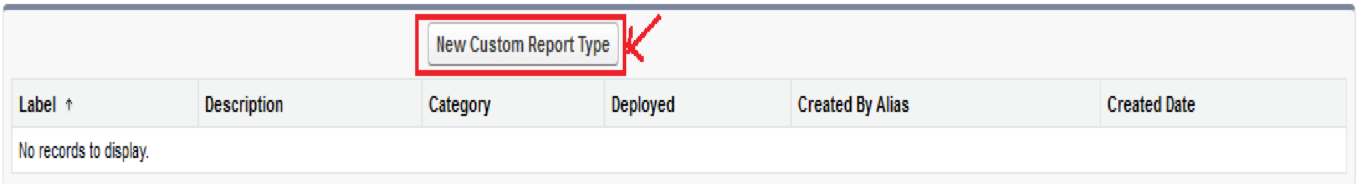
Step > Create > Report Types

Click on continue button.



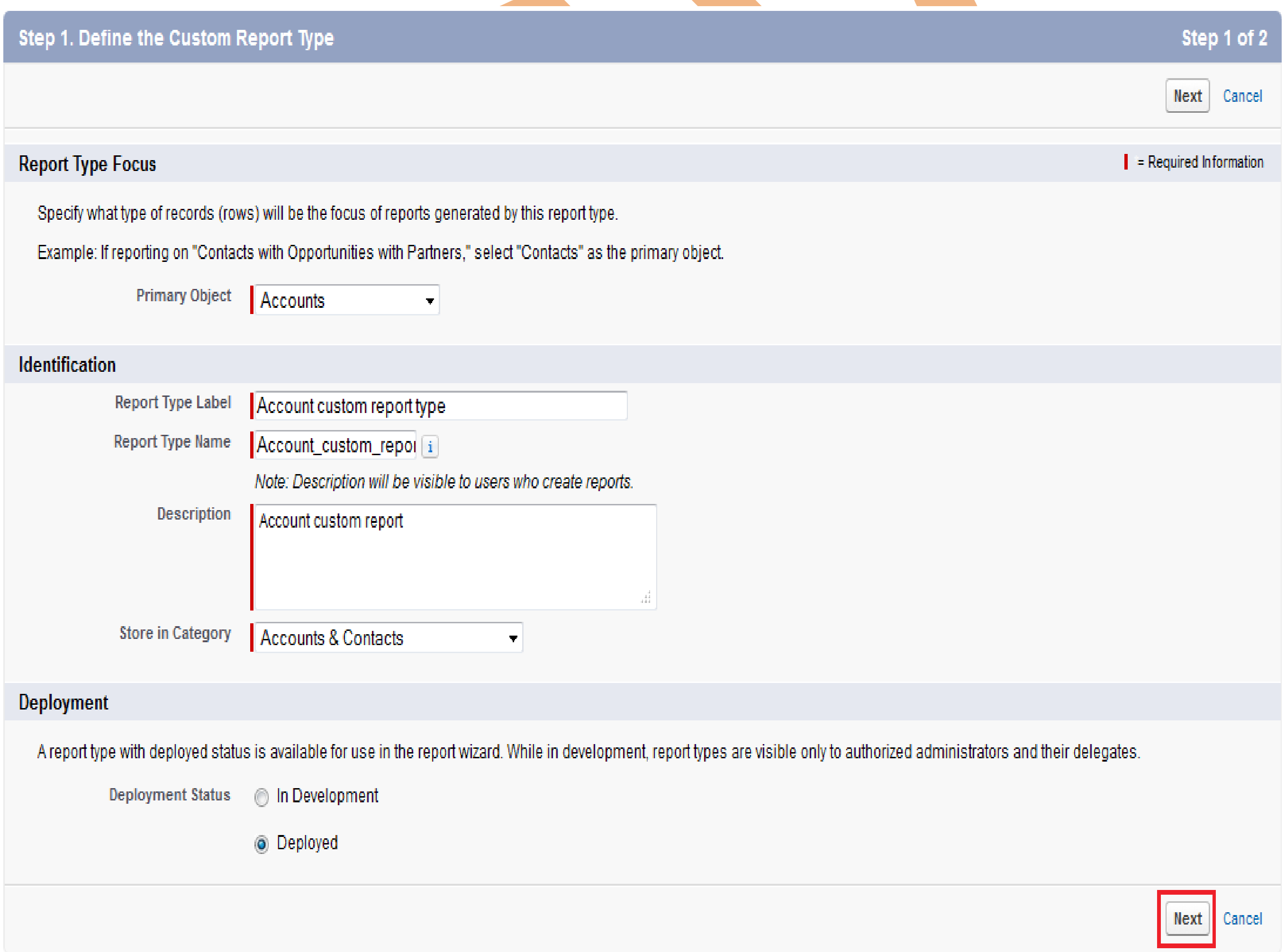
Step 1 :-

click on **New Custom Reports Type**.



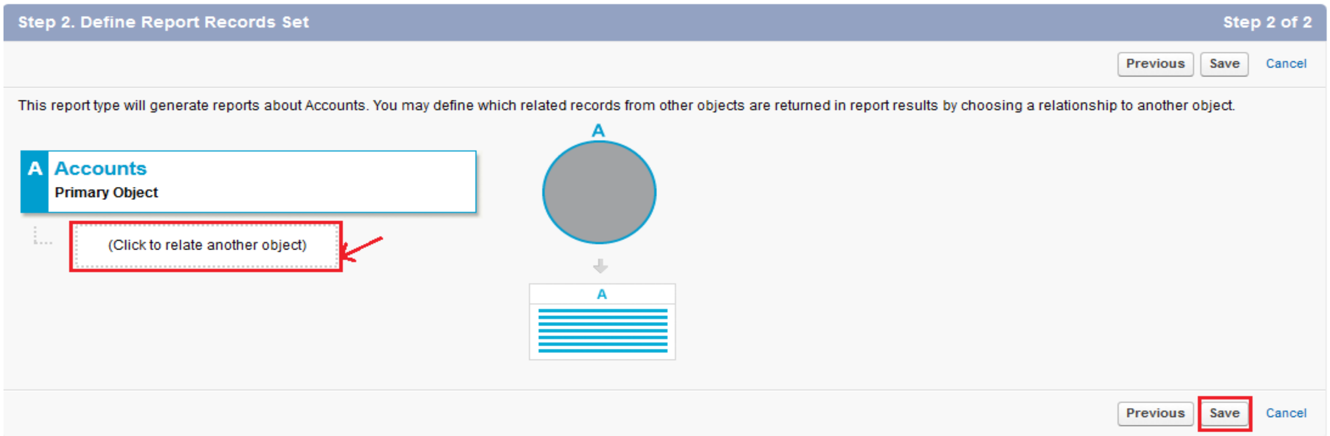
Step 2 :-

Fill the fields, there is all fields are mandatory then click on Next button.

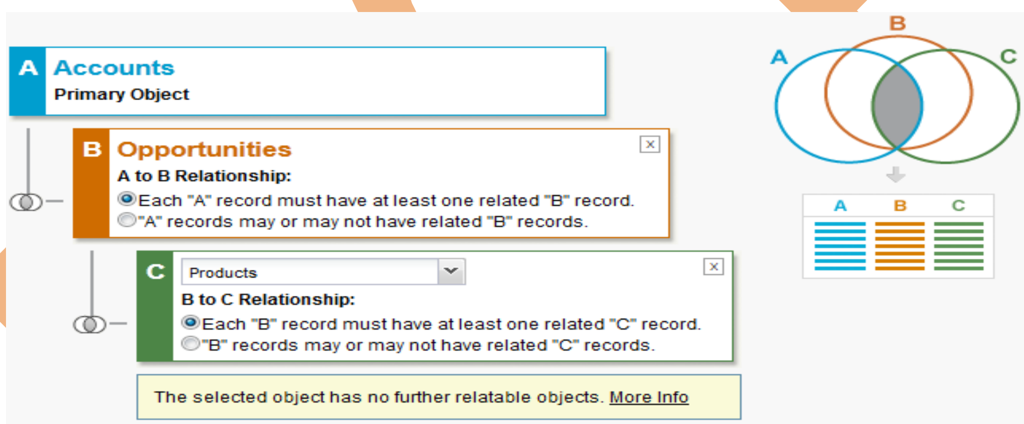


Step 3 :-

click on(click to relate another object) add for objects

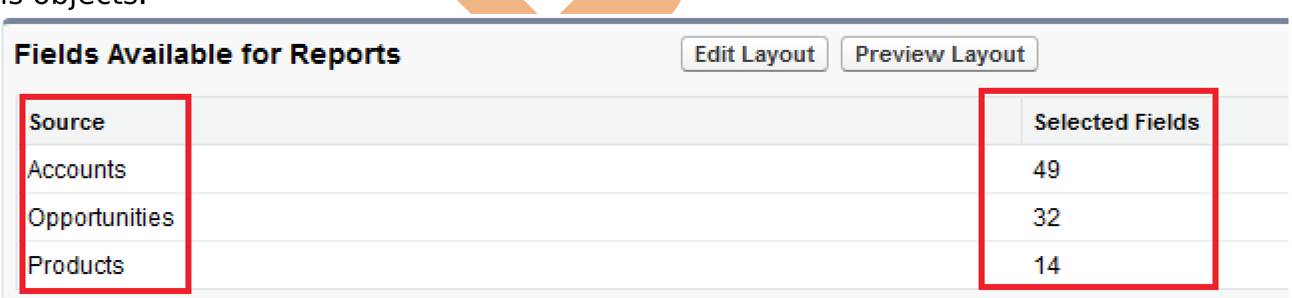


After click on(click to relate another object) link then you can see below.



After that click on save button.

There you can see summary of accounts, opportunities, products how many fields available this objects.



Fields Available for Reports Edit Layout Preview Layout

Source	Selected Fields
Accounts	49
Opportunities	32
Products	14