Getting Started with SalesForce CRM

Email and Workflow Rule Administration

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. This document focuses on Emails, Workflow and Filed Update administration. 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 2013
0.1	Review#1	Amit Sharma	10th Jan 2013

Contents

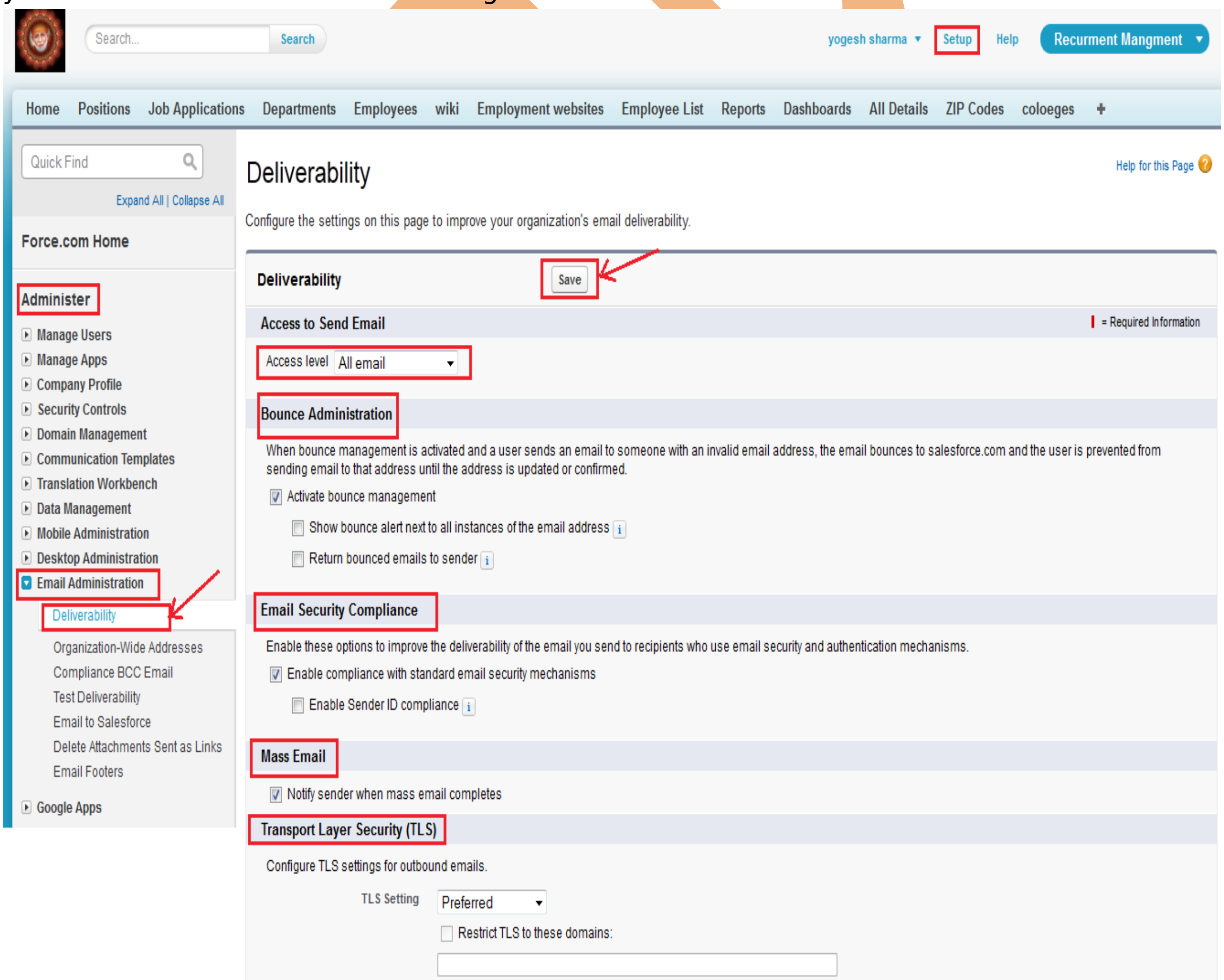
Manage email administration

Deliverability

Improve the deliverability of email you send from SalesForce, configure your organization's email deliverability settings.

Bounced email :
If you send Email and that is addressed to an invalid recipient, it is returned to the sender. If a sender sends several email messages that bounce, the email server might slow or block the delivery of all email from that sender.

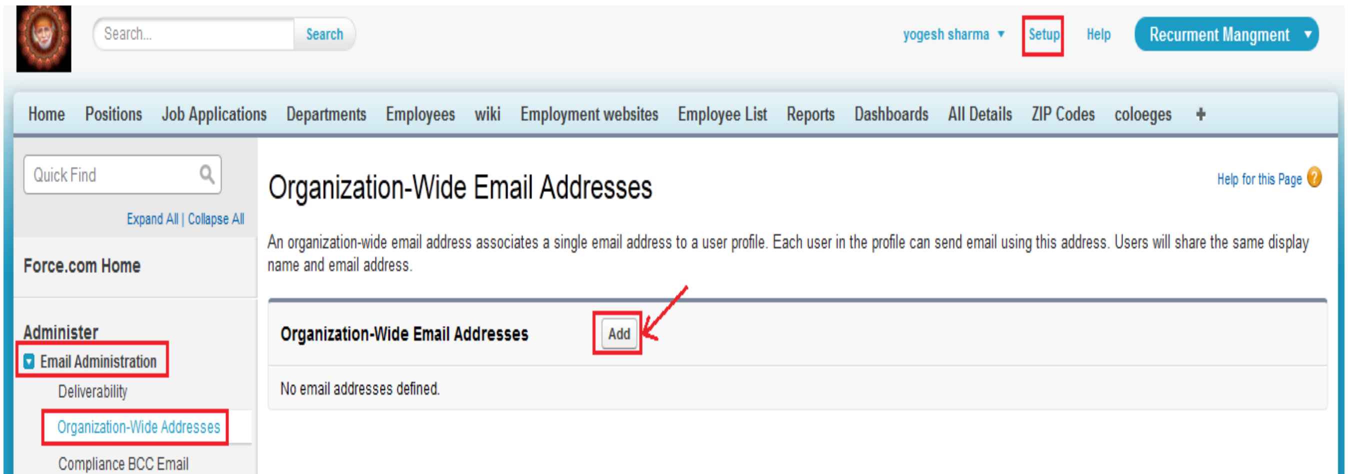
Configure the email deliverability settings for your organization :
Setup > **Administration** > **Email Administration** > **Deliverability**
you can see below. set all the settings and click on Save button.



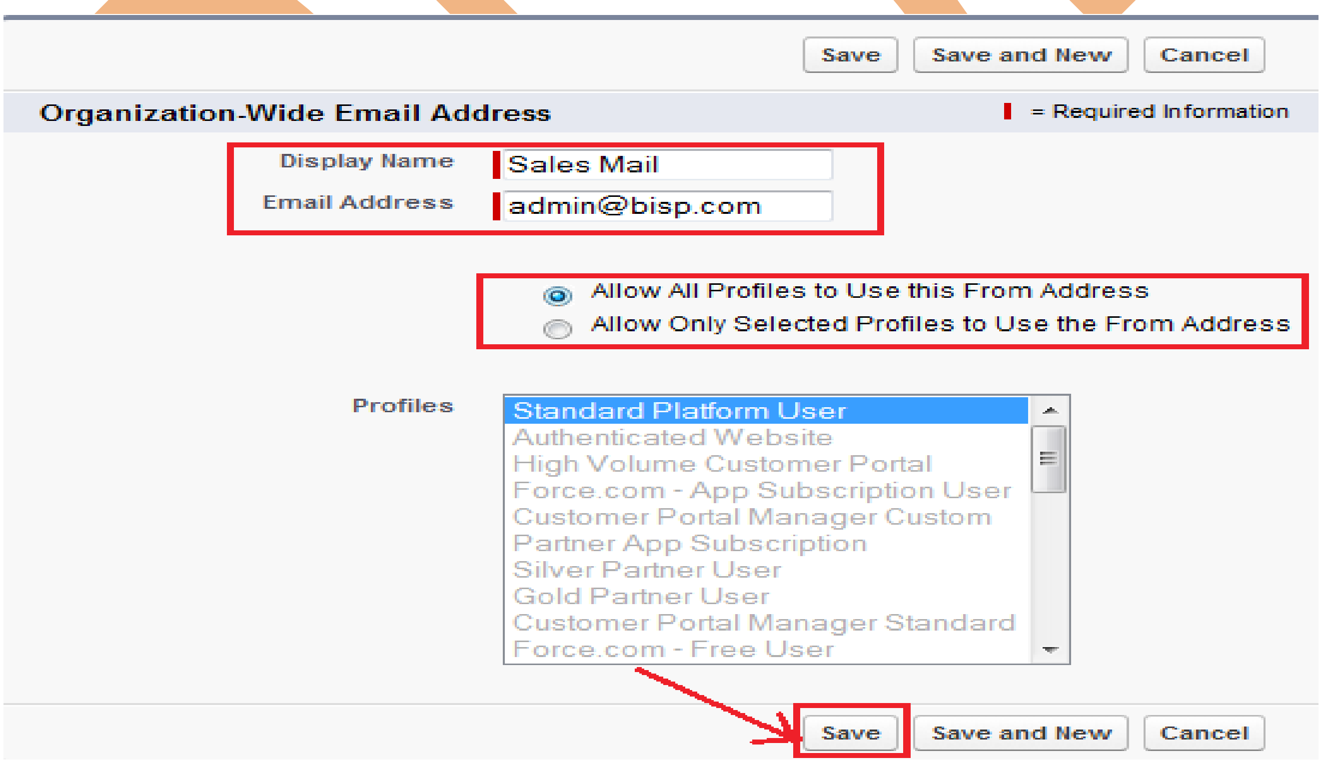
Organization-Wide Email Addresses

An organization-wide email address associates to a single email address to a user profile. Each user in the profile can send email using this address. Users will share the same display name and email address.

Setup > **Administration** > **Email Addresses** > **Organization-Wide Addresses**, click on Add button . you can see below.



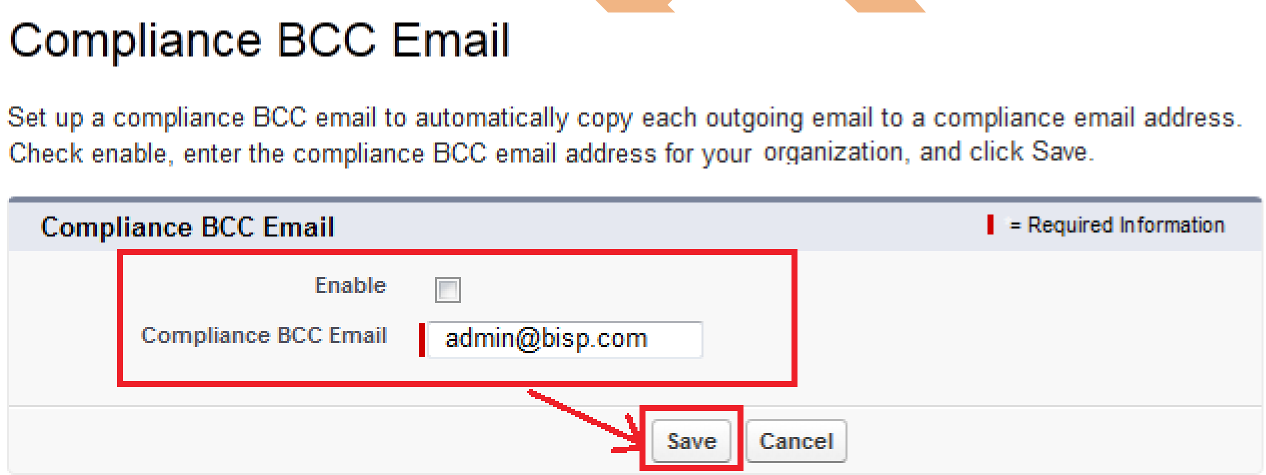
After that click on Add button a new page opens on this page, fill Display Name, Email Address and select User Profiles and click on Save button.



Compliance BCC Email

Set up a compliance BCC email to automatically copy each outgoing email to a compliance email address. Check enable, enter the compliance BCC email address for your organization, and click Save.

Setup > **Administration** > **Email Addresses** > **Compliance BCC Email ,** click on this link then write email address given in text box. Check the check box and after that click on **Save** button.

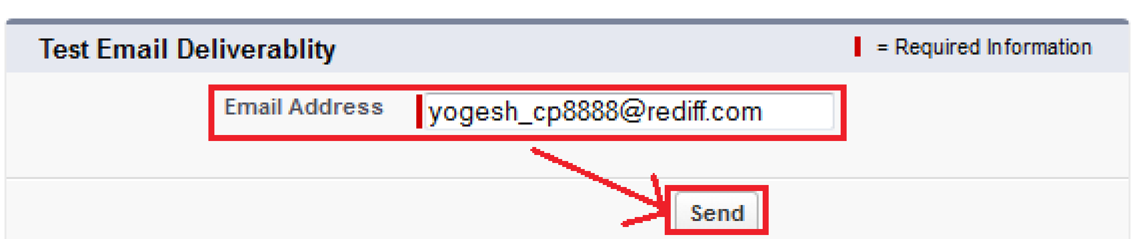


Test Deliverability

Salesforce.com sends email from 52 IP addresses. If your organization blocks any of these IP addresses, users might not receive all email sent from salesforce.com. To verify your organization can receive email from each IP address:

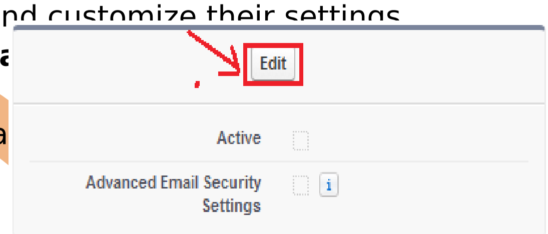
- Enter your business email address below.
- Click Send. Salesforce.com simultaneously sends a test email from all 52 IP addresses to the email address you entered.
- Check the email account to make sure all 52 test emails are received.
- If less than 52 test emails were received, contact your email administrator.

Setup > **Administration** > **Email Addresses** > **Test deliverability,** Write Email address on text box and click on Send button.

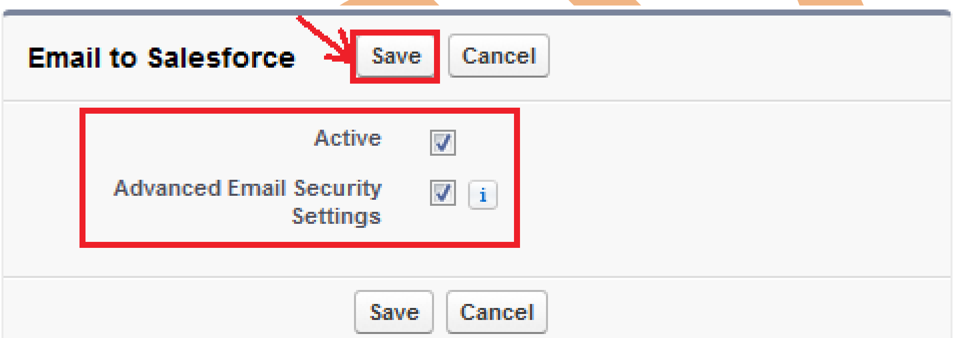


Email to SalesForce

Email to SalesForce allows you to automatically log emails you send from third-party email accounts as activities on lead and contact records in salesforce.com.
After Email to SalesForce is activated, users can access the My Email to SalesForce page to view their unique Email to SalesForce address and customize their settings.
Setup > **Administration** > **Email Addresses** > **Ema**



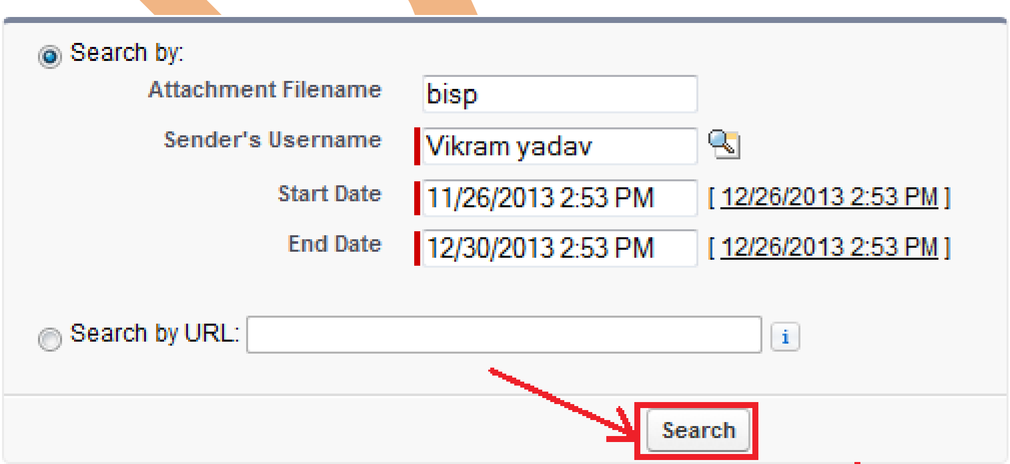
In this page Click on Edit button, checked Active or Adva settings then click on **Save** button.



Delete Attachments Sent as Links

Need to stop email recipients downloading attachments sent, for example, using mass email?
Find and delete email attachments sent as links:

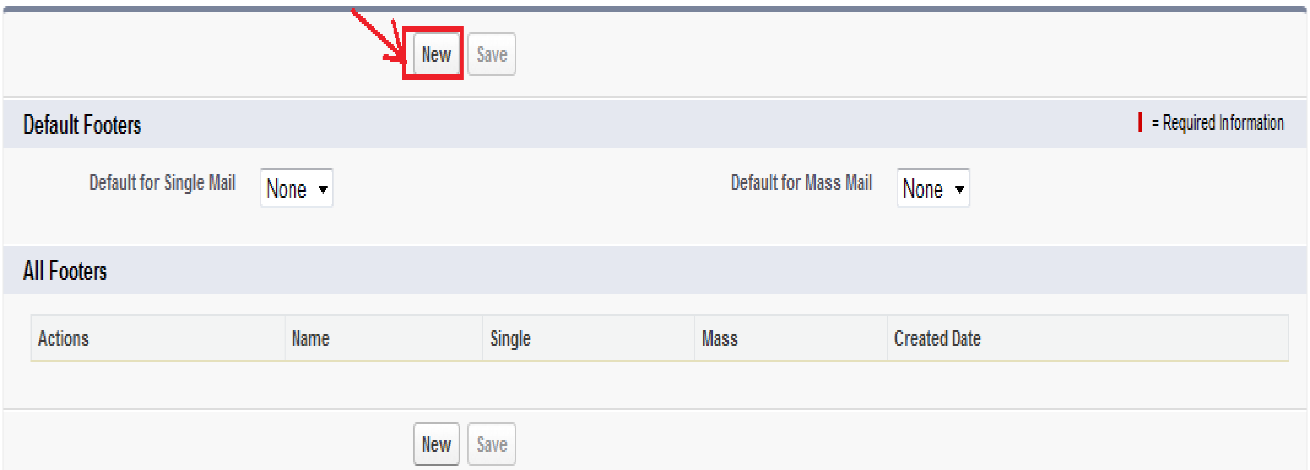
Setup > **Administration** > **Email Addresses** > **Delete Attachments Sent as Links**,



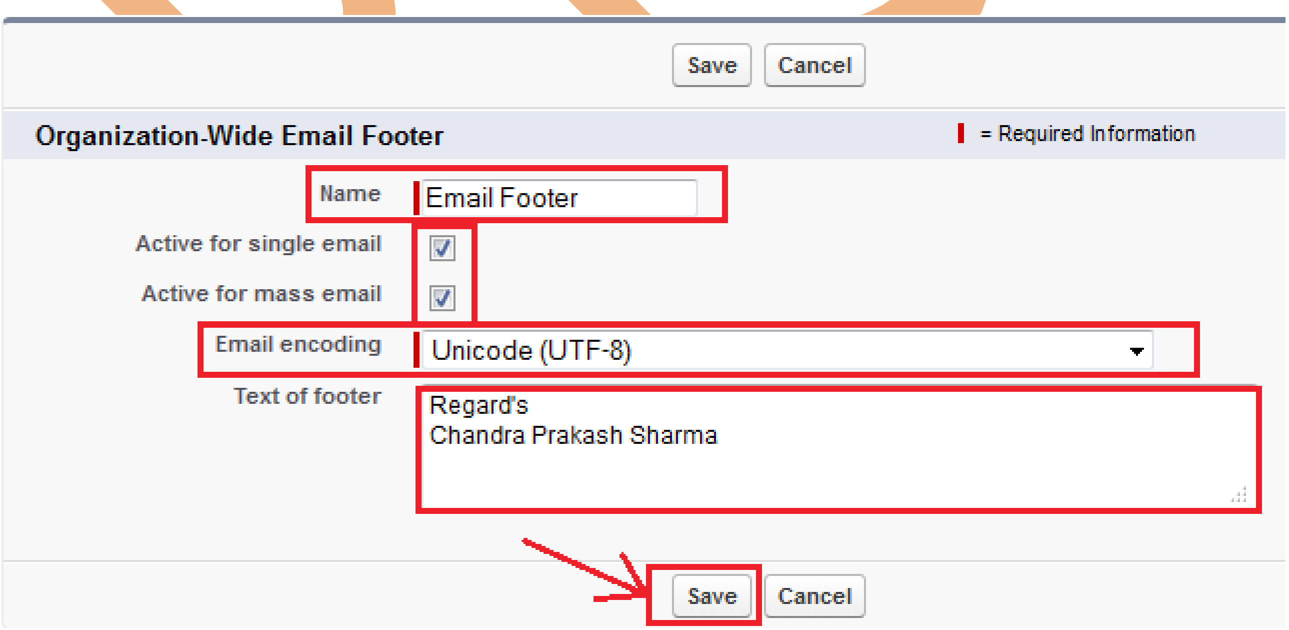
Email Footers

Add footers to emails sent from Salesforce.com. Create default footers—one for single emails and one for mass emails—or create one for each character encoding (General US & Western Europe, Korean, etc). Default footers are used if no footers match the outgoing email's character encoding.

Setup > **Administration** > **Email Addresses** > **Email Footers,** Click on New



After Click on New button. Open new web page on this page, fill all mandatory fields then click on **Save** button.



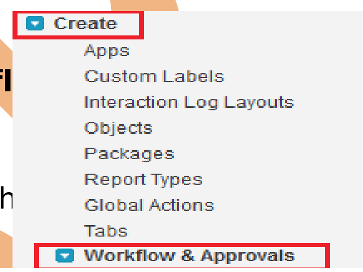
Set Up Workflow Rules

In salesForce.com Workflow assigns a new task to a user, role, or record owner. Example, automatically assigns follow-up tasks to a support representative one week after a case is updated.

- **Assigning of task :** Assign a new task to a user, role, or record owner.
- **Sending email alerts :** Send an email to one or more recipients you specify.
- **Field updates :** Update the value of a field on a record.
- **Outbound message :** Send a secure, configurable API message (in XML format) to a designated listener.

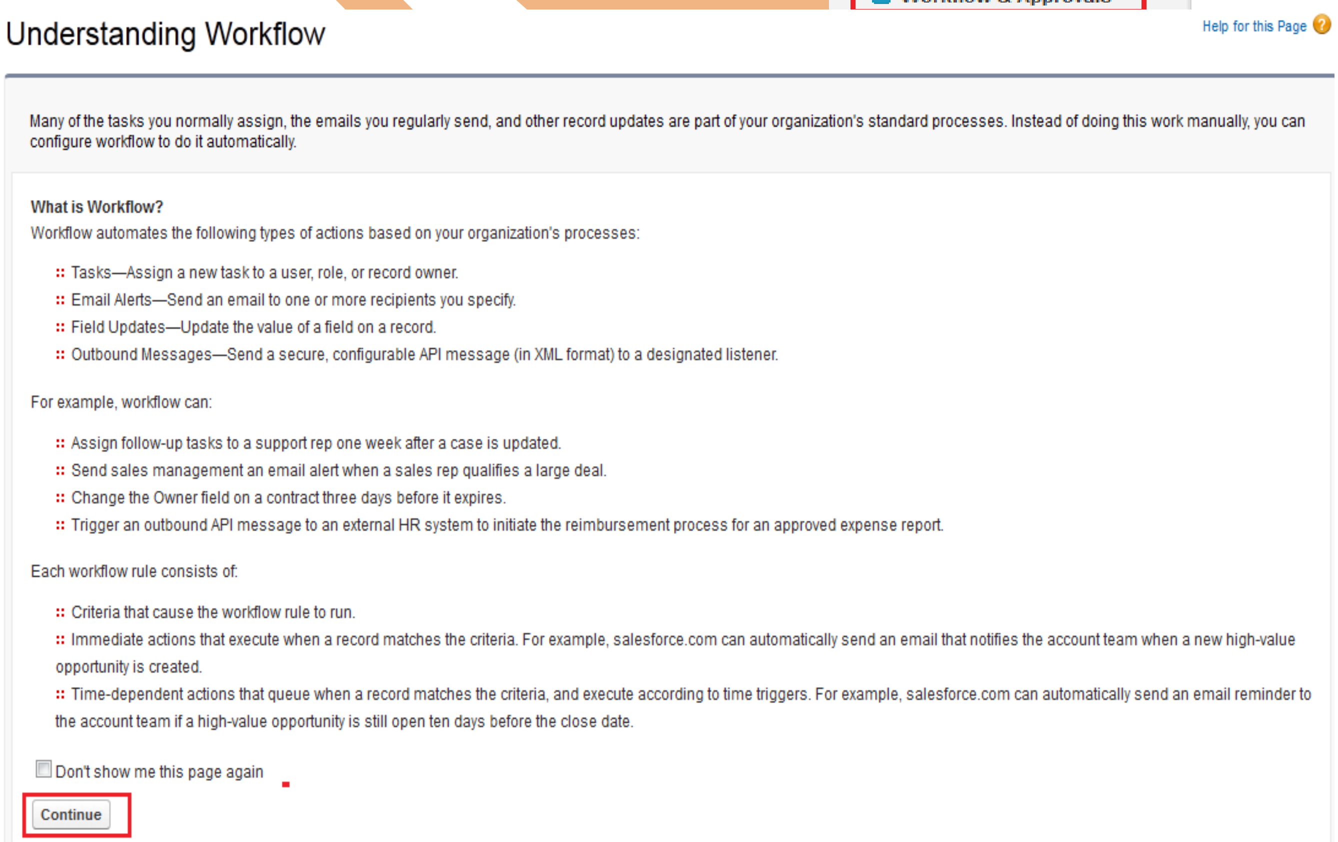
Workflows Rules

Setup > **Create** > **Workflows & approvals** > **Workfl**



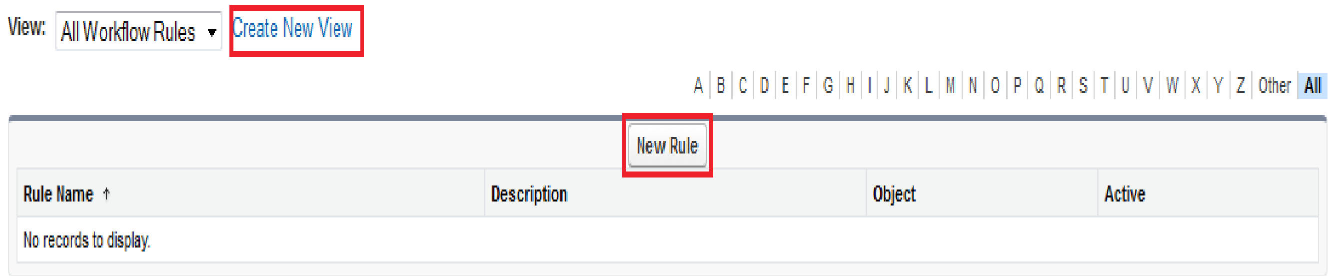
step 1 :

Click on Workflows Rules link then open new page, on th
can see about the workflow Rules.



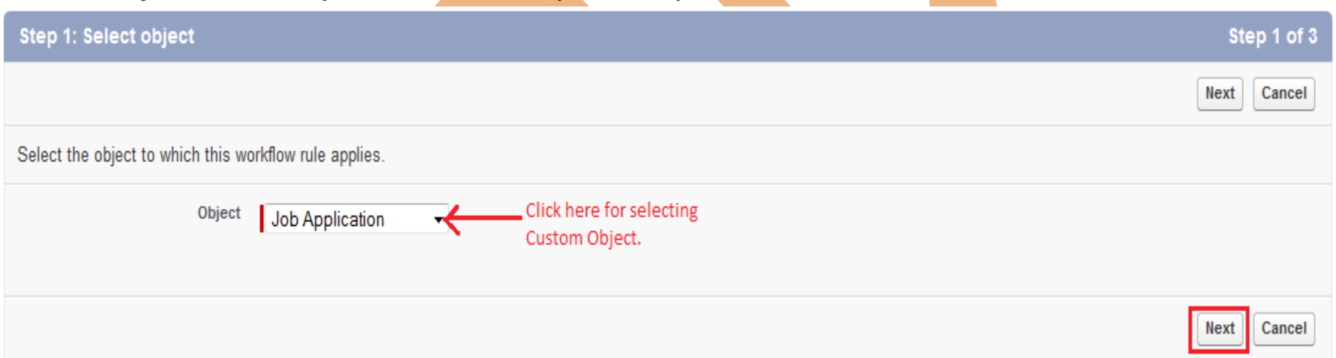
Step 2 :

On this page two options- One for Create New View link . click on this link and you can create new specific view for your organization. Second option is New Rule button. Click on New Rules button.

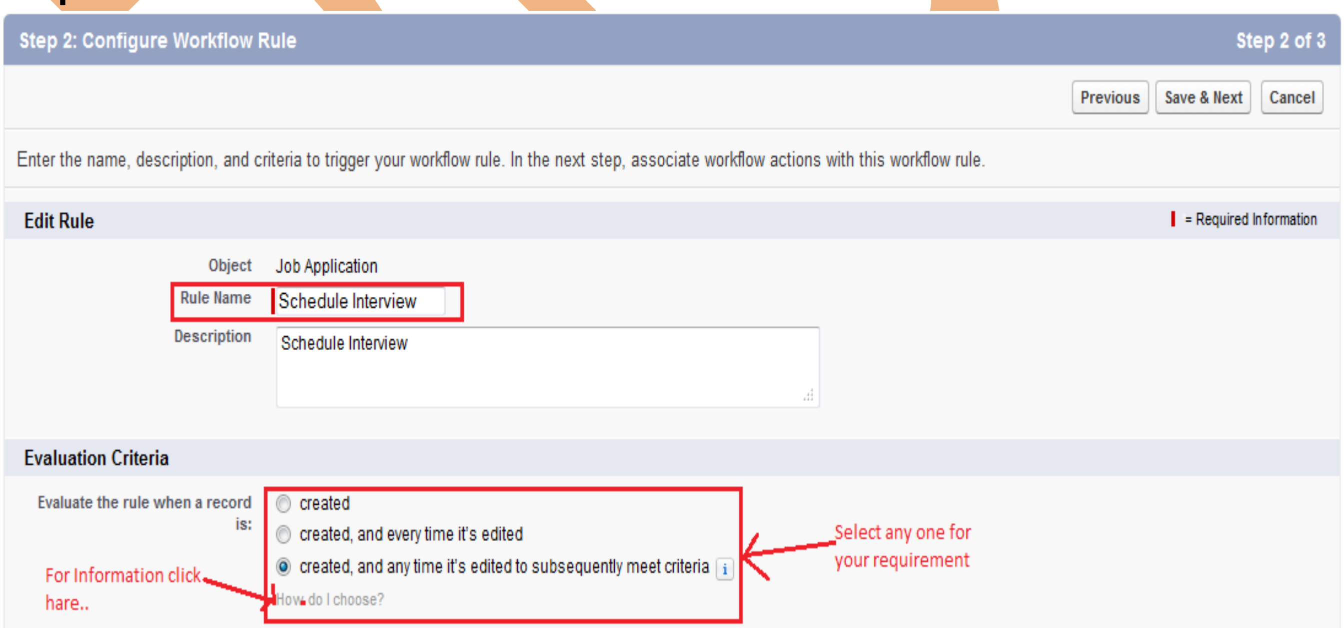


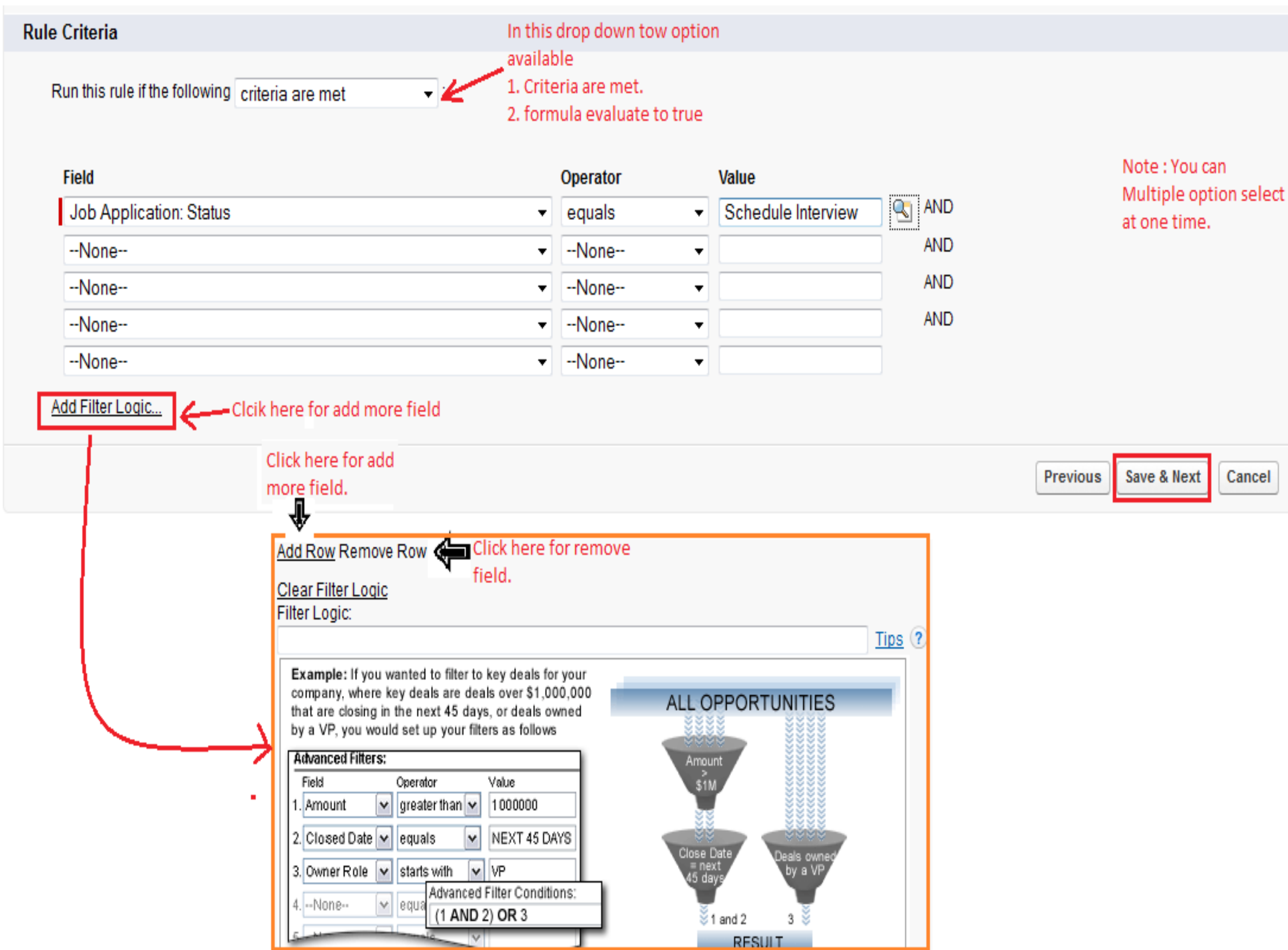
Step 3 :

Select any Custom object, click on Object Dropdown list, then click on **Next** button.



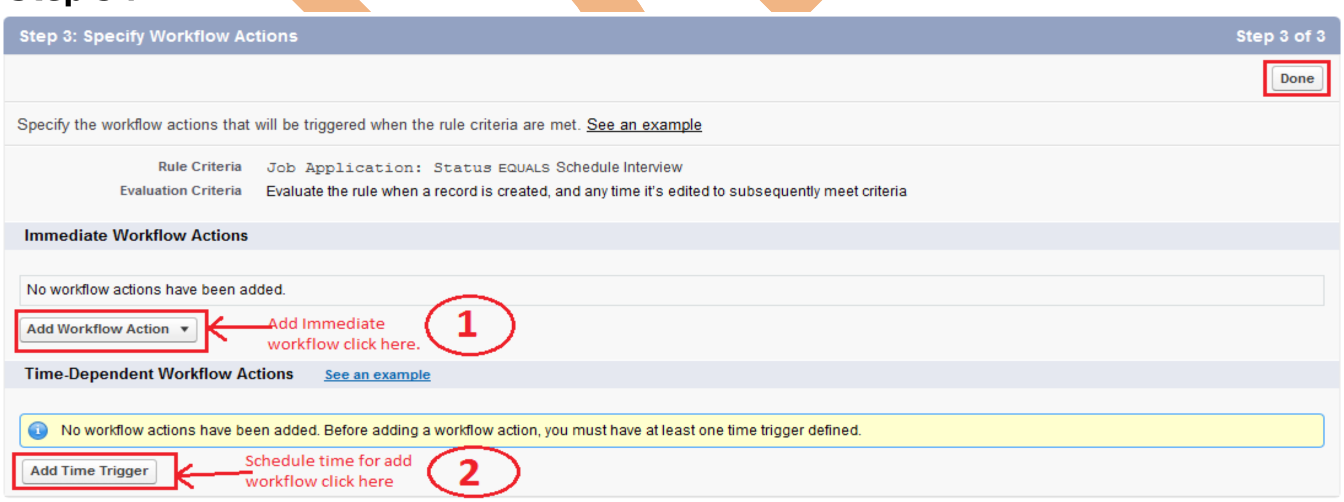
Step 4 :





Fill the Rule Name, select the Evaluate Criteria and then Select Run criteria in drop down option then if you select **Criteria are met** option then you select fields. If you select **Formula evaluate to true** in this option you write formula and click on **Save & Next** button.

Step 5 :

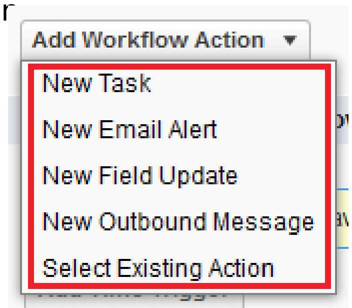


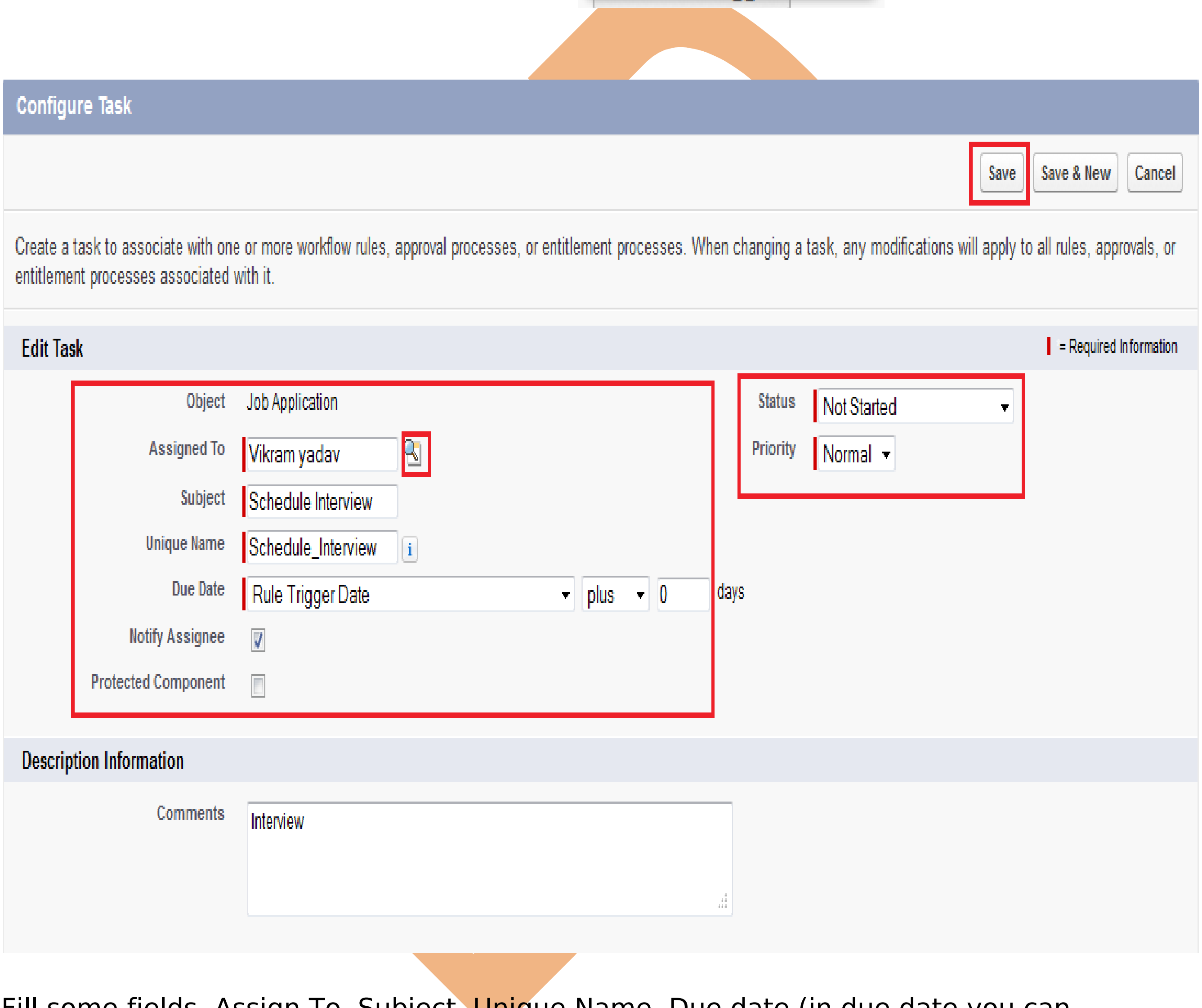
You can choose any one **Add workflow Action** OR **Add Time Trigger**

1 . If you click on Add workflow Action ther

Select any task in available list.

Note :- You can select multiple option.

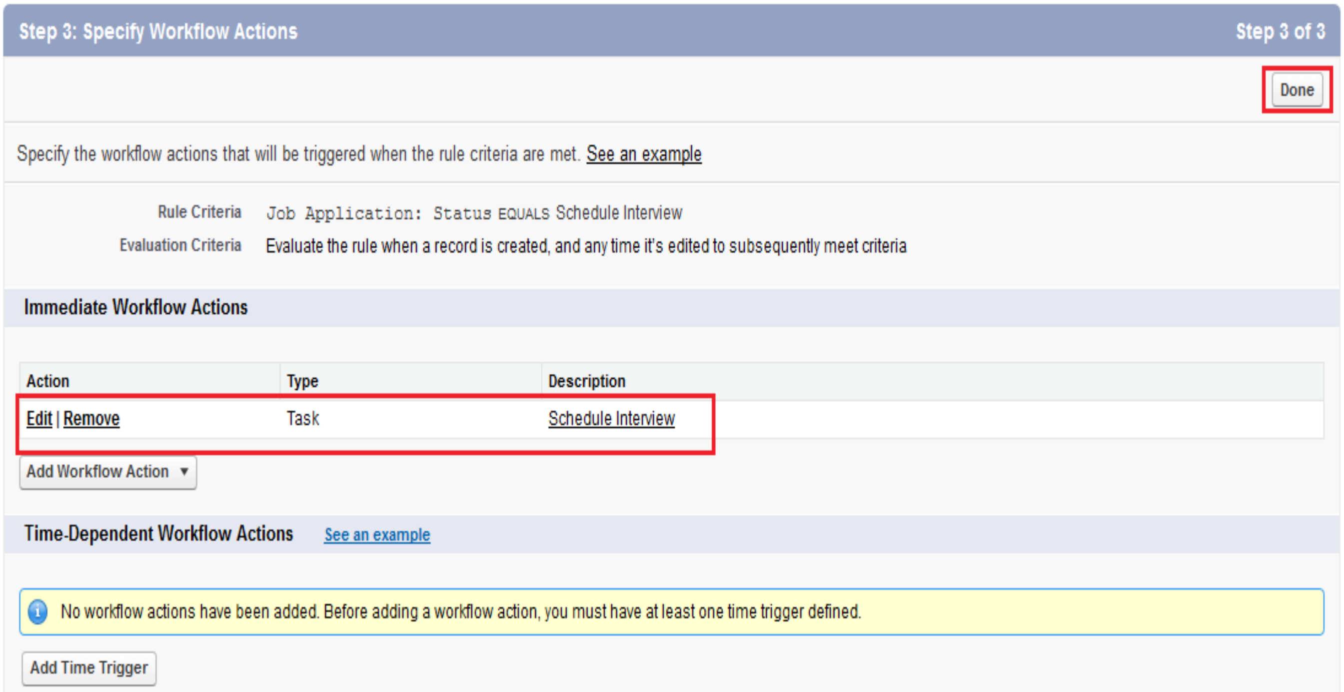




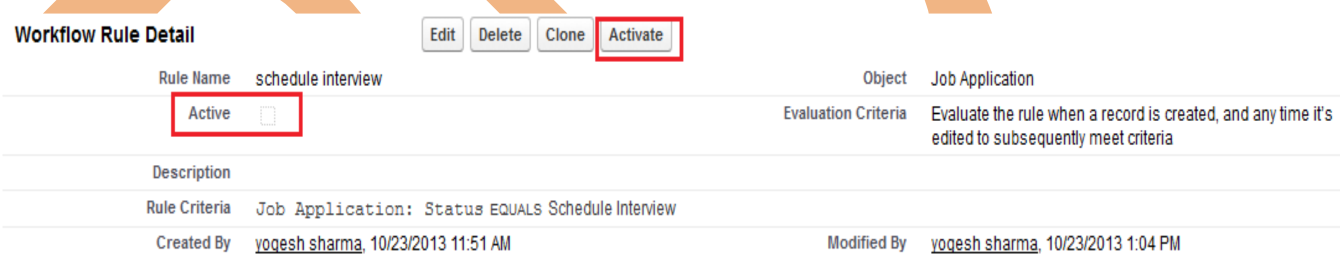
Fill some fields, Assign To ,Subject, Unique Name, Due date (in due date you can choose option for date type), Status, Priority.

After then click on Save button .

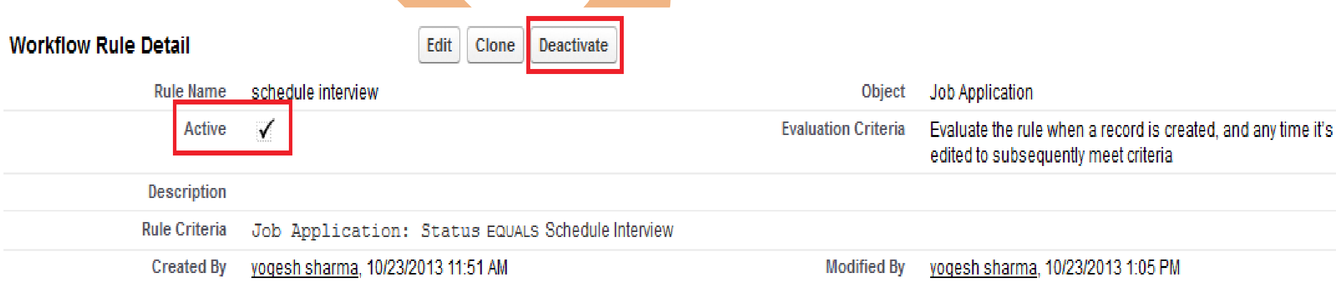
After that you can see your task. You can **Edit** or **Remove** this task. Click on **Done** button for completing this steps.



Note :- Workflows Rules are not activated by default, you have to activate them manually. Click on activate button for active rules. see below.



After Active this workflow see below.
Click to **Deactivate** button for deactivate workflow.

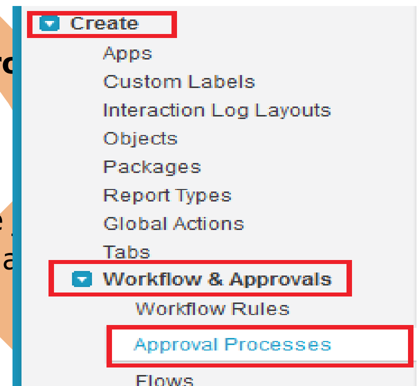


Approval Processes

Another business logic engine of SalesForce is 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.

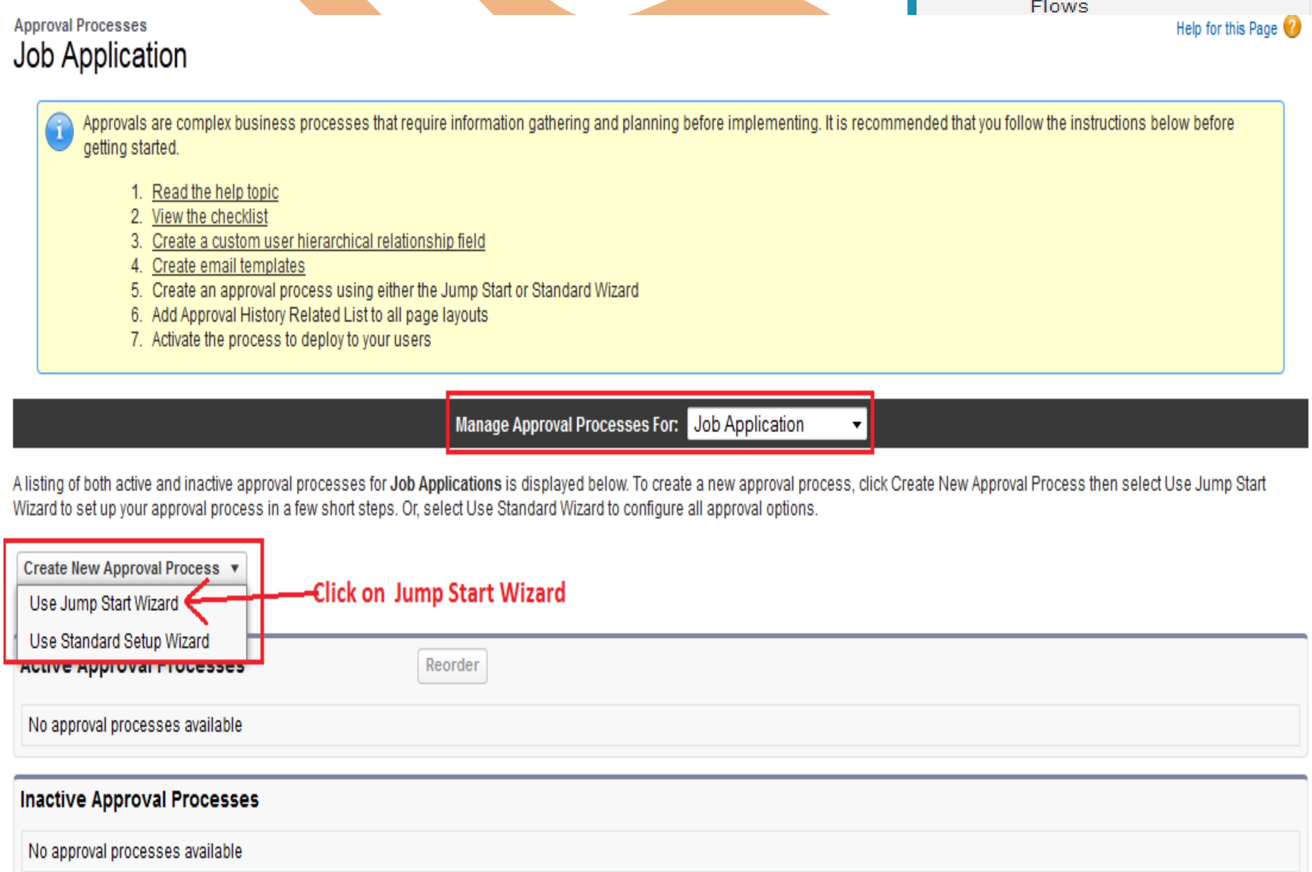
How to Launch the Approval Process Wizard

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 are two options Use J
Wizard and Use Standard Wizard. You can choose Use Standa
Wizard from the drop-down button.

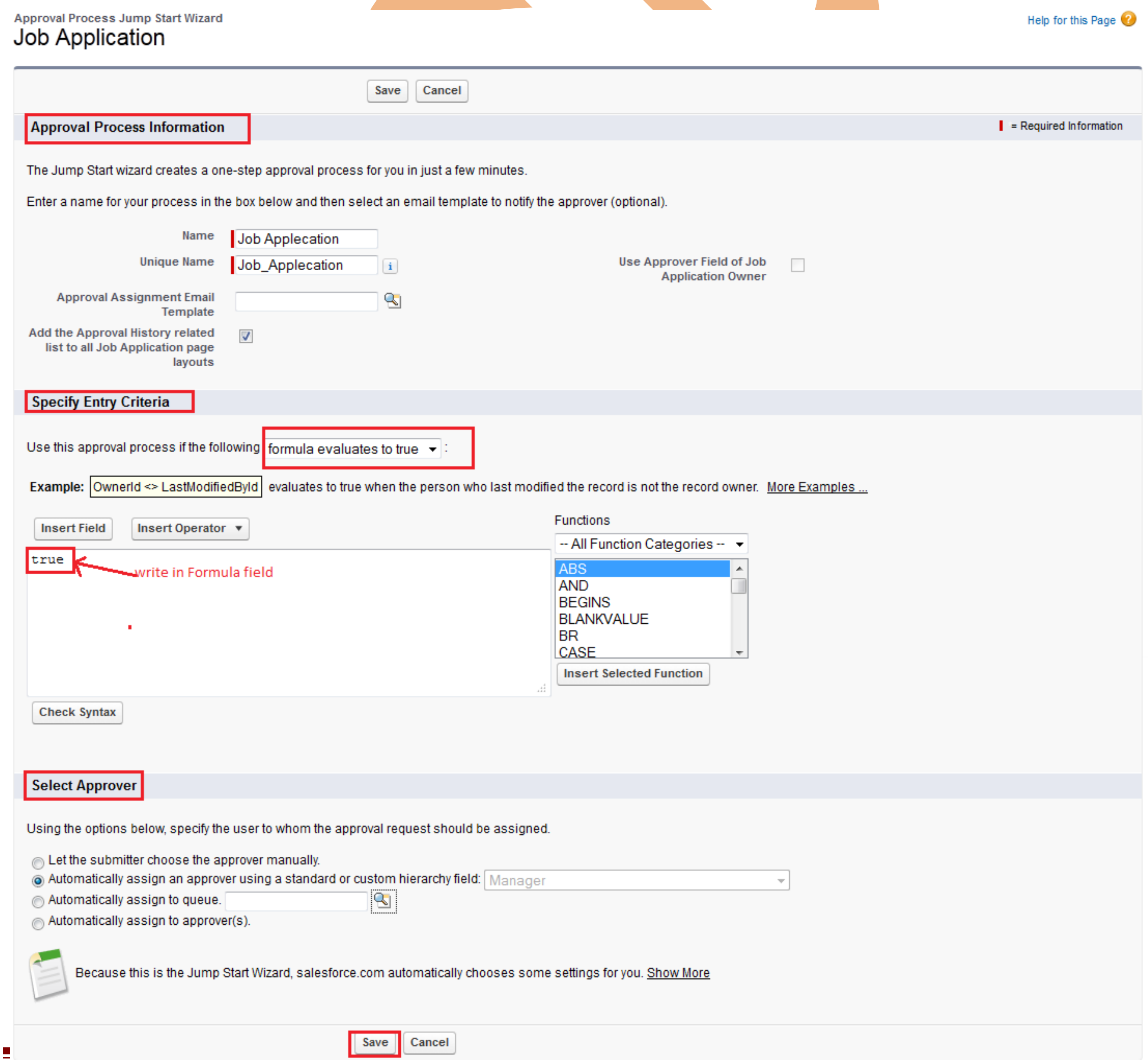


Deference Between Jump Start Wizard and Standard Approval Process Wizard

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 :

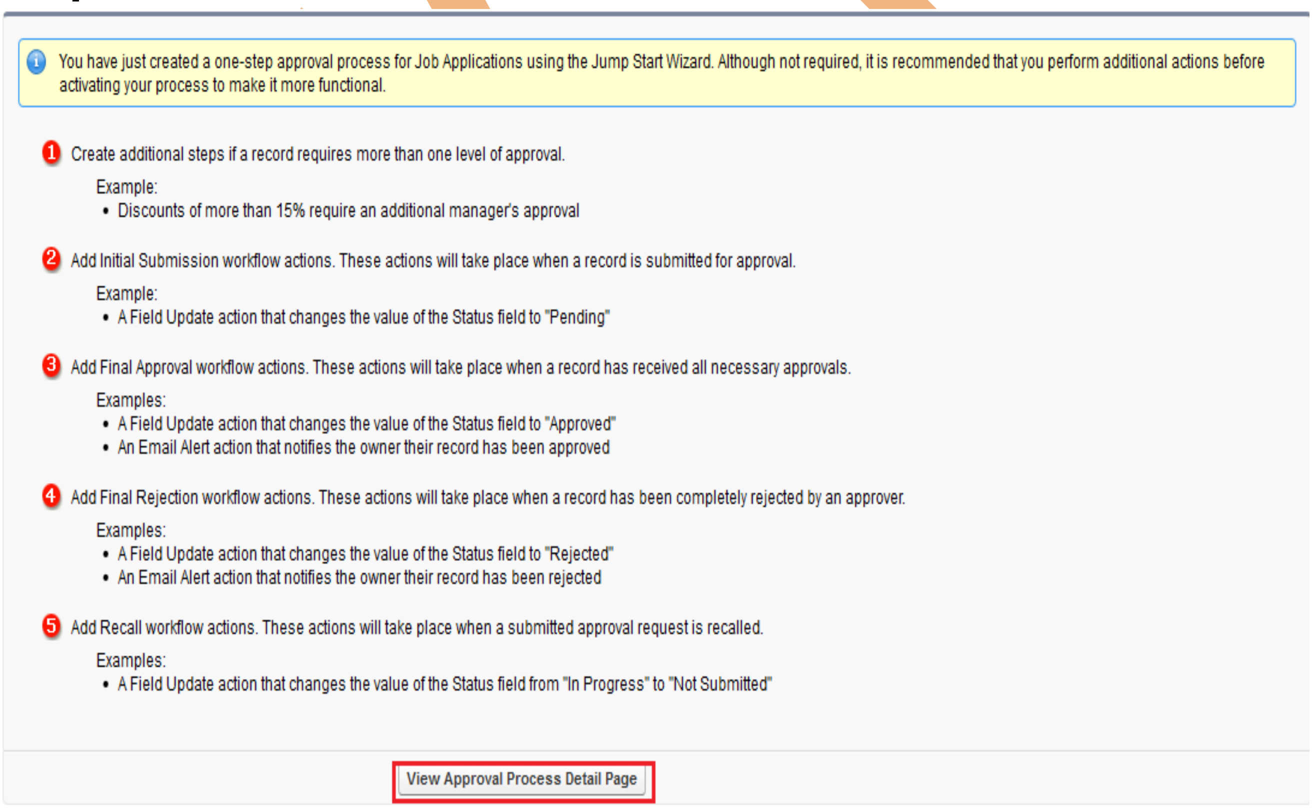


Approval Process Information :
Enter a name for the new approval process.
Enter a unique name, which will be used to refer to this approval process in the Force.com API.
Enter Approval Assignment Email Template this field not mandatory.

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

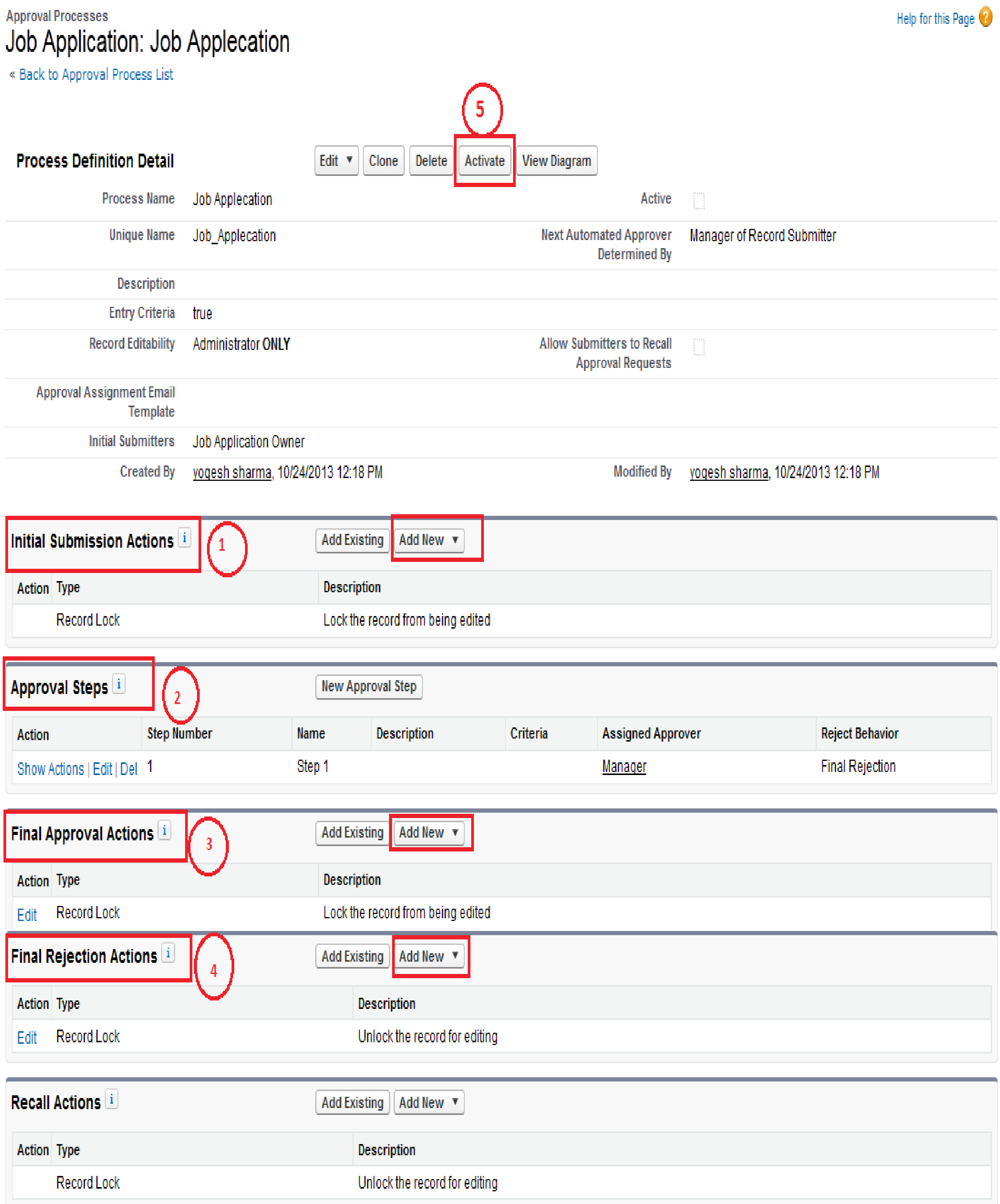
Select Approver :
Using the option select any one option (Ex : Automatically assign an approver using standard or custom hierarchy field.
After that click on **Save** button.

Step 3:-



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

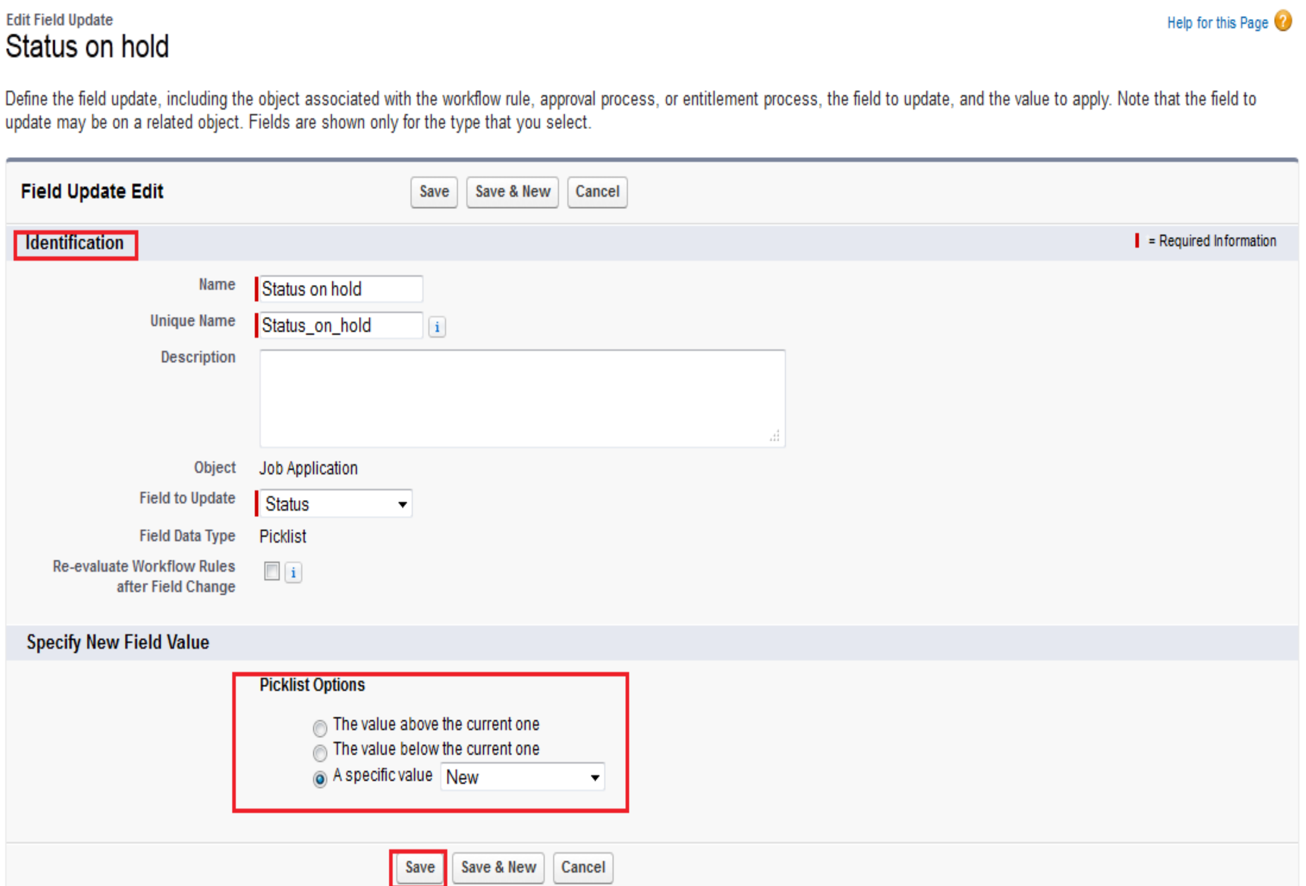
Step 4 :



Approval Processes
Job Application: Job Applecation
« Back to Approval Process List
Help for this Page
5
Process Definition Detail
Edit
Clone
Delete
Activate
View Diagram
Process Name
Job Applecation
Active
Unique Name
Job_Applecation
Next Automated Approver Determined By
Manager of Record Submitter
Description
Entry Criteria
true
Record Editability
Administrator ONLY
Allow Submitters to Recall Approval Requests
Approval Assignment Email Template
Initial Submitters
Job Application Owner
Created By
yogesh sharma, 10/24/2013 12:18 PM
Modified By
yogesh sharma, 10/24/2013 12:18 PM
Initial Submission Actions
1
Add Existing
Add New
Action
Type
Description
Record Lock
Lock the record from being edited
Approval Steps
2
New Approval Step
Action
Step Number
Name
Description
Criteria
Assigned Approver
Reject Behavior
Show Actions | Edit | Del
1
Step 1
Manager
Final Rejection
Final Approval Actions
3
Add Existing
Add New
Action
Type
Description
Edit
Record Lock
Lock the record from being edited
Final Rejection Actions
4
Add Existing
Add New
Action
Type
Description
Edit
Record Lock
Unlock the record for editing
Recall Actions
Add Existing
Add New
Action
Type
Description
Record Lock
Unlock the record for editing

1. Initial Submission Actions : Click on Add New button. It opens in dropdown of four options

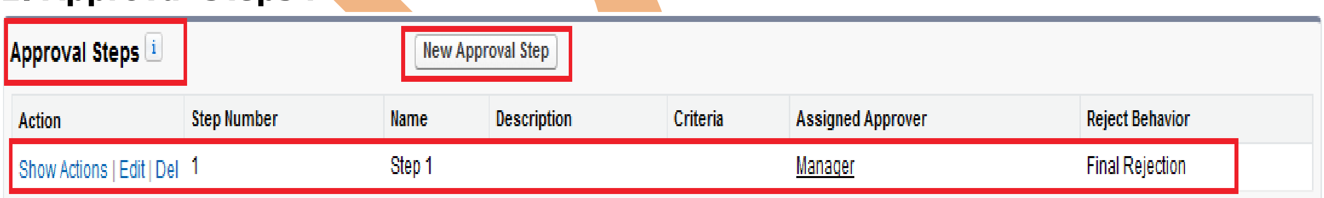
Task, Email Alert, field Update, Outbound Message. select any one option. (Ex : Field Update).



Fill All Mandatory field's in Identification and select Specify New Value select in picklist option .

Then click on **Save** button.

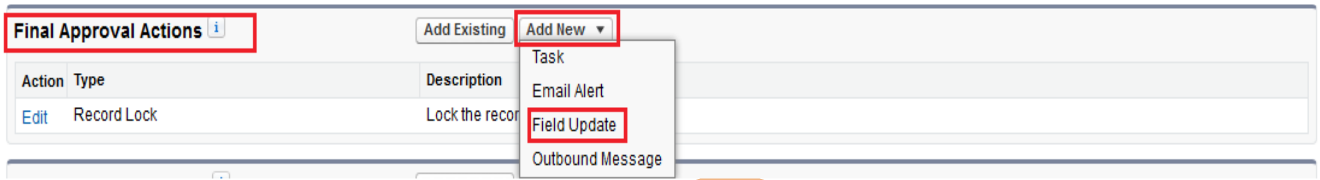
2. Approval Steps :



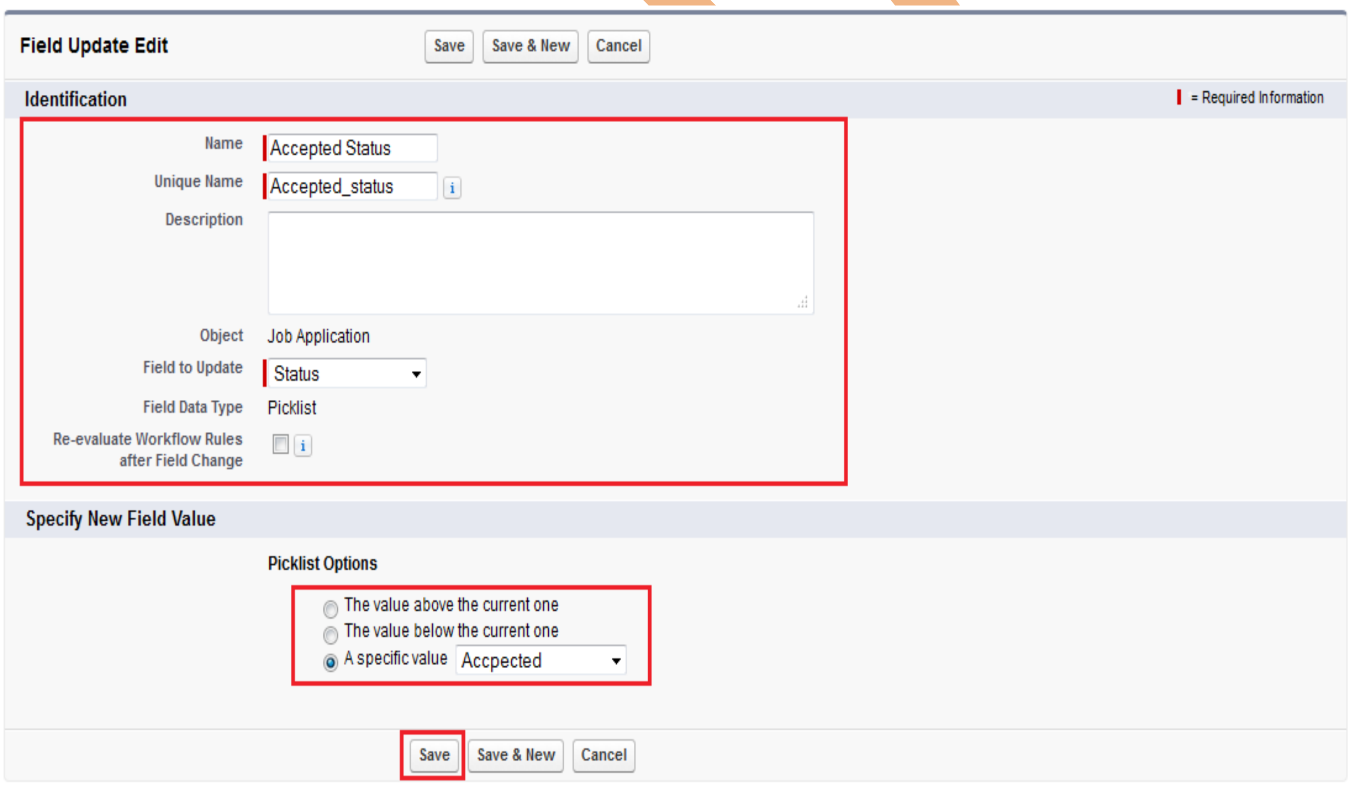
You can give approval setting by using Approval Steps, there is who can approve. and also add multiple Approval candidate by click New Approval Step.

(Ex: I will Assign Approver authority give on Manager.)

3. Final Approval Actions :



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

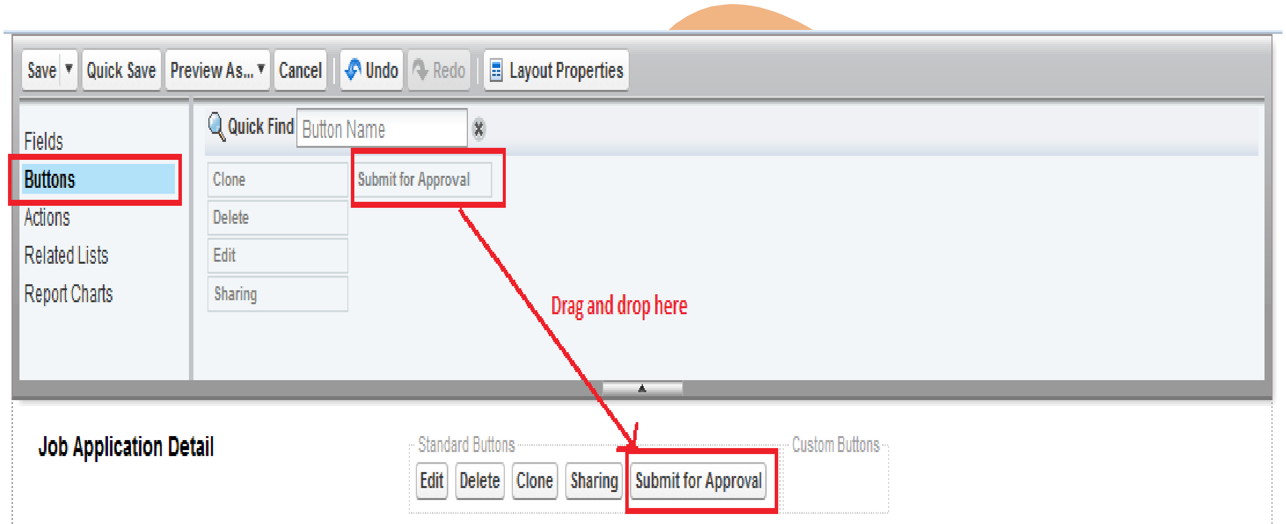


Fill All Mandatory field's in Identification and select Specify New Value select in picklist option .
Then click on **Save** button.

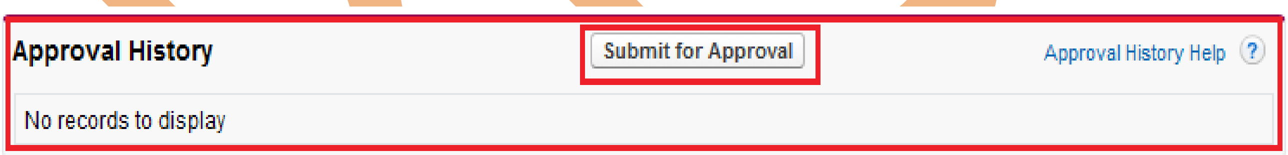
4. Final Rejection Actions :
follow previous step .

5. Click on Active Button :
Finish all steps and then click on Active button to active this Approval Process.

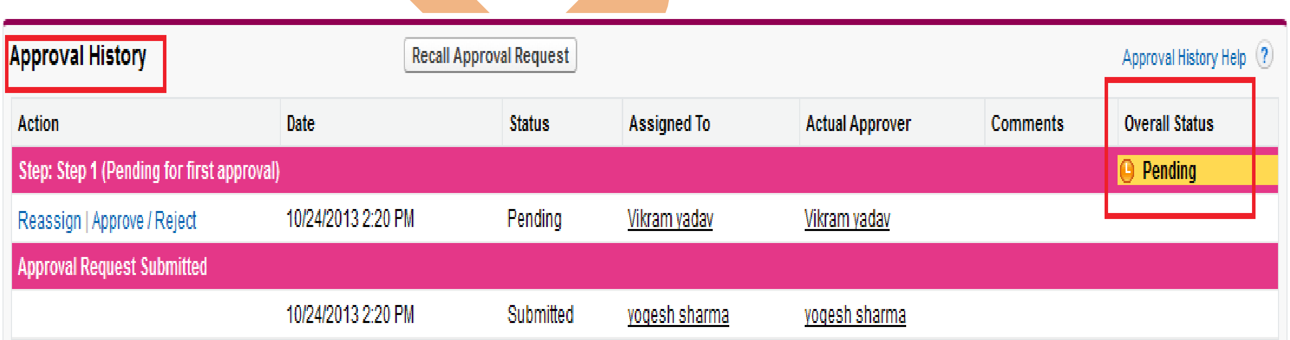
Step 5 :
After that you need to set page layout in Custom object (Ex: Job applications)
Click on Custom object(Job Applications) > Select any Field(Job application) > then click on **Edit Layout** link.
Click on **Button** link then **Submit for Approval** button you can drag and drop.



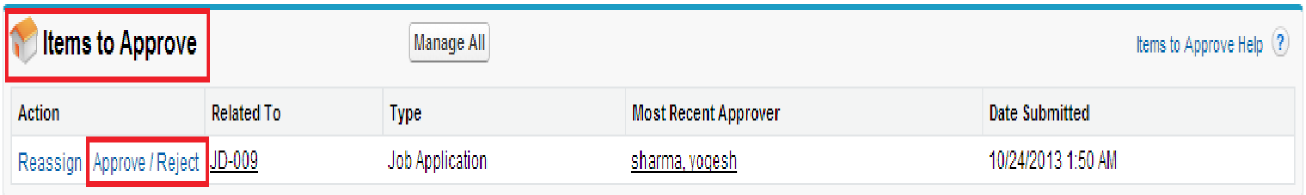
After that click on save button and then click on any job application field, after that scroll down and you can see Approval History. as below.
and Click on **Submit For Approval** button for submit this Approval process.



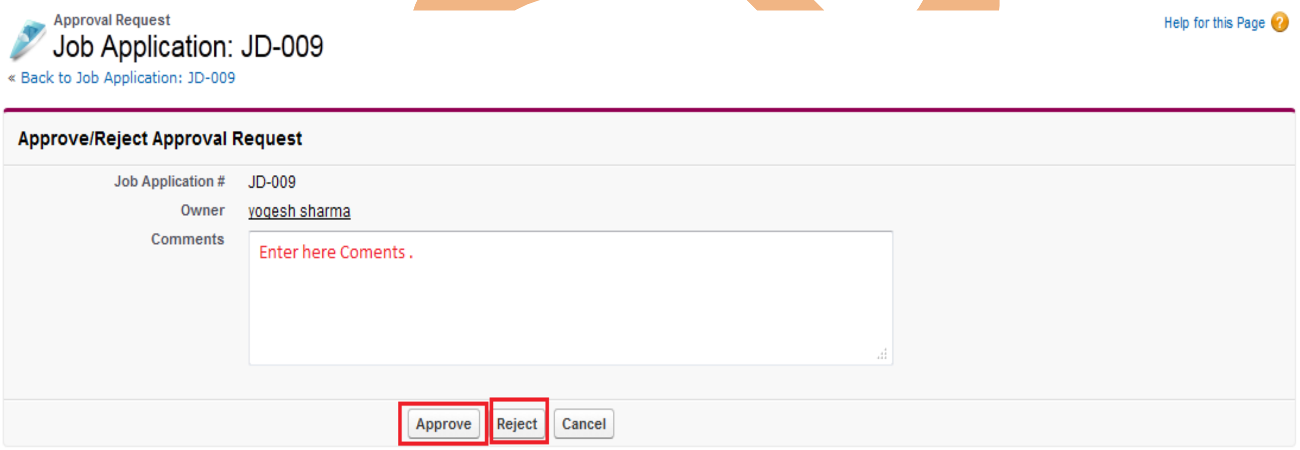
After click Submit for Approval button Approval History looks like. see below.
There you can see Overall Status is Pending.



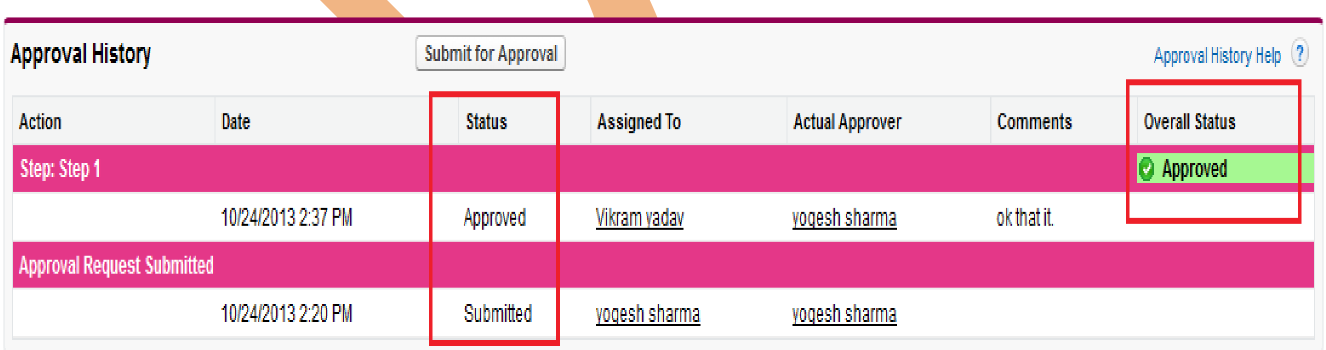
Step 6 :
This screen is Manager's screen. you can see below.
Click on **Approve/Reject** link to Manage approve or Reject this Process.



After this if you 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 your page's approve status will be changed, see below.
Then Overall Status is Approved.



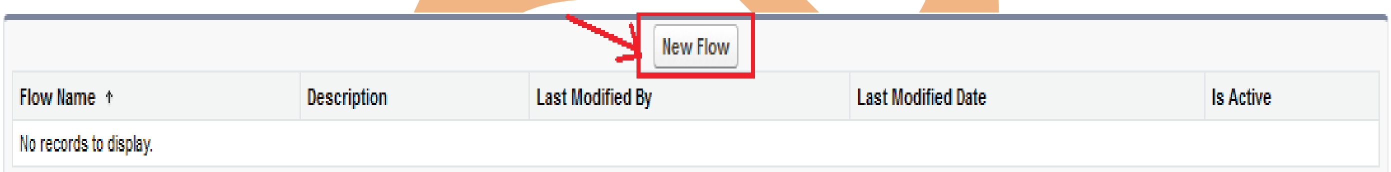
Flows

In SalesFroce.com Visual Workflow lets you easily build and manage flows, which guide users through screens that collect and display information, create and update SalesForce records, and execute logic based on user input.

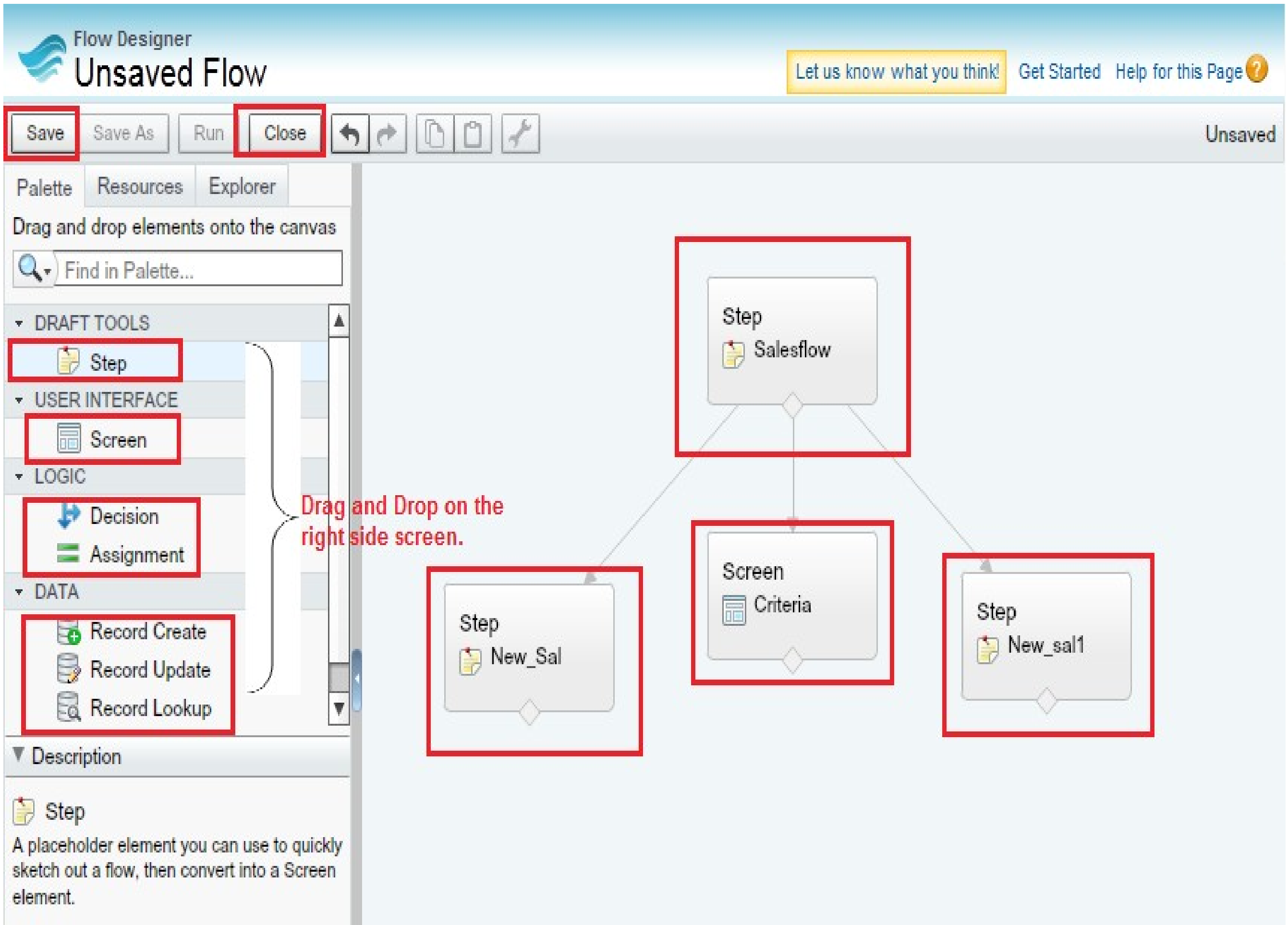
Administrators design and build flows using the Flow Designer’s simple drag-and-drop user interface, then activate, manage, and maintain them. Users can run an active flow from a custom button, tab, link, or the flow URL.

How to Create Flows :

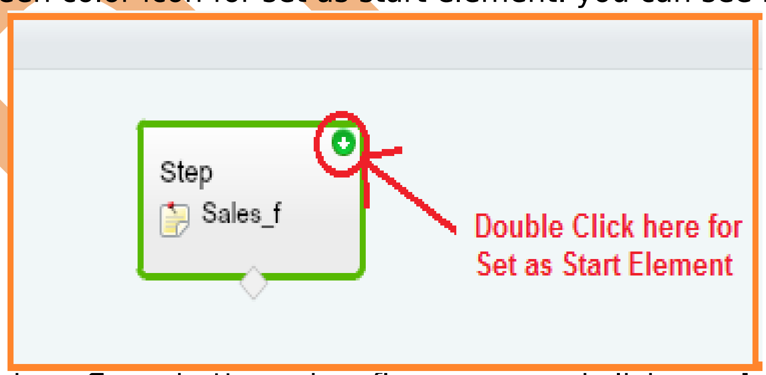
Setup > **Create** > **Workflow & Approvals** > **Flows**, Then click on New Flow, See below.



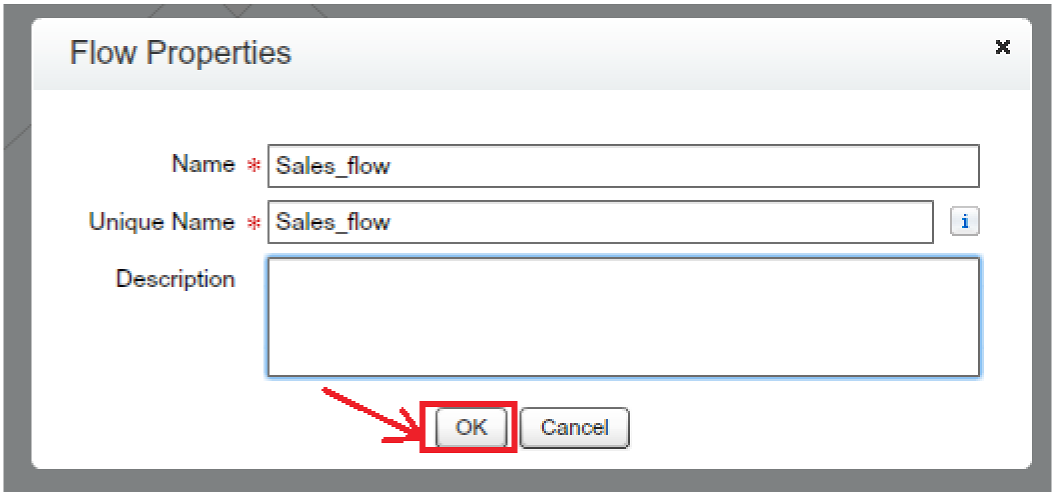
Step 1 :



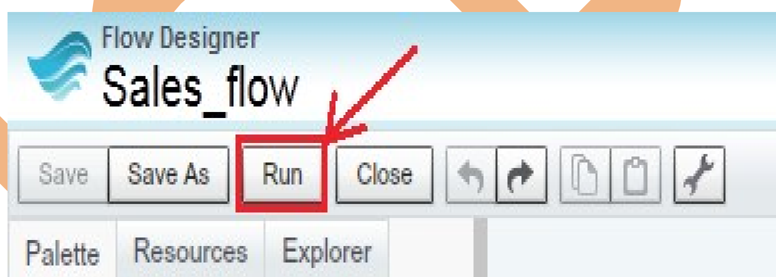
Note : Before you click on Run button makes sure to set start element. how to set start element, go to any drag and drop element and simply mouse hover on the element show click on green color icon for set as start element. you can see below.



Create flow after that. click on **Save** button, give flow name and click on **ok** button.

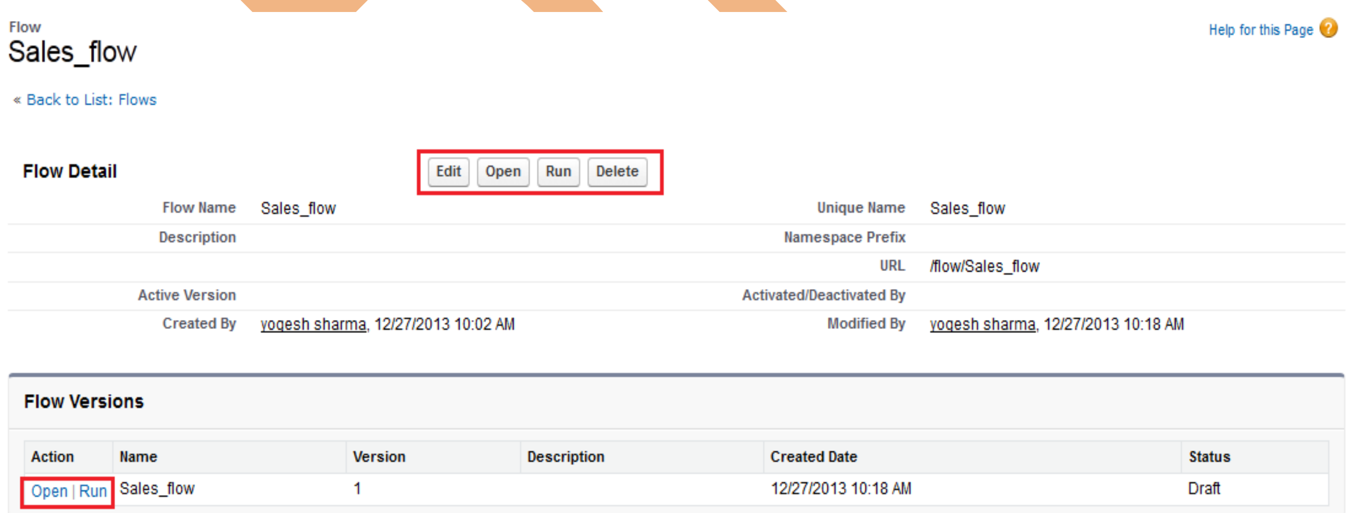


After that you can see Run button is Enable. Click on Run button for this flow.



Click on Run button, open new web page on this page you can see flow fields.

After save this flow you can Edit, delete ,Run and open this flow click on related action button.
you can see below.



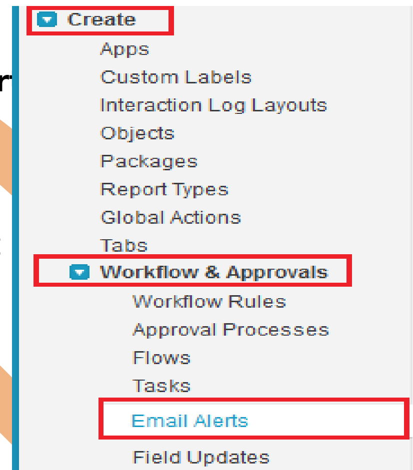
Email Alerts

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

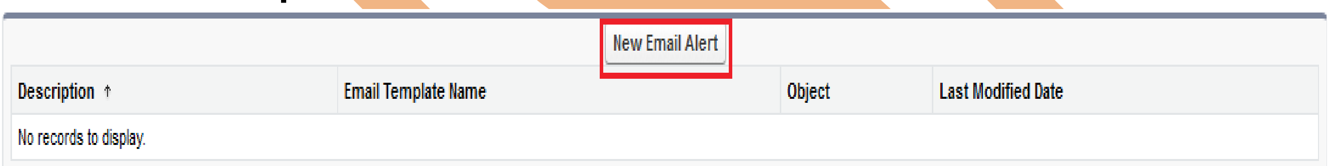
Step > **Creates** > **Workflow & Approval** > **Email Aler**



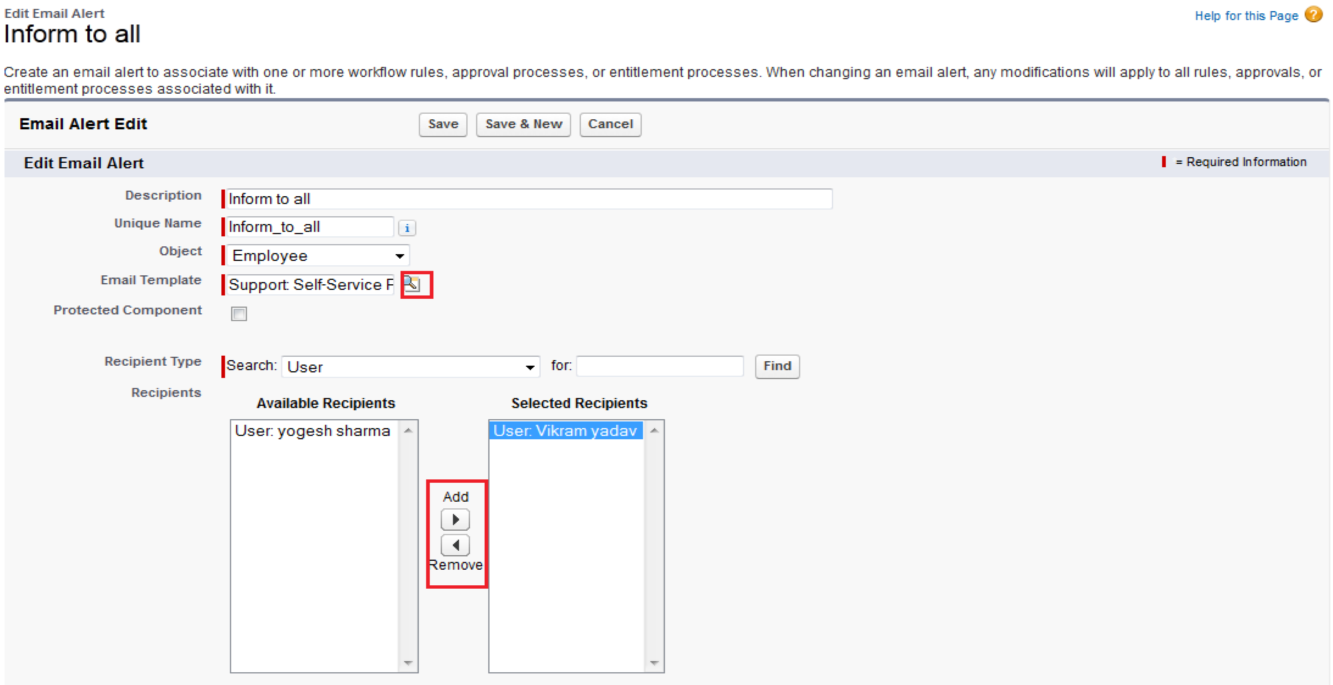
From this page you can :

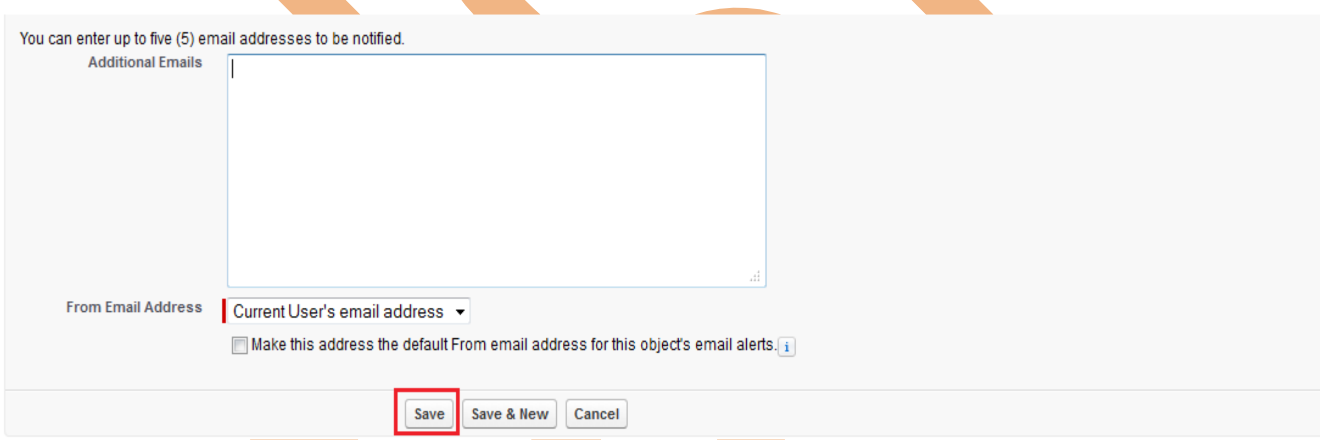
- Create a new email alert.
- Select an existing email alert to view details about cloned email alert, or view all the rules using it.
- Edit an existing email alert.
- Delete an email alert.

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.

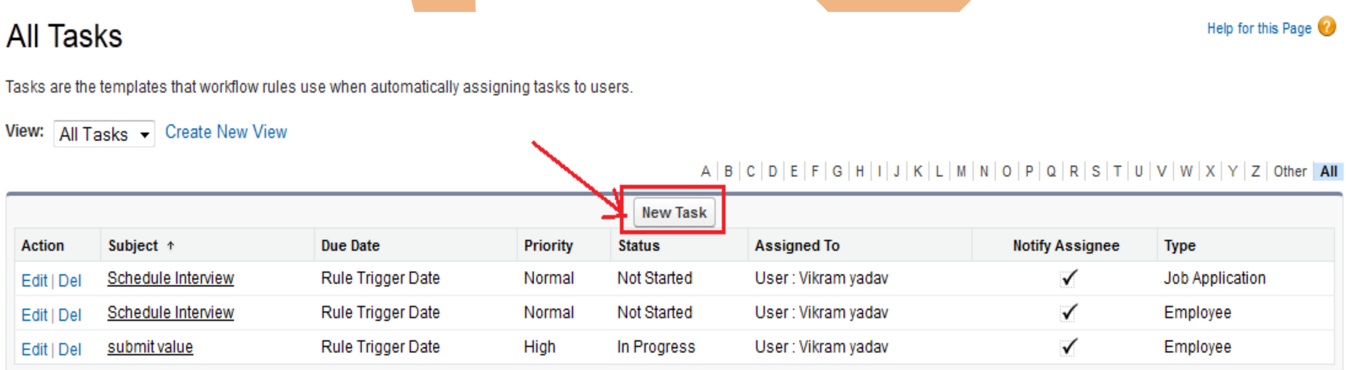
9. You can change the From Email Address, selecting in dropdown list.
10. Click **Save** button.

Workflow Daily Email Limit

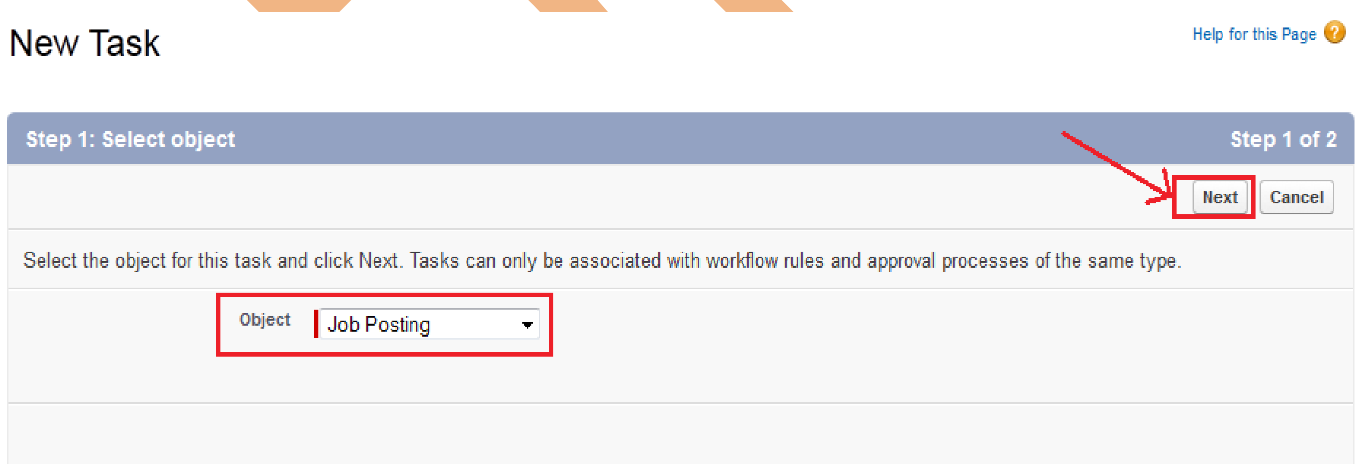
The daily limit for emails sent from workflow and approval-related email alerts is 1000 per standard SalesForce license per organization. The overall organization limit is 2000000. If the default workflow user isn't set, then the warning email is sent to an active system administrator.. When the daily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

Tasks

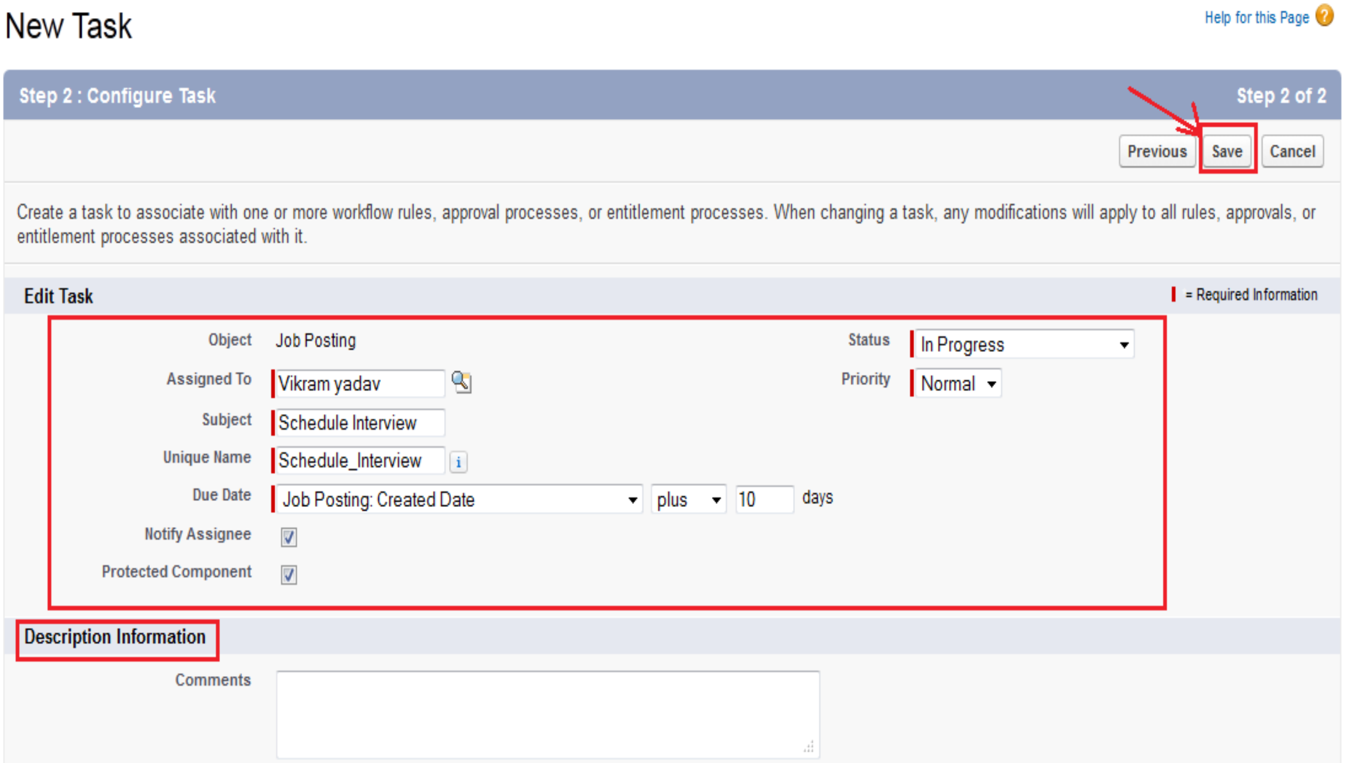
Tasks are the templates that workflow rules use when automatically assigning tasks to users.
Step > **Creates** > **Workflow & Approval** > **task** , Click on **New Task** button.



Step 1 : Select object name and click on **Next** button.



Step 2 : Fill Assign to, subject , due date, status, priority, checked Notify Assignee, protected component then click on **Save** button.

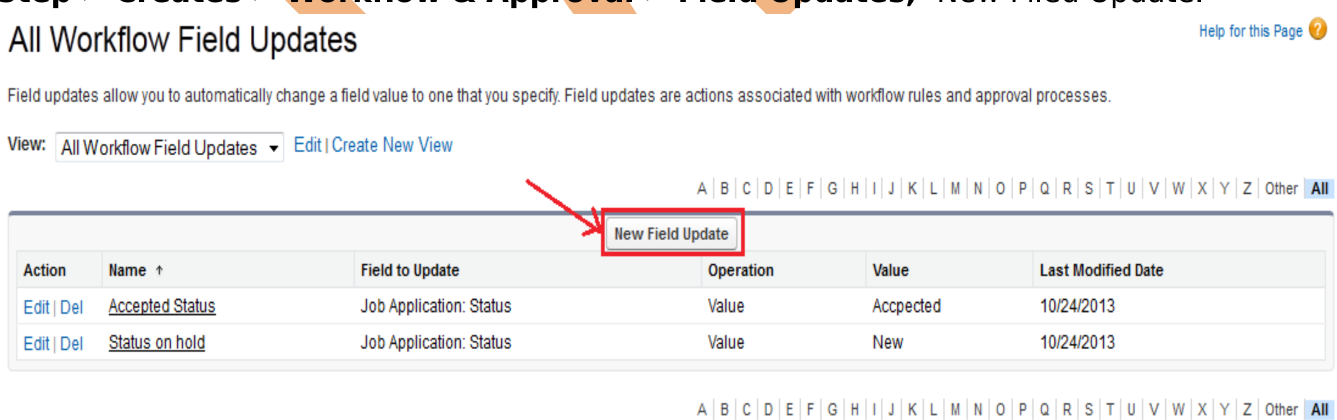


After save, you can Edit, Delete , or clone this Task.

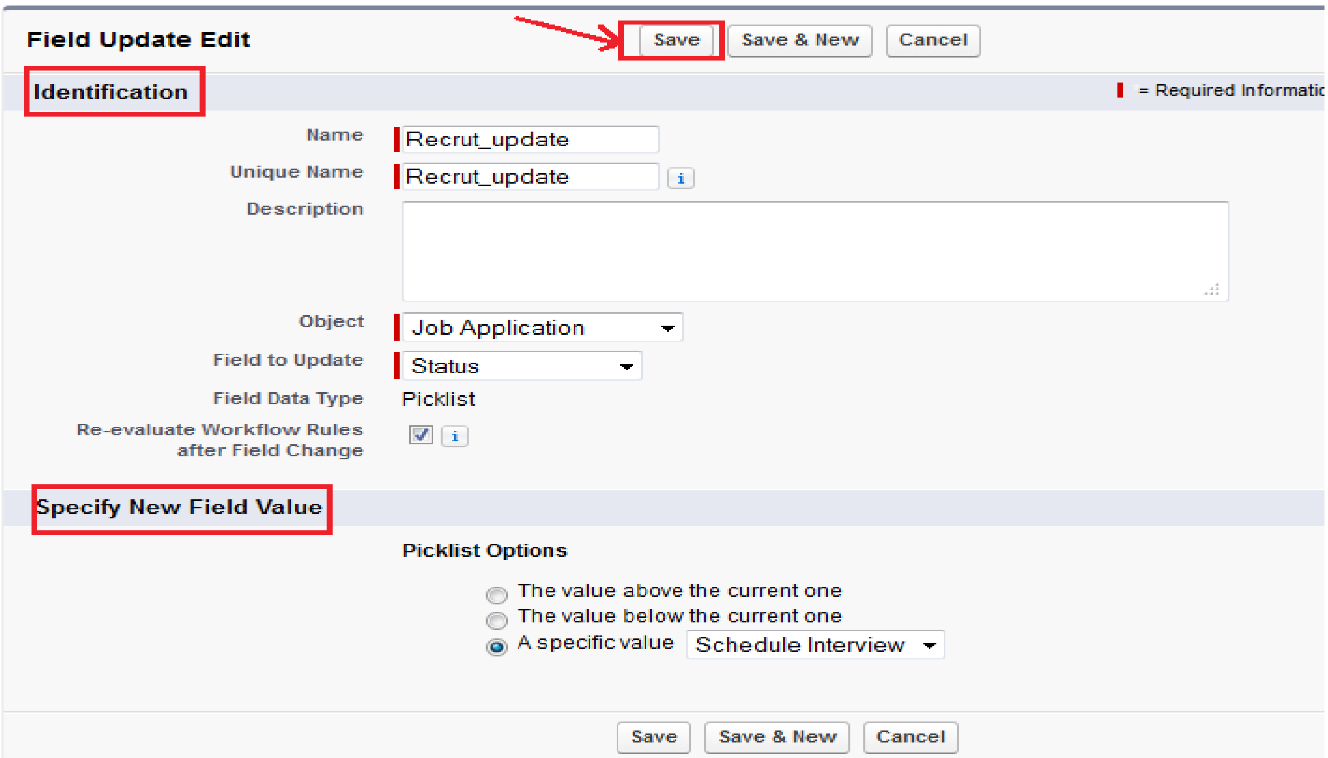
Field Updates

Field updates allow you to automatically change a field value to one that you specify. Field updates are actions associated with workflow rules and approval processes.

Step > **Creates** > **Workflow & Approval** > **Field Updates,** New Filed Update.



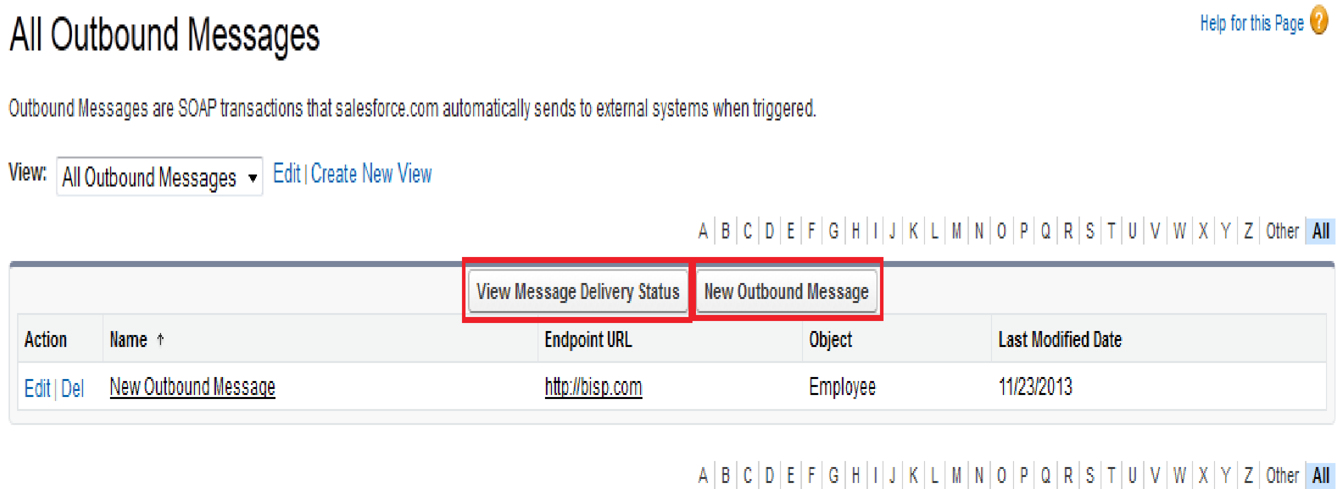
Step 1 : Fill all fields, select object name filed status and click on Save button. after saving this page you can Edit or Delete this page.



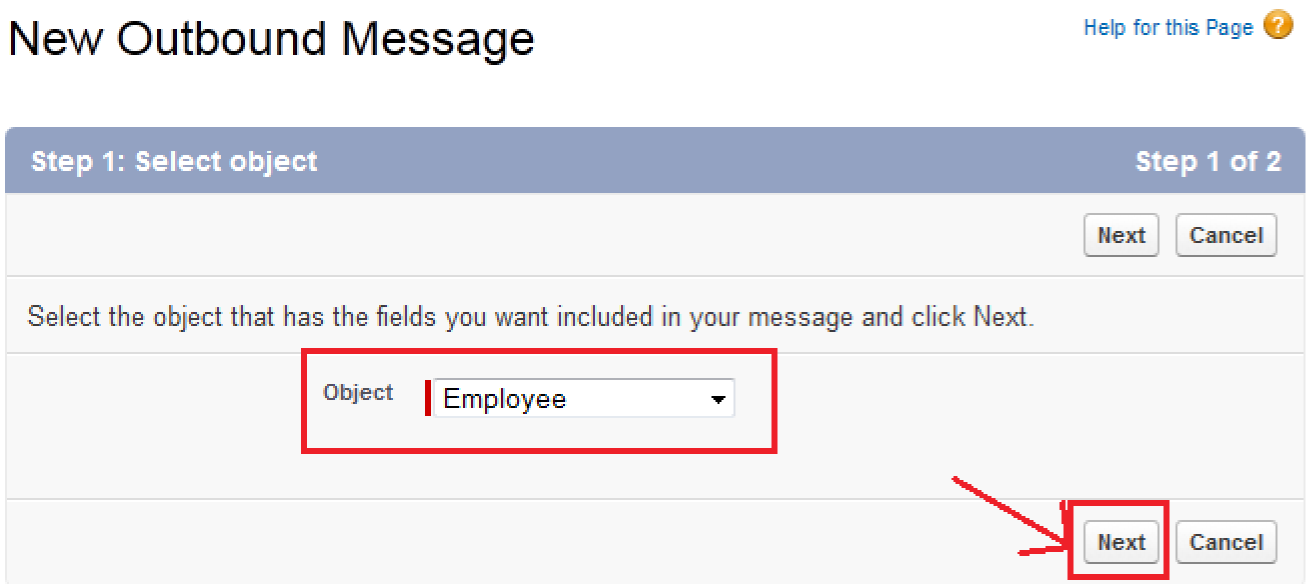
Outbound Messages

Outbound Messages are SOAP transactions that salesforce.com automatically sends to external systems when triggered.

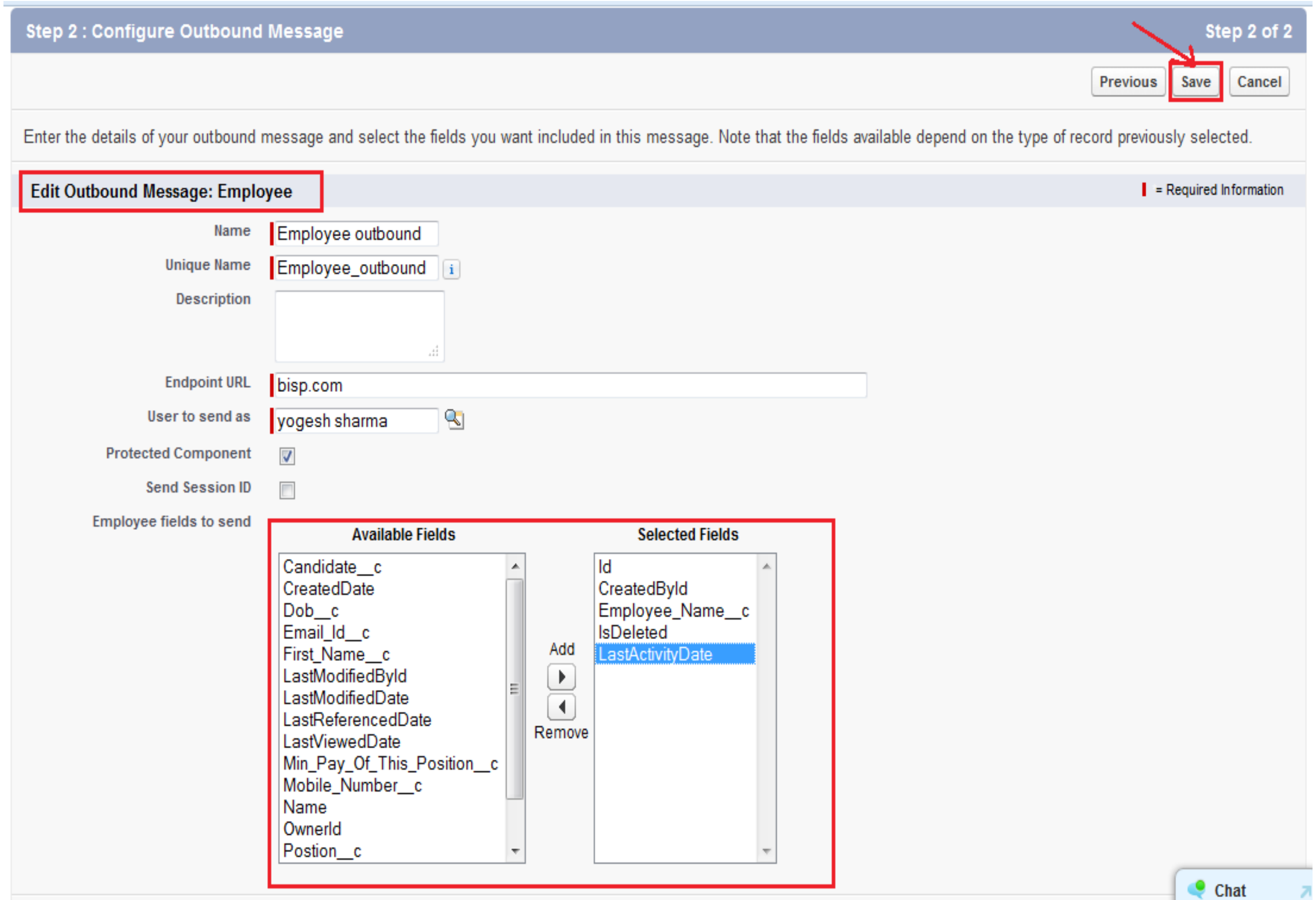
Step > **Creates** > **Workflow & Approval** > **Outbound Messages,** click on New Outbound Message.



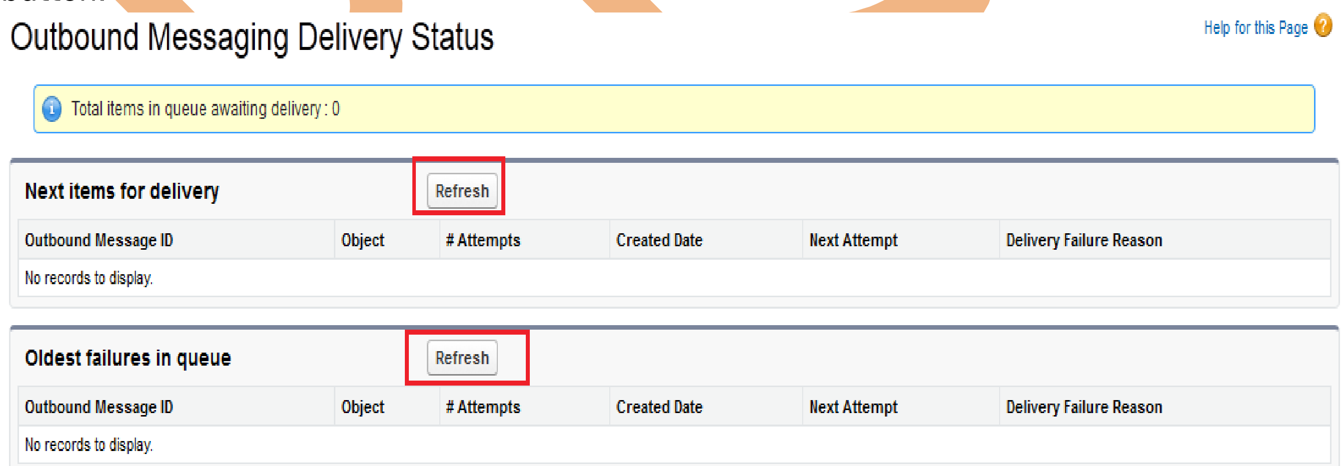
Step 1 : select Object name and click on **Next** button.



Step 2 : Fill all fields and click on **save** button**.**

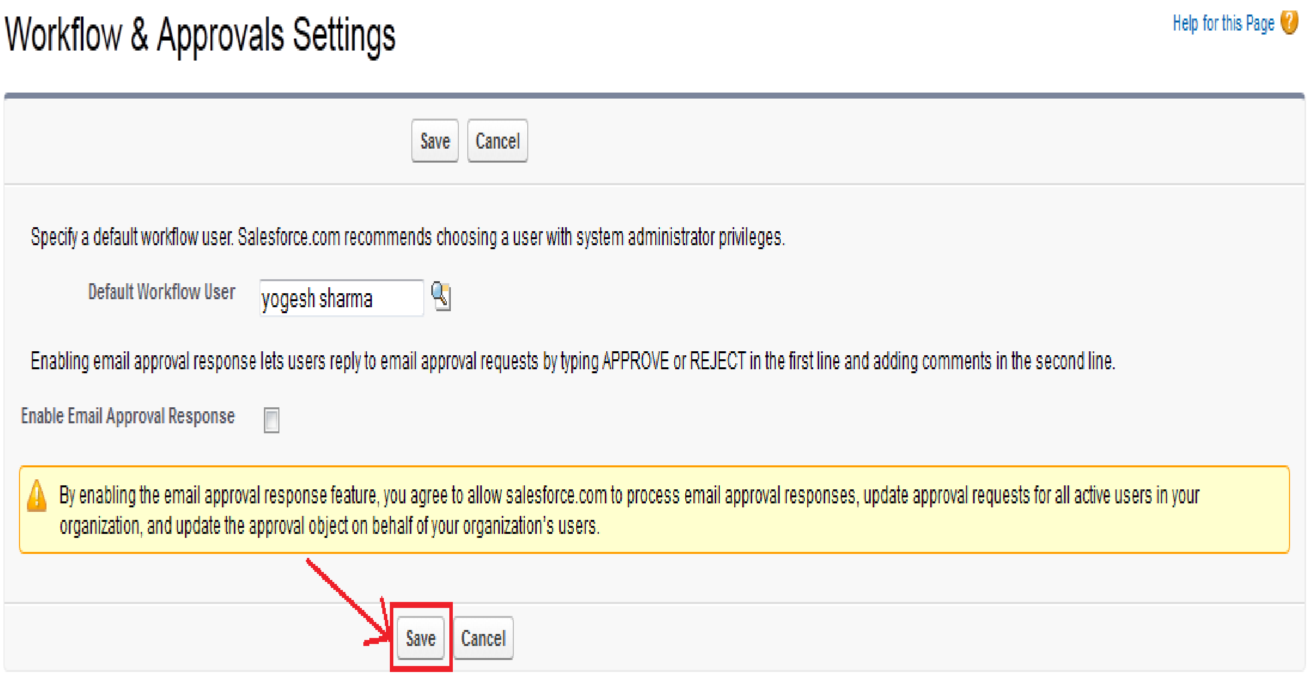


For checking View Message delivery Status click on **View Message delivery Status** button.



Settings

Step > **Creates** > **Workflow & Approval** > **Settings,** Set Default user and click on **Save** button.

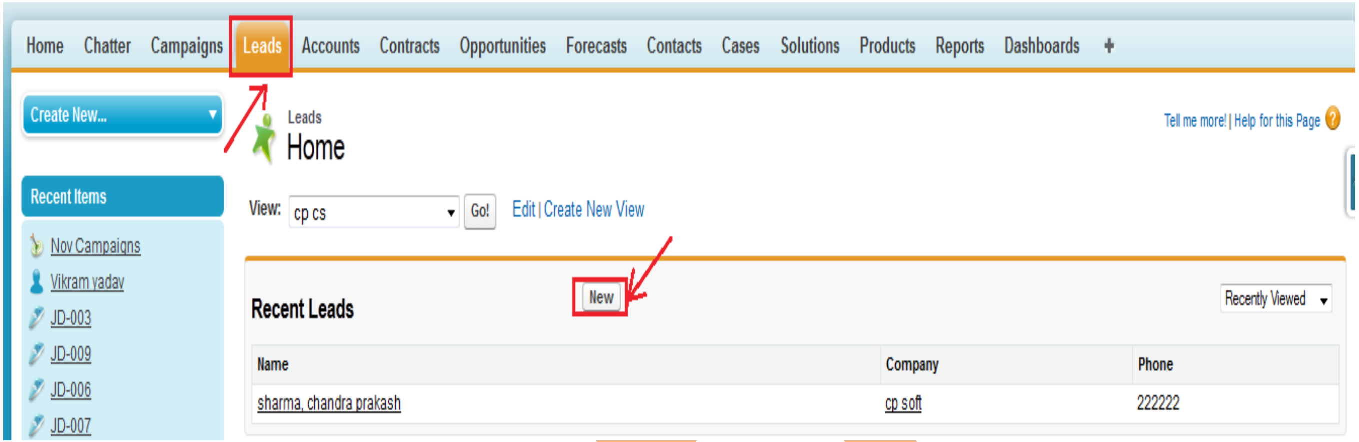


Leads

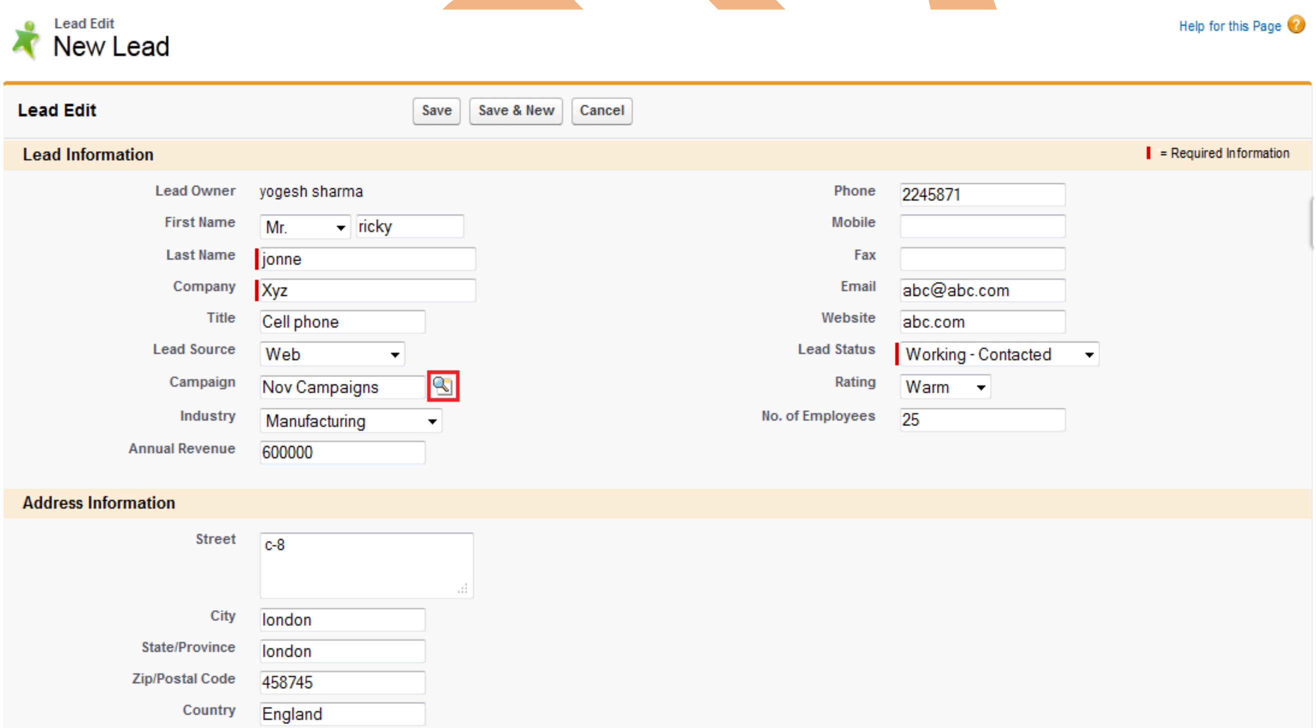
SalesForce is a CRM software company, which allows its users to keep track of correspondence, data and sales for their business contacts in 1 place.
Carefully managing **leads** before they convert into accounts, contacts and opportunities can result in a more streamlined selling process, with sales reps working more productively and efficiently.

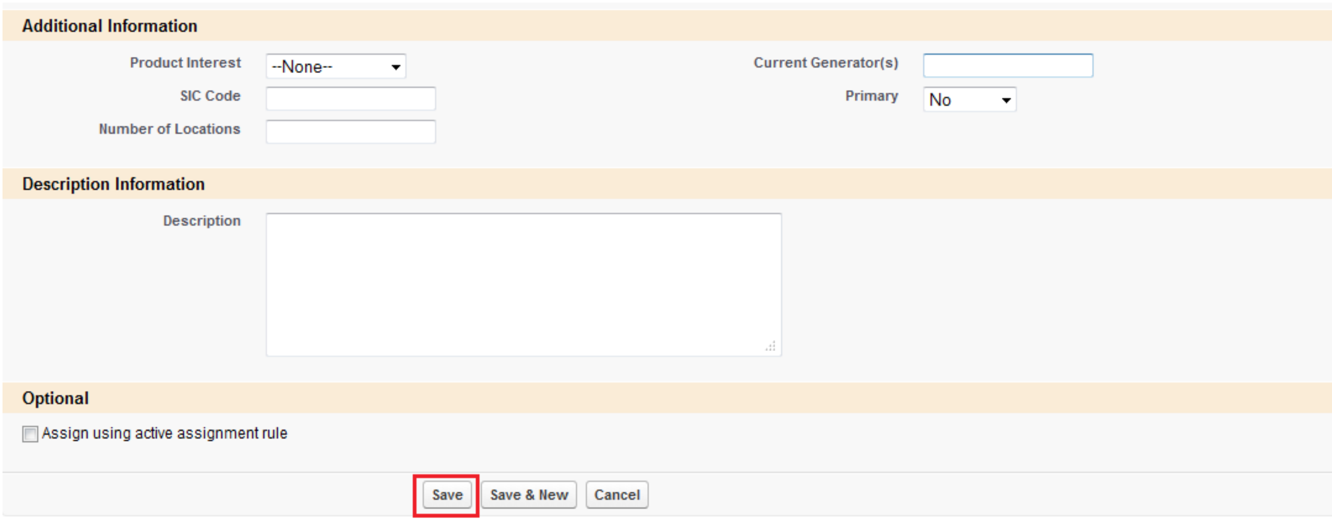
How To create Leads :

After login you can see some tab there is one tab is **Leads** click on this tab after then click on **New** button.


Home Chatter Campaigns Leads Accounts Contracts Opportunities Forecasts Contacts Cases Solutions Products Reports Dashboards +
Create New...
Leads
Home
Tell me more! | Help for this Page
Recent Items
Nov Campaigns
Vikram yadav
JD-003
JD-009
JD-006
JD-007
View: cp cs Go! Edit | Create New View
Recent Leads
New
Recently Viewed
Name
Company
Phone
sharma, chandra prakash
cp soft
222222

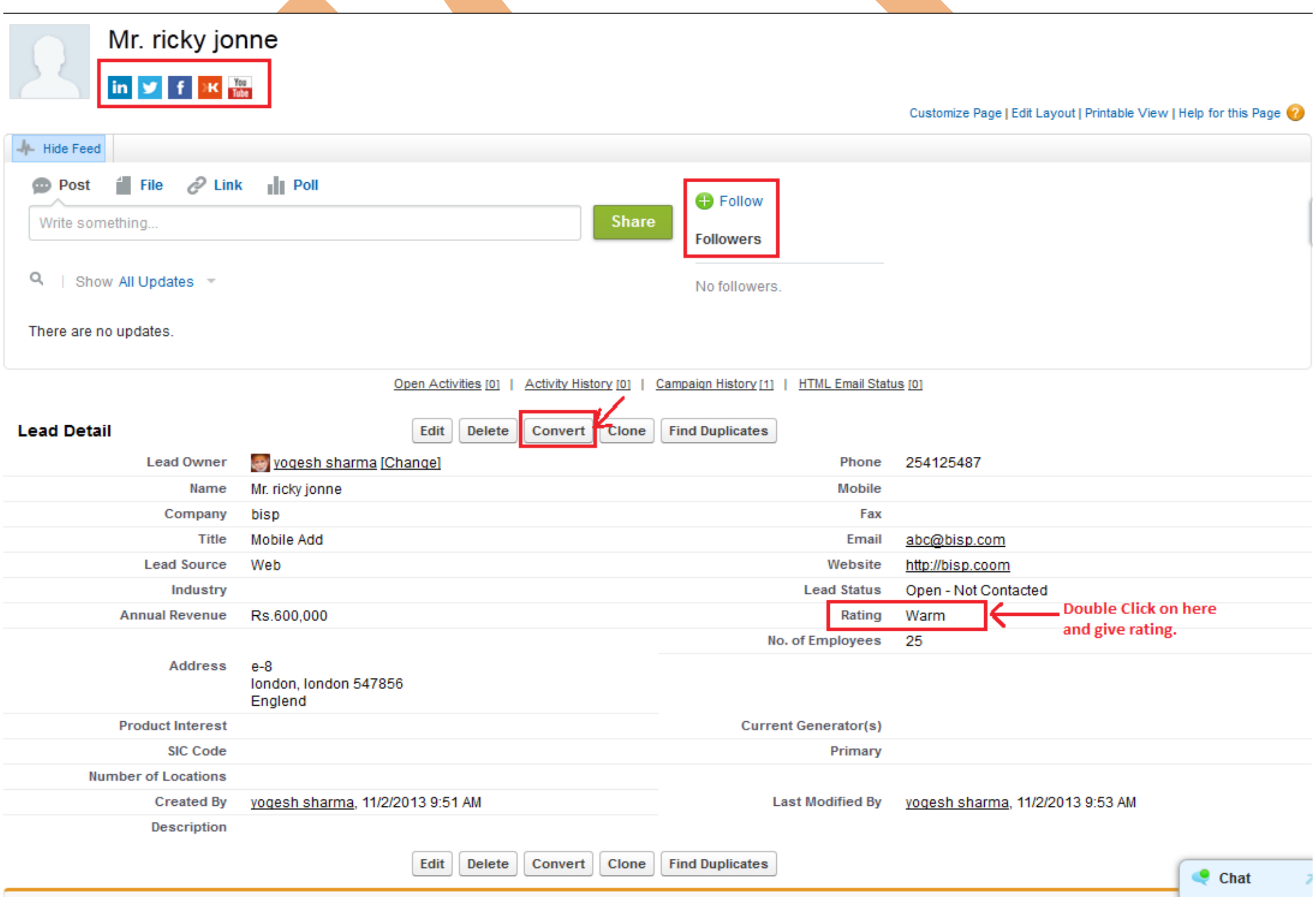
Step 1 :-


Lead Edit
New Lead
Help for this Page
Lead Edit
Save
Save & New
Cancel
Lead Information
= Required Information
Lead Owner yogesh sharma
First Name Mr. ricky
Last Name jonne
Company Xyz
Title Cell phone
Lead Source Web
Campaign Nov Campaigns
Industry Manufacturing
Annual Revenue 600000
Phone 2245871
Mobile
Fax
Email abc@abc.com
Website abc.com
Lead Status Working - Contacted
Rating Warm
No. of Employees 25
Address Information
Street c-8
City london
State/Province london
Zip/Postal Code 458745
Country England



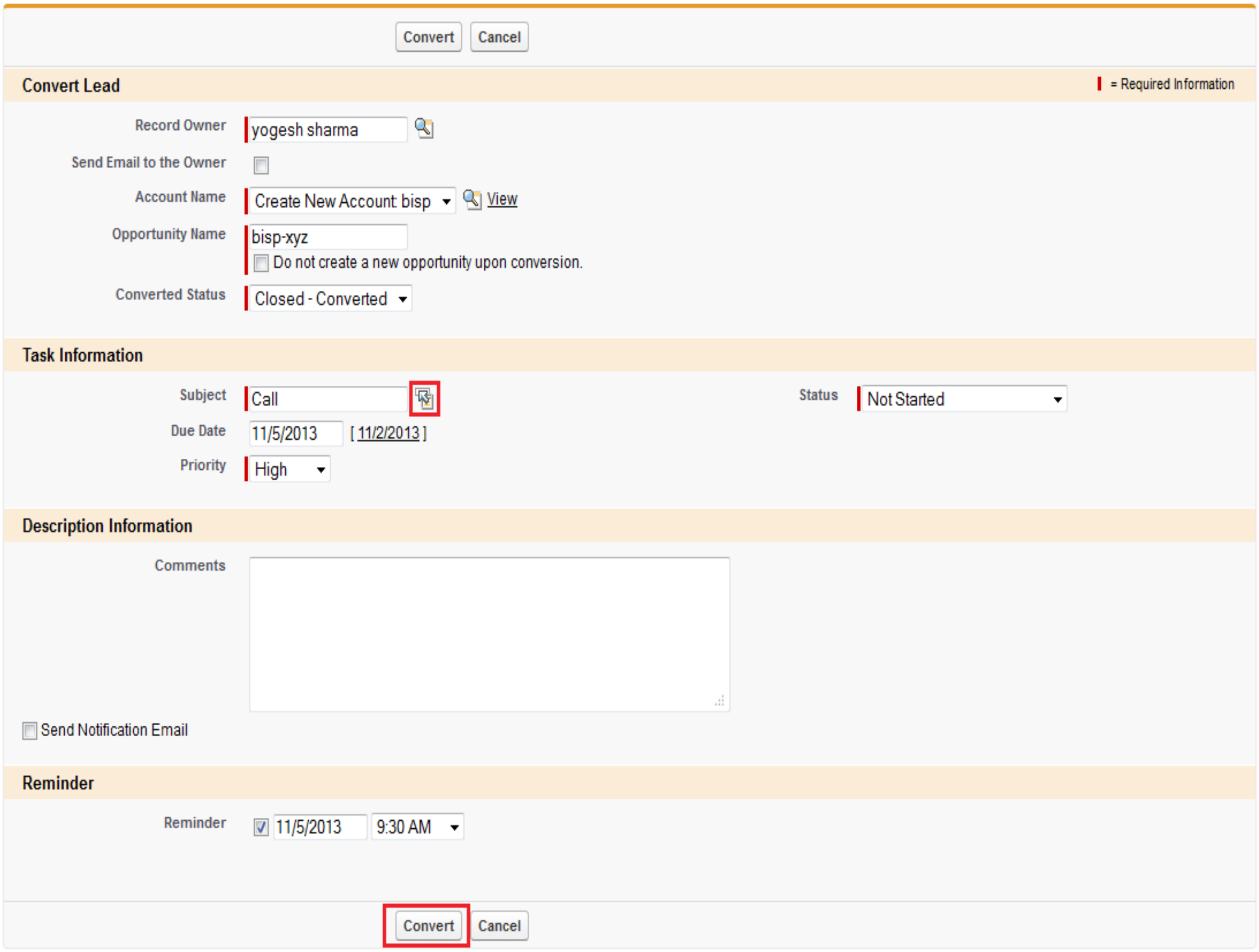
Step 2 :-

After Click Save button you can see new page on this page click on Follow link button. Leads can be converted to accounts. click on **Convert** button.



Step 3 :-

Leads can be converted to accounts, contacts, opportunities, and followup tasks.
You should only convert a lead once you have identified it as qualified.
After this lead has been converted, it can no longer be viewed or edited as a lead, but can be viewed in lead reports.

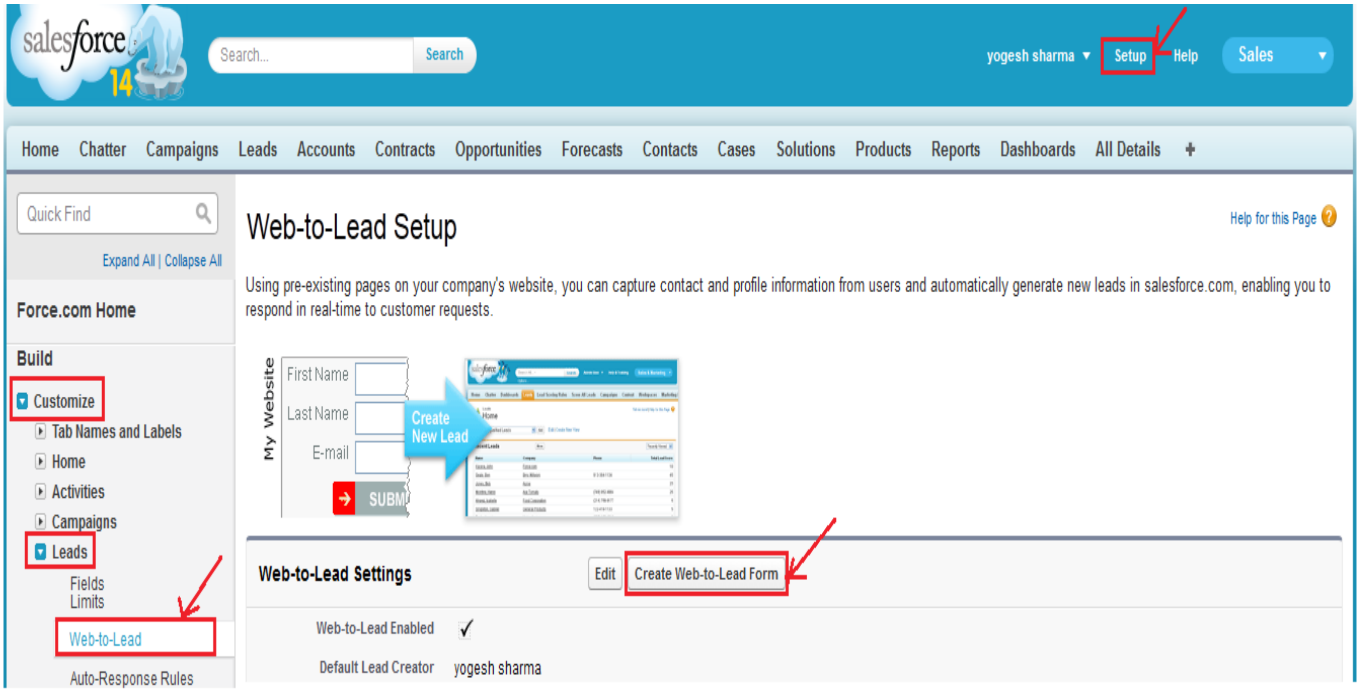


Web-to-Lead Setup

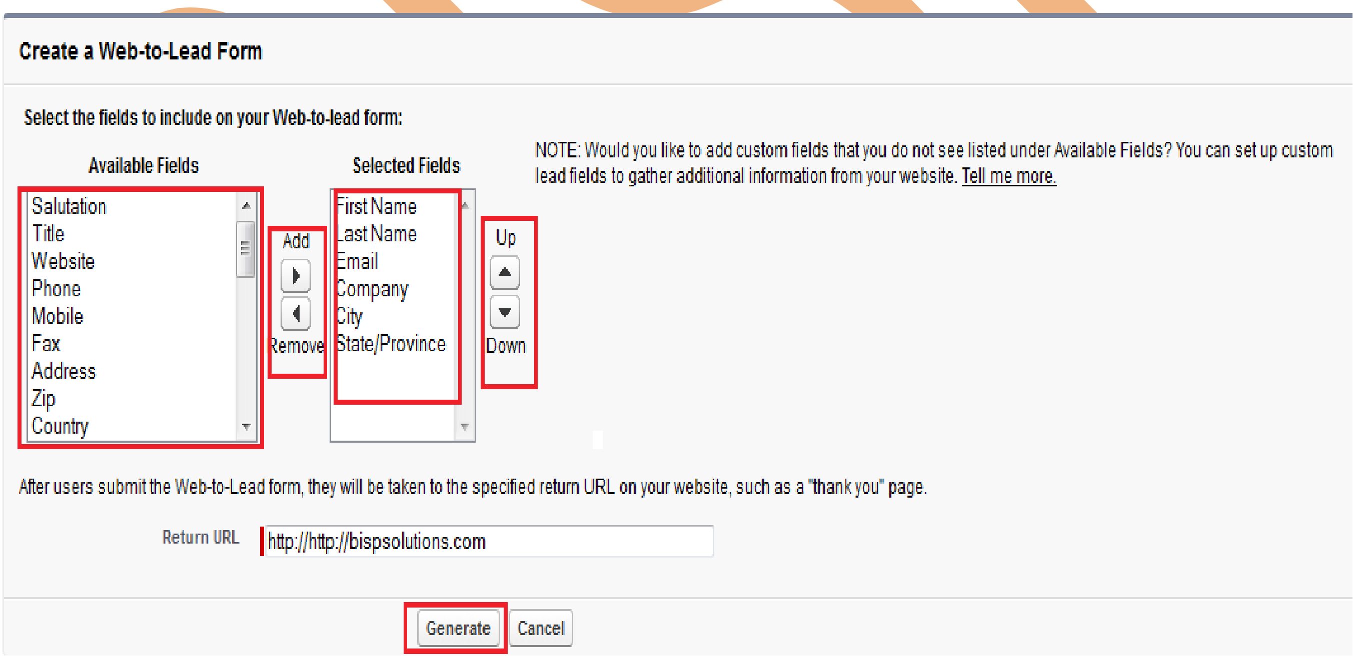
Using pre-existing pages on your company's website, you can capture contact and profile information from users and automatically generate new leads in salesforce.com, enabling you to respond in real-time to customer requests.

How To Go Web-to-Lead Setup :

Click **Setup** -> **Customize** -> **Web-to-Lead**

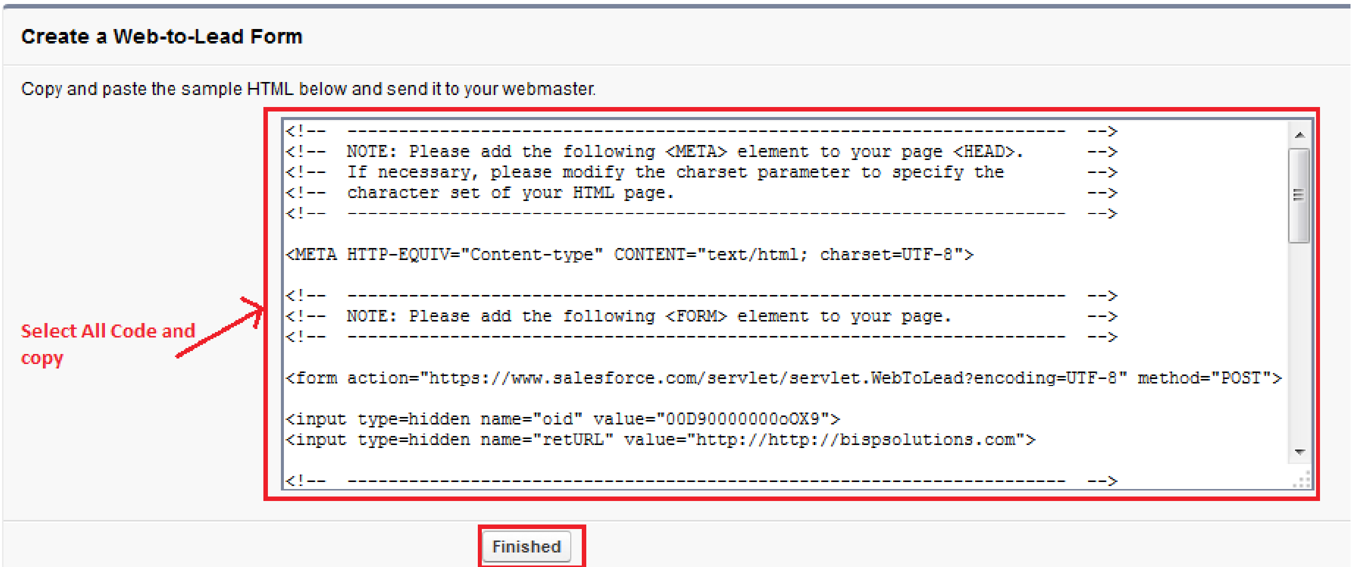


Step 1 :- Select Fields in available list click on add button enter Return URL name then click on **Generate** button.



Step 2 :-

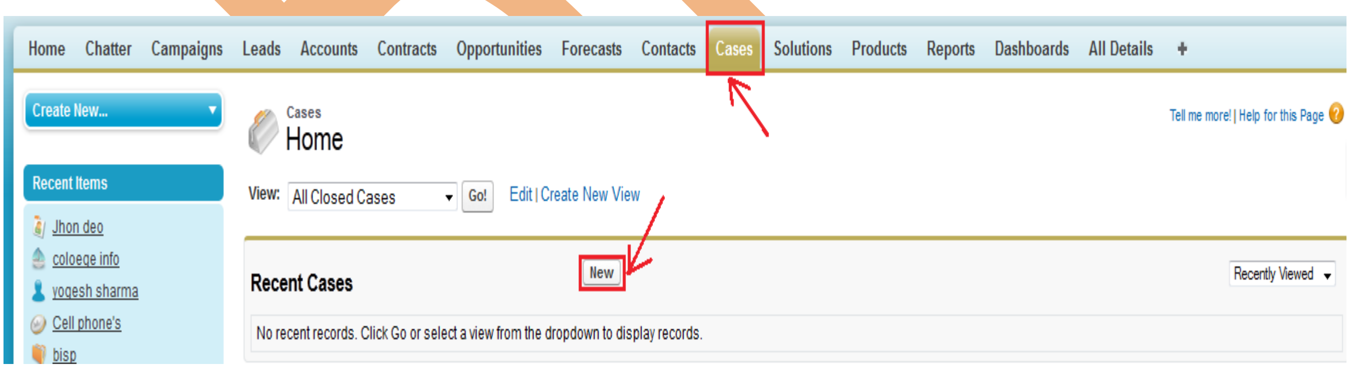
Select all code and copy and paste with in <html> There is paste all code </html> after pasting this code, make this code all you can add any web page for advertisement.



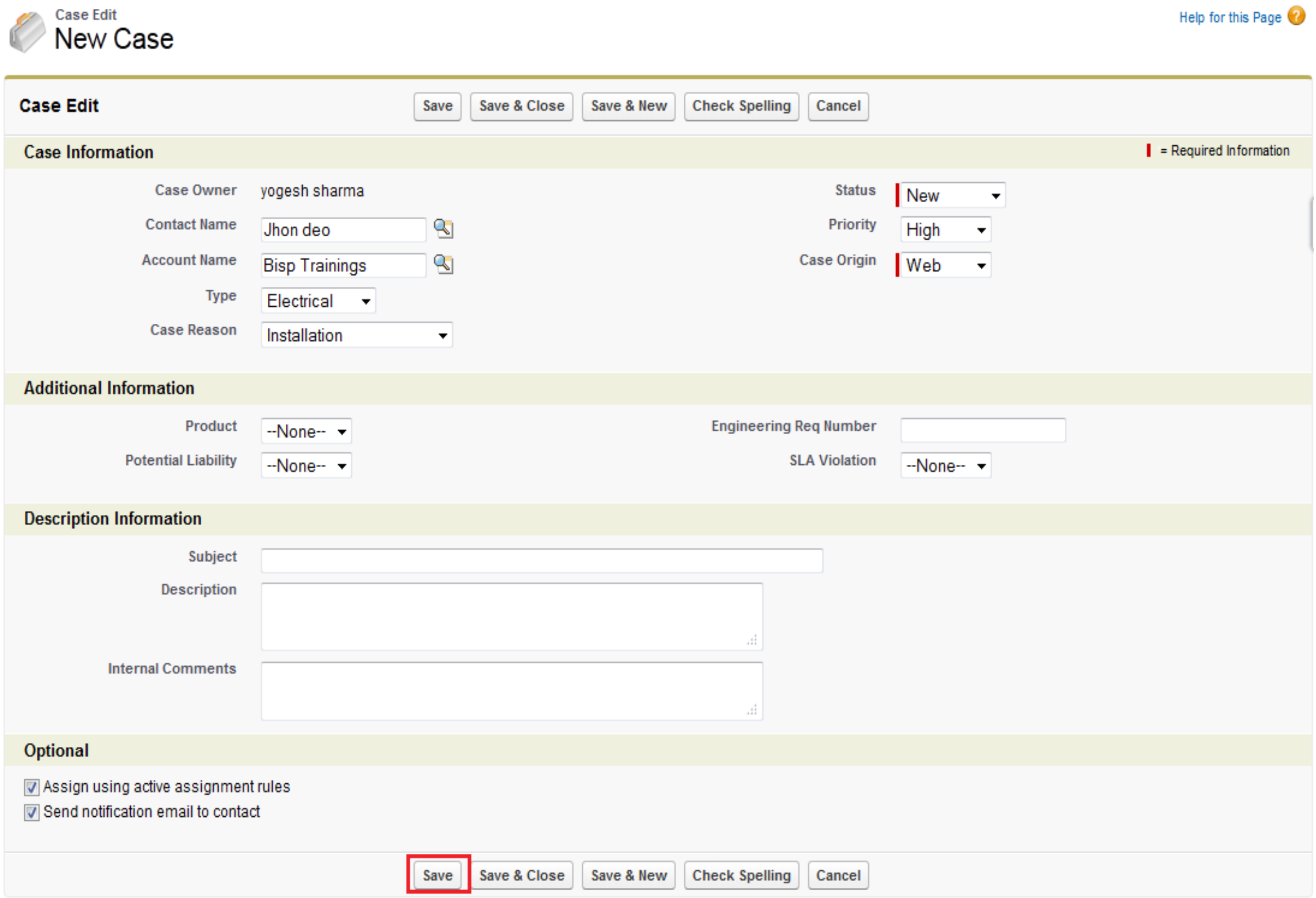
Cases

A case is a description of a customer's problem, feedback, or question. Use cases to track and solve your customers' issues. You can quickly create, edit, locate, and view cases from the Cases tab. To gather customer feedback from your company's website and customer emails.

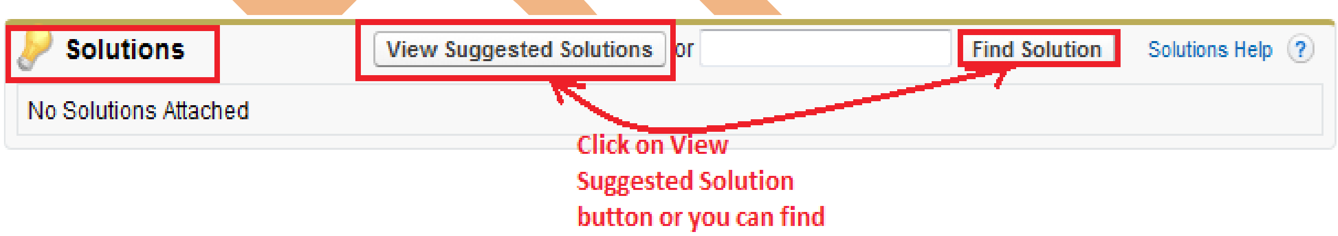
How To Create Case :



Step 1 :

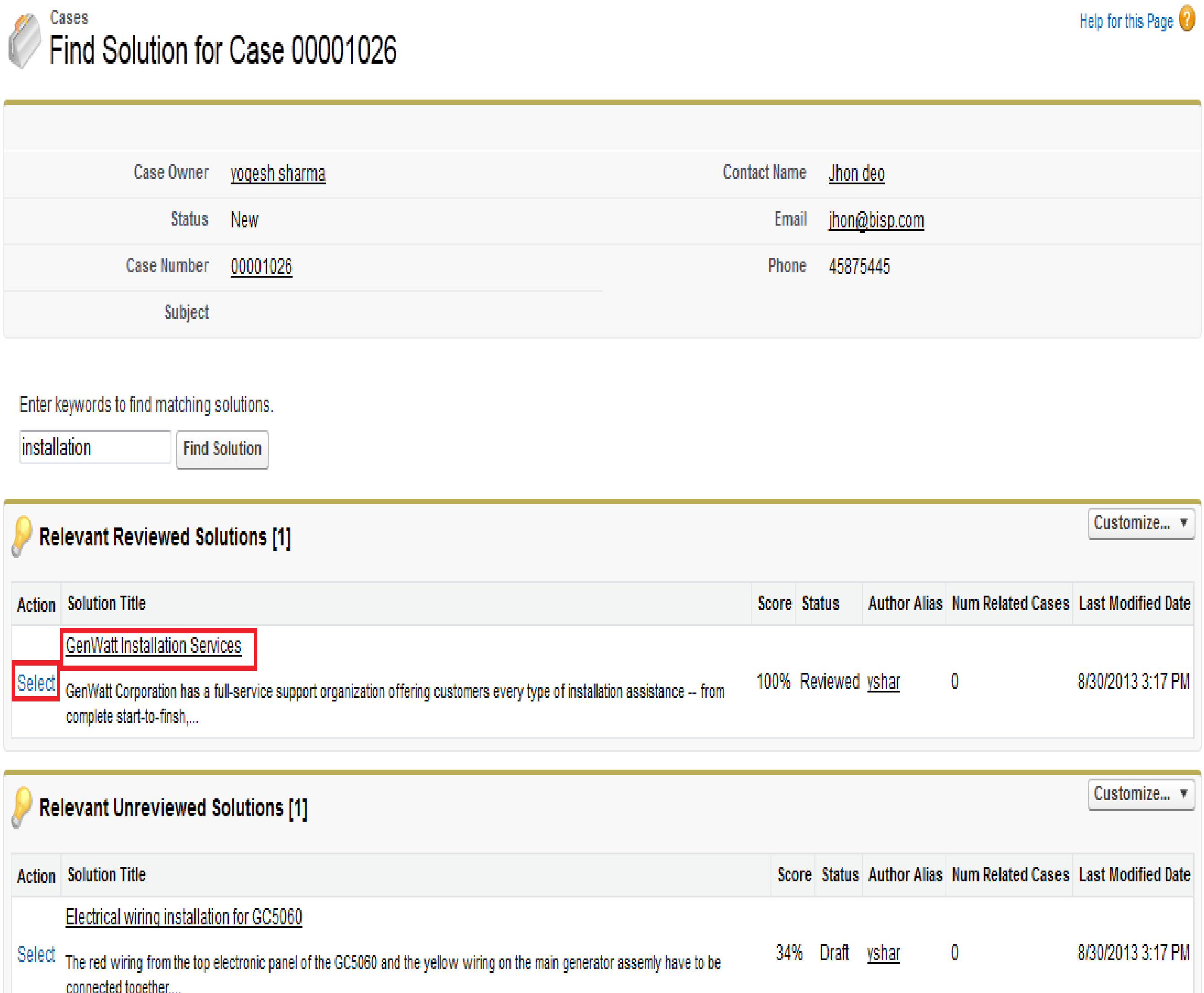


After clicking on save button, you can make new web page as you can see below. This is how you can find solution for cases.



Step 2 :

Click on **Select** link


Cases
Find Solution for Case 00001026
Help for this Page
Case Owner yogesh sharma
Contact Name Jhon deo
Status New
Email jhon@bisp.com
Case Number 00001026
Phone 45875445
Subject
Enter keywords to find matching solutions.
installation
Find Solution
Relevant Reviewed Solutions [1]
Customize...
Action Solution Title Score Status Author Alias Num Related Cases Last Modified Date
GenWatt Installation Services
Select
GenWatt Corporation has a full-service support organization offering customers every type of installation assistance -- from complete start-to-finsh,...
100% Reviewed yshar 0 8/30/2013 3:17 PM
Relevant Unreviewed Solutions [1]
Customize...
Action Solution Title Score Status Author Alias Num Related Cases Last Modified Date
Electrical wiring installation for GC5060
Select
The red wiring from the top electronic panel of the GC5060 and the yellow wiring on the main generator assemly have to be connected together....
34% Draft yshar 0 8/30/2013 3:17 PM