

SESSION - 2

What is EDITION?

Any company implementing Salesforce for the first time or getting migrated to Salesforce CRM should first choose the type of Salesforce edition based on their business need such as type, number of users, features needed, storage etc.,.

Other words, A set of Salesforce features wrapped together in a bundle for access is what we call Editions.

Example - For Sales Cloud, we have four editions as below.

Edition Types		Comments
Essential	Designed for small businesses that want to get started with a CRM system quickly.	
Professional	Designed for businesses requiring full-featured CRM functionality.	
Enterprise	Designed to meet the needs of large and complex businesses. It gives you advanced customization and administration tools, in addition to all the functionality available in Professional Edition.	
Unlimited	Includes all Enterprise Edition functionality, Premier Support, full mobile access, unlimited custom apps, increased storage limits, and other features.	

Screen shot of Sales Cloud Edition (You can refer this in company website

<https://www.salesforce.com/in/products/sales-cloud/pricing/>)

The screenshot shows the Salesforce Sales Cloud Pricing page. At the top, it says "Sales Cloud Pricing" and "Sell faster and smarter with any of our fully customisable CRM editions." Below this, there are four pricing plans arranged horizontally:

- Salesforce Essentials:** Out-of-the-box CRM for up to 10 users. Price: \$25 USD/user/month* (billed annually). Includes a "TRY FOR FREE" button.
- Lightning Professional:** Complete CRM for any size team. Price: \$75 USD/user/month* (billed annually). Includes a "TRY FOR FREE" button.
- Lightning Enterprise:** Deeply customisable sales CRM for your business. Price: \$150 USD/user/month* (billed annually). Includes a "TRY FOR FREE" button.
- Lightning Unlimited:** Unlimited CRM power and support. Price: \$300 USD/user/month* (billed annually). Includes a "TRY FOR FREE" button.

A "MOST POPULAR" badge is positioned above the Lightning Enterprise plan. The background features a large watermark of the word "SalesCloud".

The table below showing few differences between these editions for your reference in Sales Cloud

Features	Essential	Professional	Enterprise	Unlimited
No of Users	Upto 10 Users	No Limit	No Limit	No Limit
Lead Management Features	No	No	Yes	Yes
Chatter	Yes	Yes	Yes	Yes

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Automatic Email Notification	No	No	Yes	Yes
Account and Contact Management	Yes	Yes	Yes	Yes
Price	\$ 25 USD/user/month* (billed annually)	\$ 75 USD/user/month* (billed annually)	\$ 150 USD/user/month* (billed annually)	\$ 300 USD/user/month* (billed annually)

How to login into Salesforce CRM?

There are 2 URLs available to login into Salesforce. They are

URL	Purpose
https://login.salesforce.com/	To login into production environment
https://test.salesforce.com/	To login into test (sandbox) environment

How to get registered with salesforce CRM service?

Using Pay Edition, user can register for 30 days trial by click on option below under pricing link.

The screenshot shows the Salesforce Pricing page. It compares two editions: **Salesforce Essentials** and **Lightning Professional**. Both editions are described as "Out-of-the-box CRM for up to 10 users". The **Salesforce Essentials** edition is priced at \$25 USD/user/month* (billed annually), and the **Lightning Professional** edition is priced at \$75 USD/user/month* (billed annually). Each edition has a "TRY FOR FREE" button at the bottom, which is highlighted with a yellow oval.

Product	Edition	Price	Description
Salesforce	Salesforce Essentials	\$ 25	Out-of-the-box CRM for up to 10 users
Salesforce	Lightning Professional	\$ 75	Complete CRM for any size team

Then how to learn the salesforce platform with the help of edition that could be accessible beyond 30 days?

Using Free Edition called Developer Edition, we can register and explore the platform.

Hence in general, Editions are of pay and free types.

Category	Comments
Pay Edition	Example: Sales Cloud, Service Cloud only available for 30Days Trial
Developer Edition	Free Edition. This will have features closer to higher end edition of pay edition which does not have expiry date

How to register with Developer Edition?

Step1: go to this url

<https://developer.salesforce.com/signup?d=70130000000td6N>

Step 2: Fill the details

Name

Email (this should be an actual email id to get userid and notifications from salesforce)

Company name

Country

User name => this should be in the format of email id.

qualifier@domainname

eg., ranjithbatch105@capitalinfo.com

Step 3: Click on "Sign me Up" Button

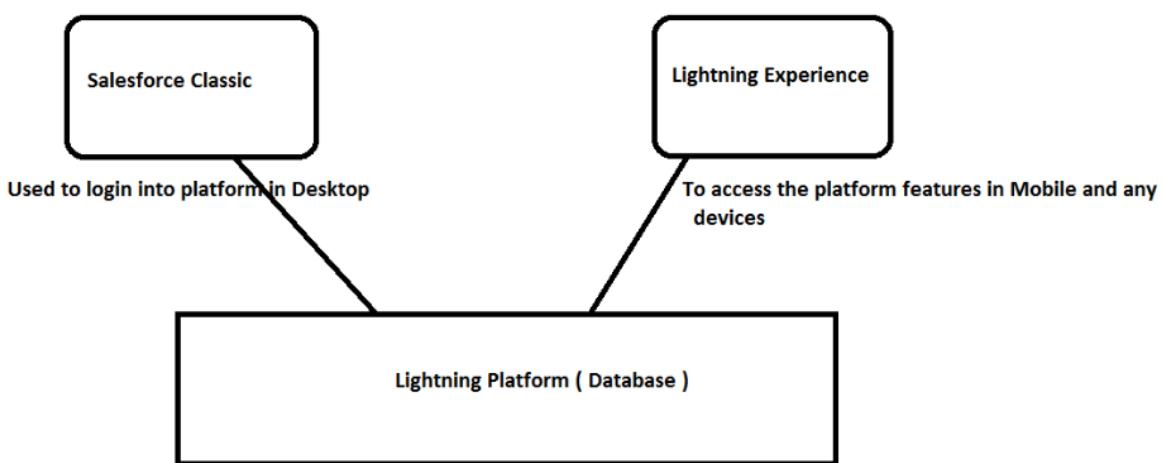
Step 4: Check the inbox of email provided and verify the account from the email received from developer@salesforce.com

Step 5: provide new password and security questions then click change password

How many ways the salesforce platform can be accessible?

Using two interfaces

1. Classic
2. Lightning



Salesforce Classic is an interface used by users since the product launched. It is used to access the salesforce platform in desktops.

Lightning Experience

This is a new redesigned interface in Salesforce that offers numerous benefits and helps sales representatives to work faster by referring information in one page. It's also called as single page application.

This lightning Interface is compatible to access the salesforce application in all types of devices such as mobile, tab and laptops.

NOTE:

Not all the features available in Classic are available in the lightning interface and vice versa. Hence salesforce is providing the options to switch between these two interfaces.

How do you refer Salesforce Platform?

Can be referred in many ways

- Organization
- Org
- Environment
- Developer Edition
- Developer Org

How to logout from Org?

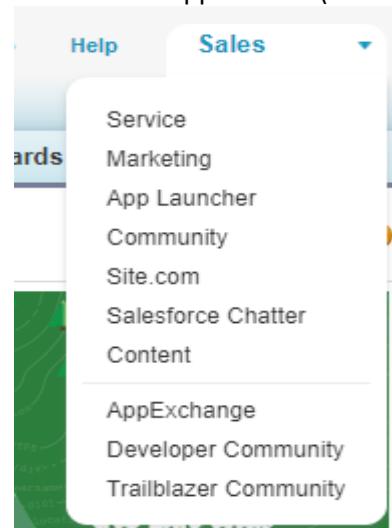
Logout option under your name at the top.

You can login back using - <https://login.salesforce.com/>

Now let us understand the basic features of the platform

When you logged into Salesforce Classic, you will see a drop down at the top right as shown below.

This is called Applications (also referred as "App") .



What is App

- Short name to denote "Application." A collection of components such as tabs, reports, dashboards, and Visualforce pages that address a specific business need.
- Salesforce provides standard apps such as Sales and Call Centre. You can customize the standard apps to match the way you work.
- In addition, you can package an app and upload it to the AppExchange along with related components such as custom fields, custom tabs, and custom objects.

What is Tab?

- ✓ User interface to see Objects information in Salesforce.
- ✓ Help you in making the views which help user to see the information at a glance

The screenshot shows the top navigation bar of a Salesforce instance. It includes the Salesforce logo, a search bar with a 'Search' button, and a link to 'Switch to Lightning Experience'. Below the search bar is a horizontal menu with links: Home, Chatter, Accounts, Contacts, Cases, Solutions, Reports, Dashboards, Trainings, and a plus sign.

APPEXCHANGE

- ✓ AppExchange is a marketplace featuring hundreds of cloud applications created by Salesforce customers, developers, and partners.
- ✓ Many of the applications are **free** and all of them are pre-integrated with Salesforce, enabling you to easily and efficiently add functionality.
- ✓ **There is dedicated URL available to access App Exchange -**
<https://appexchange.salesforce.com/>

The screenshot shows the 'Service' tab selected in the top navigation bar. A sidebar on the left contains a list of sales-related applications: Sales, Marketing, App Launcher, Community, Site.com, Salesforce Chatter, Content, Dummy App, HR Recruiting, AppExchange, Developer Community, and Success Community. The 'AppExchange' section is highlighted with a yellow box. Below the sidebar, there are sections for 'Success Community', 'Developer Community', and 'About Salesforce'.

ABOUT SETUP MENU IN SALESFORCE

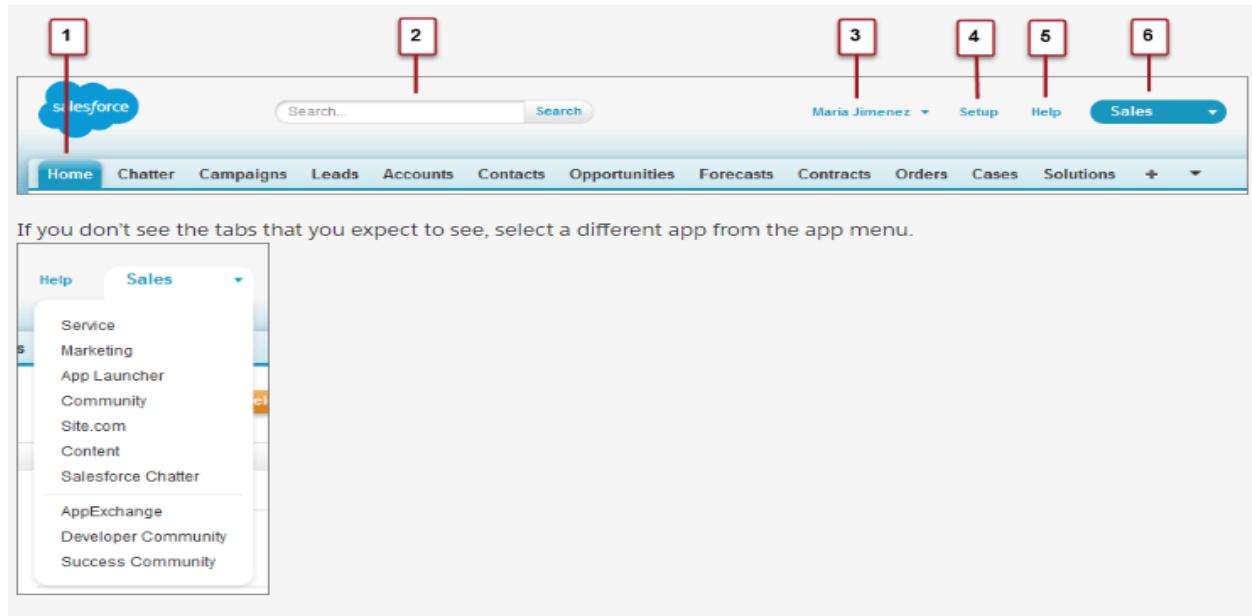
The Salesforce page also called as Setup consist of a tab bar, a navigational sidebar, and a main window as shown below

- It is located at top right side of your Salesforce Org as highlighted above next to your Name menu.
- It provides access to various options/tools to manage the salesforce Org, customize and develop application.

The screenshot shows the top navigation bar of a Salesforce instance. It includes the user profile 'Ranjith Krishnan', a 'Setup' tab highlighted with a yellow box, 'Help', and a 'Sales' tab with a dropdown arrow. Below the navigation bar is a tab bar with links: Solutions, Products, Reports, Dashboards, and a plus sign.

At the top of each Salesforce page are tabs and links for navigating to major features.

1. Use the tabs to switch between objects and features. You can customize this list to suit your needs (more on this in a bit).
2. Search to find any type of record.
3. Access user-specific customizations from the drop-down next to your name.
4. Use the Setup menu to customize Salesforce for your whole org. (You must have administrative privileges.)
5. Access help resources and training.
6. A list of apps, each of which contains different features and tabs.



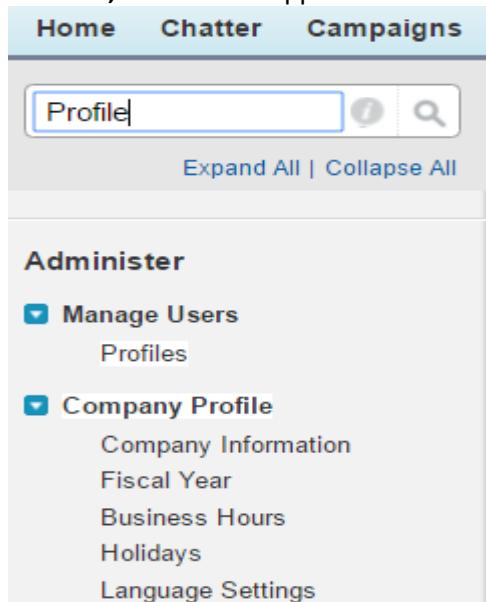
If you're a Salesforce administrator or developer, you use the Setup menu frequently.

SETUP SEARCH

Setup Search is at the top-left corner of Setup, above the left navigation menu. Setup Search uses type-ahead functionality to help you jump quickly to the item you want.

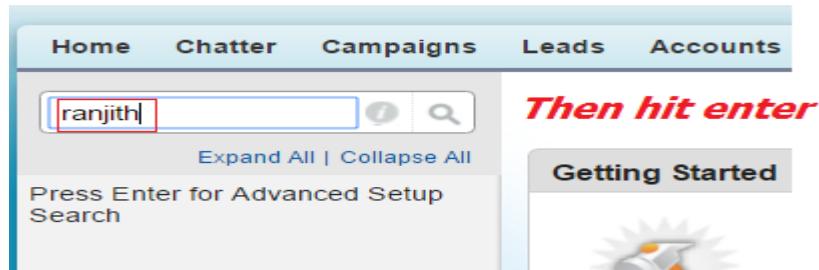
For example, if you're looking for user profiles,

You can either navigate to Administer | Manage Users | Profiles, or start typing profiles in the **Quick Find box**, and Profiles appears



Also, we can do advanced search which will do the search across multiple entities in Salesforce. Example: Let's say you want to find a specific user. Enter part or all of the user's name, and press Enter. If searching for string "Ranjith".

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Setup Search looks for your keywords across users, objects, fields, and more. In the example below, we've located Email Templates, Workflow Rules, Field Updates, and Approval Processes.

All Results i

[« Back to Setup](#) [Help for this Page](#)

Setup Search Results beta

Search: ranjith

Name	Type	Object	Last Modified Date	Last Modified By
Ranjith Krishnan	User		3/28/2017	Ranjith Krishnan

Approval Post Templates (0) Approval Processes (0) Assignment Rules (0) Compact Layouts (0) Custom Buttons or Links (0) Custom Home Pages (0) Duplicate Rules (0) Email Alerts (0) Email Templates (0) Field Updates (0) Fields (0) Groups and Queues (0) Home Page Components (0) Objects (0) Permission Sets (0)

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Click on **Setup Menu** comprised of 6 different sections with various links grouped to achieve specific need.

PURPOSE OF EACH SECTION IN BRIEF:

Section Name	Purpose
Administer	The Administration Setup page lists optional tasks for setting up and customizing your Salesforce organization
Build	Page lists options to customize, develop and manage applications. Example: Visualforce page -> to access list of VF pages stored in force.com database for particular org.
Deploy	Provides links to deploy customizations from one org to another
Monitor	To monitor the time dependent workflow processes, status of outbound messages etc.,
Jobs	To check the status of various scheduled jobs.
Logs	Used to debug the codes and processes.

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Highlights of Salesforce Features

Chatter:

- ✓ To help share information and collaborate with Co-workers, Customers and Partners.
- ✓ A collaboration tool that helps to connect with other users in your Org.

The screenshot shows the Salesforce Chatter interface. At the top, there's a search bar with a 'Search' button. Below the header, a navigation bar includes Home, Accounts, Chatter (which is highlighted in blue), Campaigns, Leads, Contacts, Opportunities, Forecasts, Contracts, and more. On the left, a sidebar for 'sfdcmeet' shows a profile picture of Ranjith Krishnan and a list of 'What I Follow': Messages, Feed, What I Follow (selected), To Me, Bookmarked, Muted, All Company, People, Groups, Files, Topics. The main area displays two posts: one from Ranjith Krishnan about a deal change and another from Sales about a deal being closed.

Global Search

The screenshot shows the Salesforce Global Search interface. At the top, there's a search bar with a 'Search' button and a 'Switch to Lightning Experience' link. Below the header, a navigation bar includes Home, Accounts, Chatter, Campaigns, Leads, Contacts, Opportunities, Forecasts, Contracts, Orders, Cases, Solutions, and more. On the left, a sidebar shows a list of search results: Records (selected), People (0), Reports (0), Positions (0), Accounts (1), Cases (0), Opportunities (2), Trainings (0), Documents (0), Websites (0), Contacts (1). The main area displays three search results tables: Accounts (1 result: Burlington Textiles Corp of America), Opportunities (2 results: Burlington Textiles Weaving Plant Generator), and Contacts (1 result: Mr. Jack Rogers).

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ABOUT USER LICENSES

- A user license determines the baseline of features that the user can access.
- Every user must have exactly one user license.
- You assign user permissions for data access through a profile.

Some of the user licenses provided by Salesforce

Name	Purpose
Salesforce	Designed for users who require full access to standard CRM and Salesforce AppExchange apps. Users with this user license are entitled to access any standard or custom app.
Salesforce Platform	Designed for users who need access to custom apps but not to standard CRM functionality. Users with this license can access core platform functionality such as accounts, contacts, reports, dashboards, documents and custom tabs.
Chatter Free	The Chatter Free license is for users who don't have Salesforce licenses but must have access to Chatter Tab.

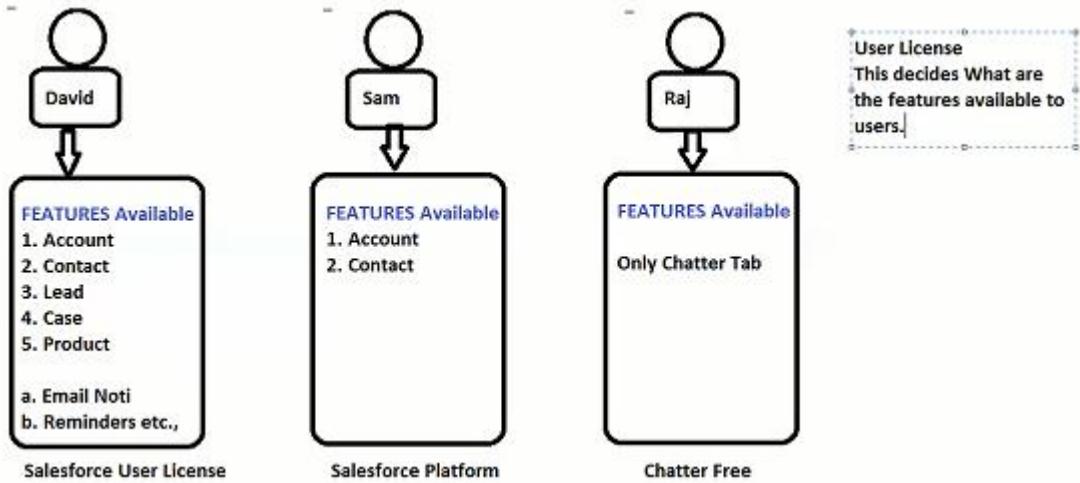
Example

The User below David who is assigned with license – Salesforce can access the standard table such as Account, Contact, Lead, Case etc.,

User Sam who is assigned with Salesforce Platform License can only access the tables such as Account and Contact. He can not have access to other tables like lead, opportunity, case.

The user Raj can only have access to Chatter Tab.

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How to see which license is assigned to you?

Setup

| - Administer

 | -- Manage Users

 | - Users

Then click on your user name and see the field marked as below

User Detail		Edit	Sharing	Change Password	Role	
Name	Ranjith Krishnan				User License	Salesforce
Alias	RKris				Profile	System Administrator
Email	sfdcmeet@gmail.com				Active	<input checked="" type="checkbox"/>
Username	ranjithonbatch701@sfdcmeet.com					

This indicates I could access the complete features of standard CRM such as all the application, objects and features provided by salesforce.

Where to check how many licenses are assigned and remaining in your Org?

Setup

| - Administer

 | -- Company Profile

 | -- Company Information

Go to section “User Licenses” to see how many licenses are available in your org and how many has been assigned and left over?