

# Credenciales de acceso Playground

- Usuario: edwin.estro@creative-badger-bnbp01.com
- Contraseña: Salesforce2

Bedu + Deloitte Salesforce  
Bootcamp  
Sesión 01

# 1. Obtener una organización de Salesforce y crear 3 usuarios.

## Procedimiento:

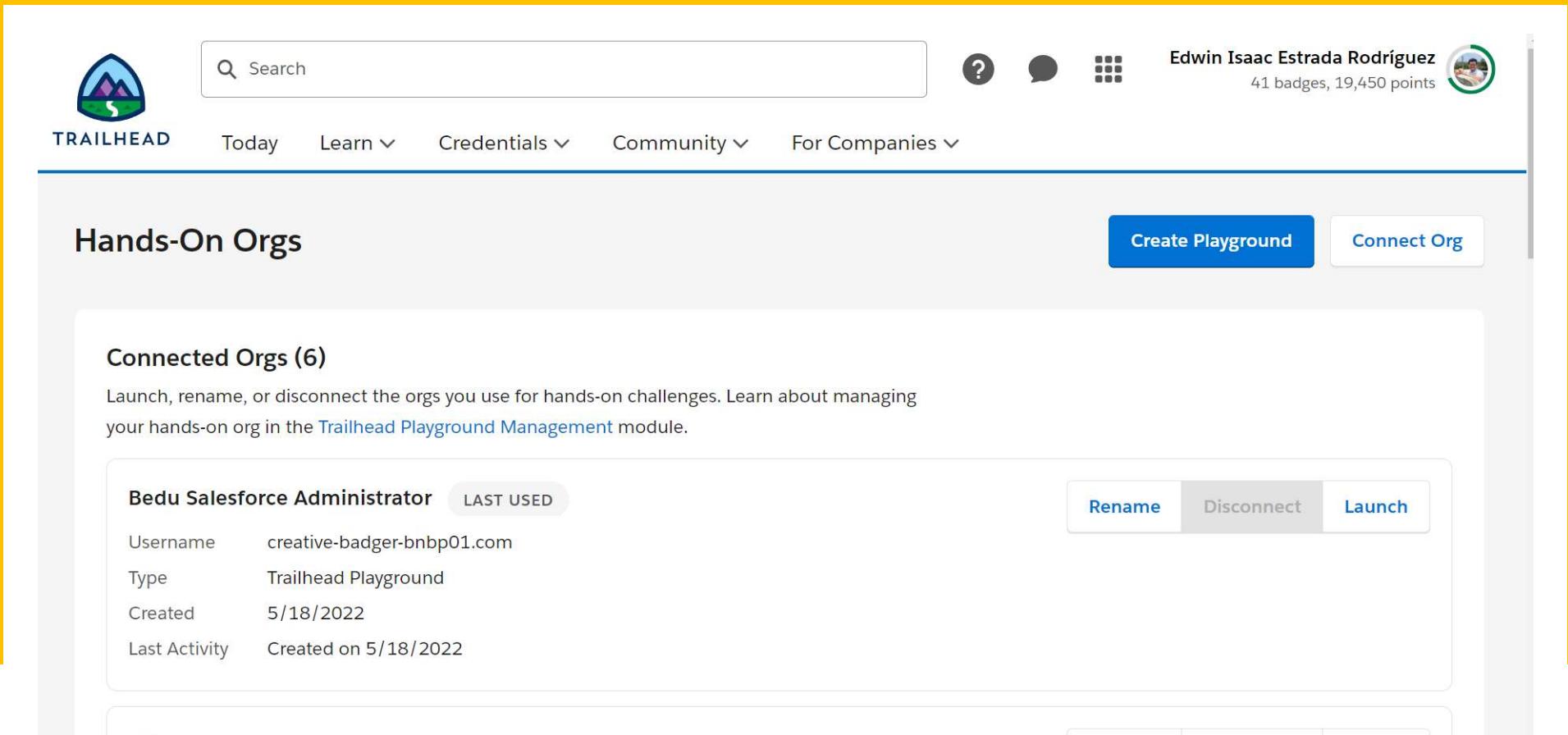
Nos dirigimos hacia las Hands-On Orgs en Trailhead, para acceder a éstas, vamos haciendo click en nuestra foto de perfil en [Trailhead | The fun way to learn \(salesforce.com\)](#). Y en el menu desplegable encontraremos el acceso directo.

Hacemos click en “Create Playground” para crear nuestra organización, a continuación escribimos el nombre. Nuestra organización la llamaremos “Bedu Salesforce Administrator”. Una vez creada, damos click en “Launch”.

Dentro de la organización hacemos click en “Get your Login credentials” para saber cuál es nuestro nombre de usuario y poder obtener la contraseña al dar click en “Reset My Password”.

Para crear los usuarios nos tememos que dirigir al engrane en la esquina superior derecha, dar click y seleccionar “Setup”. Después nos vamos a la barra de búsqueda superior y escribimos “Users”.

Dentro de Users nos aparecerá una lista de usuarios que ignoraremos por ahora y damos click en “Add Multiple users” para crear nuestros 3 usuarios.



The screenshot shows the Trailhead website interface. At the top, there is a search bar with a magnifying glass icon, followed by a question mark icon, a speech bubble icon, and a grid icon. To the right of these is the user profile of Edwin Isaac Estrada Rodríguez, showing 41 badges and 19,450 points, with a small profile picture. Below the header, there is a navigation bar with links: TRAILHEAD, Today, Learn ▾, Credentials ▾, Community ▾, and For Companies ▾. The main content area is titled "Hands-On Orgs". On the right side of this title are two buttons: "Create Playground" (blue) and "Connect Org" (white). Below this, a section titled "Connected Orgs (6)" is shown. It contains a card for "Bedu Salesforce Administrator" (LAST USED). The card displays the following details: Username: creative-badger-bnbp01.com, Type: Trailhead Playground, Created: 5/18/2022, and Last Activity: Created on 5/18/2022. To the right of these details are three buttons: "Rename" (blue), "Disconnect" (gray), and "Launch" (blue). At the bottom of the card, there is a "Edit" link.

TRAILHEAD

Search

?

?

Edwin Isaac Estrada Rodríguez  
41 badges, 19,450 points

Today Learn ▾ Credentials ▾ Community ▾ For Companies ▾

## Hands-On Orgs

Create Playground Connect Org

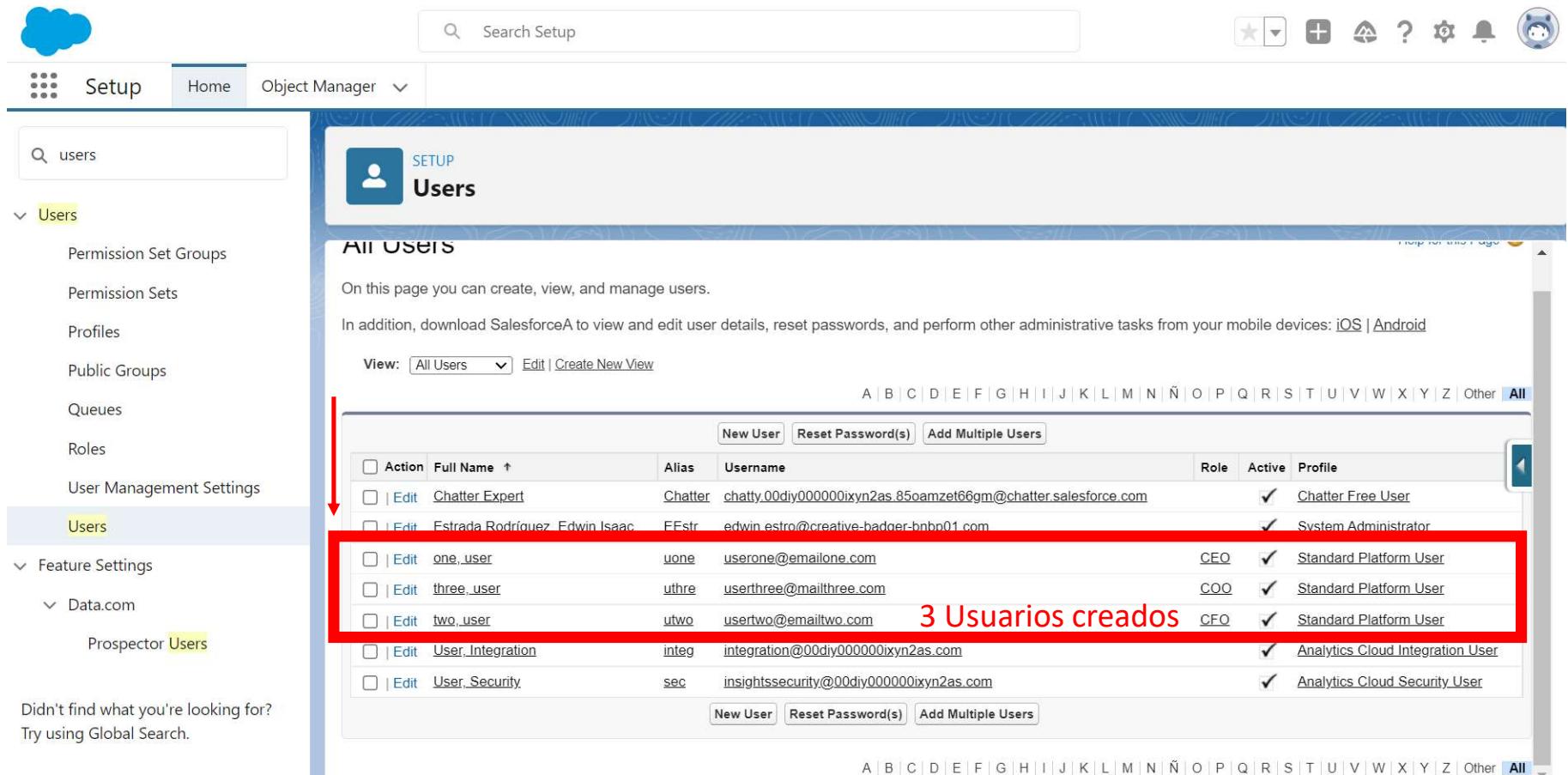
### Connected Orgs (6)

Launch, rename, or disconnect the orgs you use for hands-on challenges. Learn about managing your hands-on org in the [Trailhead Playground Management](#) module.

Bedu Salesforce Administrator		LAST USED
Username	creative-badger-bnbp01.com	
Type	Trailhead Playground	
Created	5/18/2022	
Last Activity	Created on 5/18/2022	

[Edit](#)

[Rename](#) [Disconnect](#) [Launch](#)



Search Setup

Setup Home Object Manager

Q users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for?  
Try using Global Search.

SETUP

Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users [Edit](#) | [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | Ñ | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other [All](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00dijy000000ixyn2as.85oamzet66gm@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<a href="#">Edit</a>	Estrada Rodríguez, Edwin Isaac	EEstr	edwin.estro@creative-badger-bnbn01.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<a href="#">Edit</a>	one_user	uone	userone@emailone.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<a href="#">Edit</a>	three_user	uthre	userthree@mailthree.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<a href="#">Edit</a>	two_user	utwo	usertwo@emailtwo.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<a href="#">Edit</a>	User_Integration	integ	integration@00dijy000000ixyn2as.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<a href="#">Edit</a>	User_Security	sec	insightssecurity@00dijy000000ixyn2as.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User | Reset Password(s) | Add Multiple Users

A | B | C | D | E | F | G | H | I | J | K | L | M | N | Ñ | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other [All](#)

3 Usuarios creados

# Crear 2 perfiles con las indicaciones correspondientes.

## Procedimiento:

Hacemos click en la barra superior dentro de “Setup” y escribimos “Profiles”, Damos click y comenzamos a crear nuestros perfiles. Dentro de “Profiles”, hacemos click en “New User”. En “Existing Profile” seleccionamos la opción “Standard Platform User”, y le ponemos de nombre “Usuario acceso mínimo”. Una vez creado nos aparece el perfil, el cual Podemos editar dando click en “Edit”, y deshabilitamos las casillas de ver, crear, editar o borrar.

Para crear el Segundo usuario, seguimos los mismos pasos pero solo vamos a quitar el acceso de lectura a nivel de campo. Así que en el mismo menu para editar permisos en el perfil, bajamos hacia la sección “Field-Level Security” y desactivamos el acceso a lectura de “Title” y “Level” y también quitamos el acceso de modificación al campo “Mobile”, dentro de “Contacts”



SETUP

## Profiles

Authorization Form Data Uses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	D&B Companies	<input checked="" type="checkbox"/>					
Authorization Form Texts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Data Use Legal Bases	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Background Operations	<input type="checkbox"/>						Data Use Purposes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Brands	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscriptions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Engagement Channel Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Channel Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ideas	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Communication Subscription Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Individuals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Locations	<input type="checkbox"/>					
Contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Party Consents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Push Topics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

SETUP

Individual	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Languages	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Modified By	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Stay-in-Touch Request Date	Date/Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Stay-in-Touch Save Date	Date/Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lead Source	Picklist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Level	Picklist	<input type="checkbox"/>	<input type="checkbox"/>
Mailing Address	Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mobile	Phone	<input type="checkbox"/>	<input type="checkbox"/>
Name	Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Other Address	Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Other Phone	Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Phone	Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Reports To	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Title	Text	<input type="checkbox"/>	<input type="checkbox"/>

**Save** **Cancel**

# Crea un conjunto de permisos llamado “Usuario acceso administrativo”

En “Setup Quick Search bar” escribimos “permission sets” y lo seleccionamos cuando salga. En esta página seleccionamos “New” para crear un nuevo conjunto de permisos. Agregamos el nombre del conjunto de permisos “Usuario acceso administrativo” y ya creado buscamos en la lista el apartado que dice “Object Settings” y dentro de éste hacemos click en “Contacts” para luego editar y activar el acceso a modificar y ver “Level” “Title”, y “Mobile”.

SETUP

## Permission Sets

	Read	Write
Fax	<input type="checkbox"/>	<input type="checkbox"/>
Fax Opt Out	<input type="checkbox"/>	<input type="checkbox"/>
Home Phone	<input type="checkbox"/>	<input type="checkbox"/>
Individual	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Languages	<input type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Stay-in-Touch Request Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Stay-in-Touch Save Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lead Source	<input type="checkbox"/>	<input type="checkbox"/>
Level	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mailing Address	<input type="checkbox"/>	<input type="checkbox"/>
Mobile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Other Address	<input type="checkbox"/>	<input type="checkbox"/>
Other Phone	<input type="checkbox"/>	<input type="checkbox"/>
Phone	<input type="checkbox"/>	<input type="checkbox"/>
Reports To	<input type="checkbox"/>	<input type="checkbox"/>
Title	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## Actualizar el perfil asignado a los usuarios creados previamente

- “Usuario 1” -> Perfil “Usuario acceso mínimo”
- “Usuario 2” -> Perfil “Usuario acceso estándar”
- “Usuario 3” -> Perfil “Usuario acceso estándar”

Nos dirigimos hacia “Users” y cambiamos cada perfil de usuario individualmente.



SETUP

## Users

User Edit

user one

Help for this Page

## User Edit

Save

Save &amp; New

Cancel

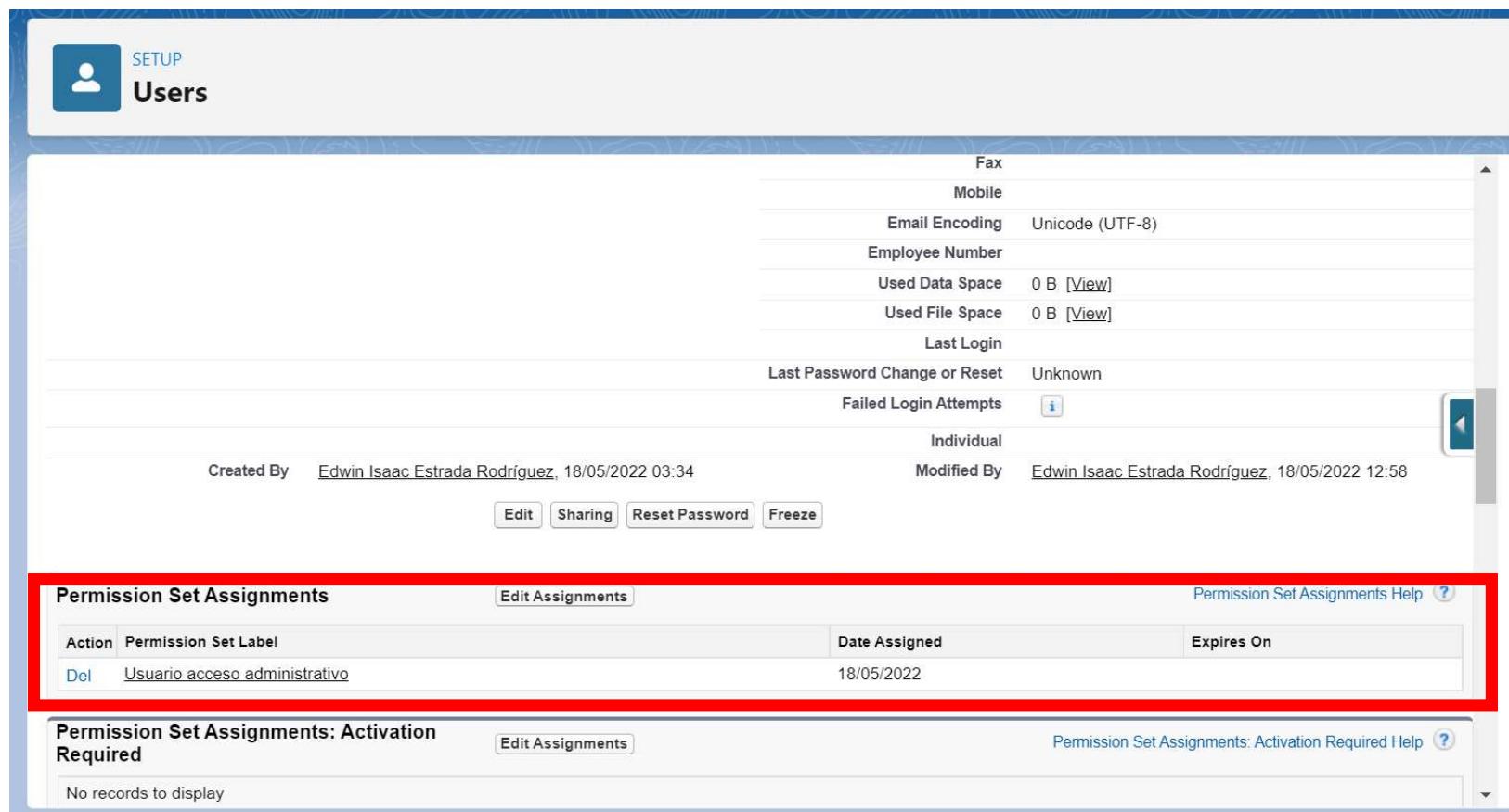
## General Information

= Required Information

First Name	<input type="text" value="user"/>
Last Name	<input type="text" value="one"/>
Alias	<input type="text" value="uone"/>
Email	<input type="text" value="userone@emailone.com"/>
Username	<input type="text" value="userone@emailone.com"/>
Nickname	<input type="text" value="User165286285282550605"/>
Title	<input type="text"/>
Company	<input type="text"/>
Department	<input type="text"/>
Division	<input type="text"/>

Role	<input type="text" value="CEO"/>
User License	<input type="text" value="Salesforce Platform"/>
Profile	<input type="text" value="Standard Platform User"/>
Active	<input type="text" value="Standard Platform User"/> <input type="text" value="Usuario acceso estándar"/> <input type="text" value="Usuario acceso mínimo"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>

# Asigna el conjunto de permisos “Usuario acceso administrativo” al “Usuario 3”



The screenshot shows a software interface for managing users. At the top, there is a header with a user icon, the word "SETUP", and the word "Users". Below the header, there is a table with user details:

Fax	
Mobile	
Email Encoding	Unicode (UTF-8)
Employee Number	
Used Data Space	0 B <a href="#">[View]</a>
Used File Space	0 B <a href="#">[View]</a>
Last Login	
Last Password Change or Reset	Unknown
Failed Login Attempts	<a href="#">1</a>
Individual	

Below the table, there are "Created By" and "Modified By" fields, both showing "Edwin Isaac Estrada Rodríguez, 18/05/2022 03:34" and "Edwin Isaac Estrada Rodríguez, 18/05/2022 12:58" respectively. At the bottom of this section are four buttons: "Edit", "Sharing", "Reset Password", and "Freeze".

Below this section is a table titled "Permission Set Assignments" with a red border. The table has columns for "Action", "Permission Set Label", "Date Assigned", and "Expires On". It contains one row with the following data:

Action	Permission Set Label	Date Assigned	Expires On
<a href="#">Del</a>	<a href="#">Usuario acceso administrativo</a>	18/05/2022	

At the bottom of the "Permission Set Assignments" section is a link "Permission Set Assignments Help" with a question mark icon. Below this section is another table titled "Permission Set Assignments: Activation Required" with a red border. It has a single row with the text "No records to display". At the bottom of this section is a link "Permission Set Assignments: Activation Required Help" with a question mark icon.

# Observaciones al iniciar sesión como los usuarios

Usuario 1: Al buscar el objeto “Contacts” éste no se muestra debido a la configuración de perfil de usuario mínimo.

Usuario 2: Se puede acceder a los contactos y a sus registros, y debido a la configuración de usuario estándar, no se muestran ni el cargo ni el móvil, así tampoco su nivel.

Usuario 3: Este usuario tiene perfil estándar pero puede modificar los campos mencionados anteriormente debido a que tiene asignado un conjunto de permisos administrativos.

# Sesión 02

## **Gestión de Usuarios.**

# Validar que es posible crear 4 usuarios con licencia “Salesforce Platform”.

Lanzamos nuevamente nuestra organización e ingresamos con el “administrador del sistema”.

Nos dirigimos a “Users”, picamos en “New” para crear un usuario con Licencia “Salesforce” y perfil “administrador del sistema”.

Hacemos click en cada uno de los usuarios creados en la sesión anterior y los desactivamos dando click en la casilla “active”.

# Desactivar usuario.

User Edit  
user one

Help for this Page 

User Edit Save Save & New Cancel

General Information = Required Information

First Name	<input type="text" value="user"/>	Role	<input type="text" value="CEO"/>
Last Name	<input type="text" value="one"/>	User License	<input type="text" value="Salesforce Platform"/>
Alias	<input type="text" value="uone"/>	Profile	<input type="text" value="Usuario acceso mínimo"/> 
Email	<input type="text" value="userone@emailone.com"/>	Active	<input checked="" type="checkbox"/>
Username	<input type="text" value="userone@emailone.com"/>	Marketing User	<input type="checkbox"/>
Nickname	<input type="text" value="User165286285282550605"/> 	Offline User	<input type="checkbox"/>
Title	<input type="text"/>	Knowledge User	<input type="checkbox"/>

Validar si se pueden crear 4 usuarios con licencia “Salesforce Platform”

Si se desactivan los usuarios anteriores se pueden crear nuevamente 3 usuarios máximo con perfil “Salesforce Platform”.  
El desactivar los usuarios al parecer hace que vuelvan a estar disponibles las licencias.

New User Help f

User Edit Save Save & New Cancel

**General Information** ■ = Required

First Name	<input type="text"/>	Role	<input type="text" value="&lt;None Specified&gt;"/>	<span style="color: red;">■</span>
Last Name	<input type="text" value="user6"/>	User License	<input type="text" value="Salesforce Platform"/>	<span style="color: red;">■</span>
Alias	<input type="text" value="user"/>	Profile	<input type="text" value="--None--"/>	<span style="color: red;">■</span>
Email	<input type="text" value="usersix@sixthemail.com"/>	Active	<input checked="" type="checkbox"/>	
Username	<input type="text" value="usersix@sixthemail.com"/>	Marketing User	<input type="checkbox"/>	
Nickname	<input type="text" value="User165305697986251330"/> <span style="color: red;">■</span>	Offline User	<input type="checkbox"/>	

## Observaciones.

- Se pueden crear tantos usuarios con licencia “Salesforce” como sean necesarios, pero para crearlos podemos tener máximo 2 usuarios activados con licencia “Salesforce” para poder crear uno más.

User Edit

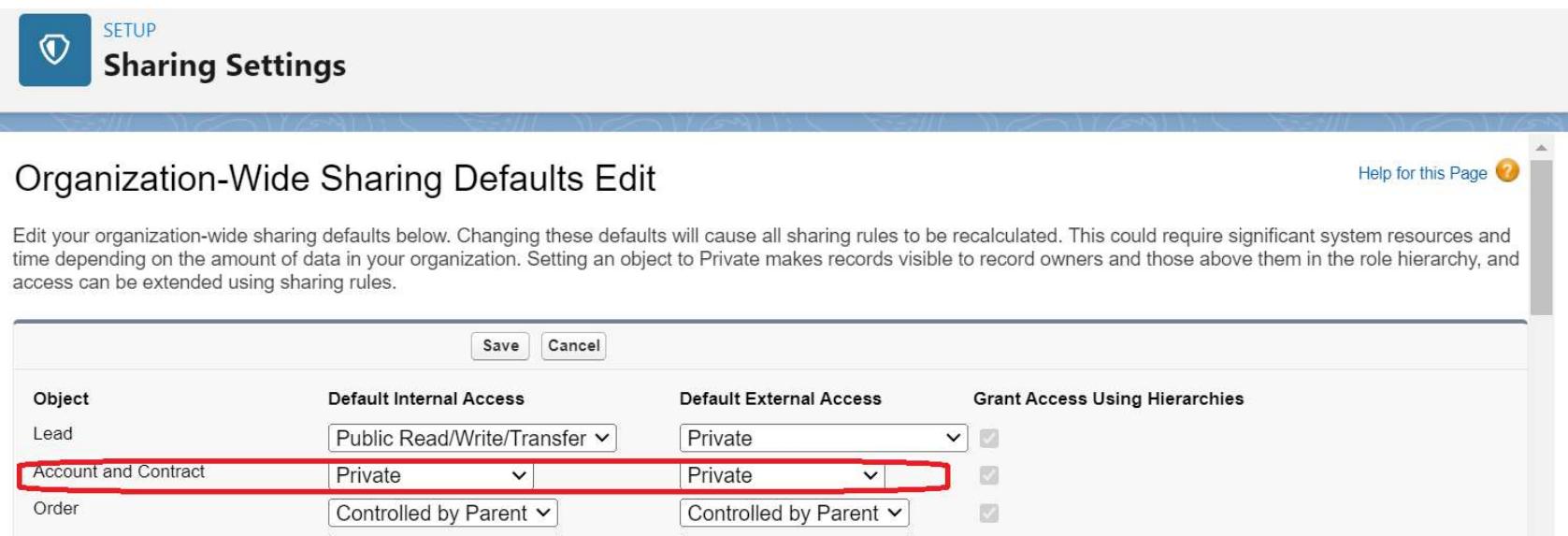
Save Save & New Cancel

General Information

First Name	<input type="text"/>	Role	<input type="text" value="&lt;None Specified&gt;"/>
Last Name	<input type="text" value="user5 user5"/>	User License	<input type="text" value="Salesforce Platform"/>
Alias	<input type="text" value="user5"/>	Profile	<input type="text" value="Usuario acceso estándar"/>
Email	<input type="text" value="user5@mail.com"/>	Active	<input checked="" type="checkbox"/>
Username	<input type="text" value="user5@mail.com"/>	Marketing User	<input type="checkbox"/>
Nickname	<input type="text" value="User165297966032766364"/>	Offline User	<input type="checkbox"/>

## Configuración de la Colaboración predeterminada(Organization Wide Defaults - OWS) y creación de una Jerarquía de Funciones

- Ve a la configuración de colaboración predeterminada y define como “Privado” el comportamiento del objeto “Cuentas”.



The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The title is 'Organization-Wide Sharing Defaults Edit'. The page displays a table of objects and their sharing settings. The 'Object' column lists 'Lead', 'Account and Contract', and 'Order'. The 'Default Internal Access' column shows dropdown menus for 'Lead' (Public Read/Write/Transfer), 'Account and Contract' (Private), and 'Order' (Controlled by Parent). The 'Default External Access' column shows dropdown menus for 'Lead' (Private), 'Account and Contract' (Private), and 'Order' (Controlled by Parent). The 'Grant Access Using Hierarchies' column contains three checkboxes, all of which are checked for Lead, Account and Contract, and Order. The 'Account and Contract' row is highlighted with a red box, and the 'Default Internal Access' and 'Default External Access' columns for this row are also highlighted with a red box.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Private	Private	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>

- Crea una jerarquía de funciones que represente la siguiente estructura:  
Gerente

```
    Supervisor
        Asesor
```

## Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role,

### Your Organization's Role Hierarchy

---

[Collapse All](#) [Expand All](#)



# Crear 3 registros por usuario en “Cuentas”.

1	<input type="checkbox"/> <a href="#">Comfortablest INC - User02</a>	utwo
2	<input type="checkbox"/> <a href="#">Comfortabler INC - User02</a>	utwo
3	<input type="checkbox"/> <a href="#">Comfortable INC - User02</a>	utwo
4	<input type="checkbox"/> <a href="#">Sexiest INC - User03</a>	uthre
5	<input type="checkbox"/> <a href="#">Sexier INC - User03</a>	uthre
6	<input type="checkbox"/> <a href="#">Sexy INC - User03</a>	uthre
7	<input type="checkbox"/> <a href="#">Luxuriest INC - User01</a>	uone
8	<input type="checkbox"/> <a href="#">Luxurier INC - User01</a>	uone
9	<input type="checkbox"/> <a href="#">Luxury INC - User01</a>	uone

User01 Asesor

Solo puede ver sus propias cuentas

User02 Supervisor

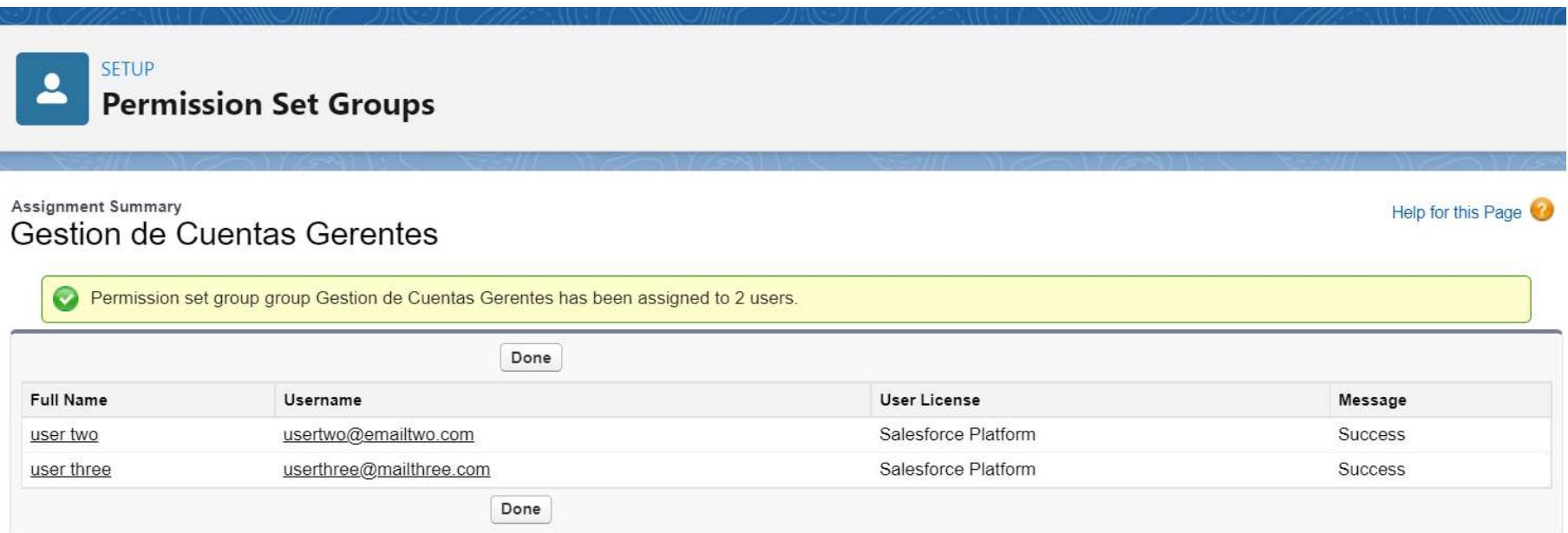
Solo puede ver sus propias cuentas

User03 Gerente

Se pueden ver todas las cuentas creadas

Crea un grupo llamado “Gestion de Cuentas gerentes” que considere a los usuarios:

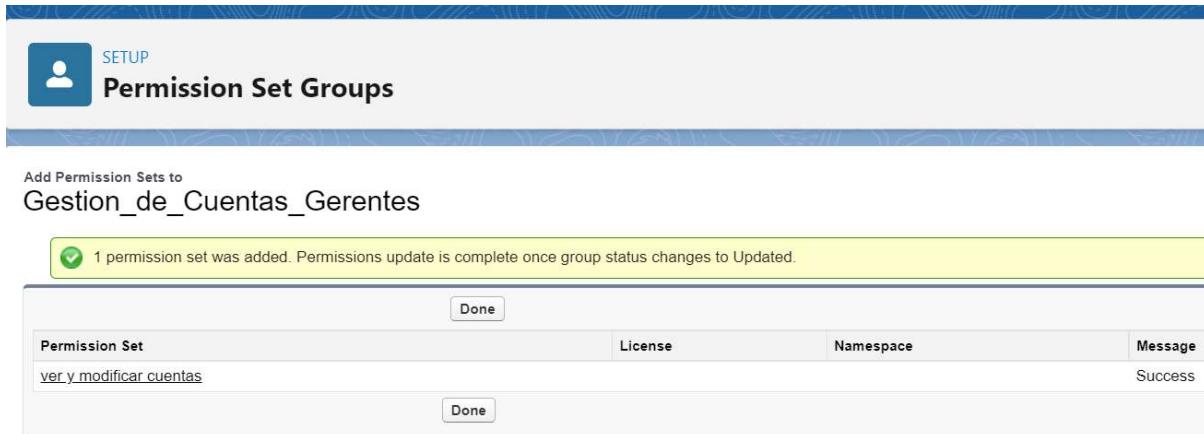
- \* Usuario 2.
- \* Usuario 3.



The screenshot shows the Salesforce 'Permission Set Groups' page under the 'SETUP' tab. The title is 'Permission Set Groups' and the sub-page is 'Assignment Summary' for 'Gestion de Cuentas Gerentes'. A success message states: 'Permission set group group Gestion de Cuentas Gerentes has been assigned to 2 users.' The table below lists the assigned users:

Full Name	Username	User License	Message
user two	usertwo@emailtwo.com	Salesforce Platform	Success
user three	userthree@mailthree.com	Salesforce Platform	Success

\* Crea una regla de colaboración que permita que los miembros del Grupo “Gestión de Cuentas gerentes”, puedan ver y modificar los registros de cuentas de las que son propietarios los miembros del grupo.



SETUP

Permission Set Groups

Add Permission Sets to  
Gestion\_de\_Cuentas\_Gerentes

1 permission set was added. Permissions update is complete once group status changes to Updated.

Permission Set	License	Namespace	Message
ver y modificar cuentas			Success

## Usuario 02

Puede acceder a todas las cuentas creadas por los otros usuarios, siendo otorgado el acceso gracias a que pertenece al mismo grupo que User03

## Usuario 03

Puede acceder a todas las cuentas creadas por los otros usuarios

# Sesión 03

# **Modelado de Datos.**

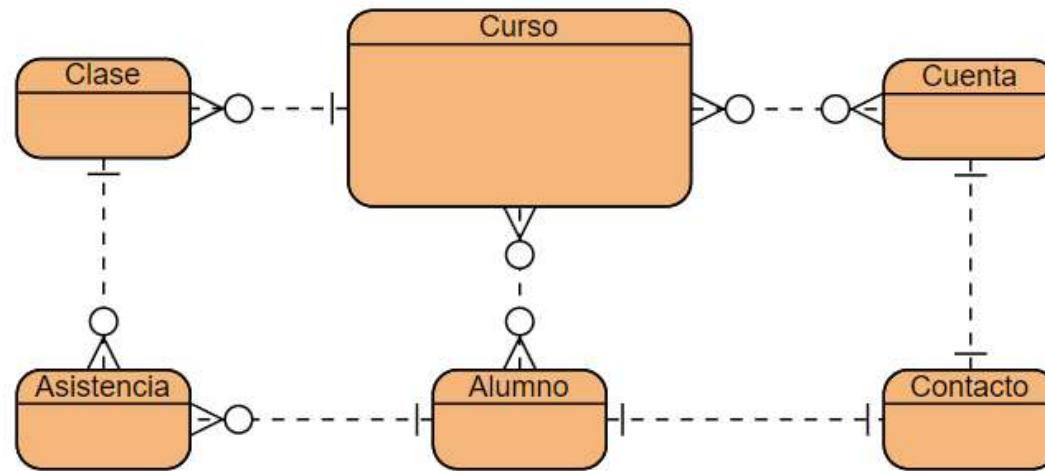
Nos permite crear registros de “Cursos” relacionados con clientes(Cuentas)

Nos permite registrar “Alumnos” y relacionarlos a registros nuevos o existentes de Contactos(Contacts)

Nos permite registrar “Clases” o “Sesiones” de esos “Cursos”

Nos permite registrar las “Asistencias” a la “Clase”

Nos permite visualizar un resumen de las asistencias por “Clase”



SETUP  **Object Manager**

50+ Items, Sorted by Last Modified

Q, Quick Find Schema Builder 

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Inventory	Inventory_c	Custom Object		24/05/2022	✓
OpportunityLineItem	OpportunityLineItem_c	Custom Object		24/05/2022	✓
PriceBookEntry	PriceBookEntry_c	Custom Object		24/05/2022	✓
PriceBook	PriceBook_c	Custom Object		24/05/2022	✓
Opportunity	Opportunity_c	Custom Object		24/05/2022	✓
Product	Product_c	Custom Object		24/05/2022	✓

## Opportunity Field Dependencies

Help for this Page 

[« Back to Custom Object: Opportunity](#)

This page allows you to define dependencies between fields (e.g., dependent picklists).

**Field Dependencies** 

Action	Controlling Field	Dependent Field	Modified By
<a href="#">Edit</a>   <a href="#">Delete</a>	StageName	Probability	Edwin Isaac Estrada Rodríguez, 24/05/2022 13:57

# Product\_\_c

## Fields & Relationships

7 Items, Sorted by Field Label

Quick Find  New Deleted Fields Field Dependencies S

FIELD LABEL	▲ FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Description	Description_c	Long Text Area(4000)		
IsActive	IsActive_c	Checkbox		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Product Name	Name	Text(80)		✓
ProductCode	ProductCode_c	Text(255)		

# Opportunity\_\_c

SETUP > OBJECT MANAGER

## Opportunity

& Relationships

layouts

Record Pages

Links, and Actions

act Layouts

sets

Limits

Types

Lookup Filters

tion Rules

ng Rules

rs

tion Rules

### Fields & Relationships

9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Account	Account_c	Lookup(Account)
CloseDate	CloseDate_c	Date
Created By	CreatedById	Lookup(User)
Description	Description_c	Text Area(255)
Last Modified By	LastModifiedById	Lookup(User)
Opportunity Name	Name	Text(80)
Owner	OwnerId	Lookup(User,Group)
Probability	Probability_c	Picklist
StageName	StageName_c	Picklist

PriceBook\_\_c

PriceBook

### Fields & Relationships

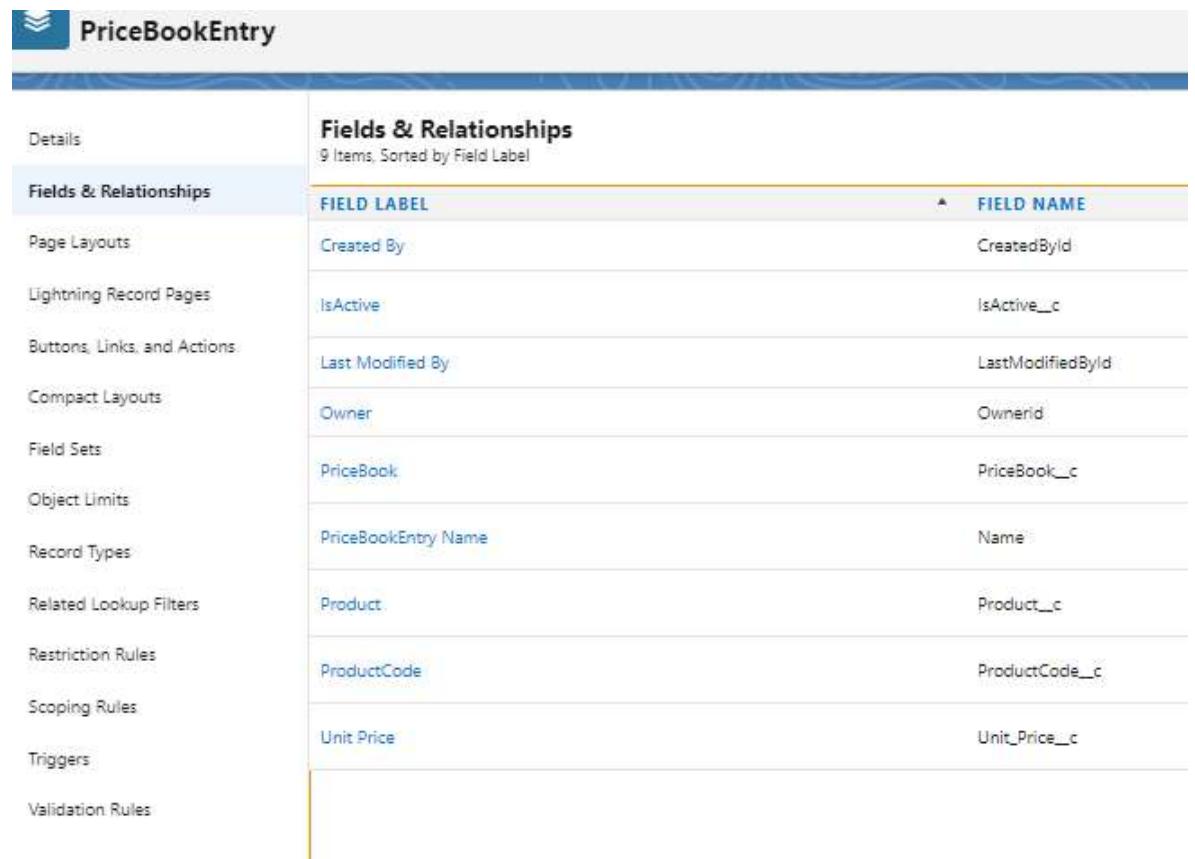
6 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME
Created By	CreatedById
Description	Description_c
IsActive	IsActive_c
Last Modified By	LastModifiedById
Owner	OwnerId
PriceBook Name	Name

OpportunityLineItem\_\_c

Fields & Relationships	
13 items. Sorted by Field Label	
FIELD LABEL	FIELD NAME
Created By	CreatedById
Description	Description__c
Last Modified By	LastModifiedById
ListPrice	ListPrice__c
Opportunity	Opportunity__c
OpportunityLineItem Name	Name
Owner	OwnerId
Product	Product__c
ProductCode	ProductCode__c
Quantity	Quantity__c
ServiceDate	ServiceDate__c
TotalPrice	TotalPrice__c
UnitPrice	UnitPrice__c

PriceBookEntry\_\_c



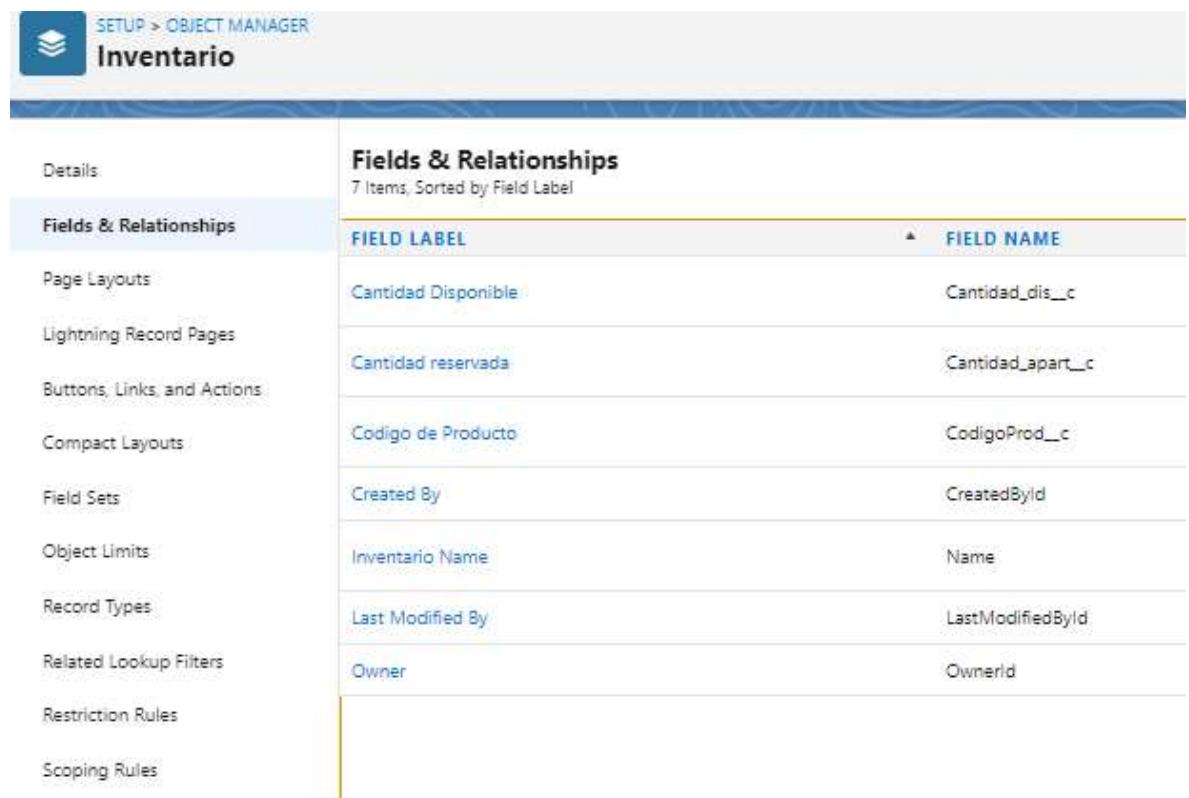
PriceBookEntry

Fields & Relationships

9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME
Created By	CreatedById
IsActive	IsActive__c
Last Modified By	LastModifiedById
Owner	OwnerId
PriceBook	PriceBook__c
PriceBookEntry Name	Name
Product	Product__c
ProductCode	ProductCode__c
Unit Price	Unit_Price__c

Inventario\_\_c



The image shows the Salesforce Setup Object Manager interface. The top navigation bar indicates 'SETUP > OBJECT MANAGER'. The main title is 'Inventario'. On the left, a sidebar lists various object settings: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, and Scoping Rules. The main content area is titled 'Fields & Relationships' with a sub-note '7 Items, Sorted by Field Label'. A table lists the field labels and their corresponding field names.

FIELD LABEL	FIELD NAME
Cantidad Disponible	Cantidad_dis_c
Cantidad reservada	Cantidad_apart_c
Codigo de Producto	CodigoProd_c
Created By	CreatedById
Inventario Name	Name
Last Modified By	LastModifiedById
Owner	OwnerId

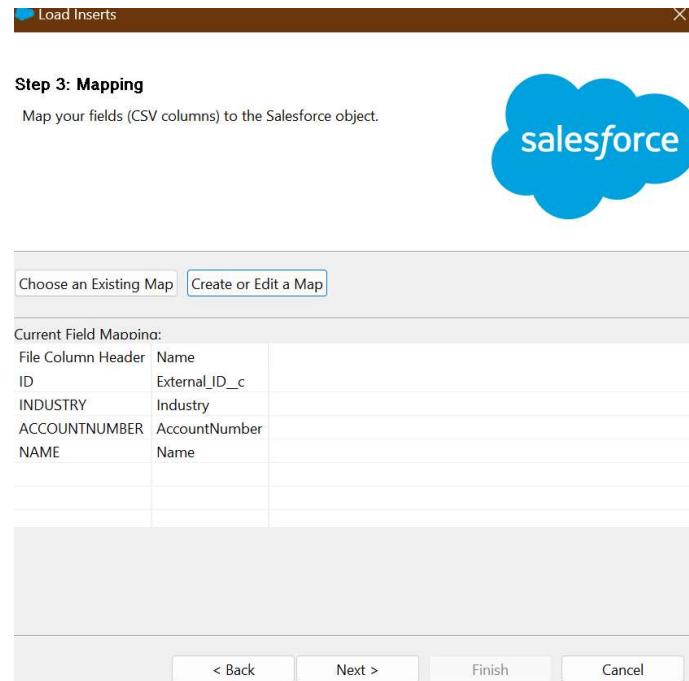
# Sesión 04

# Gestión de Datos

Exportamos  
cuentas originales  
y cambiamos  
nombres, algunos  
ID se repiten.

	A	B	C	D
1	ACCOUNTNUMBER	ID	INDUSTRY	NAME
2		001IY000002Yp87YAC		A
3	CD451796	001IY000002Yp7vYAC	Electronics	B
4	CD656092	001IY000002Yp7wYAC	Apparel	C
5	CC213425	001IY000002Yp7xYAC	Construction	D
6	CC634267	001IY000002Yp7yYAC	Consulting	E
7	CD439877	001IY000002Yp7zYAC	Hospitality	F
8	CD355118	001IY000002Yp80YAC	Energy	G
9	CC947211	001IY000002Yp81YAC	Transportation	H
10	CD736025	001IY000002Yp82YAC	Education	I
11	CD355119-A	001IY000002Yp83YAC	Energy	J
12	CD355120-B	001IY000002Yp84YAC	Energy	K
13	CC978213	001IY000002Yp85YAC	Biotechnology	L
14		001IY000002Yp86YAC		M
15		001IY000002bGAUYA2		N
16		001IY000002bDvmYAE		O
17		001IY000002ahVfyAI		P
18		001IY000002ahW4YAI		Q
19		001IY000002ahKfyAY		R
20		001IY000002ahf6YAA		S
21		001IY000002ahVkyAI		T
22		001IY000002ahYeYAI		U
23		001IY000002ahheSYAQ		V
24		001IY000002ahdeYAA		W

Asignamos External\_ID al ID



Load Inserts

Step 3: Mapping

Map your fields (CSV columns) to the Salesforce object.

salesforce

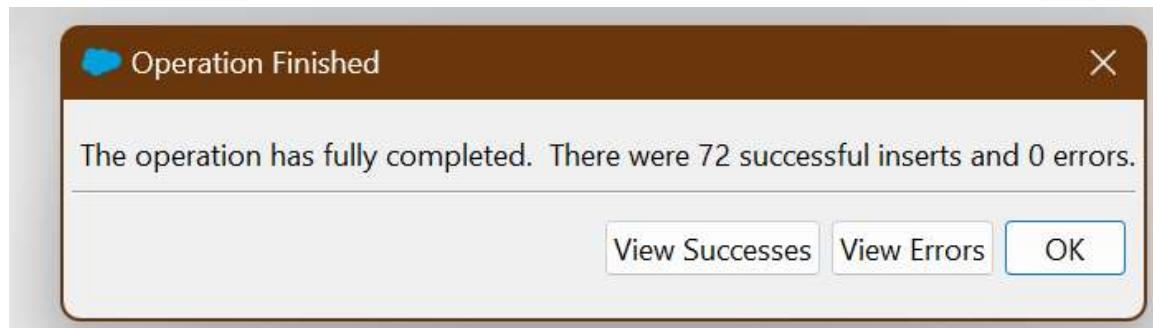
Choose an Existing Map [Create or Edit a Map](#)

Current Field Mapping:

File Column Header	Name
ID	External_ID_c
INDUSTRY	Industry
ACCOUNTNUMBER	AccountNumber
NAME	Name

< Back Next > Finish Cancel

Sin errores



Operation Finished

The operation has fully completed. There were 72 successful inserts and 0 errors.

[View Successes](#) [View Errors](#) [OK](#)

# Importando contactos

CSV Viewer

Row Number	ID	FIRSTNAME	LASTNAME	MOBILEPHONE	STATUS
1	003IY000001tV1BYAU	Rose	Gonzalez	(512) 757-9340	Item Created
2	003IY000001tV1CYAU	Sean	Forbes	(512) 757-4561	Item Created
3	003IY000001tV1DYAU	Jack	Rogers		Item Created
4	003IY000001tV1EYAU	Pat	Stumuller	(014) 454-6364	Item Created
5	003IY000001tV1FYAU	Andy	Young	(785) 265-53501	Item Created
6	003IY000001tV1GYAU	Tim	Barr	(312) 596-1230	Item Created
7	003IY000001tV1HYAU	John	Bond	(312) 596-1563	Item Created
8	003IY000001tV1IYAU	Stella	Pavlova	(212) 842-5501	Item Created
9	003IY000001tV1JYAU	Lauren	Boyle	(212) 842-5611	Item Created
10	003IY000001tV1KYAU	Babara	Levy	(503) 421-5451	Item Created
11	003IY000001tV1LYAU	Josh	Davis	(503) 421-4387	Item Created
12	003IY000001tV1MYAU	Jane	Grey	(520) 773-4539	Item Created
13	003IY000001tV1NYAU	Arthur	Song	(212) 842-4535	Item Created
14	003IY000001tV1OYAU	Ashley	James	+44 191 3456234	Item Created

Operation Finished

The operation has fully completed. There were 53 successful inserts and 0 errors.

[View Successes](#) [View Errors](#) [OK](#)

Creamos un custom formula field en el objeto contactos, cuya formula regrese un texto con el campo Account.External\_ID\_\_c

The screenshot shows the 'New Custom Field' wizard in Salesforce, specifically Step 3: Enter formula. The page title is 'Contact New Custom Field'. The sub-step title is 'Step 3. Enter formula' (Step 3 of 5). The main area contains a text input field with the formula 'External\_ID (Text) = Account.External\_ID\_\_c'. To the right of the input field are buttons for 'Insert Field', 'Insert Operator', and 'Functions'. A 'Quick Tips' box is visible on the right, containing links to 'Getting Started' and 'Operators & Functions'. Below the input field, there is an example formula 'Full Name = LastName & ", " & FirstName' and a link to 'More Examples...'. The left sidebar lists various object settings: Fields & Relationships, Layouts, Record Pages, Links, and Actions, Contact Layouts, Sets, and Record Limits.

## Relación entre Contact y Account a través de External\_ID\_\_c

Contact  
**Mr. Andy Young**

Account Name

Title

Department

Reports To

Lead Source

Account  
[Edge Communications](#)

External\_ID  
7j8m97890

Account  
**Edge Communications**

Account Site

Type  
Customer - Direct

Industry  
Electronics

Annual Revenue  
\$139,000,000

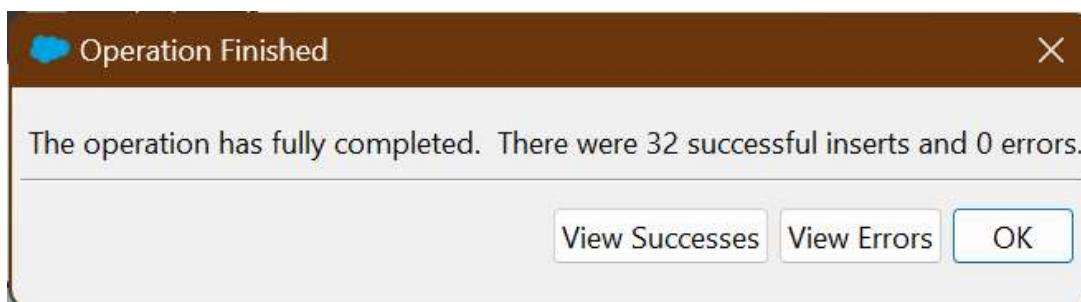
utilidades  
\$139,000.00

antigüedad  
7.47

External ID  
7j8m97890

- Realizar una “carga inicial” de registros de Products\\_\\_c, Pricebook\\_\\_c y PriceBookEntry\\_\\_c, implementando los campos de Id. Externo (para uso en la funcionalidad de Oportunidades personalizadas). Carga mínima de 25 registros.

Importamos los registros hacia Products, Pricebook y PriceBookEntry.



**Products**

CSV Viewer

Row Number	ID	DESCRIPTION_C	EXTERNAL_ID_C	ID	NAME	STATUS
1	a05IY000000G3a8YAC	descripcion 1	235490nfg	a05IY000000G3a8YAC	objeto 1	Item Created
2	a05IY000000G3a9YAC	descripcion 2	234jm9c79	a05IY000000G3a9YAC	objeto 2	Item Created
3	a05IY000000G3aAYAS	descripcion 3	b623brth	a05IY000000G3aAYAS	objeto 3	Item Created
4	a05IY000000G3aBYAS	descripcion 4	vw45s	a05IY000000G3aBYAS	objeto 4	Item Created
5	a05IY000000G3aCYAS	descripcion 5	245y 2345yb	a05IY000000G3aCYAS	objeto 5	Item Created
6	a05IY000000G3aDYAS	descripcion 6	ujio	a05IY000000G3aDYAS	objeto 6	Item Created
7	a05IY000000G3aFYAS	descripcion 7	rtyb245	a05IY000000G3aFYAS	objeto 7	Item Created
8	a05IY000000G3aGYAS	descripcion 8	e5rtyb4526	a05IY000000G3aGYAS	objeto 8	Item Created
9	a05IY000000G3aHYAS	descripcion 9	23456b1234b	a05IY000000G3aHYAS	objeto 9	Item Created
10	a05IY000000G3aIYAS	descripcion 10	2345b1234b	a05IY000000G3aIYAS	objeto 10	Item Created
11	a05IY000000G3aLYAS	descripcion 11	2345b1234b5	a05IY000000G3aLYAS	objeto 11	Item Created
12	a05IY000000G3aJYAS	descripcion 12	12345b1234b	a05IY000000G3aJYAS	objeto 12	Item Created
13	a05IY000000G3aKYAS	descripcion 13	n556n3	a05IY000000G3aKYAS	objeto 13	Item Created
14	a05IY000000G3aLYAS	descripcion 14	rtynerwet	a05IY000000G3aLYAS	objeto 14	Item Created

To open the CSV in the associated external program such as Microsoft Excel, click the button below.

[Open in external program](#) [Close](#)

# PriceBook

 Operation Finished X

The operation has fully completed. There were 29 successful inserts and 0 errors.

[View Successes](#) [View Errors](#) [OK](#)

 CSV Viewer Load inserts

Row Number	ID	EXTERNAL_ID_C	NAME	STATUS
1	a07IY0000008rvBYAQ	j890'34fg	PriceBook1	Item Created
2	a07IY0000008rvCYAQ	2345g	PriceBook2	Item Created
3	a07IY0000008rvDYAQ	567n3	PriceBook3	Item Created
4	a07IY0000008rvEYAQ	w45g6b	PriceBook4	Item Created
5	a07IY0000008rvFYAQ	q34c5	PriceBook5	Item Created
6	a07IY0000008rvGYAQ	23v45	PriceBook6	Item Created
7	a07IY0000008rvHYAQ	34c5v6	PriceBook7	Item Created
8	a07IY0000008rvIYAQ	34v6b7	PriceBook8	Item Created
9	a07IY0000008rvJYAQ	456b78	PriceBook9	Item Created
10	a07IY0000008rvKYAQ	567n89	PriceBook10	Item Created
11	a07IY0000008rvLYAQ	67n89	PriceBook11	Item Created
12	a07IY0000008rvMYAQ	456b78	PriceBook12	Item Created
13	a07IY0000008rvNYAQ	2345v7	PriceBook13	Item Created
14	a07IY0000008rvOYAQ	2v345	PriceBook14	Item Created

To open the CSV in the associated external program such as Microsoft Excel, click the button below

[Open in external program](#) [Close](#)

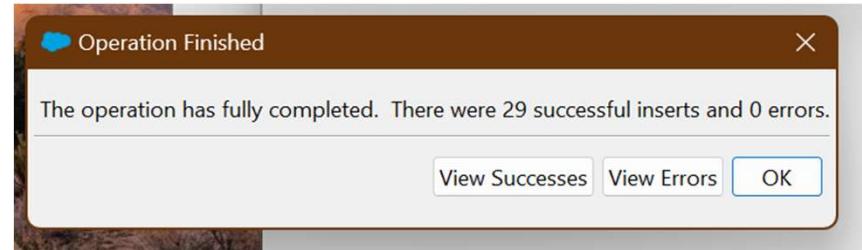
# PriceBookEntry

CSV Viewer

Row Number	ID	EXTERNAL_ID_C	NAME	STATUS
1	a08IY000000D2hYYAS	j890'34fg	PriceBook1	Item Created
2	a08IY000000D2hZYAS	2345g	PriceBook2	Item Created
3	a08IY000000D2haYAC	567n3	PriceBook3	Item Created
4	a08IY000000D2hbYAC	w45g6b	PriceBook4	Item Created
5	a08IY000000D2hcYAC	q34c5	PriceBook5	Item Created
6	a08IY000000D2hdYAC	23v45	PriceBook6	Item Created
7	a08IY000000D2heYAC	34c5v6	PriceBook7	Item Created
8	a08IY000000D2hfYAC	34v6b7	PriceBook8	Item Created
9	a08IY000000D2hgYAC	456b78	PriceBook9	Item Created
10	a08IY000000D2hhYAC	567n89	PriceBook10	Item Created
11	a08IY000000D2hiYAC	67n89	PriceBook11	Item Created
12	a08IY000000D2hjYAC	456b78	PriceBook12	Item Created
13	a08IY000000D2hkYAC	2345v7	PriceBook13	Item Created
14	a08IY000000D2hlYAC	2v345	PriceBook14	Item Created
15	a08IY000000D2hmYAC	2v345	PriceBook15	Item Created
16	a08IY000000D2hnYAC	356b78	PriceBook16	Item Created
17	a08IY000000D2hoYAC	467n8	PriceBook17	Item Created
18	a08IY000000D2hpYAC	56n89	PriceBook18	Item Created

To open the CSV in the associated external program such as Microsoft Excel, click the button below.

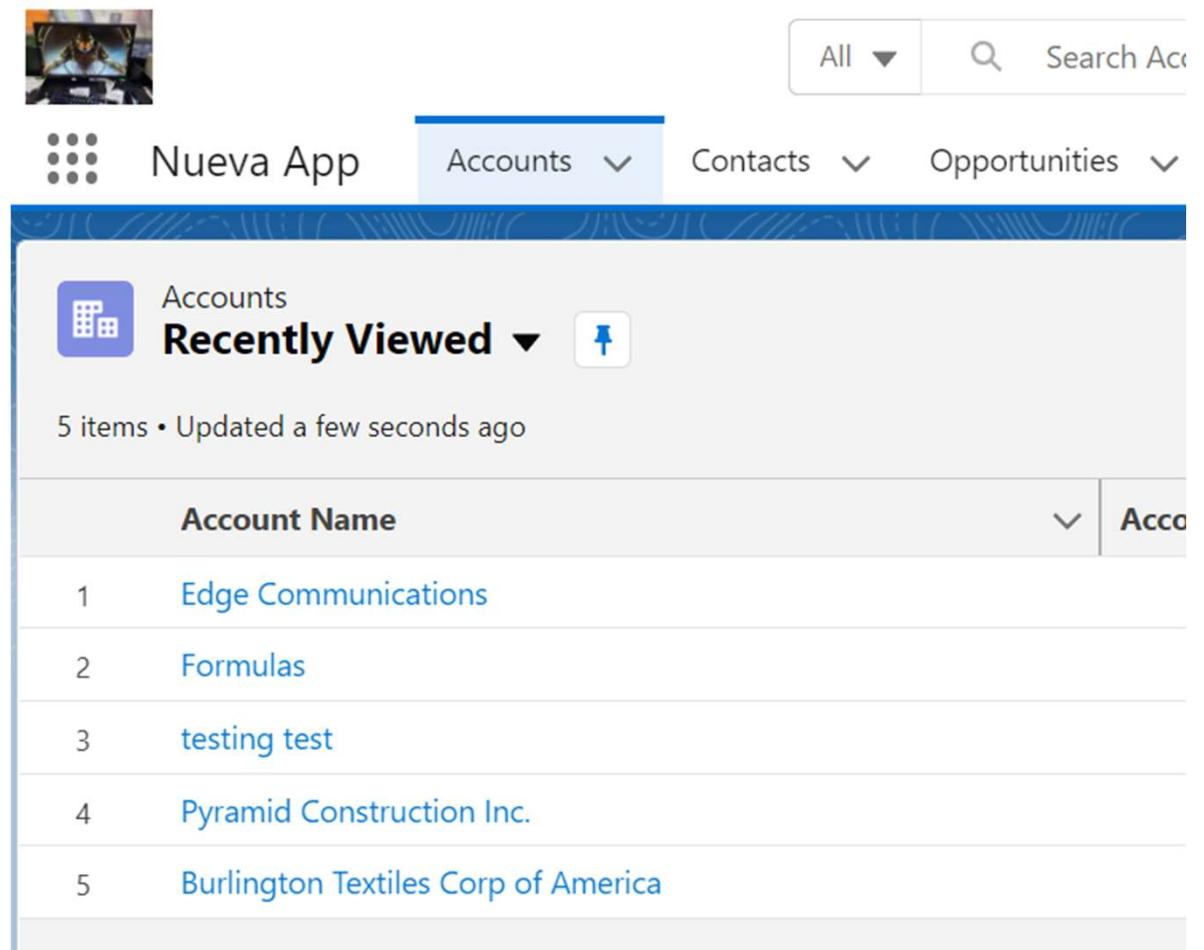
[Open in external program](#) [Close](#)



# Sesión 05

# Lightning experience

Crea una nueva App y  
agrega las fichas  
correspondientes:  
Cuentas  
Contactos  
Oportunidades(Custom)



The screenshot shows a custom Salesforce application interface. At the top, there is a navigation bar with a user profile picture, a search bar, and buttons for 'All', 'Accounts', 'Contacts', and 'Opportunities'. The main content area is titled 'Accounts' and 'Recently Viewed'. It displays a list of 5 recently viewed accounts, each with a rank (1-5), an account name, and a blue 'Edit' button. The account names listed are: 1. Edge Communications, 2. Formulas, 3. testing test, 4. Pyramid Construction Inc., and 5. Burlington Textiles Corp of America.

Rank	Account Name	Action
1	Edge Communications	
2	Formulas	
3	testing test	
4	Pyramid Construction Inc.	
5	Burlington Textiles Corp of America	

Usuario 1 No puede agregar la dirección a la hora de crear un nuevo record.

Podemos observar que para usuario 2 esto sí es posible.

Logged in as user one (userone@emailone.com) [Log out as user one](#)

Annual Revenue

External ID

SIC Code

SIC Description

**Additional Information**

Customer Priority  --None--

SLA  --None--

SLA Expiration Date  [Calendar](#)

SLA Serial Number

Number of Locations

Upsell Opportunity  --None--

Active  --None--

[Description Information](#)

[Cancel](#) [Save & New](#) [Save](#)

Logged in as user two (usertwo@emailtwo.com) [Log out as user two](#)

External ID

SIC Description

**Address Information**

**Billing Address**

Billing Street

Billing Zip/Postal Code

Billing City

Billing State/Province

Billing Country

**Shipping Address**

Shipping Street

Shipping Zip/Postal Code

Shipping City

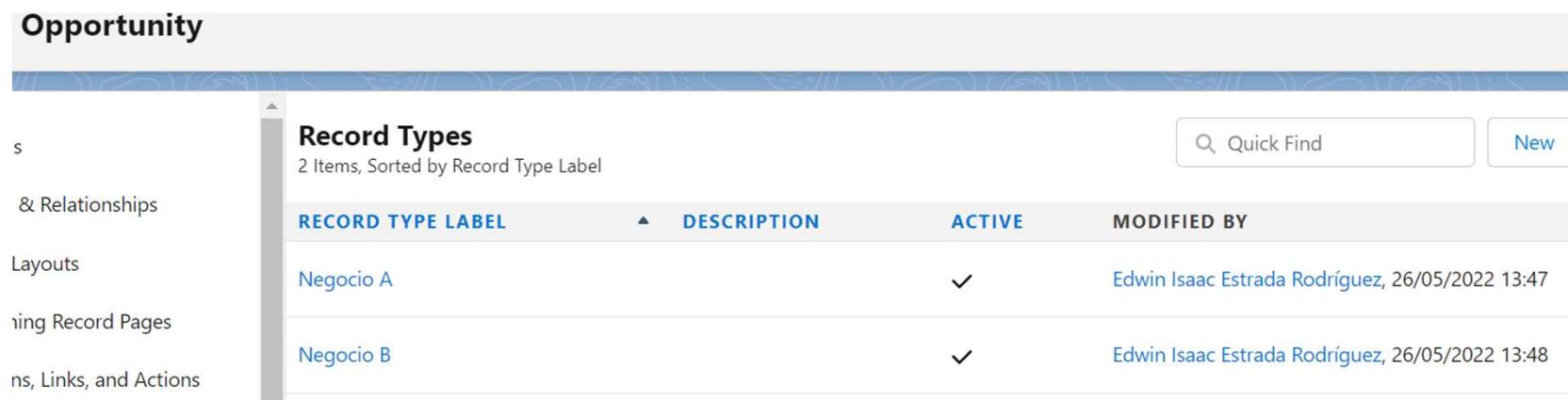
Shipping State/Province

Shipping Country

[Additional Information](#)

[Cancel](#) [Save & New](#) [Save](#)

Crear dos nuevos tipos de registro de Oportunidades y asignarles el mismo formato de página.



The screenshot shows the Salesforce Opportunity Record Types page. The left sidebar has links for Home, Objects & Relationships, Layouts, Record Pages, and Links, and Actions. The main content area has a title 'Record Types' with a subtitle '2 Items, Sorted by Record Type Label'. It includes a 'Quick Find' search bar and a 'New' button. A table lists two record types: 'Negocio A' and 'Negocio B'. The table columns are 'RECORD TYPE LABEL', 'DESCRIPTION' (which is collapsed), 'ACTIVE', and 'MODIFIED BY'. Both entries were modified by 'Edwin Isaac Estrada Rodríguez' on '26/05/2022 13:47'.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Negocio A	▼	Edwin Isaac Estrada Rodríguez, 26/05/2022 13:47	
Negocio B	▼	Edwin Isaac Estrada Rodríguez, 26/05/2022 13:48	

Para los nuevos tipos de registro de la Oportunidad, defina los valores disponibles del campo de lista de selección “StageName” como se indica

**Opportunity**

**Negocio A**

Field Label	StageName
Record Type	Negocio A

**Picklist Values**

Select an item from the Available Values list and add it to the Selected remove it from any existing records. Finally, select a default picklist val

Available Values	Selected Values
Prospecting Id. Decision Makers Negotiation/Review	Qualification Needs Analysis Value Proposition Perception Analysis Proposal/Price Quote Closed Won Closed Lost

Add  
Remove

**Opportunity**

**Negocio B**

Field Label	StageName
Record Type	Negocio B

**Picklist Values**

Select an item from the Available Values list and add it to the remove it from any existing records. Finally, select a default ;

Available Values	Selected Values
--None--	Prospecting Qualification Needs Analysis Value Proposition Id. Decision Makers Perception Analysis Proposal/Price Quote Negotiation/Review Closed Won Closed Lost

Add  
Remove

# **Sesión 06**

## **Implementación de la lógica de negocio I**

- Crear un campo fórmula que muestre la valoración de la Cuenta en los registros de opportunity\_\_c y valida cuando se presentan valores en blanco o nulos. Nombre del campo: Valoración de la cuenta.

Opportunity	oportunité
Edwin Isaac Estrada Rodríguez	
Private	
<input type="checkbox"/>	
Opportunity Name	
oportunité	
Account Name	
Comfortable INC - User02	
Type	
Lead Source	
Expected Revenue	
Close Date	
27/05/2022	
Next Step	
idk	
Stage	
Value Proposition	
Probability (%)	
50 %	
Account Rating	

Crear un campo de resumen de la suma del precio total de los Productos de Oportunidad “Custom”(OpportunityLineItem\_\_c). Nombre del campo: Monto total

**Opportunity**

**Step 3. Define the summary calculation**

**Select Object to Summarize**

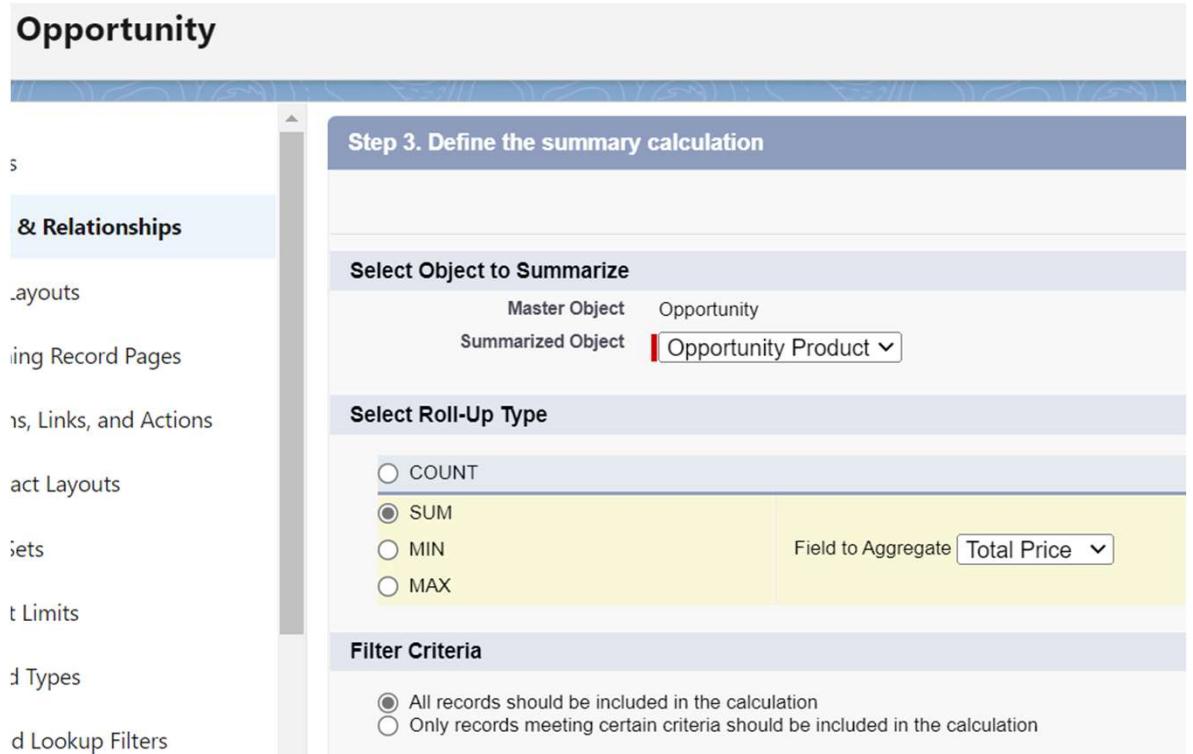
Master Object: Opportunity  
Summarized Object: **Opportunity Product**

**Select Roll-Up Type**

COUNT  
 SUM  
 MIN  
 MAX  
Field to Aggregate: **Total Price**

**Filter Criteria**

All records should be included in the calculation  
 Only records meeting certain criteria should be included in the calculation



Crear un campo fórmula donde muestre el valor esperado de la Oportunidad "Custom"(Opportunity\_\_c), haciendo uso del campo de Probabilidad y el campo de resumen Monto total.  
Nombre del campo: Monto esperado

SETUP > OBJECT MANAGER

## Opportunity

Opportunity

### New Custom Field

Step 3. Enter formula

Enter your formula and click Check Syntax to check for errors. Click functions.

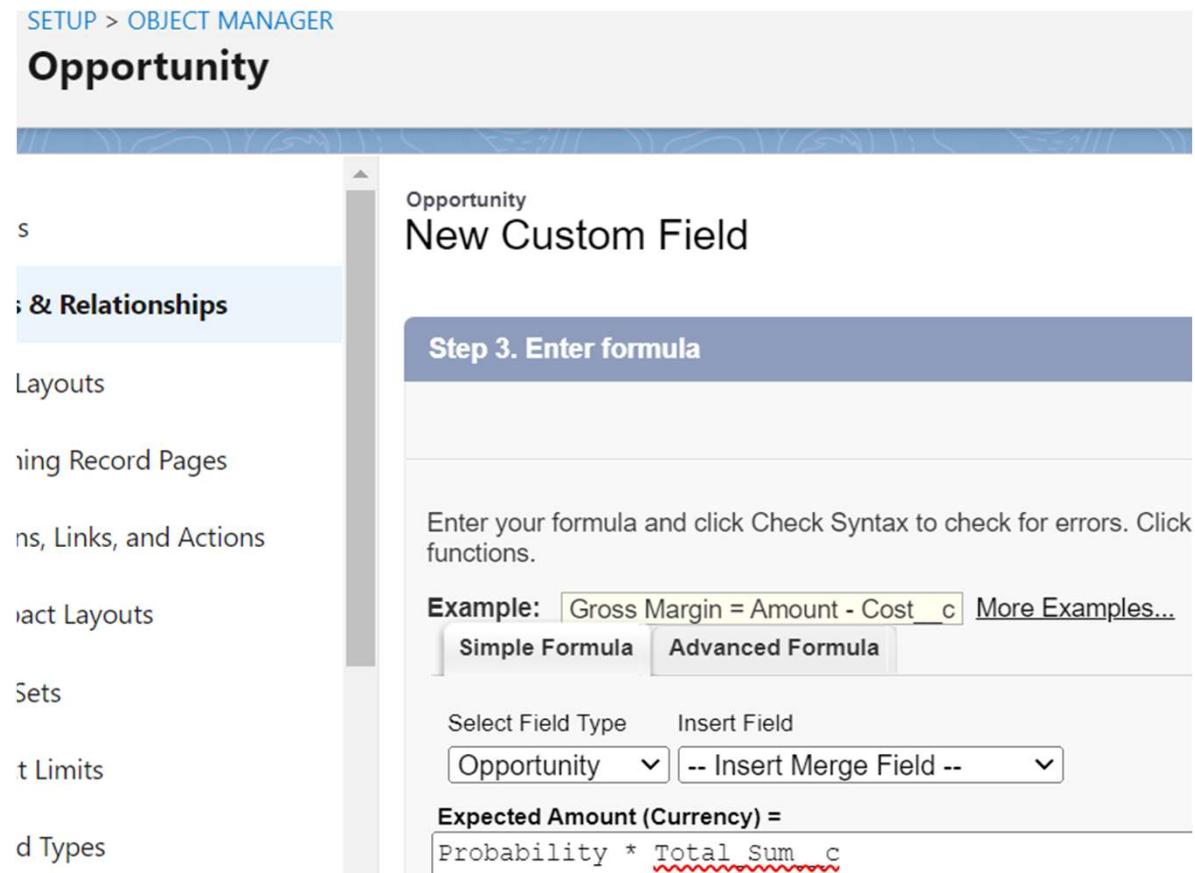
Example: Gross Margin = Amount - Cost\_\_c [More Examples...](#)

[Simple Formula](#) [Advanced Formula](#)

Select Field Type

**Expected Amount (Currency) =**

Probability \* Total Sum\_\_c



- Crear una regla de validación que no permite modificar el registro de la Oportunidad “custom” cuando se encuentre en la Etapa de ‘Closed Won’ o ‘Closed Lost’

SETUP > OBJECT MANAGER

## Opportunity

Opportunity Validation Rule

Back to Opportunity Validation Rules

**Validation Rule Detail**

Rule Name	validar_si_closed
Error Condition Formula	OR( ISPICKVAL(PRIORVALUE(StageName), 'Closed Won'), ISPICKVAL(PRIORVALUE(StageName), 'Closed Lost') )
Error Message	ERROR CANNOT CHANGE AFTER CLOSED
Description	
Created By	<a href="#">Edwin Isaac Estrada Rodríguez</a> , 30/05/2022 12:43

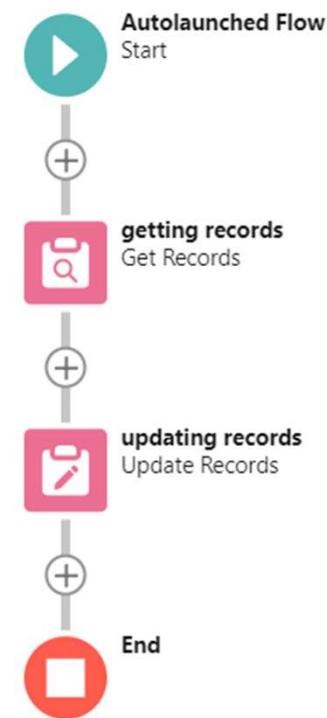
[Edit](#) [Clone](#)

S & Relationships  
Layouts  
Sharing Record Pages  
Buttons, Links, and Actions  
Object Layouts  
Sets  
Object Limits  
Object Types

# Sesión 07

## **Implementación de la lógica de negocio II**

- Crear un nuevo Flujo llamado “Asigna Precio de Lista”, que actualice el valor del campo de ListPrice y Unit Price del objeto Opportunity Line Item(Custom)(OpportunityLineItem\_\_c), basado en el valor del campo de Unit Price del objeto Price Book Entry(Custom)(PriceBookEntry\_\_c). Considera que el Flow debe ser ejecutado desde un Proceso(Process Builder) y debe tener como entrada los campos necesarios para realizar la consulta de los registros necesarios correspondientes(Código de Producto(de la relación del Opportunity Line Item(Custom), Id del registro de Opportunity Line Item(Custom) recientemente modificado, y el Id del registro de Price Book(Custom) definido en el registro padre de Opportunity(Custom)).



# Get records process

Edit Get Records

Find Salesforce records and store their field values in flow variables.

**get price (get\_price)** 

Get Records of This Object

\* Object

Filter PriceBookEntry Records

 With no conditions, the flow retrieves **all** PriceBookEntry records.

Condition Requirements

Sort PriceBookEntry Records

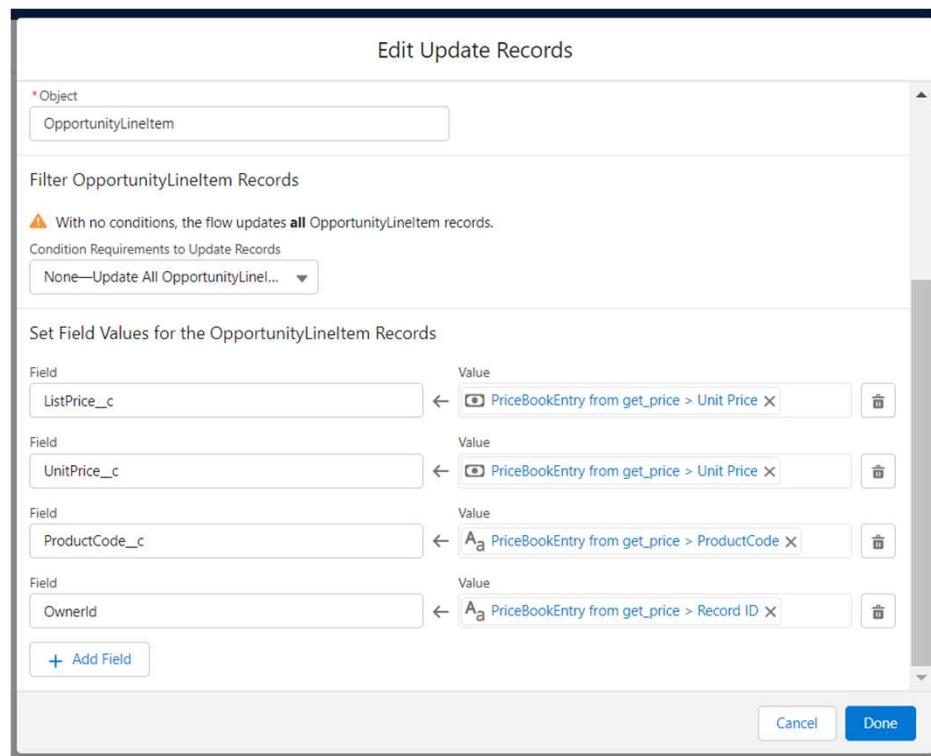
Sort Order   If you store only the first record, filter by a unique field, such as ID.

How Many Records to Store

Only the first record

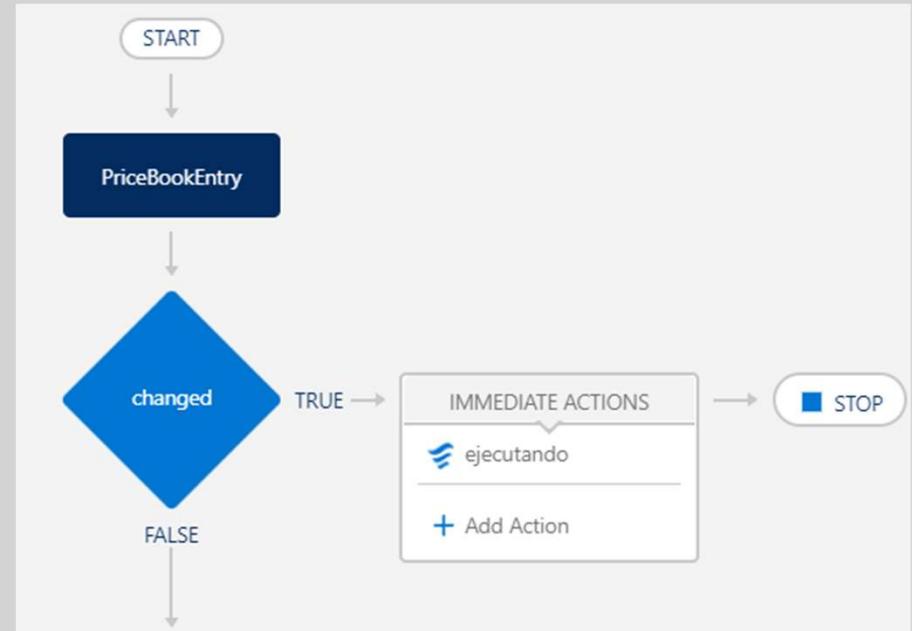
All records

# Update records



# Proceso que ejecuta el flow

- Crear un nuevo Proceso(Process Builder) que detecte cuando se ha creado y/o modificado un registro de Producto de Oportunidad(OpportunityLineItem\_\_c), específicamente al cambio de Producto, considerando el campo de Lista de Precios(campo de relación a PriceBook\_\_c, presente en el registro padre de Oportunidad(Custom)(Opportunity)) y que ejecute un Flujo(Flow Builder) llamado “Asigna Precio de Lista” enviando los parámetros/variables correspondientes para lograr esta asignación/actualización(Id. de la Lista de Precios, Id. del registro de Producto de Oportunidad, Código de Producto).



# **Sesión 08**

## **Reportes y tableros**

- Crea un reporte que agrupe los registros de Oportunidades(Opportunity\\_\\_c), por Etapa, por Propietario y por Fecha de Cierre (haciendo que la fecha de cierre se considere por mes), agregar el filtro de que sólo se puedan ver las Oportunidades con fecha de cierre de los últimos 3 meses.

Nombre del Reporte:  
Oportunidades del trimestre

×

Show Me   
 All opportunities

Close Date   
 Last 90 Days (3 Mar 2022 - 31 May 2022)

Opportunity Status   
 Any

Probability   
 All

Filter by Close Date ×

Date

Close Date

Range

Range

Last 90 Days

3 Mar 2022 - 31 May 2022 Customize

Cancel Apply

Trimester Opportunities

↗ Opp

Outline Filters 1

Groups GROUP ROWS

Opportunity Owner ×

Close Date ×

Stage ×

- Crea un reporte donde se identifiquen las Oportunidades que se han cerrado ganadas recientemente (últimos 6 meses) para validar el volumen de la tendencia mensual.
- Nombre del Reporte: Oportunidades cerradas en el semestre.

REPORT ▾

Oportunidades cerradas en el semestre. [Edit](#) [Opportunities](#)

Previewing a limited number of records. Run the report

Owner Role [Owner Role](#) Opportunity Owner [Opportunity Owner](#)

Filter by Close Date [X](#)

Date [Close Date](#)

Range [Current and Previous CQ](#)

1 Jan 2022 - 30 Jun 2022 [Customize](#)

Cancel [Apply](#)

Fields > Filters 1

Filters

Add filter... [🔍](#)

Show Me [All opportunities](#)

Close Date  
Current FQ (1 Apr 2022 - 30 Jun 2022)

Opportunity Status  
Any

Probability  
All

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# GRACIAS!

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