

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 \(salesforce.com\)](https://trailhead.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 tenemos 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.



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

Rename

Disconnect

Launch

Username creative-badger-bnbp01.com

Type Trailhead Playground

Created 5/18/2022

Last Activity Created on 5/18/2022

Full



Search Setup



Setup

Home

Object Manager

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.



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**

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

<input type="checkbox"/>	Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit	Chatter Expert	Chatter	chatty.00diy000000ixyn2as.85oamzet66gm@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>	Edit	Estrada Rodríguez, Edwin Isaac	FEstr	edwin.estro@creative-badger-bnbp01.com		✓	System Administrator
<input type="checkbox"/>	Edit	one_user	uone	userone@emailone.com	CEO	✓	Standard Platform User
<input type="checkbox"/>	Edit	three_user	uthre	userthree@mailthree.com	COO	✓	Standard Platform User
<input type="checkbox"/>	Edit	two_user	utwo	usertwo@emailtwo.com	CEO	✓	Standard Platform User
<input type="checkbox"/>	Edit	User_Integration	integ	integration@00diy000000ixyn2as.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	User_Security	sec	insightssecurity@00diy000000ixyn2as.com		✓	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"/>
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"/>
Background Operations	<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"/>
Communication Subscriptions	<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"/>
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"/>
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"/>
Contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input 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"/>
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"/>
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"/>
D&B Companies	<input checked="" 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"/>
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"/>
Documents	<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"/>
Ideas	<input checked="" type="checkbox"/>	<input checked="" 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"/>
Locations	<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"/>
Push Topics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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"/>
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

Email Opt Out	<input type="checkbox"/>	<input type="checkbox"/>
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.



User Edit

Save Save & 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"/>
Marketing User	<input type="text" value="Usuario acceso estándar"/>
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”

 **SETUP**
Users

Fax

Mobile

Email EncodingUnicode (UTF-8)

Employee Number

Used Data Space0 B [View](#)

Used File Space0 B [View](#)

Last Login

Last Password Change or ResetUnknown

Failed Login Attempts*i*

Individual

Created ByEdwin Isaac Estrada Rodríguez, 18/05/2022 03:34

Modified ByEdwin Isaac Estrada Rodríguez, 18/05/2022 12:58

[Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#)

Permission Set Assignments [Edit Assignments](#) [Permission Set Assignments Help ?](#)

Action	Permission Set Label	Date Assigned	Expires On
Del	Usuario acceso administrativo	18/05/2022	

Permission Set Assignments: Activation Required [Edit Assignments](#) [Permission Set Assignments: Activation Required Help ?](#)

No records to display

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

Last Name |

Alias |

Email |

Username |

Nickname | [i](#)

Title

Role | ▼

User License | ▼

Profile | ▼ [i](#)

Active ☐

Marketing User ☐

Offline User ☐

Knowledge User ☐

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](#)

User Edit

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

General Information

! = Required

First Name

Last Name

Alias

Email

Username

Nickname [i](#)

Role [i](#)

User License

Profile [i](#)

Active ☒

Marketing User ☐

Offline User ☐





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


SaveSave & NewCancel

General Information

First Name	<input type="text"/>	Role	<None Specified> 
Last Name	<input type="text" value="user5 user5"/>	User License	Salesforce Platform 
Alias	<input type="text" value="user5"/>	Profile	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”.

 **SETUP**
Sharing Settings

Organization-Wide Sharing Defaults Edit

[Help for this Page](#) ?

Edit your organization-wide sharing defaults below. Changing these defaults will cause all sharing rules to be recalculated. This could require significant system resources and time depending on the amount of data in your organization. Setting an object to Private makes records visible to record owners and those above them in the role hierarchy, and access can be extended using sharing rules.

Save Cancel

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

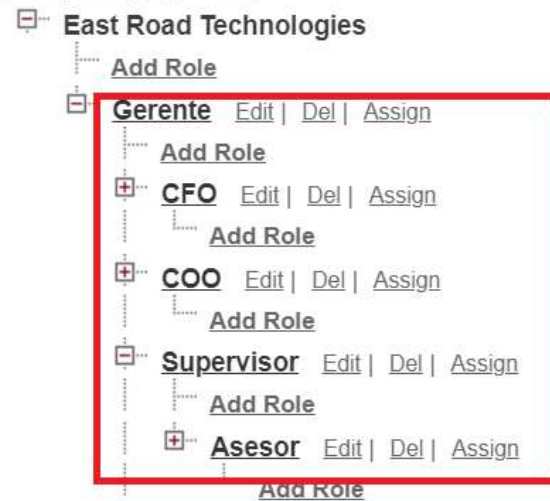
Asesor

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

 **SETUP**
Permission Set Groups

Assignment Summary Help for this Page ?

Gestion de Cuentas Gerentes


 Permission set group group Gestion de Cuentas Gerentes has been assigned to 2 users.

Done


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

Done

* 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.

Done

Permission Set	License	Namespace	Message
ver y modificar cuentas			Success

Done

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.

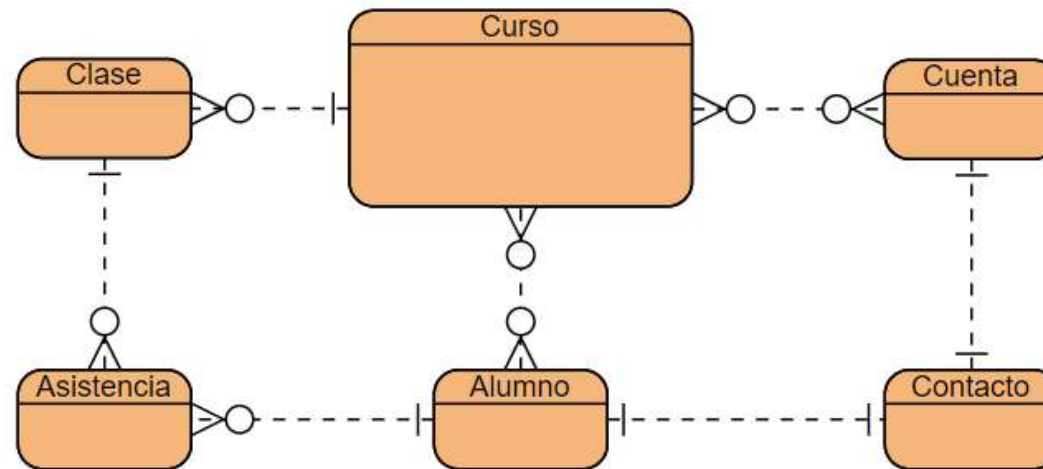
Nos permite crear registros de “Cursos” relacionados con clientes(Cuentas)

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

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

C

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Inventario	Inventario__c	Custom Object		24/05/2022	✓
OpportunityLinItem	OpportunityLinItem__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

New

Action	Controlling Field	Dependent Field	Modified By
Edit Del	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

Fields & Relationships

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

& Relationships

ayouts

ng Record Pages

s, Links, and Actions

ict Layouts

ets

Limits

Types

d Lookup Filters

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

SETUP > OBJECT MANAGER		
OpportunityLineItem		
Details	Fields & Relationships 13 Items, Sorted by Field Label	
Fields & Relationships	FIELD LABEL	FIELD NAME
Page Layouts	Created By	CreatedById
Lightning Record Pages	Description	Description__c
Buttons, Links, and Actions	Last Modified By	LastModifiedById
Compact Layouts	List Price	ListPrice__c
Field Sets	Opportunity	Opportunity__c
Object Limits	OpportunityLineItem Name	Name
Record Types	Owner	OwnerId
Related Lookup Filters	Product	Product__c
Restriction Rules	Product Code	ProductCode__c
Scoping Rules	Quantity	Quantity__c
Triggers	Service Date	ServiceDate__c
Validation Rules	Total Price	TotalPrice__c
	Unit Price	UnitPrice__c

PriceBookEntry__c

PriceBookEntry	
Details	
Fields & Relationships	Fields & Relationships 9 Items, Sorted by Field Label
Page Layouts	
Lightning Record Pages	
Buttons, Links, and Actions	
Compact Layouts	
Field Sets	
Object Limits	
Record Types	
Related Lookup Filters	
Restriction Rules	
Scoping Rules	
Triggers	
Validation Rules	

Inventario__c

SETUP > OBJECT MANAGER	
Inventario	
Details	Fields & Relationships 7 Items, Sorted by Field Label
Fields & Relationships	
Page Layouts	
Lightning Record Pages	
Buttons, Links, and Actions	
Compact Layouts	
Field Sets	
Object Limits	
Record Types	
Related Lookup Filters	
Restriction Rules	
Scoping Rules	
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

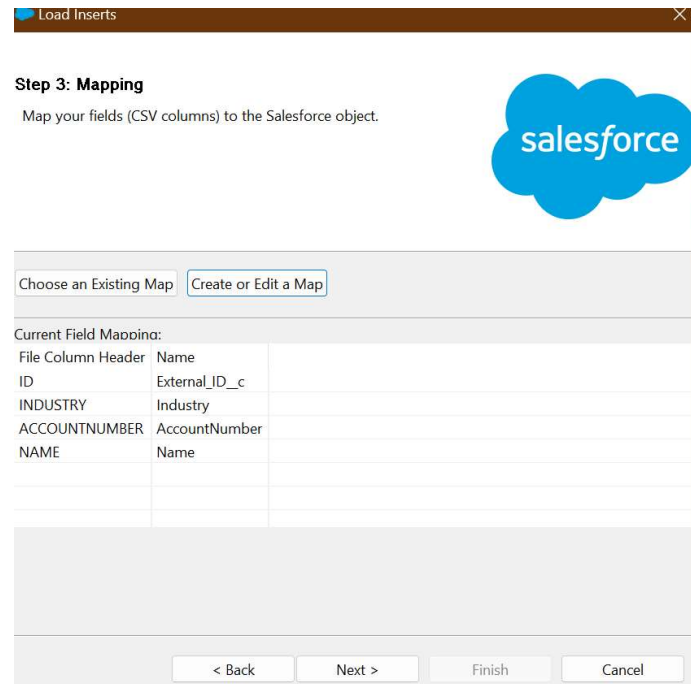
Sesión 04

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		001IY000002aheSYAQ		V
24		001IY000002ahdeYAA		W

Asignamos External_ID al ID



Load Inserts

Step 3: Mapping
Map your fields (CSV columns) to the Salesforce object.

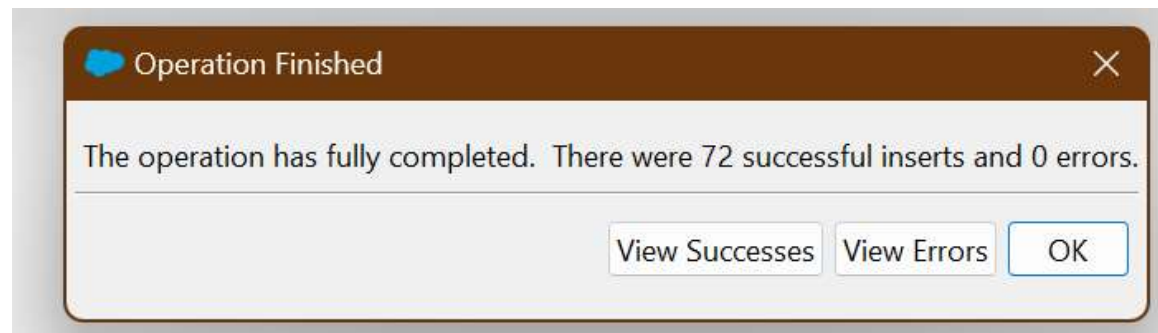
Choose an Existing Map

Current Field Mapping:

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

< Back Next > Finish Cancel

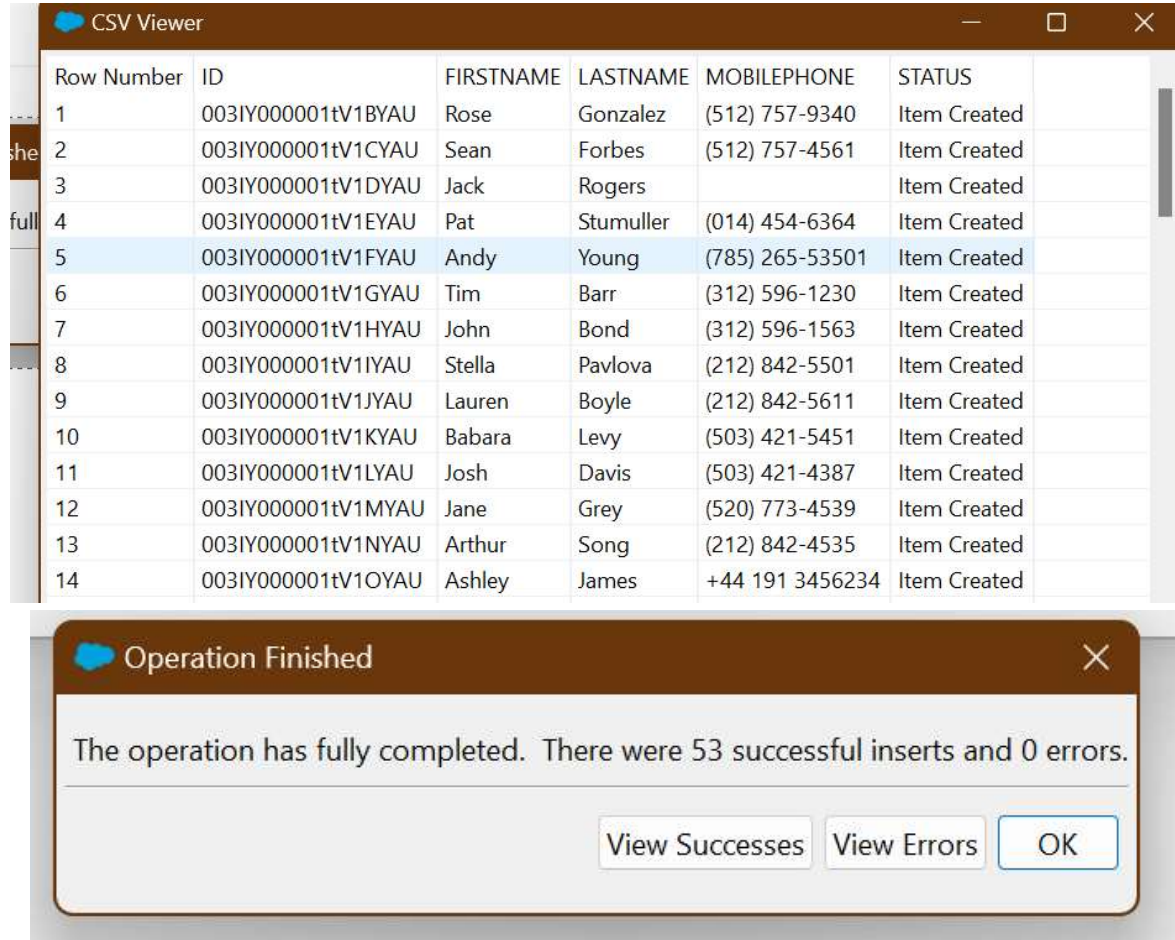
Sin errores



Operation Finished

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

Importando contactos



The image shows two overlapping windows from a software application. The top window, titled 'CSV Viewer', displays a table of contact data. The bottom window, titled 'Operation Finished', shows a confirmation message about the import process.

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

Contact

s

Fields & Relationships

Layouts

Managing Record Pages

Buttons, Links, and Actions

Contact Layouts

Sets

Field Limits

Contact

New Custom Field

Help for this Page ?

Step 3. Enter formula

Step 3 of 5

Previous

Next

Cancel

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: Full Name = LastName & ", " & FirstName [More Examples...](#)

Simple Formula

Advanced Formula

Insert Field

Insert Operator ▼

External_ID (Text) =

Account.External_ID__c

Functions

-- All Function Categories -- ▼

ABS

ADDMONTHS

Quick Tips

- Getting Started
- Operators & Functions

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

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	a05IY000000G3aEYAS	descripcion 7	rtyb245	a05IY000000G3aEYAS	objeto 7	Item Created
8	a05IY000000G3aFYAS	descripcion 8	e5rtyb4526	a05IY000000G3aFYAS	objeto 8	Item Created
9	a05IY000000G3aGYAS	descripcion 9	23456b1234b	a05IY000000G3aGYAS	objeto 9	Item Created
10	a05IY000000G3aHYAS	descripcion 10	2345b1234b	a05IY000000G3aHYAS	objeto 10	Item Created
11	a05IY000000G3aIYAS	descripcion 11	2345b1234b5	a05IY000000G3aIYAS	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	rtynwet	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

The screenshot displays two windows from a software application. The top window, titled 'Operation Finished', contains a message: 'The operation has fully completed. There were 29 successful inserts and 0 errors.' It features three buttons: 'View Successes' (highlighted with a blue border), 'View Errors', and 'OK'.

The bottom window, titled 'CSV Viewer', displays a table with 14 rows of data. The columns are 'Row Number', 'ID', 'EXTERNAL_ID_C', 'NAME', and 'STATUS'. The data represents 14 price books, each with a unique ID and a status of 'Item Created'. Below the table, a message states: 'To open the CSV in the associated external program such as Microsoft Excel, click the button below.' There are two buttons at the bottom: 'Open in external program' and 'Close' (highlighted with a blue border).

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	a07IY0000008rvIY AQ	34v6b7	PriceBook8	Item Created
9	a07IY0000008rvJY AQ	456b78	PriceBook9	Item Created
10	a07IY0000008rvKY AQ	567n89	PriceBook10	Item Created
11	a07IY0000008rvLY AQ	67n89	PriceBook11	Item Created
12	a07IY0000008rvMY AQ	456b78	PriceBook12	Item Created
13	a07IY0000008rvNY AQ	2345v7	PriceBook13	Item Created
14	a07IY0000008rvOY AQ	2v345	PriceBook14	Item Created

PriceBookEntry

The image shows two screenshots from a software application. The top screenshot is a window titled "CSV Viewer" displaying a table with 18 rows of data. The columns are "Row Number", "ID", "EXTERNAL_ID_C", "NAME", and "STATUS". The data shows 18 "PriceBook" entries, each with a unique ID and a status of "Item Created". Below the table, there is a message: "To open the CSV in the associated external program such as Microsoft Excel, click the button below." and two buttons: "Open in external program" and "Close". The bottom screenshot is a dialog box titled "Operation Finished" with a close button (X). It contains the text: "The operation has fully completed. There were 29 successful inserts and 0 errors." At the bottom of the dialog are three buttons: "View Successes", "View Errors", and "OK".

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](#)

Operation Finished

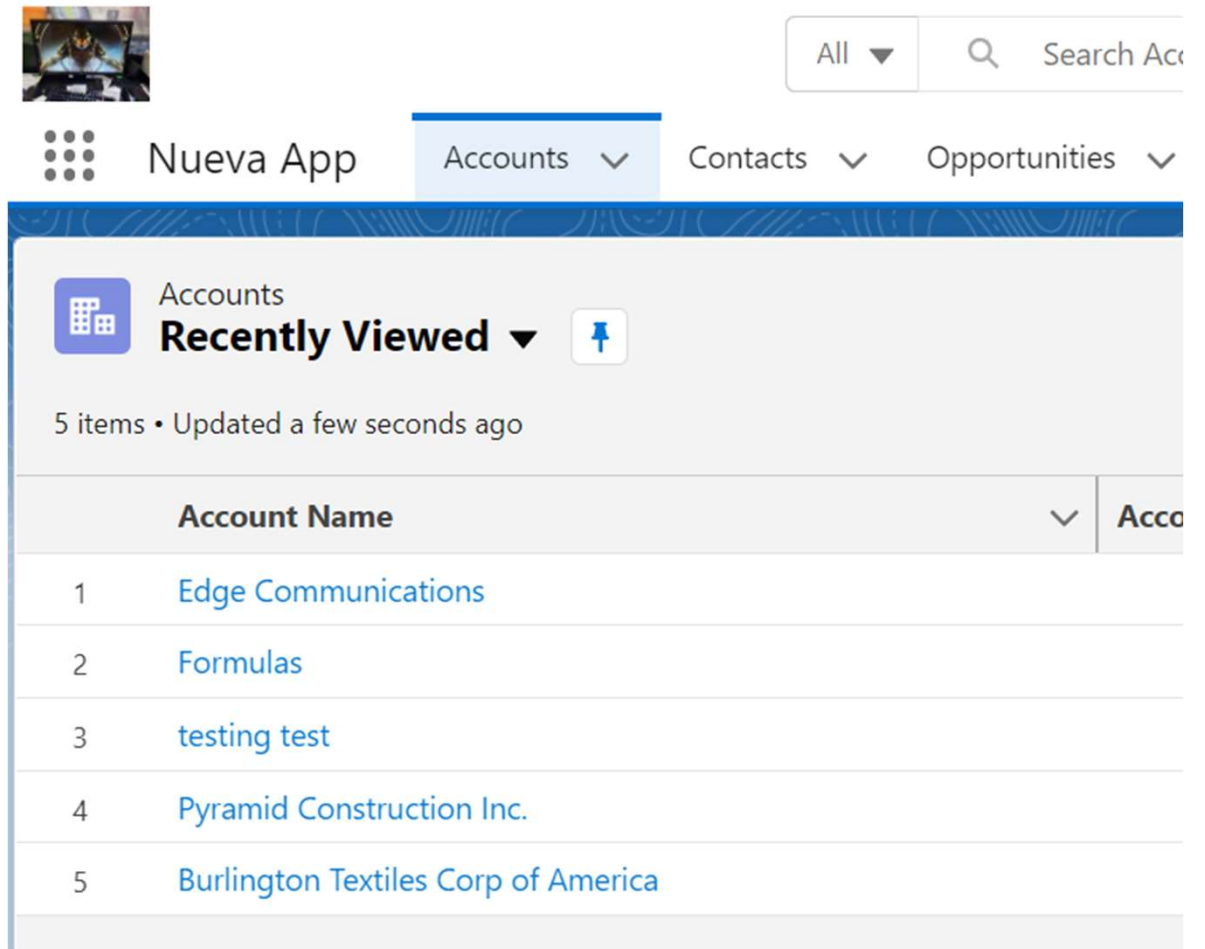
The operation has fully completed. There were 29 successful inserts and 0 errors.

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

Sesión 05

Lightning experience

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



The image shows a Salesforce user interface. At the top, there is a navigation bar with a user profile picture, a search bar labeled 'Search Accounts', and a menu with options: 'Nueva App', 'Accounts' (selected), 'Contacts', and 'Opportunities'. Below the navigation bar, the 'Accounts' section is displayed. It features a 'Recently Viewed' header with a dropdown arrow and a pin icon. Below the header, it indicates '5 items • Updated a few seconds ago'. A table lists the recently viewed accounts:

	Account Name		Account
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 SIC Code

External ID SIC Description

Additional Information

Customer Priority SLA

SLA Expiration Date SLA Serial Number

Number of Locations Upsell Opportunity

Active

Cancel Save & New Save

Description Information

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

Cancel Save & New Save

Additional Information

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

Opportunity				
s & Relationships Layouts ning Record Pages ns, Links, and Actions	Record Types		<input type="text" value="Quick Find"/>	
	2 Items, Sorted by Record Type Label		New	
	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 value.

Available Values	Selected Values
Prospecting	Qualification
Id. Decision Makers	Needs Analysis
Negotiation/Review	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 Selected remove it from any existing records. Finally, select a default picklist value.

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



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

- Fields
- Relationships**
- Page Layouts
- Creating Record Pages
- Buttons, Links, and Actions
- Record Layouts
- Settings
- Field Limits
- Field Types
- Field Lookup Filters

Step 3. Define the summary calculation

Select Object to Summarize

Master Object	Opportunity
Summarized Object	Opportunity Product ▼

Select Roll-Up Type

<input type="radio"/> COUNT	Field to Aggregate Total Price ▼
<input checked="" type="radio"/> SUM	
<input type="radio"/> MIN	
<input type="radio"/> MAX	

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

s

Fields & Relationships

Layouts

Managing Record Pages

Fields, Links, and Actions

Record Layouts

Record Sets

Field Limits

Field Types

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

Insert Field

Opportunity ▼

-- Insert Merge Field -- ▼

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

- s
- & Relationships
- Layouts
- ning Record Pages
- ns, Links, and Actions
- act Layouts
- Sets
- t Limits
- d Types

Opportunity Validation Rule

[Back to Opportunity Validation Rules](#)

Validation Rule Detail Edit Clone

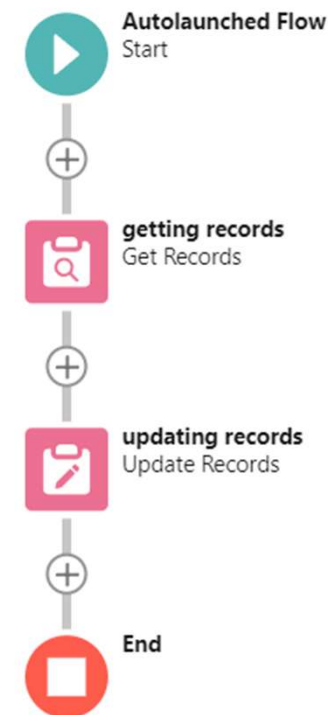
Rule Name	validar_si_closed
Error Condition Formula	OR(ISPICKVAL(PRIORVALUE(StageName), 'Closed Won'), ISPICKVAL(PRIORVALUE(StageName), 'Closed Lost'))
Error Message	ERROR CANNOT CHANGE AFTER CLOSED
Description	
Created By	Edwin Isaac Estrada Rodríguez , 30/05/2022 12:43

Edit Clone

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

PriceBookEntry

Filter PriceBookEntry Records

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


Condition Requirements

None—Get All PriceBookEntry Recor... ▼

Sort PriceBookEntry Records

Sort Order

Not Sorted ▼

 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

Cancel Done

Update records

Edit Update Records

Object

OpportunityLineItem

Filter OpportunityLineItem Records

⚠ With no conditions, the flow updates **all** OpportunityLineItem records.

Condition Requirements to Update Records

None—Update All OpportunityLineI... ▼

Set Field Values for the OpportunityLineItem Records

Field	Value
ListPrice__c	PriceBookEntry from get_price > Unit Price ✕
UnitPrice__c	PriceBookEntry from get_price > Unit Price ✕
ProductCode__c	PriceBookEntry from get_price > ProductCode ✕
OwnerId	PriceBookEntry from get_price > Record ID ✕

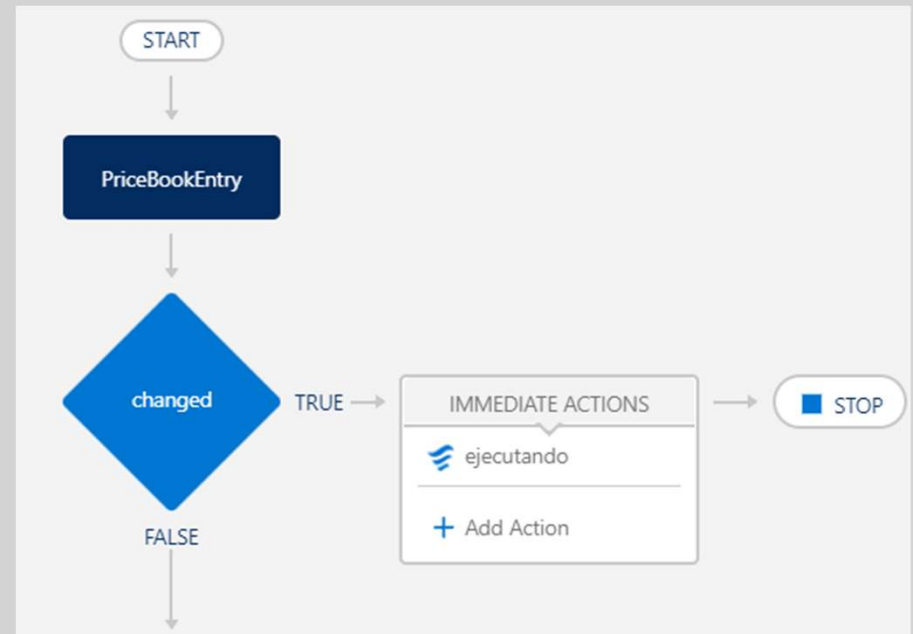
+ Add Field

Cancel

Done

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

Add filter...

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
Last 90 Days


3 Mar 2022 - 31 May 2022 [Customize](#)

[Cancel](#) [Apply](#)

Trimester Opportunities  Oppo

> **Outline**  Filters 1

Groups 

 GROUP ROWS

Opportunity Owner x

Close Date x

Stage x

- 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. ✎ **Opportunities**

Previewing a limited number of records. Run the report

Outline **Filters 1**

Filters ▼

Add filter...

Show Me
All opportunities

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

Opportunity Status
Any

Probability
All

Owner Role ▼ Opportunity Owner ▼

Filter by Close Date ✕

Date
Close Date ▼

Range
Current and Previous CQ ▼

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

[Cancel](#) [Apply](#)

APLAUSOS

APLAUSOS

APLAUSOS

GRACIAS!

APLAUSOS

APLAUSOS

APLAUSOS