

Salesforce

Cheat Sheet

Introduction:

- About Salesforce:** Salesforce is leading Customer Relationship Management (CRM) Software, offers various functionalities to help organisations keep track of their accounts, contacts and opportunities.
- Sales Cloud:** Sales cloud focuses on supporting a sales process, which includes campaigns, leads, accounts and contacts and is used by sales organisations.
- Service Cloud:** Service Cloud also provides functionalities such as entitlements, knowledge bases and case management. Used by support organisations.

Salesforce Objects:

- Standard Objects:** The objects are already created for the user by the Salesforce platform. Also called Account Object.

Standard Objects are: Account, Account History, Case, Contact, User, Asset, Domain.

- Custom Objects:** Objects that are created by user, based on the business processes.
 - Features:**
 - Can build page layouts to control fields, also the read-write access.
 - Can import custom object records.
- External Objects:** The objects which you create map to the data stored outside your organisation.
 - Can create reports and dashboards to analyse custom object data.
 - Can create a custom tab for the custom object.
 - Can track fields and events.
 - Can import custom object records.
- Standard Objects:** The objects are already created for the user by the Salesforce platform. Also called Account Object.

Standard Objects are: Account, Account History, Case, Contact, User, Asset, Domain.

- Custom Objects:** Objects that are created by user, based on the business processes.

- Features:**
 - Can build page layouts to control fields, also the read-write access.
 - Can import custom object records.

Salesforce Relational Tables:

- Salesforce Platform stores data in relational tables.
- These relational tables are also called API Objects.

Automate Business Processes:

- Select an Object to start the process.
- Add criteria to the object to allow the start of the process.
- Add action to the criteria to trigger the execution of the process.

Other Features in Salesforce:

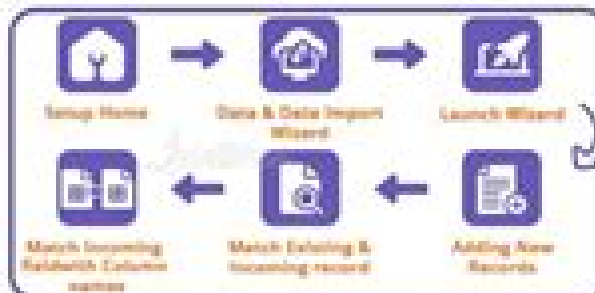
- Sales Collaboration
- Email Integration
- Files Sync Share
- Sales Forecasting
- Territory Management

Dashboards:

- Provides more insights than reports
- Combines data from many reports
- Shows a summarized result.



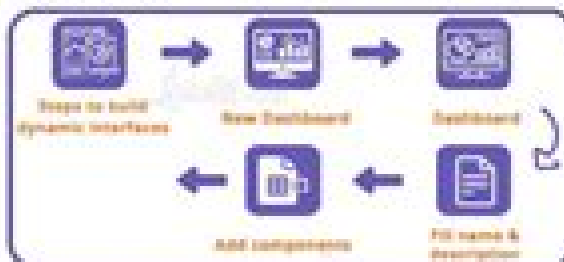
Steps for Importing Data:



Steps for Exporting Data:



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