

# 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.

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#### Features:

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- 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:

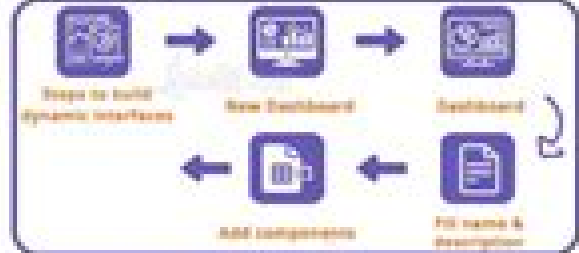
- Sales Collaboration
- Email Integration
- Files Sync Share
- Sales Forecasting
- Territory Management

### Dashboards:

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



### Visualforce:



### Steps to Create Reports:



#### FURTHERMORE:

Salesforce Certification Training  
- Administrator & App Builder



### Steps for Importing Data:



### Steps for Exporting Data:



# Salesforce Cheat Sheet

**Brian Lawley, Pamela Schure**

A red circular graphic with a gradient, appearing as a stylized arrow or a partial circle, located to the right of the authors' names.

## **Salesforce Cheat Sheet:**

## **Salesforce Cheat Sheet** Book Review: Unveiling the Magic of Language

In an electronic digital era where connections and knowledge reign supreme, the enchanting power of language has become apparent than ever. Its power to stir emotions, provoke thought, and instigate transformation is truly remarkable. This extraordinary book, aptly titled "**Salesforce Cheat Sheet**," written by a very acclaimed author, immerses readers in a captivating exploration of the significance of language and its profound effect on our existence. Throughout this critique, we will delve into the book's central themes, evaluate its unique writing style, and assess its overall influence on its readership.

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