

Salesforce

Cheat Sheet

Introduction

- Cloud Solution** - Salesforce is leading Customer Relationship Management (CRM) software, offers various features to help organisations keep track of their accounts, contacts and opportunities.
- Cloud Sales** Sales cloud helps in 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 base 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. **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, and the read-write access.
 - Can import custom object records.

Salesforce Objects Continued...

- 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 tasks 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. **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, and the read-write access.
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Visualforce



Dashboards



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

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.
- Map criteria to the object to allow the start of the process.
- Map action to the criteria to trigger the execution of the process.

Other Features in Salesforce

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

Steps to Create Reports



Steps for Exporting Data



Steps for Importing Data



Salesforce User Guide

L Darling-Hammond



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Table of Contents Salesforce User Guide

1. Understanding the eBook Salesforce User Guide
 - The Rise of Digital Reading Salesforce User Guide
 - Advantages of eBooks Over Traditional Books
2. Identifying Salesforce User Guide
 - Exploring Different Genres
 - Considering Fiction vs. Non-Fiction
 - Determining Your Reading Goals
3. Choosing the Right eBook Platform
 - Popular eBook Platforms
 - Features to Look for in an Salesforce User Guide
 - User-Friendly Interface
4. Exploring eBook Recommendations from Salesforce User Guide
 - Personalized Recommendations
 - Salesforce User Guide User Reviews and Ratings
 - Salesforce User Guide and Bestseller Lists
5. Accessing Salesforce User Guide Free and Paid eBooks
 - Salesforce User Guide Public Domain eBooks
 - Salesforce User Guide eBook Subscription Services
 - Salesforce User Guide Budget-Friendly Options

6. Navigating Salesforce User Guide eBook Formats
 - ePub, PDF, MOBI, and More
 - Salesforce User Guide Compatibility with Devices
 - Salesforce User Guide Enhanced eBook Features
7. Enhancing Your Reading Experience
 - Adjustable Fonts and Text Sizes of Salesforce User Guide
 - Highlighting and Note-Taking Salesforce User Guide
 - Interactive Elements Salesforce User Guide
8. Staying Engaged with Salesforce User Guide
 - Joining Online Reading Communities
 - Participating in Virtual Book Clubs
 - Following Authors and Publishers Salesforce User Guide
9. Balancing eBooks and Physical Books Salesforce User Guide
 - Benefits of a Digital Library
 - Creating a Diverse Reading Collection Salesforce User Guide
10. Overcoming Reading Challenges
 - Dealing with Digital Eye Strain
 - Minimizing Distractions
 - Managing Screen Time
11. Cultivating a Reading Routine Salesforce User Guide
 - Setting Reading Goals Salesforce User Guide
 - Carving Out Dedicated Reading Time
12. Sourcing Reliable Information of Salesforce User Guide
 - Fact-Checking eBook Content of Salesforce User Guide
 - Distinguishing Credible Sources
13. Promoting Lifelong Learning
 - Utilizing eBooks for Skill Development
 - Exploring Educational eBooks
14. Embracing eBook Trends
 - Integration of Multimedia Elements

- Interactive and Gamified eBooks

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