

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:

- 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:

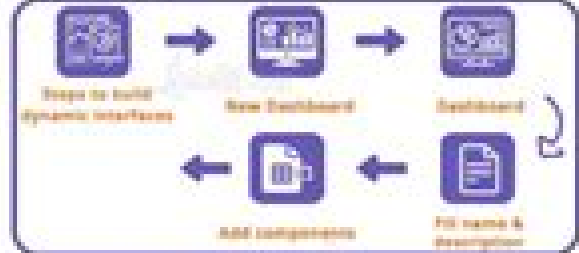
- Sales Collaboration
- Email Integration
- Files Sync Share
- Sales Forecasting
- Territory Management

Dashboards:

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



Visualforce:

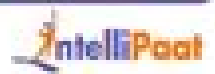


Steps to Create Reports:



FURTHERMORE:

Salesforce Certification Training
- Administrator & App Builder



Steps for Importing Data:



Steps for Exporting Data:



Salesforce Cheat Sheet

Hussin A.Rothana

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

Salesforce Cheat Sheet:

Salesforce Cheat Sheet: Bestsellers in 2023 The year 2023 has witnessed a noteworthy surge in literary brilliance, with numerous engrossing novels captivating the hearts of readers worldwide. Lets delve into the realm of top-selling books, exploring the fascinating narratives that have enthralled audiences this year. Salesforce Cheat Sheet : Colleen Hoover "It Ends with Us" This touching tale of love, loss, and resilience has captivated readers with its raw and emotional exploration of domestic abuse. Hoover skillfully weaves a story of hope and healing, reminding us that even in the darkest of times, the human spirit can prevail. Salesforce Cheat Sheet : Taylor Jenkins Reids "The Seven Husbands of Evelyn Hugo" This intriguing historical fiction novel unravels the life of Evelyn Hugo, a Hollywood icon who defies expectations and societal norms to pursue her dreams. Reids absorbing storytelling and compelling characters transport readers to a bygone era, immersing them in a world of glamour, ambition, and self-discovery. Discover the Magic : Delia Owens "Where the Crawdads Sing" This mesmerizing coming-of-age story follows Kya Clark, a young woman who grows up alone in the marshes of North Carolina. Owens spins a tale of resilience, survival, and the transformative power of nature, captivating readers with its evocative prose and mesmerizing setting. These popular novels represent just a fraction of the literary treasures that have emerged in 2023. Whether you seek tales of romance, adventure, or personal growth, the world of literature offers an abundance of compelling stories waiting to be discovered. The novel begins with Richard Papen, a bright but troubled young man, arriving at Hampden College. Richard is immediately drawn to the group of students who call themselves the Classics Club. The club is led by Henry Winter, a brilliant and charismatic young man. Henry is obsessed with Greek mythology and philosophy, and he quickly draws Richard into his world. The other members of the Classics Club are equally as fascinating. Bunny Corcoran is a wealthy and spoiled young man who is always looking for a good time. Charles Tavis is a quiet and reserved young man who is deeply in love with Henry. Camilla Macaulay is a beautiful and intelligent young woman who is drawn to the power and danger of the Classics Club. The students are all deeply in love with Morrow, and they are willing to do anything to please him. Morrow is a complex and mysterious figure, and he seems to be manipulating the students for his own purposes. As the students become more involved with Morrow, they begin to commit increasingly dangerous acts. The Secret History is a masterful and suspenseful novel that will keep you wondering until the very end. The novel is a warning tale about the dangers of obsession and the power of evil.

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