Salesforce Cheat Sheet

Introduction:

- About Editorace: Salesfonie is leading Customer Baladisnohip.
 Wanagement (CRM) Software, offers verious functionalities to help organizations being track of their accounts, contacts and appartmenters.
- Sales Cloud: Sales should flacuses on supporting a sales process, which includes campaigns, leads, accounts and contacts and is used by sales organizations.
- Service Cloud: Service Cloud also provides functionalities such as antitioments, knowledge bases also save management. Used by support organizations.

Salesforce Objects:

 Transfer Objects. The objects are already created for the user by the Salesforts pletform. Area called Account Object.

Standard Olivico are Account, Account Natory, Case, Comart, User Asset Domain.

- Europe Objects that are crossed by user, based on the business processes.
 - 1 December 1
 - Can build page layouts to control fields, also the read-write access.
 - Can import ruscom object records.
- External Column: The objects which you create map to the data stored outside your organization.
 - . Can create reports and distribution to analyse commit stone date.
 - Care unsuits is consistent took from the constant integers.
 - o Care track ducks and assess.
 - o Care Impact question unlaid records.
- Borisland Organia. The objects are already created for the user by the Satesfance platform, Alos called Account Object.

Dismitter & Disjection ariest Account, Accounts History, Case, Contact, User, Asset, Domain

 Content Dignote Objects that are created by user, based on the business processes.

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- Can build page leyouts to control fluids, also the read arms econo.
- · Can Import quature elgact incombs.

Salesforce Relational Tables:

- Salesforce Histories occurs data in relational telling.
- These relational tables are also called API Objects.

Automate Business Processes:

- . Select an Object to yeart 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
- timali integration.
- Files Sanc 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:



Visualforce:



Steps to Create Reports:



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Michal Rosen-Zvi

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