

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.

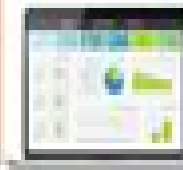
Salesforce Objects Continued...

- 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.
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 - Can import custom object records.

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

**MicroStrategy Product
Manuals, MicroStrategy**



Salesforce User Guide:

Salesforce Christopher Matthew Spencer, 2018-05 Increase customers and their satisfaction while growing your business with the world's #1 customer relationship management CRM software This 6 page laminated guide breaks down options for data and resource transition data migration and essential tools and their function Written by our sales and Salesforce guru and Lynda.com author Christopher Matthew Spencer this well rounded primer to this powerful tool will show you the ropes and get you up and running with a proven roadmap to customer satisfaction and success 6 page laminated guide includes Intro to Salesforce CRM Salesforce Clouds Salesforce CRM Editions Planning Transition Data Migration Initial Setup Permission Sets Profiles Users Groups Queues Roles Organization Wide Default Sharing Settings Data Sharing Overview Health Check Tips for Data Importing Using Salesforce Objects Apps Lightning Pages Page Layouts Tabs Files A Typical Salesforce Team's Workflow Reports Dashboards

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transformative impact on sales and customer support operations Master opportunity management for successful deal closures and pipeline forecasting Understand Salesforce Orgs managing users settings and customization Explore data import and export methods and data mapping Discover best practices mock tests and valuable tips and tricks to prepare for Salesforce certification Who this book is for This book is for aspiring Salesforce administrators and consultants looking to build a solid foundation in Salesforce products system setup and customization as well as advance their careers within the Salesforce ecosystem It s also a great resource for those preparing to take the Salesforce ADM 201 certification exam as it serves as an excellent supplement to the existing learning materials

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MicroStrategy Analytics Express User Guide MicroStrategy Product Manuals, MicroStrategy,2013-10-31 The Express User Guide provides instructions to get started with MicroStrategy Express It includes an introduction to dashboard analysis creation sharing and management as well as creating and managing users and teams

Salesforce CRM - The Definitive Admin Handbook Paul Goodey,2019-04-27 A definitive guide covering all

the core concepts necessary to pass the Salesforce Administrator Certification exam Key Features Understand critical design considerations for setting up Salesforce CRM Facilitate and manage the transition from Salesforce Classic to Lightning Experience Learn key functions of application security to manage user profiles and data Book Description Salesforce's winter 19 release offers a host of new features for CRM designed to meet your sales and marketing requirements With this comprehensive guide to implementing Salesforce CRM administrators of all levels can easily get a thorough understanding of the platform This Salesforce handbook begins by guiding you in setting up users and security and then progresses to configuration data management and data analytics You'll discover process automation and approval mechanisms while also exploring the functional areas of Sales Cloud Service Cloud Marketing Cloud and Salesforce Chatter This book covers Salesforce CRM system administration in a practical way and it'll serve as an invaluable reference for both new administrators and experienced professionals Furthermore you'll also delve into Salesforce mobile apps and mobile administration along with Salesforce Adoption Manager You'll gain insights into Lightning Experience Salesforce's new app and learn how its modern design and sleek interface helps you to build customizable components Finally we'll see how the two versions compare and help manage the transition from Salesforce Classic to Lightning Experience By the end of the book you will have mastered the techniques to configure and control various user interface features in Salesforce CRM What you will learn Configure a variety of user interface features in Salesforce CRM Understand the capabilities of the Salesforce CRM sharing model Explore Einstein Analytics Salesforce's new wave of advanced reporting Get to grips with the Lightning Process Builder workflow Set up user profiles security and login access mechanisms Find out how Apex and Visualforce coding can be used in Salesforce CRM Manage the transition from Salesforce Classic to Lightning Experience Implement data manipulation features to apply best practices in data management Who this book is for This book is for administrators who want to develop and strengthen their Salesforce CRM skills in the areas of configuration and system management Whether you are a new or experienced professional this book will enhance your knowledge and understanding of Salesforce CRM features [System Administration Guide for MicroStrategy 9.5](#) MicroStrategy Product

Manuals, MicroStrategy, 2015-02-01 The System Administration Guide describes the concepts and high level steps to implement deploy maintain tune and troubleshoot a MicroStrategy business intelligence system *Microsoft Copilot: The Complete User Guide* Riley P. Vance, 2025-07-19 Discover the Smarter Way to Work with Microsoft Copilot Are you ready to take full advantage of Microsoft 365's most powerful AI feature Copilot This complete Microsoft Copilot user guide will help you unlock smarter faster workflows across Word Excel PowerPoint Outlook and Teams Whether you're a beginner or a seasoned Microsoft Office user this book shows you how to integrate AI productivity tools for workplace efficiency and real world results Designed for Professionals Educators Content Creators Business Users Inside this practical Microsoft Copilot book for professionals you'll learn how to Use Copilot for Word Excel PowerPoint to create edit and refine your work Build

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Learning Force.com Application Development Chamil Madusanka,2015-04-27 If you are a developer who wants to learn how to develop and deploy applications from the Salesforce com platform then this book is for you No prior knowledge of Salesforce is necessary

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Product Manuals, MicroStrategy, 2011-12-20 Installation and Configuration Guide for MicroStrategy 10 MicroStrategy Product Manuals, 2015-06-04 *Transformative Marketing* V. Kumar, Philip Kotler, 2024-06-21 This book gives an indispensable guide to navigating the shift in customer behavior and discovers how to rally their resources cultivate capabilities and forge strategies that harness cutting edge technologies In today's tech centric world customers crave lightning fast digital experiences and demand instant solutions In response firms are changing the way they do business by accelerating the application of new age technologies revamping processes building new organizational structures and innovating new business models The authors unveil the secrets of integrating diverse data sources principles of Marketing 5.0 and employing advanced techniques to unearth profound insights about the customers This work is the ticket to the latest in AI machine learning drones and other game changing technologies Stay ahead of the curve by learning not just what tech to use but how when and why to deploy it in this digital age For the trailblazers with the influence and resources to reshape marketing strategies this book is the essential read Executives climbing the corporate ladder will find it a compass unraveling how new age technologies dance with both traditional and emerging marketing practices And for MBA students hungry for insights on navigating the digital era's competitive landscape this book is the treasure trove of tools and real world cases Dive in and chart the course in the tech driven marketing landscape

The book delves into Salesforce User Guide. Salesforce User Guide is a vital topic that must be grasped by everyone, from students and scholars to the general public. This book will furnish comprehensive and in-depth insights into Salesforce User Guide, encompassing both the fundamentals and more intricate discussions.

1. The book is structured into several chapters, namely:

- Chapter 1: Introduction to Salesforce User Guide
- Chapter 2: Essential Elements of Salesforce User Guide
- Chapter 3: Salesforce User Guide in Everyday Life
- Chapter 4: Salesforce User Guide in Specific Contexts
- Chapter 5: Conclusion

2. In chapter 1, the author will provide an overview of Salesforce User Guide. The first chapter will explore what Salesforce User Guide is, why Salesforce User Guide is vital, and how to effectively learn about Salesforce User Guide.

3. In chapter 2, this book will delve into the foundational concepts of Salesforce User Guide. The second chapter will elucidate the essential principles that need to be understood to grasp Salesforce User Guide in its entirety.

4. In chapter 3, this book will examine the practical applications of Salesforce User Guide in daily life. The third chapter will showcase real-world examples of how Salesforce User Guide can be effectively utilized in everyday scenarios.

5. In chapter 4, this book will scrutinize the relevance of Salesforce User Guide in specific contexts. This chapter will explore how Salesforce User Guide is applied in specialized fields, such as education, business, and technology.

6. In chapter 5, the author will draw a conclusion about Salesforce User Guide. The final chapter will summarize the key points that have been discussed throughout the book.

The book is crafted in an easy-to-understand language and is complemented by engaging illustrations. This book is highly recommended for anyone seeking to gain a comprehensive understanding of Salesforce User Guide.

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