

Salesforce

Cheat Sheet

Introduction

- Cloud Software** - 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.

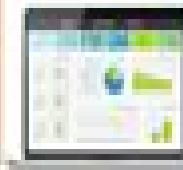
Salesforce Objects Continued...

- 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.
 - 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

SB Merriam



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