

# 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** - Cloud for sales 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, case management, identify 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, also 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.
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- Custom Objects** - Objects that are created by user, based on the business processes.
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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

**David Baud**



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