

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.



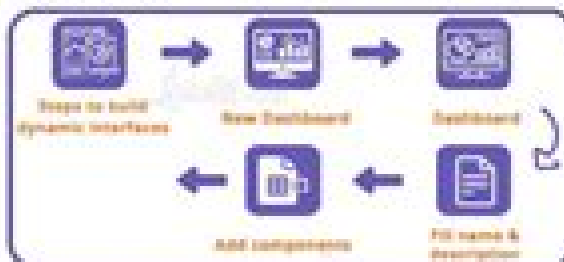
Steps for Importing Data:



Steps for Exporting Data:



Visualforce:



Steps to Create Reports:



FURTHERMORE:

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Salesforce Cheat Sheet

KJ Lindholm-Leary



Salesforce Cheat Sheet:

Enjoying the Melody of Term: An Emotional Symphony within **Salesforce Cheat Sheet**

In a global used by screens and the ceaseless chatter of fast interaction, the melodic beauty and mental symphony produced by the written term usually fade into the back ground, eclipsed by the constant sound and interruptions that permeate our lives. However, nestled within the pages of **Salesforce Cheat Sheet** a wonderful fictional value brimming with raw thoughts, lies an immersive symphony waiting to be embraced. Constructed by an outstanding composer of language, this captivating masterpiece conducts visitors on a mental journey, skillfully unraveling the concealed melodies and profound affect resonating within each carefully constructed phrase. Within the depths of the touching assessment, we can discover the book is key harmonies, analyze their enthralling publishing style, and submit ourselves to the profound resonance that echoes in the depths of readers souls.

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