

# 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.
- 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.
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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

**V. Kumar, Philip Kotler**



## **Salesforce User Guide:**

## Whispering the Techniques of Language: An Mental Journey through **Salesforce User Guide**

In a digitally-driven world where monitors reign supreme and instant interaction drowns out the subtleties of language, the profound secrets and emotional subtleties hidden within words frequently get unheard. However, set within the pages of **Salesforce User Guide** a captivating fictional prize sporting with natural thoughts, lies a fantastic journey waiting to be undertaken. Composed by an experienced wordsmith, this marvelous opus invites viewers on an introspective trip, delicately unraveling the veiled truths and profound affect resonating within ab muscles cloth of each word. Within the emotional depths with this moving review, we can embark upon a heartfelt exploration of the book is core subjects, dissect their fascinating publishing style, and yield to the effective resonance it evokes heavy within the recesses of readers hearts.

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