

# 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:** 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.

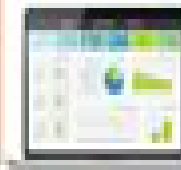
### Salesforce Objects Continued...

- 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:** 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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### 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

**Minjie Lin**



## **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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*Salesforce CRM Administration Handbook* Krzysztof Nowacki, Mateusz Twarożek, 2024-04-30 Master the core concepts of Salesforce administration and gain a holistic understanding of the SF ecosystem that will also help you prepare for the Salesforce certification exam Key Features Understand Salesforce architecture and security model Integrate Flow Builder with other Salesforce components for seamless automation Understand how to create and manage approval workflows in Salesforce Purchase of the print or Kindle book includes a free PDF eBook Book Description Do you aspire to be a successful Salesforce administrator or consultant If yes then this step by step guide is for you Written by certified Salesforce professionals the Salesforce CRM Administration Handbook will take you through the intricacies of Salesforce covering objects records automation and much more while also prepping you for the Salesforce certification exam Starting with an overview of the capabilities and limitations of Salesforce you'll progress toward a holistic understanding of system architecture with real world examples including workarounds that enable the successful completion of projects As you delve deeper you'll learn about the fundamental concepts of a CRM system its purpose and the pivotal role of an administrator in the Salesforce lifecycle You'll also explore the basic structures of the entire Salesforce system and navigate confidently through the intricacies of security automation and reporting in the Sales Service Cloud By the end of this book you'll have the confidence you need to navigate Salesforce's backend seamlessly implement configuration changes effortlessly and communicate fluently in Salesforce terminology What you will learn Discover strategies to stay up to date with Salesforce releases Integrate Salesforce products seamlessly to meet diverse business needs Explore Sales and Service Cloud and its

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

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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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