

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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- 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 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.



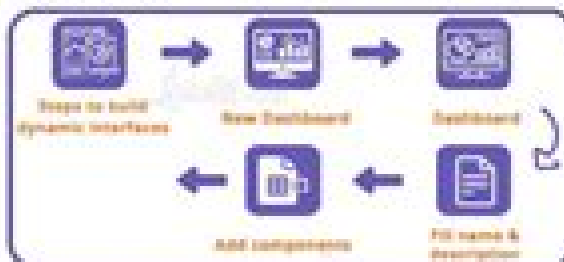
Steps for Importing Data:



Steps for Exporting Data:



Visualforce:



Steps to Create Reports:



FURTHERMORE:

Salesforce Certification Training
- Administrator & App Builder



Salesforce Cheat Sheet

Léo Pomar

A red circular graphic with a gradient, appearing as a stylized arrow or a partial circle, located to the right of the author's name.

Salesforce Cheat Sheet:

Unveiling the Power of Verbal Beauty: An Emotional Sojourn through **Salesforce Cheat Sheet**

In some sort of inundated with displays and the cacophony of fast connection, the profound energy and mental resonance of verbal artistry usually fade into obscurity, eclipsed by the regular barrage of sound and distractions. Yet, nestled within the musical pages of **Salesforce Cheat Sheet**, a captivating work of literary beauty that pulses with raw feelings, lies an wonderful journey waiting to be embarked upon. Penned with a virtuoso wordsmith, that mesmerizing opus guides visitors on a mental odyssey, lightly exposing the latent potential and profound impact stuck within the complicated internet of language. Within the heart-wrenching expanse of the evocative analysis, we can embark upon an introspective exploration of the book is central subjects, dissect their fascinating publishing fashion, and immerse ourselves in the indelible effect it leaves upon the depths of readers souls.

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