

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.
- 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.

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.



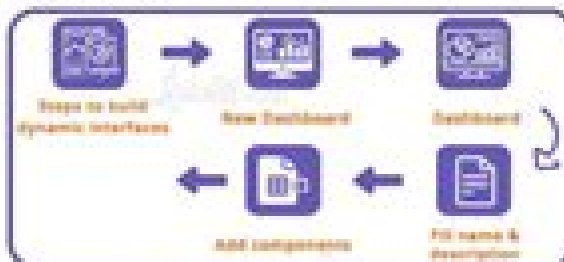
Steps for Importing Data:



Steps for Exporting Data:



Visualforce:



Steps to Create Reports:



FURTHERMORE:

Salesforce Certification Training
- Administrator & App Builder



Salesforce Cheat Sheet

Liz Kao, Jon Paz



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Table of Contents Salesforce Cheat Sheet

1. Understanding the eBook Salesforce Cheat Sheet
 - The Rise of Digital Reading Salesforce Cheat Sheet
 - Advantages of eBooks Over Traditional Books
2. Identifying Salesforce Cheat Sheet
 - Exploring Different Genres
 - Considering Fiction vs. Non-Fiction
 - Determining Your Reading Goals
3. Choosing the Right eBook Platform
 - Popular eBook Platforms
 - Features to Look for in an Salesforce Cheat Sheet
 - User-Friendly Interface
4. Exploring eBook Recommendations from Salesforce Cheat Sheet
 - Personalized Recommendations
 - Salesforce Cheat Sheet User Reviews and Ratings
 - Salesforce Cheat Sheet and Bestseller Lists
5. Accessing Salesforce Cheat Sheet Free and Paid eBooks
 - Salesforce Cheat Sheet Public Domain eBooks
 - Salesforce Cheat Sheet eBook Subscription Services

- Salesforce Cheat Sheet Budget-Friendly Options
- 6. Navigating Salesforce Cheat Sheet eBook Formats
 - ePub, PDF, MOBI, and More
 - Salesforce Cheat Sheet Compatibility with Devices
 - Salesforce Cheat Sheet Enhanced eBook Features
- 7. Enhancing Your Reading Experience
 - Adjustable Fonts and Text Sizes of Salesforce Cheat Sheet
 - Highlighting and Note-Taking Salesforce Cheat Sheet
 - Interactive Elements Salesforce Cheat Sheet
- 8. Staying Engaged with Salesforce Cheat Sheet
 - Joining Online Reading Communities
 - Participating in Virtual Book Clubs
 - Following Authors and Publishers Salesforce Cheat Sheet
- 9. Balancing eBooks and Physical Books Salesforce Cheat Sheet
 - Benefits of a Digital Library
 - Creating a Diverse Reading Collection Salesforce Cheat Sheet
- 10. Overcoming Reading Challenges
 - Dealing with Digital Eye Strain
 - Minimizing Distractions
 - Managing Screen Time
- 11. Cultivating a Reading Routine Salesforce Cheat Sheet
 - Setting Reading Goals Salesforce Cheat Sheet
 - Carving Out Dedicated Reading Time
- 12. Sourcing Reliable Information of Salesforce Cheat Sheet
 - Fact-Checking eBook Content of Salesforce Cheat Sheet
 - Distinguishing Credible Sources
- 13. Promoting Lifelong Learning
 - Utilizing eBooks for Skill Development
 - Exploring Educational eBooks
- 14. Embracing eBook Trends

- Integration of Multimedia Elements
- Interactive and Gamified eBooks

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