

Salesforce

Cheat Sheet

Introduction

- Cloud Solution** - 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** 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, and the read-write access.
 - Can import custom object records.

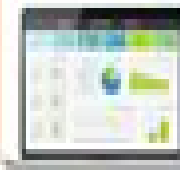
Salesforce Objects Continued...

- 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** 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, and the read-write access.
 - Can import custom object records.

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

Siddappa N.Byrareddy



Salesforce User Guide:

Salesforce User Guide Book Review: Unveiling the Magic of Language

In an electronic digital era where connections and knowledge reign supreme, the enchanting power of language has become apparent than ever. Its ability to stir emotions, provoke thought, and instigate transformation is truly remarkable. This extraordinary book, aptly titled "**Salesforce User Guide**," compiled by a very acclaimed author, immerses readers in a captivating exploration of the significance of language and its profound impact on our existence. Throughout this critique, we shall delve to the book's central themes, evaluate its unique writing style, and assess its overall influence on its readership.

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