

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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Features:

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- 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:

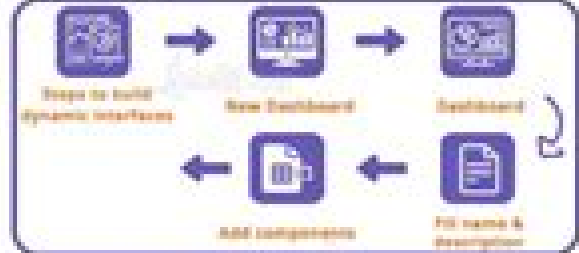
- Sales Collaboration
- Email Integration
- Files Sync Share
- Sales Forecasting
- Territory Management

Dashboards:

- Provides more insights than reports
- Combines data from many reports
- Shows a summarized result.



Visualforce:



Steps to Create Reports:



FURTHERMORE:

Salesforce Certification Training
- Administrator & App Builder



Steps for Importing Data:



Steps for Exporting Data:



Salesforce Cheat Sheet

Mike Jess

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:

Enjoying the Track of Phrase: An Psychological Symphony within **Salesforce Cheat Sheet**

In a global eaten by displays and the ceaseless chatter of fast communication, the melodic beauty and psychological symphony developed by the prepared word often disappear in to the backdrop, eclipsed by the constant noise and disturbances that permeate our lives. However, set within the pages of **Salesforce Cheat Sheet** an enchanting fictional treasure overflowing with raw feelings, lies an immersive symphony waiting to be embraced. Crafted by a wonderful composer of language, this charming masterpiece conducts visitors on a mental journey, well unraveling the concealed tunes and profound influence resonating within each carefully constructed phrase. Within the depths of the emotional assessment, we shall explore the book is key harmonies, analyze their enthralling publishing model, and surrender ourselves to the profound resonance that echoes in the depths of readers souls.

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