

# Salesforce

## Cheat Sheet

### Introduction:

- **About Salesforce:** Salesforce is leading Customer Relationship Management (CRM) Software, offers various functionalities to help organizations 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 organizations.
- **Service Cloud:** Service Cloud also provides functionalities such as entitlements, knowledge bases also case management. Used by support organizations.

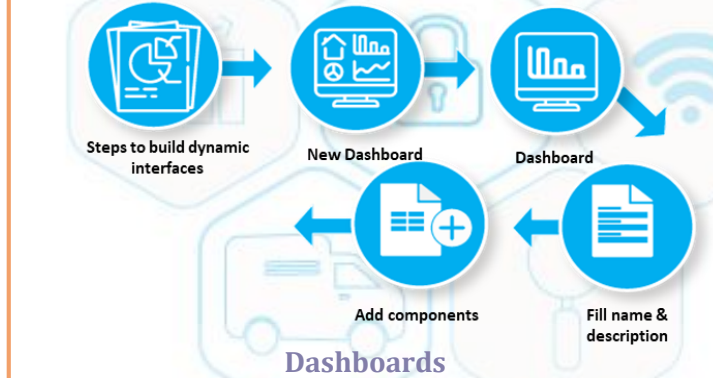
### Salesforce Objects:

- **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.

### Salesforce Objects Continued...

- **External Objects:** The objects which you create map to the data stored outside your organization.
  - Can create reports and dashboards to analyze custom object data.
  - Can create a custom tab for the custom object.
  - Can track tasks and events.
  - Can import custom object records.
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### Visualforce



### Dashboards



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

### Salesforce Relational Tables:

- Salesforce Platform stores data in relational tables.
- These relational tables are also called API Objects.

### Other Features in Salesforce

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

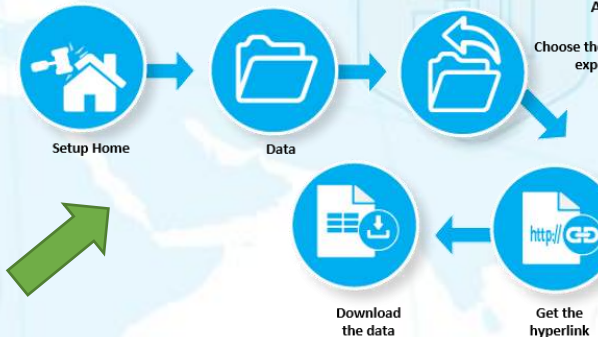
### Automate Business Processes

- 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.

### Steps to Create Reports



### Steps for Exporting Data



### Steps for Importing Data

