# 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 Accounts Objects.

- **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 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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    - 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.
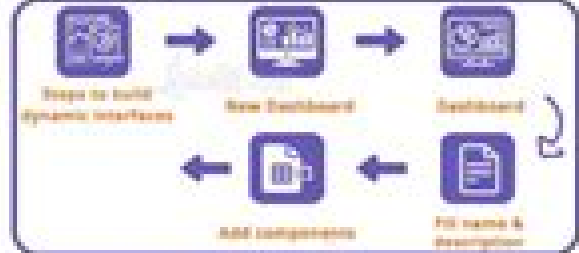
## Other Features in Salesforce:

- 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:



Setup Home → Data & Data Import Wizard → Launch Wizard → Adding New Records → Match Existing & Incoming record → Match Incoming field with Column names

## Steps for Exporting Data:



Setup Home → Data → ... → Get the hyperlink → Download the data

## Visualforce:



Steps to build dynamic interfaces → New Dashboard → Dashboard → Fill name & description → Add components

## Steps to Create Reports:



Reports → Create New Report → Select Object (s) → Define settings → Choose the created filter & save report → Apply the filter

**FURTHERMORE:**

Salesforce Certification Training – Administrator & App Builder

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**Srini Munagavalasa**

**Salesforce Cheat Sheet:**

 **Salesforce For Dummies** Liz Kao,Jon Paz,2024-04-02 Your easy to follow guide to the world s leading cloud based CRM software Salesforce gives your business an edge in tracking relationships and managing sales marketing customer service and support operations Salesforce For Dummies help you take advantage of key platform functionality and focus on making the most of its many features Learn best practices to determine the right configuration to suit your business needs and how to use apps build widgets and configure features to personalize your system for your business Explore prospecting for leads managing accounts maintaining contacts tracking products calculating forecasts and monitoring each customer s service and support interactions with your business Collaborate with colleagues by sharing information across a 360 degree view of all customer interactions enhance your online marketing gain real time visibility into sales and close deals faster Get started with configuring Salesforce and set up the apps that your business needs Discover the latest updates to Salesforce including Flow Builder Lightning and Einstein Improve business performance with reporting insights collaborative communication features and integrated sales and marketing processes Find new ways to improve productivity and reduce administration time Salesforce For Dummies is the fully updated best selling guide that helps new and existing users get up to speed with the world s top CRM      Salesforce.com For Dummies Liz Kao,Jon Paz,2016-04-25 Your all access guide to reaping the benefits of Salesforce com Salesforce com has a rapidly expanding influence over the way companies across the globe interact with their clientele Written by Salesforce com insiders with years of experience in customer relationship management CRM solutions Salesforce com For Dummies gives you an edge in building relationships and managing your company s sales marketing customer service and support operations You ll discover how to organize contacts schedule business appointments use forecasting tools to predict upcoming sales create accurate projects based on past performance and so much more A customizable on demand CRM solution Salesforce com allows businesses to organize and manage all of their customer information leads opportunities contacts accounts cases and solutions in one place Whether you re a Windows or Mac user this down to earth friendly guide shows you how to maximize Salesforce com s capabilities to close deals faster gain real time visibility into sales and collaborate instantly Customize the new user interface with apps widgets and tools Prospect leads drive sales and provide outstanding customer service Manage contacts identify opportunities and analyze your results Collaborate with colleagues using Chatter If you re new to Salesforce com or an existing user looking for the latest tips and tricks to maximize its potential this friendly guide has you covered      *Salesforce Marketing Cloud For Dummies* Chester Bullock,Mark Pollard,2017-10-30 Salesforce Marketing Cloud Take your digital marketing on a journey Everything seems to be moving to the cloud these days and digital marketing is no exception Salesforce Marketing Cloud For Dummies guides you through the use of Salesforce s exciting suite of cloud based digital marketing solutions which have the power to help you plan personalize and optimize your customers journey Written by a leader of the Salesforce training and

development team Salesforce Marketing Cloud users will find essential information on using the suite of tools and tips and tricks that only an insider would be able to share With easy to follow instructions this guide helps you discover how to incorporate your data sets into the tools to create models campaigns and customer maps that enable you to create a positive experience for your customers As Salesforce com s multi channel digital marketing platform the Salesforce Marketing Cloud focuses on helping you manage one on one customer journeys Leveraging a variety of features this suite of tools offers email marketing mobile marketing social media marketing content and messaging predictive intelligence and more Your ability to navigate these features and functions will determine your digital marketing campaign s success so it s critical that you make the most of this tool Navigate and manage the Salesforce Marketing Cloud Define and understand your customers journeys and how you fit into them Engage your customers across devices ensuring consistent communication Use predictive data to optimize engagement Salesforce Marketing Cloud For Dummies helps you make the most of your investment in the digital marketing world     **Learning Salesforce Einstein** Mohith Shrivastava,2017-06-28 Incorporate the power of Einstein in your Salesforce application About This Book Make better predictions of your business processes using prediction and predictive modeling Build your own custom models by leveraging PredictionIO on the Heroku platform Integrate Einstein into various cloud services to predict sales marketing leads insights into news feeds and more Who This Book Is For This book is for developers data scientists and Salesforce experienced consultants who want to explore Salesforce Einstein and its current offerings It assumes some prior experience with the Salesforce platform What You Will Learn Get introduced to AI and its role in CRM and cloud applications Understand how Einstein works for the sales service marketing community and commerce clouds Gain a deep understanding of how to use Einstein for the analytics cloud Build predictive apps on Heroku using PredictionIO and work with Einstein Predictive Vision Services Incorporate Einstein in the IoT cloud Test the accuracy of Einstein through Salesforce reporting and Wave analytics In Detail Dreamforce 16 brought forth the latest addition to the Salesforce platform an AI tool named Einstein Einstein promises to provide users of all Salesforce applications with a powerful platform to help them gain deep insights into the data they work on This book will introduce you to Einstein and help you integrate it into your respective business applications based on the Salesforce platform We start off with an introduction to AI then move on to look at how AI can make your CRM and apps smarter Next we discuss various out of the box components added to sales service marketing and community clouds from salesforce to add Artificial Intelligence capabilities Further on we teach you how to use Heroku PredictionIO and the force com platform along with Einstein to build smarter apps The core chapters focus on developer content and introduce PredictionIO and Salesforce Einstein Vision Services We explore Einstein Predictive Vision Services along with analytics cloud the Einstein Data Discovery product and IOT core concepts Throughout the book we also focus on how Einstein can be integrated into CRM and various clouds such as sales services marketing and communities By the end of the book you will be able to embrace and leverage the power of

Einstein incorporating its functions to gain more knowledge Salesforce developers will be introduced to the world of AI while data scientists will gain insights into Salesforce s various cloud offerings and how they can use Einstein s capabilities and enhance applications Style and approach This book takes a straightforward approach to explain Salesforce Einstein and all of its potential applications Filled with examples the book presents the facts along with seasoned advice and real world use cases to ensure you have all the resources you need to incorporate the power of Einstein in your work **Salesforce.com Secrets of Success** David Taber,2013 New Tools and Best Practices for Driving More Sales and Profits with Salesforce com From Chatter to the Service Cloud Salesforce com now offers unprecedented opportunities to supercharge business performance But most SFDC customers won t achieve that potential Salesforce com R Secrets of Success Second Edition is the one guide that will help you transform these opportunities into profit Drawing on his personal experience with more than a hundred deployments David Taber guides you through every aspect of Salesforce com planning implementation and management Building on a first edition that earned rave reviews Taber focuses on the most valuable innovations in Salesforce com s most recent releases Reflecting all that s been learned about making Salesforce com work Taber offers results focused best practices for sales marketing customer service finance legal IT and beyond You ll find indispensable new insights into accelerating user adoption achieving stronger operational results and overcoming today s key obstacles to maximizing the value of Salesforce com New coverage in this revised edition includes Using the Service Cloud to cut costs accelerate time to revenue improve agility and maximize customer lifetime value Leveraging tablets and smartphones to build your CRM strategy Identifying prospects and delighting customers through Salesforce com s Social CRM capabilities Promoting more effective internal and external collaboration with Chatter Identifying best practices for going all Cloud and managing the attendant risks Establishing realistic hard and soft metrics for everything from productivity and profitability to social CRM performance Discovering today s most valuable third party AppExchange products Together with its companion website SFDC secrets com this new edition offers updated questionnaires worksheets templates checklists and other resources for every executive team member developer and stakeholder **The Salesforce Business Analyst Handbook** Srini Munagavalasa,2022-11-18 Become a proficient Salesforce business analyst with the help of expert recommendations techniques best practices and practical advice Purchase of the print or Kindle book includes a free eBook in the PDF format Key Features Learn the intricacies and nuances of every stage of a project s implementation Discover real world examples tips and tricks that you can apply to any Salesforce project Overcome the challenges inherent in user interaction and improve your customer experience Book DescriptionSalesforce business analysis skills are in high demand and there are scant resources to satisfy this demand This practical guide for business analysts contains all the tools techniques and processes needed to create business value and improve user adoption The Salesforce Business Analyst Handbook begins with the most crucial element of any business analysis activity identifying business requirements You ll learn how to use tacit business

analysis and Salesforce system analysis skills to rank and stack all requirements as well as get buy in from stakeholders Once you understand the requirements you ll work on transforming them into working software via prototyping mockups and wireframing But what good is a product if the customer cannot use it To help you achieve that this book will discuss various testing strategies and show you how to tailor testing scenarios that align with business requirements documents Toward the end you ll find out how to create easy to use training material for your customers and focus on post production support one of the most critical phases Your customers will stay with you if you support them when they need it By the end of this Salesforce book you ll be able to successfully navigate every phase of a project and confidently apply your new knowledge in your own Salesforce implementations What you will learn Create a roadmap to deliver a set of high level requirements Prioritize requirements according to their business value Identify opportunities for improvement in process flows Communicate your solution design via conference room pilots Construct a requirements traceability matrix Conduct user acceptance tests and system integration tests Develop training artifacts so your customers can easily use your system Implement a post production support model to retain your customers Who this book is forThis book is for intermediate to senior level business analysts with a basic understanding of Salesforce CRM software or any CRM technology who want to learn proven business analysis techniques to set their business up for success **Salesforce.com For Dummies** Tom Wong,Liz Kao,Matt Kaufman,2014-04-09 Your fun and easy introduction to Salesforce com and its latest tools The frontrunner in the customer relationship management CRM market Salesforce com has a rapidly expanding influence over the way companies across the globe interact with their clientele Salesforce com For Dummies lends you an edge in building those relationships and managing your company s sales marketing customer service and support operations With this accessible guide you will learn how to organize contacts schedule business appointments use forecasting tools to predict upcoming sales make accurate projects based on past performance and more Covers the latest enhancements to Salesforce com the world s most popular customer relationship management software and explains how to choose the right configuration to suit your business needs Written by Salesforce com insiders with years of expertise in CRM services Details how to personalize your system prospect leads manage accounts and partners develop contacts track products calculate forecasts drive demand utilize service and support share insights with Chatter enhance your online marketing and more Close deals faster gain real time visibility into sales and collaborate instantly with help from Salesforce com For Dummies *Force.com Enterprise Architecture* Andrew Fawcett,2014-09-25 This book is for advanced Force com developers and architects who need to understand the Salesforce platform from the perspective of enterprise level requirements You should have an existing understanding of Apex and Visualforce Those familiar with other enterprise software ecosystems will also find this book ideal as they adopt Force com *Salesforce Service Cloud For Dummies* Jon Paz,T. J. Kelley,2015-04-15 Learn how to provide top grade customer service anywhere anytime with Salesforce Service Cloud Salesforce Service Cloud empowers your service organization to interact

with customers through any channel and provide an individualized experience that will be worth sharing for your customers and for your company Salesforce Service Cloud For Dummies is one the first books to focus specifically on Salesforce Service Cloud software With it you ll discover how to set up a sophisticated support center for your business in a matter of a few hours Whether you re a service executive manager support agent or system administrator you will discover how to maximize usage of Service Cloud through best practices and step by step guidelines This book will help your customer service departments gain a holistic view of the customers they serve and provide your customers with meaningful efficient interactions Examines how to enable your agents to provide efficient service Discusses how to interact with customers through any channel Offers insights on improving internal communication and collaboration Shows how to resolve customer s questions in a timely manner Take advantage of this opportunity to be heard above your competition with the help of Salesforce Service Cloud For Dummies      Developing Data Migrations and Integrations with Salesforce David Masri,2018-12-18 Migrate your data to Salesforce and build low maintenance and high performing data integrations to get the most out of Salesforce and make it a go to place for all your organization s customer information When companies choose to roll out Salesforce users expect it to be the place to find any and all Information related to a customer the coveted Client 360 view On the day you go live users expect to see all their accounts contacts and historical data in the system They also expect that data entered in other systems will be exposed in Salesforce automatically and in a timely manner This book shows you how to migrate all your legacy data to Salesforce and then design integrations to your organization s mission critical systems As the Salesforce platform grows more powerful it also grows in complexity Whether you are migrating data to Salesforce or integrating with Salesforce it is important to understand how these complexities need to be reflected in your design Developing Data Migrations and Integrations with Salesforce covers everything you need to know to migrate your data to Salesforce the right way and how to design low maintenance high performing data integrations with Salesforce This book is written by a practicing Salesforce integration architect with dozens of Salesforce projects under his belt The patterns and practices covered in this book are the results of the lessons learned during those projects What You ll Learn Know how Salesforce s data engine is architected and why Use the Salesforce Data APIs to load and extract data Plan and execute your data migration to Salesforce Design low maintenance high performing data integrations with Salesforce Understand common data integration patterns and the pros and cons of each Know real time integration options for Salesforce Be aware of common pitfalls Build reusable transformation code covering commonly needed Salesforce transformation patterns Who This Book Is For Those tasked with migrating data to Salesforce or building ongoing data integrations with Salesforce regardless of the ETL tool or middleware chosen project sponsors or managers nervous about data tracks putting their projects at risk aspiring Salesforce integration and or migration specialists Salesforce developers or architects looking to expand their skills and take on new challenges      **Professional Heroku Programming** Chris Kemp,Brad Gyger,2013-01-22 A complete guide

to building and deploying web apps with Heroku A cloud application platform Heroku is currently the only approved platform for creating apps within Facebook and its number of users is growing at rapid pace However there are very few books on the market that offer professional level coverage of this platform until now The author duo begins with an introduction to the Heroku platform and its associated core concepts and then goes on to explain how writing for this platform differs from that of traditional development systems Example applications additional resources and advice for your next steps round out this resource making it a thorough indispensable guide Features information not found anywhere else as both authors work for Heroku Explains the inner workings of Heroku with special emphasis placed on building web and mobile applications Introduces GIT based development workflow and the process model within the Heroku platform Details coding building deploying and scaling effectively using the Heroku tool base Providing you with fully functional code and downloadable code examples Professional Heroku Programming is your complete guide to mastering this platform **Architecture Modernization** Nick Tune,Jean-Georges Perrin,2024-02-20 The decisions you make about your software are inherently connected to the decisions you make about your business Why not turn the mundane task of modernizing legacy systems into a transformative process for your entire company This book shows you how It reveals a socio technical approach to align your software and products with organizational dynamics and ways of working Architecture modernization socio technical alignment of software strategy and structure presents a clear path of upgrading your entire organization when you re imagine your software In it you ll learn to combine practices like Domain Driven Design Event Storming and Wardley Mapping to discover user needs design optimal architecture and avoid falling back into old habits Provocative examples from Danske Salesforce the UK Government and others show the real world result of each approach identifying techniques you can apply effectively in your own business *Salesforce Platform App Builder Certification Guide* Paul Goodey,2020-11-13 Get up to speed with the essential concepts and techniques necessary to prepare for the Salesforce Platform App Builder certification exam Key FeaturesPrepare for the Salesforce Platform App Builder certification exam by exploring important concepts and expert tips and techniquesDesign the data model user interface business logic and security for custom appsUnderstand the key milestones and considerations when managing an application lifecycleBook Description Do you want to be able to confidently design and build apps that support business processes within the Lightning Platform Salesforce Platform App Builder Certification Guide not only helps you to do this but also prepares you for the certification exam The book starts by describing the core capabilities of the Lightning Platform You ll learn techniques for data modeling to design build and deploy apps without writing code and achieve rapid results with the declarative capabilities that the Lightning Platform provides Next you ll explore utilities for importing and exporting data and the features available in the Lightning Platform to restrict and extend access to objects fields and records You ll also be able to customize the Salesforce Lightning Experience user interface UI and build functionality for custom buttons links and actions Later this certification study guide

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with access to external services following new coverage of OpenAPI enabled API servicesBook Description Salesforce makes architecting enterprise grade applications easy and secure but you ll need guidance to leverage its full capabilities and deliver top notch products for your customers This fourth edition brings practical guidance to the table taking you on a journey through building and shipping enterprise grade apps This guide will teach you advanced application architectural design patterns such as separation of concerns unit testing and dependency injection You ll also get to grips with Apex and fflib create scalable services with Java Node js and other languages using Salesforce Functions and Heroku and find new ways to test Lightning UIs These key topics alongside a new chapter on exploring asynchronous processing features are unique to this edition You ll also benefit from an extensive case study based on how the Salesforce Platform delivers solutions By the end of this Salesforce book whether you are looking to publish the next amazing application on AppExchange or build packaged applications for your organization you will be prepared with the latest innovations on the platform What you will learnCreate and deploy packaged apps for your own business or for AppExchangeUnderstand Enterprise Application Architecture patternsCustomize the mobile and desktop user experience with Lightning Web ComponentsManage large data volumes with asynchronous processing and big data strategiesLearn how to go beyond the Apex language and utilize Java and Node js to scale your skills and code with Heroku and Salesforce FunctionsTest and optimize Salesforce Lightning UIsUse Connected Apps External Services and Objects along with AWS integration tools to access off platform code and data with your applicationWho this book is for If you are a Salesforce developer who wants to unlock the true potential of the Salesforce platform and deliver complex scalable applications within your company or for use in large enterprises you target through AppExchange then you have come to the right place You will need a solid foundation of Salesforce development to dive into this book it is here to elevate your skills not teach you the basics    *Salesforce Platform App Builder Certification Handbook* Siddhesh Kabe,2016-04-26 A handy guide that covers the most essential topics for Salesforce Platform App Builder Certification in an easy to understand format About This Book Get to grips with the fundamentals of Force com to pass the certification exam with flying colors Create Force com applications automate business processes and manage data operations to be a successful Salesforce com Certified Force com app builder A step by step guide that covers the most essential topics for the Platform App Builder Certification in an easy to understand format Who This Book Is For Salesforce beginners who need to prepare for the Salesforce Platform App Builder Certification exam will benefit from this book This book is ideal for developers and admins who are new to Salesforce CRM and the Force com platform It is recommended that users have some basic programming knowledge and are familiar with salesforce By the end of the book you will be ready to appear for the exam and develop various applications on the cloud platform What You Will Learn Learn the basics of the force com cloud platform Learn to build objects that align with your business Understand the process of building an application on force com platform Kick start your certification journey in basic easy to follow guide Focus on important topics that help you

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appropriate enterprise integration interfaces to build your connected solution Understand the essential concepts of identity and access management Develop scalable Salesforce data and system architecture Design the project environment and release strategy for your solution Articulate the benefits limitations and design considerations relating to your solution Discover tips tricks and strategies to prepare for the Salesforce CTA review board exam Who this book is for This book is for Salesforce architects who want to become certified technical architects by learning how to design secure and scalable technical solutions for their organizations A solid understanding of the Salesforce platform is required ideally combined with 3 to 5 years of practical experience as an application architect system architect enterprise architect or solution architect

*Product Management For Dummies* Brian Lawley,Pamela Schure,2017-01-24 Your one stop guide to becoming a product management prodigy Product management plays a pivotal role in organizations In fact it s now considered the fourth most important title in corporate America yet only a tiny fraction of product managers have been trained for this vital position If you re one of the hundreds of thousands of people who hold this essential job or simply aspire to break into a new role Product Management For Dummies gives you the tools to increase your skill level and manage products like a pro From defining what product management is and isn t to exploring the rising importance of product management in the corporate world this friendly and accessible guide quickly gets you up to speed on everything it takes to thrive in this growing field It offers plain English explanations of the product life cycle market research competitive analysis market and pricing strategy product roadmaps the people skills it takes to effectively influence and negotiate and so much more Create a winning strategy for your product Gather and analyze customer and market feedback Prioritize and convey requirements to engineering teams effectively Maximize revenues and profitability Product managers are responsible for so much more than meets the eye and this friendly authoritative guide lifts the curtain on what it takes to succeed      Social Media Regina Luttrell,2016-08-19 Updated to reflect the latest technological innovations and challenges the second edition of Social Media How to Engage Share and Connect will help readers understand and successfully use today s social media tools Luttrell s text offers a thorough history of social media and pioneers of the field chapters on specific subjects such as photo sharing video crisis communication ethics and sticky social among others discussions on appropriate use of social media in public relations where the profession stands today and where it is headed in the future and real world examples of successful social media campaigns This book will become your go to reference guide for all things social media related as it applies to public relations and the everyday duties of PR professionals

Eventually, you will totally discover a further experience and finishing by spending more cash. yet when? do you say yes that you require to acquire those every needs afterward having significantly cash? Why dont you attempt to acquire something basic in the beginning? Thats something that will guide you to understand even more with reference to the globe, experience, some places, with history, amusement, and a lot more?

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## Salesforce Cheat Sheet Introduction

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