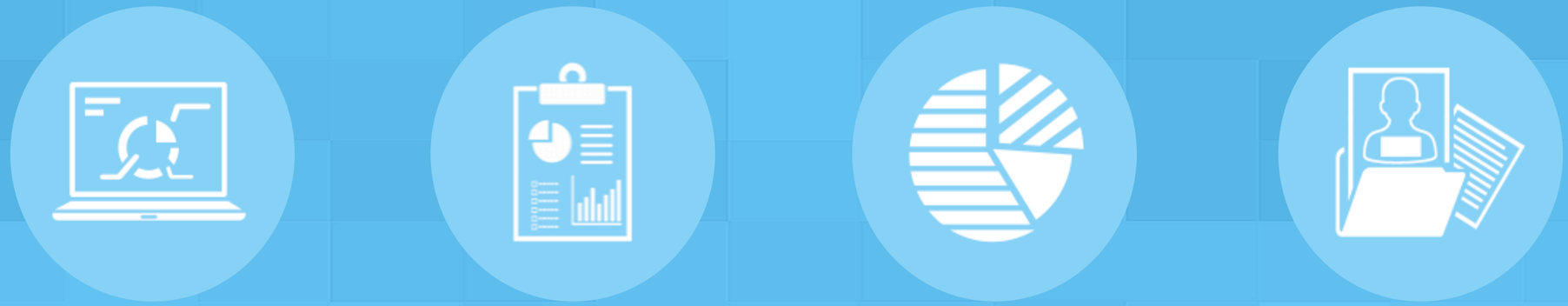
Salesforce Certified Admin and App Builder

Lesson 1—Salesforce Overview



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What You'll Learn

- Customizing the home page by adding and removing components
- Creating custom tabs and app
- Uploading a company logo to brand Salesforce
- Exploring the System Overview page
- Updating the fiscal year and business hours

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Introduction to Salesforce

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Introduction to Salesforce

Salesforce is a web-based CRM that allows users to log in from anywhere with an internet connection and browser.

The common use-cases for Salesforce include:

- Tracking business development activities of salespeople
- Reporting on customer interactions through case management
- Reporting on the effectiveness of marketing initiatives
- Collaborating between employees, partners, and customers

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Salesforce Editions

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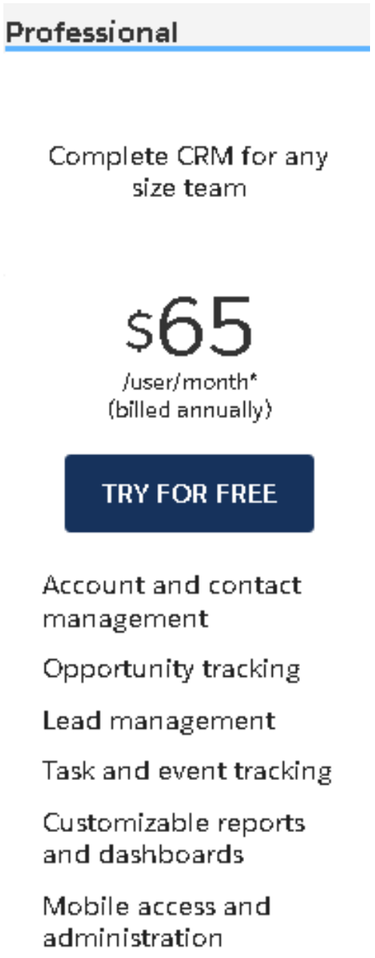
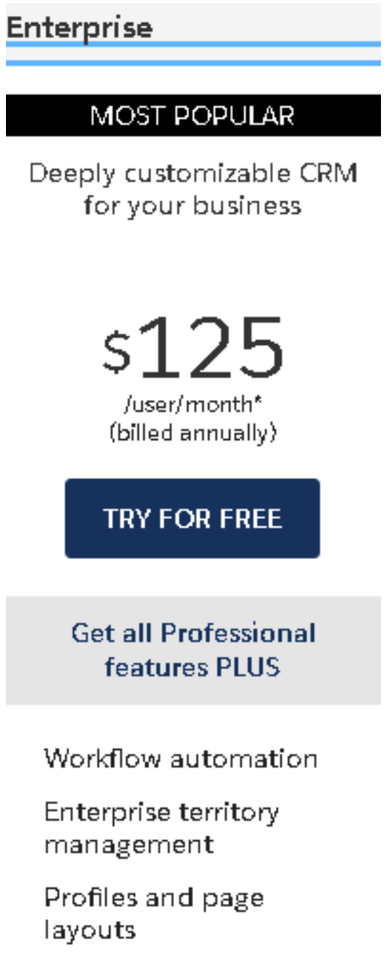
Salesforce Edition

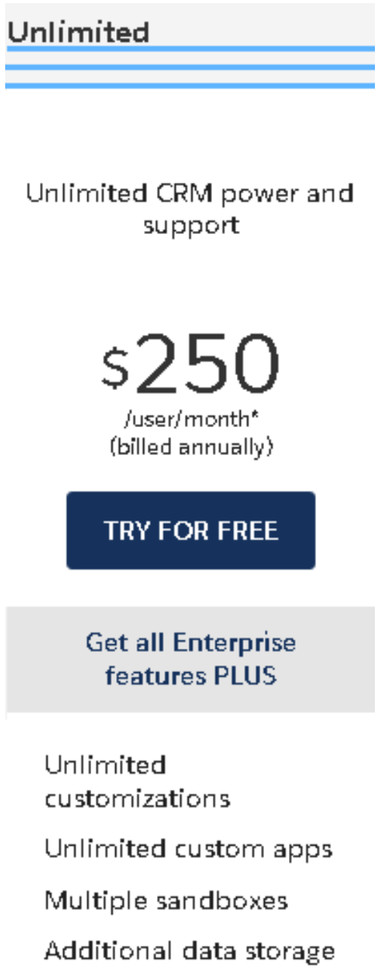
The different editions of Salesforce are:



Professional Edition



Enterprise Edition



Unlimited Edition

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Home Page Customization

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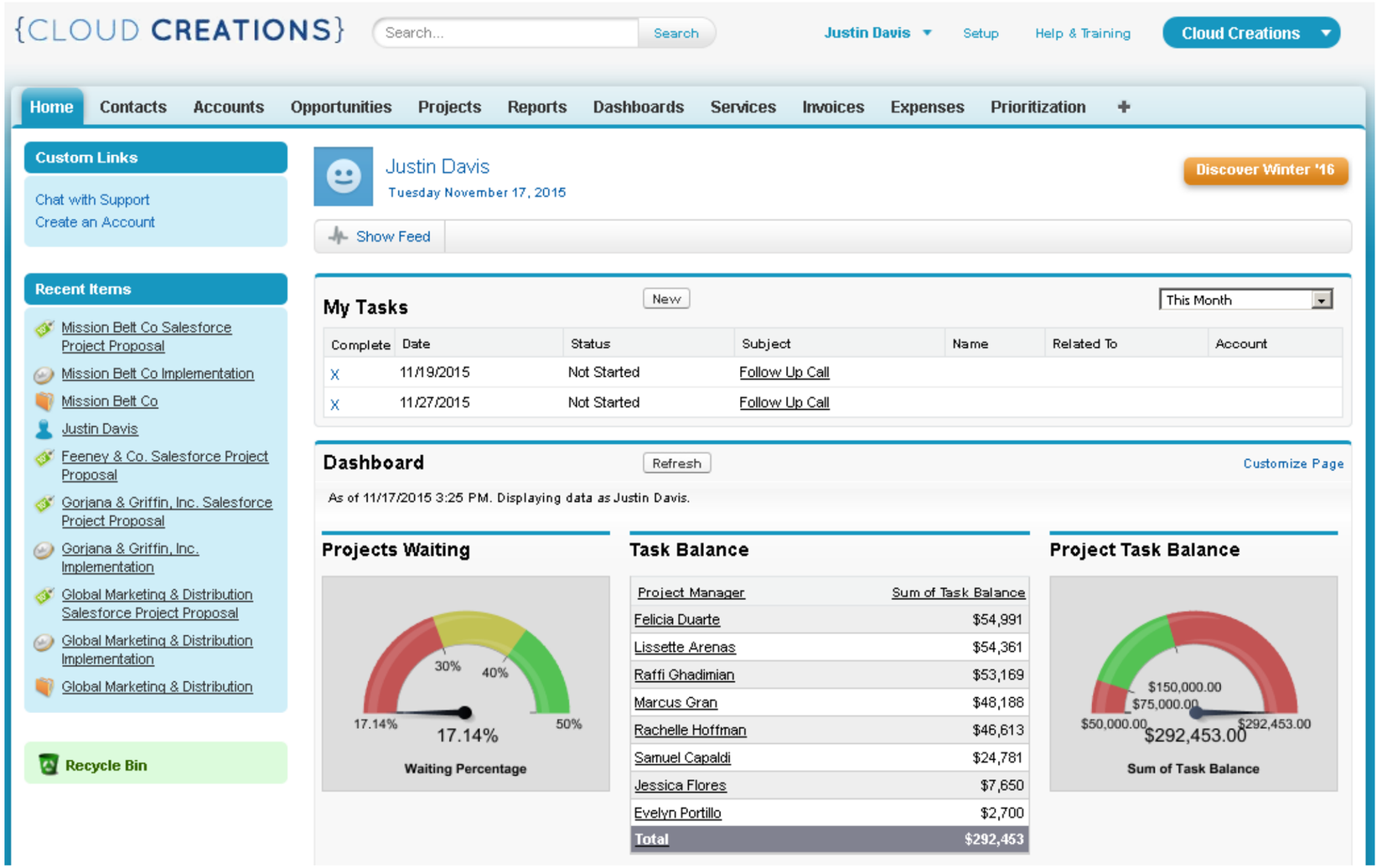
Home Page Features Customization

The different features of the Home Page are as follows:

- It is the starting point for all Salesforce Users.
- This page is used to manage open and incomplete tasks.
- You can view upcoming events from this screen.
- You can also view dashboard snapshots.



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User Management

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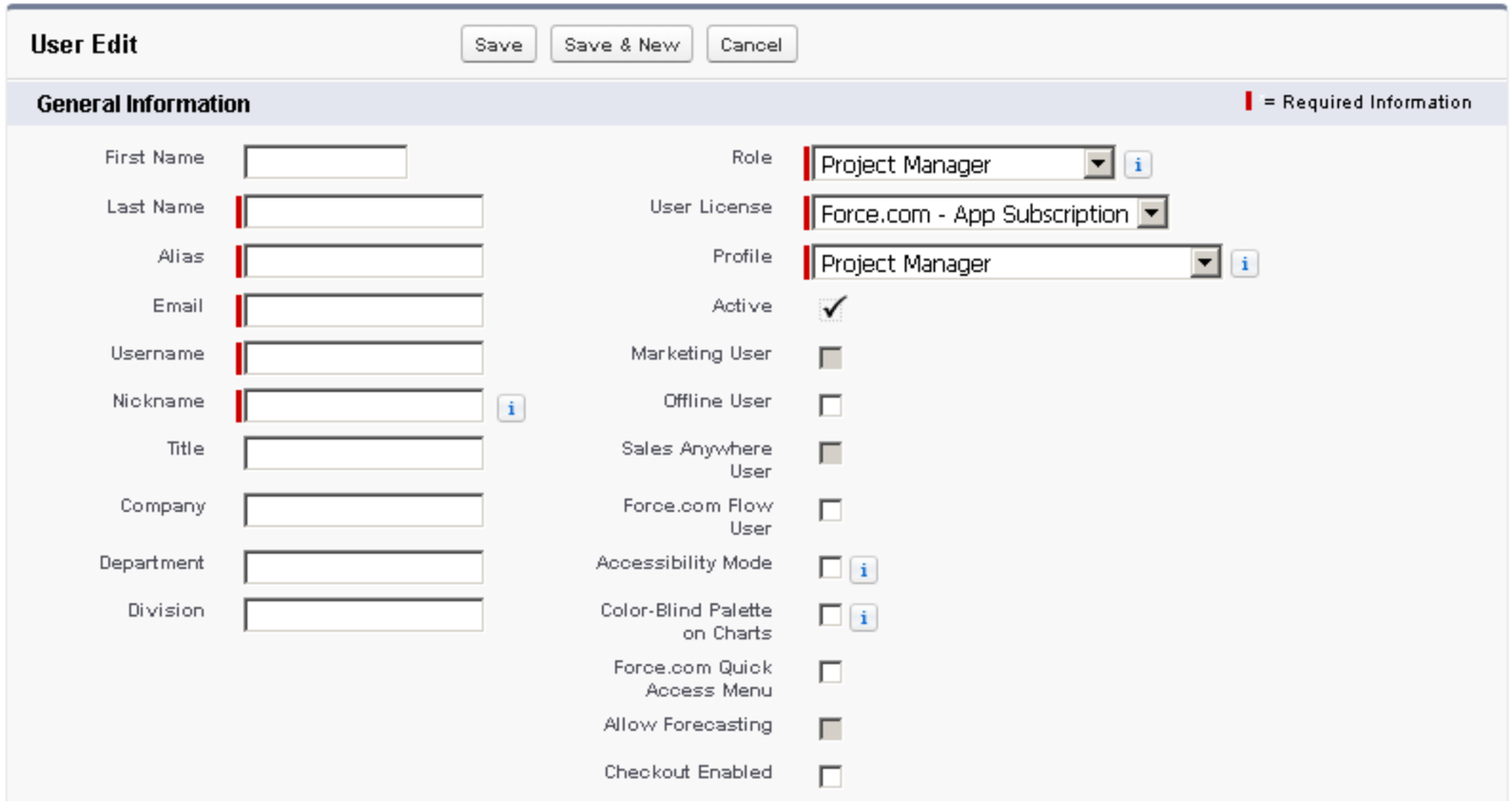
User Management

Following are the key points to remember while managing user:

- Users must be assigned an active license
- Usernames must be unique and in email format
- Users must be assigned a profile
- Reassign user licenses



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Creating and Customizing Tabs

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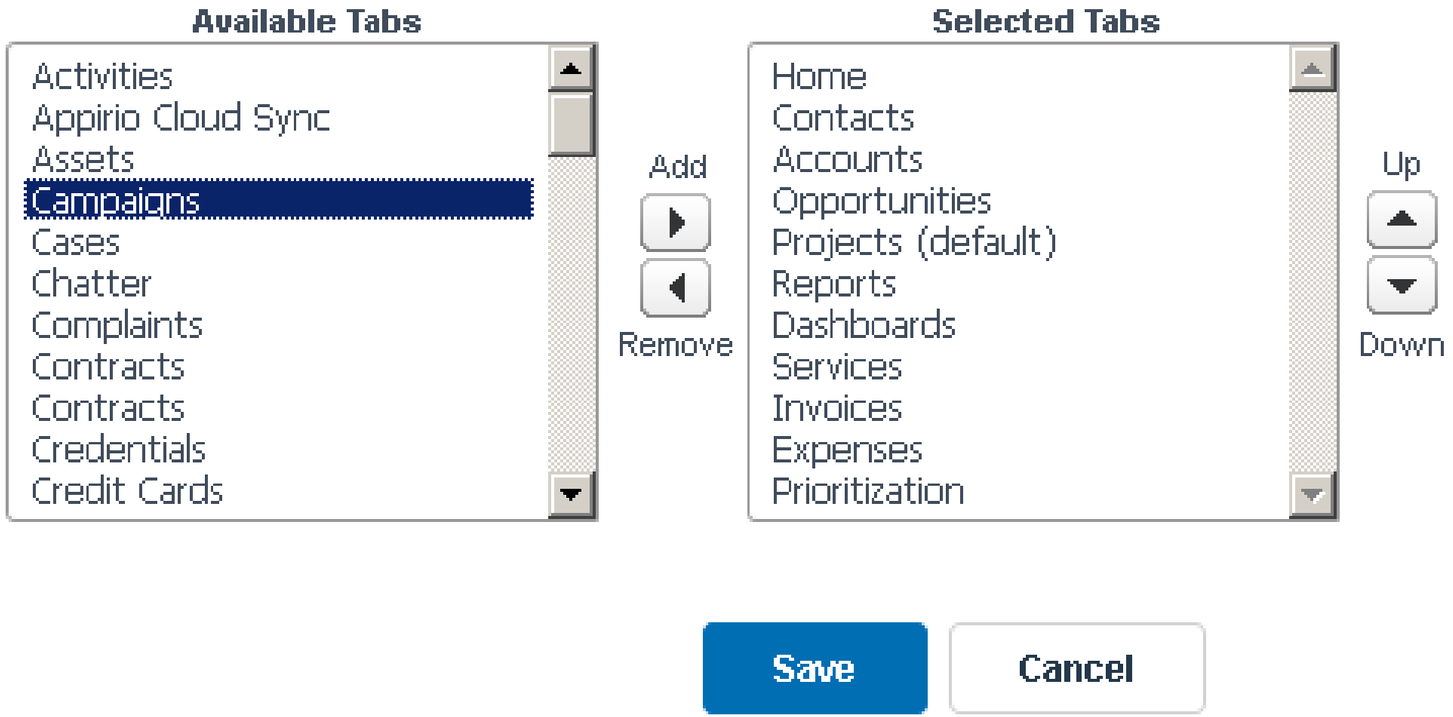
Creating and Customizing Tabs

Following are the main points to remember in custom tabs:

- Tabs can be added or removed by individual users.
- Web tabs can be added to access commonly requested sites.
- Tabs can be created to display Visualforce pages.



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Creating an App

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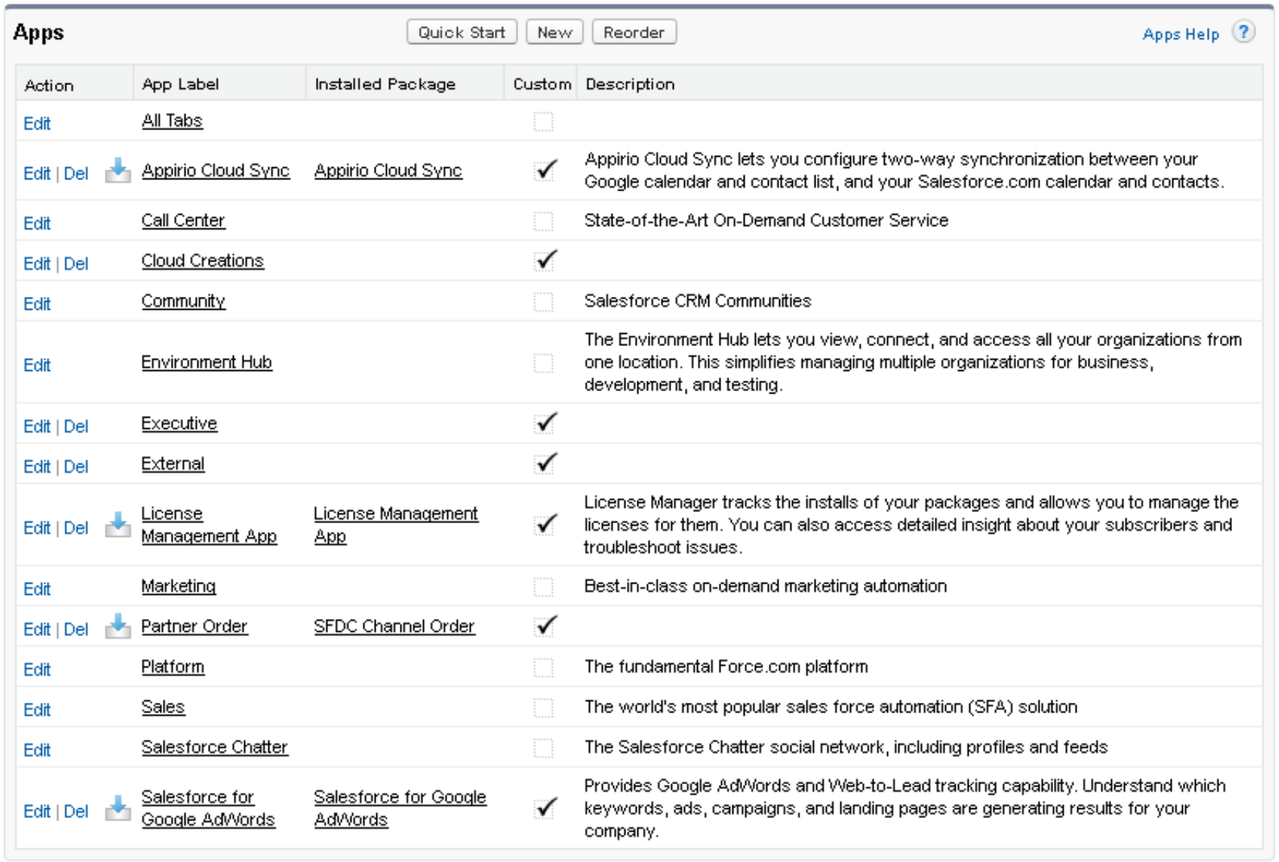
Creating an App

Following are the main points to remember while creating an app:

- Access common features
- Organize tabs in a logical manner
- Create a customizable application



Apps Quick Start | New | Reorder — Apps Help

Action	App Label	Installed Package	Custom	Description
Edit	All Tabs			
Edit | Del	Appirio Cloud Sync	Appirio Cloud Sync	✓	Appirio Cloud Sync lets you configure two-way synchronization between your Google calendar and contact list, and your Salesforce.com calendar and contacts.
Edit	Call Center			State-of-the-Art On-Demand Customer Service
Edit | Del	Cloud Creations		✓	
Edit	Community			Salesforce CRM Communities
Edit	Environment Hub			The Environment Hub lets you view, connect, and access all your organizations from one location. This simplifies managing multiple organizations for business, development, and testing.
Edit | Del	Executive		✓	
Edit | Del	External		✓	
Edit | Del	License Management App	License Management App	✓	License Manager tracks the installs of your packages and allows you to manage the licenses for them. You can also access detailed insight about your subscribers and troubleshoot issues.
Edit	Marketing			Best-in-class on-demand marketing automation
Edit | Del	Partner Order	SFDC Channel Order	✓	
Edit	Platform			The fundamental Force.com platform
Edit	Sales			The world's most popular sales force automation (SFA) solution
Edit	Salesforce Chatter			The Salesforce Chatter social network, including profiles and feeds
Edit | Del	Salesforce for Google AdWords	Salesforce for Google AdWords	✓	Provides Google AdWords and Web-to-Lead tracking capability. Understand which keywords, ads, campaigns, and landing pages are generating results for your company.

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Uploading a Company Logo

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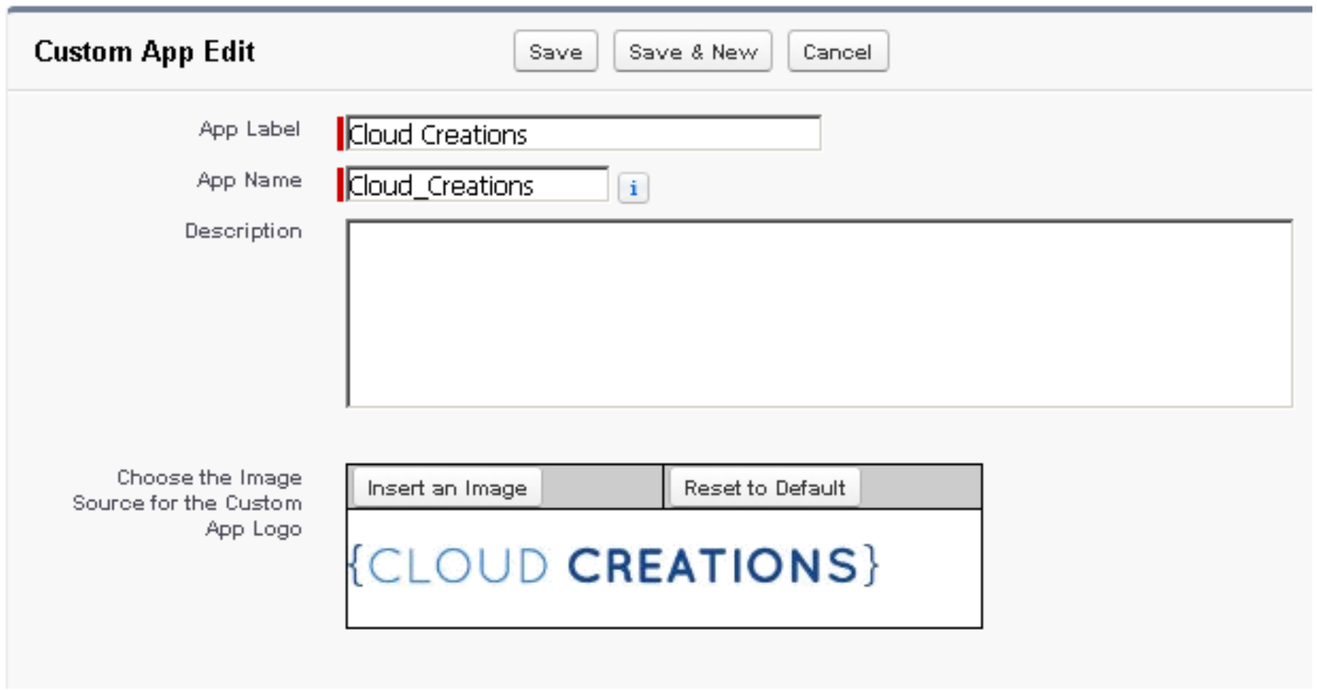
Uploading a Company Logo

Following are the main points to remember while uploading company logo:

- Logo formatting
- Uploading a logo to Documents
- Assign a logo to an App



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Company Information Page

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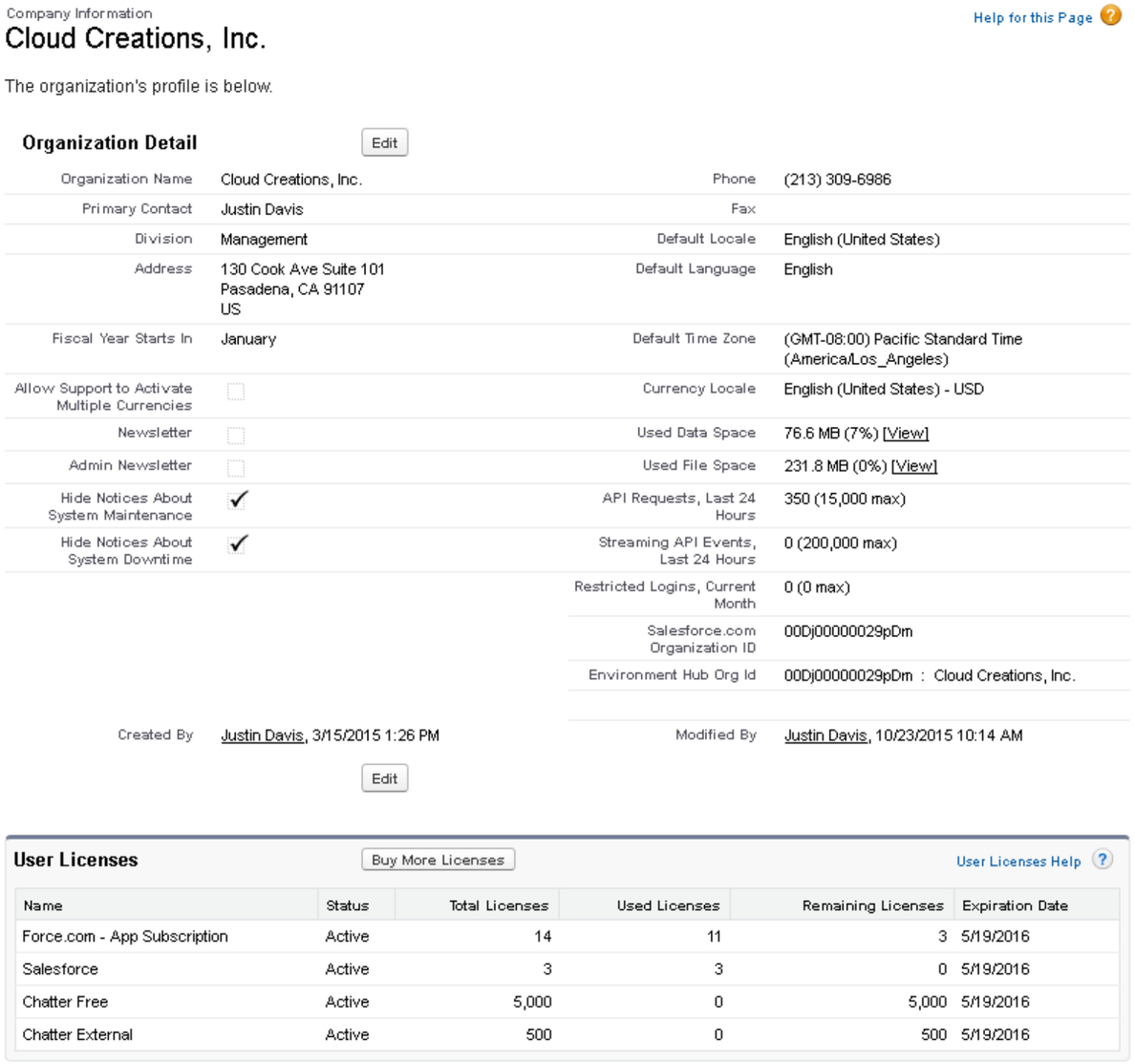
Company Information Page

Following are the main points to remember in the company information page:

- View data and file storage
- View number of active licenses available
- Update organizational details
- View Permission Sets



Company Information

Cloud Creations, Inc.

Help for this Page

The organization's profile is below.

Organization Detail Edit

Organization Name	Cloud Creations, Inc.	Phone	(213) 309-6986
Primary Contact	Justin Davis	Fax	
Division	Management	Default Locale	English (United States)
Address	130 Cook Ave Suite 101 Pasadena, CA 91107 US	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT-08:00) Pacific Standard Time (America/Los_Angeles)
Allow Support to Activate Multiple Currencies	☐	Currency Locale	English (United States) - USD
Newsletter	☐	Used Data Space	76.6 MB (7%) [View]
Admin Newsletter	☐	Used File Space	231.8 MB (0%) [View]
Hide Notices About System Maintenance	✓	API Requests, Last 24 Hours	350 (15,000 max)
Hide Notices About System Downtime	✓	Streaming API Events, Last 24 Hours	0 (200,000 max)
		Restricted Logins, Current Month	0 (0 max)
		Salesforce.com Organization ID	00Dj00000029pDm
		Environment Hub Org Id	00Dj00000029pDm : Cloud Creations, Inc.
Created By	Justin Davis, 3/15/2015 1:26 PM	Modified By	Justin Davis, 10/23/2015 10:14 AM

Edit

User Licenses Buy More Licenses User Licenses Help

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
Force.com - App Subscription	Active	14	11	3	5/19/2016
Salesforce	Active	3	3	0	5/19/2016
Chatter Free	Active	5,000	0	5,000	5/19/2016
Chatter External	Active	500	0	500	5/19/2016

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System Overview Page

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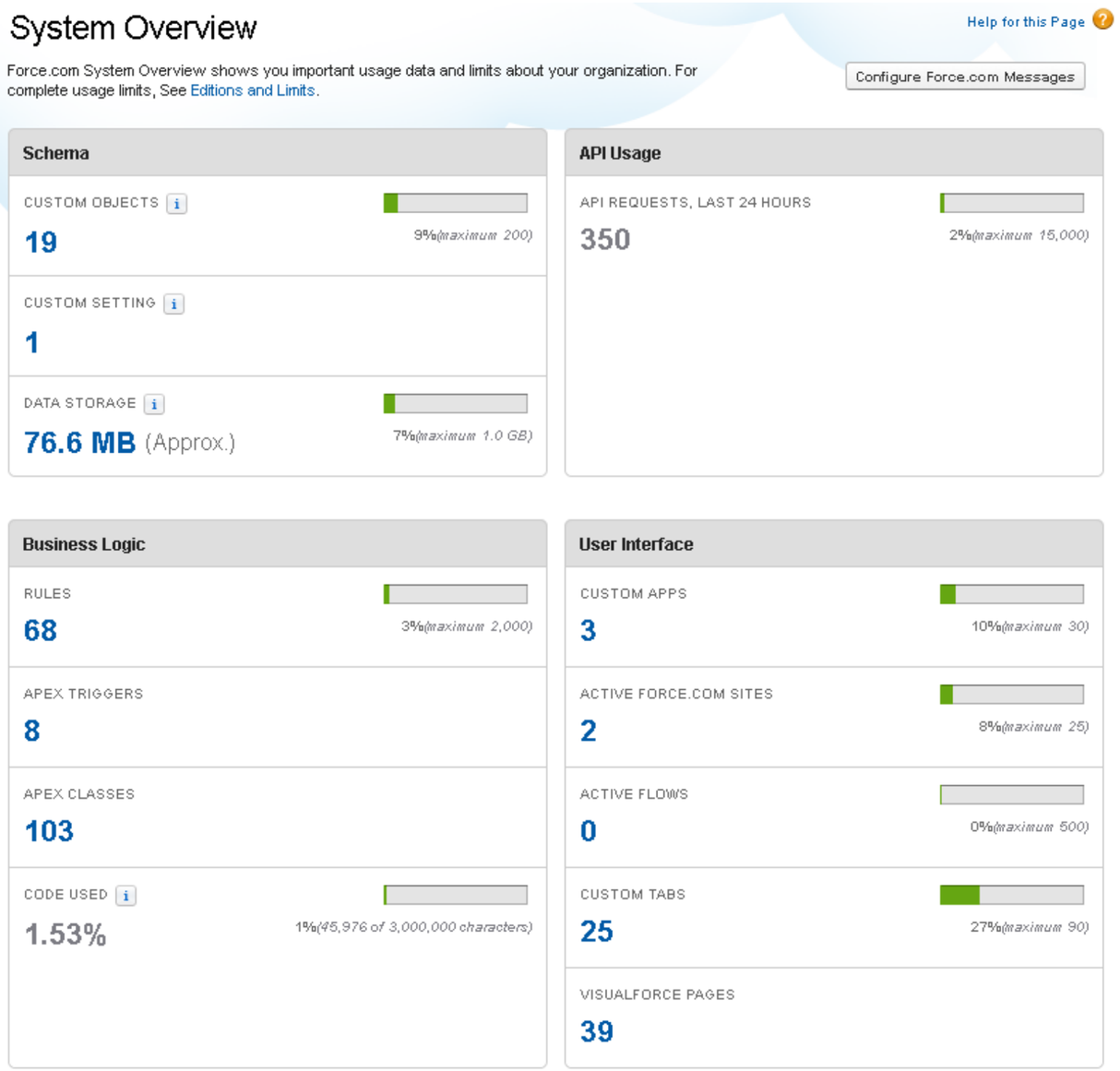
System Overview Page

In the System Overview page, you can view the number of

- custom objects
- workflow rules and custom tabs
- apex classes and API requests
- custom apps



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Updating the Fiscal Year

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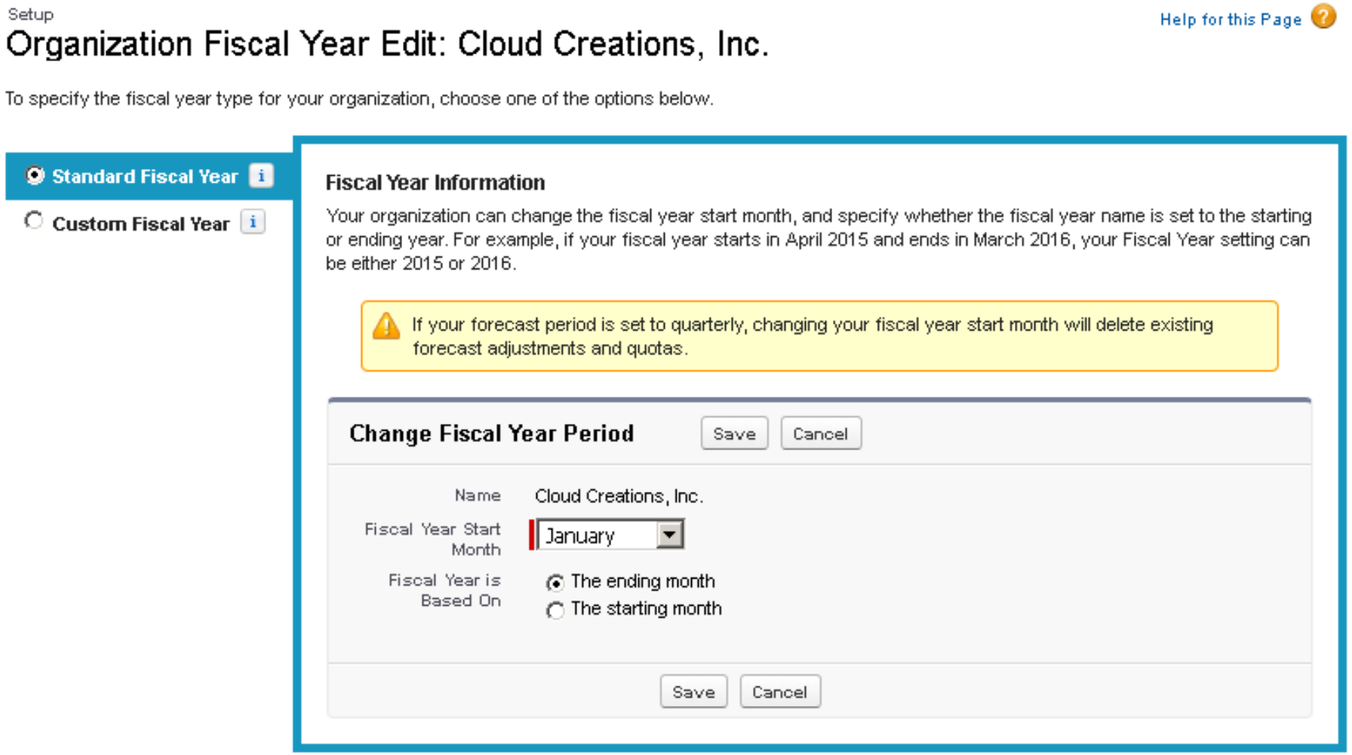
Updating the Fiscal Year

In the Fiscal Year Information page, you can

- assign a start and end month to your company and
- update Business hours for routing logic.



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Quiz

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QUIZ 1

Which of the following options is **not** a valid Salesforce Edition?

a. Professional

b. Premium

c. Enterprise

d. Unlimited

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QUIZ 1

Which of the following options is **not** a valid Salesforce Edition?

a. Professional

b. Premium

c. Enterprise

d. Unlimited

The correct answer is **b**.

There is no Premium Edition of Salesforce.

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QUIZ 2

Which component **can’t** be added to the home page?

a. Tasks

b. Calendar

c. Items to Approve

d. Workflow Rules

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QUIZ 2	Which component **can't** be added to the home page?

a. Tasks

b. Calendar

c. Items to Approve

d. Workflow Rules

The correct answer is **d**.

You can't add Workflow Rules to the Salesforce home page.

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QUIZ 3

What is the significance of the fiscal year setting?

a. It affects the time zone setting.

b. It affects the language setting.

c. It affects financial transactions.

d. None of the above

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QUIZ 3

What is the significance of the fiscal year setting?

a. It affects the time zone setting.

b. It affects the language setting.

c. It affects financial transactions.

d. None of the above

The correct answer is **c**.

Fiscal settings can affect financial transactions.

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QUIZ

4

Which of the following fields is **not** required to create a new User?

a. Department

b. First Name

c. Last Name

d. Email

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QUIZ 4

Which of the following fields is **not** required to create a new User?

a. Department

b. First Name

c. Last Name

d. Email

The correct answer is **a**.

The Department field is not required to create a new User.

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QUIZ

5

What information can you find on the Company Information page?

a. Used Data Space

b. Number of Reports

c. Installed Applications

d. Apex License

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QUIZ 5

What information can you find on the Company Information page?

a. Used Data Space

b. Number of Reports

c. Installed Applications

d. Apex License

The correct answer is **a**.

Only used data space can be found on the company information page.

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Case Study

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Case Study

Scenario | Analysis | Solution

United Containers manufactures shipping containers and sells them around the world. They need to select a CRM system that supports their business requirements, which includes sales and marketing activity management and reporting. They have been using a proprietary application built on a SQL server, and are in need of a cloud-based solution. Users are frustrated at the lack of mobile access, as well as access while traveling to visit customers. There is a need for automated emails, as well as managing wholesale vs. retail orders. One of the IT managers mentioned she implemented Salesforce at a previous company, and recommended the United Containers executives to research a Salesforce solution. United Containers decided to research which edition of Salesforce would suit them best.

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Scenario | Analysis | Solution

Enterprise Edition was determined to be the best solution because it can create:

1. workflow rules for sending automated email alerts.
2. record types for segmenting out field requirements on sales types.
3. a sandbox for testing customizations prior to deployment.

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Scenario | Analysis | Solution

The following steps were taken by United Containers to solve their issues:

1. Email templates were created with merge fields
2. Workflow Rules were created to send email notifications
3. Record types on Opportunities were created for segmenting retail and wholesale records
4. Created a new Developer sandbox
5. Activated and enabled the sandbox

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Key Takeaways

- Salesforce is a web-based customer relationship management software that allows users to log in from anywhere with an internet connection and browser.
- Salesforce offers a wide range of products suited for each organization.
- The Home Page consists of the sidebar and main area.
- Users need to be assigned an active license.

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This concludes ‘Salesforce Overview.’

The next Lesson is ‘Sales Cloud.’

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