Salesforce

# *17-07-2023*

What is salesforce? It is a CRM (customer relationship management) software application.

* It is a software that helps to build all the information around customers.
* Customer centered CRM application
* Collaboration and teaming up is at the center of the software
* It is a cloud based application

Meta data and actual data

* Everything we used in the setup to build the system is called metadata

There are different cloud application

* Community cloud
* Iot cloud
* Sales & marketing cloud
* Service cloud and experience cloud

# *18-07-2023*

* It is the basis for salesforce ( lead, contact,account)
* To create a lead: setup->home->type process->lead process->create the leads and save ( B2C,B2B)

Price book- is a collection of products and price

Basically the sales force built on the following objects

* Leads: like a business card ( potential to sell some goods/services)
* Accounts: information about the company.entity or organizations
* Contacts: related to accounts and resemble to employees working in the company
* Opportunities: related to accounts and resemble deals with the company

# *19-07-2023*

Recap

* Leads is the entry point in the sales process
* Leads can be a single person, a company or any other else
* Leads can be converted to opportunity, contact

I am configuring the stages( progress bar)

Pipeline stages

Discovery

* Leads → Lead record types → Market process to link both the leads and leads record types
* Opportunity stages picklist(creating stages for the progress bar) → Sales process(creating two sales process) → opportunity record types (linking up the sales process and the opportunity record types)

User management

* For security purposes user management is very important.
* License access to the organization - a seat
* Users - a user with a license to login
* Profiles - controls what can do - permissions
* Roles - controls what users see - access to records

# *24-07-2023*

Data modeling

* In salesforce there are standard objects and custom objects
* Standard objects are universally recognized objects that are available globally
* Custom objects are locally built objects but you can’t find them globally. They are locally available

# *25-07-2023*

What are record types and how are they used?

* Record types lets you offer different business processes and page layouts for different users
* Record type is created only for an object and you can find it there only
* Always to control which picklist are visible when creating a new record
* Record type can’t create a field to make it required
* Record type can’t use in multiple objects , it means it is specific
* Creating multiple record type is to support multiple business process
* Page layout is used to make fields required and read-only

# *26-07-2023*

What components comprise salesforce applications?

* Apps are built for a specific business purpose or team(sales, marketing or HR)

# *27-07-2023*

What is the purpose of account record?

* It contains detail information about an account ( contacts, opportunities,cases, related accounts), associated relationships and review past activities and add tasks
* We can edit the information but we can’t convert lead to an opportunity, produce a list view

What is the purpose of a contact record?

* It contains detail information about a contact ( associated accounts, opportunities and cases
* Completes numerous actions such as editing details, initiating and logging communications and reviewing past activities

What is the purpose of the opportunity record?

* Individual listing that contains the details about the opportunity, how it’s progressing, supporting documentation, and the associated relationships
* Opportunities are associated with accounts, cases and contacts and contact roles
* It Is very important for managing a deal from beginning to end.

# *31-07-2023*

What makes data quality bad?

* Missing records
* Duplicate records
* Incomplete records
* Old data

How to enhance data quality?

* Validation rules
* Formula fields -
* Lookup filters
* Address formats

# *01-08-2023*

Why and how to report?

* To learn from data
* To discover new insights
* For performance monitoring
* For decision making
* To action against something happened

**Report** is a list or summary of records that meet criteria defined using filtering, grouping , formulas etc.

**Dashboard** is a visualization of single or multiple reports

**Dimension** is a qualitative value that can group by

**Measure** is a value you can count and summarize

Summary report format is the most used report format in salesforce.

Report formats

* Summary report format
* Matrix report format
* Tabular report format
* Joined report format

# *02-08-2023*

* Users can add up to 5 custom formulas in addition to the standard summaries function.
* Formulas can reference any fields and not other summary formulas
* Types of formulas
  + Summary formula
  + Row-level formula - applicable for each row, and have only one row level formula per report

- Dashboard is a visual representation of our reports.

# *05-08-2023*

Four actions that can be performed with workflow

* Task
* Email alert
* Field alert
* Outbound message

How data is imported from external sources in salesforce?

* The supported program in salesforce to import data is .csv( comma-separated values)
* There are two ways we can use to import data in salesforce
  + Data Import wizard:
    - used to import data that are in standard objects and custom objects
    - Up to 50,00 data/time can import
    - Provides simple interface
    - You need to load less than 50,000 records.
    - The objects you need to import are supported by the wizard.
    - You don’t need the import process to be automated.
  + Data loader:
    - Client application (third party software)
    - Up to 5,000,000 records/time of any data type
    - Can be operated in UI or command line
* There are two ways how data is exported from salesforce
  + Data Export services:
    - Found in the setup menu
    - Manually exported data every week of every 29 day of the month
  + Data loader:
    - Third-party application and installed
    - Can be operated through interface or command line
    - For automated export this option is important/preferable
* Roll-up summary is based on the master-detail relationship

# *06-08-2023*

Why is user management so important in salesforce?

* Ensure users to login in to salesforce

What are the core admin responsibilities

* User management
* Data management
* Security
* Actionable analytics

There are 4 habits in user management

* Observing your users :- how to improve to the best our organization and to develop a trust with our users
* Review and report on adoption:- to see where our users are struggling
* Communicating with stakeholders:- building a trust with the leaders and building best solutions
* Create and maintain user guides:- boosting adoption, admin efficiency of the organization

Why is data management important?

* To boost, ensure business continuity and maintain a single source of truth
* To boost adoption, high quality of data is needed

There are 4 habits in data management

* Create and maintain a backup solution :- ensure data backup for your business continuity
* Cleanse data:- increase business value and adoption
* Reviewing and refreshing our sadboxes
* Maintain and improve your organization:- delight users with improved performance
* Maintain your data dictionary:- improve collaboration with IT, developers and consultants

Why is security important?

* To protect sensitive data
* Providing solutions to enable the customer to secure his data

How to secure your organization data?

* Educate customers on the need of security and how to enable it
* Use the principle of least privilege

What are the habits of security?

* Communicate regularly with IT:-increase compliance and reduce risk
* Reviewing access and visibility: reducing risk by confirming user access



**Organization level security mechanism**:- single sign on, multi factor authentication, password policies and certificate & key management

**Persona level security mechanisms**: profile, permission set, permission set group, IP restrictions and login hours

**Record level security mechanisms**: organization defaults, sharing rules, sets and groups, role hierarchy, manual and programmatic sharings, teams and territories

**Field level security mechanism**: field level security

* Learn continuously:- stay informed and reduce risks

Why is actionable analytics important?

* Allows your company is making decisions based on the salesforce data

What are the habits of actionable analytics?

* Conducting quarterly business review (QBR)
* Confirm and update KPI :- measure transparently business alignments
* Review and updates reports and dashboards:- build trust with single source of truth

# *07-08-2023*

# *08-08-2023*

Services and support applications

* Allows to automate service processes, streamline workflows and find key articles, topics and experts to support the agent. Its purpose is to foster one-to-one marketing relationships.
* Standard objects in service cloud are: account, contact, opportunity, case , campaign, lead
* Create auto-response, escalation rules, assignment rules and workflow process
* Escalation rule automatically re-routes a case if it is not resolved within a certain period
* Assignment rule is when a case is created it determines how it is assigned
* Assignment rules dictate to whom a lead or case is assigned based on criteria specified within Salesforce
* One assignment rule is applicable at a time
* Your organization will have one rule for each overall purpose — like one lead assignment rule for importing leads and a different lead assignment rule for web-generated leads
* Queue allow users to prioritize, distribute, and assign records

# *09-08-2023*

What is process automation and why is it used?

Automation tools

Workflow:- eg, used for simple business process send an email upon record insert

Process builder

Approval process

Flow process

Workflow automates the following types of actions based on your organization's processes:

* bulletTasks—Assign a new task to a user, role, or record owner.
* bulletEmail Alerts—Send an email to one or more recipients you specify.
* bulletField Updates—Update the value of a field on a record.
* bulletOutbound Messages—Send a secure, configurable API message (in XML format) to a designated listener.

Approval process defining a series of steps to automate the process for approving records

What are the stages of approval?

* Initial submissions
* Final approval
* Final rejection
* Recall actions

# *13-08-2023*

* Service cloud is an easy-to-use customer service application that can help you provide and track excellent services. This service helps to increase customer happiness
* At the heart of the service cloud the service console is a help desk that helps the service team to have a personalized view of each customer and their case.
* Case is a customizable record in salesforce that tracks and describes a customer issue, compliant, request.

# *14-08-2023*

Automation generally fall in to two:

* Interactive experiences
* Behind the scene automation

# *14-08-2023*