

# Overview

## Lesson 1: Salesforce CRM Overview

salesforce

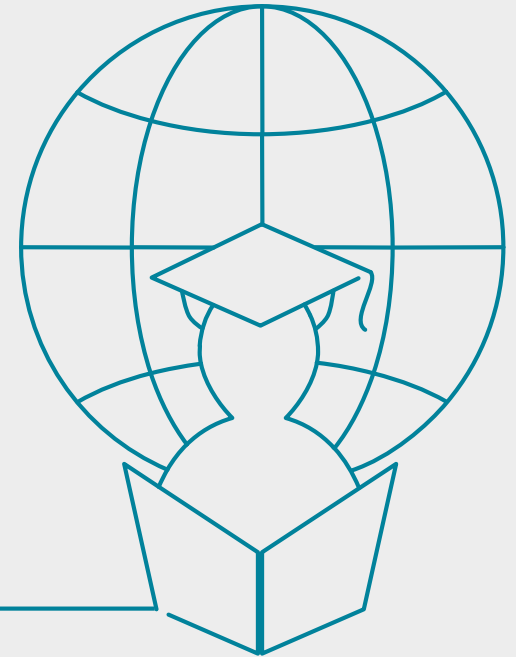
global strategic  
consulting partner



# Lesson Objectives

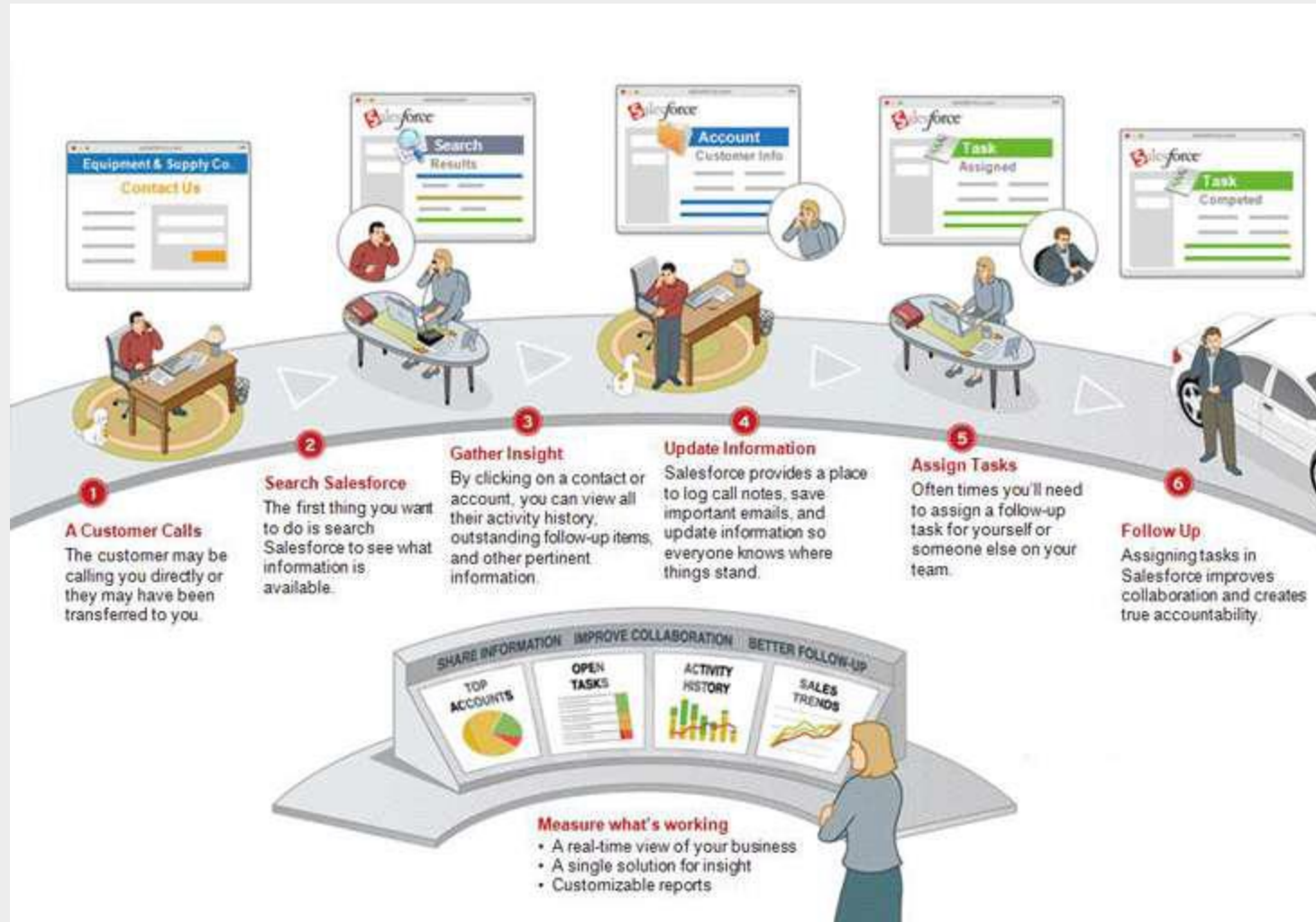
In this lesson, you will learn about:

- Salesforce CRM Overview
- Cloud Computing
- Salesforce Objects
- Organization setup



# 1.1: Salesforce CRM Overview

## Salesforce CRM Overview





# 1.1: Salesforce CRM Overview

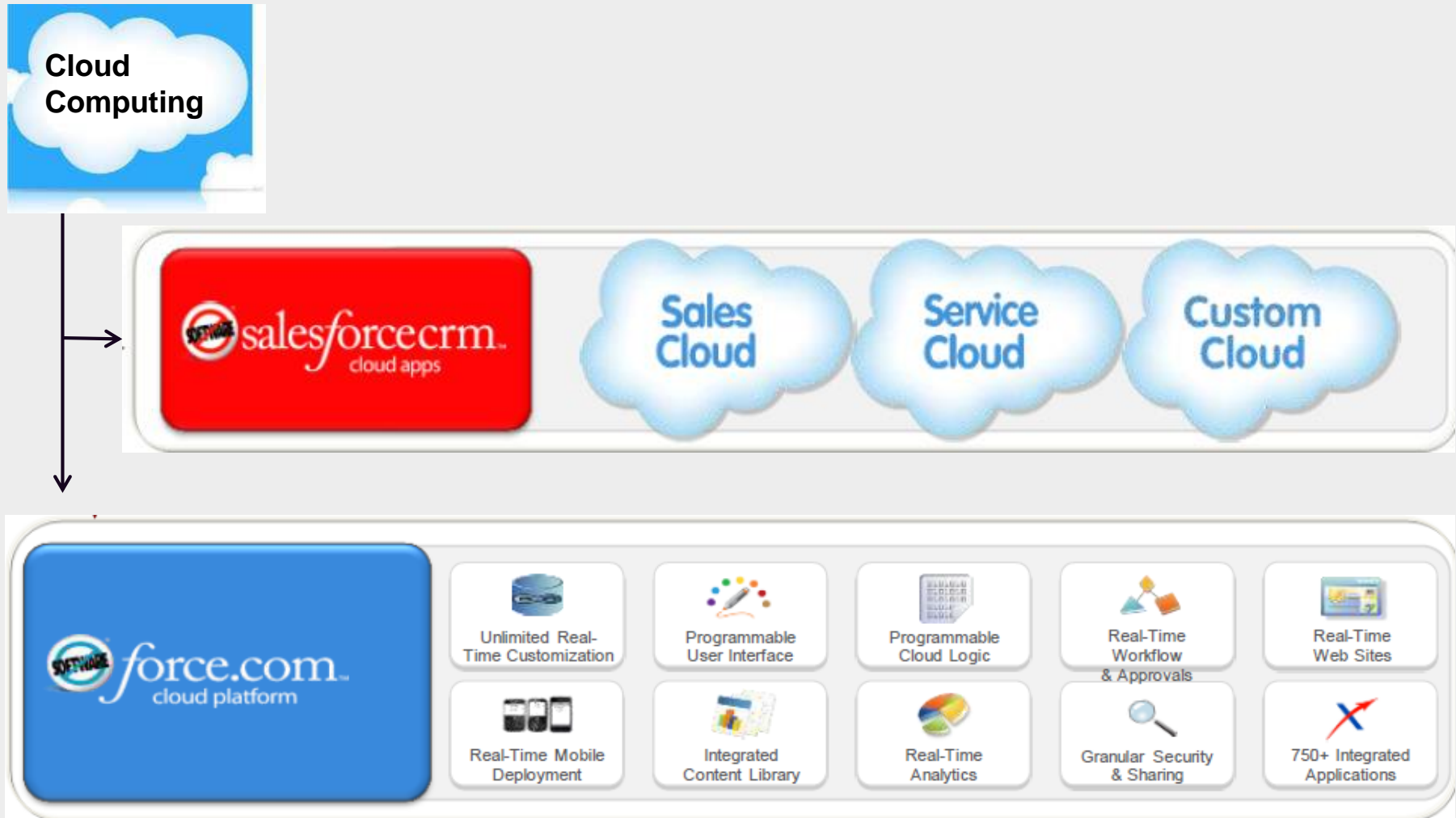
## Salesforce CRM Overview

### **What is Salesforce.Com?**

Salesforce CRM is a web-based Customer Relationship Management (CRM) service.

- It hosts the applications offsite & is best known for its Customer Relationship Management (CRM) products.
- It allows you to create a single view of your customers and leads, coordinate your sales, marketing and customer service activities and provides an overview into how your business is operating.
- You can generate, manage, and report on leads, opportunities and track results from first contact to won or lost business.
- You can see the results of your marketing campaigns and understand their impact using real-time analytics.
- It helps to improve efficiency, reduces administration time and lets you focus more on your business by reducing the time taken to search for information by providing a centralised service.

## 1.2: What is Force.com? Welcome to Cloud2



## 1.2: Sales Cloud Sales Cloud

### Drive Results with the Sales Cloud



## 1.2: Sales Cloud Business Drivers, Processes and Sales Cloud Solutions

Business Drivers	Business Processes	Sales Cloud Solutions	
Build a Strong Pipeline	Lead Generation	Automated Lead Capture and Import	Sales Force Automation (SFA)
	Lead Qualification	<ul style="list-style-type: none"> <li>Lead Scoring &amp; Routing</li> <li>Lead Conversion</li> <li>Alerts &amp; Monitoring</li> </ul>	
Manage the Funnel	Sales Methodology	Opportunity Management	
	Visibility of the Sales Forecast	Forecasts	
Improve Sales Rep Productivity	Account and Contact Management	<ul style="list-style-type: none"> <li>360 Degree View</li> <li>Approvals</li> </ul>	
	Activity Management	Activity Sharing & Tracking	
Drive More Business	Demand Generation	Campaign Management Segmentation	Marketing
	Search Marketing	<ul style="list-style-type: none"> <li>Website Integration</li> <li>Google AdWords</li> </ul>	
	Lead Handoff	Feedback from Sales	
Align Sales and Marketing	Brand Management	<ul style="list-style-type: none"> <li>Email Templates</li> <li>Communications</li> </ul>	
	Marketing Collateral Management	Collateral & Documents	

# 1.1: Service Cloud

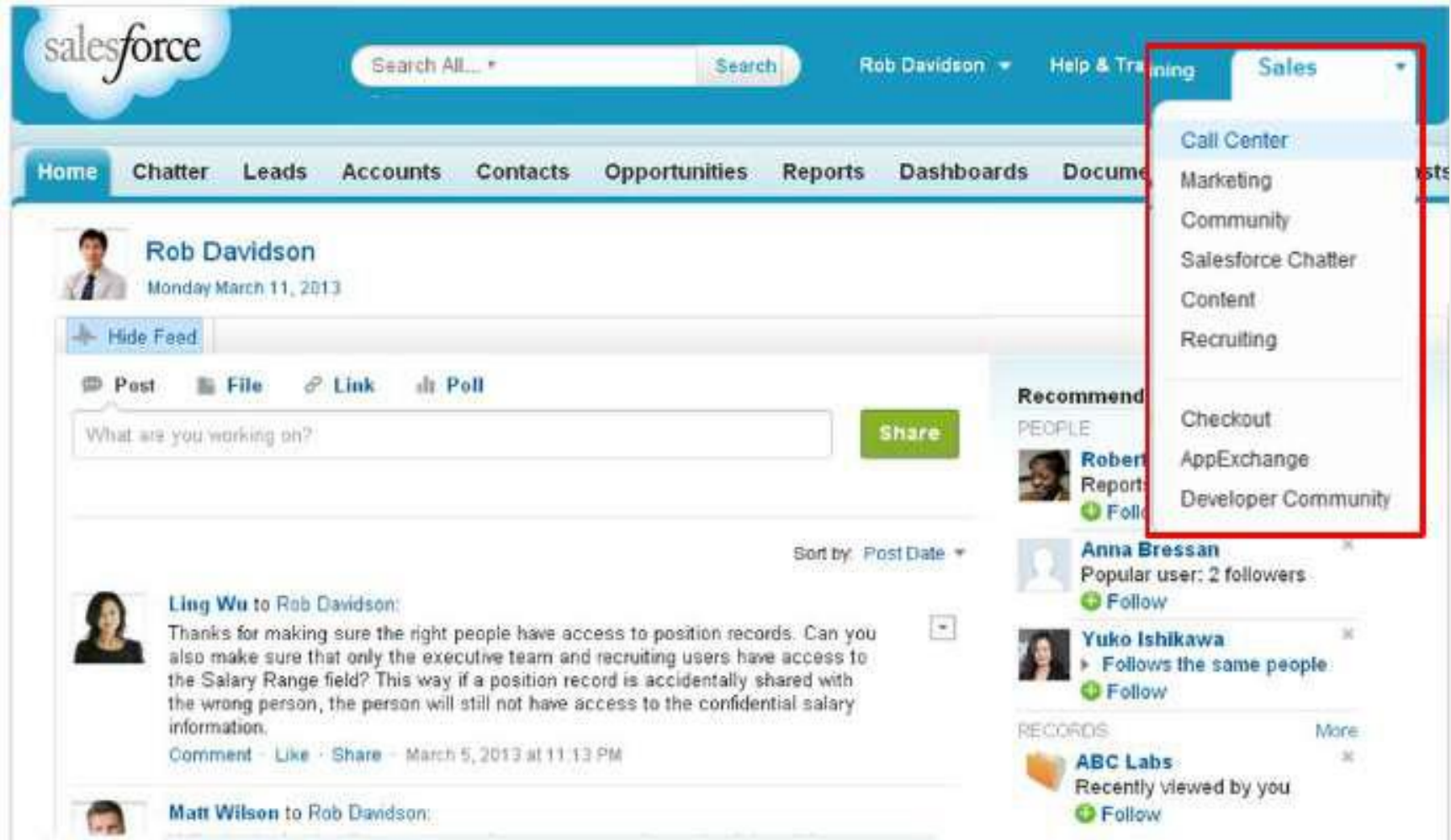
## Service Cloud





# 1.1: Salesforce Application

## Salesforce Application



The screenshot displays the Salesforce application interface. The top navigation bar features the Salesforce logo, a search bar, and user information (Rob Davidson). Below this is a secondary navigation bar with tabs for Home, Chatter, Leads, Accounts, Contacts, Opportunities, Reports, Dashboards, and Documents. The main content area shows a Chatter feed for Rob Davidson, dated Monday March 11, 2013. A post by Ling Wu is visible, asking for help with position records. On the right, there is a sidebar with recommendations for people (Robert Report, Anna Bressan, Yuko Ishikawa) and records (ABC Labs). A red box highlights the 'Sales' dropdown menu, which lists various Salesforce modules: Call Center, Marketing, Community, Salesforce Chatter, Content, Recruiting, Checkout, AppExchange, and Developer Community.

## 1.3: Salesforce Objects

### Salesforce Object

- What are Objects?
- How are they related?
- How can I navigate between them?



An object is a table of data containing records.

	A	B	C	D
1	Account Owner	Account Name	Industry	Billing City
2	Phil Smith	ABC Labs	Biotechnology	San Jose
3	Phil Smith	Acme Inc.	Manufacturing	Atlanta
4	Phil Smith	Acme-NY	Manufacturing	New York
5	Phil Smith	American Bank	Banking	Charlotte
6	Phil Smith	American Package	Shipping	Atlanta
7	David Hudson	American Package_UK	Shipping	London
8	Phil Smith	AMP Industries	Manufacturing	San Francisco
9	Phil Smith	AmShip Corporation	Shipping	Memphis
10	Phil Smith	Arbuckle Laboratories	Biotechnology	Arbuckle Park
11	David Hudson	Arbuckle Laboratories - Austria	Biotechnology	Vienna
12	David Hudson	Arbuckle Laboratories - France	Biotechnology	Paris
13	Anjana Shah	Arbuckle Laboratories - Germany	Biotechnology	Weisbaden
14	Phil Smith	Cable Inc.	Entertainment	New York
15	Lia Chang	Cancer	Technology	Obtuse

## 1.4: Standard Objects Standard Objects

Accounts

Contacts

Opportunities

Cases

Solutions

Campaigns

Leads

### Accounts



- Organizations that you need to track, such as customers
- Have related contacts, opportunities, and cases

Home Chatter Leads **Accounts** Contacts Opportunities Reports Groups Dashboards

Account ABC Labs

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed Follow

Opportunities (0) | Contacts (0) | Account History (0) | Open Activities (0) | Activity History (0) | Cases (0) | Partners (0) | Notes & Attachments (0) | Account Team (0)

Account Detail

Edit Delete Sharing

Account Owner	Phil Smith [Change]	Phone	1-408-555-3001
Account Name	ABC Labs [View Hierarchy]	Fax	1-408-555-2000
Parent Account		Website	http://www.ABC Labs.net
Credit Status	Excellent	Prospect Rating	Warm

# 1.4: Standard Objects

## Standard Objects - Accounts

Accounts

Contacts

Opportunities

Cases

Solutions

Campaigns

Leads

### Accounts



- Organizations that you need to track, such as customers
- Have related contacts, opportunities, and cases

Home Chatter Leads **Accounts** Contacts Opportunities Reports Groups Dashboards

Account ABC Labs

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed Follow

Opportunities (0) | Contacts (0) | Account History (0) | Open Activities (0) | Activity History (0) | Cases (0) | Partners (0) | Notes & Attachments (0) | Account Team (0)

Account Detail

Edit Delete Sharing

Account Owner	Phil Smith [Change]	Phone	1-408-555-3001
Account Name	ABC Labs [View Hierarchy]	Fax	1-408-555-2000
Parent Account		Website	http://www.ABC Labs.net
Credit Status	Excellent	Prospect Rating	Warm



# 1.4: Standard Objects

## Standard Objects - Contacts

Accounts

Contacts

Opportunities

Cases

Solutions

Campaigns

Leads

### Contacts



- Individuals associated with your accounts
- Have related cases

Home Chatter Leads Accounts **Contacts** Opportunities Reports Groups Dashboards

Contact

Arnold Adams

Customize Page | Edit Layout | Portable View | Help for this Page

Show Feed Follow

Open Activities 00 | Activity History 00 | Opportunities 00 | Cases 00 | Notes & Attachments 00 | HTML Email Status 00 | Campaign History 00

Contact Detail

Edit Delete Close Sharing Request Update

Contact Owner

Phil Smith [Change]

Phone

1-408-555-2122

Name

Arnold Adams

Mobile

Account Name

ABC Labs

Email

adams@training.abc.com

Title

IT Manager

Reports To

[View Org Chart]

Position

IT

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# 1.4: Standard Objects

## Standard Objects - Opportunities

Accounts

Contacts

Opportunities


Cases

Solutions

Campaigns

Leads

### Opportunities



- Potential sales associated with your accounts
- Make up your pipeline and forecasts
- Associated with contacts

Home Chatter Leads Accounts Contacts Opportunities Reports Groups Dashboards +

Opportunity

Canson - 18 Spider 3 Series Laptops

Customize Page (Edit Layout) Favorite View Help for this Page

Show Feed Following

Recent History All Open Activities All Related Items All Contact Roles All Partners All Communities All Products All Sales & Accounts All Task History All Opportunities Team All

Opportunity Detail

Edit Delete Close Sharing

Opportunity Owner	Anna Rossini (Change)	Close Date	8/18/2012
Opportunity Name	Canson - 18 Spider 3 Series Laptops	Stage	Needs Analysis
Account Name	Canson	Probability (%)	30%
Type	New Business	Amount	USD 363,250.00
Primary Campaign Source	AWA Email Campaign - US 2010	Opportunity Record Type	1. B2B Prospecting (Change)
Discount Percentage			
Commission	USD 0.00		
Region Code	APAC-East Asia		
Discounted Amount	USD 363,250.00		
Approval Status			

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## 1.4: Standard Objects

### Standard Objects - Cases

Accounts

Contacts

Opportunities

Cases

Solutions

Campaigns

Leads

## Cases



- Customer feedback, problems, or questions
- Associated with accounts and contacts
- Used to resolve issues

Home Chatter Files Accounts Contacts **Cases** Solutions Reports Da

Case

00001004

Customize Page | Edit Layout | Printable View | Help for this Page

[Solutions \(0\)](#) | [Open Activities \(0\)](#) | [Activity History \(0\)](#) | [Case Comments \(0\)](#) | [Case History \(0\)](#) | [Attachments \(0\)](#)

**Case Detail** Edit Delete Close Case Clone

Case Owner  [Tim Howe \[Change\]](#)

Case Number 00001004

Contact Name [Arnold Adams](#)

Account Name [ABC Labs](#)

Subject Screen Flicker on Spider Series Laptop

Contact Phone 1-408-555-2122

Contact Email [arnold.adams@trainingorg-abclabs.com](mailto:arnold.adams@trainingorg-abclabs.com)

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## 1.4: Standard Objects

### Standard Objects - Solutions

Accounts

Contacts

Opportunities


Cases

**Solutions**

Campaigns

Leads

## Solutions



- Descriptions of customer issues and resolutions
- Associated with cases

Home Chatter Leads Accounts Contacts Opportunities Reports Dashboards Documents

Solution

Why is my monitor flickering?

Customize Page | Edit Layout | Printable View | Help for this Page

[Back to List: Solutions](#)

[Cases \(0\)](#) | [Solution History \(0\)](#) | [Attachments \(0\)](#)

Solution Detail

Edit Delete

Solution Number00000001

Visible in Self-Service Portal☐

StatusDraft

Visible in Public Knowledge Base☐

▼ Detail Information

Solution Title

Why is my monitor flickering?

Solution Details

To cut down on your monitor flicker, select Properties - Settings - Advanced - Monitor - and click the Apply button.



## 1.4: Standard Objects

### Standard Objects - Campaigns

Accounts

Contacts

Opportunities

Cases

Solutions

Campaigns

Leads

### Campaigns



- Marketing projects
- Related leads and contacts show as campaign members
- Have related opportunities

Home Chatter Files Campaigns Leads Contacts Opportunities Reports

Campaign

 Spider 2 Series Laptop Campaign - Email

[Campaign Hierarchy \(1\)](#) | [Open Activities \(0\)](#) | [Activity History \(0\)](#) | [Opportunities \(0\)](#)

**Campaign Detail** Edit Delete Clone Manage Members ▾

Campaign Owner

 Mimi Sato [\[Change\]](#)

Campaign Name

Spider 2 Series Laptop Campaign - Email [\[View Hierarchy\]](#)

Campaign

Active

✓

Parent Campaign

Description

Email campaign for the Spider 3 series laptop.

## 1.4: Standard Objects

### Standard Objects - Leads

- Accounts
- Contacts
- Opportunities
- Cases
- Solutions
- Campaigns
- Leads**

### Leads



- Individuals interested in your products or services
- Associated to campaigns
- Converted into accounts, contacts, and opportunities

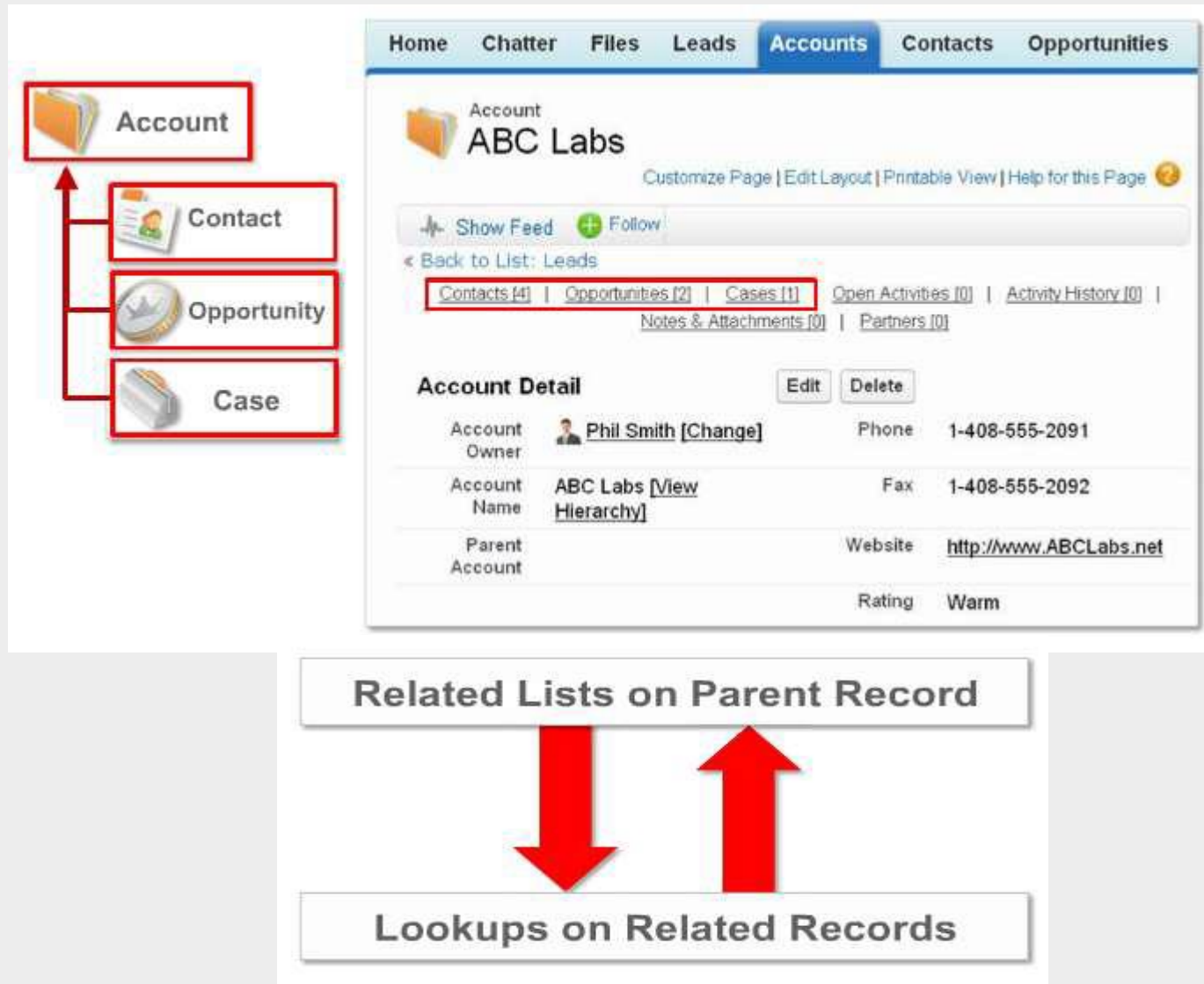


The screenshot shows the Salesforce interface for a Lead named Jon Airaudi. The page includes a navigation bar with tabs for Home, Chatter, Leads (selected), Accounts, Contacts, Opportunities, Reports, Dashboards, and Documents. Below the navigation bar, there's a section for 'Lead Jon Airaudi' with a 'Show Feed' and 'Follow' button. A 'Back to List: Leads' link is also present. The 'Lead Detail' section includes buttons for Edit, Delete, Convert, Close, Sharing, and Find Duplicates. The lead's information is displayed in a table-like format:

Lead Owner	Lorenzo Costa (Changed)	Lead Status	Open
Name	Jon Airaudi	Phone	1-415-556-4274
Company	Berk Hath Inc	Email	jon.airaudi@tranningong-berkhathinc.com
Title	Director	Rating	Warm
Region			
Employee Referral			

# 1.4: Salesforce Objects

## Salesforce Object Relationships



## 1.5: Organization Setup

### Organization Setup

Company profile:



The company profile is a collection of information about a company, mostly captured at contractual signup.

#### Company Information

Name and address

Primary contact

Default locale

Default currency

Storage used

Licences available

#### Financial Information

Fiscal Year

Currencies

#### Support Information

Business Hours

Holidays



**Your Name | Setup | Company Profile**



## 1.5: Organization Setup Locale Settings

Locale

Language

Time Zone

### Locale

Locale determines how dates, times, numbers, and names are displayed.

Default Locale	English (United States)	Default Locale	French (France)
Start	12/14/2011 4:00 PM	Start	14/12/2011 16:00
End	12/14/2011 5:00 PM	End	14/12/2011 17:00
Amount	USD 5,000.00	Amount	USD 5 000,00

Default Locale Japanese (Japan)

Created By Davidson Rob, 2011/11/08 8:23

# 1.5: Organization Setup Locale Settings

Locale

Language

Time Zone

## Language

Language determines the language in the user interface and in Help & Training.

Default Language

English

Home

Chatter

Files

Leads

Accounts

Accounts

Home

View: All Accounts

Get

Edit

Recent Accounts

New

Account Name	Billing City	Phone
American Bank	Charlotte	1-800
ABC Labs	San Jose	1-408

Default Language

French

Accueil

Chatter

Fichiers

Pistes

Comptes

Comptes

Accueil

Afficher: Tous les comptes

OK

Comptes récents

Nouveau

Voir

Nom du compte	Facturation - Ville	Téléphone
American Bank	Charlotte	1-800
ABC Labs	San Jose	1-408

## 1.5: Organization Setup Locale Settings




Locale

Language

Time Zone

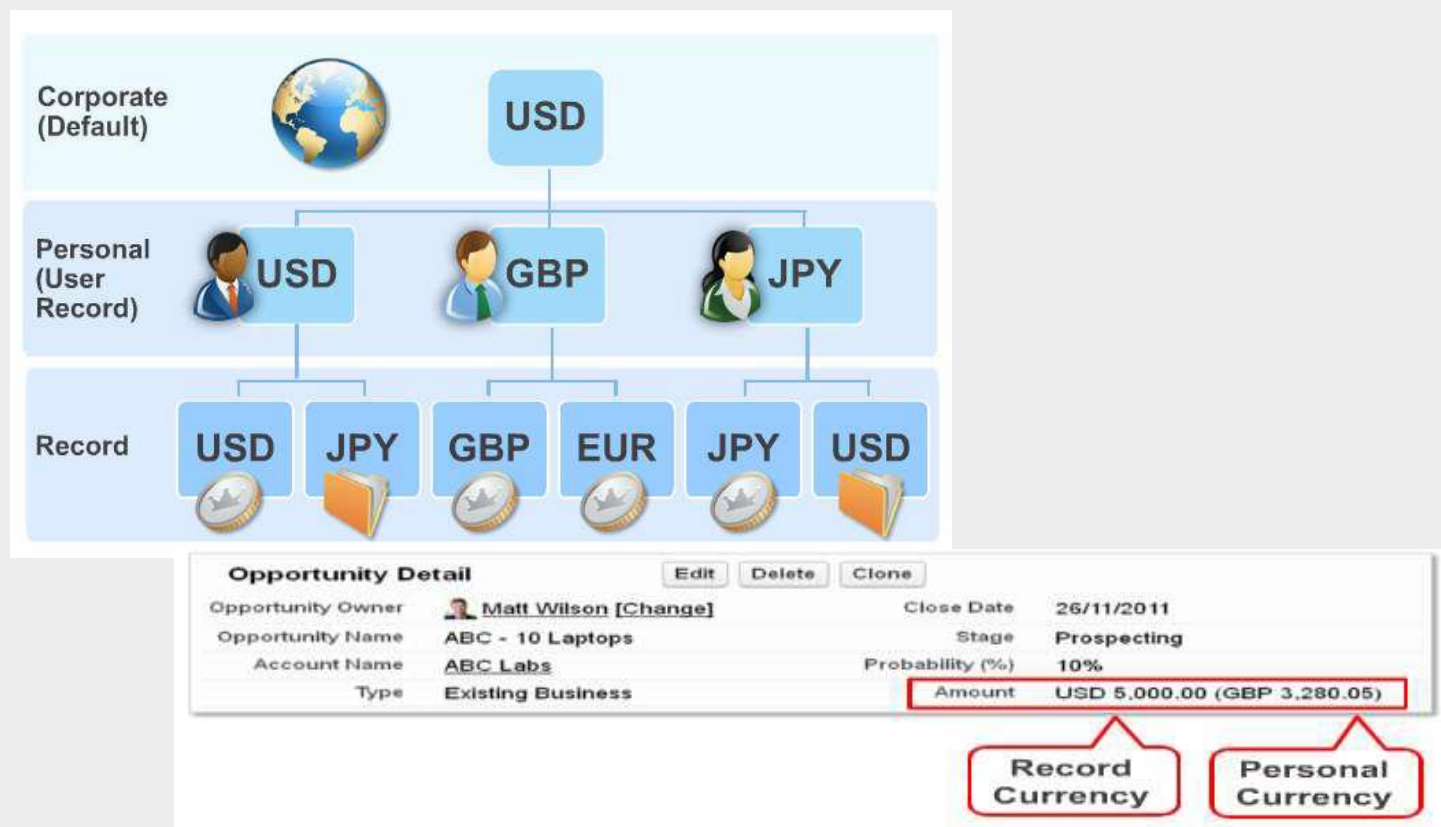
### Time Zone

Time zone determines the time zone used for event start and end times, and in Date/Time fields.

  		<b>1</b>	<b>7</b>	<b>31</b>	<b>December,</b>
	<b>Monday</b>		<b>Tuesday</b>		
<b>Week</b>	<u>28</u> +		<u>29</u> +		
	16:30 - 17:30 Initial Meeting (Customer Site) : Arnold Adams		16:00 - 16:30 Follow Up Call (Customer Site) : Arnold Adams		
<b>Week</b>	<u>5</u> +		<u>6</u> +		
	13:30 - 14:30 Follow Up Meeting (Customer Site) : Bertha Boxer				

# 1.5: Organization Setup Fiscal Year and Currency

## Standard and Custom Fiscal Years Working with Multiple currencies





In this lesson, you have learnt:

- CRM
- What is Force.com?
- Cloud computing
- CRM standard object:
  - Accounts
  - Contacts
  - Opportunity
  - Campaigns
  - Solutions
  - Cases
  - Leads

