Overview

Lesson 1: Salesforce CRM Overview

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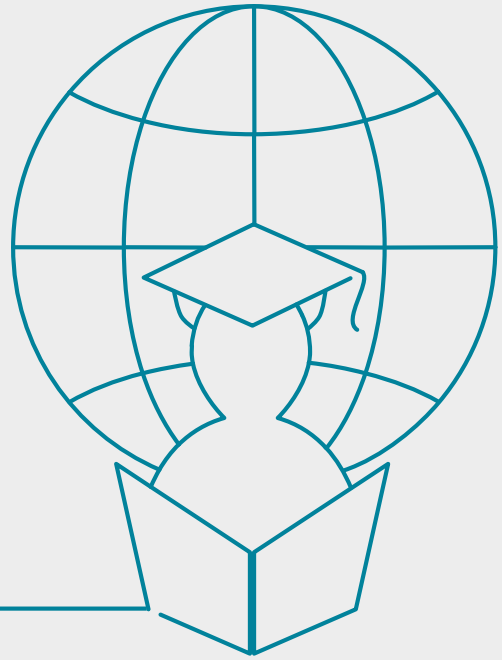
Lesson Objectives

In this lesson, you will learn about:

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



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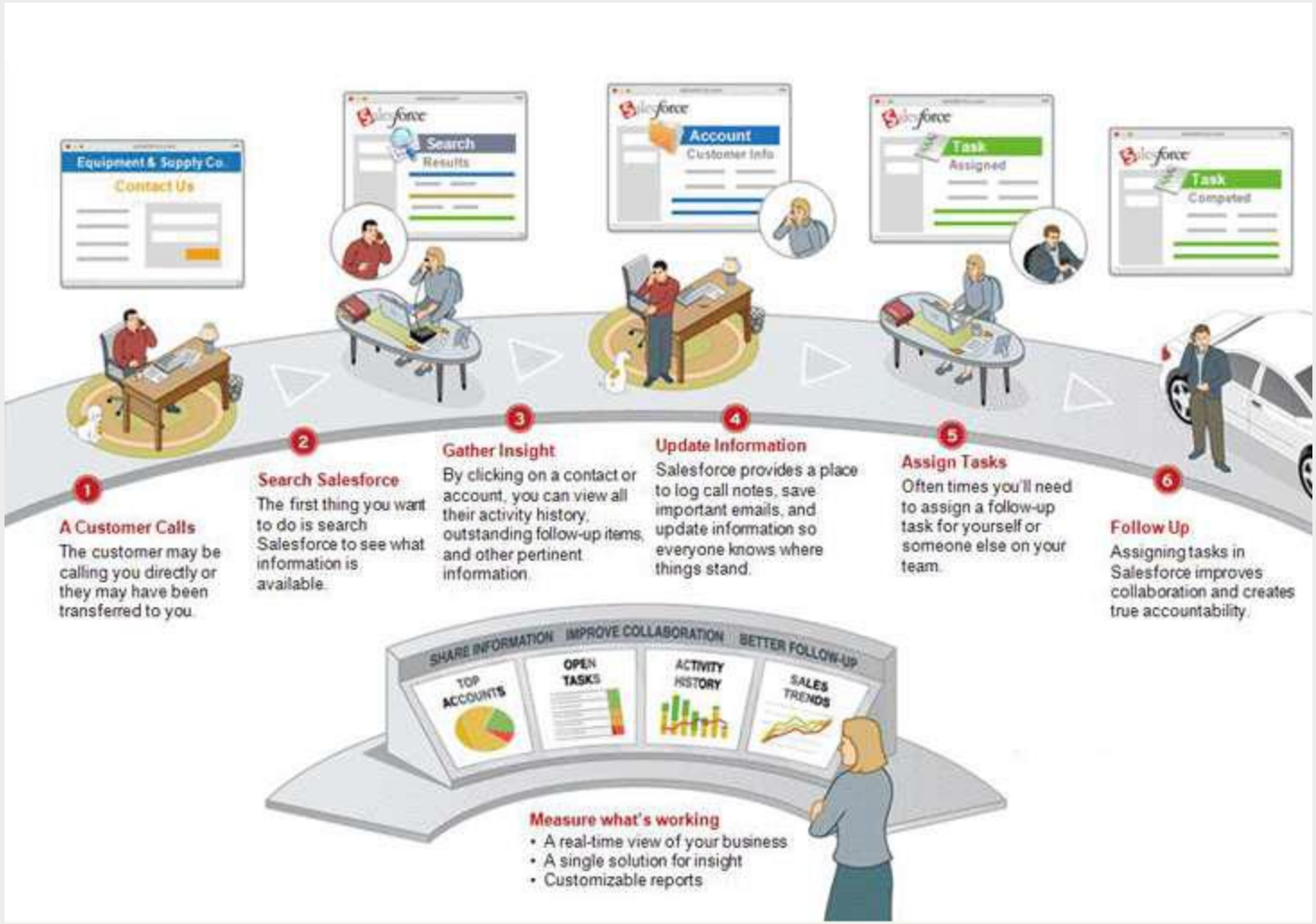
Salesforce CRM Overview



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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 improves 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.

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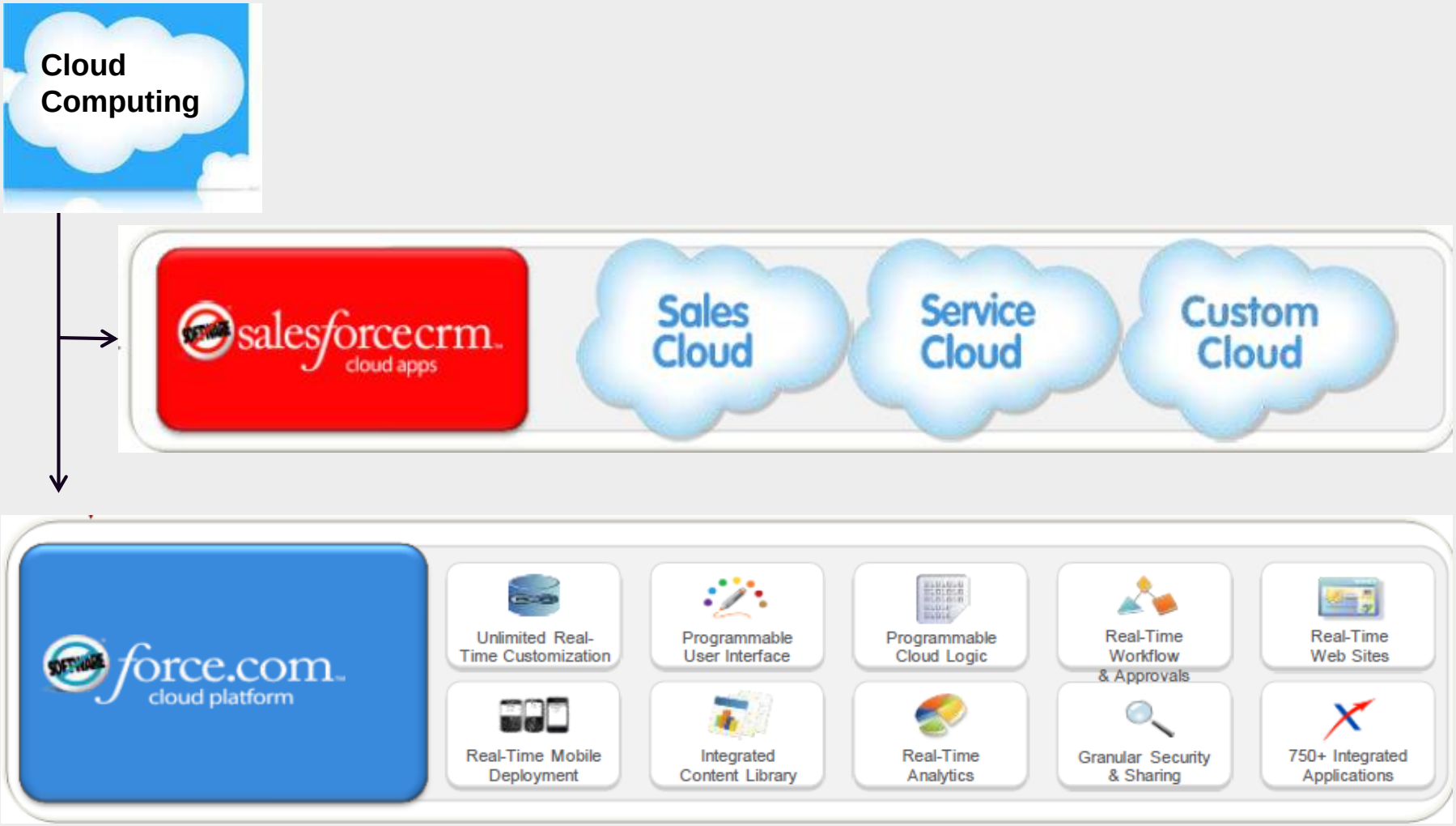
1.2: What is Force.com?
Welcome to Cloud2



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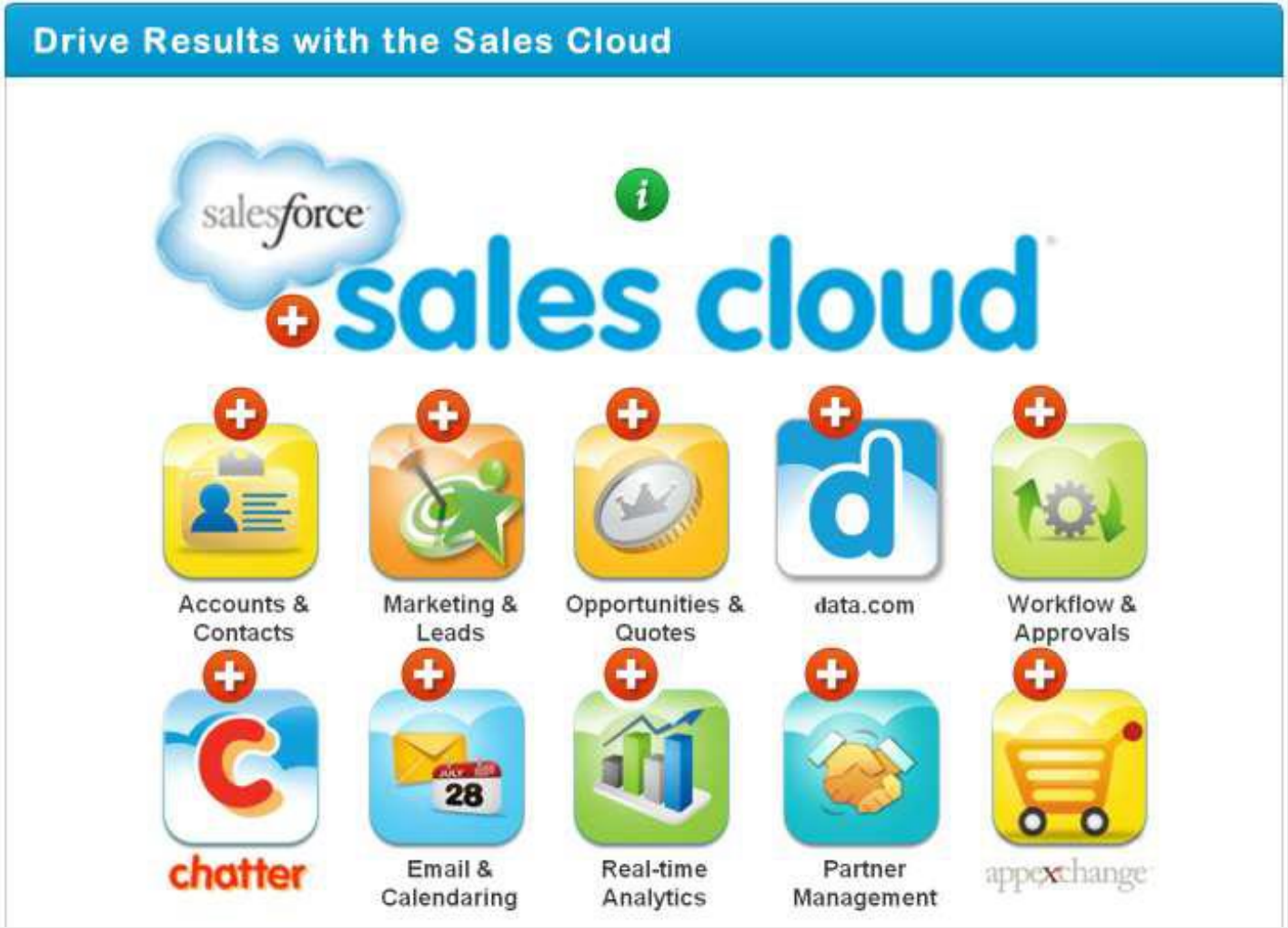
1.2: Sales Cloud
Sales Cloud



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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	▪ Lead Scoring & Routing ▪ Lead Conversion ▪ Alerts & Monitoring	
Manage the Funnel	Sales Methodology	Opportunity Management	
	Visibility of the Sales Forecast	Forecasts	
Improve Sales Rep Productivity	Account and Contact Management	▪ 360 Degree View ▪ Approvals	
	Activity Management	Activity Sharing & Tracking	
Drive More Business	Demand Generation	Campaign Management Segmentation	Marketing
	Search Marketing	▪ Website Integration ▪ Google AdWords	
Align Sales and Marketing	Lead Handoff	Feedback from Sales	
	Brand Management	▪ Email Templates ▪ Communications	
	Marketing Collateral Management	Collateral & Documents	

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1.1: Service Cloud
Service Cloud

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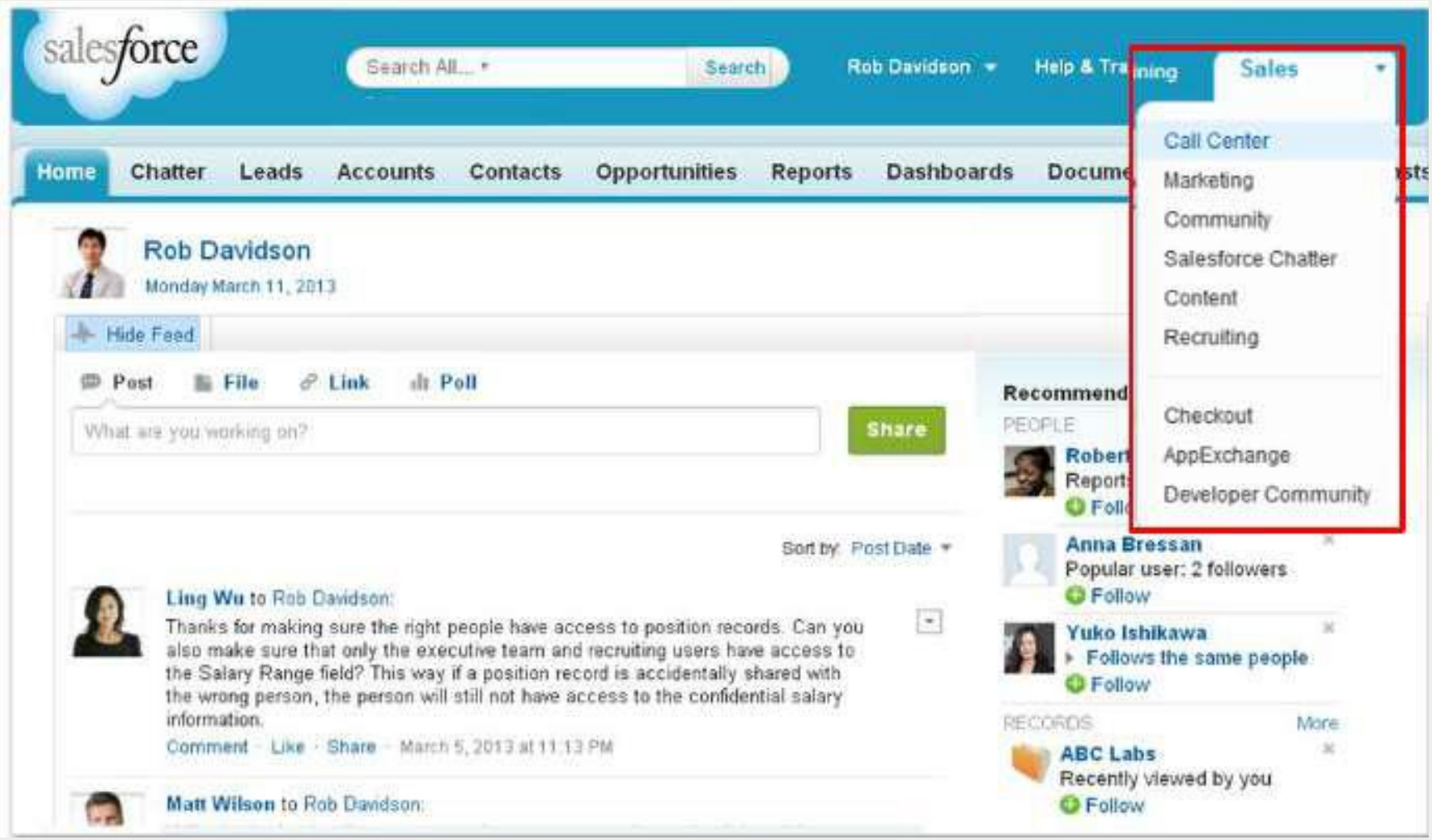
1.1: Salesforce Application
Salesforce Application



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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

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1.4: Standard Objects
Standard Objects

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1.4: Standard Objects
Standard Objects - Accounts

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1.4: Standard Objects
Standard Objects - Contacts

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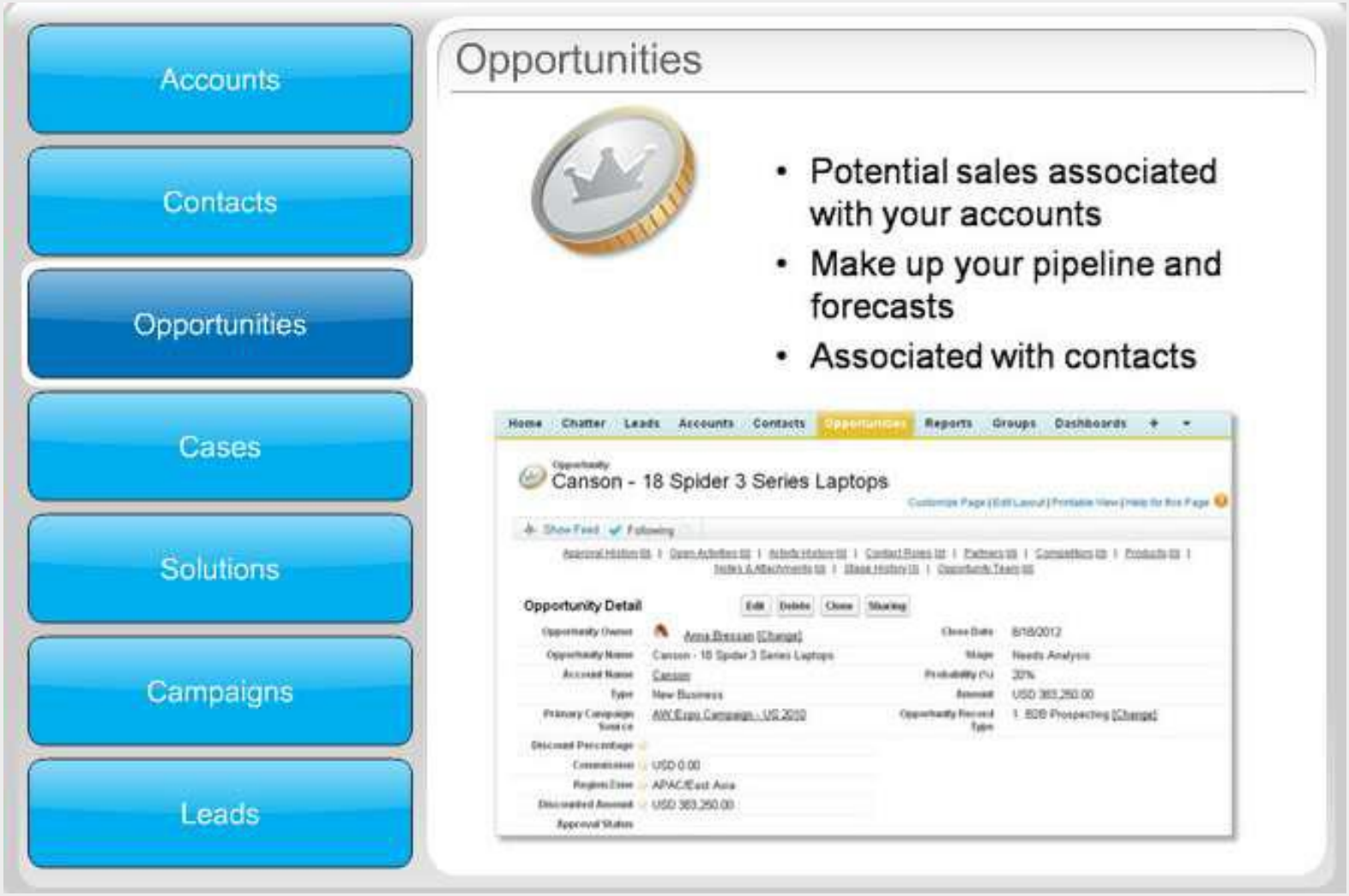
1.4: Standard Objects
Standard Objects - Opportunities



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1.4: Standard Objects
Standard Objects - Cases

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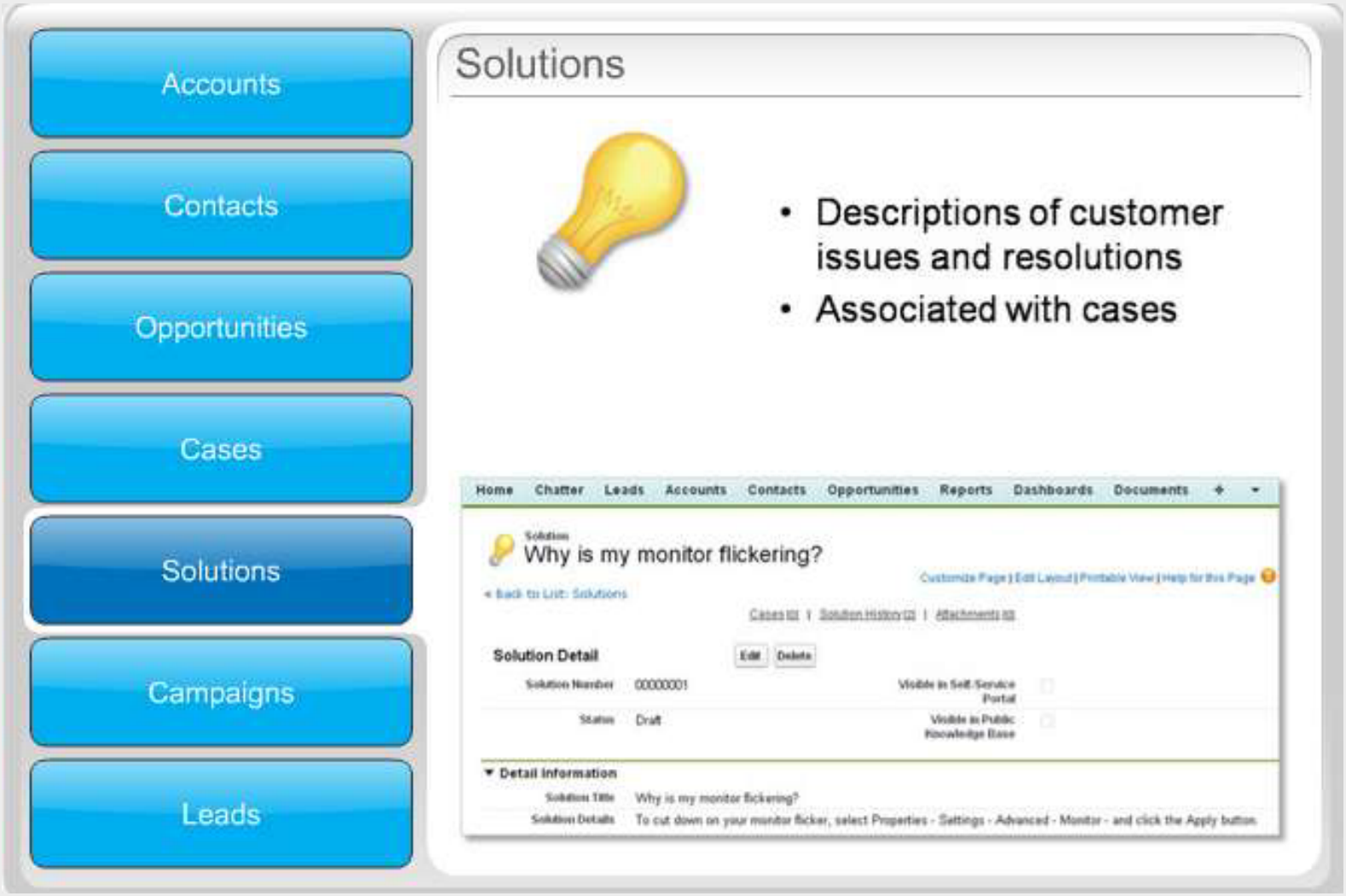
1.4: Standard Objects
Standard Objects - Solutions



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1.4: Standard Objects
Standard Objects - Campaigns

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1.4: Standard Objects
Standard Objects - Leads

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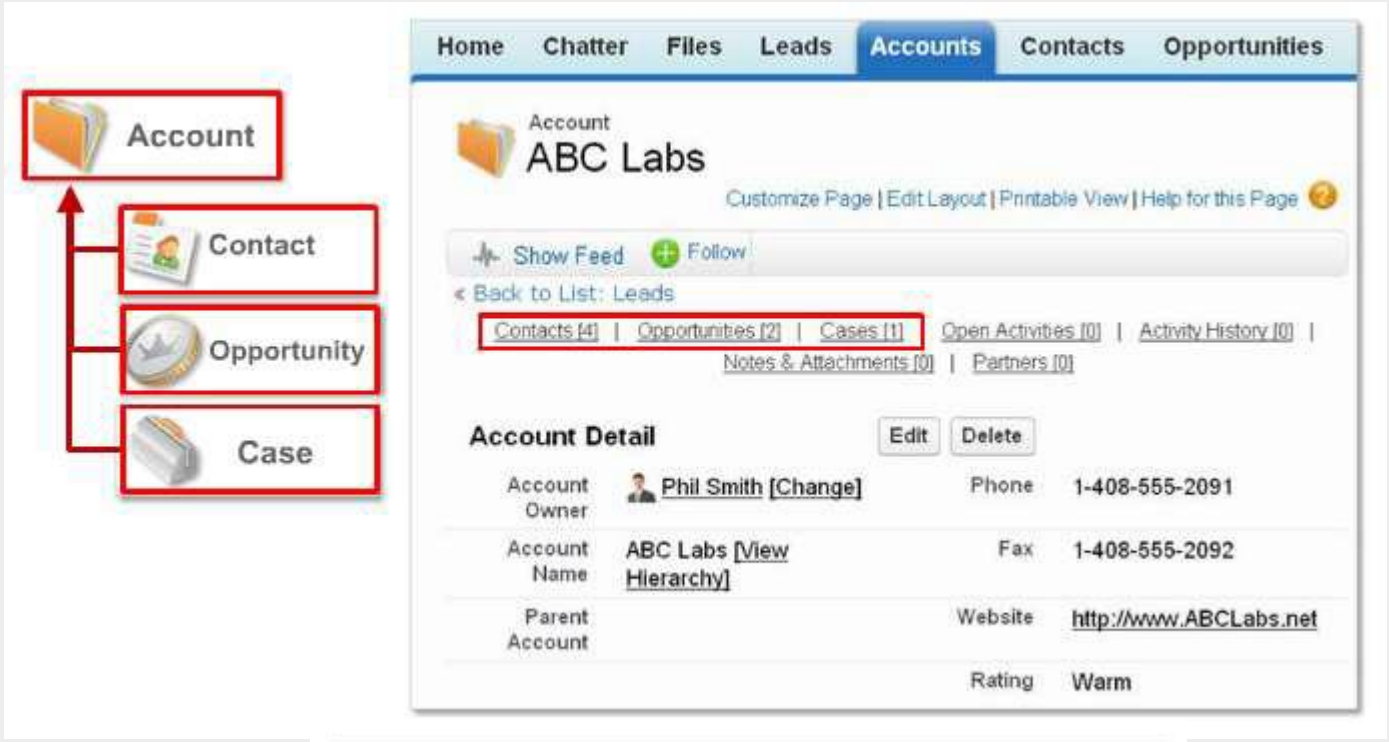
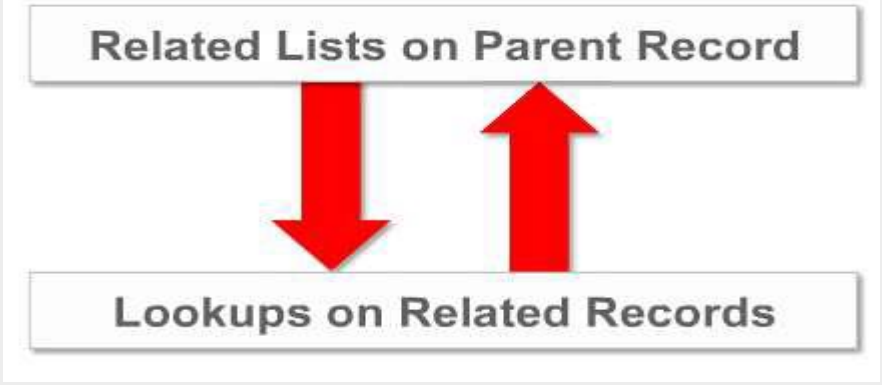
1.4: Salesforce Objects
Salesforce Object Relationships





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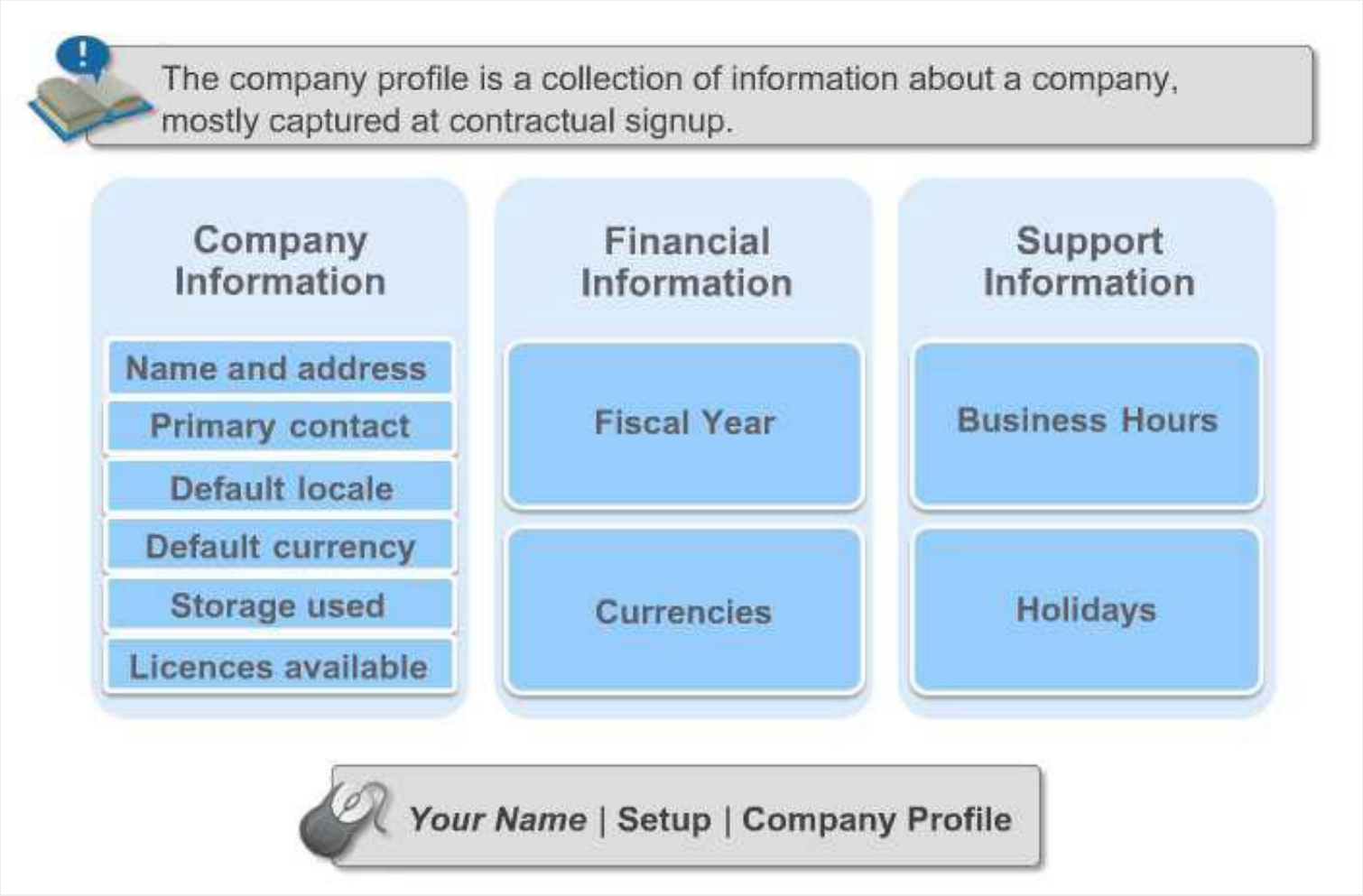
1.5: Organization Setup
Organization Setup

Company profile:



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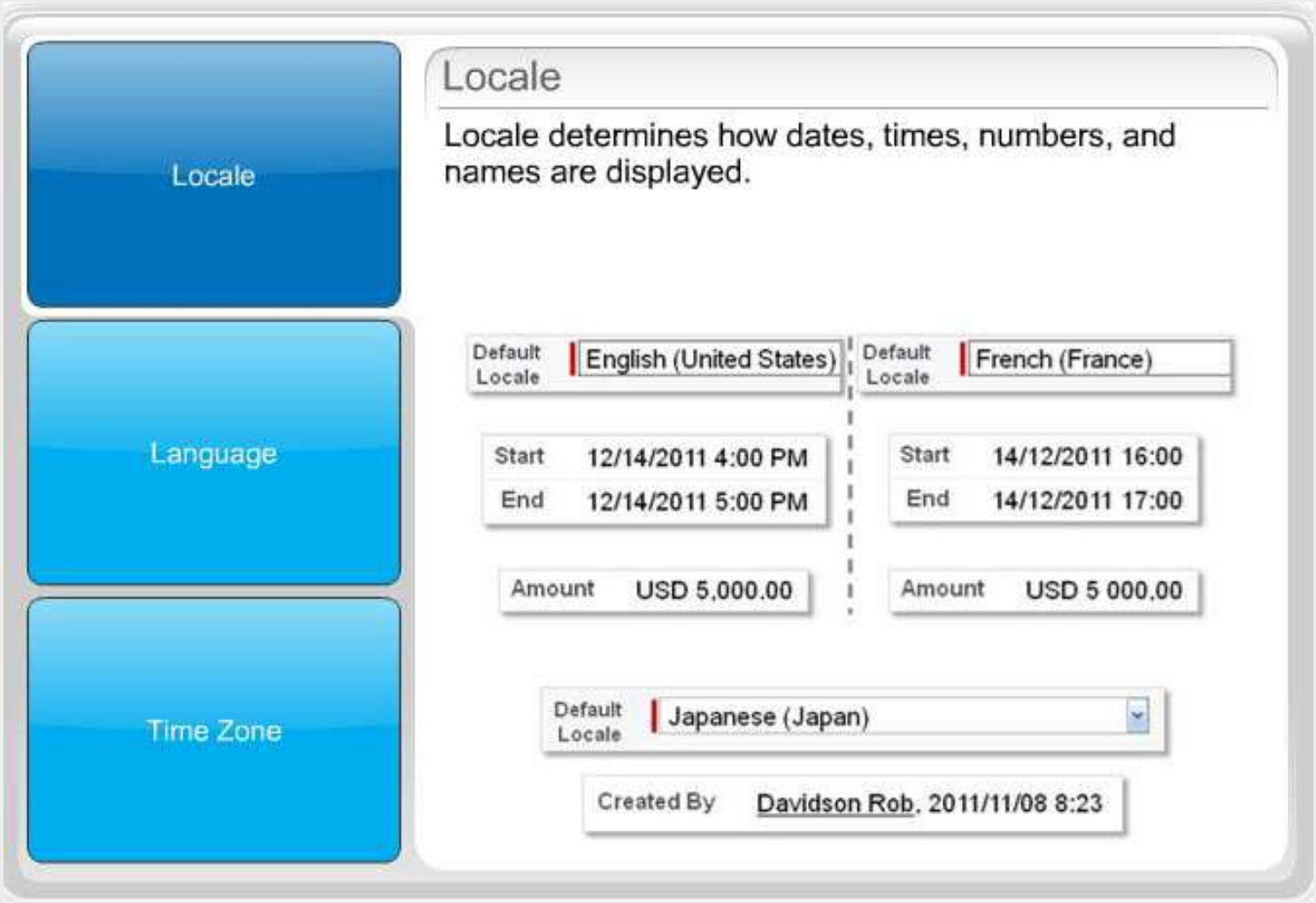
1.5: Organization Setup
Locale Settings



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1.5: Organization Setup
Locale Settings

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Locale Settings

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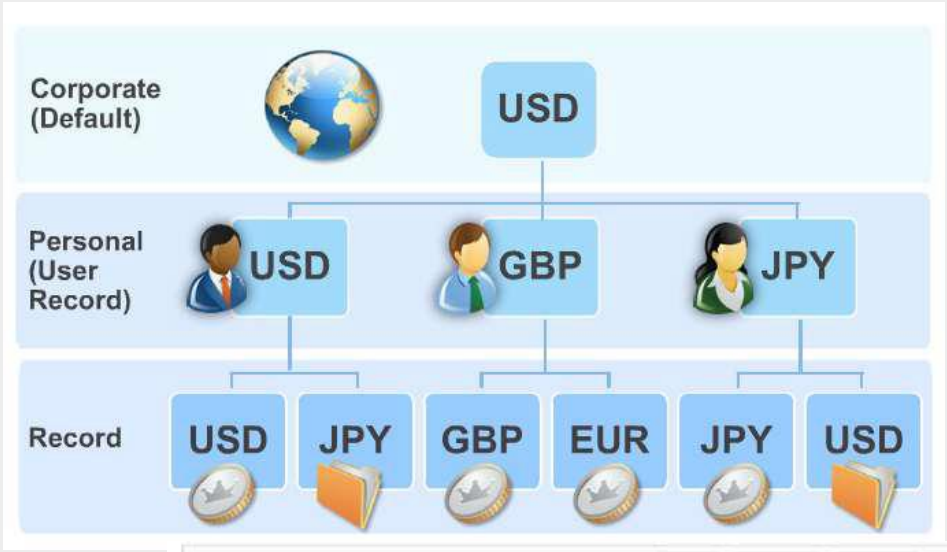
1.5: Organization Setup
Fiscal Year and Currency

Standard and Custom Fiscal Years

Working with Multiple currencies



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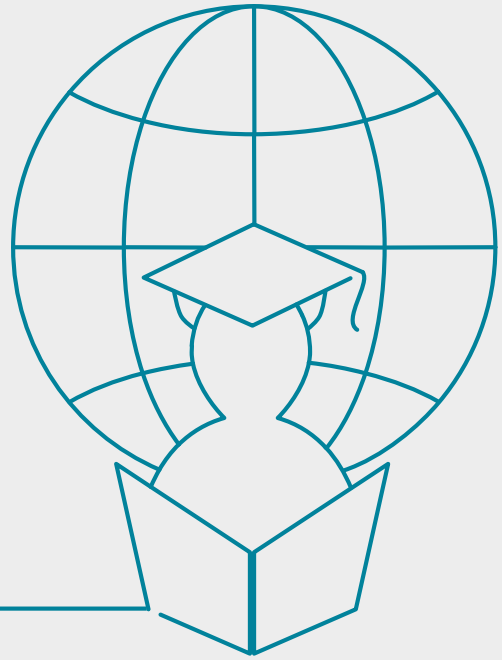
Summary

In this lesson, you have learnt:

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



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