**Salesforce Admin**

TTop Companies that use Salesforce today

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| --- | --- |
| **Company Name** | **Industry** |
| Aricent Group | Telcom |
| Aricent Inc | Telcom |
| BlueScope Steel | Manufacturing |
| KONE | Manufacturing |
| Cisco Systems Inc | Computers and Electronics |
| Motorola Inc | Telcom |
| Yamaha Corporation | Wholesale and Distribution |
| Allianz AG | Financial Services |
| Spherion Corporation | Business Services |
| P&H Mining Equipment | Manufacturing |
| Thomson Reuters Corporation | Financial Services |
| VTB Capital plc | Financial Services |
| Swiss Re Corporation | Financial Services |
| BNP Paribas Limited | Banking |

CRM, collection of databases, SaaS, PaaS, Org that provides software services…software that unites customers and org…multi tenant operation

Sales cloud >> Payment system >> Delivery system

Mulesoft – Purpose : To integrate with other systems.

**Key points to remember:**

* Runs on cloud
* Can be accessed via a browser and a stable internet connection
* Multi-tenant environment

**Learning environment setup:**

**Step 1:** [**https://trailhead.salesforce.com**](https://trailhead.salesforce.com) **– Use this to create a sample product instance for training and learning purpose**

**Step 2: Create a playground org**

**Company setup:**

**Terminologies used in SF eco system:**

* **Standard**
  + **Anything that’s is available inbuilt or out of the box**
* **Custom**
  + **Anything that you create as a developer or admin**
* **Tabs**
  + **Nothing but navigation menu links**
* **Object**
  + **Nothing but table in the database**
* **Org**
  + **Refers to an environment or an instance of Salesforce product**
  + **You can have a specific purpose (development, testing, production, training, learning) associated to an org**
* **Profile**
  + **A way to group users in the system**
  + **User – Profile mapping (1:1)**
  + **Can use profile to define user security / access in the org**
  + **WHAT USER CAN DO IN THE SYSTEM**

**Objects & Purpose**

|  |  |  |
| --- | --- | --- |
| **Type** | **Name** | **Purpose** |
| **Standard** | **Account** | **Meant to store customer information** |
|  |  |  |

**Org Users**

|  |  |
| --- | --- |
| **CEO** | **Mithran** |
| **Sales Manager** | **Malcom** |

**Use case #1:**

**As an admin, how can I modify the std. marketing app so that it will have ‘Account’ tab included:**

**Solution:**

* **Use app manager from setup**

**Use case #2:**

**CEO of travel hut has identified a Sales Manager named ‘Malcom’. You have been tasked to onboard the Sales Manager**

**Solution:**

* **From setup use ‘Users’ option**
* **‘Users’ feature will help to create and manage org. users**
* **Create Sales profile and add user to it**

**Use case #3:**

**Malcom has raised a concern that his UI is not very friendly . Also, he is not seeing Sales app for him to manages customers, contacts etc**

**Solution:**

* **Enable access to Lightning UI to the Sales profile**

**Use case #: 4**

**CEO of travel hut would like to ensure ‘Malcom’ is able to manage hotel partner customers and customer point of contacts & reports alone when logged into the system**

**Solution:**

* **Use app manager and create a new custom app**

**Open items:**

1. How do we import data?