Salesforce /startup

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Customer Master

Table used frequently but change of data is rare is called master table.

ex. customer master,, product master...

Customer Master : Transactional table holding customer information is called customer master.

In salesforce customer master is divided into TWO parts.

1. **Compony Account (Account)**
2. **Person Account (Contacts)**

Marketing

any pre sale of product is called as marketing.

Elements of Marketing

1. Campaign

Any targeted marketing effort is called campaign. Campaign are TWO types.

- Direct Campaign - campaign where customer are involved directly (countable)

  ex, demo class, survey, phone down, sample distribution...

- Indirect Campaign - campaign where customer are NOT involved indirectly (assumption)

  ex, banner, TV adds, poster, newspaper adds...

2. Lead

any inquiry come to business is called lead. lead is an collection of suspect or prospect. (good or bad)

Characteristic of Marketing

- Brand Awareness / Product promotion
- Product Penetration
- customer acquisition
- Customer Retention

> NOTE : In salesforce typically we use Direct Campaign because we can't promote physical banner or poster etc.

How to Name any campaign.

FY25_Q4_Cloud Computing

FY25 Stand for Fiscal Year for individual / Financial Year for the government.

Q4 Stand for Quadra.

Sales Cloud

The process of exchange of a product or services in return of a value is called Sales.

Element of Sales

1. Opportunities
2. Product
3. Price Book
4. Quote
5. Notation
6. Order
7. Contract
8. Invoice

Defaults Pipeline :

1. Prospecting - 10%
2. Qualification - 10%
3. Needs Analysis - 20%
4. Value Proposition - 50%
5. Identifying Design Makers - 60%
6. Perception Analysis - 70%
7. Proposal Price Quote - 75%
8. Negotiation Review - 90%
9. Won - 100%
10. Loss - 0%

Sales Pipeline :

Stages follows during a sales process is called sales pipeline.

Product

any services available for sale is called as Product.

Price Book

pricing strategy to focus a product to a multiple price range is called price book. (CPQ)

Opportunities

any prospective deal are called Opportunities.

Quote

any propose offer of an product and price is called Quote.

1. Quote Activation -

> Setup → Setup → Feature Setting → Sales →Quote → Quote Setting → Click Enable → Check Four Layout Box → Save

Order

any excepted quotation is called Order.

Contract

any agreement, terms & condition or memorandum of understanding is called Contract.

> Q : create 10 contract, 10 contact, 10 orders

Invoice / Billing : the making of bill is known as billing....

Service

any post sale inquiry is called Service

Service Element in Salesforce :

1. Case

any feedback problem or grievances are called Cases.

Knowledge Base ARTICALS (Solution)

Resolution of a problem is called Solution or also known as KB Articles.

Solution is available in classic.

> web Lead : The case or problem arise through the website or form, web email is an complain arise through email is known as web email.

Administration /Salesforce.

User Administration

1. User Access Request (Role Change, Access Change)
2. Password Reset

3. User Activation and Deactivation

4. Expectation (Special Permission)

Salesforce License

1. Salesforce $\rightarrow$ 2 users

2. Salesforce Platform $\rightarrow$ 2 users

3. Force . com $\rightarrow$ 2 users

> NOTE : password of any user is only same as before if the user comeback within 90 Days.

Profile

Salesforce object control access and privileges are called Profile.

Characteristics of Profile :

- By default 37 profile in salesforce.

- Profile are license depended.

- One user can assign with one profile only where as one profile can be assign to multiple users.

- Profile can not created but can be copied.

Salesforce Security Flow

1. License
2. Permission Set
3. OWD (Organization Wide Default)
4. Profile   → App / Sol lev.
5. Delegated Admin   → Tab
6. Roles   → Object
7. Group   → Field
8. Queue   → Record

Permission Set

any exception against a profile in a positive direction is called Permission Set.

- Permission Set are profile independent and user dependent
- Multiple permission set can assign to one user.
- Collection of Permission Set is called permission set group.
- Permission are not time dependent. Need to add or remove manually

Roles

position of an user in organization hierarchy is called Roles.

- Territory based
- Product based
- Company size based

Uses of Roles

- Creating Group

- Creating Queue

- Escalation Role

- Delegated Admin

Product Master

Master table containing product information with product hierarchy is called Product Master.

Public Group

Set of users are called public group also known as Team.

Queues

Queues are shared folders or location (department) used to manage work efficiently.

Data Management

Data Uploads and Downloads

- Data Loaders   → CSV / TEXT

- MuleSoft Data Loaders I.O   → CSV / TXT

- Workbench → CSV / TXT , XML

- Wizard   → CSV / TXT

- REST / SOAP API → JSON, XML, CSV / TXT

- APEX → JSON, XML, CSV / TXT

- DATABASE $\rightarrow$ DB FROMAT

- Third party data tool. $\rightarrow$ undefine.

Universal Data Exchange Format

- CSV / TEXT

- XML

- JSON

File Validation Rules

- No two header can have same Name.

- Headers can't be blanked

- Avoid special characters in headers don't allowed special symbol.

> NOTE : To connect Developer Loader first go to settings—>my personal information→ Rest my Security Token.

Mapping Rules

- Both source and destination should have same data type.

- Size of the destination should be greater than or equal to source.

- Destination can be targeted only once where as a source can have multiple destination subject to rule **1** and **2**.

Mule Software

Mule software application is to perform bulk uploads and downloads.

Difference between Data Loaders.

Data Loader	Data Loader IO	Workbench	Wizard
Installation required	Cloud	Cloud	Cloud
Security token required	Cloud login	Cloud login	Cloud login
Max 50,000	Max Unlimited	Max Unlimited	Max 50,000
Input CSV	Input CSV	Input CSV, XML	Input CSV
Output CSV	Output CSV	Output CSV, XML	Output CSV
Logs on Local machine.	Logs on IO.	Inside Salesforce	inside Salesforce
Instant Upload / Download	Schedule + instant Upload / Download	Instant Upload / download	Instant Upload / Download
File upload only	File + Drop Box + FTP	File + Drop Box + FTP + DB	File upload only.
FREE	PAID	FREE	FREE
1 to 1 Mapping	1 to 1 Mapping	1 to Many Mapping	1 to Many Mapping
All object supported	All object supported	All object supported	Only 5 + Custom object (accounts, leads, contacts, solution, campaign)

Duplicate Management

Managing duplicate and action based on a

- Matching Roles
- Duplicate Roles

Duplicate management is supported in four system object only.

- Contact
- Account
- Lead
- individual (user)

> NOTE : Create a duplicate role in Lead where mobile and email match. AND duplicated rule comparing Lead to Contact on mobile and Email match block lead creation.

Mass Deletion

 Account can't be deleted if a account is link to

- Case link
- Partner
- Contract link

Secure Agent

secure agent is an person which will transfer the data from salesforce to another third party data.

> trus.salesforce.com → for checking servers present in salesforce. │ click on trust status.
> CS → Sandbox

Reports

Any information or data in a prescribe manner is called Reports.

Types of Reports

- Tabular Reports

- Summary Reports.

- Matrix Reports

- Join Reports

Tabular Reports

Report with basic row and column are called Tabular Reports

- Consist of rows and column

- Grant total is available

- can't be use making dashboard or charts.

- can't be used for grouping

- Schedule can be done.

Summary Reports

Reports containing row and column with grouping at row level is called summary reports.

- Grouping at row level

- Maximum 3 grouping.

- Graph and Dashboards can be created.

- Total sub total is available.
- Schedule can be done.

Multiple values plotting

- Summarization - that includes sum, average, max and min. (**MAX 4**)
- By Grouping - (**MAX 3**)

Multiple Values Charts

- Bar
- Lines
- Scatter

Matrix Reports

Complex reports with grouping at row and column with grid of summary is called Matrix Report.

- Grouping at row and column
- Max 2 groping at row to a column (MAX 4)
- Grid appears with summary data. Pushed towards right side.
- Grand Total, Sub Total, Block Total appears.
- Schedule can be done.

> NOTE : The can only be send towards right side of matrix.

Joined Report

Joining one or more report (multiple object) is called Join Report.

- One or more table data extraction is possible.

- Three level sub group is allowed at row level.

- Can't be schedule.

- Graph and Charts are allowed.

Dashboard

Representation of the charts is called Dashboards.

> In Dashboard we can only display Matrix and Summary Report.

Salesforce /Development

To create a table use the following terminology

Patient Registration No. : AH-{00000}-{MM}{YYYY}

example, AH-00001-052024, AH-00002-052024

> Note : Patient__c → means the table is created with name Patient by the developer its just a representation and system will automatically add __c for the understanding purpose.

Salesforce Customization (non - programming development)

App (project / solution)

Collection of taps with a common requirement is called App.

- Classic app
- Lightning app
- Connecting app

Object (Backend table)

Backend table used for storing data is called object.

- Standard object - salesforce out of box system tables. eg, user, contact, leads, account
- Custom object - developer define tables and custom object is always end with suffix **c eg, patient__c, payment__c, passenger__c.**

Tabs

Representation of an element in salesforce frontend is called Tabs.

- Object tab
- force tab
- web tab
- lighting component
- lighting page / application tab

Page layout

Representation of a field in a desire format is called Page layout. Default page layout is always of object name space layout.

Record Type

picklist value to assign multiple layout for a single profile is called Record.

Search layout

Display of a data at multiple locations in tabular format is called Search Layout.

Field Depended

- Master Field (parent / controlling) - Master field should be **checkbox** or **single picklist.**
- Child Field (depended) - child field single picklist or multi picklist

> NOTE : =IF(A2>=90,"Good Patient",IF(AND(A2>=70,A2<90),"Noraml Patient",IF(AND(A2>=50,A2<70),"Average Patient","Critical Patient")))

YEAR(TODAY ()) - YEAR (Registration_Date__c)

| NOTE : You have to create a field name and type of data and also the state name if the its TS than total would be GST + Amount.

Relationships

Connecting one more object is called Relationship.

- Master Detail
- Lookup
- Junction
- External
- Hierarchal

Master Detail (Cascading, Parental)

Relationship where any action taken on the parent object is passed to child object is called master detail relationship

Characteristics

- Maximum Two master detail can be created.
- Child object should not contain any record.
- Rollup summary activates in parent.
- Supports one to one (**1:1**, **1:N**, **N:1**)

Lookup Relationship

Relationship where any action taken on parent object don't pass to child is called Lookup Relationship.

Characteristics

- Lookup relationship supports (**1:1, 1:N, N:1**)
- Max of 40 relationship can be created (total relationship in object is 40)
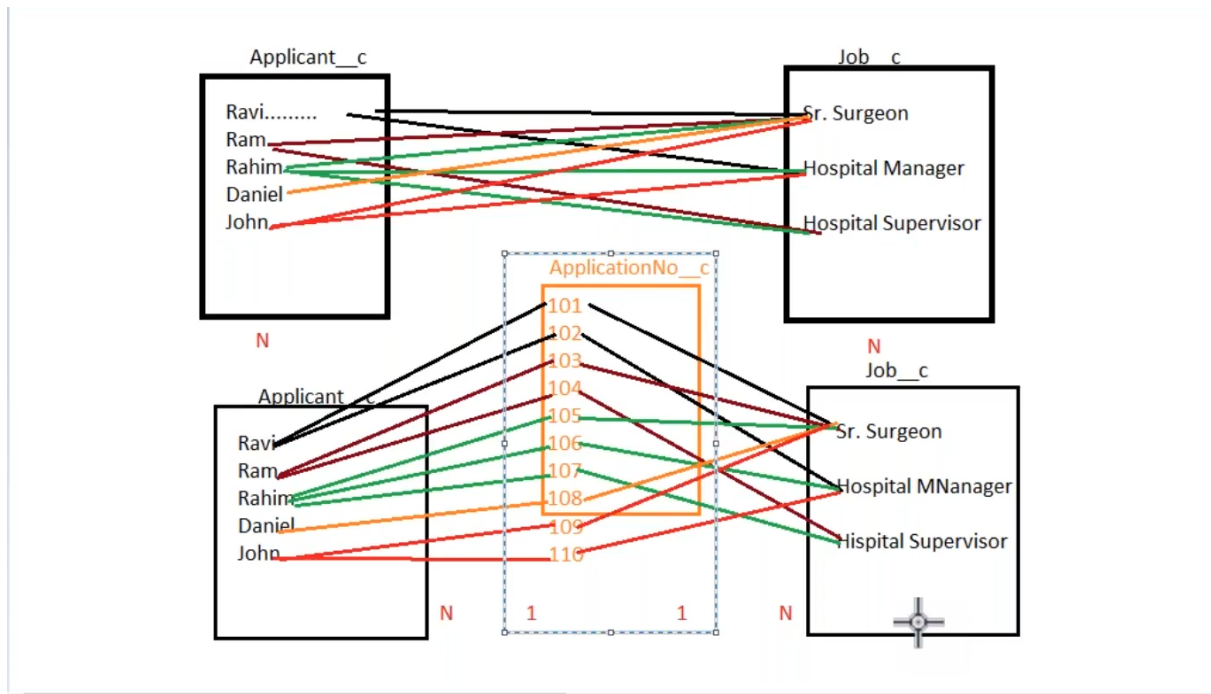- Restrict delete option available in lookup
- Unlink child record is allowed

Junction Relationship

Connecting one or more object with many to many relationship by introducing intermediate invisible object is called Junction Relationship.

Properties :

- Junction relation supports N:N Relationship
- Junction relation always used invisible object.
- Junction is always corrected with master detail relationship.

- Junction always support 2 objects as a single instants.

- Junction object should always have auto numbering.

- junction are always invisible without tab.

Hierarchical Relationship

Self connection of an object with in itself is called Hierarchical Relationship.

External Lookup Relationship

Relationship that allows salesforce object to a external data table to link external data table outside the Salesforce.com org is called External Lookup Relationship.

Properties :

- Additional adapter / connection manager is required.

Automation

System control process without any manual intervention based on condition is called Automation also known as robotic process (machine control).

Automation Tools in Salesforce

- Approval Builder
- Workflow Builder
- Flow Builder
- Process Builder
- Notification Builder
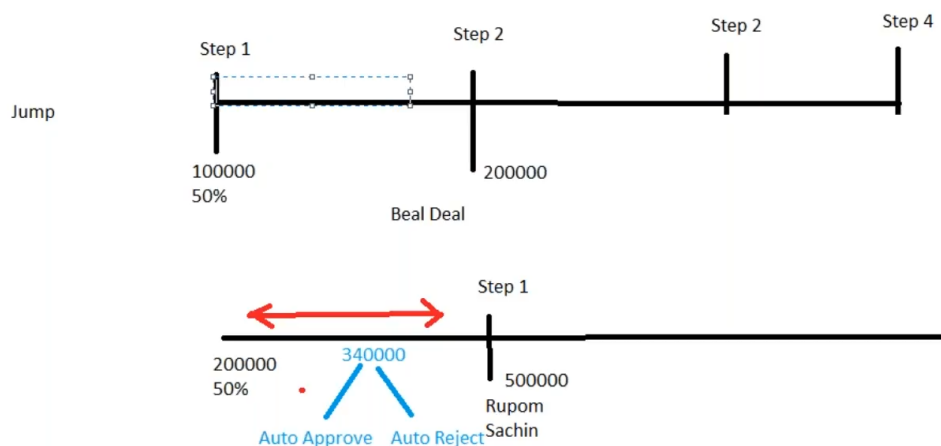- Rule Builder

Approval Builder

Process of endorsement by department or a user is called Approval. Building of approval flow is called Approval Flow is called Approval Builder.

- Jump Wizard (Quick / Easy)
- Standard Wizard (Detail / In-depth)

Standard vs Jump

- Standard wizard approval rights to approval where as jump wizard

- Standard wizard editor right to approval where as jump wizard only to administrator.

- Additional details of a data on approval page can be configured in standard wizard where as in Jump we can't.

- Mobile approval is possible with standard wizard where as in Jump wizard only windows.

- In standard submitter can be selected in jump only the owner can only submit.

- Customization of recall procedure is available in standard where as in Jump is not available.

- Approval step is to be created speared in standard in Jump is automatically created.

Workflow Builder

Executing of an action based on a condition and criteria is called workflow.