Contents



- 1. What is Salesforce
- 2. How Salesforce store your data
- 3. Salesforce Objects
- 4. Salesforce UI Navigation
- Search
- App Launcher
- List View
- List View Controls
- List Display
- Filters
- Inline Editing
- SetUp
- Global Actions

Market Company of the Company of the

What is Salesforce?



- Salesforce is a CRM (Customer Relationship Management) tool.
- Manage relationships with your customers and prospects and track data related to all your interactions.
- Helps teams collaborate, both internally and externally, track important metrics, and communicate via email, phone,
 social, and other channels

Benefits?

- Salesforce is a cloud-based solution that is secure, easy to use and accessible anywhere.
- You can easily manage and track all of your leads, contacts, opportunities and accounts.
- You can customize (create custom Apps, objects, fields, reports etc.) the platform for your business needs.

THE PERSON NAMED IN THE PARTY OF THE PARTY O

Salesforce has an extensive app store that makes it easy to add tools for your business.

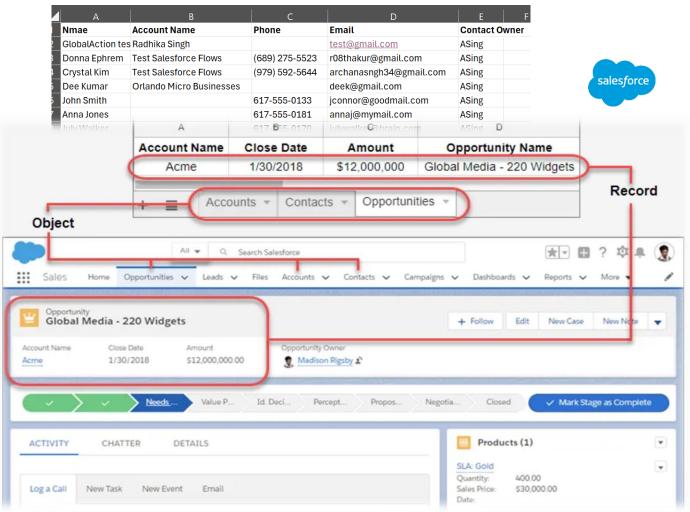
How Salesforce Store Your Data?

- Salesforce organizes your data into objects and records.
- You can think of objects like a tab on a spreadsheet, record like a single row of data and fields like columns in the sheet.
- Fields are used to store the data and hence each field has a data type associated with it.

Basic Terminology

- Object: A table in the database; in spreadsheet example, an object is a tab on the spreadsheet
- Record: An item you're tracking in your database; if your data is like a spreadsheet, then a record is a row on the spreadsheet
- Field: A place where you store a value, like a name or address; using our spreadsheet example, a field would be a column on the spreadsheet.
- App: A set of fields, objects, permissions, and functionality to support a business process
- Org: Short for "organization," the place where all your data, configuration, and customization lives.

 You and your users log in to access it. You might also hear this called "your instance of Salesforce"

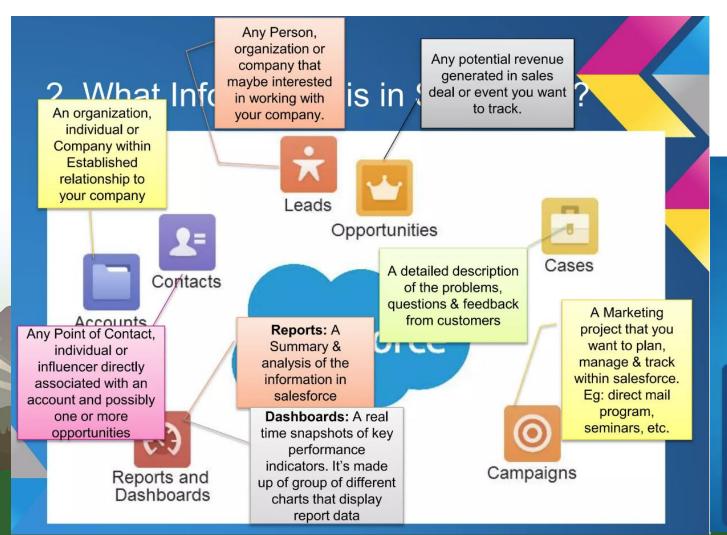


Salesforce Objects:



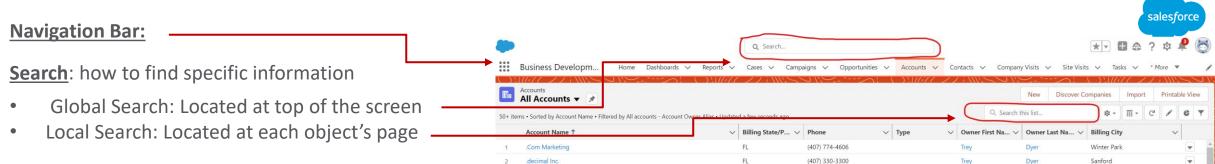
Standard: Objects that are included with Salesforce. Common business objects like Account, Contact, Lead, and Opportunity are all standard objects.

Custom: Objects that you create to store information that's specific to your company or industry.



Process Flow:





Steps

- Click in search box, the instant results are your recent items.
- As you type, the list updates with suggested matches and search options.
- If you don't see the record, press Enter to see the full search results.
- The Top Results page shows the best matches for objects you use most.
- To see results for a specific object, click the object's name in the sidebar.
- If you don't see an object listed under Search Results, select Show More.
- Searchable objects are listed alphabetically.





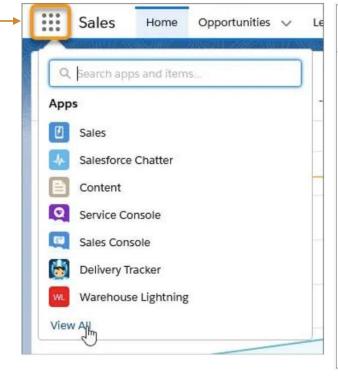
✓ Pr... ✓ Owner Full... ✓

Inactive User

App Launcher: If you ever need to change which app you're viewing, you can just click the App Launcher icon,

then choose an app such as Sales.

- All Apps shows your custom, standard, Lightning Experience, and connected apps in one place.
- 2) All Items shows the home page, the feed, tasks, events, objects, custom tab types, and more.
- 3) You can search for apps, objects, and other resources by name.
- Authorized users can go directly to the AppExchange in one click, without leaving Lightning Experience.
 - List Views
- 2. List View Controls
- 3. List Display
- 4. Refresh
- 5. Inline Editing
- 6. Charts
- 7. Filters
- 8. View Profile
- 9. Notifications 10. SetUp 11. Global Actions



List Views

50+ items • Sorted by Opportunity Name • Filtered by All opportunities • Updated a few seconds ago

All Opportunities ▼

Opportunity Name ↑

"Bobblehead

Q Search..

✓ Account Name

Full Sail University

Full Sail University

Opportunities V

✓ Amount

\$0.00

\$0.00

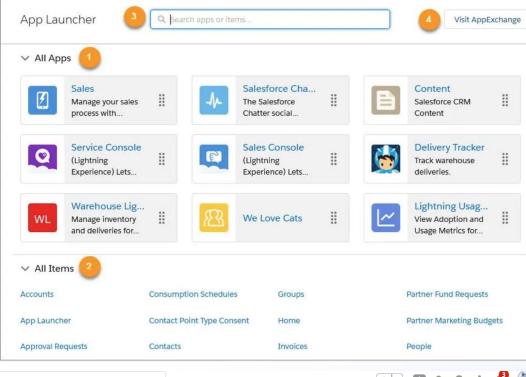
Close Date

2/29/2016

2/29/2016

Stage

Closed Lost



Q Search this list...

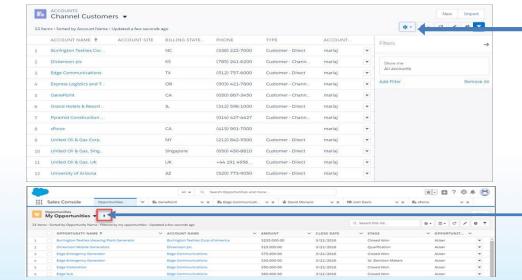
Pr... V Type

100%

List View:

Steps

- 1. Every Object you access from the **Navigation Bar** at the top will bring you to a list view.
- 2. List views help display your frequently viewed records more quickly than a report.
- 3. They are for updating frequent or many fields through Inline Editing.
- Your default list view will be Recently Viewed, but you can Pin your favorite and swap between them at any time.
- You can also create your own list view, by clicking the gear icon and selecting Clone.
- 6. You can apply filters to your own list views and search within them. \lnot



ii. Object List View

- It allows you to quickly view a specific set of records and some of the data associated with those records.
- Within the list you can sort by the columns, follow records, Edit records or Print List.
- It allows greater degree of accuracy than global search



salesforce

List View Controls:

Create New List View

- 1. Click on new from list view controls drop down
- 2. Enter list name, click on API name, select who can see the list and click save
- 3. Adjust filters per your requirements

Clone List View:

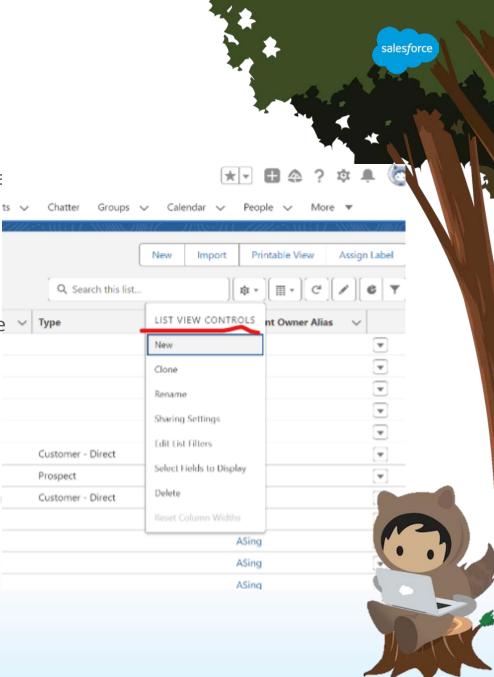
- 1. Click on clone from list view controls drop down
- 2. Enter list name, click on API name, select who can see the list and click save
- 3. Adjust filters per your requirements

Rename List View:

- 1. Click on rename from list view controls drop down
- Enter suitable list name and click save

Change sharing settings of List View:

- 1. Click on sharing settings from list view controls drop down
- 2. Select the suitable sharing setting and click save



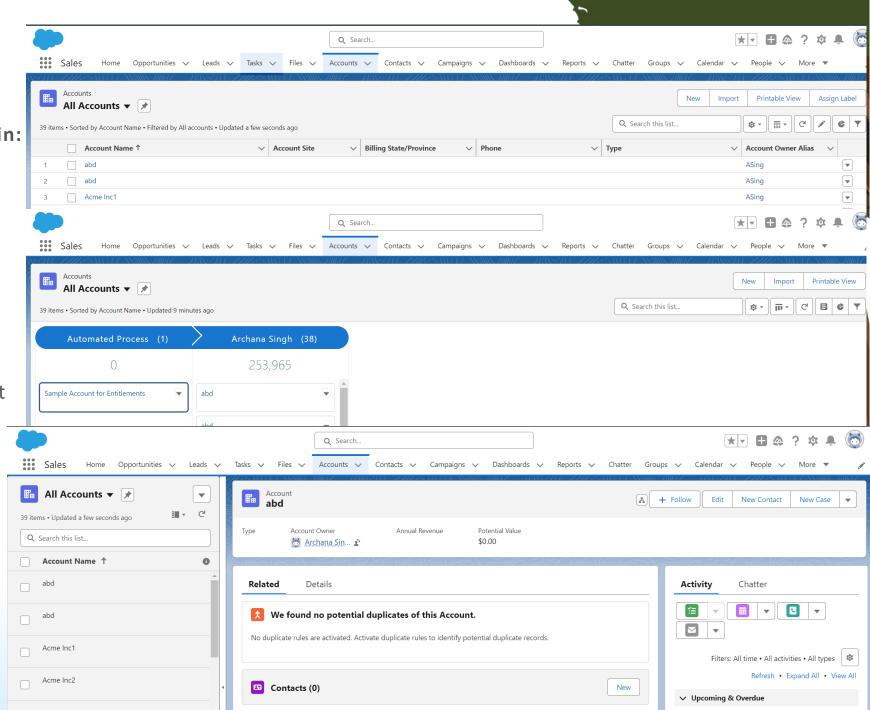
Display List View:

List Display allows you to display list in:

- 1. Table format
- 2. Kanban View
- 3. Split View

Filters:

- 1. You can see filters applied to a list view by clicking on filter icon.
- 2. You can apply filters to your own list views and search within them



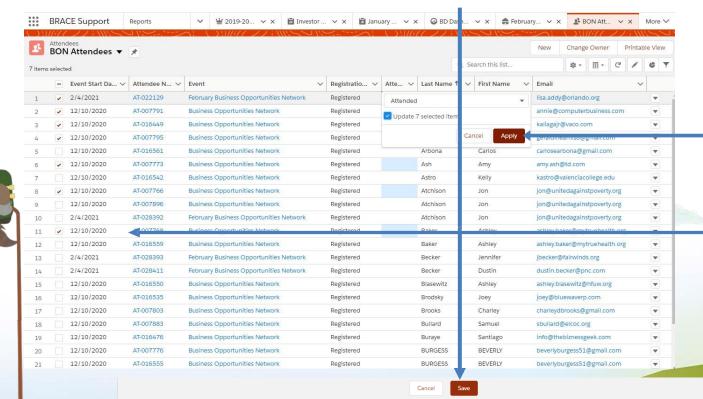
Inline edit: Editing Multiple Records at Once with List Views

Steps

1. From an open List View with a field, you want to edit (see previous page), check off all the records you want to update (up to 200 at a time).

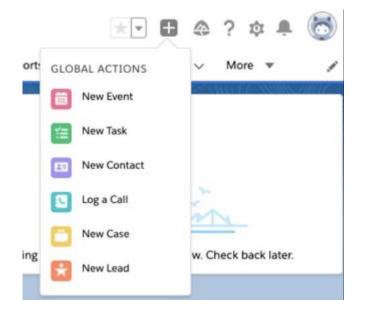
Hover over the field in the column and you'll see a pencil icon appear. Click it, choose —
the relevant field value, and click "Update X selected items" and "Apply."—

3. Then click "Save" at the bottom of the page.





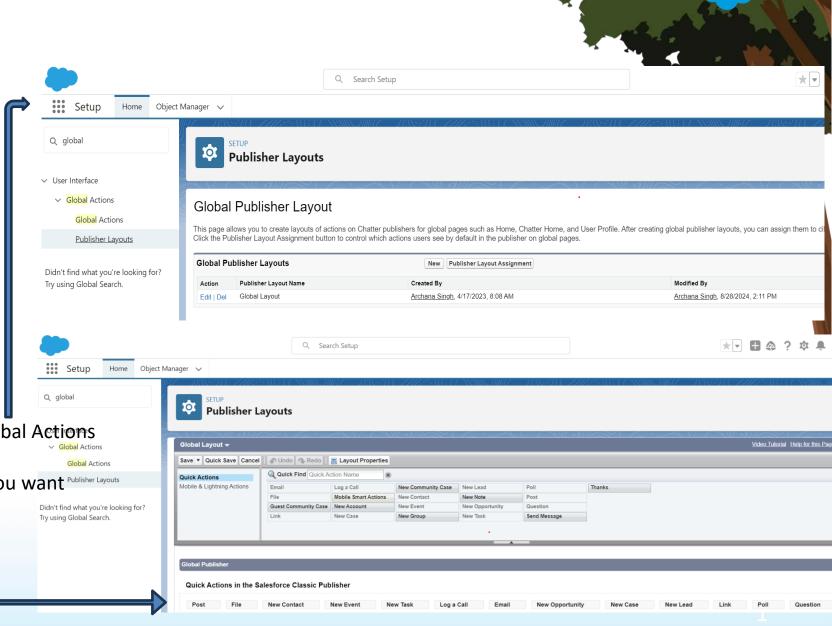
Global Actions:



Reorder the sequence OF Global Actions:

Steps:

- Go Setup and in home tab search for Global Actions
- 2. Click on publisher layout
- 3. Click Edit and reorder the sequence as you want Publisher Layouts
- 4. Click save



salesforce

