

CRM顧客關係管理系統Salesforce



級別：初級
講師：福別問

為何Salesforce重要

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104人力銀行



salesforce

× | 地區

▽ | 職務類別

搜尋

☐ 只搜尋職務名稱 相關搜尋：CRM、marketing、B2B、Cloud、SaaS

☐ 切換高階職類

職務 公司

更新日期 ▾ 出勤制度 ▾ 薪資待遇 ▾ 經歷要求 ▾ 公司相關 ▾ 更多條件 ▾ 排除條件 ▾

🗑 清空條件 | 🔔 檢視或訂閱條件

全部(235) 全職(223) 兼職(2) 高階(3) 其他 ▾ 第 1 / 12 頁 ▾ 符合度排序 ▾

10/04 CRM project(Salesforce) Engineer

遠東金士頓科技股份有限公司 | 電腦及其週邊設備製造業

新竹市 | 經歷不拘 | 大學

金士頓科技股份有限公司，作為全球行業領先的企業，正在招募經驗豐富的CRM project(Salesforce) Engineer，期待您的加入！職務內容：1. 撰寫需求與設計文件
2. 程式開發設計與實作 3. 施行專案品質計畫相

待遇面議 外商公司 員工1000人

★ 儲存

✉ 應徵

0~5人應徵

10/04 Business Analyst – Salesforce (Taipei Office)

香港商捷比達有限公司台灣分公司 | 其他商品批發業

台北市中正區 | 3年以上 | 大學

★ 儲存

✉ 應徵

強力放送

公司氛圍很好，我要匿名分享(曾)任職公司



📄 新版介紹

為何要有人帶

Salesforce for Beginners


A step-by-step guide to creating, managing, and automating sales and marketing processes




Packt
www.packt.com

書跟不上變化。自學很難，有人教就很簡單

為何要用英文介面

 developers


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(54445)

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[Custom Lightning Component failing to load intermittently](#)

Hello - we're new to Salesforce and had a consulting company assist us in implementation, building custom components going live. We're having an issue for almost a year with a custom component with no assistance from consulting company and was told by SF support to post this lightning component question on the dev forum. I am not an SF admin or dev, b

November 9, 2022 [Like 0](#) [Follow](#)

[How to upload excel and csv file \(both\) using Aura component](#)

I need a urgent solution for below requirement:-

I am newbie in Aura and need to create a component for excel file upload where file is containing either single or multi

November 9, 2022 [Like 0](#) [Follow](#)

英文是基本能力，論壇與解答都是英文

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FEEDBACK

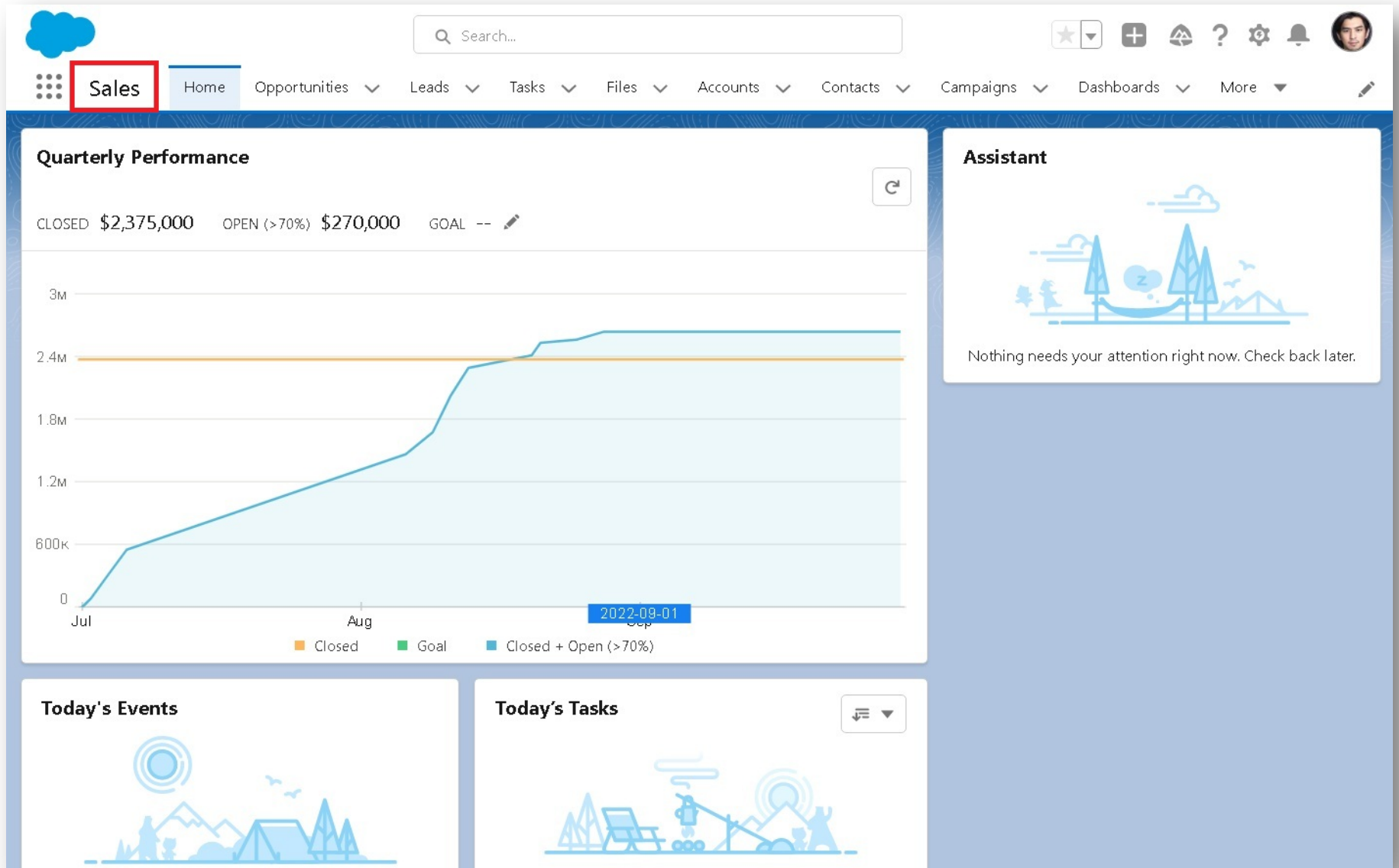
註冊帳號

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar labeled 'Search Setup' and a user profile icon. Below the navigation bar, the 'Home' tab is selected. The left sidebar contains a 'Quick Find' search bar and a list of setup categories: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, New Salesforce Mobile App QuickStart, Lightning Usage, Optimizer, ADMINISTRATION (with sub-items Users, Data, Email), PLATFORM TOOLS (with sub-items Apps, Feature Settings, Slack, Einstein), and a 'Create' button. The main content area displays three featured cards: 'Get Started with Einstein Bots' (Launch an AI-powered bot to automate your digital connections), 'Mobile Publisher' (Use the Mobile Publisher to create your own branded mobile app), and 'Real-time Collaborative Docs' (Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce). Each card has a 'Get Started' button. Below these cards is a section titled 'Most Recently Used' with 8 items. The first two items are listed in a table:


NAME	TYPE	OBJECT
Lee	User	
Testname	User	

<https://developer.salesforce.com/signup>

切换到Sales模式




更換頭貼





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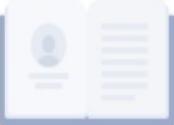


Sales Home Opportunities ▾ Leads ▾ Tasks ▾ Files ▾ Accounts ▾ Contacts ▾ Campaigns ▾ People ▾ More ▾




Jay Chang


Edit User Detail



Share your awesomeness with the world.
(Or at least with your colleagues on Chatter.)



Learn new skills on Trailhead, the fun way to learn Salesforce.

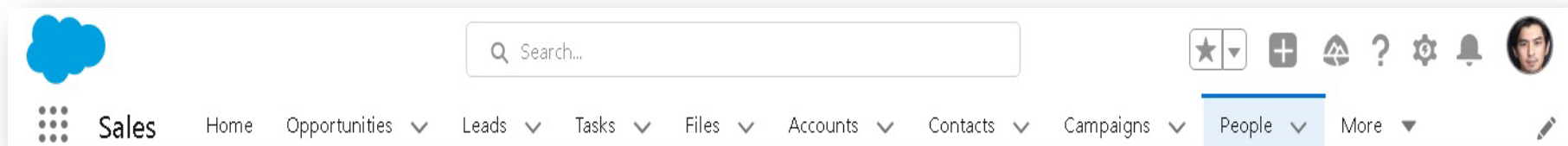


Connect with fellow Trailblazers on the Trailblazer Community.

Details

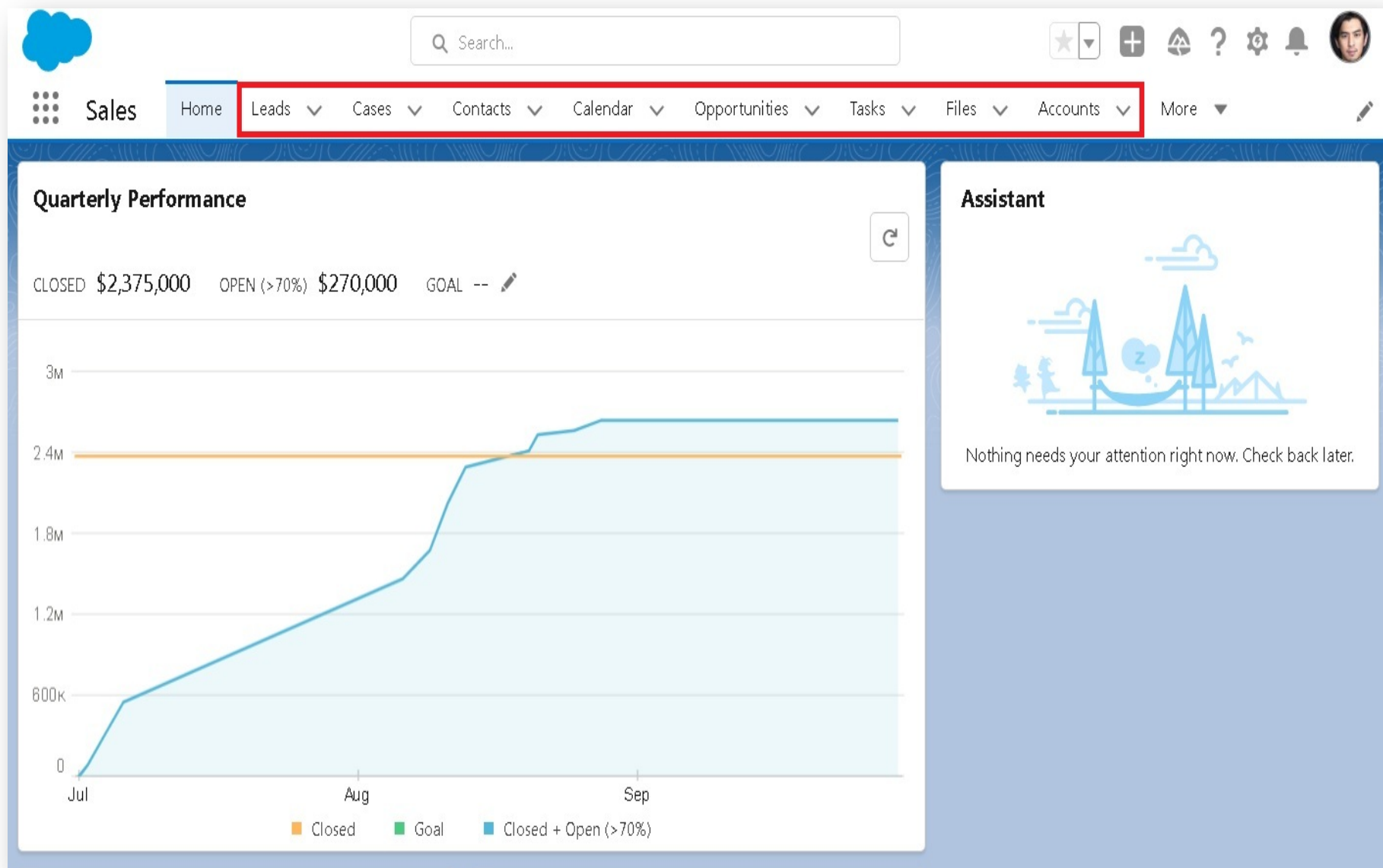
Related

名詞解釋




標籤	官方翻譯	更貼切的翻譯
Home	首頁	
Opportunities	機會	進一步的商機
Leads	商機	一開始的商機
Tasks	工作	任務
Files	檔案	
Accounts	帳戶	公司
Contacts	連絡人	
Campaigns	活動	
Dashboards	顯示面板	
Cases	個案	客戶意見








排序標籤




機會與報價單



Search...



SalesHomeLeads ▾Cases ▾Contacts ▾Calendar ▾Opportunities ▾Tasks ▾Files ▾Accounts ▾More ▾

 Opportunity
Subway-

[+ Follow](#)[New Case](#)[New Note](#)[Clone](#) ▾

Amount: \$100,000.00

Probability ... 75%

Expected R... \$75,000.00

Close Date: 9/30/2022

Last Modifi... [Jay Chang](#)

Last Modifi... 10/3/2022, 12:37 AM

Stage: Proposal/Price Quote

Amount: \$0.00

Probability ... 75%


Expected R...

Close Date: 9/30/2022

Last Modifi... [Jay Chang](#)


Last Modifi... 10/3/2022, 12:36 AM

[View All](#)

 **Quotes (0)**

▾

生成紙本報價單



★

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?

SalesHomeLeads ▾Cases ▾Contacts ▾Calendar ▾Opportunities ▾Tasks ▾Files ▾Accounts ▾Quotes ▾More ▾

Quote

Oven Price

New ContactNew OpportunityNew Case ▾

Quote PDFs (1)

Name	Discount	Grand Total	Created By
Oven Price_V1.pdf	0.00%	\$100,000.00	Jay Chang ▾

View All

Notes & Attachments (1)

Upload Files

[Oven Price_V1](#)
Oct 3, 2022 • 74KB • pdf

View All


Refresh • Expand All • View All

▼ Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

手動建立商機




★

+

?

SalesHomeLeads ▾Cases ▾Contacts ▾Calendar ▾Opportunities ▾Tasks ▾Files ▾Accounts ▾More ▾

Lead
Ms. Amber An

[+ Follow](#)[New Case](#)[New Note](#)[Submit for Approval](#) ▾

Title	Company	Phone (2) ▾	Email
	Subway		

Open - Not Contacted

Working - Contacted

Closed - Not Converted

Converted

✓ Mark Status as Complete

ActivityDetailsChatterNews


New Task


Log a CallNew EventEmail

Add

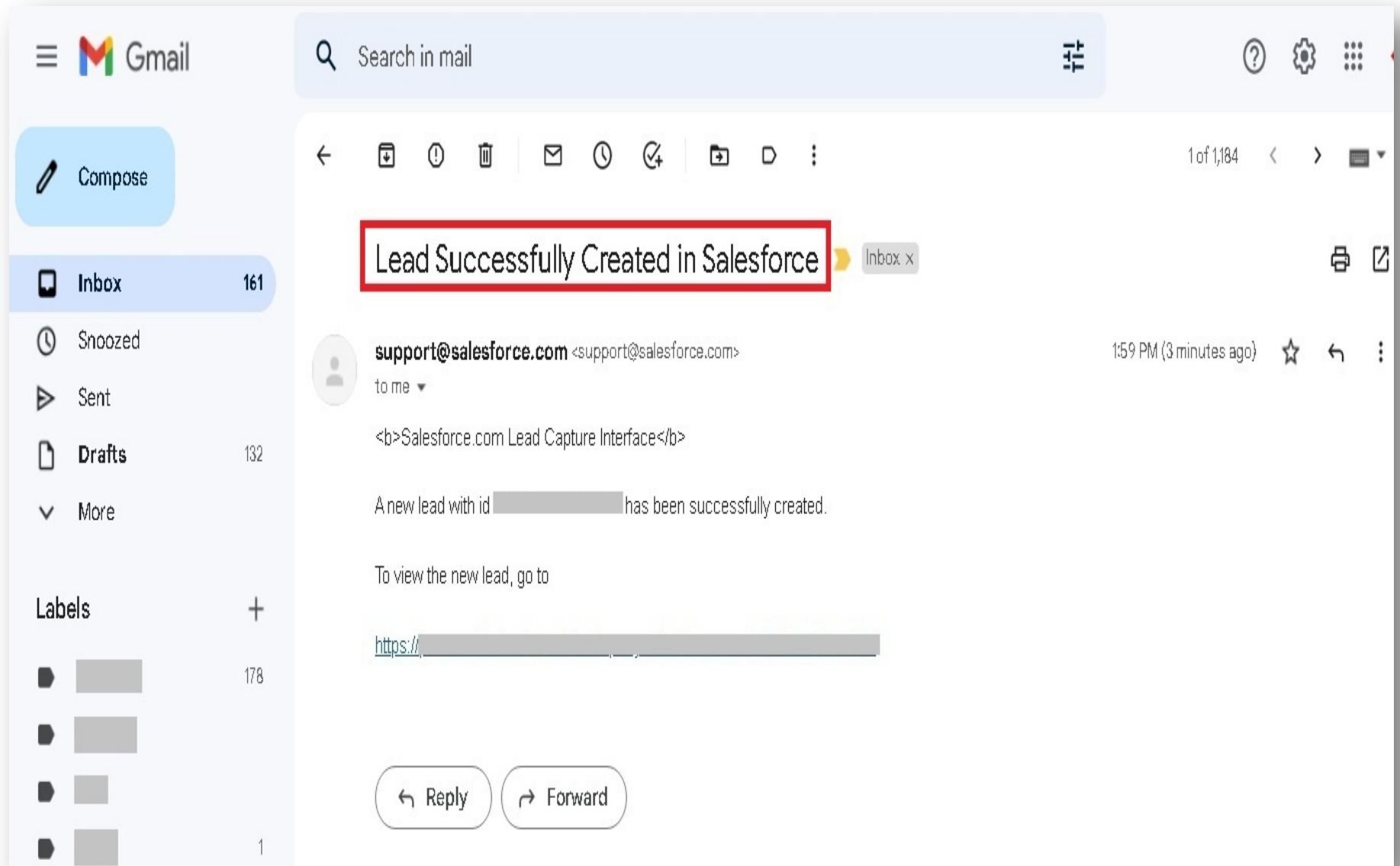
Filters: All time • All activities • All types

Related

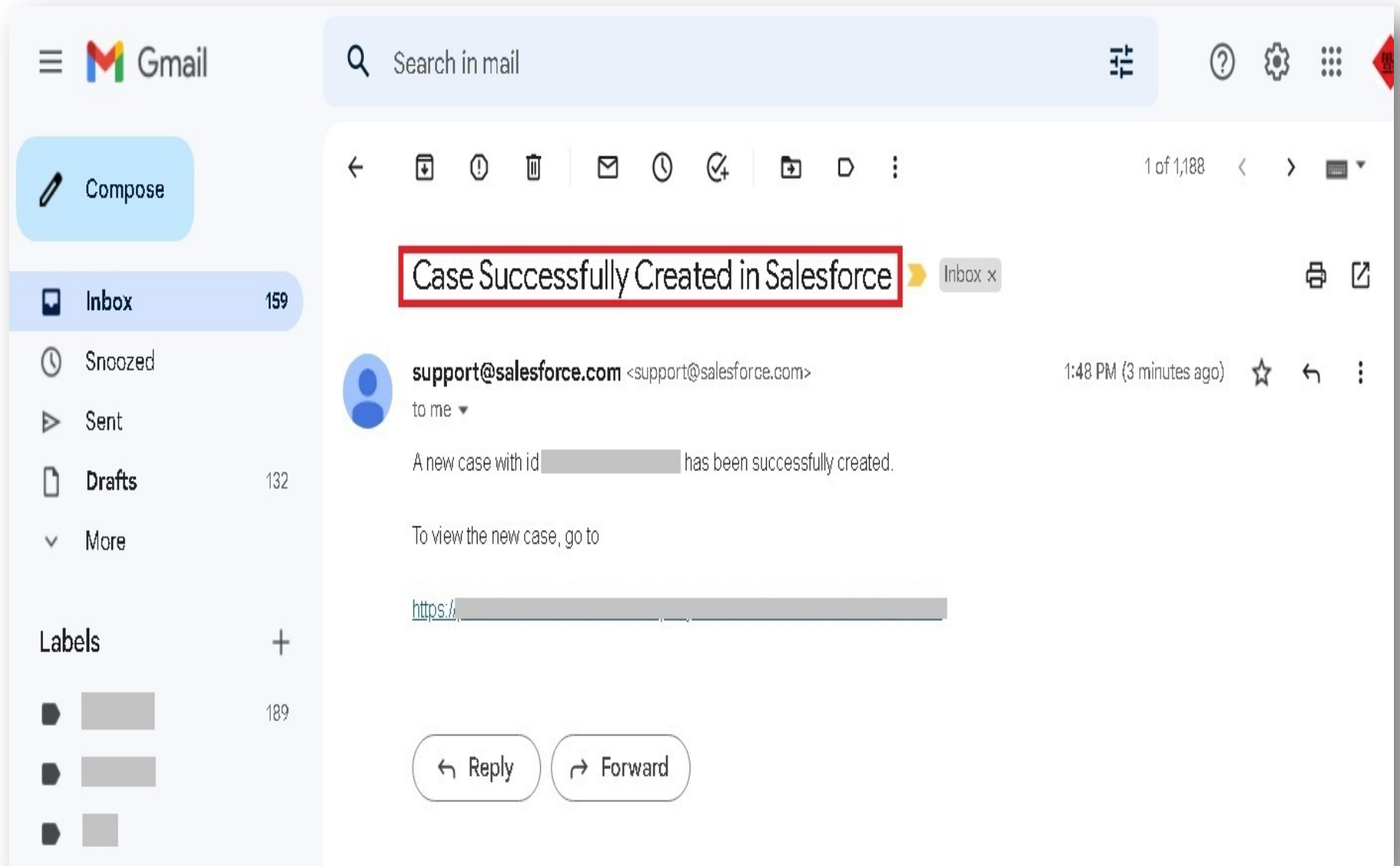
We found no potential duplicates of this Lead.

Campaign History (0) ▾

從網頁獲得商機



從網頁取得顧客回饋



客製標籤-標籤

The image shows a CRM application interface with a 'New Course' modal form open. The modal form is titled 'New Course' and contains a section labeled 'Information'. Inside this section, there is a text input field for 'Course Name' which is highlighted with a red border. To the right of the input field, the 'Owner' is listed as 'Jay Chang' with a profile picture. At the bottom of the modal, there are three buttons: 'Cancel', 'Save & New', and 'Save'. The background interface includes a top navigation bar with a search bar and various icons, and a sidebar with a 'Courses' tab selected.

Search...

Sales Home Leads Cases Contacts Calendar Opportunities Tasks Files Accounts Courses More

Courses Recently Viewed

0 items • Updated a minute ago

Course Name

New Import Change Owner

Information

* Course Name

Owner Jay Chang

Cancel Save & New Save

客製標籤-欄位

The image shows a Salesforce interface with a 'New Course' modal form open. The form is titled 'New Course' and has a close button (X) in the top right corner. The form is divided into sections, with the 'Information' section currently active. This section contains three fields: a required 'Course Name' text input, an 'Owner' dropdown menu showing 'Jay Chang', and an 'Instructor' dropdown menu. The 'Instructor' dropdown is highlighted with a red rectangular box and contains the placeholder text 'Search Contacts...' and a search icon. At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'. The background shows the Salesforce navigation bar with tabs for Sales, Home, Leads, Cases, Contacts, Calendar, Opportunities, Tasks, Files, Accounts, Courses, and More. The 'Courses' tab is selected, and a search bar is visible at the top.

New Course

Information

* Course Name

Owner Jay Chang

Instructor

客製標籤-記錄

The image shows a Salesforce interface. At the top, there is a navigation bar with a blue cloud logo on the left, a search bar in the center, and various icons (star, plus, shield, question mark, gear, bell, and user profile) on the right. Below the navigation bar, there is a sub-navigation bar with tabs for Sales, Home, Leads, Cases, Contacts, Calendar, Opportunities, Tasks, Files, Accounts, Courses, and More. The 'Courses' tab is currently selected. Below the sub-navigation bar, there is a header section for the 'Courses' list. It includes a 'Courses' icon and label, a 'Recently Viewed' dropdown, and a '1 item • Updated a few seconds ago' status. To the right of the header, there are buttons for 'New', 'Import', and 'Change Owner'. Below the header, there is a search bar labeled 'Search this list...' and a row of icons for settings, view, refresh, edit, and filter. The main content area displays a table with one row. The first column of the table is labeled '1' and the second column is labeled 'CRM'. A red rectangular box highlights the first row of the table.

Courses
Recently Viewed ▾

1 item • Updated a few seconds ago

New Import Change Owner

Search this list...

	Course Name
1	CRM

開啟可設定每周重複

The image shows a 'New Event' dialog box overlaid on a calendar application. The dialog box has a title bar 'New Event' and a section 'Calendar Details'. Inside 'Calendar Details', there is a 'Repeat' checkbox which is currently unchecked and highlighted with a red rectangular box. To the right of the 'Repeat' checkbox is a 'Location' text input field. Below the 'Calendar Details' section, there are several other fields: '* Assigned To' with a dropdown menu showing 'Jay Chang', '* Start' with '* Date' (Oct 2, 2022) and '* Time' (11:00 AM), and '* End' with '* Date' (Oct 2, 2022) and '* Time' (12:00 PM). At the bottom of the dialog box, there is a '* Subject' text input field and three buttons: 'Cancel', 'Save & New', and 'Save'. The background shows a calendar grid for October 2022.

New Event

Calendar Details

Repeat ☐

Location

* Assigned To

* Start

* Date Oct 2, 2022

* Time 11:00 AM

* End


* Date Oct 2, 2022

* Time 12:00 PM








* Subject

Cancel Save & New Save

新增課表



Search...



SalesHomeLeadsCasesContactsCalendarOpportunitiesTasksFilesAccountsMore

Calendar

October 2022

<>TodayRefreshCalendarNew EventMenu

SUN	MON	TUE	WED	THU	FRI	SAT
Sep 25	26	27	28	29	30	Oct 1
2	3 11am CRM	4	5	6	7	8
9	10 11am CRM	11	12	13	14	15
16	17 11am CRM	18	19	20	21	22
23	24 11am CRM	25	26	27	28	29

OCTOBER2022

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

My Calendars

My Events

SpecialCalendar

Other Calendars

手機版

上午 1:5888%

Events

[新增](#)

▼ 10月 2022

週日

週一

週二

週三

週四

週五

週六

25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

明天 10/3/22

11:00 上午 - 12:00 下午

CRM

Location



LeadsCasesContactsEvents功能表

23%上午 1:52

Event

[新增](#)

▼ 10月 2022

週日

週一

週二

週三

週四

週五

週六

25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

星期六 10/1/22

您沒有已排程的活動。

[新增 Event](#)



LeadsCasesContactsEvents功能表

自訂進度條-1

The screenshot shows a web application interface for managing courses. A modal form is open, allowing users to configure course details. The form includes fields for start and end times, repeat end date, and repeat weekday. A dropdown menu for 'Course Stage' is highlighted with a red box, showing options: '--None--' (selected), 'Midterm', and 'Final'. The background interface includes a search bar, navigation tabs (Sales, Home), and a list of courses.

Course Start Time

Date Time

Course End Time

Date Time

Course Repeat End Date


Repeat Weekday


Course Stage

- None--
- ✓ --None--
- Midterm
- Final

Save & New Save

自訂進度條-2



 Sales

Home

Leads ▾

Cases ▾

Contacts ▾

Calendar ▾


Opportunities ▾


Tasks ▾

Files ▾

Accounts ▾

Courses ▾

More ▾ 

 Course CRM

[New Contact](#) [Edit](#) [New Opportunity](#) ▾

Midterm

Final

Course Stage: Midterm [Mark as Current Course Stage](#)


Related

Details

Course Name

CRM

Owner

 [Jay Chang](#)

Instructor

[Amber An](#)

Course Start Time

10/14/2022, 1:00 PM

Course End Time

Activity


New Event

New Task

More

Set up an event...

Add

Filters: All time • All activities • All types 

[Refresh](#) • [Expand All](#) • [View All](#)

▼ Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

作業流程自動化-1

The screenshot displays the Flow Builder interface. The top navigation bar includes a back arrow, the 'Flow Builder' title, and a help icon. Below this, a toolbar contains a 'Select Elements' button, undo/redo icons, a settings gear, an 'Auto-Layout' dropdown, and buttons for 'Run', 'Debug', 'View Tests (Beta)', 'Activate', 'Save As', and 'Save'. The left sidebar is divided into a 'Toolbox' and a 'Manager' section. The 'Manager' section features a search bar labeled 'Search this flow...' and a 'New Resource' button. The main workspace shows a flow diagram enclosed in a red border. The flow begins with a 'Start' trigger, labeled 'Record-Triggered Flow', which is configured with the following details: Object: Course, Trigger: A record is created, and Optimize for: Actions and Related Records. Below the trigger configuration are two links: '+ Add Scheduled Paths (Optional)' and 'Open Flow Trigger Explorer for Course'. The flow continues to a 'Run Immediately' step, followed by a connector (a circle with a plus sign), and finally ends at an 'End' node, represented by a red square.

Flow Builder

Select Elements

Auto-Layout

Run Debug View Tests (Beta) Activate Save As Save

Toolbox

Manager

Search this flow...

New Resource

Start
Record-Triggered Flow

Object: Course Edit

Trigger: A record is created

Optimize for: Actions and Related Records

+ Add Scheduled Paths (Optional)

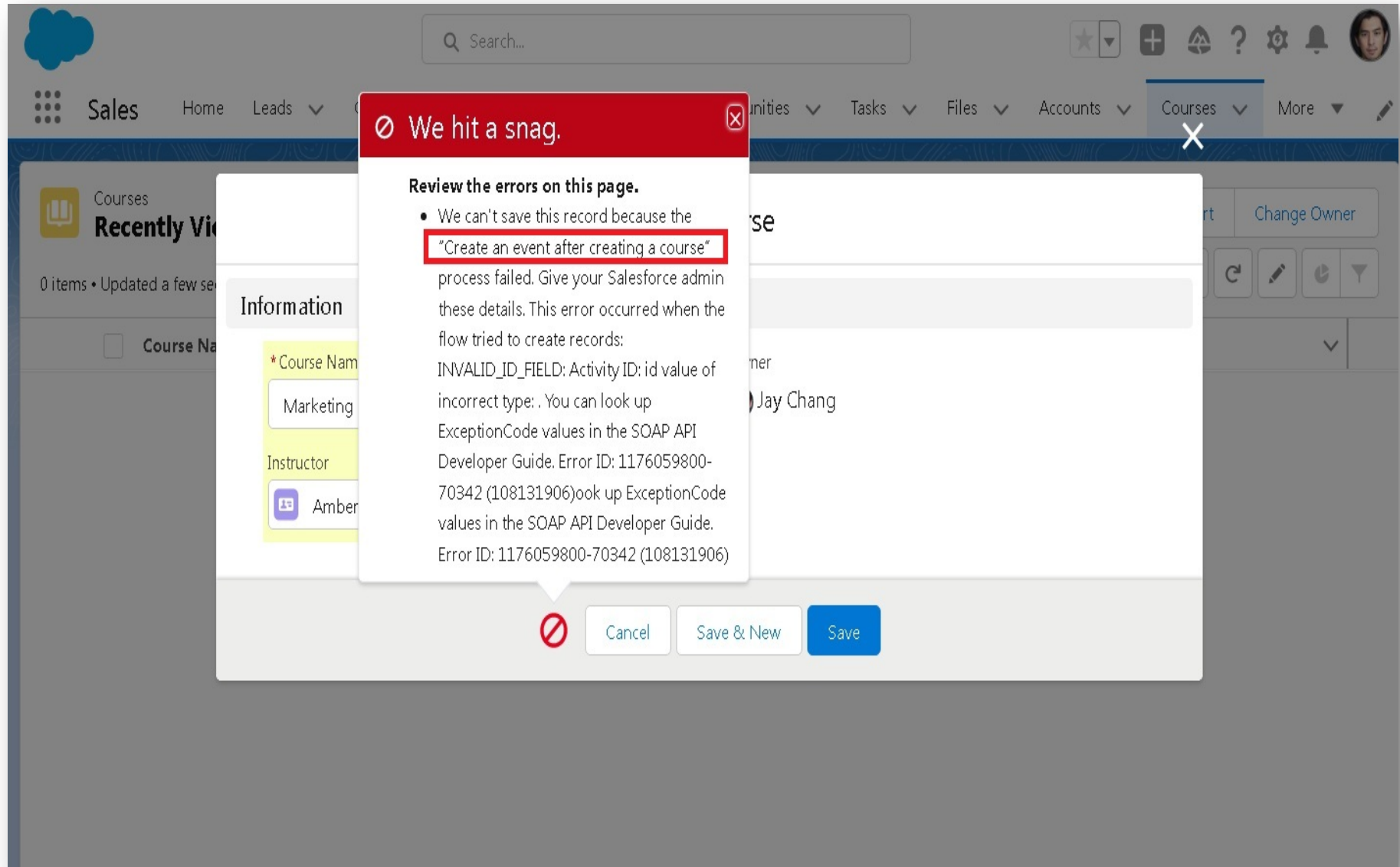
Open Flow Trigger Explorer for Course

Run Immediately

+

End

作業流程自動化-2



作業流程自動化-3

The screenshot shows a CRM interface with a modal form titled "Information". The form contains the following fields:

- * Course Name**: A text input field with a red border and the message "Complete this field." below it.
- Owner**: A dropdown menu showing "Jay Chang" with a profile picture.
- Instructor**: A search field labeled "Search Contacts..." with a magnifying glass icon.
- Course Start Time**: A section containing two input fields: "Date" (with a calendar icon) and "Time" (with a clock icon).
- Course End Time**: A section containing two input fields: "Date" (with a calendar icon) and "Time" (with a clock icon).
- Course Repeat End Date**: A single input field with a calendar icon.
- Repeat Weekday**: A single input field.

A red rectangular box highlights the "Course Start Time", "Course End Time", "Course Repeat End Date", and "Repeat Weekday" sections. At the bottom of the form are three buttons: "Cancel", "Save & New", and "Save".

作業流程自動化-4

The screenshot displays a CRM application's calendar interface. At the top, there's a navigation bar with a search bar and various icons. Below it, a menu bar includes tabs for Sales, Home, Leads, Cases, Contacts, Calendar (selected), Opportunities, Tasks, Files, Accounts, and More. The main area shows a calendar for October 2022. A red box highlights a recurring event '1pm Final C...' on Thursdays. The right sidebar shows a monthly view of October 2022 and sections for 'My Calendars' and 'Other Calendars'.

SUN	MON	TUE	WED	THU	FRI	SAT
Sep 25	26	27	28	29	30	Oct 1
2	3	4	5	6	7 1pm Final C...	8
9	10	11	12	13	14 1pm Final C...	15
16	17	18	19	20	21 1pm Final C...	22
23	24	25	26	27	28	29