

CRM顧客關係管理系統Salesforce



級別：初級
講師：福別問

為何Salesforce重要

104人力銀行 My104 履歷診療室 學習精靈 職場力 掌聲 學習歷程 更多 ▾ 半導體工作特輯_24H線上招募

🏠 帳號 ▾ 註冊 登入

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)

企 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

為何要有人教

Salesforce for Beginners


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




Packt
www.packt.com

自學很難，有人教就很簡單。書跟不上變化。補習班很貴。

為何要用英文介面

 developers

PRODUCTS DOCS LEARN COMMUNITY BLOG COVID-19

Search 

Login > Sign Up >

Home »

Discussion Forums

Login with Salesforce

Don't have an account?
Signup for a Developer Edition

Browse by Topic

Apex Code Development
(89021)

General Development
(54445)

Visualforce Development
(37021)

Lightning (17017)

APIs and Integration (16455)

Trailhead (11522)

Formulas & Validation Rules
Discussion (11004)

Other Salesforce Applications
(7921)

Jobs Board (6631)

Force.com Sites & Site.com
(4778)

Mobile (2644)

View More Topics
See All Posts

What would you like to know?

Show All Questions sorted by Date Posted ▾

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

論壇與解答都是英文

Join over 6.0 million Salesforce developers. **Subscribe Now!**

FEEDBACK

註冊帳號

Search Setup

Setup Home

Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

New Salesforce Mobile App QuickStart

Lightning Usage

Optimizer

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Apps

> Feature Settings

> Einstein

SETUP Home

Create

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

Most Recently Used

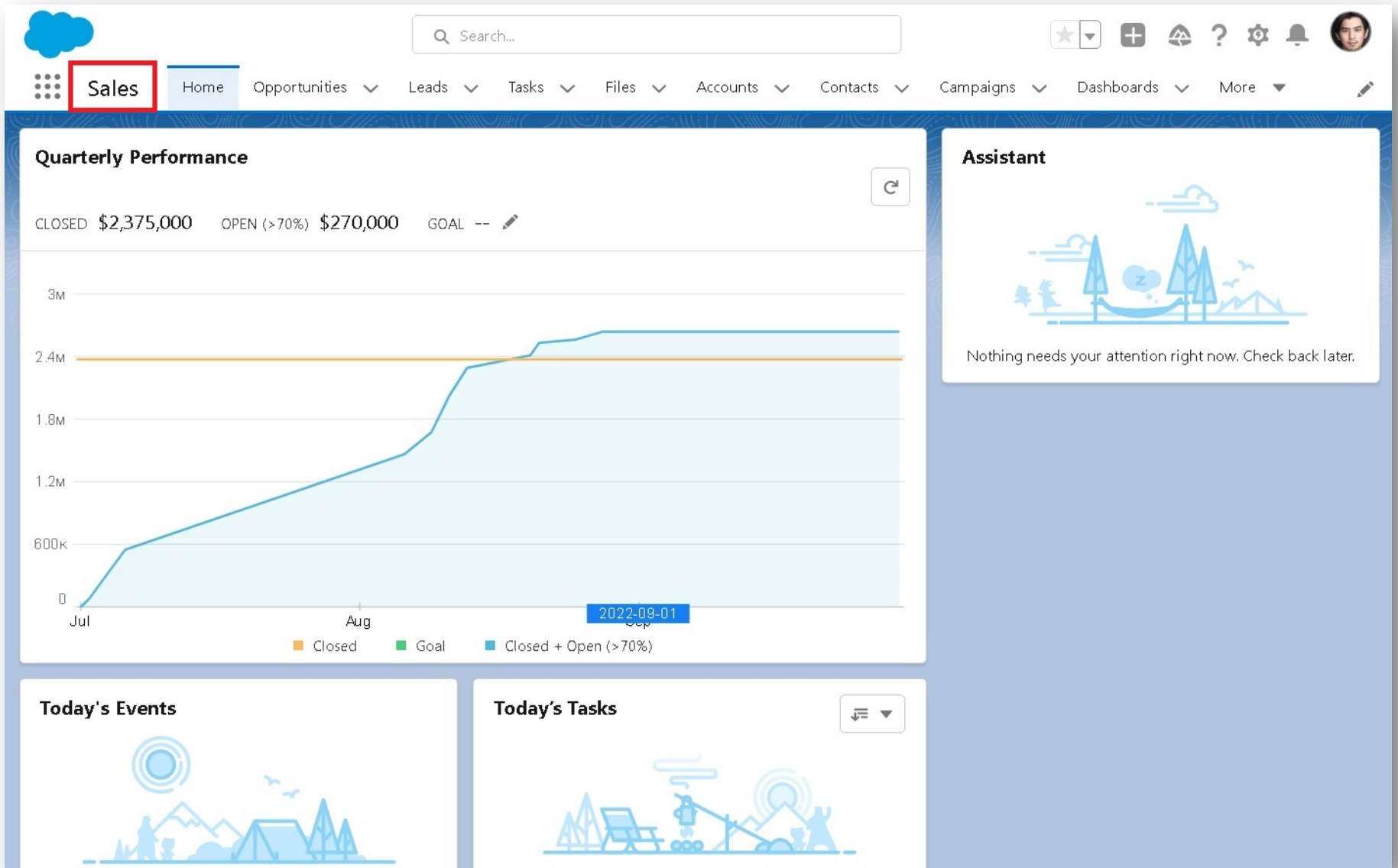
8 items

NAME	TYPE	OBJECT
Lee	User	
Testname	User	


Slack

註冊：<https://developer.salesforce.com/signup>，登入<https://login.salesforce.com>

切换到Sales模式



更換頭貼



★


+

🏠

?

⚙️

🔔



☰

Sales

Home

Opportunities ▾

Leads ▾

Tasks ▾

Files ▾

Accounts ▾



Contacts ▾



Campaigns ▾

People ▾

More ▾

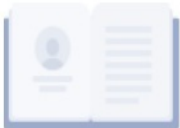
✎






Jay Chang


EditUser 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.

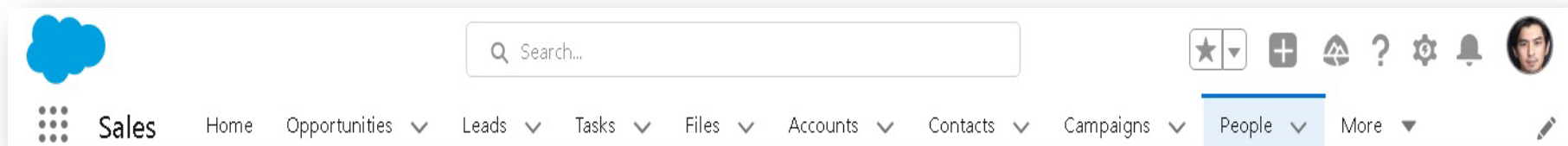


Connect with fellow Trailblazers on the Trailblazer Community.

Details

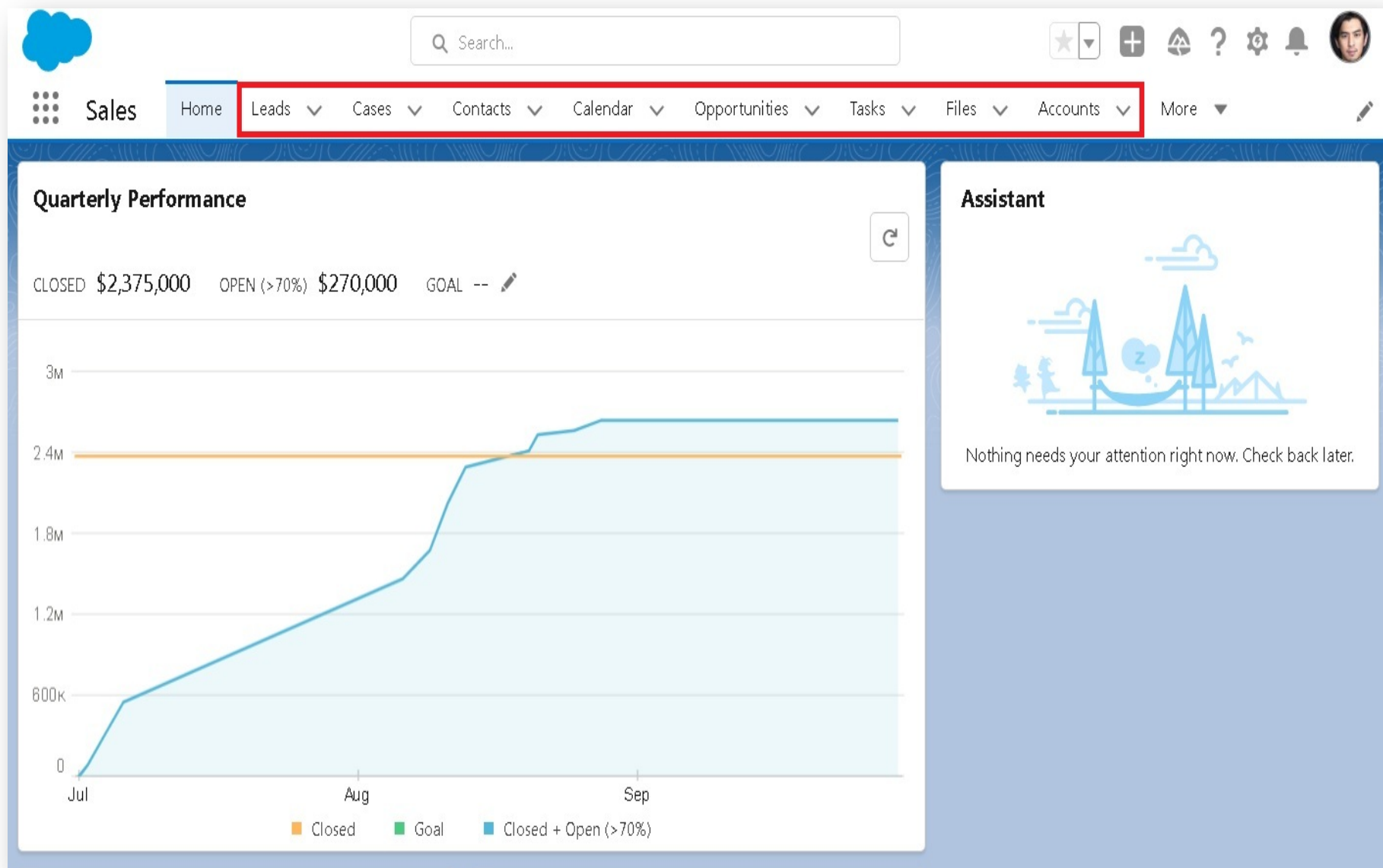
Related

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



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
Subway

Phone (2) ▼

Email

Open - Not Contacted

Working - Contacted

Closed - Not Converted

Converted

✓ Mark Status as Complete

Activity

Details

Chatter

News

New Task

Log a Call

New Event

Email

Add

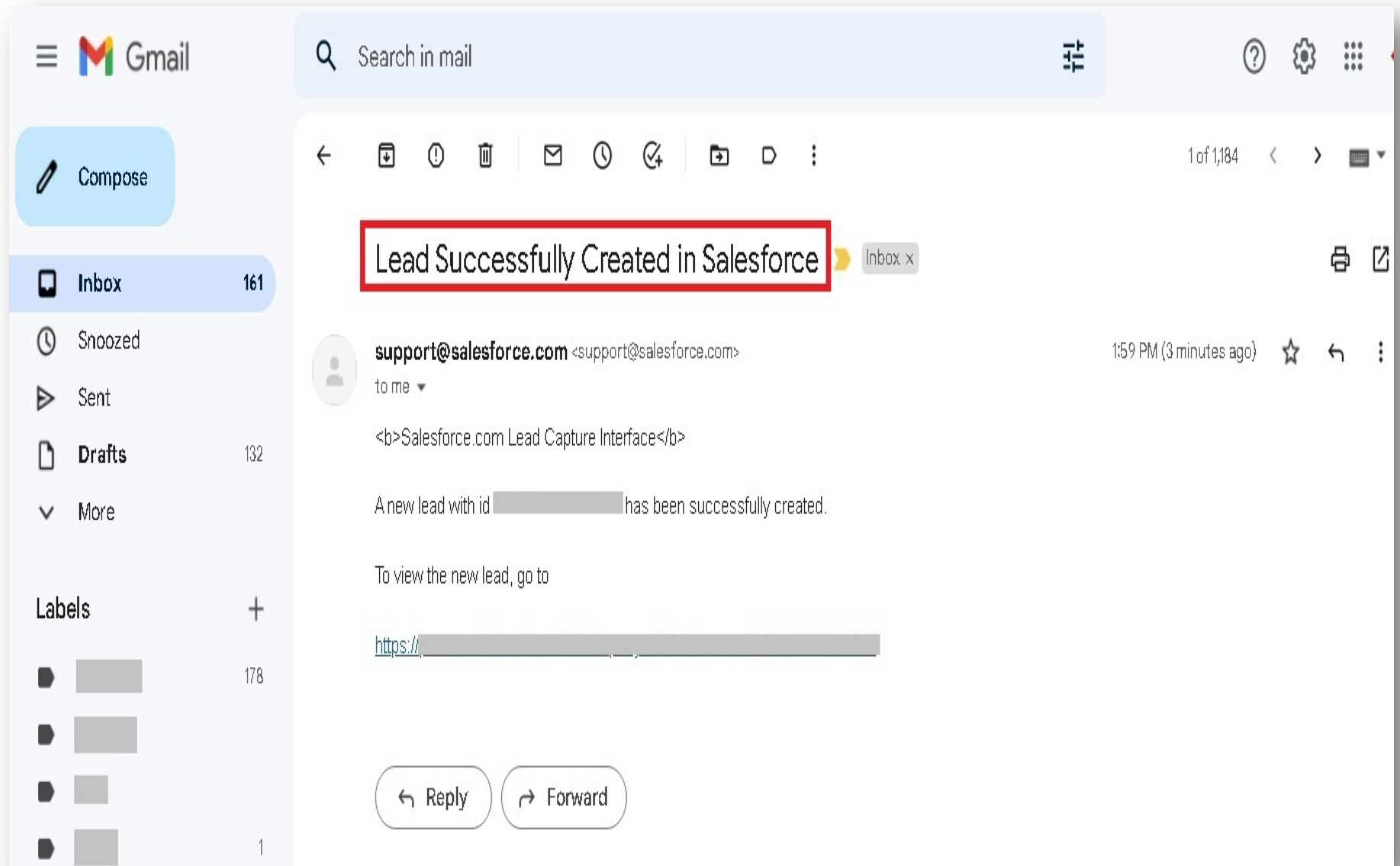
Filters: All time • All activities • All types

Related


We found no potential duplicates of this Lead.


Campaign History (0) ▼

從網路獲得商機



機會與報價單



 Sales

Home

Leads ▾

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




Search...



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

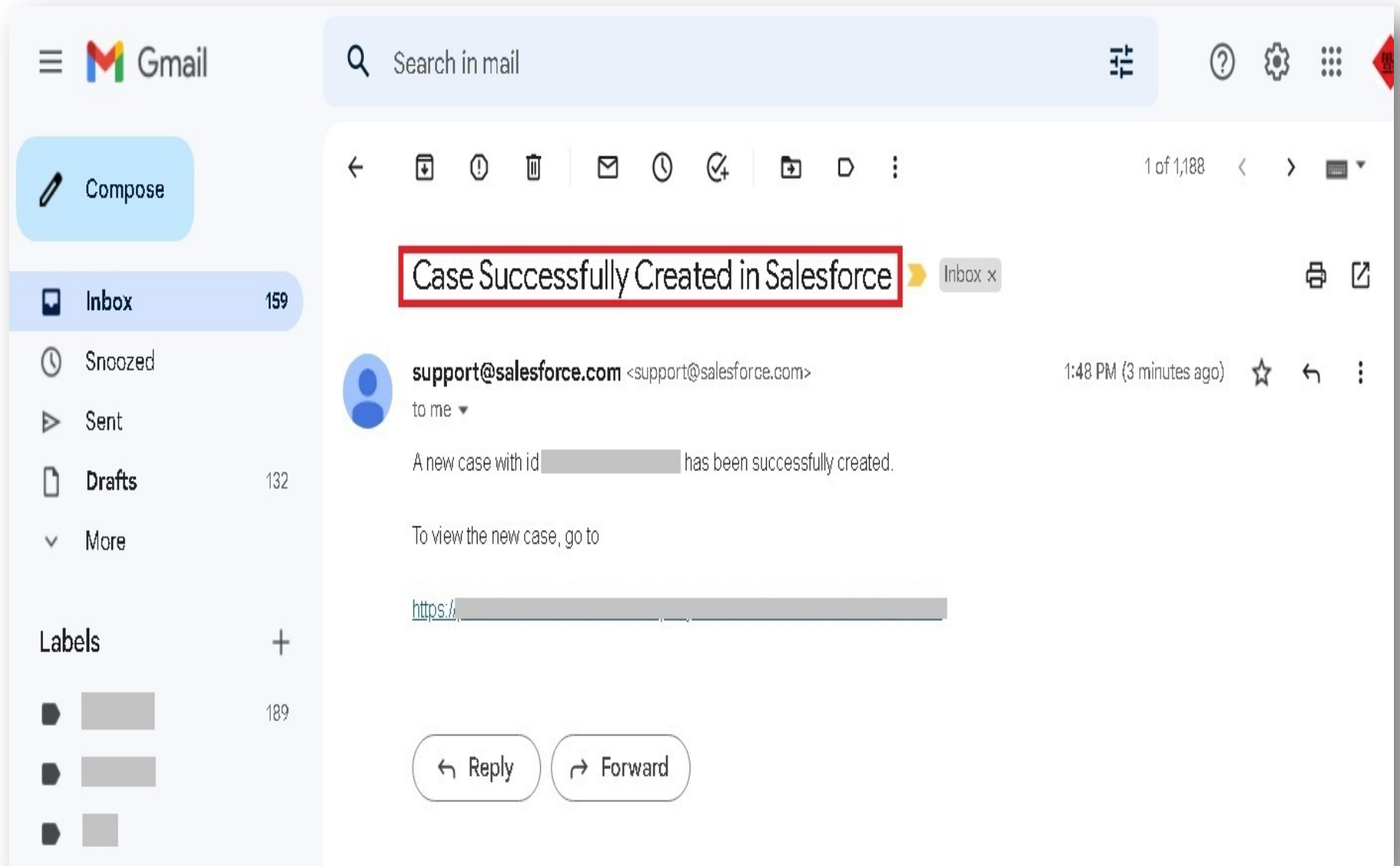
Refresh • Expand All • View All

▼ 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.

從網頁取得顧客回饋



客製標籤-標籤

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 Course

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' field (marked with an asterisk), an 'Owner' field showing 'Jay Chang' with a profile picture, and an 'Instructor' field. The 'Instructor' field is highlighted with a red rectangular box and contains a search bar with the placeholder text 'Search Contacts...' and a magnifying glass 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, and Courses (which is selected). A search bar is also visible at the top of the page.

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 Course

Information

* Course Name

Owner

Jay Chang

Instructor

Search Contacts...

Cancel Save & New Save

客製標籤-記錄

The image shows a Salesforce interface. At the top, there is a navigation bar with the Salesforce logo, a search bar, and various icons. Below this 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 selected. The main content area shows a list of courses under the heading 'Courses Recently Viewed'. There is a search bar for the list and several action buttons. A red box highlights the first item in the list, which is 'CRM'.

Courses
Recently Viewed

1 item • Updated a few seconds ago

Search this list...

☐ Course Name

1	<input type="checkbox"/> 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 is 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 and time pickers (Oct 2, 2022, 11:00 AM), and '* End' with date and time pickers (Oct 2, 2022, 12:00 PM). At the bottom of the dialog box, there are 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

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 1:58

88%



新增

Events

▼ 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



上午 1:52

23%



新增

Event

▼ 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 course management. A modal form is open, allowing users to set course details. The form includes fields for 'Course Start Time' (Date and Time), 'Course End Time' (Date and Time), 'Course Repeat End Date', and 'Repeat Weekday'. A dropdown menu for 'Course Stage' is open, showing three 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

Instructor


[Amber An](#)

Course Start Time

10/14/2022, 1:00 PM

Course End Time

Owner

 [Jay Chang](#)


Activity

New Event

New Task

More

[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 'Select Elements', undo/redo buttons, a settings gear, an 'Auto-Layout' dropdown, and buttons for 'Run', 'Debug', 'View Tests (Beta)', 'Activate', 'Save As', and 'Save'. The left sidebar features a 'Toolbox' section and a 'Manager' section with a search bar and a 'New Resource' button. The main workspace shows a flow diagram with a 'Start' trigger (a green play button icon) labeled 'Record-Triggered Flow'. The configuration for this trigger is shown in a panel: 'Object: Course' (with an 'Edit' link), 'Trigger: A record is created', and 'Optimize for: Actions and Related Records'. Below the configuration are two links: '+ Add Scheduled Paths (Optional)' and 'Open Flow Trigger Explorer for Course'. The flow continues with a 'Run Immediately' step, followed by a connector (+), and finally an 'End' step (a red square icon). A red rectangle highlights the entire flow diagram area.

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)

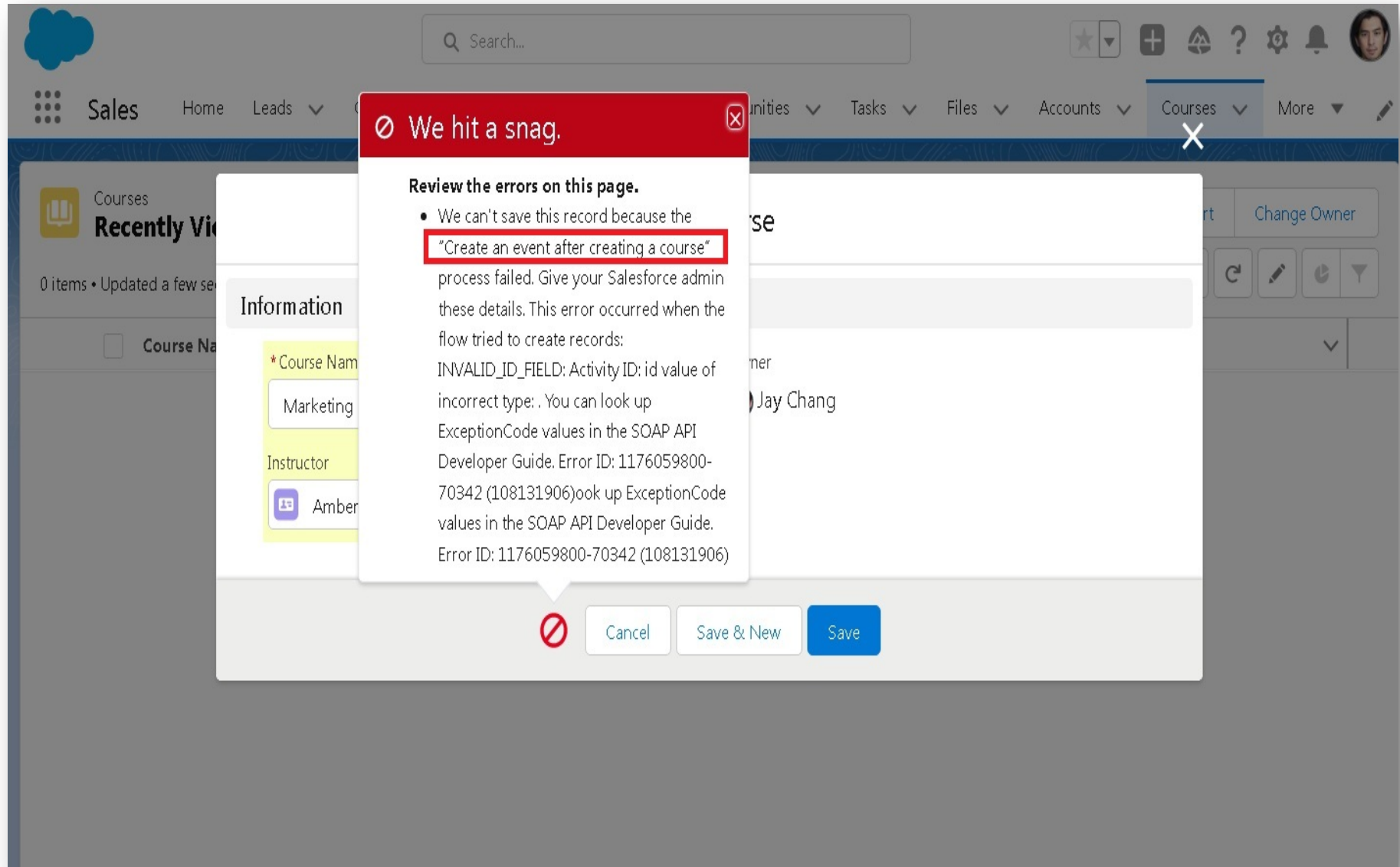
Open Flow Trigger Explorer for Course

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 a red error 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 modal, there 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. The top navigation bar includes a 'Sales' module and links to Home, Leads, Cases, Contacts, Calendar (selected), Opportunities, Tasks, Files, Accounts, and More. A search bar is located in the top right. The calendar view shows a weekly grid for October 2022. A red box highlights a recurring event '1pm Final C...' on Thursdays. The right sidebar contains a monthly calendar view for October 2022 and a 'My Calendars' section with 'My Events' and 'SpecialCalendar'.

Calendar View: October 2022

SUN	MON	TUE	WED	THU	FRI	SAT
Sep 25	26	27	28	29	30	Oct 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

Highlighted Event: 1pm Final C... (Recurring on Thursdays)

Right Sidebar:

- My Calendars**
 - My Events
 - SpecialCalendar
- Other Calendars**