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SALESFORCE.COM CRM ADMINISTRATION MATERIAL

CRM (Customer Relationship and Management) Fundamentals

CRM Definition and Usage

Types of CRM's(On-Demand and On-Premises)

CRM Concepts (Lead, Opportunity, Account, etc.)

Case Management and Knowledge

Portals (Consumer and Company) and Chatter

Salesforce.com CRM's

Sales Cloud

Service Cloud

Data.com

Chatter

Force.com

Social Enterprise

Introduction to Cloud Computing

What is Cloud Computing?

Evolution of Could Computing

Different types of Clouds

Classification of Cloud Services (IaaS, PaaS, SaaS)

Advantages of Cloud Computing

It reduces the cost

Increased storage

Simple User Interface Flexibility

Low Maintainance and Low risk

Introduction to Salesforce Products

Sales Cloud

Enhances the effectiveness of the sales team & have increase the amount of sales.

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Provides account information of the customer

The information gathered from the social platforms about the product and customer.

Helps in correctly judging the potential of a sales lead and closing the sales faster.

Key Business Goals:

- Closing more deals
- Close deals faster
- Get more deals
- Quicker decisions

Key Features:

Contact Management	Workflows and Approvals
Opportunity Management	Territory Management
Salesforce Engage	Files Sync & Share
Lead Management	Partner Management
Account Management	
Reports & Dashboards	
Sales Forecasting	

Service Cloud

Focused on providing support & help to the customers.

- Helps in retaining the customers.
- Increase their satisfaction and loyalty.
- Faster service compared to traditional model.
- Giving individual attention to each customer needs.

Key Business Goals:

- Personalised service
- Always-on service
- Multi-channel support
- Faster Support

Key Features:

- Case Management
- Solutions Management
- Console for Service
- Knowledge base
- Social Customer Service

- Live Agent

- Mobile Platform

- Service Cloud Communities

Marketing Cloud

This provides you with one of the world's most powerful digital marketing platforms.

The marketers in your organisation can use it to manage customer journey, email, mobile, social media, web personalisation, content creation, content management and data analysis.

Key Features:

- ◦ Campaign Management

- ◦ Lead Management

- ◦ Search Marketing

- ◦ Contact Management

Community Cloud

Social platform for your organisation to connect and facilitate communication among your employees, partners and customers.

To exchange data and images in real time.

Force.com

Technologies behind Force.com platform app:

- o Multitenant Architecture:

- o Metadata driven development model:

- o API Access

- o APEX

- o Visualforce

- o Mobile Access

- o AppExchange Directory

Multitenant Architecture:

An Application model in which all users and apps share a single, common infrastructure and code base.

Metadata driven development model:

An App development model that allows apps to be defined as declarative "blueprints", with no code required.

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Allows app developers to quickly build a lot of functionality with tools provided by the platform.

API Access

Provide direct access to all data shared in Force.com from virtually any programming language and platform.

To modify the actual data in an app and use third-party services to create more customised app behaviours.

Used to integrate third party applications with the force.com platform.

SOAP API & REST API   : Integrates your org's data with other applications

RESTful BULK API   : Loads or deletes large numbers of records

Metadata API   : Manages customisations in your org.

Chatter REST API   : Accesses Chatter feeds and social data

Streaming API   : Provides notifications reflecting data changes in your organisation.

They allow programmers to access and manipulate apps from any server location, using any programming language that supports Web services, like Java, PHP, C#, .NET

AppExchange Directory:-

A web-directory where hundreds of force.comm apps are available to Salesforce customers to review, install.

Database.com

It organizes, projects and manages shared database access reliably, securely, efficiently.

Characteristics of Database.com:-

- ◦ Easy to Use: Nothing to manage, Salesforce.com takes care of everything
- ◦ Trustworthy: Built keeping security & privacy of customers in mind
- ◦ Modern: Force.com is more than just another database system.
- ◦ Open
- ◦ Powerful

Database table presents information in Rows and Columns

Row(Record)

Column(Field)

Relational Database:- A relationship is an association b/w two or more tables.

Uses: Unnecessary repetition of data, Capturing of additional information.

Primary Key: A field whose value uniquely identifies the record.

Foreign Key: A field whose value is the same as the primary key of another table.

The relationship is made between two tables by matching the values of foreign key in one table with the value of primary key in another.

Designing Applications on the Force.com Platform

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The Declarative Framework

A browser based powerful point & click tool.

It makes configuring, customising & building applications quick & easy.

Architecture layers:

1. Trusted Multitenant Cloud

2. Scalable Metadata Platform

3. Enterprise Ecosystem

Application Design Considerations

MVC-architecture

Model

View

Controller/Business Logic: is a set of rules and calculations that handle information exchange between User Interface and Database.

Declarative Options: Queues, Workflows, Validations, Assignment Rules, Rollup Summary, Cross Object Fields

Programmatic Options: Apex, Visualforce Controllers, Web Services API

Custom Applications and Tabs

Custom Apps

Quick Start: - Automatically creates:

1. A tab to access your object's associated data.

2. Permission set, to control visibility for users of the app.

3. Default reporting components.

App Label: Display name

App Name: Internal name referred in code

Console App

Designed for users in fast-paced environments who need to find, update and create records in Salesforce quickly.

Displays all the records as tabs on one screen.

Primary tab displays the main record to work, Subtabs display related records.

Custom Tabs

Tab serves as the starting point for viewing, editing and entering information for a particular object

Tabs used to organise objects and records

Each tab is associated with unique object.

Building Application Data Model

Objects

Objects are what allow you to store data in your Salesforce organization.

Forecasts

Products

Reports

Ideas

Dashboards

Answers

Custom objects have properties:

Custom Fields

Relationship to other objects

Page Layouts

A custom User Interface(Optional)

Allow Reports-→Allows to create Reports for this object.

Allow Activities→We can create activities like New for this object.

Track Field History→We can track every change made to a field in records in Object. We can track upto 20 field for an object.

Deleted record can be recovered for upto 45 days.

S-Controls:

-Used to upload contents such as Java applets or active X controls

Fields

Classifications

Record: A record is a single instance of a Salesforce object, has a form for viewing and editing data in fields.

Cross Object Fields: Can navigate upto 5 levels (Child object to Parent Object)

Can't reference formula in Rollup summary field

Record owner merge field for any object

Formula Fields do not store values on the record

Rollup Summary fields stores the value

To view encrypted fields, "View Encrypted Data" permission to be enabled.

Encrypted fields can't be unique, external ID, or have default values.

Objects can have upto 500 custom fields

Standard picklist can be controlling picklist but not dependent picklist.

Maximum values allowed in controlling field is 300

Merge fields display values based upon formula calculations.

Child records in Master-Details relationship do not have owners. They inherit ownership from the Parent record.

Standard object cannot be child in Master-Detail relationship.

Rollup Summary fields only enable for Master-Details relationship. Used to perform Sum, Max, Min and Count on its child records.

Max. of Lookup relationships in an Object - 25

Max. of Master-Detail relationships in an object – 2

Standard Fields: ID, Name, Owner, Created/Last Modified…

Record Id: 15 digits or 18 digits, created by database

First 3 characters of the "id" identify the object.

It's not a random number

Formats for Record Id:

15-digit case-sensitive form

18-digit case-insensitive form

API always return 18-digit ID, but accepts any form.

Converting 15 digits to 18 digits:

Split 15 digits into 3 parts of each 5 digits

Calculate binary values for each part

Add that combination to the end of each 15 digit

3 ways to find out the "Id"

   -From the URL when a record is displayed

   -From Repors

   -Through the Web services API.

Data loader uses Web Services API to display the IDs'

IDs' returned by Reports = 15-Digits

IDs' returned by Web Services API = 18 digits

Two types of Data Loader logs:

   sdl.log

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sdl_out.log

Data Management   - Ongoing process

Data Migration   - One time task

External IDs:

Available for field type Text, Number or Email

Creates custom index in database

Max. 3 fields can be set as external Ids.

Use: Used for migration and integration of data.

Custom Fields

Field is a part of an object that holds a specific piece of information, or can link related objects together.

Custom Field Wizard: Available as one of the related lists on the "Object details setup page".

Force.com Quick Access Menu:

- ◦   Available from any object list view page and record detail page
- ◦   Only for users with the "Customise Application" permission.

Field Description: Describes about the purpose of using that field.

Help Text: Field level help with information about how to use that field.

Created field gets added as the last field in the first 2-column section of the Page layout.

Schema Builder:

Great tool to architecting and displaying the data model like Objects, Fields and Relationships in your schema.

Uses:

1. User able to see how the different objects related to one another

2. Building out several objects at once

3. Deal with visibility and security

Quick Access Menu:

This is a tool bar, hidden off screen on the right hand side, and is a representation of the object detail set up page.

Uses:

1.User can navigate to areas of the setup related to what he can customise, or quickly add elements from inside app.

2.This productivity feature is ideal for quick additions and modifications to your org.

Data Types

To create custom fields, you need to select Datatype.

Datatype limits what kind of data to store in that field.

Auto-Number: A system generated sequence number that uses a display format we define. The number is automatically incremented for each new record.

Currency: Allows users to enter a dollar or other currency value and automatically formulates the field as a currency amount.

Email: Allows users to enter an email address, which is validated to ensure proper format.

Picklist: The maximum length of the text values is 40 characters. Maximum of 300 picklist values.

Picklist(Multi-Select): After saving a record, the data is stored as text along with semi-colons which are used to separate the individual picklist values.

Text(Encrypted): For encrypted text, we can set a maximum length of upto 175 characters.

URL: Allows users to enter any valid website address. Can store 255 characters, but only first 50 characters are displayed on the record details page.

Field Dependencies

The value chosen in the controlling field affects the values available in the dependent field.

Standard picklist fields can only be controlling

We can set default value for controlling field but not for dependent picklists.

If a dependent picklist is required and no value is available for it based on Controlling field value, user can save the record without entering a value.

The maximum # of values in a controlling picklist : 300

Custom Formula Fields

Custom formula field calculates the value of the field based on the value in other fields of the same record.

Formula fields also let you set dynamic default values for new records.

The values starts with '$' (Global Symbol)

  Ex:- $API, $User, $Profile,…

Formulas can reference standard, custom or other formula fields as required

Formula fields cannot reference themselves

Fields used in the formulas cannot be deleted without Administrator removing the formula first.

Number of characters we can enter is 3900

The formula compile capacity is 4000 characters

A formula is an algorithm, that derives a value from other fields, expressions or values.

Formulas can be used in many contexts:

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Custom Formula Field	Workflow Rules	Custom Buttons & Links
Default field values	Approval Processes	Visualforce Pages
Data validations	Approval Steps	
Reports	Escalation Rules	
Workflow Field Updates	Assignment Rules	

Used to determine when certain actions should occur on the platform.

Similar to an equation that is executed at run time.

Date&Time Functions:

Date(YYYY,MM,DD): Used to display in that format

Date Value: Displays date value

Date/Time:

Day: Extracts Day values from Date field

Month: Extracts Month value from Date field

Year: Extracts Year from Date field

Today: Display present date

Now: Display data with time

Text Functions:

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Begins(Text, Compare-Text): Checks if text begins with specified character(TRUE/FALSE)

Contains(Text,Compare-Text): TRUE/FALSE

FIND: Returns text found

Includes(Multi-Select Picklist, Text-Literal): TRUE/False; If selected value is equal to Text-Literal.

IsPickVal(Picklist-Field,text-literal): True/False; Checks whether the value of a picklist field is equal to a string literal.

LEFT(Text,number-chars): Returns the specified number of characters from the start of a string from left side.

RIGHT(Text,Number-Characters): Returns the specified number of characters from the start of a string from right side.

MID(Text,Start-Number,Num-Chars): Returns the characters from the middle of a text string mentioned no.of characters from the starting position.

LEN(Text): Returns the no.of characters in a text string.

Lower(Text): Converts all the letters in the value of lower case

Upper(Text): Converts all letters in the value to upper case

LPAD(Text,Padding-Length,Pad-String): Pad the left side of the value with spaces or the optional pad string

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RPAD(Text,Padding-Length,Pad-String): Pad the right side of the value with spaces or the optional Pad string.

Substitute(Text,Old-Text,New-Text): Substitutes new text for old text in a string

Text(Value): Converts a value to text using standard display format.

TRIM(Text): Removes all spaces from a text string expecr for single spaces between words.

Math Functions:

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ABS(Number): Returns the absolute value of a number, a number without sign.

CEILING(Number): Rounds a number to the nearest integer.

EXP(Number): Returns 'E' raised to the power of a given number.

FLOOR(Number): Rounds a number down, towards zero to the nearest integer

IsBlank(Expression): TRUE/FALSE

LN(Number): Returns the natural logarithm of a number

LOG(Number): Returns the base 10 Log of N.

Max(Num1,Num2,Num3,..): Returns the greatest of all numbers

MIN(Num1,Num2,…): Returns the least of all numbers

Round(Number, Num-Digits): Rounds a number to a specified number of digits.

SORT(Number): Returns the positive square root of a number

Logical Functions:

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AND(Logic1,Logic2,..) True/False

OR(Logic1,Logic2,…): True/False

CASE(Expression, value1,result1, value2,result2,….): Checks an expression against a series of value.

IF(Logical-test,Value-if-TRUE,Value-if-FALSE)

ISNULL(Expression): True/False

IsNumber(Text): True/False

NOT(Logical): True/False

NullValue(Expression, Subtitute-Expression): Returns Substitute expression if Expression is Null, otherwise original expression.