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# Salesforce Tutorial for Beginners

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## Salesforce Tutorial for Beginners

Salesforce helps businesses keep track of customer interactions and sales data. It can handle leads, contacts, opportunities, and cases. Get proficient with the fundamentals through this Salesforce tutorial.

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## Introduction to Salesforce

Salesforce provides many tools, such as email marketing, lead collection, and lead scoring, to assist companies in automating their sales and marketing procedures. We cover the following in this Salesforce tutorial:

- Overview of Salesforce
- Architecture of Salesforce
- Salesforce Environment Setup
- Sales Cloud
- Service Cloud
- Salesforce Navigating Support
- Salesforce Control Access
- Objects in Salesforce
- Automating Business Process with Salesforce
- Advantages of Salesforce

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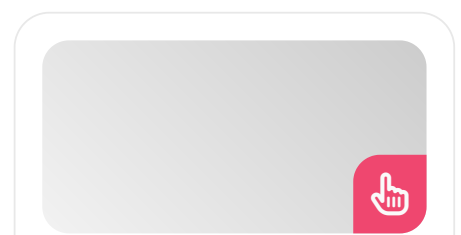


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## Overview of Salesforce

Salesforce was first developed as a cloud-based CRM system. CRM refers to the management of customer relationships. It entails overseeing every facet of a company's interaction with its clients.

For example, the client's contact information, ongoing or finished transactions, customer assistance inquiries, or a fresh lead from a new client.

## Features of Salesforce

Here are the features of Salesforce:

- **Contact Management:** It handles all the information related to a customer's interaction with it.
- **Opportunity Management:** It is the process of keeping track of all the information needed to find, move, and close a deal.
- **Salesforce Engage:** It offers real-time sales alerts under a customer's degree of participation.
- **Sales Collaboration:** It facilitates a team effort to involve everyone in the transaction and see it through to completion.
- **Sales Performance Management:** It offers the sales team ongoing feedback, incentives, and recognition in addition to goal-setting based on metrics.
- **Lead Management:** It supports ongoing campaign optimization across all channels.
- **Partner Management:** Establishing direct communication with channel partners to exchange aims, objectives, and actions is also beneficial.
- **Salesforce Mobile App:** This is the mobile platform that can be used to perform all of the aforementioned tasks.
- **Workflow and Approvals:** It assists in establishing an adaptable approval procedure with offer discounts, spending control, and

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other features.

- **Email Integration:** This helps give the current team freedom without adding to their learning curve.
- **Files Sync and Share:** The sales team can now effortlessly exchange different files, have discussions about them, and make necessary updates thanks to this capability.
- **Reports and Dashboards:** Dashboards provide a quick overview of the business in real-time. Anyone can use this to create comprehensive reports that are accessible from any location.
- **Sales Forecasting:** It offers an in-line editing mode and support for multiple currencies to effectively manage the sales forecast.
- **Territory Management:** With the help of this function, many territory models may be created and previewed before launch, and continuously optimized and balanced territories can be maintained all year long.

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### Architecture of Salesforce

Salesforce's architecture can be broken down into levels for easier comprehension. Each layer's goal and function are explained below:

#### Trusted Multitenant Cloud

In this case, numerous instances of one or more programs run separately in a common space.

- Tenants are the instances that, albeit physically staying in the same hardware, logically separate from one another.
- Its strong security and robust character are the reasons it is dubbed trustworthy.

## **Scalable Metadata Platform**

The platform that is powered by metadata facilitates customization and easy scaling up in response to an increase in data volume or concurrent user instances.

## **Enterprise Ecosystem**

The Enterprise Ecosystem of Sales is quite large because of the many partners that contribute by creating and maintaining apps on this platform.

## **CRM and Related Functionality**

Salesforce's feature list covers every facet of CRM and goes further with tools for building apps, incorporating analytics, and more.

## **APIs**

Salesforce offers a robust collection of APIs. This aids in the creation and personalization of the Salesforce Mobile App.

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## **Salesforce Environment Setup**

Salesforce does not require you to install any software because it is a cloud-based solution. To get started, all you need to do is register for a free trial.

Almost all of the capabilities you need to learn to comprehend the fundamentals of the Salesforce platform are available with the free trial account.

### **Step 1: Navigate to the Salesforce link and select "Free Trial."**

It opens a page where you have to sign up and provide some personal information.

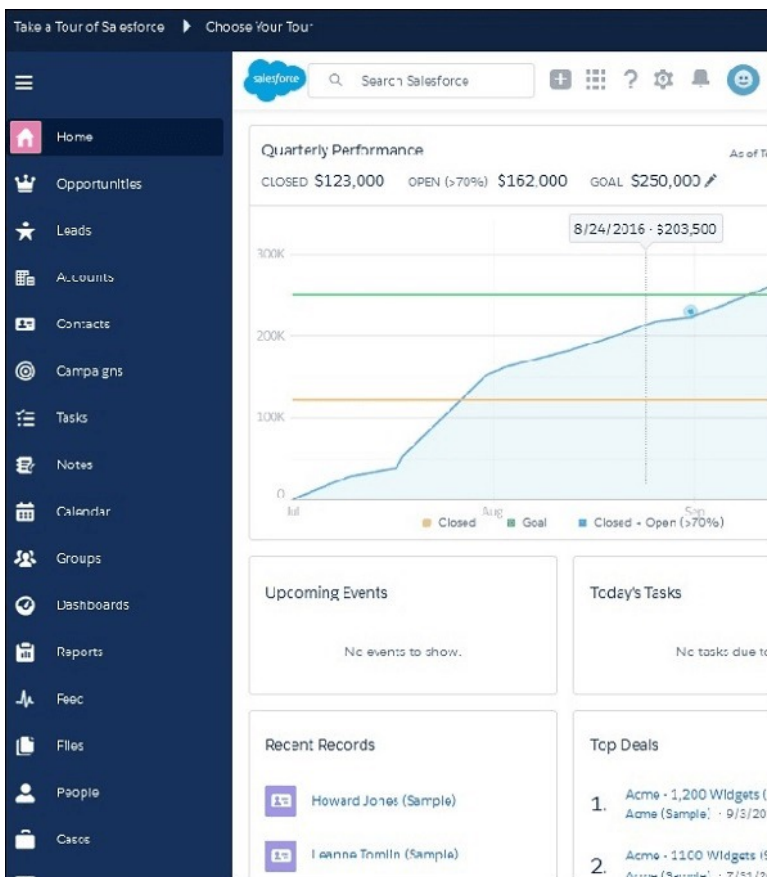
### **Step 2: An account activation email will be sent to you, along with account**

## information and the trial period's duration.

To validate your email address and activate your account, click the link in the email.

### Step 3: Go back to the Salesforce link and select Login.

Provide the login credentials that you have just made. You'll be taken to the subsequent screen.



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## Sales Cloud

The Salesforce.com platform's Sales Cloud feature aims to improve an organization's sales force's

efficiency, which in turn boosts sales volume.

In contrast to conventional sales approaches, it offers the customer's account information along with data collected from social media sites about the product and the customer, making it stand out. This makes it easier to assess a sales lead's potential and close deals more quickly.

## Key Business Goals of Sales Cloud

- **Close more deals:** It is simpler to close more leads when all account information and product details are readily available to meet the demands of the consumer.
- **Close deals faster:** Deals close more quickly thanks to mobile apps and visually appealing procedures for business process approvals.
- **Acquire additional discounts:** Campaigns are continuously optimized based on consumer feedback and channel partner closing interactions to close more business.
- **Faster decision-making:** The availability of dashboards and reporting improves sales forecasting accuracy and provides a very thorough picture of the business environment. As a result, business choices are made rapidly.

## Key Features of Sales Cloud

- Contact Management
- Opportunity Management
- Salesforce Engage
- Lead Management
- Reports and Dashboards
- Sales Forecasting
- Workflow and Approvals
- Territory Management
- Files Sync and Share
- Sales Performance Management
- Partner Management

## Service Cloud

The goal of this Salesforce platform is to assist and

support clients. Keeping clients longer raises their level of satisfaction and loyalty.

*Its distinctive qualities include offering quicker service than more conventional techniques, attending to each customer's needs specifically, and proactively addressing problems raised by customers.*

In the end, that improves the client experience and fosters loyalty, both of which have a positive effect on sales.

## **Key Business Goals of Service Cloud**

The main business objectives met by utilizing the service cloud are listed below:

- **Personalized Service:** Provide each client with a positive experience in light of their particular issues, past purchases, and grievances.
- **Always-on Service:** Provide the service round-the-clock.
- **Multi-channel Support:** Provide multi-channel support by interacting with consumers via their preferred channels, such as chat, phone, or mobile.
- **Faster Support:** Delivering support services more quickly is made possible by managing different service needs from a single console.

## **Key Features of Service Cloud**

Here are the features of the service cloud:

- Console for Service
- Knowledge base
- Social Customer Service
- Live Agent
- Mobile Platform
- Service Cloud Communities

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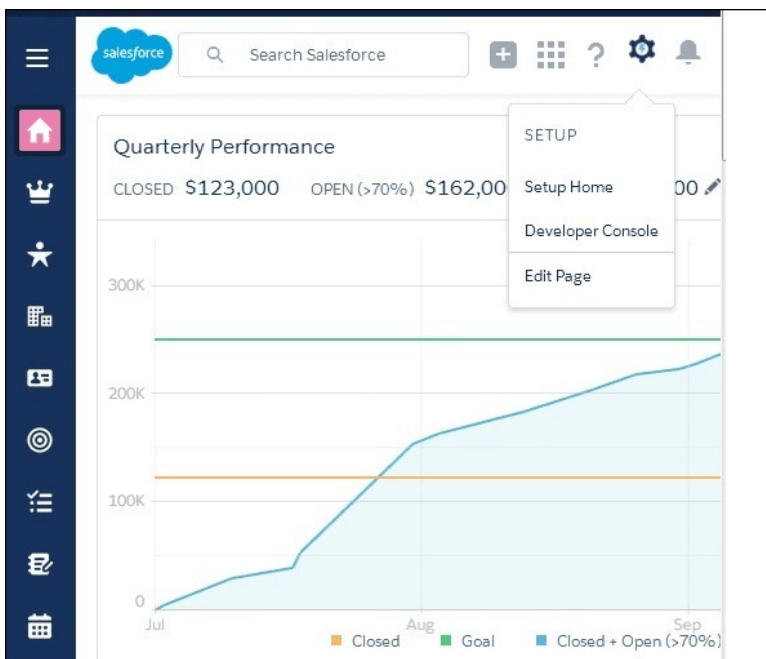
## **Salesforce Navigating Support**

The setup area is used by the Salesforce developer to build up and personalize the user experience.

- It is utilized to provide different capabilities and add and support additional users.
- To get to the same setup button, there are multiple ways.
- The Lightning User Interface on the Salesforce Home page is both contemporary and classic.
- We are speaking of the interface found in modern lighting.
- The majority of functionality is offered in both the traditional and lighting user interfaces, and both provide a wealth of capabilities that are helpful to users.

## Setup Location

The setup link is found in the upper right corner of the page in the picture below. We can access the setup home page by clicking on the setup home.



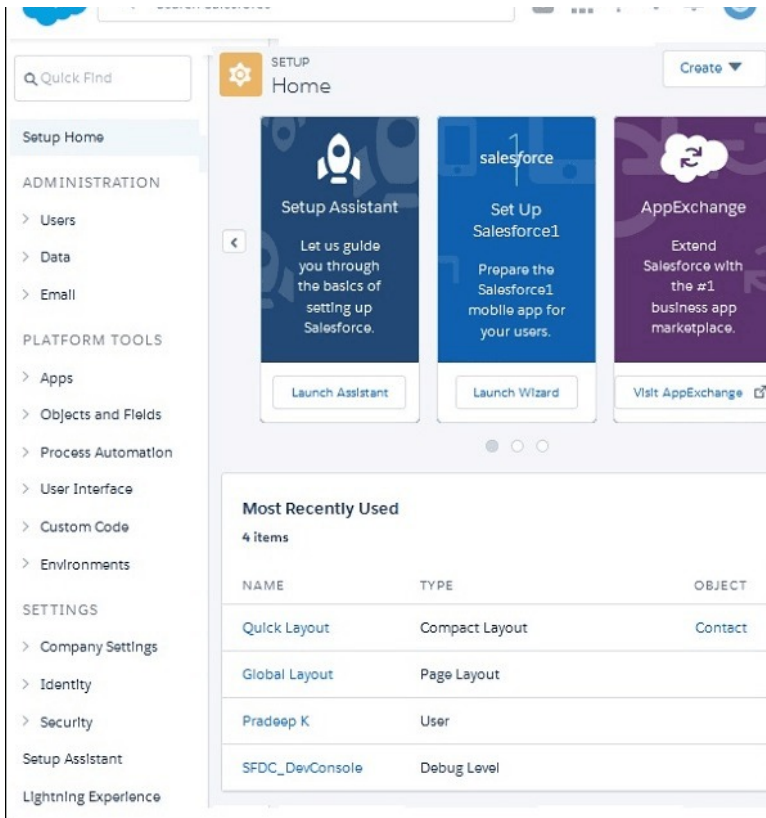
Salesforce tutorial 2

## Setup Home

The setup page is displayed below, and it contains every option that can be customized and configured by the developer.







Salesforce tutorial 3

## Setup Options

The key elements that are commonly utilized during setup are listed here:

- **Users:** Add, Remove, Assign. Control permissions and user profiles.
- **Company Settings:** Details about your organization. For example, language, domain, maps and locations, etc.
- **Security Measures:** They include session management, audit trail setup, expiry passwords, and access policies.
- **Environment:** Sandboxes, Jobs, and Logs.
- **Fields and Objects:** Schema Builder and Object Manager.
- **User Interface:** Lightning App Builder, Custom Labels, and App Menu comprise the user interface.
- **Custom Code:** Email Services, Remote Access, Custom Metadata Types, etc.
- **Analytics:** Dashboards and Reports for Analytics.

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### Salesforce Control Access

Different user types in an organization have access to different sorts of data. Salesforce offers the ability to restrict platform data access to certain users or groups of users.

Assigning distinct data sets to distinct user groups is made simple by a flexible yet tiered sharing mechanism. Access can also be specified at the level of a field, an organization, an object, or a single record.

### Levels of Data Access

There are four levels of data access.

- **Organization Level:** It starts by keeping track of approved users, establishing password guidelines, and restricting login access to specific times and places.
- **Objects Level:** This is accomplished by granting selective viewing, modification, or deletion of any object within a record by specifying permissions for that specific object.
- **Fields Level:** It is used to prevent people from accessing specific fields even while they can access the object that contains the field.
- **Records Level:** Only certain records of an object are accessible to users with this level of access.

### Create and Manage Users

Using the Admin Interface, administrators can create one or more users.

To access users, navigate to *Setup Home* → *Administration*.

The choices for adding one or more users are displayed.

#### Salesforce tutorial 4

Further information is requested from each user, including their name, email address, role, profile, etc. Users are created upon filling out those details.

### **Set Password Policies**

Password policies describe the organization's approach to managing passwords.

*For example, determining a password's complexity requirement, expiration date, and so forth. We have control over the lock of policies in addition to all these configurable choices.*

To configure these password policies, go to *setup home* → *Security* → *Password Policies*.

## Salesforce tutorial 5

### **Restricting Access from IP Address**

This additional security feature restricts access to the organization's Salesforce platform to a certain range of IP addresses.

*The system prompts for extra challenge questions that ought to have been set up beforehand whenever a legitimate user sees the restricted website from outside the trusted IP range.*

You may adjust this by going to *Setup Home* → *Security* → *Network Access*.

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### Objects in Salesforce

The Salesforce Platform stores data in relational tables. User-generated data and information on the platform's structure are both included in the records in these tables.

**Example:** A relational table containing the setup and settings for an account is already included.

However, if you are a courier service, you can also make your own tables to hold information unique to your organization, such as the "dispatch schedule" for a week.

In Salesforce, these relational tables are commonly referred to as just objects or API objects. Salesforce objects come in three different varieties:

- **Standard Objects:** These are the objects that the Salesforce platform has previously generated for you.
- **Custom Objects:** These are your own items made by your company procedures.
- **External Objects:** The objects you make correspond to the information kept off-site by your company.

### Standard Objects

These are objects that are already present in the Salesforce platform and are used to handle environment parameters and settings. You can view the accessible objects as soon as you log into the Salesforce platform.

#### **Example:**

The Account Object is the standard object that is most frequently mentioned. It is the item that keeps track of basic data on a client, associate, rival, or other business. By taking the actions listed below, we can investigate the account object.

**Step 1:** Go to the Salesforce site, log in, and click the provided link.

*Settings* → *Setup Home* → *Object Manager* – *Account*.

#### Salesforce tutorial 7

**Step 2:** Click the Schema Builder in this stage. The entire account table, complete with field names and data types, is displayed.

Red-marked fields are present. It is required to fill out the fields shown in red when creating an account.

We can explore every standard object that is offered by following the same procedures as above.

## Popular Standard Objects

Here are the frequently used standard objects in Salesforce:

- **Account:** To view and manage accounts inside your company, use this object.
- **Account History:** This item can be used to track account modifications.
- **Case:** To manage cases for your company, use the case object.
- **Contact:** Individuals connected to an account inside the company are managed using this object.
- **User:** This object enables to provide and alter user-related information as well as be used to query and offer information about users.
- **Asset:** Assets that have previously been sold into customer accounts are tracked using this item. A client application can easily ascertain which items have been sold in the past or are installed at a particular account by using asset tracking.
- **Domain:** You can query the domains linked to every website in your company by using this read-only object.

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## Custom Objects

The functionalities that are accessible on custom objects are listed below. The following functionalities are made possible by the features:

- When users contribute data for the custom object record, you can manage which fields they may view and change by building page layouts.
- Bring in records for bespoke objects.
- Make dashboards and reports to examine data from custom objects.
- To see the object's data, create a custom tab for the custom object.
- Observe events and actions related to custom object records.
- Bring in records for bespoke objects.

## Create a Custom Object

As seen in the screenshot below, we navigate to the line route to construct a custom object.



We now complete the details of the desired custom object. Before the object can be saved, some fields need to be filled out. In this instance, we save the object and give it the name Delivery Schedule.

Salesforce tutorial 10

## **Create a Custom Field**

We can add new fields to the custom object we constructed to provide the business data with additional specificity. In this instance, let's modify the delivery schedule custom object by adding a field called delivery date.

*We take the Setup Home → Objects and Fields → Object Manager → Deliver Schedule path to accomplish this.*

Then, click New after swiping down to the Fields and Relationship tab. When the page to add a custom field appears, we fill it out using the information below.

## Salesforce tutorial 11

The successful inclusion of the aforementioned custom field may then be confirmed by using the same link path. The image below illustrates how the custom field looks.

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## **Automating Business Process with Salesforce**

Business process automation is aided by the

process builder tool. For instance, after a courier delivery is finished, everything gets entered into a record. For this automation, the following three steps must be developed:

- Choose an object to initiate the procedure.
- To enable the process to begin, add criteria to the item.
- To start the process, add an action to the criteria.

### **Add object to start the process**

To access Process Builder, navigate to *Setup home* → *Platform Tools* → *Process Automation*. Select *New*.

The dialog that asks for the process name and description comes after you click *New*. After entering the data as displayed, we click *Save*.

We then receive a window for process automation. For the following step, click *New*. Moreover, select the *Object delivery timeline* from the list below. Select *“Save.”*

## Salesforce tutorial 14

### **Add Criteria**

To include a condition that must be met for the process to be permitted to run, click the Add Criteria button on the canvas. Here, we select the delivery date as the field that will start the procedure when it is updated. To save the criteria, click save.

## Salesforce tutorial 15

### **Add Action**

Next, we include an action that, upon the fulfillment

of the condition, initiates the procedure.

Salesforce tutorial 16

With this configuration, we are able to track the progress of a courier delivery by creating a record after it is finished.

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## Advantages of Salesforce

Salesforce provides companies with numerous advantages, such as:

- **Data analytics:** Salesforce gives organizations the ability to analyze consumer behavior and preferences, which can help them enhance their marketing plans and increase client loyalty.
- **Automation:** CRM tools like email marketing, lead capture, and lead scoring allow you to automate sales and marketing activities.
- **Cloud-based:** With a high level of security, Salesforce may be accessed from any location with an internet connection.
- **Scalability:** Salesforce's scalability supports the expansion of companies.

- **Integration:** Salesforce can integrate with a variety of current business applications.
- **Customer Service:** Salesforce has the potential to enhance customer service for enterprises.
- **Productivity:** Using AI, Salesforce can help boost productivity.
- **Collaboration:** Salesforce can facilitate collaboration by making it easier.
- **Salesforce's Customer 360** platform can assist companies in bringing their teams together around their clients.

## Conclusion

Salesforce helps with process automation, customer relationship management, and data management. Salesforce helps businesses improve client connections while saving time and money. We hope this Salesforce tutorial helps you understand the basics. Unveil the range of opportunities by enrolling in our [Salesforce training in Chennai](#).

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