

Welcome to Salesforce

Learning Objectives

After completing this unit, you'll be able to:

- Discover best practices for users new to Salesforce.
- Explain what Salesforce is and why you should use it.
- Describe how Salesforce objects are related and when to use each one.

Introduction

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

If your data is stored in spreadsheets, hidden in emails or text messages, or pinned to your bulletin board, it's hard to get the full picture of your prospective customer. And you certainly can't access the data from anywhere, anytime, nor can your manager or executives see your progress on deals in flight, at least not without calling you for a status update.

Salesforce takes all of that important data and organizes it into a simple user interface. It's one place for you to:

- Manage all your contacts
- Work with your prospective customers
- Organize tasks and to-do items
- Focus on the right deals

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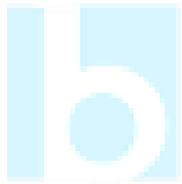
- Collaborate with your team
- Showcase your big wins
- Close more business

Simply put, Salesforce is one place for you to do stuff. And because it's stored on our secure cloud, you can access your data anytime, anywhere, whether you're on desktop or mobile.

When everything's in Salesforce, you don't need to worry about the note you left on your desk, or a file you have stored on your hard drive. You can find everything you need simply by logging in.

In addition, you no longer need to worry about updating your manager on how things are going with your top deals in flight. Instead, your manager can just log into Salesforce and see the latest data in real time.

This visibility is one of the key benefits of Salesforce. But rest assured, there are powerful security and sharing features that protect sensitive data and ensure the right folks see the right data.



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