



CRM automatizálás Salesforce-szal

8. hét

PUSKÁS DÓRA, SALESFORCE MENTOR



Agenda

- Session 1-7 – rövid áttekintés
- Salesforce Marketplace
- Jutalmak a Trailhead-en!
- Még több tanulás – Admin CERT
- Teszteld a tudásod!
- Jelentkezés a vizsgára
- Karrierlehetőségek (+LinkedIn)

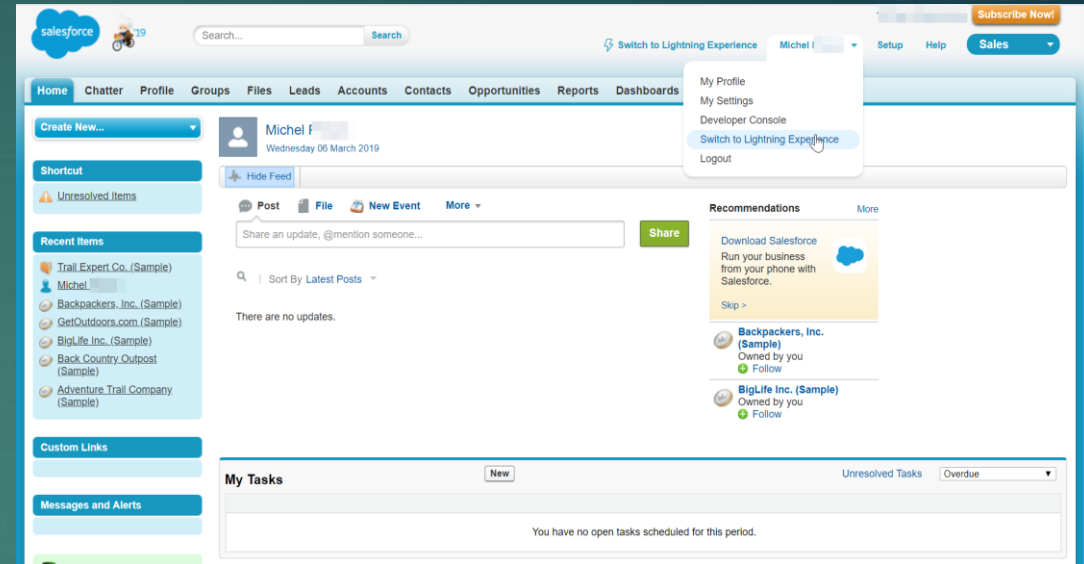
Session 1

- Salesforce alapok
 - Történet
 - Cloud-ok
 - Edition-ök
 - Alapfogalmak (Terminology)
- E-learning → Trailhead
 - Trailblazer Account
 - Playground
 - Salesforce basics – ismerkedés a platformmal



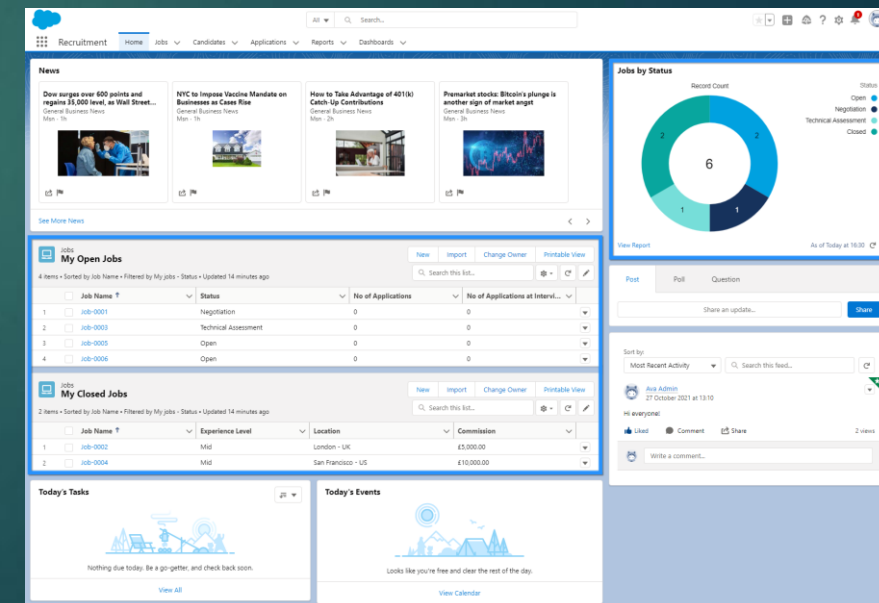
Session 2

- Salesforce Org
 - Szervezeti információk
 - Licencek (user, feature, ...)
 - Valuták kezelése (Advanced /Multi Currency)



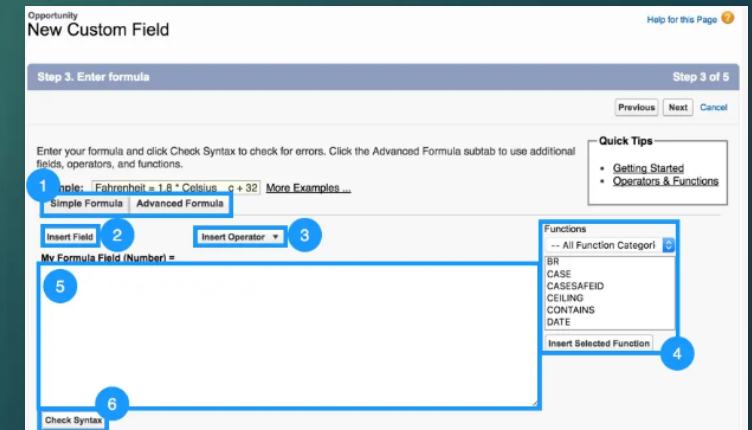
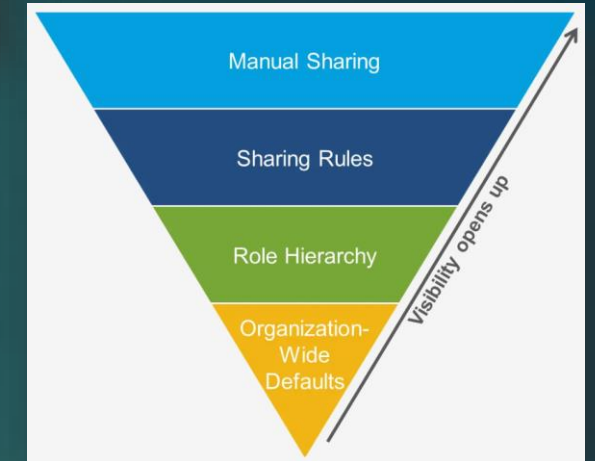
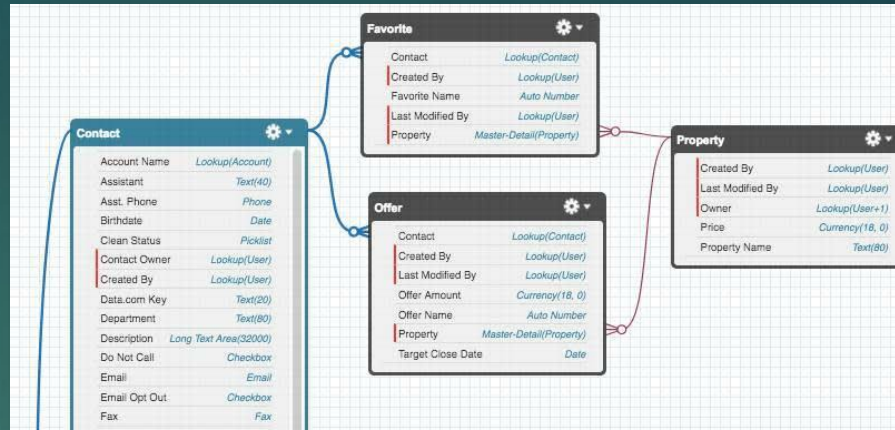
- Classic / Lightning
 - App
 - Listanézetek
 - Egyedi objektumok+rekordok

- Felhasználók / jogosultságok



Session 3

- Adatmodellezés
 - Objektum típusok / mezők / Obj kapcs.
- Adatbiztonság
 - Org-Wide / Sharing settings / Role Hierarchy / Sharing Rules / Manual sharing
 - Audit / Password Policies / IP ranges / Login
- Objektumok testreszabása



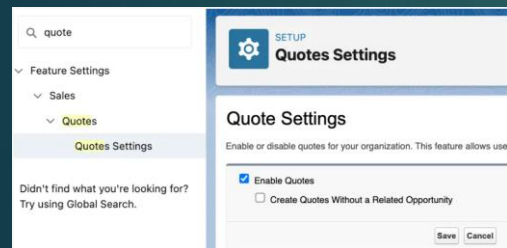
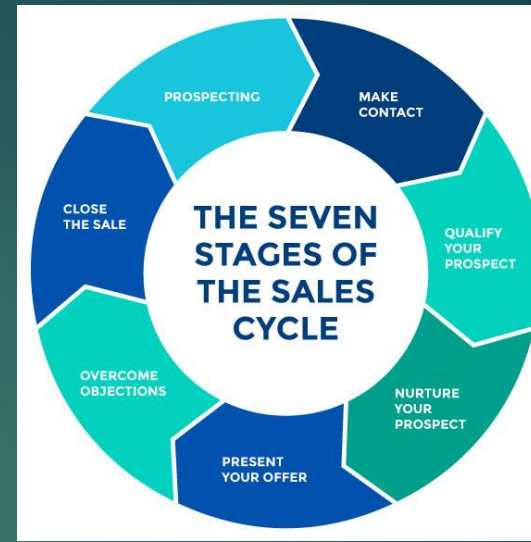
The screenshot shows the 'New Custom Field' wizard in Salesforce, specifically Step 3: Enter formula. The interface includes a 'Simple Formula' tab and an 'Advanced Formula' tab. The 'Simple Formula' tab is active, showing a formula editor with a text input field containing 'Fahrenheit = 1.8 * Celsius + 32'. There are numbered callouts (1-6) highlighting various parts of the interface: 1 points to the formula input field, 2 points to the 'Insert Field' button, 3 points to the 'Insert Operator' button, 4 points to the 'Functions' dropdown menu, 5 points to the 'My Formula Field (Number) =' label, and 6 points to the 'Check Syntax' button. A 'Quick Tips' box on the right provides additional guidance.

Session 4

Értékesítés – Sales Cloud

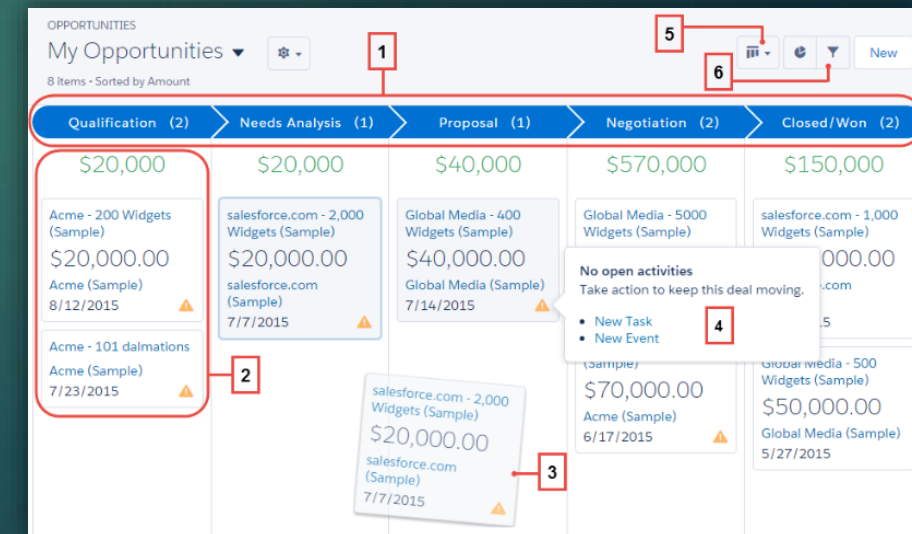
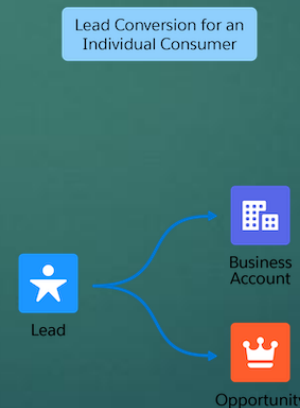
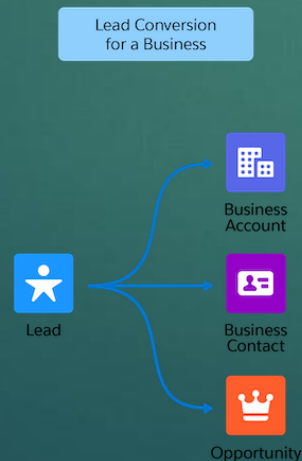
• Főbb Objektumok

- Account, Contact
- Lead, Opportunity + Lead conversion
- Product, Quote, Contract



Screenshot of the Sales Cloud Price Book interface showing a table of Price Book Entries. The table has columns for Product Name, Product Code, List Price, and Active status.

Product Name	Product Code	List Price	Active
GenWatt Diesel 1000kW	GC1060	\$100,000.00	☒
GenWatt Diesel 10kW	GC1020	\$5,000.00	☒
GenWatt Diesel 200kW	GC1040	\$25,000.00	☒
GenWatt Gasoline 2000kW	GC5060	\$150,000.00	☒
GenWatt Gasoline 250kW	GC5025	\$125.00	☒
GenWatt Gasoline 300kW	GC5020	\$35,000.00	☐

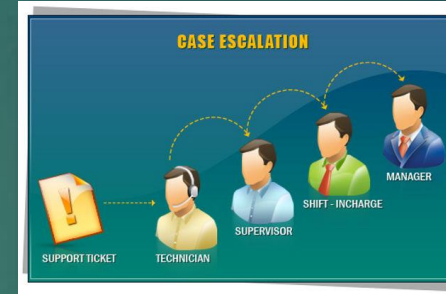


Session 5

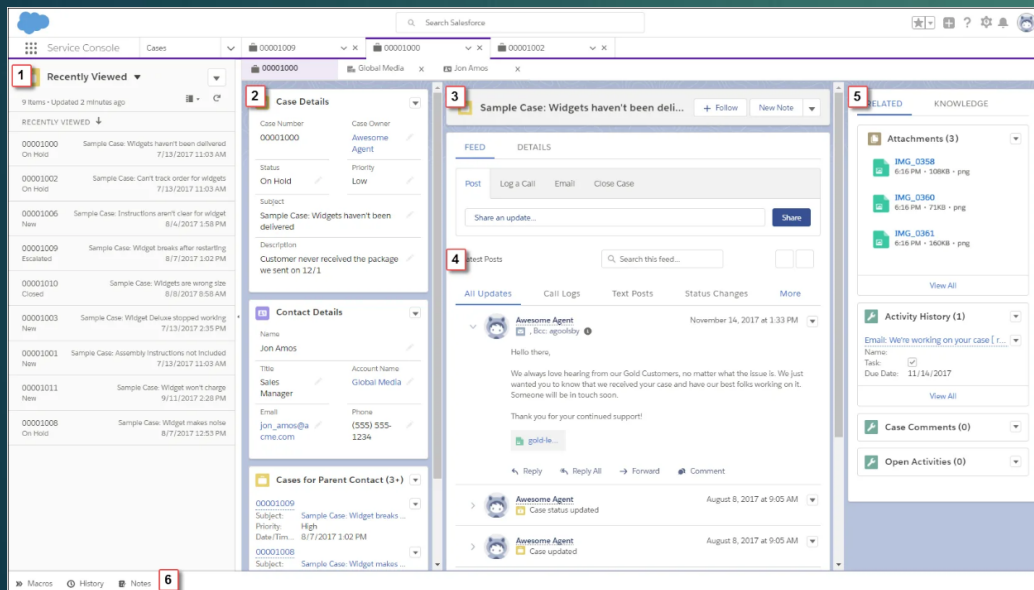
Ügyfélszolgálat – Service Cloud

- Főbb Funkciók

- Omni-Channel
- Case Management
- Queue
- Assignment & Escalation & Auto-response Rules

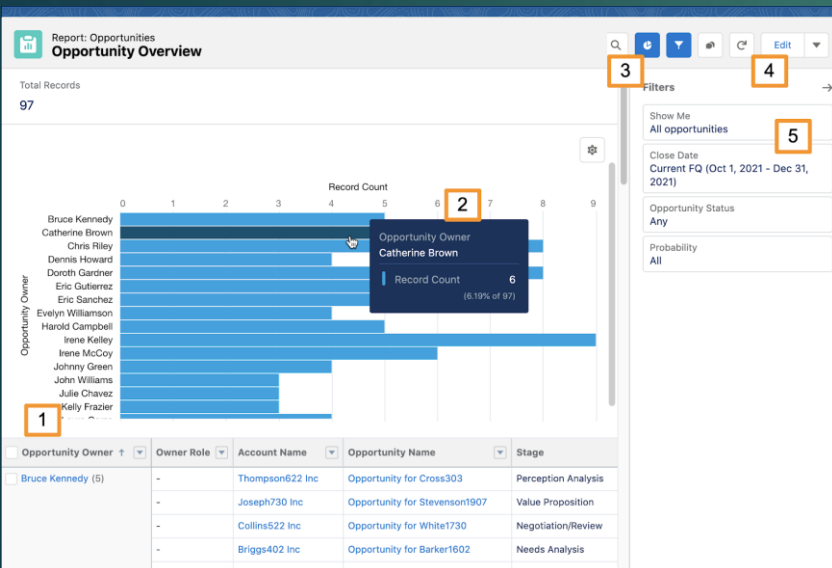
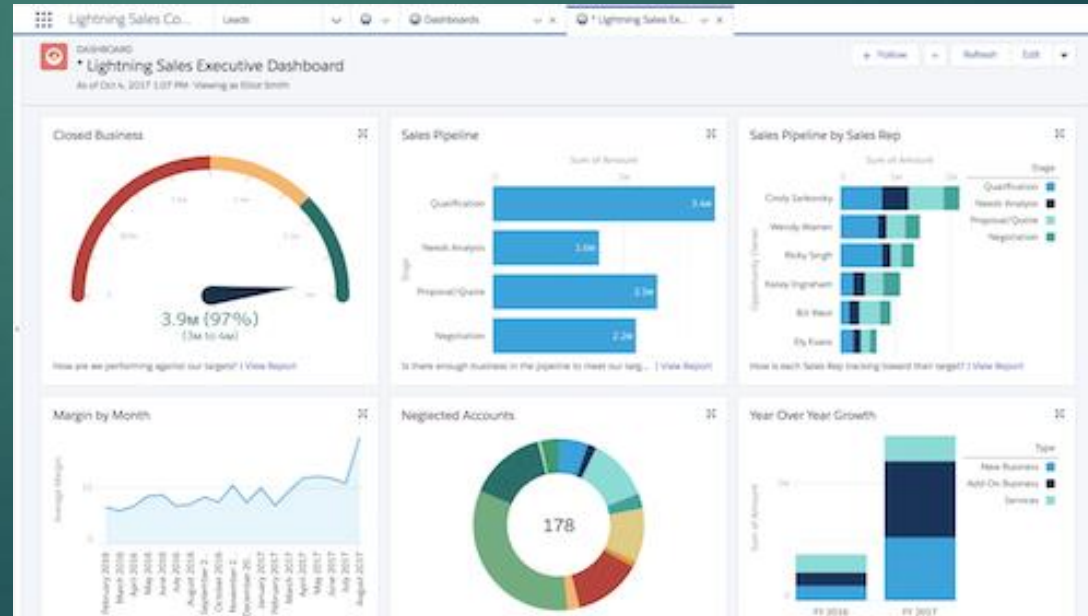
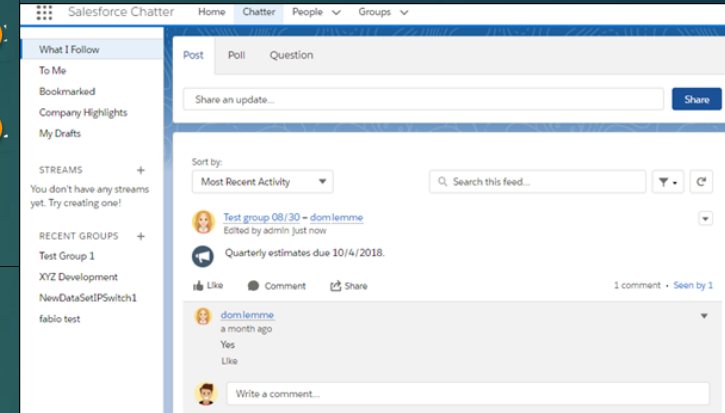
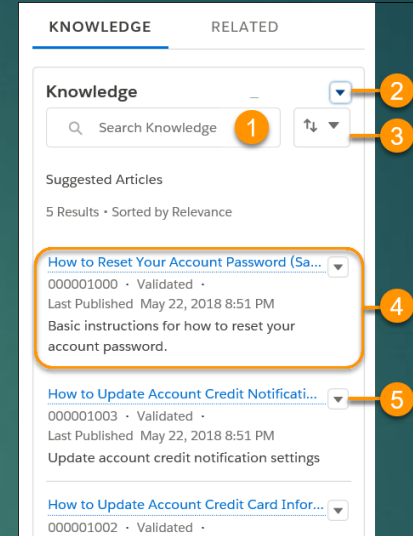


- Web-to-Case
- Knowledge



Session 6

- Knowledge & Chatter
- Reports & Dashboards
 - Tabular
 - Summary
 - Matrix
 - Running User
 - Dynamic Dashboard

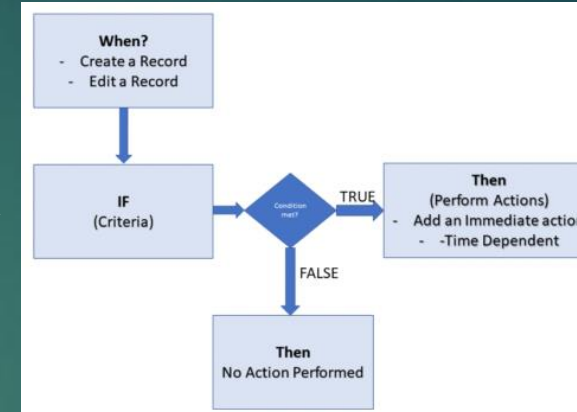


Session 7

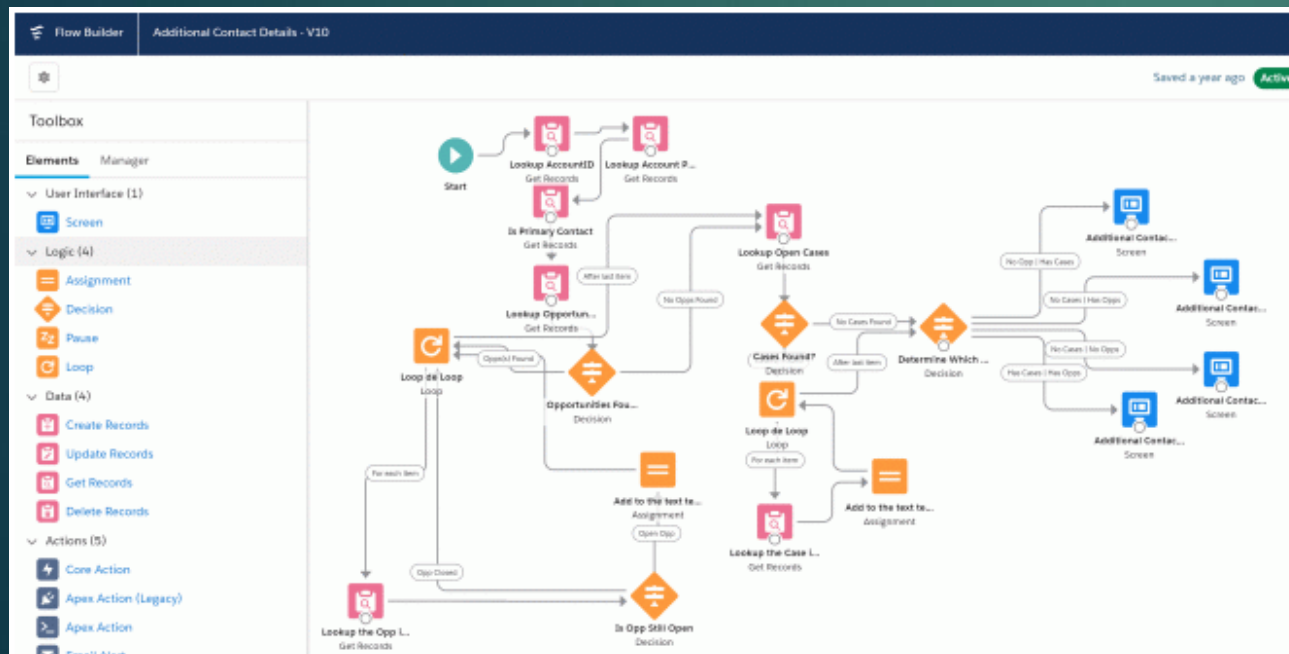
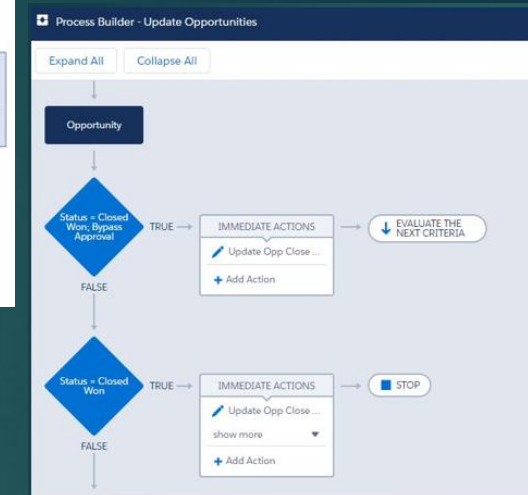


Mentor Klub

- Automatizációs eszközök
 - Workflow Rule & Process Builder
 - Flow
 - Approval Process
 - Apex



```
1 public class TaskUtil {
2     public static String getTaskPriority(String leadState) {
3         // Validate input
4         if (String.isBlank(leadState) || leadState.length() > 2) {
5             return null;
6         }
7
8         String taskPriority;
9
10        if (leadState == 'CA') {
11            taskPriority = 'High';
12        } else if (leadState == 'WA') {
13            taskPriority = 'Low';
14        } else {
15            taskPriority = 'Normal';
16        }
17
18        return taskPriority;
19    }
20 }
```



Salesforce Marketplace

- AppExchange

<https://appexchange.salesforce.com/>



Jutalmak a Trailhead-en!

- Trailhead Rank / Profile

<https://www.salesforce.com/trailblazer/profile>



- Quests

<https://trailhead.salesforce.com/quests>



- Superbadges

<https://trailhead.salesforce.com/superbadges>



Még több tanulás – Admin CERT

- Prepare for Your Salesforce Administrator CERT



<https://trailhead.salesforce.com/users/strailhead/trailmixes/prepare-for-your-salesforce-administrator-credential>

- CERT coupons / vouchers



<https://www.salesforceben.com/salesforce-certification-coupon/>

- CERT days

<https://trailhead.salesforce.com/en/credentials/cert-days/>



Teszteld a tudásod!

- Free Practice Test

https://developer.salesforce.com/files/ti/thi/THI-000393/administratorpracticetest.html?_ga=2.90581402.1602714639.1708249018-596985614.1708066130

Administrator Practice Test

- Focus On Force (FoF)

<https://focusonforce.com/>



- Udemy

<https://www.udemy.com/>



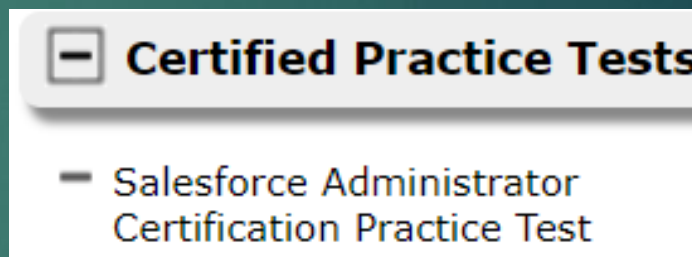
Jelentkezés a vizsgára

- Kryterion

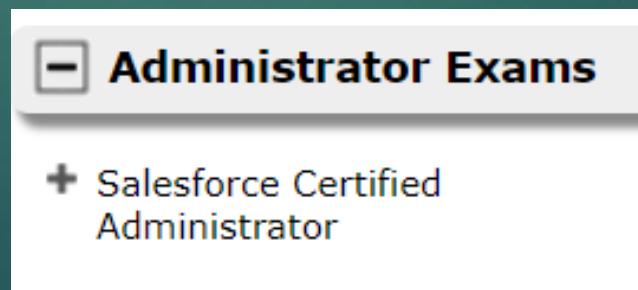


<https://www.webassessor.com/salesforce>

- Certified Practice Test



- Book exam + ET



CERT frissítése

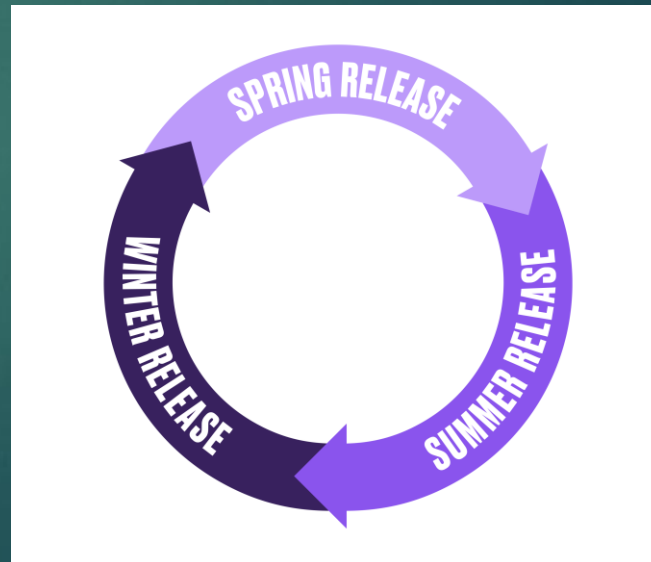
- Salesforce Releases Updates

<https://www.salesforceben.com/ultimate-guide-to-salesforce-release-updates/>

Summer '24:

<https://www.salesforceben.com/salesforce-summer-24-release-date-preview-information>

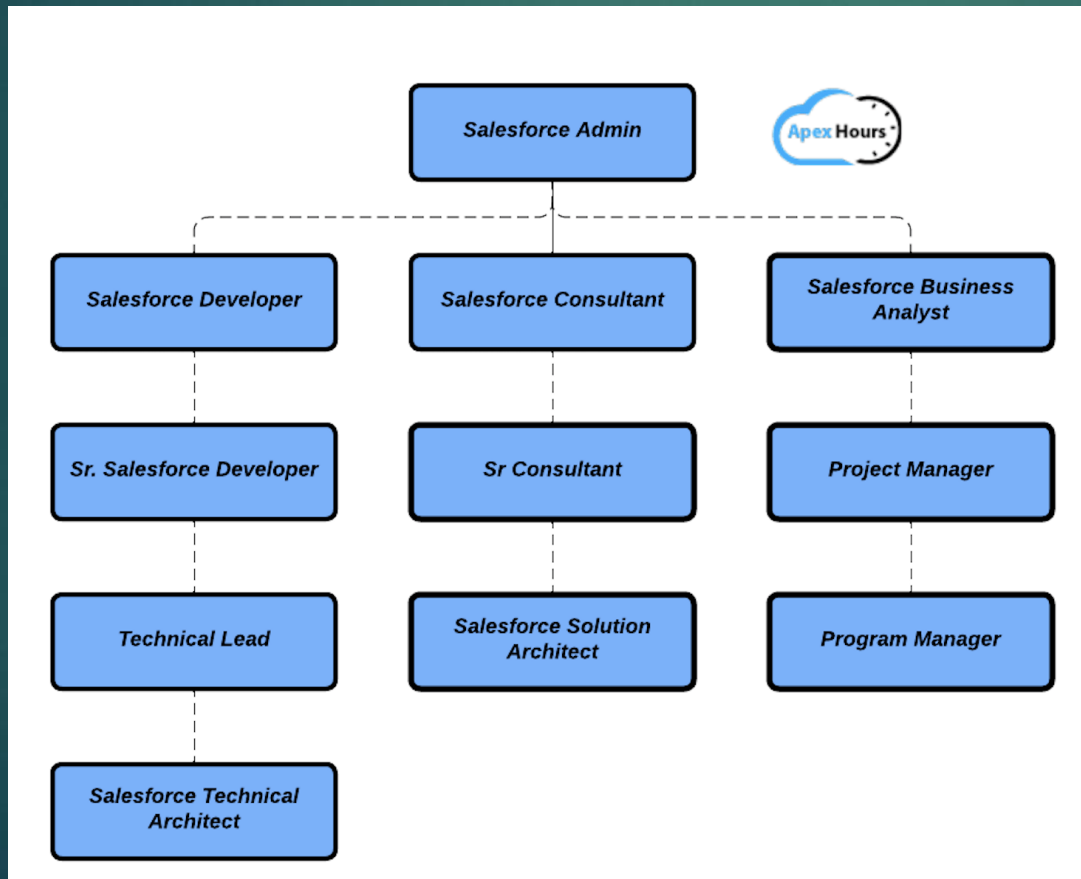
- CERT Maintenance



Karrierlehetőségek (+LinkedIn)

Salesforce Career / CERT path

<https://www.salesforceben.com/salesforce-certification-pathways/>



LinkedIn

Profil frissítés

<https://www.superqbit.com/app/?id=salesforce-header-creator>

Köszönöm a figyelmet!

Puskás Dóra

Salesforce Admin, Business Analyst & Mentor

LinkedIn: <https://www.linkedin.com/in/dorapuskas/>



KÉRLEK, ÉRTÉKELJÉTEK A KÉPZÉST!

<https://mentorklub.gerillaoneletrajz.hu/tanfolyam/belepes-a-salesforce-vilagaba-az-alapoktol-az-admin-vizsgaig-8-hetes-kepzes/>