



Salesforce.com Customization Handbook

Customize Salesforce to automate your business requirements

Rakesh Gupta

Sagar Pareek

[PACKT] enterprise⁸⁸
PUBLISHING professional expertise distilled

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Jin-Ying Zhang



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Salesforce.com Customization Handbook Rakesh Gupta, Sagar Pareek, 2014-09-12 If you want to use Salesforce CRM to automate your business requirements or you have already adopted Salesforce CRM and want to streamline the sales process this book is for you Whether you are new to Salesforce or a seasoned expert you will be able to master the basic functions as well as the advanced features of Salesforce com No previous experience in computer coding or programming is required

Salesforce.com Customization Handbook Rakesh Gupta, Sagar Pareek, 2014-09-12 If you want to use Salesforce CRM to automate your business requirements or you have already adopted Salesforce CRM and want to streamline the sales process this book is for you Whether you are new to Salesforce or a seasoned expert you will be able to master the basic functions as well as the advanced features of Salesforce com No previous experience in computer coding or programming is required

Learning Salesforce Visual Workflow Rakesh Gupta, 2015-04-29 Learning Salesforce Visual Workflow is intended for those who want to use Flows to automate their business requirements by click not code Salesforce maintains an incredibly user friendly interface no previous experience in computer coding or programming is required

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Learning Force.com Application Development Chamil Madusanka, 2015-04-27 If you are a developer who wants to learn how to develop and deploy

applications from the Salesforce.com platform then this book is for you No prior knowledge of Salesforce is necessary

Learning Salesforce Visual Workflow and Process Builder Rakesh Gupta, 2017-05-18 Click your way to automating various business processes using Salesforce Visual Workflow About This Book Develop an application using Point and Click with the help of Flow Get to grips with various ways to launch a Flow Capture data from an external user without using the Visualforce page Save user input into the database and learn how to query and manipulate the data Discover various ways to debug and deploy Flow and Process Builder Understand the concepts of Subflow and Login Flow Handle complex business processes using Process builder and keep them clean Use existing or new Flows to work with Salesforce Lightning Experience Who This Book Is For This book is intended for those who want to use Flows to automate their business requirements by clicking not coding No previous experience in computer coding or programming is required What You Will Learn Develop an application using point and click with the help of Flow Get to grips with various ways to launch a Flow Capture data from an external user without using the Visualforce page Save user input into the database and learn how to query and manipulate the data Discover various ways to debug and deploy Flow and Process Builder Understand the concepts of Subflow and Login Flow Handle complex business processes using Process builder and keep them clean Use existing or new Flows to work with Salesforce Lightning Experience In Detail Salesforce Management System is an information system used in CRM to automate the business processes like sales and marketing To implement this Force.com developed a powerful tool called Visual Workflow to automate business processes by creating applications also called Flows Learning Salesforce Visual Workflow Second Edition is a practical guide on Flows that will enable you to develop custom applications in Salesforce with minimized code usage The book starts with an introduction to Visual Workflows that teaches all the building blocks of creating Flows and use it efficiently You will learn how to easily automate business processes and tackle complex business scenarios using Flows The book explains the working of the Process Builder so you can create reusable processes The book also covers how you can integrate existing or newly created Flows with the Salesforce Lightning Experience By the end of the book you will get a clear understanding on how to use Flows and Process Builder in your organization to optimize code usage Style and approach Step by step approach to use Process Builder to solve complex business requirements with the help of Flow [Mastering Application Development with Force.com](#) Kevin J.

Poorman, 2016-01-28 Design and develop state of the art applications using Force.com's powerful development platform About This Book Flaunt your skillsets by developing complex applications that include demanding concepts such as triggers Visualforce controllers batch jobs and Lightning components Earn the gratitude of your colleagues by structuring a project so that multiple developers can work independently of each other Kevin Poorman the author of the book and a Force.com MVP shares his years of Force.com knowledge and experience with you through the medium of telling examples Who This Book Is For If you're a Force.com developer with a fundamental understanding of Apex and JavaScript but now want to enhance your

skills with tips tricks and guidance on the best architectural and engineering practices then this book is for you What You Will Learn Creating triggers and the best practices for writing them Developing a number of Visualforce controllers and extensions Integrating third party web APIs into your Apex code Writing unit tests that cover testing bulk safety user and profile settings and negative tests Creating a Lightning component for use in Salesforce1 Getting acquainted with various methods for deploying metadata between orgs Using the Rest sObject API for access to Salesforce objects and data using the REST methodology Learning about overarching architectural considerations such as naming conventions testing practices and data modeling practices In Detail Force.com is an extremely powerful scalable and secure cloud platform delivering a complete technology stack ranging from databases and security to workflow and the user interface With salesforce.com's Force.com cloud platform you can build any business application and run it on your servers The book will help you enhance your skillset and develop complex applications using Force.com It gets you started with a quick refresher of Force.com's development tools and methodologies and moves to an in depth discussion of triggers bulkification DML order of operations and trigger frameworks Next you will learn to use batchable and schedulable interfaces to process massive amounts of information asynchronously You will also be introduced to Salesforce Lightning and cover components including backend apex controllers frontend JavaScript controllers events and attributes in detail Moving on the book will focus on testing various apex components what to test when to write the tests and most importantly how to test Next you will develop a changeset and use it to migrate your code from one org to another and learn what other tools are out there for deploying metadata You will also use command line tools to authenticate and access the Force.com Rest sObject API and the Bulk sObject API additionally you will write a custom Rest endpoint and learn how to structure a project so that multiple developers can work independently of each other without causing metadata conflicts Finally you will take an in depth look at the overarching best practices for architecture structure and engineering code applications on the Force.com platform Style and approach A step by step tutorial with plenty of tips and tricks that will help you develop complex Force.com applications

Salesforce Platform App Builder Certification Rakesh Gupta, 2019-12-16 New or intermediate developers will want to use this hands on guide to prepare for the Salesforce Certified Platform App Builder credential awarded for designing building and implementing applications using the declarative customization capabilities of the Salesforce Platform This is the first book available covering this content and Salesforce training is very costly This book is filled with real world examples and hands on exercises enabling you to prepare for the certification exam in a short span of time Multiple choice study questions and exercises are included to help you apply what you learn in each chapter Author Rakesh Gupta explains Salesforce Platform fundamentals including knowledge about the limitations of the declarative platform and when to use programmatic development versus the AppExchange Data management and data analytics are covered And you will learn how to set up organization wide features that affect the look and feel of your application Sandbox design patterns and

process automation tools available in Salesforce are discussed and you will know when to use them You will become familiar with a wide array of topics including designing a mobile app and reporting in Salesforce What You Will Learn Know when to use declarative development versus programmatic development versus the AppExchange Understand the Salesforce data model field type when to use which fields and how and when to use an external object in Salesforce Be familiar with security and settings in Salesforce See how easily users can migrate to the Lightning experience from the classic platform Implement business process automation using declarative features Apply the automation process in Salesforce Utilize Process Builder and manage its power to automate business processes Use sandboxes and deployment tools Who This Book Is For New or intermediate Salesforce developers or anyone in the Salesforce development arena who wants to learn or explore the platform

Salesforce Platform App Builder Certification Rakesh Gupta,2019-12-17 New or intermediate developers will want to use this hands on guide to prepare for the Salesforce Certified Platform App Builder credential awarded for designing building and implementing applications using the declarative customization capabilities of the Salesforce Platform This is the first book available covering this content and Salesforce training is very costly This book is filled with real world examples and hands on exercises enabling you to prepare for the certification exam in a short span of time Multiple choice study questions and exercises are included to help you apply what you learn in each chapter Author Rakesh Gupta explains Salesforce Platform fundamentals including knowledge about the limitations of the declarative platform and when to use programmatic development versus the AppExchange Data management and data analytics are covered And you will learn how to set up organization wide features that affect the look and feel of your application Sandbox design patterns and process automation tools available in Salesforce are discussed and you will know when to use them You will become familiar with a wide array of topics including designing a mobile app and reporting in Salesforce What You Will Learn Know when to use declarative development versus programmatic development versus the AppExchange Understand the Salesforce data model field type when to use which fields and how and when to use an external object in Salesforce Be familiar with security and settings in Salesforce See how easily users can migrate to the Lightning experience from the classic platform Implement business process automation using declarative features Apply the automation process in Salesforce Utilize Process Builder and manage its power to automate business processes Use sandboxes and deployment tools Who This Book Is For New or intermediate Salesforce developers or anyone in the Salesforce development arena who wants to learn or explore the platform

Learning Salesforce Visual Workflow Rakesh Gupta,2015-05-04 **Salesforce Process Builder Quick Start Guide** Rakesh Gupta,2018-07-24 Click your way to automating business processes with Salesforce Visual Workflow Key Features Create and maintain complex business processes using Process builder Discover how to debug and deploy Flow and Process Builder Use new or existing Flows to work with Salesforce Lightning Experience Book Description Salesforce Management System is an information system used in CRM to automate business processes such as sales and marketing

Process Builder is a visual tool created to automate business processes in Salesforce. It enables users with no coding expertise to build complex Salesforce workflows. The book starts with an introduction to Process Builder focussing on the building blocks of creating Processes. Then you will learn about different applications of Process Builder for developing streamlined solutions. You will learn how to easily automate business processes and tackle complex business scenarios using Processes. The book explains the workings of the Process Builder so that you can create reusable processes. It also explains how you can migrate existing Workflow Rules to Process Builder. By the end of the book you will have a clear understanding of how to use Flows and Process Builder to optimize code usage. What you will learn: Develop an application using point and click with the help of Process Builder. Bypass Processes for specific users. Understand the concepts of reusable processes. Handle complex business processes using Process Builder and keep them clean. Work with formulae in Process Builder to minimize the code required. Create a process with no criteria so as to minimize the amount of rework. Overcome Salesforce's known limitation in terms of referencing picklist values. Who this book is for: This book is for people who want to use Process Builder to automate their business requirements by clicking not coding. A basic understanding of Salesforce is required but not extensive programming knowledge.

Salesforce Platform App Builder Certification Companion Rakesh Gupta, 2025-03-06

Salesforce Platform App Builder Certification second edition is a comprehensive guide for budding and intermediate developers aiming to deepen their understanding of Salesforce. This book will start with the basics of Salesforce, shedding light on the limitations of its declarative platform and guiding readers on when to choose programmatic development or explore App Exchange solutions. The journey through the book will then delve into various configurations like data management and analytics, segueing into how to customize the application's appearance and functionality at an organizational level. Subsequent chapters will explore enterprise sandbox design patterns, process automation tools within Salesforce, and their appropriate applications. Finally, the book will tackle designing mobile-compatible applications and delve into Salesforce reporting. This book's uniqueness lies in its focus on a niche yet crucial area of Salesforce, a domain where existing literature is sparse and formal training can be prohibitively expensive. By incorporating real-world examples, practical exercises, and multiple-choice questions, this guide will equip readers for the Platform App Builder certification, offering a comprehensive and efficient preparation tool. This second edition of the book is especially timely as it updates content to reflect the latest developments and features in Salesforce.

What You Will Learn: Gain expertise in designing, constructing, and launching tailor-made applications utilizing the Force.com platform's declarative customization features. Understand the Salesforce data model, field type, when to use which fields, and how and when to use an external object in Salesforce. Be familiar with security and settings in Salesforce. Gain skills in creating data models, managing security, and automating business logic. Prepare for the Platform App Builder exam. Learn and understand the latest Salesforce interface, the Lightning Experience.

Learning Salesforce Visual Workflow and Process Builder - Second Edition Rakesh Gupta, 2017-05-18

Click your way to automating various business processes using Salesforce Visual Workflow

About This Book Develop an application using Point and Click with the help of Flow Get to grips with various ways to launch a Flow Capture data from an external user without using the Visualforce page Save user input into the database and learn how to query and manipulate the data Discover various ways to debug and deploy Flow and Process Builder Understand the concepts of Subflow and Login Flow Handle complex business processes using Process builder and keep them clean Use existing or new Flows to work with Salesforce Lightning Experience Who This Book Is For This book is intended for those who want to use Flows to automate their business requirements by clicking not coding No previous experience in computer coding or programming is required What You Will Learn Develop an application using point and click with the help of Flow Get to grips with various ways to launch a Flow Capture data from an external user without using the Visualforce page Save user input into the database and learn how to query and manipulate the data Discover various ways to debug and deploy Flow and Process Builder Understand the concepts of Subflow and Login Flow Handle complex business processes using Process builder and keep them clean Use existing or new Flows to work with Salesforce Lightning Experience

In Detail Salesforce Management System is an information system used in CRM to automate the business processes like sales and marketing To implement this Force.com developed a powerful tool called Visual Workflow to automate business processes by creating applications also called Flows Learning Salesforce Visual Workflow Second Edition is a practical guide on Flows that will enable you to develop custom applications in Salesforce with minimized code usage The book starts with an introduction to Visual Workflows that teaches all the building blocks of creating Flows and use it efficiently You will learn how to easily automate business processes and tackle complex business scenarios using Flows The book explains the working of the Process Builder so you can create reusable processes The book also covers how you can integrate existing or newly created Flows with the Salesforce Lightning Experience By the end of the book you will get a clear understanding on how to use Flows and Process Builder in your organization to optimize code usage

Style and approach Step by step approach to use Process Builder to solve complex business requirements with the help of Flow

Developing Applications with Salesforce Chatter Rakesh Gupta, Sagar Pareek, 2013-11 This book follows a hands on approach which will help newbies to easily understand the concepts of Salesforce Chatter and its configuration easily For advanced users this book has few approaches and code snippets to help you make Salesforce Chatter more responsive and productive Having fundamental knowledge of Apex and Visualforce pages will be helpful This book is intended for people who are newbies in the Salesforce arena and who want to boost collaboration in their organization using Chatter After reading this book you will be able to configure Chatter all on your own but for customization tasks such as improving the user interface you will need a basic understanding of Apex and Visualforce pages

Salesforce CRM - The Definitive Admin Handbook Paul Goodey, 2019-04-27 A definitive guide covering all the core concepts necessary to pass the Salesforce Administrator Certification exam Key Features Understand critical

design considerations for setting up Salesforce CRM Facilitate and manage the transition from Salesforce Classic to Lightning Experience Learn key functions of application security to manage user profiles and data Book Description Salesforce's winter 19 release offers a host of new features for CRM designed to meet your sales and marketing requirements With this comprehensive guide to implementing Salesforce CRM administrators of all levels can easily get a thorough understanding of the platform This Salesforce handbook begins by guiding you in setting up users and security and then progresses to configuration data management and data analytics You'll discover process automation and approval mechanisms while also exploring the functional areas of Sales Cloud Service Cloud Marketing Cloud and Salesforce Chatter This book covers Salesforce CRM system administration in a practical way and it'll serve as an invaluable reference for both new administrators and experienced professionals Furthermore you'll also delve into Salesforce mobile apps and mobile administration along with Salesforce Adoption Manager You'll gain insights into Lightning Experience Salesforce's new app and learn how its modern design and sleek interface helps you to build customizable components Finally we'll see how the two versions compare and help manage the transition from Salesforce Classic to Lightning Experience By the end of the book you will have mastered the techniques to configure and control various user interface features in Salesforce CRM What you will learn Configure a variety of user interface features in Salesforce CRM Understand the capabilities of the Salesforce CRM sharing model Explore Einstein Analytics Salesforce's new wave of advanced reporting Get to grips with the Lightning Process Builder workflow Set up user profiles security and login access mechanisms Find out how Apex and Visualforce coding can be used in Salesforce CRM Manage the transition from Salesforce Classic to Lightning Experience Implement data manipulation features to apply best practices in data management Who this book is for This book is for administrators who want to develop and strengthen their Salesforce CRM skills in the areas of configuration and system management Whether you are a new or experienced professional this book will enhance your knowledge and understanding of Salesforce CRM features

Salesforce CRM - The Definitive Admin Handbook Paul Goodey, 2016-12-21 Learn how to successfully administer build and manage Salesforce CRM and Salesforce mobile solutions using real world and best practice techniques About This Book See the latest best practice Salesforce administration principles gain real world advice and understand critical design considerations to set up and customize Salesforce CRM This is a pragmatic guide to the key functions of customizing and setting up the application for enterprise security user and data management process automation analytics and mobile features Step by step navigation and descriptions of the features of Salesforce CRM platform and clear guidance on the customization and administration of the application Identify what is covered to create your own improved study guide for the certified administrator examination Who This Book Is For This book is for administrators who want to develop and strengthen their Salesforce CRM skills in the areas of configuration and system management Whether you are a new administrator or a more experienced professional this book will enhance your knowledge and understanding of the features

of Salesforce CRM What You Will Learn Manage and administer user records and password policies Configure and control the various organization wide user interface features in Salesforce CRM Set up and maintain users profiles and permission sets and administer appropriate security and login access mechanisms Apply organization security Understand the capabilities of the Salesforce CRM sharing model Create delete and customize fields page layout and list views for custom and standard objects Find out how Apex and Visualforce coding can be used in Salesforce CRM Implement the mechanisms for data management Discover the tools to import update transfer and mass delete data In Detail Salesforce CRM s Winter 17 release offers a host of new features for CRM designed to transform your sales and marketing requirements With this comprehensive guide to implementing Salesforce CRM administrators of all levels can easily acquire deep knowledge of the platform The book begins by guiding you through setting up users and the security settings and then progresses to configuration data management and data analytics We swiftly move on to the setting up of organization wide features that affect the look and feel of the application Process automation and approval mechanisms are covered next along with the functional areas of Sales Cloud Service Cloud Marketing Cloud and Salesforce Chatter This book details Salesforce CRM system administration in a practical way and is an invaluable reference for both new administrators and experienced professionals At the end of the book techniques to further enhance the system and improve the return on investment Salesforce mobile apps and mobile administration are covered along with Salesforce Adoption Manager Every chapter is complete with a section containing example questions of the type that you might encounter in the certification examination Style and approach This book takes a straightforward no nonsense approach to working with the Salesforce CRM platform Filled with examples and use cases the book presents the facts along with seasoned advice and real world examples to ensure you have all the resources you need to become a more informed Salesforce Administrator

Salesforce CRM Administration Handbook Krzysztof Nowacki, Mateusz Twarożek, 2024-04-30 Master the core concepts of Salesforce administration and gain a holistic understanding of the SF ecosystem that will also help you prepare for the Salesforce certification exam Key Features Understand Salesforce architecture and security model Integrate Flow Builder with other Salesforce components for seamless automation Understand how to create and manage approval workflows in Salesforce Purchase of the print or Kindle book includes a free PDF eBook Book Description Do you aspire to be a successful Salesforce administrator or consultant If yes then this step by step guide is for you Written by certified Salesforce professionals the Salesforce CRM Administration Handbook will take you through the intricacies of Salesforce covering objects records automation and much more while also prepping you for the Salesforce certification exam Starting with an overview of the capabilities and limitations of Salesforce you ll progress toward a holistic understanding of system architecture with real world examples including workarounds that enable the successful completion of projects As you delve deeper you ll learn about the fundamental concepts of a CRM system its purpose and the pivotal role of an administrator in the Salesforce lifecycle You ll

also explore the basic structures of the entire Salesforce system and navigate confidently through the intricacies of security automation and reporting in the Sales Service Cloud By the end of this book you ll have the confidence you need to navigate Salesforce s backend seamlessly implement configuration changes effortlessly and communicate fluently in Salesforce terminology What you will learn Discover strategies to stay up to date with Salesforce releases Integrate Salesforce products seamlessly to meet diverse business needs Explore Sales and Service Cloud and its transformative impact on sales and customer support operations Master opportunity management for successful deal closures and pipeline forecasting Understand Salesforce Orgs managing users settings and customization Explore data import and export methods and data mapping Discover best practices mock tests and valuable tips and tricks to prepare for Salesforce certification Who this book is for This book is for aspiring Salesforce administrators and consultants looking to build a solid foundation in Salesforce products system setup and customization as well as advance their careers within the Salesforce ecosystem It s also a great resource for those preparing to take the Salesforce ADM 201 certification exam as it serves as an excellent supplement to the existing learning materials

[Salesforce Handbook](#) Wes Nolte,Jeff Douglas,2011-03-01 This book is not intended to be a deep dive on security programming reporting configuration etc but more of a high level overview on salesforce com Force com development tools methodology and other resources We will not cover all aspects of salesforce com We wrote this book to hopefully become an invaluable resource for anyone new or inexperienced with the Force com platform For new administrators and developers coming on to the platform we see a gaping hole in existing reference books This book is not intended for end users or advanced developers This book is for people somewhere in the middle let s say a business analyst or a new Java or NET developer We would like this to be the first book you pick up after your boss walks in and says Let s take a look at salesforce com and see if we can build some applications in the cloud This book contains the information that we wish we had when we started developing applications on Force com

Salesforce B2C Solution Architect's Handbook Mike King,2021-11-19 The ultimate handbook for new and seasoned Salesforce B2C Solution Architects who want to design seamless B2C solutions across the Salesforce Customer 360 ecosystem including B2C Commerce Service Cloud and Marketing Cloud Key Features Give your customers a frictionless experience by creating a unified view of all their interactions Get your architectural design right the first time and avoid costly reworks Prepare for the B2C Solution Architect exam and Salesforce certification with practical scenarios following Salesforce best practices Book DescriptionThere s a huge demand on the market for Salesforce professionals who can create a single view of the customer across the Salesforce Customer 360 platform and leverage data into actionable insights With Salesforce B2C Solution Architect s Handbook you ll gain a deeper understanding of the integration options and products that help you deliver value for organizations While this book will help you prepare for the B2C Solution Architect exam its true value lies in setting you up for success afterwards The first few chapters will help you develop a solid understanding of the capabilities of each component in the Customer 360

ecosystem their data models and governance As you progress you ll explore the role of a B2C solution architect in planning critical requirements and implementation sequences to avoid costly reworks and unnecessary delays You ll learn about the available options for integrating products with the Salesforce ecosystem and demonstrate best practices for data modeling across Salesforce products and beyond Once you ve mastered the core knowledge you ll also learn about tools techniques and certification scenarios in preparation for the B2C Solution Architect exam By the end of this book you ll have the skills to design scalable secure and future proof solutions supporting critical business demands What you will learn Explore key Customer 360 products and their integration options Choose the optimum integration architecture to unify data and experiences Architect a single view of the customer to support service marketing and commerce Plan for critical requirements design decisions and implementation sequences to avoid sub optimal solutions Integrate Customer 360 solutions into a single source of truth solution such as a master data model Support business needs that require functionality from more than one component by orchestrating data and user flows Who this book is for This book is for professionals in high level job roles that heavily rely on Salesforce proficiency It s primarily written for B2C commerce architects application architects integration architects as well as system architects enterprise architects Salesforce architects and CTO teams looking to benefit from a deeper understanding of this platform Before you get started you ll need a solid understanding of data integration APIs and connected systems along with knowledge of the fundamentals of business to consumer B2C customer experiences

Unveiling the Magic of Words: A Report on "**Salesforce Com Customization Handbook Gupta Rakesh**"

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Salesforce Com Customization Handbook Gupta Rakesh Introduction

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