

Salesforce User Guide Spring 1

Jan Vandevelde, Gunther Roskams

Salesforce User Guide Spring 1:

Salesforce Advanced Administrator Certification Guide Enrico Murru, 2019-11-08 Master advanced Salesforce Administration concepts with expert tips techniques and mock tests Key FeaturesLearn advanced features to reduce implementation time and enhance your Salesforce administration skills Develop the ability to solve critical issues with a proactive approach and deliver the best solution Explore complex automation with workflows approvals process builder and custom Apex codingBook Description The Salesforce Advanced Administrator certification extends beyond administrator certification covering advanced platform features and functions such as configuration automation security and customization Complete with comprehensive coverage of all these topics and exam oriented questions and mock tests this Salesforce book will help you earn advanced administrator credentials You ll start your journey by mastering data access security monitoring and auditing and understanding best practices for handling change management and data across organizations The book then delves into data model management for improving data quality and lets you explore Sales features such as products schedules quotes and forecasting capabilities As you progress this book will guide you in working with content management to set up and maintain Salesforce content You ll also master organizing your files and data using reports and dashboards Finally you ll learn how to use a combination of automation tools to solve business problems By the end of the book you will have developed the skills required to get your advanced administrator credentials What you will learnMaster data security to monitor your org effectively Explore best practices for handling change management across orgs Extend the capabilities of Salesforce objects using advanced relationships validation rules and duplicate managementHandle file libraries with Salesforce CRM contentUnderstand ways to deliver the best solutions with Sales and Service Cloud applicationsBuild reports and dashboards to visualize data for better decision makingCustomize your CRM with process automation featuresWho this book is for If you ve already achieved your Salesforce administrator certification this book will help you prepare for the Salesforce Advanced Administrator certification You ll also find this guide useful if you are a Salesforce administrator or developer and want to maximize your administration skills with deeper knowledge of advanced Salesforce declarative features 1 2 years of experience as a Salesforce administrator or developer is enough to help you to get the most out of the Salesforce Process Builder Quick Start Guide Rakesh Gupta, 2018-07-24 Click your way to automating business book 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 Practical Guide to Salesforce Communities Philip Weinmeister, 2018-06-23 Whether you are brand new to the world of Salesforce communities or you are looking to take your Community Cloud knowledge to the next level this detailed guide will help you to build and manage a Salesforce community by leveraging the declarative power of the platform with clicks not code Each Salesforce community is a part of a widespread ecosystem with thousands of communities and millions of users active today on Community Cloud Through valuable social and business tools this online platform enables companies to empower and equip their customers partners and employees in new powerful ways In this book Philip Weinmeister a Salesforce MVP and the first ever recipient of the Community Cloud MVP Trailblazer award leads you through the ins and outs of Salesforce communities and provides you with an array of best practices to deliver top notch business portals on the Salesforce platform Practical Guide to Salesforce Communities is the first book to comprehensively cover this next generation offering from Salesforce providing real actionable guidance to help individuals build effective and engaging online communities The book takes you through the entire process from planning and designing a community to configuration build setup and administration all the way to deployment Detailed explanations are provided of key components templates and features such as Community Builder Audience Targeting Lightning Bolts and much more Additionally considerations and best practices are covered including valuable tips and insights What You ll Learn Plan and design a community Conceptualize how employees partners and customers use and benefit from communities Assess available templates and make an informed selection decision Use Community Builder and Lightning components within a Lightning community template Apply topics andknowledge articles to a community to increase value and adoption Inject process automation into a community using Workflow Flow and Process Builder Create dynamic and personalized user experiences with audience targeting Build export and import unique templates with the Lightning Bolt solution framework Provide community data for members or community managers Who This Book Is For Salesforce administrators Salesforce developers Salesforce functional architects Salesforce business analysts and

Salesforce community managers Salesforce Reporting and Dashboards Johan Yu, 2015-03-26 This book is intended for all Salesforce users administrators managers business analysts or report writers who are new to creating reports or dashboards within Salesforce Basic knowledge of the Salesforce platform is required Learn Salesforce Lightning Felicia Duarte, Rachelle Hoffman, 2017-12-20 Refer to this invaluable how to guide for basic training on Salesforce Lightning Salespeople and technical users and consultants will no longer have to resort to learning the interface on their own which is very time consuming Learn Salesforce Lightning is a step by step visual guide that offers immediate and valuable solutions to the new set of UI tools included in Lightning With chapters broken down into easily absorbed topics you walk through the entire process of managing your daily activities within Salesforce as well as basic customizations and system management The book explains the primary use cases for Lighting and simplifies some of the more complex features such as opportunity stage management and the new dashboard builder Topics covered include Sales and service management Lightning Apps on the AppExchange Lightning dashboards and reports Lightning security LightningProcess Builder and more What You ll Learn Navigate the Salesforce Lightning interface Know where to go in the setup area to make customizations Create dynamic reports and dashboards View Lightning on a mobile device Train other users on common day to day activities within Lightning Who This Book Is for Salespeople managers and executives who are currently evaluating Salesforce com who recently purchased a license with Salesforce com or recently upgraded to the Lightning user interface This book is also for Salesforce administrators consultants project managers and technical users looking for basic training on Salesforce Salesforce Platform Developer I Certification Guide Jan Vandevelde, Gunther Roskams, 2019-05-24 Build Lightning and deploy scalable applications on the Salesforce Lightning Platform using the latest features of Spring 19 Key FeaturesAn end to end guide with practice tests to help you achieve the Salesforce Platform Developer certificationDesign data models user interfaces and business logic for your custom applicationsUnderstand the complete development life cycle from designing to testingBook Description Salesforce Lightning Platform used to build enterprise apps is being increasingly adopted by admins business analysts consultants architects and especially developers With this Salesforce certification you ll be able to enhance your development skills and become a valuable member of your organization. This certification guide is designed to be completely aligned with the official exam study guide for the latest Salesforce Certified Platform Developer I release and includes updates from Spring 19 Starting with Salesforce fundamentals and performing data modeling and management you ll progress to automating logic and processes and working on user interfaces with Salesforce components Finally you ll learn how to work with testing frameworks perform debugging and deploy metadata and get to grips with useful tips and tricks Each chapter concludes with sample questions that are commonly found in the exam and the book wraps up with mock tests to help you prepare for the DEV501 certification exam By the end of the book you ll be ready to take the exam and earn your Salesforce Certified Platform Developer I certification What you will learn Solve sample

questions and mock tests and work with exam patternsGain an understanding of declarative Salesforce tools such as Process Builder flows and many moreCode in Salesforce using the Developer Console and IDEsGrasp the basics of object oriented programmingWrite Apex classes Visualforce pages and Apex test classes with easy to follow stepsExplore the different deployment tools that you can use to push metadata to different environmentsBuild custom declarative apps and programs on Force com platformsWho this book is for The Salesforce Platform Developer I Certification Guide is for you if you want to learn how to develop and deploy business logic and user interfaces using the capabilities of the Lightning Platform No prior knowledge of Apex programming is required Mastering Salesforce DevOps Andrew Davis, 2019-10-29 This practical guide brings DevOps principles to Salesforce development It fits together two major movements within the IT world the movement to Software Platform as a Service SaaS PaaS and the DevOps movement While SaaS and PaaS allow companies to invest in their core competencies rather than maintain their own infrastructure the goal of DevOps is to optimize the process of delivering software innovation and value The release of Salesforce DX in late 2017 unlocks the possibility of a true DevOps workflow on Salesforce But DevOps is new to the Salesforce world and there is not a widespread understanding of its goals and methods and so adoption of Salesforce DX is still in the early stages Mastering Salesforce DevOps explains how to build a powerful and comprehensive DevOps workflow for Salesforce allowing you to finally deploy the world's most innovative platform using the world's most effective and efficient techniques It addresses theneed for a comprehensive guide to DevOps for Salesforce allowing teams to bring proven practices from the IT world to resolve the hardest problems facing Salesforce developers today What You Will Learn Improve company performance and software delivery performance using Salesforce DX Translate DevOps concepts into the unique language and practices of Salesforce Understand why and how you can implement Salesforce DX to achieve greater productivity and innovation Enable continuous delivery on Salesforce Build packages and architect code so it can be deployed easily Allow admins to participate in what has traditionally been a developer workflow Know the techniques for reducing the stress and risk of deployment Apply the full range of automated tests that can be used on Salesforce Who This Book Is for Salesforce developers release managers and those managing Salesforce development teams who need a guide to DevOps and DevOps specialists who need to apply familiar concepts to Salesforce Salesforce AppExchange Success Blueprint Jakub Stefaniak, 2023-10-27 Design develop publish monetize and scale your Salesforce application to become a successful independent software vendor ISV on the AppExchange Key Features Set up a strong foundation and make informed decisions to create innovative solutions Explore the world of the AppExchange development lifecycle Understand essential business strategies to maximize profitability from technical and business standpoints Purchase of the print or Kindle book includes a free PDF eBook Book DescriptionAre you ready to turn your million dollar ideas into reality Salesforce AppExchange Success Blueprint is your ultimate guide to becoming a successful ISV partner and publishing your Salesforce applications on the AppExchange This book covers every facet of the application

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Who This Book Is For IT users getting started with Einstein Analytics Salesforce consultants starting new Einstein Analytics projects and power users familiar with Salesforce reporting and dashboards who want to get up to speed on new analytics Mastering Salesforce Reports and Dashboards David Carnes, 2023-06-14 Effective repeatable and insightful features analytics are key to ROI in customer relationship management systems Many organizations however lack the automated reporting tools they need to run their businesses and instead choose to massage the data in Excel But there s a better way Salesforce's standard reporting tools provide a rich set of features that when combined support a wide variety of analytics needs This practical introduction covers all the aspects and features you need to be successful with Salesforce reports and dashboards Author David Carnes chairman and chief evangelist for OpFocus shows executives end users and report and dashboard superusers what analytics are possible which features report writers should ask to be enabled and which settings and permissions system administrators need to activate You ll learn How to create reports using the four main report formats in Salesforce How to create and use dashboards Methods for storing and finding reports and dashboards How to leverage formulas and trending in Salesforce reporting Special reporting features only available in Salesforce Mobile and on the Analytics tab Ways to embed report charts and dashboards in Lightning page layouts Powerful combinations of reporting features to drive decisions 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 Hands-On Low-Code Application Development with Salesforce Enrico Murru, 2020-10-16 Explore a wide range of low code tools in the Salesforce platform for building customized CRM applications without writing any code Key FeaturesCreate apps with a rich user experience without paying for costly developersLeverage Salesforce Lightning Platform's declarative features to build professional grade applicationsImprove productivity with business process automation using Workflow Process Builder and FlowBook Description Low code platforms allow users to focus on business logic to create solutions without getting trapped in programming complexities Thanks to its powerful features for designing developing and deploying apps without having to hand code Salesforce is at the forefront of the low code development revolution This book will guide you in building creative applications for solving your business problems using the declarative framework provided by Salesforce You ll start by learning how to design your business data model with custom objects fields formulas and validation rules all secured by the Salesforce security model You ll then explore tools such as Workflow Process Builder Lightning Flow and Actions that will help you to automate your business processes with ease This book also shows you how to use Lightning App Builder to build personalized UIs for your Salesforce applications explains the value of creating community pages for your organization and teaches you how to customize them with Experience Builder Finally you ll work with the sandbox model deploy your solutions and deliver an effective release management strategy By the end of this Salesforce book you ll be ready to customize Salesforce CRM to meet your business requirements by creating unique solutions without writing a single line of code What you will learnGet to grips with the fundamentals of data modeling to enhance data qualityDeliver dynamic configuration capabilities using custom settings and metadata typesSecure your data by implementing the Salesforce security modelCustomize Salesforce applications with Lightning App BuilderCreate impressive pages for your community using Experience BuilderUse Data Loader to import and export data without writing any codeEmbrace the Salesforce Ohana culture to share knowledge and learn from the global Salesforce communityWho this book is for If you are a citizen developer business analyst Salesforce administrator or anyone interested in developing applications or solutions for business problems but lack technical knowledge this book is for you No prior programming experience is required **Records and Information Management** Patricia C. Franks, 2013 Benefiting LIS students and professionals alike Franks presents complete coverage of the records and information lifecycle model Encompassing paper electronic databases office suites email and new media records blogs wikis as well as records residing in the cloud software as a service the text addresses a full range of topics including The origins and development of records and information The discipline of information governance Creation capture classification and file plan development Retention strategies Access storage and retrieval Electronic records and electronic records management systems Emerging technologies such as web records social media and mobile devices Vital records disaster preparedness and recovery and business continuity Monitoring auditing and risk management Inactive records management

archives and long term preservation Education and training Developing a strategic records management plan 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 Mastering Salesforce CRM Administration Rakesh Gupta, 2017-03-27

Learn about the Advanced Administration Certification Examination and build a successful career in Salesforce administration About This Book Build your skills and knowledge to crack the Advanced Admin Certification Examination Leverage the advanced administration capabilities of Salesforce and Salesforce 1 Optimize and extend Sales Cloud and Service Cloud applications Who This Book Is For This book is written for Salesforce admins who are looking to gain an in depth knowledge of the Salesforce platform and grow their value in their organization It will teach them to implement and design advanced business process automation for the benefit of their organization What You Will Learn Adopt Lightning Experience to improve the productivity of your organization's sales team Create and maintain service entitlements and entitlement processes Process Builder basic and advanced concepts Different ways to deploy applications between environments Best practices for improving and enriching data quality In Detail The book starts by refreshing your knowledge of common admin tasks You will go over Lightning Experience and various security aspects You will be shown how to implement territory management in your organization and make use of custom objects From here the book progresses to advanced configuration data management and data analytics before swiftly moving on to setting up advanced organization wide features that affect the look and feel of the application Extend the capabilities of your organization's Salesforce implementation by optimizing and extending Sales Cloud Salesforce1 and Service Cloud applications This guide will equip you with the tools you need to build a successful career in Salesforce Style and approach The book takes a straightforward no nonsense approach to working with the Salesforce CRM platform It is filled with examples advanced use cases and all the resources you need to be a Salesforce Jedi Designing Applications with Spring Boot 2.2 and React JS Dinesh Rajput, 2019-09-17 Let us full stack development with Spring Boot and React JS DESCRIPTION Designing Application with Spring Boot 2 React JS is divided into three parts The first part introduces you to the essentials of the Spring Boot 2 2 Framework and you will learn how to create REST APIs and how to secure REST APIs Part 2 steps behind the front end application development with React JS and discuss React features and its advantages toward the front end application development Part 3 expands on that by showing how to deploy backend and frontend application the PaaS platform and also will discuss how to deploy application container technologies such as Docker KEY FEATURES This book has a very specific goal to make developing REST applications easier and focusing on common challenges of the design of the application with best practices This book is providing practical code examples from real world experiences. This book is not only about Spring Boot 2 2 and React JS overview but also has an in depth discussion about adopted REST Architectural pattern and its constraints to create the REST APIs The book can act as a tool for learning Spring Boot 2 2 and React JS for the first time as well as a guide and reference for those wanting to dig deeper into specific features This book is also providing deeper information about the Spring Security and JWT token based authentication for your REST applications This does not only provide information about to design an application using Spring Boot and React JS but also providing how to deploy your

application to the cloud platform PaaS Containerization using Docker is another key feature of this book how to create a Docker image and how to run it WHAT WILL YOU LEARN Exploring Spring Boot 2 2 new features and essential key components such as Starters Autoconfiguration CLI Actuator Develop a REST application using Spring Boot 2 2 and DevTools Exploring Spring Boot Auto Configuration and Customization Creating application profiles based on the environments Learn to configure backend data using JDBC and Spring Data JPA Learn to configure a DataSource for H2 DB and also for Maria DB Learn best practices for designing a REST architecture based application Creating a REST application using HATEOAS Consuming REST APIs endpoints with RestTemplate Traverson and WebClient Exploring JWT web token for the RESTful APIs and explores how to secure REST APIs using OAuth2 and Spring security Creating TESTING module of the Spring Boot application and Unit Integration testing Discuss React JS and its components and also discuss React KS features and its advantages and disadvantage Exploring how to create ReactJS components and how to manage React S component lifecycle Taking a quick overview of consuming the REST API using the React application Deploying the application to the Cloud platform PaaS Containerization and Deploy using Docker containers WHO THIS BOOK IS FOR Designing Application with Spring Boot 2 2 React JS is for all Java developers who want to learn Spring Boot 2 2 and React JS as in the enterprise application Therefore enterprise Java developers will find it particularly useful in the understanding of Spring Boot 2 2 and React JS and how to develop a backend RESTful application using the Spring Boot 2 2 and frontend application using React JS framework They will most fully appreciate the examples presented in this book Before reading this book readers should have basic knowledge of core java spring servlet filter XML and JavaScript TABLE OF CONTENTS Getting Started with Spring Boot 2 2 Customizing Auto Configuration Configuring Data and CRUD operations Creating REST APIs with Spring Boot 2 2 Securing REST APIs Testing Spring Boot Application Getting Started with React Creating and Styling React Components Consuming the REST API with React JS Deploying and Containerizing Application Motor World Wholesale .1922 Learning Salesforce Visual Workflow and Process Builder Rakesh Gupta, 2017-05-18

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learn how to guery 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 Lightening 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 approch to use Process Builder to solve Trailblazer Marc Benioff, Monica Langley, 2019-10-15 NEW YORK complex business requirements with the help of Flow TIMES BESTSELLER The founder and co CEO of Salesforce delivers an inspiring vision for successful companies of the future in which changing the world is everyone s business An urgent and compelling book for anyone in business who yearns to fulfill a higher mission in the world Richard Branson What s the secret to business growth and innovation and a purpose driven career in a world that is becoming vastly more complicated by the day According to Marc Benioff the answer is embracing a culture in which your values permeate everything you do In Trailblazer Benioff gives readers a rare behind the scenes look at the inner workings of one of the world's most admired companies He reveals how Salesforce's core values trust customer success innovation and equality and commitment to giving back have become the company s greatest competitive advantage and the most powerful engine of its success Because no matter what business you re in Benioff says values are the bedrock of a resilient company culture that inspires all employees at every level to do the best work of their lives Along the way he shares insights and best practices for anyone who wants to cultivate a company culture positioned to thrive in the face of the inevitable disruption ahead None of us in the business world can afford to sit on the sidelines and ignore what s going on outside the walls of our workplaces In the future profits and progress will no longer be sustainable unless they serve the greater good Whether you run a company lead a small team or have just draped an ID badge around your neck for the first time Trailblazer reveals how anyone can become an agent of change Praise for Trailblazer A guide for what every business and organization must do to thrive in this period of profound political and economic change Jamie Dimon chairman and CEO of JPMorgan Chase In Trailblazer Benioff explores how companies can nurture a values based culture to become powerful platforms for change Susan Wojcicki CEO of YouTube

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Salesforce User Guide Spring 1 Introduction

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