

Salesforce.com Customization Handbook

Customize Salesforce to automate your business requirements

Salesforce Com Customization Handbook Gupta Rakesh

Scott C. Dulebohn

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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

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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

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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 approachStep by step approch 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 well 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 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 DescriptionDo 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

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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 Salesforce Platform App Builder Certification Handbook Siddhesh Kabe, 2016-04-20 A handy customer experiences guide that covers the most essential topics for Salesforce Platform App Builder Certification in an easy to understand formatAbout This Book Get to grips with the fundamentals of Force com to pass the certification exam with flying colors Create Force com applications automate business processes and manage data operations to be a successful Salesforce com Certified Force com app builder A step by step guide that covers the most essential topics for the Platform App Builder Certification in an easy to understand formatWho This Book Is ForSalesforce beginners who need to prepare for the Salesforce Platform App Builder Certification exam will benefit from this book This book is ideal for developers and admins who are new to Salesforce CRM and the Force complatform It is recommended that users have some basic programming knowledge and are familiar with salesforce By the end of the book you will be ready to appear for the exam and develop various applications on the cloud platform What You Will Learn Learn the basics of the force com cloud platform Learn to build objects that align with your business Understand the process of building an application on force com platform Kick start your certification journey in basic easy to follow guide Focus on important topics that help you accomplish your certification goals Learn to secure your application with the Salesforce security model Manipulate and process large amount of data using the data tools Prepare for the exam with sample mock questions In Detail The Salesforce Certified Platform App Builder exam is for individuals who want to demonstrate their skills and knowledge in designing building and implementing custom applications using the declarative customization capabilities of Force com This book will build a strong foundation in Force com to prepare you for the platform app builder certification exam It will guide you through designing the interface while introducing the Lightning Process Builder Next we will implement business logic using various point and click features of Force com We will learn to manage data and create reports and dashboards We will then learn to administer the force com application by configuring the object level field level and record level security By the end of this book you will be completely equipped to take the Platform App Builder certification exam Style and approachSimple and to the point examples that can be tried out in your developer org A practical book for professionals who want to take the Salesforce Platform App Builder Certification exam Sample questions for every topic in an exam pattern to help you prepare better and tips to get things

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