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Salesforce User Guide Spring 1

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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 and knowledge 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, Rachel 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 Lightning 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 Lightning Process 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 Lightning *Salesforce Platform Developer I Certification Guide* Jan Vandavelde, Gunther Roskams, 2019-05-24 Build and deploy scalable applications on the Salesforce Lightning Platform using the latest features of Spring 19 Key Features An end to end guide with practice tests to help you achieve the Salesforce Platform Developer certification Design data models user interfaces and business logic for your custom applications Understand the complete development life cycle from designing to testing Book 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

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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 the need 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 Description Are 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 development process from the initial

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Conceptual Models and Outcomes of Advancing Knowledge Management: New Technologies Jennex, Murray E., 2012-01-31 This book discusses theory and practice in the design of knowledge management systems facilitation of knowledge sharing and creation of practices that encourage organizational learning Provided by publisher

Getting Started with Salesforce Einstein Analytics Johan Yu, 2019-09-11 Build interactive dashboards using Salesforce Einstein analytics Explore all of your data quickly and easily by providing AI powered advanced analytics right in Salesforce You will manage datasets query data with Salesforce Analytics Query Language SAQL and customize dashboards Because Einstein Analytics is new the curve to learn this technology can be difficult This book guides you step by step in simple easy to understand terms to get data from the Salesforce platform to the Einstein Analytics platform and also shows you how to import external data e g CSV files Core chapters focus on understanding data sources dataflow dataset and lens leading up to building dashboards from scratch Advanced features such as data transformation using computeExpression and computeRelative as well as dataflow with a multi value lookup are explored What You Will Learn Use data from Salesforce and external sources Create a dataflow to build a flexible dataset Build dashboards using Einstein Analytics Explore and analyze data using Einstein Analytics Utilize SAQL and binding to create advance dashboards 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 features Mastering Salesforce Reports and Dashboards David Carnes, 2023-06-14 Effective repeatable and insightful 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 Features Create apps with a rich user experience without paying for costly developers Leverage Salesforce Lightning Platform's declarative features to build professional grade applications Improve productivity with business process automation using Workflow Process Builder and Flow Book 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 learn Get to grips with the fundamentals of data modeling to enhance data quality Deliver dynamic configuration capabilities using custom settings and metadata types Secure your data by implementing the Salesforce security model Customize Salesforce applications with Lightning App Builder Create impressive pages for your community using Experience Builder Use Data Loader to import and export data without writing any code Embrace the Salesforce Ohana culture to share knowledge and learn from the global Salesforce community Who 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, 2013-04-30 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

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Mastering Salesforce CRM Administration Rakesh Gupta,2017-03-27 Learn about the Advanced Administration

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[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

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Trailblazer Marc Benioff, Monica Langley, 2019-10-15 NEW YORK 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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