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Salesforce Essentials for Administrators

Discover the administration fundamentals and challenges of
Salesforce CRM

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Salesforce Essentials for Administrators Mohith Shrivastava,2014-10-10 This book is targeted at expert administrators or professionals who are new to Salesforce and want to learn the various features supported by the platform in a short space of time The book can also be used by professionals preparing for Developer and Administrator certification exams from Salesforce

Learning Salesforce Einstein Mohith Shrivastava,2017-06-28 Incorporate the power of Einstein in your Salesforce application About This Book Make better predictions of your business processes using prediction and predictive modeling Build your own custom models by leveraging PredictionIO on the Heroku platform Integrate Einstein into various cloud services to predict sales marketing leads insights into news feeds and more Who This Book Is For This book is for developers data scientists and Salesforce experienced consultants who want to explore Salesforce Einstein and its current offerings It assumes some prior experience with the Salesforce platform What You Will Learn Get introduced to AI and its role in CRM and cloud applications Understand how Einstein works for the sales service marketing community and commerce clouds Gain a deep understanding of how to use Einstein for the analytics cloud Build predictive apps on Heroku using PredictionIO and work with Einstein Predictive Vision Services Incorporate Einstein in the IoT cloud Test the accuracy of Einstein through Salesforce reporting and Wave analytics In Detail Dreamforce 16 brought forth the latest addition to the Salesforce platform an AI tool named Einstein Einstein promises to provide users of all Salesforce applications with a powerful platform to help them gain deep insights into the data they work on This book will introduce you to Einstein and help you integrate it into your respective business applications based on the Salesforce platform We start off with an introduction to AI then move on to look at how AI can make your CRM and apps smarter Next we discuss various out of the box components added to sales service marketing and community clouds from salesforce to add Artificial Intelligence capabilities Further on we teach you how to use Heroku PredictionIO and the force com platform along with Einstein to build smarter apps The core chapters focus on developer content and introduce PredictionIO and Salesforce Einstein Vision Services We explore Einstein Predictive Vision Services along with analytics cloud the Einstein Data Discovery product and IOT core concepts Throughout the book we also focus on how Einstein can be integrated into CRM and various clouds such as sales services marketing and communities By the end of the book you will be able to embrace and leverage the power of Einstein incorporating its functions to gain more knowledge Salesforce developers will be introduced to the world of AI while data scientists will gain insights into Salesforce s various cloud offerings and how they can use Einstein s capabilities and enhance applications Style and approach This book takes a straightforward approach to explain Salesforce Einstein and all of its potential applications Filled with examples the book presents the facts along with seasoned advice and real world use cases to ensure you have all the resources you need to incorporate the power of Einstein in your work

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

Learning Salesforce Lightning Application Development Mohith Shrivastava, 2018-07-31 Build design and style beautiful and informative applications on the Salesforce Lightning platform Key Features Build and Test Lightning Components that enhance application usability and adaptability Apply Security Best Practices to your Custom Lightning Components Design Lightning Components for Salesforce UIs such as Lightning Pages Salesforce 1 Application Communities and more Book Description Built on the Salesforce App Cloud the new Salesforce Lightning Experience combines three major components Lightning Design System Lightning App Builder and Lightning Components to provide an enhanced user experience This book will enable you to quickly create modern enterprise apps with Lightning Component Framework You will start by building simple Lightning Components and understanding the Lightning Components architecture The chapters cover the basics of Lightning Component Framework semantics and syntax the security features provided by Locker Service and use of third party libraries inside Lightning Components The later chapters focus on debugging performance tuning testing using Lightning Testing Services and how to publish Lightning Components on Salesforce AppExchange What you will learn Understand Lightning Components architecture Learn Locker security best practices Debug and Improve performance of your Lightning Components Use third party libraries along with Lightning Component Framework Learn how to publish Lightning Components on AppExchange Use Lightning Out to take your Lightning Components outside the Salesforce platform Who this book is for This book is for Salesforce developers or developers from other platforms who are familiar with HTML CSS and JavaScript and want to build and test Salesforce Lightning components No knowledge of Salesforce Lightning is required

Salesforce Lightning Platform Enterprise Architecture Andrew Fawcett, 2019-11-04 Key Features Use the Lightning Platform to build integrated scalable and robust apps focused on enterprise level customer demands Use the Lightning Component framework to deliver modern and responsive user experiences targeting multiple devices through Lightning Experience and Salesforce Mobile Extend your application with access to external services and AI Book Description Salesforce Lightning provides a secure and scalable platform to build deploy customize and upgrade applications This book will take you through the architecture of building an application on the Lightning platform to help you understand its features and best practices and ensure that your app keeps up with your customers increasing needs as well as the innovations on the platform This book guides you in working with the popular aPaaS offering from Salesforce the Lightning Platform You ll see how to build and ship enterprise grade apps that not only leverage the platform s many productivity features but also prepare your app to harness its extensibility and customization capabilities You ll even get to grips with advanced application architectural design patterns such as Separation of Concerns Unit Testing and Dependency Integration You will learn to use Apex and JavaScript with Lightning Web Components Platform Events among others with the help of a

sample app illustrating patterns that will ensure your own applications endure and evolve with the platform Finally you will become familiar with using Salesforce DX to develop publish and monitor a sample app and experience standard application life cycle processes along with tools such as Jenkins to implement CI CD By the end of this book you will have learned how to develop effective business apps and be ready to explore innovative ways to meet customer demands What you will learn Create and deploy AppExchange packages and manage upgrades Understand Enterprise Application Architecture patterns Customize mobile and desktop user experience with Lightning Web Components Manage large data volumes with asynchronous processing and big data strategies Implement Source Control and Continuous Integration Add AI to your application with Einstein Use Lightning External Services to integrate external code and data with your Lightning Application Who this book is for This book is for Lightning platform developers who want to discover the true potential of the platform to develop complex scalable applications for use in enterprise businesses **Salesforce Lightning Application**

Development Essentials Mike Topalovich, 2017-08-31 Build design and style beautiful and informative applications on the Salesforce platform About This Book This practical hands on guide will help you to build a multi platform application from scratch Make use of JavaScript HTML and CSS to build custom components Create apps visually using the Lightning component Who This Book Is For This book is for existing Visualforce developers who are looking to gain hands on experience with the new Lightning Experience to build classy Salesforce applications fast A basic knowledge of HTML CSS and JavaScript will help you get through more advanced parts of the book What you will learn Understand the vision for a unified Salesforce experience across all devices Understand the Lightning Component Framework Architecture See how to build Lightning Components Know how to style Lightning Components using the Salesforce Lightning Design System View and edit Salesforce data from Lightning using Apex controllers Build Lightning Pages using Lightning App Builder See the Surface Lightning Components in Lightning Experience Salesforce1 and Salesforce Classic In Detail Built on the Salesforce App Cloud the new Lightning Experience combines the three major components Lightning Design System Lightning App Builder and Lightning Components This book will enable you to quickly and easily create beautiful modern enterprise apps with Lightning We begin by introducing you to the Lightning platform and the three components You ll understand the vision of a unified Salesforce experience across all browsers and devices with Lightning You ll work with standard components and build a basic layout for the application after which you ll learn how to create more advanced custom components using the Lightning Component framework You ll make use of good old JavaScript to perform client side rendering on the DOM Then you ll modify the components to make beautiful UIs for multiple platforms that will fill your app with informative dashboards and make them look professional Finally you ll use the Design System to work with Salesforce data and lay out the entire page application with the components you ve built before testing and debugging your code **Salesforce in Action** Andy White, 2025-09-30 DESCRIPTION Salesforce has become the leading platform for customer relationship management but true

mastery comes from applying its power to real world business needs In this book you will look into its two flagship products Sales Cloud and Service Cloud You will also be exploring the broader Salesforce ecosystem from hidden gems to powerful tools that can transform the way you work The book begins by introducing the Salesforce ecosystem and core concepts then guides you through navigating the interface creating custom objects and managing users with profiles and permission sets Each chapter equips you with everything you need to hit the ground running with Salesforce condensing the author's experience into a book packed with real life examples vivid illustrations and practical tips you can put into action right away Upon completing this guide you will be equipped with the practical skills needed to build and manage solutions confident in your ability to apply Salesforce in any real world scenario

WHAT YOU WILL LEARN Learn Salesforce basics UI and user management best practices Customize UI layouts create objects and manage data relationships Automate business processes using Salesforce Flow and advanced debugging Protect data with the Salesforce security model and role hierarchies Build reports and dashboards and integrate Tableau for visualization Utilize APIs web services and AppExchange for robust integrations Grasp the fundamentals of Apex and Lightning Web Components LWC Prepare effectively for various Salesforce certifications and practice exams

WHO THIS BOOK IS FOR This book is for anyone wanting to start a career in Salesforce It gives hands on examples as well as practical advice to get the most out of Salesforce Salesforce can be used in almost any profession or industry from charities to financial services The examples in this book can easily be adapted to your industry with your newfound knowledge

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[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 Salesforce1 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 **Salesforce Administrator Cert Prep: The Basics** Mike Wheeler,2018

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 Advanced Administrator Certification Guide** Enrico Murru,2019-11-08 Master advanced

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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 For Dummies Liz Kao,Jon Paz,2024-04-02 Your easy to follow guide to the world s leading cloud based CRM software Salesforce gives your business an edge in tracking relationships and managing sales marketing customer service and support operations Salesforce For Dummies help you take advantage of key platform functionality and focus on making the most of its many features Learn best practices to determine the right configuration to suit your business needs and how to use apps build widgets and configure features to personalize your system for your business Explore prospecting for leads managing accounts maintaining contacts tracking products calculating forecasts and monitoring each customer s service and support interactions with your business Collaborate with colleagues by sharing information across a 360 degree view of all customer interactions enhance your online marketing gain real time visibility into sales and close deals faster Get started with configuring Salesforce and set up the apps that your

business needs Discover the latest updates to Salesforce including Flow Builder Lightning and Einstein Improve business performance with reporting insights collaborative communication features and integrated sales and marketing processes Find new ways to improve productivity and reduce administration time Salesforce For Dummies is the fully updated best selling guide that helps new and existing users get up to speed with the world s top CRM **SALESFORCE ADMINISTRATION AND DEVELOPMENT COMPLETE TUTORIAL PART 1** SUJAY. GANGULY,2021 Introduction to Salesforce Administration and Configuration (SPADM-203) Steve Wasula,Stony Point,2013-08-16 This book is designed to accompany the Introduction to Salesforce Administration and Configuration SPADM 203 class offered by Stony Point The book is simply a print out of the slides used in the class with room for a student to take notes A student in the class will learn basic and advanced administration configuration and development skills The book contains valuable real world scenarios discovery questions and exercises that may be useful for anyone preparing to sit for either the Salesforce Certified Administrator or the Force com Certified Developer exam Particularly useful are the 120 sample exam questions now included in the book To get full value out of the material Stony Point highly recommends taking the class instead of simply purchasing the book as a stand alone tool The class itself is delivered by a senior instructor with many years of real world experience as a Salesforce administrator and or a developer This class is specifically designed to prepare students to pass the both the Salesforce Certified Administrator Exam and the Force com Certified Developer exam This book and the class present a broad range of topics cover just about everything on which a student will be tested These topics include but are not limited to security sharing data management customization configuration data validation workflow rules approval processes the Force com architecture and the model view controller design pattern There is in depth coverage of system security topics such as Users Licenses Profiles Field Level Security Permission Sets Record Security Organization Wide Defaults Role Hierarchy Roles Sharing Rules Account Teams Sales Teams Case Teams Queues The object model related to sales force automation marketing automation case management and the community application is thoroughly covered with detailed sections on Accounts Contacts Opportunities Products Price Books Leads Campaigns Cases and Solutions This book includes information and exercises related to all automation features including formula fields workflow rules validation rules escalation rules assignment rules and approval process Finally topics concerning data management integration and analytics will be covered in depth including exercises to reinforce all the major concepts As a participant in the class each student will be given a practice learning environment to use during hands on exercises during the class The student will be able to use this learning environment indefinitely after the class without any additional fee Stony Point is a leading provider of Salesforce training for sales people customer service personnel marketers system administrators developers and consultants Stony Point delivers public and private classes virtually and in person at locations throughout the world Please visit www.stonyp.com for more information on the classes and services offered **Salesforce Administration Essentials for New**

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Salesforce Christopher Matthew Spencer, 2018-05. Increase customers and their satisfaction while growing your business with the world's #1 customer relationship management CRM software. This 6-page laminated guide breaks down options for data and resource transition, data migration, and essential tools and their function. Written by our sales and Salesforce guru and Lynda.com author Christopher Matthew Spencer, this well-rounded primer to this powerful tool will show you the ropes and get you up and running with a proven roadmap to customer satisfaction and success. 6-page laminated guide includes: Intro to Salesforce CRM, Salesforce Clouds, Salesforce CRM Editions, Planning Transition, Data Migration, Initial Setup, Permission Sets, Profiles, Users, Groups, Queues, Roles, Organization-Wide Default Sharing Settings, Data Sharing Overview, Health Check, Tips for Data Importing, Using Salesforce Objects, Apps, Lightning Pages, Page Layouts, Tabs, Files, A Typical Salesforce Team's Workflow, Reports, Dashboards.

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