Salesforce for Beginners

A step-by-step guide to creating, managing, and automating sales and marketing processes



Salesforce Beginners Guide

Sharif Shaalan, Timothy Royer

Salesforce Beginners Guide:

Salesforce for Beginners Sharif Shaalan, 2020-05-29 Get a 360 degree view of the Salesforce platform and learn how to use it for sales service marketing and automating business processes Key FeaturesUnderstand how to use core Salesforce objects for maximum efficiencyBuild various dashboards and reports to analyze results and improve visibility in your business processes Learn the basics of Salesforce administration and mobile app set upBook Description Salesforce is the world s leading Customer Relationship Management CRM software helping businesses connect with their constituents and partners This book will give you a comprehensive introduction to managing sales marketing customer relationships and overall administration for your organization You ll learn how to configure and use Salesforce for maximum efficiency and return on investment You ll start by learning how to create activities manage leads and develop your prospects and sales pipeline using opportunities and accounts and then understand how you can enhance marketing activities using campaigns Packed with real world business use cases this Salesforce book will show you how to analyze your business information accurately to make productive decisions As you advance you ll get to grips with building various reports and dashboards in Salesforce to derive valuable business insights Finally you ll explore tools such as process builder approval processes and assignment rules to achieve business process automation and set out on the path to becoming a successful Salesforce Administrator By the end of the book you ll have learned how to use Salesforce effectively to achieve your business goals What you will learnUnderstand the difference between Salesforce Lightning and Salesforce ClassicCreate and manage leads in SalesforceExplore business development with accounts and contacts in SalesforceFind out how stages and sales processes help you manage your opportunity pipelineAchieve marketing goals using Salesforce campaignsPerform business analysis using reports and dashboardsGain a high level overview of the items in the administration sectionGrasp the different aspects needed to build an effective and flexible Salesforce security modelWho this book is for If you re new to Salesforce and want to learn it from scratch this book is for you No prior knowledge of Salesforce is required to get started with this book Salesforce **Administrator Tutorial for Beginners** Vijay Kumar, 2023-09-11 Salesforce eBook Overview This eBook is completely designed for that student who is interested to learn Salesforce from basic concept of Salesforce Administration Framework implementation with custom project scenarios In this course I have covered complete syllabus of Salesforce Administration Framework from basics to advance with real time scenarios based on live demo projects example in Salesforce This course is designed for developers who want to learn how to use the Salesforce Administration Framework to build custom user interfaces on the Salesforce platform It is suitable for developers who have experience with JavaScript and web development and want to learn how to use the Salesforce Administration Framework to build modern reactive user interfaces that can be easily integrated into Salesforce It is also suitable for experienced Salesforce developers who want to learn how to use the Salesforce Cloud Computing Framework to build more efficient and scalable user interfaces I have taken care of who are

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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

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understanding of this platform Before you get started you should understand the fundamentals of data integration APIs and connected systems in general along with knowledge of the basics of business to consumer B2C customer experiences

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