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Salesforce CRM - The Definitive Admin Handbook - Third Edition



Salesforce CRM – The Definitive Admin Handbook

Third Edition

Successfully administer Salesforce CRM and Salesforce mobile implementations with best practices and real-world scenarios

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[PACKT] enterprise⁸⁸
PUBLISHING professional expertise distilled



Synopsis

Successfully administer Salesforce CRM and Salesforce mobile implementations with best practices and real-world scenarios

About This Book Updated for Winter '15, this book provides the latest best-practice Salesforce administration principles, real-world experience, and critical design considerations for setting up and customizing Salesforce CRM

A pragmatic guide to the key functions for the customization and set up of the application, related to enterprise security, user and data management, process automation, analytics, and mobile features

The features of the Salesforce CRM platform are explored using detailed, step-by-step navigation and descriptions, which offers the reader clear guidance for the customization and administration of the application

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 novice or a more experienced administrator, this book aims to enhance your knowledge and understanding of the Salesforce CRM platform and features.

What You Will Learn

- Configure and control the various organization-wide user interface features in Salesforce CRM
- Set up and maintain a user and administer appropriate security and login access mechanisms
- Apply organization security and understand the capabilities of the Salesforce CRM sharing model
- Create, delete, and customize fields, page layouts, and list views for custom and standard objects
- Implement the mechanisms for data management and discover the tools to import, update, transfer, and mass delete data

In Detail The book begins by guiding you through setting up users and security settings and then progresses to configuration, data management, and data analytics. Next, you will swiftly move on to how to set up organization-wide features that affect the look and feel of the application. Process automation, and approval mechanisms are then covered, along with the functional areas of Sales Cloud, Service Cloud, Marketing Cloud, and Salesforce Chatter. At the end of the book, we cover Salesforce mobile apps and mobile administration, along with techniques to further enhance the system and improve the return on investment.

Prerequisites include Enterprise, Unlimited, Performance, or Developer edition of Salesforce CRM along with the System Administrator permission.

Book Information

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Customer Reviews

I bought this book directly from Packt Publishing during one of their \$5 dollar bonanza deals, along with a handful of other Salesforce related titles from administration topics to apex development. As another reviewer stated, this book is for beginners just learning Salesforce, "It is laid out very well so that you can almost start it and get hooked to this book for hours without feeling any overburden. Sometimes I feel it is a bit over-simplified, but what else would you want when you are starting. I skipped/glanced through a lot of sections since I know most of the areas." It doesn't go too deep into any particular topic, but for a beginner that may be a good thing because the platform is quite overwhelming at first due to breadth of what's available. The book does do a good job giving overviews of the various concepts and topics listed in the index. At first, I felt like this only repeated what the free Salesforce online help docs already provide, and it does do that to a large extent, but where it shines is in the screen shots. Even with 2 years of full time advanced administration under my belt, I thought the screen shots and the author's personal comments/tips were quite valuable -- insight you don't get with the online help docs. That is a plus! One bit of advice I liked was the author's common sense tip in the chapter about creating custom fields. Yes, Salesforce makes it very easy to add custom fields -- a reason we all love the platform -- but it's also easy to fall into the trap of creating lots of fields without considering the consequences. The author provides about 3-4 good paragraphs explaining the pros/cons and what to consider before creating a custom field.

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