Salesforce CRM - The Definitive Admin Handbook - Third Edition

By Paul Goodey

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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.

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Salesforce CRM - The Definitive Admin Handbook - Third Edition By Paul Goodey Bibliography

- Sales Rank: #504352 in Books
- Published on: 2015-01-26
- Released on: 2015-01-30
- Original language: English
- Number of items: 1
- Dimensions: 9.25" h x 1.09" w x 7.50" l, 1.80 pounds
- Binding: Paperback
- 460 pages

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Editorial Review

About the Author

Paul Goodey

Paul Goodey is the author of the book entitled Salesforce CRM Admin Cookbook, Packt Publishing. He has over 20 years' experience developing web technology solutions for companies of all sizes across a variety of industries and has been building solutions with Salesforce CRM since 2006. Paul has enjoyed a variety of roles while working with Salesforce CRM, having worked as a developer, business analyst, solutions architect, and system administrator to provide solutions for both in-house and consultancy-based end users. Based in the UK, near London, his professional qualifications include Salesforce.com Certified Developer DEV-401. He is a keen and active member of Salesforce.com's administrator and developer online communities. He can be found on LinkedIn at http://www.linkedin.com/in/paulgoodey. In his spare time, Paul is an avid runner, having run several marathons and half-marathons.

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