

Salesforce Launcher

Greg Gifford,Jason Hanshaw

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 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

Salesforce CPQ Implementation Handbook Madhu Ramanujan, 2022-04-14 An end-to-end practical guide to implementing Salesforce CPQ solutions, shortening your sales cycle, and generating a higher ROI Key Features Maximize sales by reducing turnaround time and providing a quick analysis of profits and losses Get up to speed with Salesforce CPQ concepts, best practices, and tips when choosing the right CPQ implementation strategy Implement CPQ configurations and automations for B2B and B2C business scenarios Book Description Salesforce CPQ is innovative software that enables you create better quotes, improve quoting accuracy, and maximize sales and deals. It also provides a quick analysis of profits and losses, helping you improve the overall execution of sales processes, and allows a great deal of flexibility for your prospects, customers, and business partners. The book starts with the Quote-2-Cash business process in Salesforce and shows you how to assess when a business needs to implement CPQ. You'll then progress to configuring opportunities, quotes, and CPQ products. As you advance, you'll understand how to define and configure price books, price rules for CPQ quote automation, multidimensional quoting, and more. Next, you'll look at how to configure CPQ guided selling and create package configurations, contracts, and amendments. Later chapters will demonstrate how to perform data migration from a legacy system and the order in which the objects are to be migrated. You'll also explore CPQ billing and its advantages with the help of different use cases before learning about Industries CPQ and how it is different from standard Salesforce CPQ. Finally, you'll discover best practices for achieving optimal CPQ performance and avoiding performance bottlenecks. By the end of this Salesforce book, you'll be able to implement Salesforce CPQ for any business. What you will learn Understand Quote-2-Cash business processes and configure opportunities and quotes Create custom CPQ actions and use custom filters for automating business needs Discover how to configure products and product rules Understand the CPQ pricing structure and methods, rules, multidimensional quoting, and quote automation Explore the CPQ data model and use the Salesforce Schema Builder to view and configure object relationships Configure contracts, amendments, and renewals in Salesforce Focus on CPQ billing and its advantages Gain comprehensive insights into Industries CPQ Who this book is for This book is for Salesforce administrators, business analysts, functional consultants, sales managers, Salesforce architects, and those looking to gain Salesforce CPQ certification. Working knowledge of the Salesforce ecosystem is recommended to get the most out of this book.

Salesforce for Beginners Sharif Shaalan, Timothy Royer, 2022-10-31 Learn how to leverage the Salesforce platform for sales, service, marketing, and automating business activities from a 360-degree perspective. Purchase of the print or Kindle book includes a free eBook in the PDF format. Key Features Automate business processes with Salesforce Flow, the new replacement for workflow rules and process builders on the Salesforce platform Discover key data integrity and security concepts with new, specially dedicated chapters Take your first steps in basic testing and debugging as a Salesforce professional Book Description The second edition of Salesforce for Beginners provides you with a holistic introduction to the Salesforce platform. Whether you need help with the lead generation process, Salesforce user management and data security, or automating tasks with Salesforce Flow, this book is for you. Throughout this new edition you will find real-world business use cases to demonstrate concepts, screenshots of the latest UI displayed for screen navigation, and exercises at the end of every chapter to test your newfound knowledge. Working with the world's leading CRM software, you will learn how to create activities, manage leads, develop your prospects and sales pipeline using opportunities and accounts, and understand how you can enhance marketing activities using campaigns. You will be able to take your administration skills to the next level as you approach real-world user management topics such as ownership skew. You will learn about data security on the Salesforce platform, with an introduction to the role hierarchy, system and user permissions, and much more. In this new edition you'll get to explore the popular automation tool Salesforce Flow. You'll learn about the different flow types to employ, how to construct your first flow, and how to extensively test your flow. This will allow you to come away from reading this book with a real, functional flow for your business processes. What you will learn Explore business development with leads, accounts and contacts in Salesforce Find out

how stages and sales processes help you manage your opportunity pipeline Achieve marketing goals using Salesforce campaigns Perform business analysis using reports and dashboards Practice automating business processes with Salesforce Flow Gain a high-level overview of the items in the administration section Grasp the different aspects needed to build an effective Salesforce security model Who this book is for If you are new to Salesforce and want to learn it from scratch, an administrator looking to build your Salesforce skills, or a student looking to start a career in Salesforce, this book is for you. No prior knowledge of the Salesforce is required to get started with this book

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 For Dummies Liz Kao,Jon Paz,2019-11-05 Get up to lightning speed with this fully updated, bestselling guide to using Salesforce.com! Salesforce.com For Dummies, 7th Edition gives you an edge in building relationships and managing your company's sales, marketing, customer service, and support operations. You'll learn how to maximize the new user interface to organize contacts, schedule business appointments, use forecasting tools to predict upcoming sales, make accurate projects based on past performance, and more. Written by Salesforce.com insiders with years of expertise in CRM services, this new edition covers the latest enhancements to Salesforce.com, the world's most popular customer relationship management software. You'll find out how to determine the right configuration to suit your business needs, and how to use apps, widgets, and tools to personalize your system. Then, you'll explore prospecting leads, managing accounts and partners, developing contacts, tracking products, calculating forecasts, and utilizing service and support. Customize the new user interface with apps, widgets, and tools Prospect leads, drive sales, and provide outstanding customer service Manage contacts, identify opportunities, and analyze your results Collaborate with colleagues using Chatter More than 150,000 companies worldwide use Salesforce.com as their CRM solution—if you're a new or existing user looking to maximize the potential of the new UI, this book has everything you need.

Contemporary Identity and Access Management Architectures: Emerging Research and Opportunities Ng, Alex Chi Keung,2018-01-26 Due to the proliferation of distributed mobile technologies and heavy usage of social media, identity and access management has become a very challenging area. Businesses are facing new demands in implementing solutions, however, there is a lack of information and direction. Contemporary Identity and Access Management Architectures: Emerging Research and Opportunities is a critical scholarly resource that explores management of an organization's identities, credentials, and attributes which assures the identity of a user in an extensible manner set for identity and access administration. Featuring coverage on a broad range of topics, such as biometric application programming interfaces, telecommunication security, and role-based access control, this book is geared towards academicians, practitioners, and researchers seeking current research on identity and access management.

Salesforce.com For Dummies Liz Kao,Jon Paz,2016-04-25 Your all-access guide to reaping the benefits of Salesforce.com Salesforce.com has a rapidly expanding influence over the way companies across the globe interact with their clientele. Written by Salesforce.com insiders with years of experience in customer relationship management (CRM) solutions, *Salesforce.com For Dummies* gives you an edge in building relationships and managing your company's sales, marketing, customer service, and support operations. You'll discover how to organize contacts, schedule business appointments, use forecasting tools to predict upcoming sales, create accurate projects based on past performance, and so much more. A customizable, on-demand CRM solution, Salesforce.com allows businesses to organize and manage all of their customer information—leads, opportunities, contacts, accounts, cases, and solutions—in one place. Whether you're a Windows or Mac user, this down-to-earth, friendly guide shows you how to maximize Salesforce.com's capabilities to close deals faster, gain real-time visibility into sales, and collaborate instantly. Customize the new user interface with apps, widgets, and tools Prospect leads, drive sales, and provide outstanding customer service Manage contacts, identify opportunities, and analyze your results Collaborate with colleagues using Chatter If you're new to Salesforce.com or an existing user looking for the latest tips and tricks to maximize its potential, this friendly guide has you covered.

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 FeaturesCreate apps with a rich user experience without paying for costly developersLeverage Salesforce Lightning Platform's declarative features to build professional-grade applicationsImprove productivity with business process automation using Workflow, Process Builder, and FlowBook 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 learnGet to grips with the fundamentals of data modeling to enhance data qualityDeliver dynamic configuration capabilities using custom settings and metadata typesSecure your data by implementing the Salesforce security modelCustomize Salesforce applications with Lightning App BuilderCreate impressive pages for your community using Experience BuilderUse Data Loader to import and export data without writing any codeEmbrace the Salesforce Ohana culture to share knowledge and learn from the global Salesforce communityWho 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.

Salesforce Platform App Builder Certification Guide Paul Goodey, 2020-11-13 Get up to speed with the essential concepts and techniques necessary to prepare for the Salesforce Platform App Builder certification exam

Key Features Prepare for the Salesforce Platform App Builder certification exam by exploring important concepts and expert tips and techniques

Design the data model, user interface, business logic, and security for custom apps Understand the key milestones and considerations when managing an application lifecycle

Book Description Do you want to be able to confidently design and build apps that support business processes within the Lightning Platform? Salesforce Platform App Builder Certification Guide not only helps you to do this, but also prepares you for the certification exam. The book starts by describing the core capabilities of the Lightning Platform. You'll learn techniques for data modeling to design, build, and deploy apps without writing code and achieve rapid results with the declarative capabilities that the Lightning Platform provides. Next, you'll explore utilities for importing and exporting data and the features available in the Lightning Platform to restrict and extend access to objects, fields, and records. You'll also be able to customize the Salesforce Lightning Experience user interface (UI) and build functionality for custom buttons, links, and actions. Later, this certification study guide will take you through reporting and the social and mobile features of the Lightning Platform. Finally, you'll get to grips with Salesforce build environments and deployment options. By the end of this Salesforce book, you'll not only have learned how to build data models, enforce data security, and implement business logic and process automation, but also have gained the confidence to pass the Platform App Builder exam and achieve Salesforce certification. What you will learn

Explore the core features of the Lightning Platform Design and build an appropriate data model for a given scenario

Identify the Lightning Platform's features and capabilities Customize the Salesforce Lightning Experience UI

Implement business logic and process automation Identify the capabilities of declarative customization

Who this book is for This book is for beginners and aspiring developers who want to learn how to build apps on the Salesforce Platform or pass the Salesforce Platform App Builder certification exam. Salesforce administrators and existing Salesforce Lightning Platform developers looking to learn more about the declarative, non-programmatic app building capabilities of the Salesforce Lightning Platform will also find this book useful.

Salesforce Sales Cloud - An Implementation Handbook Kerry Townsend, 2024-04-30 Design and build Sales Cloud solutions to solve business challenges with this easy-to-follow handbook

Key Features Discover the full range of capabilities offered by Sales Cloud and how to map them to business processes

Learn how to plan and deliver all aspects of a successful Sales Cloud implementation Explore advanced concepts to integrate and extend Sales Cloud

Purchase of the print or Kindle book includes a free PDF eBook **Book Description** Salesforce Sales Cloud is a system rich in functionality, addressing many sales business challenges such as sales productivity, forecast visibility, and sales enablement. However, unlocking the full value of the system and getting maximum returns pose a challenge, especially if you're new to the technology. This implementation handbook goes beyond mere configuration to ensure a successful implementation journey. From laying the groundwork for your project to engaging stakeholders with sales-specific business insights, this book equips you with the knowledge you need to plan and execute. As you progress, you'll learn how to design a robust data model to support the sales and lead generation process, followed by crafting an intuitive user experience to drive productivity. You'll then explore crucial post-building aspects such as testing, training, and releasing functionality. Finally, you'll discover how the solutions' capability can be expanded by adding and integrating other tools to address typical sales use cases. By the end of this book, you'll have grasped how to leverage Sales Cloud to solve sales challenges and have gained the confidence to design and implement solutions successfully with the help of real-world use cases.

What you will learn Find out how Sales Cloud capabilities solve common sales challenges

Determine the best development methodologies Design and build core sales processes, including demand generation and sales productivity

Implement best practices for testing and training with accurate data Build a release plan by understanding the types of post-go-live support

Explore territory management and model additional processes with Sales Cloud Understand common system integration use cases

Harness the power of AppExchange solutions for sales **Who this book is for** This book is for administrators, consultants, and business analysts who want to understand and apply the capabilities of Salesforce Sales Cloud. Whether you're completely new to Sales Cloud or enhancing existing functionalities within your organization, this handbook is your trusted companion. Business stakeholders responsible for or involved in Sales Cloud implementations will also benefit from this book.

Tableau for Salesforce Damiana Spadafora, Lars Malmqvist, 2024-03-29 Connect, analyze, decide: Seamless integration of Tableau and Salesforce

KEY FEATURES ● Successfully connect Tableau with Salesforce CRM. ● Use Tableau and Salesforce to analyze data and create dynamic visualizations. ● Translate analytical findings into tangible business strategies and actions.

DESCRIPTION Tableau is a powerful data visualization tool, and Salesforce CRM is the most successful customer relationship management software. Companies often use these two tools to analyze data and create visualizations. The book starts with an introduction to both Tableau and Salesforce CRM. It then goes on to show how you can connect Tableau with Salesforce CRM and link the two tools. Then, it walks through some of the key features of this connection that allow for seamless data analysis and visualization. It then moves on to advanced use cases, combining Salesforce and Tableau for advanced analytics and decision-making. After reading this book, the reader will have the knowledge to start using both tools to analyze real-world CRM data and create CRM analytical dashboards that generate value for their companies.

WHAT YOU WILL LEARN ● Successfully connect Tableau with Salesforce CRM, and overcome common challenges faced during integration. ● Effectively use Tableau and Salesforce together to analyze data and create dynamic visualizations that are actionable and insightful. ● Combine the power of Salesforce and Tableau to create more complex analyses, aiding in strategic decision-making. ● Design and implement CRM-specific dashboards using Tableau, catering to the unique needs of CRM data analytics. ● Translate analytical findings into tangible business strategies and actions, thereby driving value and growth for your company.

WHO THIS BOOK IS FOR This book is targeted at people who are interested in Tableau and Salesforce. This includes Tableau Desktop users in organizations with Salesforce CRM and Salesforce consultants or administrators.

TABLE OF CONTENTS 1. Introducing Salesforce and Tableau 2. Setting Up Salesforce with Tableau 3. Building and Integrating Data Pipelines 4. Exploring Charts, Graphs, and Dashboards 5. Extracting Deeper Insights with Funnels, Maps, and Hybrid Visualizations 6. Dealing with Complex Visualizations, Customizations, and APIs 7. Integration, Authentication, and Tableau Viz LWC 8. Blending Tableau with Traditional CRM Analytics 9. Exploring Einstein AI and Advanced Analytics 10. Troubleshooting, Tricks, and Best Practices

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.

Learning Salesforce Visual Workflow and Process Builder - Second Edition Rakesh Gupta, 2017-05-18 Click your way to automating various business processes using Salesforce Visual Workflow About This Book* Develop an application using Point and Click with the help of Flow* Get to grips with various ways to launch a Flow* Capture data from an external user without using the Visualforce page* Save user input into the database, and learn how to query and manipulate the data* Discover various ways to debug and deploy Flow and Process Builder* Understand the concepts of Subflow and Login Flow* Handle complex business processes using Process builder and keep them clean* Use existing or new Flows to work with Salesforce Lightning Experience. Who This Book Is For This book is intended for those who want to use Flows to automate their business requirements by clicking, not coding. No previous experience in computer coding or programming is required. What You Will Learn* Develop an application using point and click with the help of Flow* Get to grips with various ways to launch a Flow* Capture data from an external user without using the Visualforce page* Save user input into the database, and learn how to query and manipulate the data* Discover various ways to debug and deploy Flow and Process Builder* Understand the concepts of Subflow and Login Flow* Handle complex business processes using Process builder and keep them clean* Use existing or new Flows to work with Salesforce Lightning Experience. In Detail Salesforce Management System is an information system used in CRM to automate the business processes like sales and marketing. To implement this, Force.com developed a powerful tool called Visual Workflow to automate business processes by creating applications also called Flows. Learning Salesforce Visual Workflow, Second Edition is a practical guide on Flows that will enable you to develop custom applications in Salesforce with minimized code usage. The book starts with an introduction to Visual Workflows that teaches all the building blocks of creating Flows and use it efficiently. You will learn how to easily automate business processes and tackle complex business scenarios using Flows. The book explains the working of the Process Builder so you can create reusable processes. The book also covers how you can integrate existing or newly created Flows with the Salesforce Lightning Experience. By the end of the book, you will get a clear understanding on how to use Flows and Process Builder in your organization to optimize code usage. Style and approach Step by step approach to use Process Builder to solve complex business requirements with the help of Flow

Rapid SaaS Application Development Using Salesforce Tameem Bahri, 2023-12-27 Learn how to rapidly build and document scalable Salesforce applications KEY FEATURES ● Practice the Salesforce rapid application development lifecycle. ● Gain crucial application development skills and knowledge. ● Build a real-world Phonebook application to master the development cycle. DESCRIPTION This book is a practical guide for building secure, scalable, and performant SaaS applications on top of the Salesforce platform. Learn how to dissect a business problem and extract non-communicated requirements. Gain practical knowledge on designing and documenting a Salesforce application using the right mix of low-code development tools such as flows, validation rules, and formula fields and full-code using APEX, Lightning Components, and off-platform modules. Start with the fundamental concepts of the Salesforce platform and its SaaS application development capabilities. Learn key building blocks like objects, fields, and security models, explore powerful tools like App Builder and Flow Builder, and master the principles of the Salesforce app development lifecycle. The book will use real-life business scenarios to practically teach you foundational information and skills that you can use to develop enterprise-ready applications. You will gain critical knowledge and skills to put you on track for your journey toward the prestigious Salesforce Certified Technical Architect credentials. WHAT YOU WILL LEARN ● Develop scalable, extendable, and performant Salesforce applications. ● Build a fully functional Phonebook application and experience the entire development cycle. ● Design and document a Salesforce application efficiently and effectively using standard artifacts. ● Test and release your Salesforce application. ● Build a lively feedback loop with your application's end users. WHO THIS BOOK IS FOR This book is for citizen developers, business analysts, SaaS application developers, Salesforce developers and architects, and anyone interested in developing SaaS applications to solve enterprise business problems or to become Salesforce Certified Technical Architects. TABLE OF CONTENTS 1. Introduction to the Salesforce Platform 2. Deep Dive into Key Building Blocks and Tools 3. Develop a Sample Salesforce Application: PbP Phonebook 4. Learn the Salesforce Application Development Lifecycle 5. Understand the Supporting Tools and Artifacts 6. Create a Sample Application: Define and Refine the Requirements 7. Create a Sample Application: Solve and Build the Application - Part 1 8. Create a Sample Application: Solve and Build the Application - Part 2 9. Create a Sample Application: Test and Deploy 10. Tips and Tricks and the Way Forward

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

Automating Salesforce Marketing Cloud Greg Gifford, Jason Hanshaw, 2022-04-18 Make the most of Salesforce Marketing Cloud through automation and increase your productivity on the platform without adding any extra resources Key Features Increase your knowledge of automation theory and the applications of SFMC Explore automation with SFMC and its capabilities beyond general usage Understand the automation features and integrations of SFMC to use the platform from outside the user interface (UI) for maximum efficiency Book Description Salesforce Marketing Cloud (SFMC) allows you to use multiple channels and tools to create a 1:1 marketing experience for your customers and subscribers. Through automation and helper tasks, you can greatly increase your productivity while also reducing the level of effort required in terms of volume and frequency. Automating Salesforce Marketing Cloud starts by discussing what automation is generally and then progresses to what automation is in SFMC. After that, you'll focus on how to perform automation inside of SFMC all the way to fully running processes and capabilities from an external service. Later chapters explore the benefits and capabilities of automation and having an automation mindset both within and outside of SFMC. Equipped with this knowledge and example code, you'll be prepared to maximize your SFMC efficiency. By the end of this Salesforce book, you'll have the skills you need to build automation both inside and outside of SFMC, along with the knowledge for using the platform optimally. What you will learn Understand automation to make the most of the SFMC platform Optimize ETL activities, data import integrations, data segmentations, email sends, and more Explore different ways to use scripting and API calls to increase Automation Studio efficiency Identify opportunities for automation with custom integrations and third-party solutions Optimize usage of SFMC by building on the core concepts of custom integrations and third-party tools Maximize utilization of employee skills and capabilities and reduce operational costs while increasing output Who this book is for This book is for Salesforce Marketing Cloud users who want to know how to make their day to day lives more efficient and get the most out of the tool by working smarter, not harder. A solid understanding of SFMC and basic knowledge of what automation is will help you get the most out of this book.

Marketing Automation with Mailchimp Margarita J. Caraballo, 2023-05-26 Set up your first channel and effectively expand your

outreach and customer base with Mailchimp to deliver scalable business outcomes Purchase of the print or Kindle book includes a free PDF eBook Key Features Learn audience management strategies to make informed decisions for your marketing channels Employ practical use cases for your custom business needs to implement basic and pro Mailchimp features Customize Mailchimp using powerful integrations to deliver top-notch user experience Book DescriptionAre you looking for an all-in-one comprehensive guide to implementing Mailchimp channels and automation for your business? Then Marketing Automation with Mailchimp can be your go-to guide. You'll start by learning common terms used in the Mailchimp environment, as well as about account setup and audience management for businesses. After that, you'll find out how to set up channels, where you'll actively interact with your contacts and begin to add new ones. Additionally, you'll gain an understanding of how to set up a consistent marketing presence in the form of emails and websites and the benefits of determining a brand identity. You'll also explore advanced Mailchimp features to optimize platform utilization using analytics, reporting, A/B and multivariate testing, the customer journey builder, and the Mailchimp e-commerce store. Toward the end, you'll discover some important shopping, payment, and CRM integrations that can be connected to your Mailchimp platform for custom business needs. With this book, you'll gain insights into real-world use cases to implement a marketing strategy to extend your existing work. By the end of this book, you'll be well-equipped to implement Mailchimp marketing automation seamlessly into your business to grow your customer base and revenue.What you will learn Understand specific account-level settings, their purpose, and account management Explore strategies and tools for managing inactive contacts for target marketing Integrate Mailchimp for easy customization with a low-code options for customization Establish a strong marketing presence with email and websites and leverage it for e-commerce and services Discover advanced reporting and analytics by turning audience information into relevant growth metrics Automate your marketing workflows using the Mailchimp customer journey builder Who this book is for This book is for marketing professionals or small-to-midsize business entrepreneurs looking to start a marketing journey through powerful marketing automation. To get the best from this book, you must be familiar with using web apps and have an understanding of content design. This book will help anyone who is looking to start a marketing career and wants to take hands-on ownership of building marketing and outreach strategies for the business.

Learn Salesforce Lightning Felicia Duarte,Rachelle 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 Lighting, 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.

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