

The book was found

# 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

Paul Goodey

**[PACKT]** enterprise<sup>88</sup>  
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

File Size: 16935 KB

Print Length: 482 pages

Publisher: Packt Publishing; 3rd Revised edition edition (January 30, 2015)

Publication Date: January 30, 2015

Sold by:Â Digital Services LLC

Language: English

ASIN: B00T0C8EQG

Text-to-Speech: Enabled

X-Ray: Not Enabled

Word Wise: Not Enabled

Lending: Not Enabled

Enhanced Typesetting: Enabled

Best Sellers Rank: #262,422 Paid in Kindle Store (See Top 100 Paid in Kindle Store) #32

inÂ Books > Computers & Technology > Networking & Cloud Computing > Network Administration > Email Administration #33 inÂ Books > Computers & Technology > Networking & Cloud Computing > Wireless Networks #109 inÂ Kindle Store > Kindle eBooks > Business & Money > Industries > Customer Relations

## 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.

[Download to continue reading...](#)

Salesforce CRM - The Definitive Admin Handbook - Third Edition Salesforce CRM: The Definitive Admin Handbook - Second Edition Salesforce Leads, Contacts & Accounts for Beginners: The quick and simple way to track your leads, contacts, vendors, customers and partners in Salesforce (Getting Started with Salesforce Book 1) Third Eye: Awakening Your Third Eye Chakra: Beginner's Guide (Third Eye, Third Eye Chakra, Third Eye Awakening, Chakras) Third Eye: Third Eye Activation Secrets (Third Eye Awakening, Pineal Gland, Third Eye Chakra, Open Third Eye) HTML & XHTML: The Definitive Guide: The Definitive Guide (Definitive Guides) The CRM Handbook: A Business Guide to Customer Relationship Management Microsoft Dynamics CRM 2016 Customization - Second Edition MySQL Admin Cookbook LITE: Configuration, Server Monitoring, Managing Users Essentials of Healthcare Compliance (Health Care Admin) Salesforce.com Secrets of Success: Best Practices for Growth and Profitability (2nd Edition) Teach Yourself VISUALLY Salesforce.com Oracle SQL\*Plus: The Definitive Guide (Definitive Guides) 802.11 Wireless Networks: The Definitive Guide: The Definitive Guide The Definitive Guide to GCC (Definitive Guides (Paperback)) Vertical Gardening: The Definitive Guide To Vertical Gardening For Beginners. (The Definitive Gardening Guides) Third Eye Awakening: The Ultimate Guide on How to Open Your Third Eye Chakra to Experience Higher Consciousness and a State of Enlightenment (Third Eye, Pineal Gland, Chakra, Kundalini) The Definitive Guide to ARM® Cortex®-M3 and Cortex®-M4 Processors, Third Edition The Oxygen Revolution, Third Edition: Hyperbaric Oxygen Therapy: The Definitive Treatment of Traumatic Brain Injury (TBI) & Other Disorders The Bipolar Child: The Definitive and Reassuring Guide to Childhood's Most Misunderstood Disorder, Third Edition

[Dmca](#)