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Salesforce Essentials for Administrators

Mohith Shrivastava

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Discover the administration fundamentals and challenges of Salesforce CRM

About This Book

- Learn how various components provided by Salesforce can be used to build and administrator Salesforce CRM and Force.com applications
- Focus on the profiles, roles, workflows, and approval processes with screenshots to provide a visualization of the concepts
- Explore the advanced concepts of management, reporting, and security tools provided by platform with practical insight and illustrations

Who This Book Is For

This book is targeted at expert administrators or professionals who are new to Salesforce and want to learn the various features supported by the platform in a short space of time. The book can also be used by professionals preparing for Developer and Administrator certification exams from Salesforce.

What You Will Learn

- Understand how licensing, profiling, and security settings are set for users
- Perform data modeling and use Salesforce components such as workflows, approvals, validations, layouts, and record types to solve business problems
- Get to know the reporting basics and use Salesforce analytics to build reports and dashboards
- Troubleshoot common challenges that administrators face in real-time businesses
- Get to grips with the Sales Cloud and Service Cloud features provided by the platform
- Utilize tools such as the data loader to load data into Salesforce
- Load data using an external ID and understand the importance of Excel VLOOKUP
- Get familiar with the overall administrator responsibilities for real-time applications

In Detail

Salesforce is one of the leading platforms for developing cloud-based applications. Primarily, Salesforce is designed for managing the sales processes of an organization, but the platform can be leveraged to develop custom applications. It runs on the Force.com platform. With the advantage of having reduced development costs, we can deliver applications in a very short time span. With this book, administrators will learn to tackle a lot of things that pop up in their daily routine.

This book is a comprehensive guide that explains user management, profile management, and the basic building blocks of an application. The book proceeds by explaining the troubleshooting skills needed for an administrator. The best practices and disciplines of data loading are discussed in detail. The book concludes with an overview of sales and service cloud features so that the reader is ready for the advanced configurations of this module. By the end of the book, you will be a competent administrator who can

manage and maintain the Salesforce data of your organization successfully.

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