

Salesforce Com Lightning Process Builder And Visual Workflow A Practical Guide To Model Driven Development On The Force Com Platform

Migrate your data to Salesforce and build low-maintenance and high-performing data integrations to get the most out of Salesforce and make it a "go-to" place for all your organization's customer information. When companies choose to roll out Salesforce, users expect it to be the place to find any and all information related to a customer—the coveted Client 360° view. On the day you go live, users expect to see all their accounts, contacts, and historical data in the system. They also expect that data entered in other systems will be exposed in Salesforce automatically and in a timely manner. This book shows you how to migrate all your legacy data to Salesforce and then design integrations to your organization's mission-critical systems. As the Salesforce platform grows more powerful, it also grows in complexity. Whether you are migrating data to Salesforce, or integrating with Salesforce, it is important to understand how these complexities need to be reflected in your design. Developing Data Migrations and Integrations with Salesforce covers everything you need to know to migrate your data to Salesforce the right way, and how to design low-maintenance, high-performing data integrations with Salesforce. This book is written by a practicing Salesforce integration architect with dozens of Salesforce projects under his belt. The patterns and practices covered in this book are the results of the lessons learned during those projects. What You'll Learn Know how Salesforce's data engine is architected and why Use the Salesforce Data APIs to load and extract data Plan and execute your data migration to Salesforce Design low-maintenance, high-performing data integrations with Salesforce Understand common data integration patterns and the pros and cons of each Know real-time integration options for Salesforce Be aware of common pitfalls Build reusable transformation code covering commonly needed Salesforce transformation patterns Who This Book Is For Those tasked with migrating data to Salesforce or building ongoing data integrations with Salesforce, regardless of the ETL tool or middleware chosen; project sponsors or managers nervous about data tracks putting their projects at risk; aspiring Salesforce integration and/or migration specialists; Salesforce developers or architects looking to expand their skills and take on new challenges

Leverage your Salesforce experience to learn how to design high-performance end-to-end solutions using the Salesforce platform and prepare for the Salesforce Certified Technical Architect Review Board exam with this practical guide. You'll be able to gain not only technical expertise but also the soft skills for communicating your solutions ...

The Salesforce Platform App Builder credential is designed for individuals who would like to demonstrate their skills and knowledge in designing, building, and deploying custom applications using the declarative customization capabilities of the Lightning Platform. The candidate can create, manage, and update data models, application security, business logic, and process automation. Here are some examples of the concepts you should understand to pass the exam: 1: How to design the data model, user interface, business logic, and security for custom applications 2: How to customize applications for mobile use 3: How to design reports and dashboards 4: How to deploy custom applications Preparing for the Salesforce Platform App Builder exam to become a Certified Salesforce App Builder? Here we've brought 100+ Exam Questions for you so that you can prepare well for this exam. Unlike other online simulation practice tests, you get a Paperback version that is easy to read & remember these questions. You can simply rely on these questions for successfully certifying this exam.

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.

Learn everything you need to become a successful data architect on the Salesforce platform Key Features Adopt best practices relating to data governance and learn how to implement them Learn how to work with data in Salesforce while maintaining scalability and security of an instance Gain insights into managing large data volumes in Salesforce Book Description As Salesforce orgs mature over time, data management and integrations are becoming more challenging than ever. Salesforce Data Architecture and Management follows a hands-on approach to managing data and tracking the performance of your Salesforce org. You'll start by understanding the role and skills required to become a successful data architect. The book focuses on data modeling concepts, how to apply them in Salesforce, and how they relate to objects and fields in Salesforce. You'll learn the intricacies of managing data in Salesforce, starting from understanding why Salesforce has chosen to optimize for read rather than write operations. After developing a solid foundation, you'll

explore examples and best practices for managing your data. You'll understand how to manage your master data and discover what the Golden Record is and why it is important for organizations. Next, you'll learn how to align your MDM and CRM strategy with a discussion on Salesforce's Customer 360 and its key components. You'll also cover data governance, its multiple facets, and how GDPR compliance can be achieved with Salesforce. Finally, you'll discover Large Data Volumes (LDVs) and best practices for migrating data using APIs. By the end of this book, you'll be well-versed with data management, data backup, storage, and archiving in Salesforce. What you will learn Understand the Salesforce data architecture Explore various data backup and archival strategies Understand how the Salesforce platform is designed and how it is different from other relational databases Uncover tools that can help in data management that minimize data trust issues in your Salesforce org Focus on the Salesforce Customer 360 platform, its key components, and how it can help organizations in connecting with customers Discover how Salesforce can be used for GDPR compliance Measure and monitor the performance of your Salesforce org Who this book is for This book is for aspiring architects, Salesforce admins, and developers. You will also find the book useful if you're preparing for the Salesforce Data Architecture and Management exam. A basic understanding of Salesforce is assumed.

Learn how to build advanced reports and dashboards in Salesforce Lightning experience About This Book Visualize and create advanced reports and dashboards using Lightning Experience Improve overall business efficiency with advanced and effective reports and dashboards Understand and create custom reports and dashboards Who This Book Is For This book is targeted at Salesforce.com administrators, business analysts, and managers who use Salesforce.com for their daily job and want to learn in depth about Salesforce Reporting and Dashboard in Lightning Experience. Readers should have a basic knowledge of Salesforce, such as: Accounts, Contacts, Leads, Opportunities and custom objects. What You Will Learn Navigate in Salesforce.com within the Lightning Experience user interface Secure and share your reports and dashboards with other users Create, manage, and maintain reports using Report Builder Learn how the report type can affect the report generated Explore the report and dashboard folder and the sharing model Create reports with multiple formats and custom report types Explore various dashboard features in Lightning Experience Use Salesforce1, including accessing reports and dashboards In Detail Built on the Salesforce App Cloud, the new Lightning Experience combines the new Lightning Design System, Lightning App Builder, and Lightning Components to enable anyone to quickly and easily create modern enterprise apps. The book will start with a gentle introduction to the basics of Salesforce reports and dashboards. It will also explain how to access reports in depth. Then you will learn how to create and manage reports, to use Schedule Report, and create advanced report configurations. The next section talks about dashboards and will enable you to understand and compare various types of dashboard component and how you can benefit the most from each of them. Then we move on to advanced topics and explain tips and tricks related to reports and dashboards, including reporting snapshots, report parameters, and collaboration. Finally, we will discuss how to access dashboards and reports from the Salesforce1 mobile app. Style and approach This comprehensive guide covers the advanced features of the all new Salesforce Lightning concepts and communicates them through a practical approach to explore the underlying concepts of how, when, and why to use them.

Architect and deliver packaged Force.com applications that cater to enterprise business needs About This Book Explore the lightning framework, advanced application life cycle processes, and testing Use the Force.com platform to build truly integrated, scalable, and robustly engineered applications focused on enterprise-level customer demands Using the Lightning technology to deliver modern and responsive user experiences targeting multiple devices through Lightning Experience and Salesforce1 Mobile. Step-by-step, work on examples to get you building your own ready-to-install packaged application Who This Book Is For This book is for advanced Force.com developers and architects who need to understand the Salesforce platform from the perspective of enterprise-level requirements. A prior understanding of Apex and Visualforce is a must. Those familiar with other enterprise software ecosystems will also find this book ideal as they adopt Force.com. What You Will Learn Package, install, test, and upgrade an application Define architecture-aligning data storage and functional requirements Develop Apex code that is easy to navigate, self-documenting, testable, robust, and organic Leverage your application's clientagnostic Service layer backbone to support numerous platform areas Get the most from hosting your application within the Lightning Experience and Salesforce1 Mobile clients Apply querying, indexing, and asynchronous best practices Leverage mocking and dependency injection in your Apex tests Explore tips for developing advanced applications In Detail Companies of all sizes have seen the need for Force.com's architectural strategy focused on enabling their business objectives. Successful enterprise applications require planning, commitment, and investment in the best tools, processes, and features available. This book will teach you how to architect and support enduring applications for enterprise clients with Salesforce by exploring how to identify architecture needs and design solutions based on industry standard patterns. There are several ways to build solutions on Force.com, and this book will guide you through a logical path and show you the steps and considerations required to build packaged solutions from start to finish. It covers all aspects, from engineering to getting your application into the hands of your customers, and ensuring that they get the best value possible from your Force.com application. You will get acquainted with extending tools such as Lightning App Builder, Process Builder, and Flow with your own application logic. In addition to building your own application API, you will learn the techniques required to leverage the latest Lightning technologies on desktop and mobile platforms. Style and approach The book takes a straightforward approach, taking apart the Force.com architecture for you to gain a deep understanding of how you can implement the Salesforce platform based on enterprise-level requirements.

Build and deploy scalable applications on the Salesforce Lightning Platform using the latest features of Spring '19 Key Features An end-to-end-guide with practice tests to help you achieve the Salesforce Platform Developer certification Design data models, user interfaces, and business logic for your custom applications Understand the complete

development life cycle from designing to testing Book Description Salesforce Lightning Platform, used to build enterprise apps, is being increasingly adopted by admins, business analysts, consultants, architects, and especially developers. With this Salesforce certification, you'll be able to enhance your development skills and become a valuable member of your organization. This certification guide is designed to be completely aligned with the official exam study guide for the latest Salesforce Certified Platform Developer I release and includes updates from Spring '19. Starting with Salesforce fundamentals and performing data modeling and management, you'll progress to automating logic and processes and working on user interfaces with Salesforce components. Finally, you'll learn how to work with testing frameworks, perform debugging, and deploy metadata, and get to grips with useful tips and tricks. Each chapter concludes with sample questions that are commonly found in the exam, and the book wraps up with mock tests to help you prepare for the DEV501 certification exam. By the end of the book, you'll be ready to take the exam and earn your Salesforce Certified Platform Developer I certification. What you will learn Solve sample questions and mock tests and work with exam patterns Gain an understanding of declarative Salesforce tools such as Process Builder, flows, and many more Code in Salesforce using the Developer Console and IDEs Grasp the basics of object-oriented programming Write Apex classes, Visualforce pages, and Apex test classes with easy-to-follow steps Explore the different deployment tools that you can use to push metadata to different environments Build custom declarative apps and programs on Force.com platforms Who this book is for The Salesforce Platform Developer I Certification Guide is for you if you want to learn how to develop and deploy business logic and user interfaces using the capabilities of the Lightning Platform. No prior knowledge of Apex programming is required.

The practice of enterprise application development has benefited from the emergence of many new enabling technologies. Multi-tiered object-oriented platforms, such as Java and .NET, have become commonplace. These new tools and technologies are capable of building powerful applications, but they are not easily implemented. Common failures in enterprise applications often occur because their developers do not understand the architectural lessons that experienced object developers have learned. Patterns of Enterprise Application Architecture is written in direct response to the stiff challenges that face enterprise application developers. The author, noted object-oriented designer Martin Fowler, noticed that despite changes in technology--from Smalltalk to CORBA to Java to .NET--the same basic design ideas can be adapted and applied to solve common problems. With the help of an expert group of contributors, Martin distills over forty recurring solutions into patterns. The result is an indispensable handbook of solutions that are applicable to any enterprise application platform. This book is actually two books in one. The first section is a short tutorial on developing enterprise applications, which you can read from start to finish to understand the scope of the book's lessons. The next section, the bulk of the book, is a detailed reference to the patterns themselves. Each pattern provides usage and implementation information, as well as detailed code examples in Java or C#. The entire book is also richly illustrated with UML diagrams to further explain the concepts. Armed with this book, you will have the knowledge necessary to make important architectural decisions about building an enterprise application and the proven patterns for use when building them. The topics covered include · Dividing an enterprise application into layers · The major approaches to organizing business logic · An in-depth treatment of mapping between objects and relational databases · Using Model-View-Controller to organize a Web presentation · Handling concurrency for data that spans multiple transactions · Designing distributed object interfaces

In recent years, sales development has emerged as a critical discipline and lever for revenue growth. It has been billed as "the hottest job in sales" and "the most important sales process innovation in 10 years." For all the attention and buzz the SDR role has received, the way companies support sales development in Salesforce hasn't advanced much in a decade. Ask yourself, do your SDRs often remark about how much they love using Salesforce? Do they feel bad for peers at other companies with poorly configured CRMs? Are they thankful that, unlike those poor sods, they aren't drowning in manual steps and byzantine processes? This probably isn't a sentiment you hear very often. The focus of this book is making Salesforce work for your reps. Lightning Sales Ops shares strategies and stories for streamlining process, boosting productivity, and achieving "legendary" status as a button-click admin.

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

"Built on the Salesforce App Cloud, the new Lightning Experience combines the new Lightning Design System, Lightning App Builder, Lightning Process Builder & Lightning Cloud Flow Designer to enable anyone to quickly and easily create modern enterprise apps. This video course entails all out-of-the-box functionality available in Lightning Experience. You will learn how to roll out to Lightning in an existing organization and work with some really amazing point-and-click features to enhance your application's user interface. Lightning App Builder gives you the power to build apps visually, without code, quicker than ever before using custom-built Lightning components. By the end of this course, you'll be able to build efficient apps based on the new Lightning experience and make your Lightning apps available in the Lightning App Builder."--Resource description page.

Salesforce Advanced Administrator Certification Guide is a complete resource that will help you gain the knowledge and master the skills required to earn the advanced administrator credentials. With plenty of questions and answers along with best practices, you will learn all the concepts asked in exams specially designed with this guide.

Learn to harness the power of the Apex language to build Salesforce applications KEY FEATURES - Learn how to work with the Apex language. - Learn how to develop Apex Triggers. - Learn how to use SOQL and SOSL to retrieve data. - Learn how to write Object-Oriented Salesforce code. - Explore the best practices to deliver scalable and maintainable code. DESCRIPTION This book covers the fundamentals of the Salesforce Apex programming language used by developers to build powerful applications in the cloud. In this book, you will learn how to work with the Apex language to build scalable applications that can interact with and update data from your users. We cover the language from the ground up, introducing programming concepts such as variables and control statements alongside clear and concise examples to help you understand the key concepts and features. Platform-specific features such as Apex triggers, SOQL and SOSL are covered in detail to help ensure you deliver robust and scalable solutions. Nuances and best practices for development are discussed along with how to effectively test your code to ensure that you can deploy it to users with confidence. Object-oriented programming in Apex is also covered in-depth to ensure that you can develop dynamic solutions and build for the future. The book also discusses and shows developers how to integrate with third-party solutions using REST APIs in Apex. By the end of the book, the reader will know how to start developing applications using Apex with confidence. WHAT WILL YOU LEARN - Learn how to declare variables in Apex. - Understand how to work with collections in Apex. - Use different control statements within Apex to control program flow. - Learn how to use the built-in tools to test in Apex. - Understand how to make callouts to external applications and data sources. WHO THIS BOOK IS FOR This book is intended for those starting out with Apex, whether existing Salesforce Admins or those joining the Salesforce ecosystem with little professional prior programming experience, such as students. The reader is expected to have some basic familiarity with Salesforce as a platform, although key concepts are reviewed. TABLE OF CONTENTS 0. Introduction 1. An Introduction to the Salesforce Platform 2. What is Apex? 3. Variables in Apex 4. Collections 5. Control Statements 6. Apex Triggers 7. SOQL 8. SOSL 9. Defining Apex Classes 10. Apex Class Inheritance 11. Testing Apex 12. Callouts in Apex 13. Epilogue

Get a 360-degree view of the Salesforce platform and learn how to use it for sales, service, marketing, and automating business processes. Key Features Understand how to use core Salesforce objects for maximum efficiency Build various dashboards and reports to analyze results and improve visibility in your business processes Learn the basics of Salesforce administration and mobile app set up Book Description Salesforce is the world's leading Customer Relationship Management (CRM) software, helping businesses connect with their constituents and partners. This book will give you a comprehensive introduction to managing sales, marketing, customer relationships, and overall administration for your organization. You'll learn how to configure and use Salesforce for maximum efficiency and return on investment. You'll start by learning how to create activities, manage leads, and develop your prospects and sales pipeline using opportunities and accounts, and then understand how you can enhance marketing activities using campaigns. Packed with real-world business use cases, this Salesforce book will show you how to analyze your business information accurately to make productive decisions. As you advance, you'll get to grips with building various reports and dashboards in Salesforce to derive valuable business insights. Finally, you'll explore tools such as process builder, approval processes, and assignment rules to achieve business process automation and set out on the path to becoming a successful Salesforce Administrator. By the end of the book, you'll have learned how to use Salesforce effectively to achieve your business goals. What you will learn Understand the difference between Salesforce Lightning and Salesforce Classic Create and manage leads in Salesforce Explore business development with 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 Gain a high-level overview of the items in the administration section Grasp the different aspects needed to build an effective and flexible Salesforce security model Who this book is for If you're new to Salesforce and want to learn it from scratch, this book is for you. No prior knowledge of Salesforce is required to get started with this book.

Optimize the customer experience via the cloud to gain a powerful competitive advantage Customer Obsessed looks at customer experience through the lens of the cloud to bring you a cutting-edge handbook for customer experience. Cloud technology has been hailed as a game-changer, but a recent IDC report shows that it accounts for less than three percent of total IT spending; why are so many companies neglecting such an enormous asset? This book provides a high-

level overview of how the cloud can give you a competitive advantage. You'll learn how to integrate cloud technology into sound customer experience strategy to achieve unprecedented levels of success. More than just a state-of-the-field assessment, this book offers a set of concrete actions you can take today to leverage cloud computing into technical innovation and better business outcomes at all levels of your organization. You'll examine the many factors that influence the customer experience, and emerge with the insight to fine-tune your approach using the power of the cloud. What kind of advantage is your company leaving on the table? This book guides you through the key drivers of customer success to help you optimize your approach and leverage the future of global technology. Learn the keys to competitive advantage in the digital era Gain insight into each element that affects customer experience Harness the power of the cloud to achieve customer success Follow a prescriptive framework for optimizing customer experience We are in the golden age of IT innovation, but the majority of companies haven't even adopted cloud technology, much less begun to utilize its full business capabilities. Jump into the gap now, and reap the benefits as other struggle to catch up. Customer Obsessed gives you the guidance you need to achieve sustainable success in today's digital world.

Advanced Apex Programming focuses entirely on the Apex language and core design patterns. You'll learn how to truly think in Apex - to embrace limits and bulk patterns. You'll see how to develop architectures for efficient and reliable trigger handling, and for asynchronous operations. You'll discover that best practices differ radically depending on whether you are building software for a specific organization or for a managed package. And you'll find approaches for incorporating testing and diagnostic code that can dramatically improve the reliability and deployment of Apex software, and reduce your lifecycle and support costs. Based on his experience as a consultant, Salesforce MVP, and architect of major AppExchange packages, Dan Appleman focuses on the real-world problems and issues that are faced by Apex developers every day, along with the obscure problems and surprises that can sneak up on you if you are unprepared.

Salesforce CRM: The Definitive Admin Handbook is the complete guide to implementing Salesforce CRM. With this comprehensive guide to implementing Salesforce CRM, administrators of all levels can easily acquire deep knowledge of the platform. This book will show you how to get maximum benefit from this exciting product.

Learning Salesforce Visual Workflow is intended for those who want to use Flows to automate their business requirements by click not code. Salesforce maintains an incredibly user-friendly interface; no previous experience in computer coding or programming is required.

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

Learn how to provide top-grade customer service anywhere, anytime with Salesforce Service Cloud Salesforce Service Cloud empowers your service organization to interact with customers through any channel and provide an individualized experience that will be worth sharing—for your customers and for your company. Salesforce Service Cloud For Dummies is one of the first books to focus specifically on Salesforce Service Cloud software. With it, you'll discover how to set up a sophisticated support center for your business in a matter of a few hours. Whether you're a service executive, manager, support agent, or system administrator, you will discover how to maximize usage of Service Cloud through best practices and step-by-step guidelines. This book will help your customer service departments gain a holistic view of the customers they serve, and provide your customers with meaningful, efficient interactions. Examines how to enable your agents to provide efficient service Discusses how to interact with customers through any channel Offers insights on improving internal communication and collaboration Shows how to resolve customer's questions in a timely manner Take advantage of this opportunity to be heard above your competition with the help of Salesforce Service Cloud For Dummies.

Learn how to build logic into your apps by configuring Salesforce.com Lightning Process Builder and Visual Workflow software tools to meet the needs of your organization without the use of code. You will be able to build workflow diagrams on the Salesforce.com platform and perform complex logic. Individuals who have created workflow diagrams in other applications (e.g., Microsoft Visio) will feel very comfortable using these two tools from Salesforce. If you find yourself in a situation where a standard Salesforce configuration does not meet your needs, you can always rely on a developer to extend the functionality through Visualforce and Apex code. What if you could take back that control and not rely on a developer or consultant? With two new technologies—Process Builder and Visual Workflow—introduced onto the Salesforce.com platform, you can accomplish much of what was normally handled with Apex code. Lightning Process Builder and Visual workflow both allow for advanced logic that standard configuration such as Salesforce.com Workflow cannot do. Salesforce.com Lightning Process Builder and Visual Workflow details how these technologies can be used to: Create a call center application that guides operators through a call with screens that change based on the caller's responses. Automatically submit approvals to speed up and streamline your business. Update related records for any object being modified, including standard and custom objects.

Build interactive dashboards using Salesforce Einstein analytics. Explore all of your data quickly and easily by providing AI-powered advanced analytics, right in Salesforce. You will manage datasets, query data with Salesforce Analytics Query Language (SAQL), and customize dashboards. Because Einstein Analytics is new, the curve to learn this technology can be difficult. This book guides you step-by-step in simple, easy-to-understand terms to get data from the Salesforce platform to the Einstein Analytics platform and also shows you how to import external data (e.g., CSV files). Core chapters focus on understanding data sources, dataflow, dataset, and lens leading up to building dashboards from scratch. Advanced features such as data transformation using computeExpression and computeRelative as well as

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dataflow with a multi-value lookup are explored. What You Will Learn Use data from Salesforce and external sources Create a dataflow to build a flexible dataset Build dashboards using Einstein Analytics Explore and analyze data using Einstein Analytics Utilize SAQL and binding to create advance dashboards Who This Book Is For IT users getting started with Einstein Analytics, Salesforce consultants starting new Einstein Analytics projects, and power users familiar with Salesforce reporting and dashboards who want to get up to speed on new analytics features

Salesforce.com Lightning Process Builder and Visual Workflow A Practical Guide to Model-Driven Development on the Force.com Platform Apress

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.

Hands-On Low-Code Application Development with Salesforce follows the “Clicks, not Code” mantra to develop business applications within the Salesforce environment. This book will help you increase your productivity by understanding the core concepts of metadata-driven development.

"This book is the missing link ... and should be required reading for anyone looking to launch or grow a career within the Salesforce ecosystem." -Selina Suarez, Executive director/founder, PepUp Tech In the next two years, an estimated 3.3 million jobs in the Salesforce ecosystem will open, and one of them could be yours. But how can you sort through all these jobs-administrators, architects, analysts, developers, consultants-and find the one that is right for you? And how do you package yourself to win the job position? Martin Gessner, author of The Salesforce Career Playbook, is known in the Salesforce community for his highly regarded Salesforce credentials training. He has helped thousands of Salesforce professionals learn Salesforce, develop their careers, and prepare for certifications. Now, he has written the definitive guide to starting your Salesforce career, and moving up the ladder. From the Back Cover Packed with case studies and advice from people in the trenches of a Salesforce career, The Salesforce Career Playbook will help you: Find job opportunities and showcase your skills so that you land a job...and not just any old job, but the right job that is best suited to your personality, skills, and lifestyle preferences. Sort through the different careers available, and see a day-in-the-life of real Salesforce professionals working in these jobs. Learn insider tips and strategies for developing and growing your career once you have joined the Salesforce ecosystem. Regardless of whether you have a master's degree in information technology or no formal education beyond eighth grade, you can earn a more-than-competitive wage and move up the ladder in a Salesforce-related career, and jobs are available for techies and not-techies alike. Editorial Reviews "I wish I had read The Salesforce Career Playbook six years ago when I did my transition into the Salesforce ecosystem." -Sergey Erlikh, MVP and solution architect "People don't put in enough time thinking about their careers. You can't just work hard and hope everything works out okay. You have to proactively plan your short- and long-term career, which is why I recommend studying Martin's Salesforce Career Playbook!" -David Liu, Salesforce technical architect, Salesforce MVP "I love the advice from all the people already working in Salesforce, from the nuts and bolts of landing the first job to the high-level advice for finding the right trajectory." -Christine Marshall, MVP and Salesforce administrator "Whether you are a newbie, a career-changer, or advancing in your career, this book will help you find and take the next step." -Ben Duncombe, Director and Salesforce recruitment specialist at Talent Hub, a Salesforce recruitment firm "There's much more to being a successful Salesforce professional than simply accumulating Trailhead badges and Salesforce certifications. This book sheds light on some of the other critical elements (and skills) needed for career success." -David Giller, Salesforce Consultant & Trainer, CEO at Brainiate" This book is about finding your home in Salesforce-and not just any home, but the right home. It's about figuring out who you are as a person and making sure you align your career with what you want out of life." -Anna Loughnan, CRM product lead, community group leader, Salesforce MVP "An excellent read for those navigating their Salesforce careers! Packed with tips for positioning yourself and getting hired." -Stuart Smith, Co-founder and director of SaaSpeople, a Salesforce recruitment firm "This book should be required reading for anyone interested in starting or advancing their career in Salesforce." -Vickie Jeffery, Salesforce MVP, technology manager, Ausure, one of Australia's largest insurance broking companies

Extend and unleash the power of Salesforce CRM and the advanced features of the Lightning interface to create techniques for user interaction and derive real-world solutions. Key Features Implement advanced user interface techniques to improve the look and feel of Salesforce CRM. Discover hidden features and hacks that extend standard configuration to provide enhanced functionality and customization. Build real-world process automation using detailed recipes to harness the full power of Salesforce CRM. Book Description Salesforce CRM is a market-leading customer relationship management (CRM) application that is accessed over the internet. This application greatly enhances a company's sales performance, improves customer satisfaction, and provides a robust customer relationship management system for an organization. Salesforce CRM Admin Cookbook, Second Edition enables you to instantly extend and unleash the power of Salesforce CRM and its Lightning Experience framework. It provides clear, comprehensive instructions along with detailed screenshots and code. Whether you are looking for solutions to enhance the core features, such as data management, process automation, data validation, and home page administration, or are looking for ideas on advanced customization techniques, this book will provide you with immediate, practical, and exciting real-world recipes. This book guides you through interesting topics spanning a variety of functional areas. Recipes are provided that allow you to configure, build and extend the capability of Salesforce CRM using the Lightning Experience framework. What you will learn Building home page components and creating custom links to provide additional functionality and improve the Home Tab layout Improving the look and feel of Salesforce CRM with the presentation of graphical elements using advanced user interface techniques Improving the data quality in Salesforce CRM and automatic data capture Implement an approval process to control the way approvals are managed for records in Salesforce CRM Increase productivity using tools and features to provide advanced administration Extend Lightning Experience Record Pages to tailor user interaction experience Create Lightning component to implement Search before Create for customer/person accounts Who this book is for If you are a system administrator interested in developing and enhancing your skills with data management, process automation and security enhancements with Salesforce CRM, then this book is for you. Some basic understanding of Salesforce CRM and system administration knowledge would be needed.

This book is intended for all Salesforce users—administrators, managers, business analysts, or report writers who are new to creating reports

or dashboards within Salesforce. Basic knowledge of the Salesforce platform is required.

A handy guide that covers the most essential topics for Salesforce Platform App Builder Certification in an easy-to-understand format About This Book Get to grips with the fundamentals of Force.com to pass the certification exam with flying colors Create Force.com applications, automate business processes, and manage data operations to be a successful Salesforce.com Certified Force.com app builder A step-by-step guide that covers the most essential topics for the Platform App Builder Certification in an easy-to-understand format Who This Book Is For Salesforce beginners who need to prepare for the Salesforce Platform App Builder Certification exam will benefit from this book. This book is ideal for developers and admins who are new to Salesforce CRM and the Force.com platform. It is recommended that users have some basic programming knowledge and are familiar with salesforce. By the end of the book, you will be ready to appear for the exam and develop various applications on the cloud platform. What You Will Learn Learn the basics of the force.com cloud platform Learn to build objects that align with your business Understand the process of building an application on force.com platform Kick-start your certification journey in basic- easy-to-follow guide Focus on important topics that help you accomplish your certification goals Learn to secure your application with the Salesforce security model Manipulate and process large amount of data using the data tools Prepare for the exam with sample mock questions In Detail The Salesforce Certified Platform App Builder exam is for individuals who want to demonstrate their skills and knowledge in designing, building, and implementing custom applications using the declarative customization capabilities of Force.com. This book will build a strong foundation in Force.com to prepare you for the platform app builder certification exam. It will guide you through designing the interface while introducing the Lightning Process Builder. Next, we will implement business logic using various point and click features of Force.com. We will learn to manage data and create reports and dashboards. We will then learn to administer the force.com application by configuring the object-level, field-level, and record-level security. By the end of this book, you will be completely equipped to take the Platform App Builder certification exam. Style and approach Simple and to-the-point examples that can be tried out in your developer org. A practical book for professionals who want to take the Salesforce Platform App Builder Certification exam. Sample questions for every topic in an exam pattern to help you prepare better, and tips to get things started. Full of screen-shots, diagrams, and clear step-by-step instructions that cover the entire syllabus for the exam.

The Salesforce Platform App Builder Certification Guide covers the essential topics and fundamental concepts that you need to master in order to design and build applications that support business processes within the Lightning Platform.

A comprehensive guide filled with best practices and tailor-made examples - a must-read for all Lightning Platform architects! 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.

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 Lightning, 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.

Click your way to automating business processes with Salesforce Visual Workflow Key Features Create and maintain complex business processes using Process builder Discover how to debug and deploy Flow and Process Builder Use new or existing Flows to work with Salesforce Lightning Experience Book Description Salesforce Management System is an information system used in CRM to automate business processes, such as sales and marketing. Process Builder is a visual tool created to automate business processes in Salesforce. It enables users with no coding expertise to build complex Salesforce workflows. The book starts with an introduction to Process Builder, focussing on the building blocks of creating Processes. Then you will learn about different applications of Process Builder for developing streamlined solutions. You will learn how to easily automate business processes and tackle complex business scenarios using Processes. The book explains the workings of the Process Builder so that you can create reusable processes. It also explains how you can migrate existing Workflow Rules to Process Builder. By the end of the book, you will have a clear understanding of how to use Flows and Process Builder to optimize code usage. What you will learn Develop an application using point and click with the help of Process Builder Bypass Processes for specific users Understand the concepts of reusable processes Handle complex business processes using Process Builder and keep them clean Work with formulae in Process Builder to minimize the code required Create a process with no criteria so as to minimize the amount of rework Overcome Salesforce's known limitation in terms of referencing picklist values Who this book is for This book is for people who want to use Process Builder to automate their business requirements by clicking, not coding. A basic understanding of Salesforce is required, but not extensive programming knowledge.

Are you facing a challenging Salesforce.com problem--say, relating to automation, configuration, formulation, or reporting--that you can't quite crack? Or maybe you are hoping to infuse some creativity into your solution design strategy to solve problems faster or make solutions more

efficient? Practical Salesforce.com Development Without Code shows you how to unlock the power of the Force.com platform to solve real business problems--and all without writing a line of code. Adhering to Salesforce.com's "clicks, not code" mantra, Salesforce.com expert Phil Weinmeister walks you through different business problems and identifies effective, creative--and proven--approaches to solutions using the platform's declarative framework. If you are a Salesforce.com administrator, analyst, consultant, or developer, you can attest to the insatiable appetite of users for new functionality. Your clients expect solutions--and now. By adopting Practical Salesforce.com Development Without Code as your guide, you will learn how to deliver business solutions within Salesforce.com by combining analysis, creativity, and logic with some of its core elements, including validation rules, workflow rules, and formula fields. In addition, Weinmeister dissects and explains the most useful functions and features for developers, and shows you how to use them. Among other things, you will learn how to: Build objects, fields, and relationships to establish a sensible data model Automate business processes by using workflow rules and flows (Visual Workflow) Utilize functions and develop formulas effectively for a variety of business needs Develop intricate approval processes to handle exception scenarios Employ publisher actions to drive additional functionality from the Chatter feed Manage your data using Data Loader Best of all, Weinmeister uses real-life business scenarios and visuals to keep you engaged and learning something new with every page you read. Practical Salesforce.com Development Without Code will help you absorb the principles behind dozens of creative and thoughtful ways to solve your business problems. Applying the lessons learned from this how-to guide will ultimately save you time and ensure that your clients or internal customers are well satisfied and productive.

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

Use this hands-on guide to build powerful solutions on the Salesforce platform without using a single line of code. This revised and expanded second edition includes Process Builder, Flow Builder, Lightning App Builder, Lightning Bolt Solutions, and more. Practical Salesforce Development Without Code shows you how to unlock the power of the Salesforce platform to solve real business problems. Adhering to Salesforce's "clicks, not code" mantra, Salesforce expert Phil Weinmeister walks Salesforce newcomers and veterans through different business problems and identifies effective—and proven—approaches to solutions using the platform's declarative framework. By adopting this book as your guide, you will learn how to deliver business solutions within Salesforce by combining analysis, creativity, and logic with core elements such as validation rules, workflow rules, processes, flows, formula fields, and Lightning apps. In addition, Weinmeister dissects and explains the most useful functions and features for declarative developers and shows you how to use them. Best of all, Weinmeister uses real-life business scenarios and visuals. Applying the lessons learned from this how-to guide will ultimately save you time and ensure that your clients or internal customers are enabled, equipped, and empowered. What You'll Learn Build objects, fields, and relationships to establish a sensible data model Automate business processes by using Workflow, Process Builder, and Flow Utilize functions and develop formulas effectively for a variety of business needs Develop approval processes to handle exception scenarios Employ actions to easily create efficient and relevant user experiences Manage your environments and deploy your solutions Who This Book Is for Business analysts, Salesforce administrators, and Salesforce developers

Whether you are brand new to the world of Salesforce communities or you are looking to take your Community Cloud knowledge to the next level, this detailed guide will help you to build and manage a Salesforce community by leveraging the declarative power of the platform with clicks, not code. Each Salesforce community is a part of a widespread ecosystem, with thousands of communities and millions of users active today on Community Cloud. Through valuable social and business tools, this online platform enables companies to empower and equip their customers, partners, and employees in new, powerful ways. In this book, Philip Weinmeister, a Salesforce MVP and the first-ever recipient of the "Community Cloud MVP" Trailblazer award, leads you through the ins and outs of Salesforce communities and provides you with an array of best practices to deliver top-notch business portals on the Salesforce platform. Practical Guide to Salesforce Communities is the first book to comprehensively cover this next-generation offering from Salesforce, providing real, actionable guidance to help individuals build effective and engaging online communities. The book takes you through the entire process: from planning and designing a community to configuration/build, setup, and administration, all the way to deployment. Detailed explanations are provided of key components, templates, and features such as Community Builder, Audience Targeting, Lightning Bolts, and much more. Additionally, considerations and best practices are covered, including valuable tips and insights. What You'll Learn Plan and design a community Conceptualize how employees, partners, and customers use and benefit from communities Assess available templates and make an informed selection decision Use Community Builder and Lightning components within a Lightning community template Apply topics and knowledge articles to a community to increase value and adoption Inject process automation into a community using Workflow, Flow, and Process Builder Create dynamic and personalized user experiences with audience targeting Build, export, and import unique templates with the Lightning Bolt solution framework Provide community data for members or community managers Who This Book Is For Salesforce administrators, Salesforce developers, Salesforce functional architects, Salesforce business analysts, and Salesforce community managers

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.

