



Salesforce CRM: The Definitive Admin Handbook - Second Edition

Paul Goodey

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Salesforce CRM is a web-based Customer Relationship Management Service designed to transform your marketing and sales. With this complete guide to implementing the service, administrators of all levels can easily acquire deep knowledge of the platform.

Overview

- Updated for Spring '13, this book covers best practice administration principles, real-world experience, and critical design considerations for setting up and customizing Salesforce CRM
- Analyze data within Salesforce by using reports, dashboards, custom reports, and report builder
- A step-by-step guide offering clear guidance for the customization and administration of the Salesforce CRM application
- Connect users with people and share business information using Salesforce Chatter
- Learn to extend the functionality of the Salesforce CRM application through the use of the platform and technologies such as Visualforce
- Improve the user experience of users in Salesforce CRM by providing additional functionality using external applications from the AppExchange

In Detail

Salesforce CRM: The Definitive Admin Handbook is the complete guide to implementing Salesforce CRM. Whether you are looking to enhance the core features or you have already started customizing your Salesforce CRM system and are looking for guidance on advanced features. This book will show you how to get maximum benefit from this exciting product.

Salesforce CRM is a market-leading customer relationship management (CRM) application that is accessed over the Internet. The CRM application provides facilities to manage sales projections and orders, marketing plans, business process automation and collaboration, service and support, and data analytics. The application greatly enhances a company's sales performance, improves team work and collaboration, and provides a robust customer relationship management strategy for an organization.

Salesforce CRM: The Definitive Admin Handbook has been updated for the Spring '13 release and gives you all the information you need to administer this powerful CRM application.

The book begins with the setup of users and security settings and then progresses to configuration, data management, and data analytics. Finally, the book covers the ways in which the core platform can be further extended and enhanced.

What you will learn from this book

- Implement mechanisms to manage login access and determine company-specific information
- Manage users within Salesforce CRM using features such as granting login access to administrators and enabling delegated user administration

- Configure data structures and user interfaces in Salesforce CRM by using various mechanisms offered by Salesforce CRM
- Control object and profile permissions to access data records by using permission sets, sharing rules, criteria-based sharing, and also manual sharing
- Configure actions for workflow rules and approval processes to automate and streamline the key business process for your organization
- Understand the functional areas within Salesforce CRM for campaigns to customers
- Learn to administer and configure complex Salesforce CRM functionality with ease

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