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The main feature of Salesforce is called an 'Opportunity'; every time someone tries to sell a service to a company, an opportunity is created. Understand that an opportunity is a company but an option to sell something to a company. The not company itself called an 'Accountis ', thus an account gets connected to an opportunity.

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Partner Commerce on Salesforce Spring 2020 User Guide About This Guide With the Partner Commerce on Salesforce User Guide, you can find out how Apttus Partner Commerce works and how partners can quickly select products and checkout on behalf of the end customer, all the time having a seamless experience.

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~~Salesforce~~

Implement your own security policies to protect your Salesforce org. Increase trust by confirming user identity, controlling access to specific apps and data, sharing objects and field data securely, encrypting data, and auditing changes.

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USER PERMISSIONS To create an engagement program: • Pardot Administrator or Marketing role After you segment your audience and finalize the content that drives your program, you're ready to create an engagement program. 1. Open Engagement Studio. • In Pardot, select Marketing and then Engagement Studio.

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Support for many of your organization's Salesforce customizations; 3. User-Focused Help New in this release, salesforce.com broke up the huge 4000+ page "How to be Successful with Salesforce" user guide into 14 new downloadable guides, divided by role, Salesforce product area, and experience level.

~~My top 3 highlights from the Salesforce Spring '13 release ...~~

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This practical guide brings DevOps principles to Salesforce development. It fits together two major movements within the IT world: the movement to Software/Platform as a Service (SaaS/PaaS), and the DevOps movement. While SaaS and PaaS allow companies to invest in their core competencies rather than maintain their own infrastructure, the goal of DevOps is to optimize the process of delivering software innovation and value. The release of Salesforce DX in late 2017 unlocks the possibility of a true DevOps workflow on Salesforce. But DevOps is new to the Salesforce world and there is not a widespread understanding of its goals and methods, and so adoption of Salesforce DX is still in the early stages. Mastering

Salesforce DevOps explains how to build a powerful and comprehensive DevOps workflow for Salesforce—allowing you to finally deploy the world's most innovative platform using the world's most effective and efficient techniques. It addresses the need for a comprehensive guide to DevOps for Salesforce, allowing teams to bring proven practices from the IT world to resolve the hardest problems facing Salesforce developers today. What You Will Learn Improve company performance and software delivery performance using Salesforce DX Translate DevOps concepts into the unique language and practices of Salesforce Understand why and how you can implement Salesforce DX to achieve greater productivity and innovation Enable continuous delivery on Salesforce Build packages and architect code so it can be deployed easily Allow admins to participate in what has traditionally been a developer workflow Know the techniques for reducing the stress and risk of deployment Apply the full range of automated tests that can be used on Salesforce Who This Book Is for Salesforce developers, release managers, and those managing Salesforce development teams who need a guide to DevOps, and DevOps specialists who need to apply familiar concepts to Salesforce

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.

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.

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

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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.

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.

Salesforce Marketing Cloud: Take your digital marketing on a journey! Everything seems to be moving to the cloud these days—and digital marketing is no exception! Salesforce Marketing Cloud For Dummies guides you through the use of Salesforce's exciting suite of cloud-based digital marketing solutions, which have the power to help you plan, personalize,

and optimize your customers' journey. Written by a leader of the Salesforce training and development team, Salesforce Marketing Cloud users will find essential information on using the suite of tools and tips and tricks that only an insider would be able to share. With easy-to-follow instructions, this guide helps you discover how to incorporate your data sets into the tools to create models, campaigns, and customer maps that enable you to create a positive experience for your customers. As Salesforce.com's multi-channel digital marketing platform, the Salesforce Marketing Cloud focuses on helping you manage one-on-one customer journeys. Leveraging a variety of features, this suite of tools offers email marketing, mobile marketing, social media marketing, content and messaging, predictive intelligence, and more. Your ability to navigate these features and functions will determine your digital marketing campaign's success, so it's critical that you make the most of this tool! Navigate and manage the Salesforce Marketing Cloud Define and understand your customers' journeys—and how you fit into them Engage your customers across devices, ensuring consistent communication Use predictive data to optimize engagement Salesforce Marketing Cloud For Dummies helps you make the most of your investment in the digital marketing world!

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.

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.

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