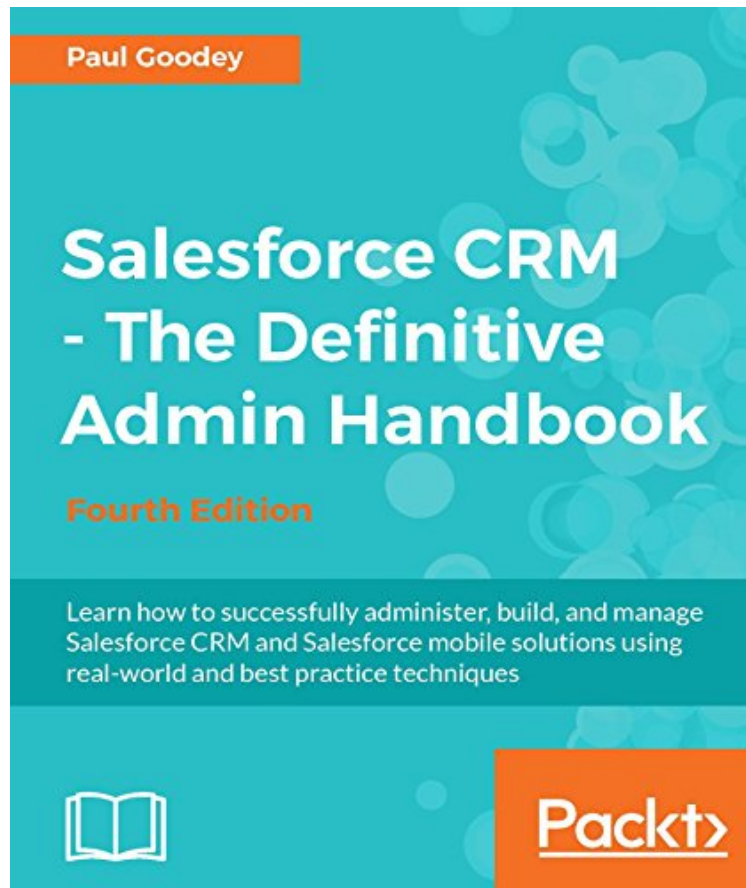


# Salesforce CRM - The Definitive Admin Handbook - Fourth Edition

Paul Goodey

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Learn how to successfully administer, build, and manage Salesforce CRM and Salesforce mobile solutions using real-world and best practice techniquesAbout This BookSee the latest best practice Salesforce administration principles, gain real-world advice, and understand critical design considerations to set up and customize Salesforce CRMThis is a pragmatic guide to the key functions of customizing and setting up the application for enterprise security, user and data management, process automation, analytics, and mobile featuresStep-by-step navigation and descriptions of the features of Salesforce CRM platform and clear guidance on the customization and administration of the applicationIdentify what is covered to create your own improved study guide for the certified administrator examinationWho This Book Is ForThis 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 new administrator or a more experienced professional, this book will enhance your knowledge and understanding of the features of Salesforce

CRM. What You Will Learn  
Manage and administer user records and password policies  
Configure and control the various organization-wide user interface features in Salesforce CRM  
Set up and maintain users, profiles, and permission sets and administer appropriate security and login access mechanisms  
Apply organization security  
Understand the capabilities of the Salesforce CRM sharing model  
Create, delete, and customize fields, page layout, and list views for custom and standard objects  
Find out how Apex and Visualforce coding can be used in Salesforce CRM  
Implement the mechanisms for data management  
Discover the tools to import, update, transfer, and mass delete data  
In Detail  
Salesforce CRM's Winter '17 release offers a host of new features for CRM designed to transform your sales and marketing requirements. With this comprehensive guide to implementing Salesforce CRM, administrators of all levels can easily acquire deep knowledge of the platform. The book begins by guiding you through setting up users and the security settings and then progresses to configuration, data management, and data analytics. We swiftly move on to the setting up of organization wide features that affect the look and feel of the application. Process automation and approval mechanisms are covered next, along with the functional areas of Sales Cloud, Service Cloud, Marketing Cloud, and Salesforce Chatter. This book details Salesforce CRM system administration in a practical way and is an invaluable reference for both new administrators and experienced professionals. At the end of the book, techniques to further enhance the system and improve the return on investment  
Salesforce mobile apps and mobile administration are covered, along with Salesforce Adoption Manager. Every chapter is complete with a section containing example questions of the type that you might encounter in the certification examination.  
Style and approach  
This book takes a straightforward, no-nonsense approach to working with the Salesforce CRM platform. Filled with examples and use cases, the book presents the facts along with seasoned advice and real-world examples to ensure you have all the resources you need to become a more informed Salesforce Administrator.

About the Author  
Paul Goodey is the author of *Salesforce CRM Admin Cookbook*, published by Packt. He has over 25 year's of experience developing web technology solutions for companies of all sizes across a variety of industries and has been building solutions with Salesforce CRM since 2006. Paul has enjoyed a variety of roles while working with Salesforce CRM, having worked as a developer, business analyst, solutions architect, and system administrator to provide solutions for both in-house and consultancy-based end users. Based near London in the UK, his professional qualifications include Salesforce Certified Administrator (ADM-201) and Salesforce Certified Developer (DEV-401). He is a keen and active member of Salesforce's administrator and developer online communities. He can be found on LinkedIn at <http://www.linkedin.com/in/paulgoodey> In his spare time, Paul is an avid runner, having run several marathons and half marathons.