

Salesforce Template Builder

Damiana Spadafora,Lars Malmqvist

Hands-On Salesforce Data Cloud Joyce Kay Avila,2024-08-09 Learn how to implement and manage a modern customer data platform (CDP) through the Salesforce Data Cloud platform. This practical book provides a comprehensive overview that shows architects, administrators, developers, data engineers, and marketers how to ingest, store, and manage real-time customer data. Author Joyce Kay Avila demonstrates how to use Salesforce's native connectors, canonical data model, and Einstein's built-in trust layer to accelerate your time to value. You'll learn how to leverage Salesforce's low-code/no-code functionality to expertly build a Data Cloud foundation that unlocks the power of structured and unstructured data. Use Data Cloud tools to build your own predictive models or leverage third-party machine learning platforms like Amazon SageMaker, Google Vertex AI, and Databricks. This book will help you: Develop a plan to execute a CDP project effectively and efficiently Connect Data Cloud to external data sources and build out a Customer 360 Data Model Leverage data sharing capabilities with Snowflake, BigQuery, Databricks, and Azure Use Salesforce Data Cloud capabilities for identity resolution and segmentation Create calculated, streaming, visualization, and predictive insights Use Data Graphs to power Salesforce Einstein capabilities Learn Data Cloud best practices for all phases of the development lifecycle

Programming Salesforce Marketing Cloud ZHONGCHEN ZHOU,2019-04-03 This book introduces concepts to integrate with marketing cloud using API and build custom components in a platform agnostic way, including the following aspects: Marketing Cloud Package Custom Journey Builder Activity API Integration (Server to Server & Web App) Custom Marketing Cloud App Server Side JavaScript These concepts will be applicable to any programming language and platform. After introducing the concepts, we will implement these concepts using APEX programming language within Salesforce sales cloud. Tips, patterns and special considerations will be introduced when using APEX in sales cloud to implement these concepts, for example: how to serve custom activity configuration file; how to expose less REST service and write less APEX class and at the same time achieve right level of encapsulation; how to decode JWT passing from marketing cloud Journey Builder; how to build user interface and allow marketing cloud users without sales cloud account to access; how to display visualforce page inside marketing cloud iframes how to set up the right architecture.

Tableau for Salesforce Damiana Spadafora,Lars Malmqvist,2024-03-29 Connect, analyze, decide: Seamless integration of Tableau and Salesforce KEY FEATURES ● Successfully connect Tableau with Salesforce CRM. ● Use Tableau and

Salesforce to analyze data and create dynamic visualizations. ● Translate analytical findings into tangible business strategies and actions. DESCRIPTION Tableau is a powerful data visualization tool, and Salesforce CRM is the most successful customer relationship management software. Companies often use these two tools to analyze data and create visualizations. The book starts with an introduction to both Tableau and Salesforce CRM. It then goes on to show how you can connect Tableau with Salesforce CRM and link the two tools. Then, it walks through some of the key features of this connection that allow for seamless data analysis and visualization. It then moves on to advanced use cases, combining Salesforce and Tableau for advanced analytics and decision-making. After reading this book, the reader will have the knowledge to start using both tools to analyze real-world CRM data and create CRM analytical dashboards that generate value for their companies. WHAT YOU WILL LEARN ● Successfully connect Tableau with Salesforce CRM, and overcome common challenges faced during integration. ● Effectively use Tableau and Salesforce together to analyze data and create dynamic visualizations that are actionable and insightful. ● Combine the power of Salesforce and Tableau to create more complex analyses, aiding in strategic decision-making. ● Design and implement CRM-specific dashboards using Tableau, catering to the unique needs of CRM data analytics. ● Translate analytical findings into tangible business strategies and actions, thereby driving value and growth for your company. WHO THIS BOOK IS FOR This book is targeted at people who are interested in Tableau and Salesforce. This includes Tableau Desktop users in organizations with Salesforce CRM and Salesforce consultants or administrators. TABLE OF CONTENTS 1. Introducing Salesforce and Tableau 2. Setting Up Salesforce with Tableau 3. Building and Integrating Data Pipelines 4. Exploring Charts, Graphs, and Dashboards 5. Extracting Deeper Insights with Funnels, Maps, and Hybrid Visualizations 6. Dealing with Complex Visualizations, Customizations, and APIs 7. Integration, Authentication, and Tableau Viz LWC 8. Blending Tableau with Traditional CRM Analytics 9. Exploring Einstein AI and Advanced Analytics 10. Troubleshooting, Tricks, and Best Practices

Salesforce Marketing Cloud For Dummies Chester Bullock, Mark Pollard, 2017-10-30 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!

Salesforce.com Lightning Process Builder and Visual Workflow Jonathan Keel,2016-11-25 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.

Salesforce Automation with Salesforce Flow and Apex Om Prakash,2024-11-26 DESCRIPTION Introducing Salesforce Automation with Salesforce Flow and Apex, a practical guide designed for anyone wanting to learn Salesforce automation. Whether you are just starting out or looking to build on your existing skills, this book is here to help you navigate the world of Salesforce flow and automation techniques. This book provides a comprehensive guide to Salesforce flow, a powerful automation tool within the Salesforce platform. It covers foundational concepts like flow types, elements, and debugging techniques. The book explains advanced topics such as screen flows, record-triggered flows, schedule-triggered flows, and platform event-triggered flows. It also explores the integration of flows with Apex to enhance functionality. Additionally, the book covers best practices for performance optimization, error handling, and security. It provides guidance on migrating from traditional automation tools like workflow rule and process builder to flow. By the end of this book, you will be ready to make a real impact with your Salesforce skills, driving efficiency and innovation in your organization. KEY FEATURES ● A comprehensive introduction to Salesforce flow and automation with Apex and its benefits. ● Practical guidance on creating and configuring user-friendly interfaces with screen flows. ● Best practices for optimizing flow

performance, handling errors, and ensuring security. **WHAT YOU WILL LEARN** ● Grasp the importance of Salesforce automation and its transformative impact on business efficiency. ● Explore Salesforce flow features and learn to create, debug, and optimize various flows, including screen and record-triggered flows. ● Master autolaunched flows, integrate them with Apex, and enhance automation using platform events and scheduled flows. ● Implement secure flow sharing, migrate from legacy automation tools, and integrate flows with external systems for seamless data exchange. ● Combine flows and Apex triggers to build advanced, real-time automation solutions tailored to business needs. **WHO THIS BOOK IS FOR** This book is intended for Salesforce professionals, beginners, and students eager to learn automation within the Salesforce ecosystem. It is ideal for those pursuing roles such as Salesforce administrators, developers, business analysts, testers/QA, consultants, and architects. **TABLE OF CONTENTS** 1. Necessity of Salesforce Automation 2. Introducing Salesforce flow's Features and Capabilities 3. Up and Running with Salesforce flow 4. Salesforce flow Implementation and Debugging 5. Creating Screen flows 6. Implementing Screen flows 7. Implementing Record-triggered flows 8. Scheduling Triggered flows 9. Platform event-triggered flow 10. Autolaunched flows 11. Record-triggered Orchestration 12. Apex Actions and Lightning Web Components 13. Best Practices and Troubleshooting Measures 14. Distributing and Sharing flows 15. Integrating flow Outside Salesforce 16. Migrating to flow from Workflow and Process Builder 17. Hands-on Apex Triggers for Automation

Rapid SaaS Application Development Using Salesforce Tameem Bahri, 2023-12-27 Learn how to rapidly build and document scalable Salesforce applications **KEY FEATURES** ● Practice the Salesforce rapid application development lifecycle. ● Gain crucial application development skills and knowledge. ● Build a real-world Phonebook application to master the development cycle. **DESCRIPTION** This book is a practical guide for building secure, scalable, and performant SaaS applications on top of the Salesforce platform. Learn how to dissect a business problem and extract non-communicated requirements. Gain practical knowledge on designing and documenting a Salesforce application using the right mix of low-code development tools such as flows, validation rules, and formula fields and full-code using APEX, Lightning Components, and off-platform modules. Start with the fundamental concepts of the Salesforce platform and its SaaS application development capabilities. Learn key building blocks like objects, fields, and security models, explore powerful tools like App Builder and Flow Builder, and master the principles of the Salesforce app development lifecycle. The book will use real-life business scenarios to practically teach you foundational information and skills that you can use to develop enterprise-ready applications. You will gain critical knowledge and skills to put you on track for your journey toward the prestigious Salesforce Certified Technical Architect credentials. **WHAT YOU WILL LEARN** ● Develop scalable, extendable, and performant Salesforce applications. ● Build a fully functional Phonebook application and experience the entire development cycle. ● Design and document a Salesforce application efficiently and effectively using standard artifacts. ● Test and release your

Salesforce application. ● Build a lively feedback loop with your application's end users. WHO THIS BOOK IS FOR This book is for citizen developers, business analysts, SaaS application developers, salesforce developers and architects, and anyone interested in developing SaaS applications to solve enterprise business problems or to become Salesforce Certified Technical Architects. TABLE OF CONTENTS 1. Introduction to the Salesforce Platform 2. Deep Dive into Key Building Blocks and Tools 3. Develop a Sample Salesforce Application: PbP Phonebook 4. Learn the Salesforce Application Development Lifecycle 5. Understand the Supporting Tools and Artifacts 6. Create a Sample Application: Define and Refine the Requirements 7. Create a Sample Application: Solve and Build the Application - Part 1 8. Create a Sample Application: Solve and Build the Application - Part 2 9. Create a Sample Application: Test and Deploy 10. Tips and Tricks and the Way Forward

Mastering Salesforce Flow for Enterprises James A Hutcherson, 2025-01-30 DESCRIPTION This book gives you the knowledge to create real-world automation using Salesforce Flows. It starts with a detailed review of business process automation and the fundamentals used to discover, model, analyze, and optimize business processes. You will learn how each step of the process aligns with the information required to create efficient and effective Salesforce Flows. You will then examine how core features included within Salesforce are used to establish and enhance business processes across your instance and applications. You will see how Salesforce features were developed to help improve the collection of data, automate business processes, and enhance outcomes from the start. You will learn the best practices and frameworks used to improve how your business functions continually. With step-by-step instructions, you will learn how to create, test, debug, and improve Salesforce Flows using Flow Builder for several types of flows, including Screen, Record-triggered, and Screenless flow. You will examine how to design subflows that can reduce redundancy within your Salesforce instance. You will also learn when and how to use each flow type in an optimal way. You will examine how the use of advanced features such as AI for Flow, Flow Trigger Explorer, Flow Orchestrator, and Transform features improve your business automation outcomes. KEY FEATURES ● Learn how BPM simplifies creating flows and why hyper-automation and composability are crucial for businesses. ● Work with Screen, Screenless, and Triggered flows while troubleshooting and fixing errors effectively. ● Understand how AI improves automation and creates smarter workflows. WHAT YOU WILL LEARN ● Learn to use Salesforce Flows to automate complex business processes. ● Understand the different types of flows and when to use them. ● Improve usability, scalability, and security for your applications with flows. ● Identify and use best practices when creating new process automation. ● Understand BPM fundamentals and how to use them to create better flows. WHO THIS BOOK IS FOR This book is for administrators, developers, business analysts, and architects who want to learn and master Salesforce Flows. It is ideal for those looking to automate complex business processes, improve efficiency, and integrate AI capabilities within their environment. TABLE OF CONTENTS 1. Setting the Stage for Flows 2. Business Process Management Fundamentals with Salesforce Flows 3. Extracting Business Processes for Automation 4. Process Automation in Salesforce 5.

Using Core Salesforce Features in Automation 6. Introduction to Salesforce Flows 7. Flow Builder Fundamentals 8. Understanding Flow Builder Elements, Connectors, and Resources 9. Mastering Screen Flows 10. Record-triggered Flows 11. Screenless Flows 12. Building Effective Subflows 13. Flow Trigger Explorer, Orchestrator, and Transform 14. Optimizing and Testing Flows 15. Using AI in Flows

Mastering Salesforce Experience Cloud Lillie Beiting, Rachel Rogers, 2024-10-04 Your guide to unlocking business potential and technical mastery with essential to advanced strategies for launching and maintaining top-tier Experience Cloud sites effortlessly Key Features Empower your team and your organization to lead and maintain an Experience Cloud transformation Master out-of-the-box Experience Cloud features, custom development options, and development best practices Curate a consumer-friendly Experience Cloud site that maximizes value for your company, while keeping maintenance costs low Purchase of the print or Kindle book includes a free PDF eBook Book Description Empowering your target audience to interact effortlessly with you and your product offerings is a critical aspect of business in the modern era. Users expect easy, professional digital experiences when engaging with organizations. However, creating engagement applications from scratch is challenging, and connecting user behavior with your organization's data is even more complex. Enter Salesforce Experience Cloud sites, website portals built on the Salesforce data model that seamlessly connects your user data to your user experience. Mastering Salesforce Experience Cloud focuses on the human-centric nature of this product, beginning with a comprehensive guide on designing for your organization's desired users and ensuring success for both internal teams and end users. After exploring the real-world applications of Experience Cloud and reviewing license models, this book provides a beginning-to-end guide to mastering the technical backend of this product, covering both out-of-the-box settings and customization techniques. By the end of this book, you'll have gained a deep understanding of the Experience Cloud data model and customization options to create engaging, user-centric digital experiences that deliver value to your organization and stakeholders. What you will learn Define your audience and identify your overall strategy for an Experience Cloud site Understand the technical and operational strategy needed to support your site Work with the Experience Cloud data model and standard template features Determine when to use Visualforce, Aura, LWC, or LWR while exploring custom development options Get to grips with the how Salesforce Flow and Triggers work Leverage marketing automation, knowledge base, and communication in the site Find out about site launch tactics, user creation, site moderation, and ongoing reporting Who this book is for If you want to understand the intricacies of Salesforce Experience Cloud, transform your client experience, enhance your enterprise architecture, and create a scalable, world class-customer web experience that smoothly integrates with an existing Salesforce instance, this book is for you. Business leaders, IT leaders, Salesforce developers, Salesforce admins, and web teams tasked with delivering and maintaining an excellent, integrated Experience Cloud portal will benefit from this book. Ideal for readers with Salesforce experience in any cloud or a

basic grasp of Service Cloud features.

Learning Salesforce Einstein Mohith Shrivastava, 2017-06-28 Incorporate the power of Einstein in your Salesforce application About This Book Make better predictions of your business processes using prediction and predictive modeling Build your own custom models by leveraging PredictionIO on the Heroku platform Integrate Einstein into various cloud services to predict sales, marketing leads, insights into news feeds, and more Who This Book Is For This book is for developers, data scientists, and Salesforce-experienced consultants who want to explore Salesforce Einstein and its current offerings. It assumes some prior experience with the Salesforce platform. What You Will Learn Get introduced to AI and its role in CRM and cloud applications Understand how Einstein works for the sales, service, marketing, community, and commerce clouds Gain a deep understanding of how to use Einstein for the analytics cloud Build predictive apps on Heroku using PredictionIO, and work with Einstein Predictive Vision Services Incorporate Einstein in the IoT cloud Test the accuracy of Einstein through Salesforce reporting and Wave analytics In Detail Dreamforce 16 brought forth the latest addition to the Salesforce platform: an AI tool named Einstein. Einstein promises to provide users of all Salesforce applications with a powerful platform to help them gain deep insights into the data they work on. This book will introduce you to Einstein and help you integrate it into your respective business applications based on the Salesforce platform. We start off with an introduction to AI, then move on to look at how AI can make your CRM and apps smarter. Next, we discuss various out-of-the-box components added to sales, service, marketing, and community clouds from salesforce to add Artificial Intelligence capabilities. Further on, we teach you how to use Heroku, PredictionIO, and the force.com platform, along with Einstein, to build smarter apps. The core chapters focus on developer content and introduce PredictionIO and Salesforce Einstein Vision Services. We explore Einstein Predictive Vision Services, along with analytics cloud, the Einstein Data Discovery product, and IOT core concepts. Throughout the book, we also focus on how Einstein can be integrated into CRM and various clouds such as sales, services, marketing, and communities. By the end of the book, you will be able to embrace and leverage the power of Einstein, incorporating its functions to gain more knowledge. Salesforce developers will be introduced to the world of AI, while data scientists will gain insights into Salesforce's various cloud offerings and how they can use Einstein's capabilities and enhance applications. Style and approach This book takes a straightforward approach to explain Salesforce Einstein and all of its potential applications. Filled with examples, the book presents the facts along with seasoned advice and real-world use cases to ensure you have all the resources you need to incorporate the power of Einstein in your work.

Hands-On Low-Code Application Development with Salesforce Enrico Murru, 2020-10-16 Explore a wide range of low-code tools in the Salesforce platform for building customized CRM applications without writing any code Key Features Create apps with a rich user experience without paying for costly developers Leverage Salesforce Lightning Platform's declarative features to build professional-grade applications Improve productivity with business process automation using Workflow,

Process Builder, and FlowBook Description Low-code platforms allow users to focus on business logic to create solutions without getting trapped in programming complexities. Thanks to its powerful features for designing, developing, and deploying apps without having to hand-code, Salesforce is at the forefront of the low-code development revolution. This book will guide you in building creative applications for solving your business problems using the declarative framework provided by Salesforce. You'll start by learning how to design your business data model with custom objects, fields, formulas, and validation rules, all secured by the Salesforce security model. You'll then explore tools such as Workflow, Process Builder, Lightning Flow, and Actions that will help you to automate your business processes with ease. This book also shows you how to use Lightning App Builder to build personalized UIs for your Salesforce applications, explains the value of creating community pages for your organization, and teaches you how to customize them with Experience Builder. Finally, you'll work with the sandbox model, deploy your solutions, and deliver an effective release management strategy. By the end of this Salesforce book, you'll be ready to customize Salesforce CRM to meet your business requirements by creating unique solutions without writing a single line of code. What you will learnGet to grips with the fundamentals of data modeling to enhance data qualityDeliver dynamic configuration capabilities using custom settings and metadata typesSecure your data by implementing the Salesforce security modelCustomize Salesforce applications with Lightning App BuilderCreate impressive pages for your community using Experience BuilderUse Data Loader to import and export data without writing any codeEmbrace the Salesforce Ohana culture to share knowledge and learn from the global Salesforce communityWho this book is for If you are a citizen developer, business analyst, Salesforce administrator, or anyone interested in developing applications or solutions for business problems but lack technical knowledge, this book is for you. No prior programming experience is required.

Salesforce Platform App Builder Certification Guide Paul Goodey, 2020-11-13 Get up to speed with the essential concepts and techniques necessary to prepare for the Salesforce Platform App Builder certification exam Key FeaturesPrepare for the Salesforce Platform App Builder certification exam by exploring important concepts and expert tips and techniquesDesign the data model, user interface, business logic, and security for custom appsUnderstand the key milestones and considerations when managing an application lifecycleBook Description Do you want to be able to confidently design and build apps that support business processes within the Lightning Platform? Salesforce Platform App Builder Certification Guide not only helps you to do this, but also prepares you for the certification exam. The book starts by describing the core capabilities of the Lightning Platform. You'll learn techniques for data modeling to design, build, and deploy apps without writing code and achieve rapid results with the declarative capabilities that the Lightning Platform provides. Next, you'll explore utilities for importing and exporting data and the features available in the Lightning Platform to restrict and extend access to objects, fields, and records. You'll also be able to customize the Salesforce Lightning Experience user interface (UI)

and build functionality for custom buttons, links, and actions. Later, this certification study guide will take you through reporting and the social and mobile features of the Lightning Platform. Finally, you'll get to grips with Salesforce build environments and deployment options. By the end of this Salesforce book, you'll not only have learned how to build data models, enforce data security, and implement business logic and process automation, but also have gained the confidence to pass the Platform App Builder exam and achieve Salesforce certification. What you will learn

Explore the core features of the Lightning Platform
Design and build an appropriate data model for a given scenario
Identify the Lightning Platform's features and capabilities
Customize the Salesforce Lightning Experience UI
Implement business logic and process automation
Identify the capabilities of declarative customization

Who this book is for
This book is for beginners and aspiring developers who want to learn how to build apps on the Salesforce Platform or pass the Salesforce Platform App Builder certification exam. Salesforce administrators and existing Salesforce Lightning Platform developers looking to learn more about the declarative, non-programmatic app building capabilities of the Salesforce Lightning Platform will also find this book useful.

Ultimate Salesforce LWC Developers' Handbook Cihan Fethi Hizar, 2023-12-20

Unleash Lightning Web Components (LWC) for Salesforce Cloud

KEY FEATURES

- Acquire a comprehensive understanding of the Lightning Web Component Framework, covering all its intricate details.
- Develop advanced skills in effectively managing events and data within your Lightning Web Component (LWC) applications.
- Gain expertise in ensuring the security of your LWC applications by leveraging the robust tools provided by Salesforce.

DESCRIPTION

Embark on a transformative journey into the world of Salesforce Lightning Web Components (LWC) with this comprehensive guide. From laying the foundation to honing advanced skills in LWC debugging and testing, each chapter seamlessly builds upon the last, empowering developers to navigate the intricate world of Salesforce LWC development. The book begins by creating your first LWC and delving into the intricacies of Lightning Web Components. It explores the seamless integration of Salesforce Data and master event management with Events in LWC. Next, it moves on to navigate the relationship between LWC and Flows, unlocking the potential of Lightning Out for standalone applications. Readers will dive deep into the aesthetics with Salesforce Lightning Design System, enhancing their components with style. It will also help you safeguard your applications by understanding LWC Security measures and learn debugging and testing in the LWC environment. In the final chapters, immerse yourself in working with Aura components and seamlessly migrate them to LWCs, providing an insightful transition to advanced development techniques.

WHAT WILL YOU LEARN

- Master the intricacies of Lightning Web Component (LWC) development for the Salesforce Cloud.
- Effectively utilize Lightning Data Service for seamless data management.
- Establish robust communication channels between Lightning Web Component (LWC) using Lightning Message Service.
- Integrate your Lightning Web Components (LWC) seamlessly into complex flows.
- Create standalone applications with the powerful capabilities of Lightning Out.
- Perfect the art of styling your components using the Lightning Design System.
- Implement

advanced security measures to ensure the development of robust and secure LWC applications. WHO IS THIS BOOK FOR? This book is meticulously designed for Salesforce developers, consultants, IT professionals aiming to broaden their expertise into Lightning Web Components, seeking comprehensive insights and expanding their skill set. Whether you're a beginner or an experienced professional in the Salesforce ecosystem, this handbook provides a practical and in-depth resource to enhance proficiency in Lightning Web Components, covering debugging, testing, and advanced development techniques. TABLE OF CONTENTS 1. Introduction 2. Creating Your First LWC 3. LWC in Detail 4. Using Salesforce Data 5. Events In LWC 6. LWC and FLOWS 7. Lightning Out 8. Salesforce Lightning Design System 9. LWC Security 10. LWC Debugging and Testing 11. APPENDIX 1: AURA-LWC Co-Existence 12. APPENDIX 2: Migrate Aura Components to LWCs Index

Mastering Salesforce Reports and Dashboards David Carnes, 2023-06-14 Effective, repeatable, and insightful analytics are key to ROI in customer relationship management systems. Many organizations, however, lack the automated reporting tools they need to run their businesses and instead choose to massage the data in Excel. But there's a better way. Salesforce's standard reporting tools provide a rich set of features that, when combined, support a wide variety of analytics needs. This practical introduction covers all the aspects and features you need to be successful with Salesforce reports and dashboards. Author David Carnes, chairman and chief evangelist for OpFocus, shows executives, end users, and report and dashboard superusers what analytics are possible, which features report writers should ask to be enabled, and which settings and permissions system administrators need to activate. You'll learn: How to create reports using the four main report formats in Salesforce How to create and use dashboards Methods for storing and finding reports and dashboards How to leverage formulas and trending in Salesforce reporting Special reporting features only available in Salesforce Mobile and on the Analytics tab Ways to embed report charts and dashboards in Lightning page layouts Powerful combinations of reporting features to drive decisions

Practical Guide to Salesforce Communities Philip Weinmeister, 2018-06-23 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

Salesforce CRM Admin Cookbook. Paul Goodey, 2017-12-22 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. About This Book 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. 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. 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 In Detail 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. Style and approach We will be discussing recipes about several modules, which will help you gain mastery over different modules, such as data management, security enhancements, and so on, which is expected of an administrator.

Salesforce Platform Enterprise Architecture Andrew Fawcett, Daniel J. Peter, 2023-03-31 Deliver impressive enterprise-grade applications using the Salesforce Platform with the help of established architectural patterns and best developer practices. Key Features Use the latest capabilities of the Salesforce Platform to code robust apps and web experiences, with an extended focus on Lightning Web Components Branch out to Java, Node.js, and other languages with a new chapter exploring app development capabilities using Heroku and Functions Extend your application with access to external services following new coverage of OpenAPI enabled API services Book Description Salesforce makes architecting enterprise grade applications easy and secure - but you'll need guidance to leverage its full capabilities and deliver top-notch products for your customers. This fourth edition brings practical guidance to the table, taking you on a journey through building and shipping enterprise-grade apps. This guide will teach you advanced application architectural design patterns such as separation of concerns, unit testing, and dependency injection. You'll also get to grips with Apex and fflib, create scalable services with Java, Node.js, and other languages using Salesforce Functions and Heroku, and find new ways to test Lightning UIs. These key topics, alongside a new chapter on exploring asynchronous processing features, are unique to this edition. You'll also benefit from an extensive case study based on how the Salesforce Platform delivers solutions. By the end of this Salesforce book, whether you are looking to publish the next amazing application on AppExchange or build packaged applications for your organization, you will be prepared with the latest innovations on the platform. What you will learn Create and deploy packaged apps for your own business or for AppExchange Understand Enterprise Application Architecture patterns Customize the mobile and desktop user experience with Lightning Web Components Manage large data volumes with asynchronous processing and big data strategies Learn how to go beyond the Apex language, and utilize Java and Node.js to scale your skills and code with Heroku and Salesforce Functions Test and optimize Salesforce Lightning UIs Use Connected Apps, External Services, and Objects along with AWS integration tools to access off platform code and data with your application Who this book is for If you are a Salesforce developer who wants to unlock the true potential of the Salesforce platform and deliver complex, scalable applications within your company or for use in large enterprises you target through AppExchange, then you have come to the right place. You will need a solid foundation of Salesforce development to dive into this book - it is here to elevate your skills, not teach you the basics.

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Learning Salesforce Visual Workflow Rakesh Gupta, 2015-04-29 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.

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Table of Contents Salesforce Template Builder

1. Understanding the eBook Salesforce Template Builder
 - The Rise of Digital Reading Salesforce Template Builder
 - Advantages of eBooks Over Traditional Books
2. Identifying Salesforce Template Builder
 - Exploring Different Genres
 - Considering Fiction vs. Non-Fiction
 - Determining Your Reading Goals
3. Choosing the Right eBook Platform
 - Popular eBook Platforms
 - Features to Look for in an Salesforce Template Builder
 - User-Friendly Interface
4. Exploring eBook Recommendations from Salesforce Template Builder
 - Personalized Recommendations
 - Salesforce Template Builder User Reviews and Ratings
 - Salesforce Template Builder and Bestseller Lists
5. Accessing Salesforce Template Builder Free and Paid eBooks
 - Salesforce Template Builder Public Domain eBooks
 - Salesforce Template Builder eBook Subscription Services
 - Salesforce Template Builder Budget-Friendly Options
6. Navigating Salesforce Template Builder eBook Formats
 - ePub, PDF, MOBI, and More
 - Salesforce Template Builder Compatibility with Devices
 - Salesforce Template Builder Enhanced eBook Features
7. Enhancing Your Reading Experience
 - Adjustable Fonts and Text Sizes of Salesforce Template Builder
 - Highlighting and Note-Taking Salesforce Template Builder
 - Interactive Elements Salesforce Template Builder
8. Staying Engaged with Salesforce Template Builder
 - Joining Online Reading Communities
 - Participating in Virtual Book Clubs
 - Following Authors and Publishers Salesforce Template Builder
9. Balancing eBooks and Physical Books Salesforce Template Builder
 - Benefits of a Digital Library
 - Creating a Diverse Reading Collection Salesforce Template Builder
10. Overcoming Reading Challenges
 - Dealing with Digital Eye Strain
 - Minimizing Distractions
 - Managing Screen Time
11. Cultivating a Reading Routine Salesforce Template Builder
 - Setting Reading Goals

- Salesforce Template Builder
 - Carving Out Dedicated Reading Time
- 12. Sourcing Reliable Information of Salesforce Template Builder
 - Fact-Checking eBook Content of Salesforce Template Builder
 - Distinguishing Credible Sources
- 13. Promoting Lifelong Learning
 - Utilizing eBooks for Skill Development
 - Exploring Educational eBooks
- 14. Embracing eBook Trends
 - Integration of Multimedia Elements
 - Interactive and Gamified eBooks

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