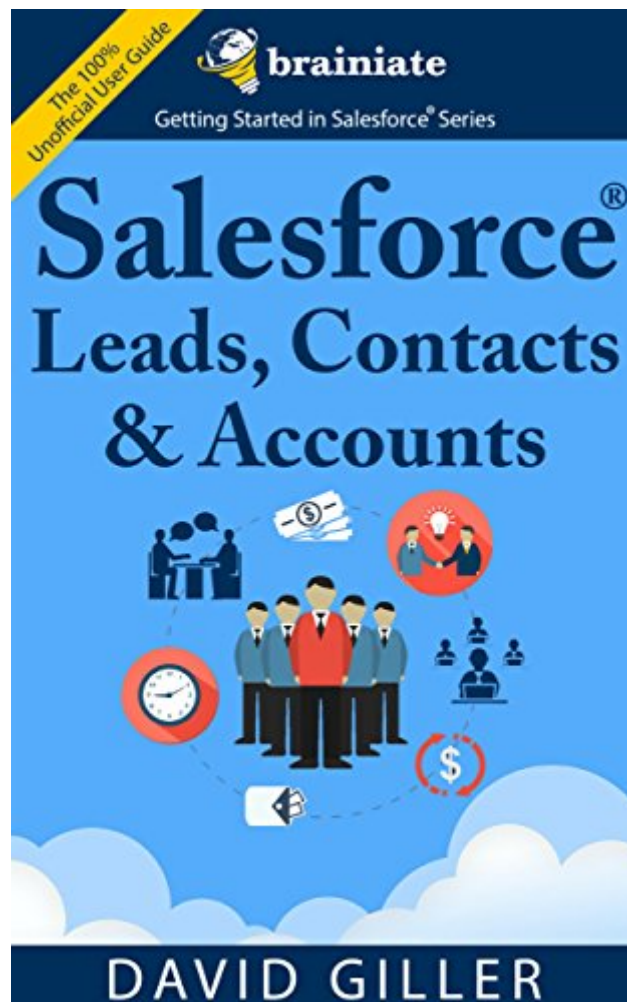# Salesforce Leads, Contacts & Accounts For Beginners: The Quick And Simple Way To Track Your Leads, Contacts, Vendors, Customers And Partners In Salesforce (Getting Started With Salesforce Book 1)

Synopsis

This book will enable you to make more money by:- helping you work more efficiently, quickly finding and following up with your clients and prospects in Salesforce;- ensuring that your clients and prospects are not "lost" in your Salesforce database;- increasing your knowledge and expertise in Salesforce, making you more marketable in today's competitive job market. In this book you will learn how to:- import your leads, prospects, customers, competitors, vendors into Salesforce- assign individual and company entries to particular members of your team- find Salesforce leads, contacts and accounts with minimal clicks- edit and update your Salesforce records- clone and delete Salesforce leads, contacts and accounts- eliminate duplicate records using Salesforce merge functionality- create List Views to easily find those Salesforce records that require the most attentionTable of ContentsSection 1: Leads Understanding Leads- What Is A Lead?- What Is The Difference Between A Lead And A Contact?- How To Access Leads- Recent Leads- Searching For Leads Using List Views For Leads- Use Existing List Views For Leads- Creating A Custom List View For Leads Creating A New Lead- How To Create A New Lead Record- Importing Leads From Other Sources- Cloning Leads Manage Existing Leads- Editing Leads- Changing Lead Ownership- Printing Lead Information- Related Objects- Merging Duplicate Leads- Deleting Leads- Converting Leads Section 2: Contacts Understanding Contacts- What Is A Contact?- What Is The Difference Between A Contact And A Lead?- What Is The Difference Between A Contact And An Account?- How To Access Contacts- Recent Contacts- Searching For Contacts Using List Views For Contacts- Use Existing List Views For Contacts- Creating A Custom List View For Contacts Creating A New Contact- Creating A New Contact From The Contacts Tab- Creating A New Contact From Any Account Record- Creating A New Contact From The Side Panel- Importing Contacts From Other Sources- Cloning Contacts Manage Existing Contacts- Editing Contacts- Changing Contact Ownership- Printing Contact Information- Related Objects- Merging Duplicate Contacts- Deleting Contacts Section 3: Accounts Understanding Accounts- What Is An Account?- What Is The Difference Between A Contact And An Account- How To Access Accounts- Recent Accounts- Searching For Accounts Using List Views For Accounts- Use Existing List Views For Accounts- Creating A Custom List View For Accounts Creating A New Account- How To Create A New Account Record- Importing Accounts From Other Sources Manage Existing Accounts- Editing Accounts- Changing Account Ownership- Printing Account Information- Related Objects- Merging Duplicate Accounts- Deleting AccountsAbout the AuthorDavid Giller is the Founder and CEO of Brainiate, helping companies unleash the power of Salesforce® to streamline, simplify and automate business processes. David is an attorney, Six Sigma Green Belt, a Certified Salesforce

Administrator was previously on the Salesforce team at GE Capital. At GE Capital, David managed Salesforce related customizations, integrations, third party applications and training across Sales and Marketing including lead and contact management, pipeline reporting, marketing automation, campaign management, NPS surveys and more. David currently coaches organizations how to streamline their business processes & introduce efficiencies by eliminating redundant, time consuming steps on the Salesforce platform.

Book Information

File Size: 8986 KB

Print Length: 143 pages

Publisher: Brainiate (May 22, 2015)

Publication Date: May 22, 2015

Sold by:Â Digital Services LLC

Language: English

ASIN: B00XTA4WW0

Text-to-Speech: Enabled

X-Ray: Not Enabled

Word Wise: Enabled

Lending: Not Enabled

Enhanced Typesetting: Enabled

Best Sellers Rank: #374,398 Paid in Kindle Store (See Top 100 Paid in Kindle Store)   #52 inÂ Kindle Store > Kindle eBooks > Computers & Technology > Operating Systems > MacOS   #163 inÂ Books > Computers & Technology > Operating Systems > Macintosh   #390 inÂ Kindle Store > Kindle eBooks > Business & Money > Business Life > Time Management

Customer Reviews

As a frequent user of Salesforce.com for several years, a book like this would have been so helpful to have 5 years ago! David does a great job explaining the relationship between the lead, contact and account objects in Salesforce, which even helps as a refresher for experienced users too. I would highly recommend this book to anyone just getting started ... Salesforce is an amazing tool and can sometimes be overwhelming but David Giller really breaks it down into understandable pieces. I hope he releases more books like this - Salesforce has so much to offer and his expertise is clear!

I am an experienced admin. However, after going through this book I can honestly say that if it was around when I was starting out it would have helped immensely! The layout of the book makes it easy to read. I also like the way it covers the main objects but also answers some "big" common questions that I know I asked when I was starting to work with Saleforce.com! One last point because the book is so new its nice to see screenshots that up to date too; for the new admin I'm sure it makes it easier! Well done!

A long time user of Salesforce, I am consistently frustrated by the lack of direction offered by the company in using their solution. Existing books either do not provide enough information, or are overly complex â " either way, not helpful. Mr. Giller starts with the ABCs of Salesforce and allows you to grow at a reasonable pace with the ultimate goal of developing best practices and maximize usage on the powerful resources Salesforce can provide (finally!). I look forward to more books in the series, and offer Mr. Giller kudos on a job well done.

An awesome deep dive into the Standard Salesforce objects of Leads, Contacts, and Accounts describing the relationships among these objects. If you are a beginner, I would definitely recommend this book, as it simplifies and translates the Salesforce language into something that we would be able to understand :). The instructions illustrated in this book will enable someone who is brand new to Salesforce to be able to navigate and perform tasks as an admin very quickly.

Great book for Salesforce beginners!Thanks David for taking the time to write it and share it with others.I always tell new users and admins that it's highly important to understand the Salesforce data model basics and you've done this in a very friendly way.Well done and I'm looking forward for book #2, #3 etc...

Could be slightly useful to someone who has never at all touched salesforce, but salesforce is generally pretty intuitive and most common users don't need any training, and even if you do, salesforce offers similar support online for free so you don't have to spend money on a book like this.

Download to continue reading...

Salesforce Leads, Contacts & Accounts for Beginners: The quick and simple way to track your leads, contacts, vendors, customers and partners in Salesforce (Getting Started with Salesforce Book 1) Eye Contacts, Lasik Eye Surgery, Or Eyeglasses: The Pros and The Cons (Blue

Contacts,Discount Contact Lenses,Eye Lenses,Prescription Colored Contacts) Getting Started with Geese (Getting Started with... Book 4) Getting Started Making Metal Jewelry (Getting Started series) Explosive Leads Generation Marketing for Lawyers: The Attorneys' Secret Guide to Generating Unlimited Leads On Total On Auto-Pilot 24/7 And Exploding Your Bottom Line in 30 Days or Less Blogging for Beginners: Learn How to Start and Maintain a Successful Blog the Simple Way - BLOGGING for BEGINNERS/BLOGGING: Blogging for Beginners (Computers ... Design, Blogging, WordPress for Beginners) iPad Guide For Beginners (For iPad / iPad Air / iPad Mini): Getting Started With Your iPad (Do it with iPad - Beginners Book 1) Casino City's Worldwide Casino Vendors Guide: Gaming Products and Services, Industry Suppliers, Casinos, Agencies, Associations, Trade Shows and Publications, Analysists, and Attorneys (2006) Airframe Test Guide 2015: The "Fast-Track" to Study for and Pass the Aviation Maintenance Technician Knowledge Exam (Fast-Track Test Guides) Powerplant Test Guide 2015: The "Fast-Track" to Study for and Pass the Aviation Maintenance Technician Knowledge Exam (Fast-Track Test Guides) Powerplant Test Guide 2017: The "Fast-Track" to Study for and Pass the Aviation Maintenance Technician Knowledge Exam (Fast-Track Test Guides) Airframe Test Guide 2016: The "Fast-Track" to Study for and Pass the Aviation Maintenance Technician Knowledge Exam (Fast-Track Test Guides) General Test Guide 2015: The "Fast-Track" to Study for and Pass the Aviation Maintenance Technician Knowledge Exam (Fast-Track Test Guides) Meals by Blood Type: Getting Your Life Back on Track With 35 Recipes That Fit Your Blood Type (Blood Type Diet & Low Cholesterol) Reiki: The Ultimate Guide to Mastering Reiki for Beginners in 30 minutes or Less! (Reiki - Reiki Healing - Reiki For Beginners - Yoga for Beginners - Meditation ... Beginners - Kundalini For Beginners - Zen) iOS 7 Mail, Contacts, Calendar, Reminders Quick Reference Guide: for iPad, iPhone, and iPod touch (Cheat Sheet of Instructions, Tips & Shortcuts - Laminated Guide) Microsoft Outlook 2010 Calendar, Contacts, Tasks Quick Reference Guide (Cheat Sheet of Instructions, Tips & Shortcuts - Laminated Card) Med School Rx: Getting In, Getting Through, and Getting On with Doctoring Start Your Own Computer Business: Building a Successful PC Repair and Service Business by Supporting Customers and Managing Money Likeable Social Media: How to Delight Your Customers, Create an Irresistible Brand, and Be Generally Amazing on Facebook (And Other Social Networks)