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| Nota di contenuto | Cover; Copyright; Credits; About the Author; Acknowledgement; About the Reviewers; www.PacktPub.com; Table of Contents; Preface; Chapter 1: Working with Home Page Components and Custom Links; Introduction; Creating a Personal Setup link using the standard Custom Links on the sidebar; Using Custom Links to open Training in a new window from the sidebar; Creating a news-ticker message on the Home Page; Automatically collapsing Chatter feeds on the home page; Removing Chatter feeds on the home page; Adding a Send An Email button on the Home Page Showing Opportunity Sales Stages descriptions on the home page Chapter 2: Advanced User Interface; Introduction; Displaying Case Priority flags using a formula field and salesforce.com images; Building an Account Revenue indicator using a formula field and custom images; Creating a clutter-free Account tab using Visual force; Showing a tabbed Account Detail page using Visual force; Rendering an Account credit score graphically using JavaScript, CSS,; and Visual force; Presenting an Account credit score graphically using a Google image chart; Chapter 3: Exposing Hacks and Hidden Features Introduction Extending the year range to 2025 on calendar pop ups for |

all date fields in Salesforce; Populating a historic year range from 1920 on calendar pop ups for all date fields in Salesforce; Creating a custom Log A Call button from accounts with prepopulated fields; Presenting an integrated view of cases on the home page; Removing the "discover what's new in this release" button from the home page; Chapter 4: Automating Salesforce CRM; Introduction; Deriving year and month values from the opportunity close date using a formula
Calculating the week number for the opportunity close date using a formula
Creating an opportunity close date e-mail alert using workflow; Setting a default opportunity name using a field update workflow; Generating a default opportunity close date using a field update workflow; Chapter 5: Improving Data Quality in Salesforce CRM; Introduction; Stopping non-system administrators from changing account names with a validation rule; Enforcing the use of two-letter account country codes using a validation rule; Validating if US zip codes are well formed using a validation rule with REGEX
Validating if UK postcodes are well formed using a validation rule with REGEX
Creating a mandatory Reason Lost field for lost opportunities using a validation rule; Chapter 6: Implementing Approval Processes; Introduction; Creating an e-mail template for use with approval assignments; Setting up a user to be associated with an approval process; Building an opportunity approval process for deals greater than USD 100,000; Chapter 7: Productivity Tools for Superusers and Advanced Administration; Introduction; Converting a 15-digit Salesforce opportunity ID to 18 digits using a formula field
Generating help pages for custom objects using Visualforce and a PDF document

Sommario/riassunto

This book is written in a Cookbook-style format and provides you with immediately usable recipes that extend the functionality of Salesforce CRM and solves real-world problems encountered within the Salesforce CRM application. The recipes in this Cookbook contain proven, step-by-step instructions along with detailed screenshots. This Cookbook has been designed so that you can read it chapter by chapter, starting with recipes that provide enhancements to the user interface, and finishing with recipes that cover data and systems integration. You can also refer to the list of recipes and choose to
