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Salesforce side, the advantage of using standard objects is that we do not move away from the Salesforce standard, but users are still able to easily customize, for example by buying apps on the AppExchange.

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working with a  
CRM-system  
called  
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The main feature  
of Salesforce is  
called an ... It  
will also allow  
the user to  
assign a task to  
a different

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committee when a  
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interest in a

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question or  
comment in  
customer  
community forum  
cannot be  
resolved right  
away by a  
community  
manager and must  
be escalated to  
another employee  
via a CRM  
system.

Vanilla's

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integration  
allows users  
with the right  
permissions to  
create a Lead or

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This guide is  
specifically  
designed for end

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users of RingCentral for Salesforce. This guide is not intended for system/network administrators and does not provide any information on how to set up the application on user desktops or how to

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configure the  
Salesforce.com  
instance to be  
able to use this  
application.

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and what each piece of data means. 3.

Ultimate  
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Guide. Buckle up  
and get ready  
for this 3818  
page ride. Some  
have referred to  
this as the  
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STRATFOR CRM  
Application User  
Manual Page 2 of  
6 Introduction  
STRATFOR uses  
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for Customer  
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Management  
(CRM) .

Salesforce is

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highly customizable and is used by thousands of organizations with a wide variety of sales processes; as such, it is important to

**Getting Started  
with Salesforce  
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salesforce help;  
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Settings: Click  
the Settings  
link under the  
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user, at the top right of any page. From there, you can modify your personal settings. If you're an administrator, use Setup to customize, configure, and administer Salesforce.



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customer get the quotation? Most of the time, your email to a client or prospect is

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The Salesforce  
Certified  
Administrator



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exam is intended  
for an

individual who  
has experience  
performing as a  
Salesforce  
Administrator.

ADMINISTRATOR

Here are  
examples of the  
concepts you  
should  
understand to  
pass the exam: •

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Managing users,  
data, and  
security •

Maintaining and  
customizing  
Sales Cloud and  
Service Cloud  
apps

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In addition to SteveMo's great suggestions, on the more fundamental side, the one and only Tom Wong co-wrote "Salesforce.com for Dummies". If you're looking for something really comprehensive I

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recommend

"Salesforce.com

Secrets of

Success" by

David Taber.

It's a great

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implementation

following best

practices of

Business

Analysis.

**Salesforce.com**

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Salesforce 101 is a resource for nonprofit and educational organizations developed and maintained by Cloud for Good. It contains a glossary, user manual, blog posts, and

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Salesforce has  
become a primary  
hub for most  
companies'  
customer  
management

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needs. But,  
let's be honest,  
the amount of  
data Salesforce  
provides can be  
a bit  
overwhelming to  
the average  
user. In or...

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or how to  
configure the  
Salesforce.com  
instance to be  
able to use this  
application.

This user guide  
will show you  
how to use this  
application, and  
provide known is  
sues/limitations  
of the  
application as



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well as some  
basic

troubleshooting  
questions and  
answers.

RingCentral for  
Salesforce  
version 3.40 and  
later includes  
Salesforce1.

## **RingCentral for Salesforce User Guide**

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I am currently setting up a CSV file for lead uploads via Data Loader and at this stage I keep getting told the user ID data is wrong so after some research I found out i need the user ID "number" does anyone know

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how I get this?  
any help would  
be majorlly  
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