

Sales Force ADMIN Course Content

Introduction to CRM:

Why CRM?

Introduction to Cloud Computing & Salesforce.com

Cloud Computing - Overview

What is Software-as-a-Service (SAAS)?

What is Platform-as-a-Service (PAAS)?

What is Infrastructure-as-a-Service (IAAS)?

What is Salesforce.com?

Salesforce.com CRM Editions

Salesforce Architecture – Cloud Computing is a Better Model Multi-tenant Salesforce Editions / Pricing

Salesforce.com Navigation - Overview:

Salesforce Certifications

Certified Force.com Developer(401)

Certified Administration (201)

Certified Advanced Force.com Developer(501), etc.,

Database Introduction:

Database Model - Object Creation

Salesforce Building Blocks

Standard Objects

Create custom Objects

CRM functionality in Salesforce and use of standard objects Custom Objects Vs. Standard Objects

Create custom Fields

Create custom Tabs

Types of Tab:

Standard Objects – Account, Contacts, Leads, Campaigns, Opportunities etc., Custom object Tabs

Web Tabs

Visual force Tabs

Custom Application:

Limitations

Field Creation and its Relationships a. Different Data types Standard Data types :

1. Text, Email, Number, Currency, URL, Text Area.
2. Storage Limitations

Read only Data types:

1. Auto Number, Formula and Rollup summary
2. Rollup summary Operations
3. Sum(), Min(), Max() and Count

Relational Data types:

Lookup Vs. Master - Detail
Relationship Limitations
Required, External Id, Default Value and Unique fields

Salesforce Application elements: Home Page, Tabs, Tab Home Pages, Detail Page, Side Bar, Apps, Record

Page Layouts:

Defining Page layouts
Field order changes
Adding custom buttons and links
Defining required and read only fields
Adding related list

Record Types:

To create and maintain record types for your organization.
Display different page layouts and picklist values based on record types. Uses of Record Types

Field Dependencies:

Controlling field/Dependent field?
Making dependent pick list fields
Limitations

Validation Rules:

Defining Salesforce Data Validation
Creating Custom Validation Rules
Validation Vs. Trigger

Workflow rules:

Define workflow

- Create Email template

- Set up workflow rules

- Set up workflow actions

Workflow Approval process:

Plan approvals using workflow
Use the approval wizard – standard vs. jump
start Create workflow approvals

Email Templates:

Email Templates – Sending Single emails and Mass emails.
Types of Templates - HTML (Using Letter Head) , Custom HTML (without using letter head), Visual force Email Templates

Data Management:

Import Wizard Vs Data Loader
Importing Overview
Exporting Overview
Import custom object records using the Data Loader
Use mass delete
Use storage

Personal Setup:

Managing Personal
Information Password Reset
User Management Overview
Roles, Users, Profiles & Sharing

Users, Roles and Profiles:

Creating Users
User Licenses Overview
Understanding Record Ownership and Access Role Hierarchy
Profiles

1. Overview and different profiles
2. User Permissions

Security:

Managing the Users
Set Organization Wide Defaults
(OWD) Object-level Security
Field-level Security

Record-level Security
Sharing Rules

1. Define Sharing rules
2. Discuss about types of sharing rules

Reports & Dashboards

AppExchange:

Installing an App
Uninstalling an App