

Overview: ADM-201-ADMINISTRATION ESSENTIALS FOR NEW ADMINS (EE/UE) (ADM-201)

Comprehensive and hands-on, Administration Essentials for New Admins is the core training that en before starting a Salesforce deployment or when taking over an existing deployment.

Objectives

At the end of Salesforce for Administrator training course, the participants will be able to:

Customize application, including page layouts, fields, tabs and business processes

Create a secure Salesforce environment

Maintain and import clean data

Create high-value reports and dashboards

Set up workflow automation

Suggested Audience

New system administrators responsible for the setup, configuration, and maintenance of their organi

Other groups that would benefit from deepening their knowledge of Salesforce, including power user

Duration - 5 Days

Overview: DEV-401 & DEV-501-BUILDING APPLICATIONS USING FORCE.COM & VISUALFOR

The comprehensive hands-on course is a must for new application developers who want to create cl declarative "clicks not code" capabilities of the Force.com cloud platform to create new applications :

Objectives

At the end of Salesforce for Developer training course, the participants will be able to:

Build and customize multi-user cloud applications with just clicks

Define an application's data model

Customize the user interface

Create advanced workflows and validation rules

Automate business processes

Manage your data

Develop a custom user interface with Force.com pages

Duration - 5 Days

Suggested Audience

Application Developers who want an in-depth understanding of how to use the declarative capabilities course provides the foundation for developers who need to know how to leverage these capabilities :

ADMINISTRATION ESSENTIALS FOR

Day-01 1. Getting Around the App

Day-01 2. Getting Your Organization Ready for Users

Day-01,
Day-02 3. Setting Up and Managing Users

Day-02,
Day-03 4. Security and Data Access

Day-02,
Day-03 5. Customization: Fields

Day-03, 6. Managing Data
Day-04

Day-03, 7. Automation
Day-04

Day-04, 8. Managing the Support Process
Day-05

Day-04, 9. Reports and Dashboards
Day-05

R NEW ADMINS (EE/UE) (ADM-201)

Activate your computer-Setting up ENVIRONMENT

Setting Up the USER INTERFACE

Set up the UI & SEARCH options

Understand the data model and navigation

Find answers in Help & Training

Set up the company profile

Configure the user interface

Set up activities and calendars

Configure search settings

Set up Chatter

ORGANIZATION Administration

Set your ORGANIZATION's LANGUAGE & LOCALE

Manage user profiles

Create and manage users

Troubleshoot user login issues

Set up Chatter Free and Chatter external users

Restrict logins

Determine object access

Manage record access with the role hierarchy

Deal with record access exceptions

Manage field-level security

Create & manage your USERS

Set ORGANIZATION-WIDE DEFAULTS

Learn about RECORD ACCESS

Create the ROLE HIERARCHY

Learn about the SHARING MODEL

Manually SHARING RECORDS

Set up OPPORTUNITY TEAM SELLING & ACCOUNT TEAMS

Learn about FOLDER ACCESS

Create CUSTOM PROFILES & CUSTOM FIELDS

Define DEPENDENT PICK LISTS

Customize LOOKUP FIELDS & FORMULA FIELDS

Customize PAGE LAYOUTS

Customize standard RELATED LISTS

Learn about RECORD TYPES & BUSINESS PROCESSES
Use FIELD-LEVEL SECURITY

Learn about SALESFORCE CRM DATA VALIDATION

Create DATA VALIDATION RULES

Learn about custom fields & unique properties Data Utilities

Import records using the IMPORT WIZARDS

Use MASS DELETE

Use MASS TRANSFER

Learn about STORAGE utilization

Use the integrated CAMPAIGN builder

Learn about LEAD QUEUE & LEAD ASSIGNMENT setup

Learn WEB-TO-LEAD & AUTO-RESPONSE RULES

Manage email administration

Set up workflow rules

Automate the support process

Understand the Service Cloud console

Enable collaboration in the Service Cloud

Analyze support data with reports and dashboards

Learn about CASES & SOLUTIONS

Set up CASE ESCALATION RULES

Identify SOLUTION CATEGORIES & suggested solutions

SALESFORCE Console

Navigate the SALESFORCE Console

Create a SALESFORCE Console

Extending SALESFORCE CRM

Learn about CUSTOM OBJECTS

Learn about CUSTOM TABS

Learn about CUSTOM WEB TABS

Build a CUSTOM APP

Collaboration

Chatter and Chatter Free

Email Administration and Email Templates

Tracking Tasks and Events

Define WORKFLOW

Set up WORKFLOW RULES

Set up WORKFLOW TASKS & ALERTS

Plan APPROVALS using WORKFLOW

Use the APPROVAL WIZARD – standard vs. jump-start
Create WORKFLOW APPROVALS

The APPEXCHANGE

Learn about the APPEXCHANGE

Install an APPLICATION

Uninstall an APPLICATION

Run and modify reports, Create new reports with the report builder, Filter reports, Summarize report data with formulas and visual summaries, Print, export, and email reports, Build dashboards

Create custom REPORTS

Use advanced FILTERS

Use CONDITIONAL HIGHLIGHTING

Use CUSTOM SUMMARY FORMULAS

Create DASHBOARDS

BUILDING APPLICATIONS USING FORCE.COM

Day-01 1. Designing Applications on Force.com

Day-02 2. Designing Applications for Multiple Users

Day-02, 3. Implementing Business Processes
Day-03

Day-03, 4. Managing Data
Day-04

Day-03, 5. Force.com Pages
Day-04

Day-03, 6. Force.com Code (Apex)
Day-04,
Day-05

Day-03, 7. Visualforce Controllers
Day-04,
Day-05

CRM & VISUALFORCE (DEV-401)-APEX AND VISUALFORCE CONTROLLERS

Data Model and Navigation

Help & Training

Learn about factors to consider when building a data model

Develop custom objects and fields, encrypted fields, field help, field history tracking

Use master-detail, lookup, and many-to-many relationships

Create a user interface for custom applications using the custom object tab, page layout customization options

Set field attributes on the page layout

Use custom object queues and event-based workflow rules with field update actions

Develop custom formulas and validation rules

Learn about factors to consider when designing applications for multiple users

Create profiles, understand what a profile controls (including data access), and customize profiles to manage the user experience

Create and customize permission sets to manage the user experience

Customize the user experience with record types and page layouts

Control access to records

Employ organization-wide defaults (OWDs), sharing rules and levels, roles, public group manual share

Apply profiles, OWDs, role hierarchy, and sharing to restrict access to sensitive data

Apply OWDs, public groups, and manual sharing to create conditional access to data

Analyze suitability of field-level security, page layouts, types to satisfy business requirements

Use the VLOOKUP, REGEX, ISCHANGED, ISNEW, and PRIORVALUE functions to build business processes

Use validation rules to enforce conditional required behavior

Use functions to enforce data format and data consistency

Implement multi-step approval workflows and escalations to automate business processes

Create parallel approval processes and approval processes with dynamic approval routing

Use outbound messages as part of an approval process

Establish approval process criteria with cross-object formulas

Set up field history tracking to audit processes

Learn techniques to prevent or record data changes

Learn when and how to use upsert

Determine object access

Use data management tools and the capabilities of API-based tools

Deal with record access exceptions

Use the Force.com data loader to create mapping files and to upsert data

Learn about the capabilities of Force.com pages

Incorporate Force.com pages into Salesforce CRM

Construct expression bindings and incorporate Salesforce CRM into Force.com pages with components

Use Force.com pages components to create page layouts, input forms, output tables, custom components, and more

Create partial page refreshes on JavaScript events

Learn about the functionality that comes with Force.com pages standard controllers

Find out when Force.com code is required for creating custom controllers or extensions

Describe the features, functionality, and use cases of Apex

Describe the data types and syntax of Apex

Describe how multi-tenancy affects Apex

Write queries and complex joins using SOQL

Write text-based searches using SOSL

Manipulate data using Apex DML

Write Apex triggers to automate code

Describe the testing requirements of the Force.com platform

Write Apex tests

Create Apex web services using REST and SOAP

Create callouts to external web services

Send and receive email from Apex

Write asynchronous Apex (batch, @future, and scheduled)

Describe the capabilities of custom settings

Understand the Visualforce framework, including its advantages and capabilities

Use expressions to bind data and actions on a page to a controller

Understand the concepts behind controllers, including their functionality and capabilities

Create custom controllers and standard controller extensions to incorporate new data and actions into a page

Understand the security implications of using custom vs. standard controllers

Implement wizards using custom controllers to handle the state and operations

Create custom components that use custom controllers

Test, debug, and deploy controllers
