

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

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 cu 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

Suggested Audience

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

1. Getting Around the App

2. Getting Your Organization Ready for Users

3. Setting Up and Managing Users

4. Security and Data Access

5. Customization: Fields

6. Managing Data

7. Automation

8. Managing the Support Process

9. Reports and Dashboards

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

1. Designing Applications on Force.com

2. Designing Applications for Multiple Users

3. Implementing Business Processes

4. Managing Data

5. Force.com Pages

6. Force.com Code (Apex)

7. 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 page components to create page layouts, input forms, output tables, and more

Create partial page refreshes on JavaScript events

Learn about the functionality that comes with Force.com page 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
