

SALESFORCE ADMIN



Lessons 1: Cloud Computing Concepts

- What is Traditional Computing?
- Disadvantages of traditional Computing?
- What is Cloud Computing?
- Advantages of Cloud Computing over Traditional Computing?
- Phases of Cloud Computing (IAAS, PAAS, SAAS)
- Different types of Clouds?
- Architecture of Cloud Computing?

Lessons 2: CRM Overview

- What is CRM?
- How CRM can help to Business?
- Advantages of the CRM?
- What are the different types of CRM technologies in the Market?
- Why salesforce.com CRM is so famous than other CRM technologies?

Lesson 3: Salesforce Overview

- What is Salesforce.com?
- History of the Salesforce.com?
- Architecture of the Salesforce.com?
- Different Clouds in Salesforce.com?
- Different type of API's in salesforce.com?
- What is AppExchange?

Lesson 4: Salesforce

- Introduction to Salesforce
- Salesforce Overview
- Salesforce Editions
- Home Page Customization
- user Management
- Creating & Customizing Tabs
- Creating an APP
- Uploading a Company Logo
- Company Information Page
- System Overview Page
- Updating the Fiscal Year

Lesson 5: Sales Cloud

- Introduction to Sales Cloud
- Sales Cloud
- Leads Home Page
- Creating List Views
- Creating and Converting leads
- Creating Accounts
- Creating Contacts
- Creating Email Templates
- Sending Individual Mails
- Sending Mass Emails
- Creating and managing Price Books
- Creating Products
- Creating Opportunities
- Creating Activities
- Creating a Web-to-Lead Form
- Creating a Lead Assignment Rule
- Creating a Lead Queue

- Creating an Auto Response Rule
- Creating Campaigns
- Record Types

Lesson 6: Service Cloud

- Introduction to Service Cloud
- Service Cloud
- Creating Cases
- Creating Case Assignment Rules
- Creating Case Escalation Rules
- Enabling Solutions
- Creating Solutions
- Attaching Solutions to Cases
- Enabling Knowledge
- Configuring Knowledge
- Creating a Web-to-case Form
- Creating a Email-to-Case Address

Lesson 7: Applications

- Standard Applications
- Custom Applications

Lesson 8: Salesforce Objects

- Standard Salesforce Objects
- Custom Salesforce Objects

Lesson 9: Salesforce Tabs

- Custom Object Tab
- Web Tab
- Visual Force Tab

- Lighting Tab

Lesson 10: Salesforce Administration Datatypes (Fields)

- Standard Fields
- Custom Fields
- System Fields

Lesson 11: Relationships in Salesforce

- Lookup Relationship
- Master Detail Relationship
- External Lookup Relationship

Lesson 12: Page Layout Management

Lesson 13: Field Dependency

Lesson 14: Formula's

Lesson 15: Validation Rules

Lesson 16: Auto Response Rules

Lesson 17: Assignment Rules

Lesson 18: Role Hierarchy

- Introduction to Role Hierarchy
- Role Hierarchy
- Viewing Role Hierarchy
- Creating Roles
- Enabling Field History
- Creating Groups
- Creating Permission Sets
- Assigning Roles to users

Lesson 19: Profiles

- Introduction to Profiles
- Profiles
- Standard Profiles Overview
- Assigning Page Layouts
- Field-Level Security
- Custom App Settings & Access
- Tab Settings
- Record Type Settings
- Administrative Permissions
- General user Permissions
- Standard Object Permissions
- Custom Object Permissions
- Password Policies & Session Timeout
- Login Hours & IP Ranges
- Enabling Apex & Visual Force Access

Lesson 20: Creating an User

Lesson 21: Data Management

- Introduction to Data Management
- Data Management
- Importing Leads
- Importing Contacts & Accounts
- using Mass Delete
- Installing Data Loader
- Importing Records with Data Loader
- Updating Records with Data Loader
- Deleting Records with Data Loader

- Exporting Records with Data Loader
- Adding a Field in the Schema Builder
- Scheduling a Data Export
- Creating & using Sandbox
- Mass Transferring Records
- Reporting Snapshots
- Working with Tags

Lesson 22: Workflows

- Introduction to Workflow Rules
- Workflow Rules
- Creating a Workflow Rule
- Creating a Workflow Rule Field Update
- Creating a Workflow Rule Task Assignment
- Creating a Workflow Rule Email Alert

Lesson 23: Approval Process

- Introduction to Approval Process
- Dynamic Approval Process
- Multi-Step Approval Process
- Parallel Approval Process
- Approval Process Actions

Lesson 24: Security Controls

- Introduction to Security Controls
- Security Controls
- Viewing Object Security
- Changing Default Record Access
- Sharing Settings
- Field Accessibility
- Password Policies
- Session Settings

- Login Flows
- Network Access
- Activations
- Session Management
- Login Access Policies
- Certificate & Key Management
- Viewing Setup Audit Trail
- Executing Expire All passwords
- Delegated Administration
- Remote Site Settings
- Named Credentials
- File Upload & Download Security

Lesson 25: Reports

- Introduction to Reports
- Reports
- Understanding Report Formats
- Creating a Lead Report
- Creating Contacts & Account Reports
- Creating an Opportunity Report
- Adding Leads to a Campaign from a Report
- Creating a Report Chart
- Scheduling Reports
- Creating a Report Chart
- Summarizing Report Data
- Creating a Report Formula
- Exporting Reports to Excel

Lesson 26: Dashboards

- Introduction to Dashboards
- Dashboards

- Understanding Dashboard Components
- Creating a Dashboards
- Refreshing a Dashboard
- Modifying Columns on Dashboard
- Adding Filter to Dashboard
- Managing Access to Reports
- Adding a Report as a Dashboard Component
- Setting Up Dynamic Dashboard
- Enabling Dashboard for iPad
- Modifying Report and Dashboard Interfaces
- Activating the Report Builder on Profiles