SALESFORCE ADMINISTRATION

Course Details:

Digital Online Training's Salesforce Administration Training course will help you pass the Salesforce Administrator Exam (ADM 201) and the Salesforce App Builder (DEV 401) Exam. Concepts on Force.com Platform, AppExchange, SFDC Security Model, Service Cloud, Sales Cloud, Lightning App Builder, Salesforce Reports & Dashboard can be mastered in this Salesforce Training course.

Salesforce CRM has been more user-friendly and economical. The cloud-based applications of Salesforce CRM are intended for sales, services, marketing, productivity, and many more important business operations. It facilitates good software experts, fresh graduates, and beginners as well to easily manage and improve business relationships.

Who can Learn Salesforce?

✓ This is one of the most common questions raising in many people. It's obvious that guys often misunderstand that Salesforce CRM Admin training is only for IT people. Let us get a clear idea now.

✓ As you know, CRM stands for Customer Relationship Management. It is nothing but an outstanding software system that is able to manage the customers, sales, profits, products or services, and other important business considerations.

✓ So, any kind of Retail, Software, Educational, or Commercial Business needs effective CRM systems to meet success and development. Salesforce CRM is a popular cloud-based CRM system. So anyone from any professional or educational background can learn Salesforce CRM. It is really offering lots of job opportunities for technical and non-technical people throughout the world.

ONLINE TRAINING FEATURES

❖ Real Time Expert Trainers
❖ Industry Specific Scenario's
❖ Video Recording Sessions
❖ Soft Copy of Materials
❖ Interview Preparation Tips

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
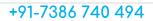- Assigning Roles to users

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

Lesson 27: Process Builder

Lesson 28: Change Sets & Deployments

- Introduction to change sets & Deployments

- Change Sets & Deployments

- Outbound Change Sets

- Inbound Change Sets

- Deployment Settings

- Deployment Status

- Eclipse IDE

Lesson 29: Communities

- Introduction to Communities

- Communities

- Creating a New Community

- Topic Management

- Recommendations management

- Reputation management

- Adding Members

- Managing Tabs & Branding

- Login & Registration

- Community Preferences

Lesson 30: Help & Training

- Introduction to Help & Training
- Help & Training
- Using Answers
- Using Ideas
- Searching for a help Topic
- Contacting Support
- Trust Site
- Known Issues

Lesson 31: Project Phases

- Project Phase Overview
- Configuration
- Development
- System Integration Testing
- Quality Analysis Testing
- User Acceptance Testing
- Deployment
- Production / Sandbox

Lesson 32: Email Administration

- Email Administration
- Deliverability
- Organization Wide Email Addresses
- Compliance BCC Email
- Test Deliverability
- Delete Attachments sent as Links
- Email Footers

Lesson 33: Mobile Administration

- Installation of Salesforce1 Mobile App
- Salesforce1 Settings
- Mobile Dashboard Settings
- Creating of Lightning Tab

Lesson 34: Domain Management

- Creation of Domain for your Organization
- Domain Settings
- GOOGLE Login
- FACEBOOK Login
- LINKDIN Login

Lesson 35: Quote Templates

Lesson 36: App Exchange

- Introduction to App Exchange
- App Exchange
- App Exchange Overview
- Finding & Selecting an App
- Finding a Developer
- Finding a Consultant

Lesson 37: Chatter

- Introduction to Chatter
- Chatter
- Chatter Overview
- Enabling Chatter
- Enabling Chatter Feeds On Records
- Configuring Chatter Groups

- Creating Customer Groups

- Creating a Free Customer Chatter User

- Customizing Salesforce to Salesforce

- Accepting a Salesforce Connection

- Sharing a Account via Salesforce to Salesforce

- Enabling Ideas

- Configuring Ideas themes

- Enabling Social Accounts

- Enabling Libraries & Content

- Customizing Libraries & Content

- Uploading Documents to Libraries & Content

- Configuring Salesforce1

Lesson 38: Other Topics

- Creation of Customer Portal

- Creation of Omni Channel

- Creating of live Agents

- Creating of SITE.Com