

Salesforce 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 :
 - Text, Email, Number, Currency, URL, Text Area.
 - Storage Limitations
 - Read only Data types:
 - Auto Number, Formula and Rollup summary
 - Rollup summary Operations
 - 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
- Overview and different profiles
- User Permissions
- Security:

- Managing the Users
 - Set Organization Wide Defaults (OWD)
 - Object-level Security
 - Field-level Security
 - Record-level Security
 - Sharing Rules
 - Define Sharing rules
 - Discuss about types of sharing rules
 - Reports & Dashboards
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- AppExchange:
 - Installing an App
 - Uninstalling an App