



Salesforce Administrator

SALESFORCE ADMINISTRATOR

1. Introduction

- Introduction to Cloud Computing
- IAAS (Infrastructure as a Service)
- PAAS(Platform as a Service)
- SAAS(Software as a Service)
- Introduction on CRM
- Introduction on Salesforce.Com
- Salesforce Sales Process (Campaign, Lead, Opportunity, Quote etc)
- Salesforce Service Process (Case, Solutions etc)
- Salesforce Business Process

2. Salesforce Data Model

- Enhancing the Simple App with Data Validation
- Introducing Validation Rules
- Standard Validation Rule
- Custom Validation Rule

3.UI Design & Assignment

- Introducing Page Layouts
- Adding page Layout elements
- Introducing Search Layout
- Lookup Layouts
- Tab Layouts
- Record Type

4.Expanding the App Using Relationships

- Introducing Relationships
- Lookup Relationship
- Master-Detail Relationship
- Roll-up Summary fields
- Hierarchy Relationship
- Many to many relationships

5.User Management

- Introduction Users and User creation
- Setting up features per user record

6.Security and Sharing

- Organization-Wide Defaults
- Profile
- Permission Sets
- Introduction on Roles, Profiles
- Sharing Rules
- Manual Sharing
- Field Level Permissions
- Creating Public Groups and Queues (also, the difference between them)

7.Data Management

- Data Import with Data Loader
- Insert
- Upsert
- Update
- Delete
- Export
- Export All

8.Using Custom Workflow Processes

- Introducing Workflow
- Workflow Actions
- Update Record

- Create Task
- Automate Emails
- OWD

9.Introducing Approvals Process

- Planning for Approval Processes
- Creating an Approval Process
- Creating Approval Steps

10.Analyzing Data with Reports and Dashboards

- Introducing Reports
- Tabular Reports
- Summary Reports
- Matrix Reports
- Joined Reports
- Report Formats
- Introducing Dashboards
- Adding Dashboard Components

11.Data Validation

- Enhancing the Simple App with Data Validation
- Introducing Validation Rules
- Standard Validation Rule
- Custom Validation Rule