Salesforce

Duration: 60 Hours

Basics

• What is Cloud Computing
• Advantages
• Layers – Client, Application (Software as a Service (SaaS)), Platform (platform as a service (PaaS)), Infrastructure (infrastructure as a service" (IaaS)), Server
• Deployment Models – Public cloud Community Cloud, Hybrid Cloud, and Private Cloud

Introduction to Salesforce Admin

• What is Salesforce Admin.com
• Advantages
• Products and Services
• Customer Relationship Management (CRM) – Salesforce Admin CRM and other CRM
• The Sales Cloud
• The Service Cloud
• Force.com Platform
• Chatter
• AppExchange
• Configuration
• Web services
• Mobile support

Introduction to Force.com Platform

• Registering Developer Edition with Salesforce Admin.com
• Standard applications
• Standard Tabs
• Standard Objects and relationships, Links
• Setup page – Personal Setup, Application Setup and Administration Setup

Personal Setup

• Personal Information
• Change Password

- Reset my security Token
- Change My Display
- Grant Login Access
- Calendar Access
- Reminders
- Email Settings

Designing Applications on Force.com – I

- Creating new application
- Creating Custom objects
- Creating Tabs – Custom Tabs, Web tabs
- Adding text, Currency, Checkbox, Date fields
- Creating Picklists • Field Dependencies

Designing Applications on Force.com – II

- Encrypted fields, field help, and field history tracking
- Use master detail, lookup, and many-to-many Relationships
- Custom button and links Creation
- Rollup Summary field

Designing Applications on Force.com – III

- Develop custom formulas
- Use the vlookup, regex, ischanged, isnew, and priorvalue
functions to build business processes
- Validation Rules – Creating rule by applying formulas
- Payelayouts – Payelayout Editor,Grouping fields into New
Section, adding spece between Fields, Editing Field
properties
- Search Layouts

Designing Applications on Force.com – IV

- Workflows o Introducing Workflow Rules and work flow
actions Email Alerts – Email templates Tasks Field
Updates – Queues and Time Dependent Workflow Actions
- Designing Applications on Force.com – V
- Creating an approval Process
- Create an Email template for approvals
- Create an Approval Process

- Create a Custom Profile
- Create User
- Test the Approval Process

Reports
- Introducing Reports and Custom Reports
- Create a tabular Report
- Create a Summary Report – Adding Summary fields and adding Columns and Filters
- Create Matrix Report
- Exporting Reports
- Dashboards – Creating and Editing Dashboards, Adding Dashboard Snap Shots to Home Page, Creating Additional Reports
- Creating Custom Report Types

Sharing and Security data – I

- Creating User Accounts
- Controlling Access to Data
- Controlling Access to Objects
- Introducing Profiles o Standard Profiles o Custom Profiles
- Controlling Access to Fields o Introducing Filed Level Security
- Accessing Field-Level Security Settings

Sharing and Security data – II

- Controlling Access to Records
- Introducing Organization-Wide Defaults
- Introducing Role Hierarchies
- Company Roles and Profiles
- Sharing Rules
- Manual Sharing

Sharing and Security data – III

- Displaying Field values and Page Layouts according to

Profiles –
• Overriding Sharing with Object Level Permissions
• Administration Groups – Managing Groups (Public and Personal)

Sharing and Security data – IV

• Login History
• Password Policies
• User session Settings
• Set Trusted IP range

Administration Setup – Mobile, Desktop and Email administration

• Mobile Administration:
• Configuring Mobile user
• Configuring Mobile user
• User Settings

Desktop Administration

• Configuring for outlook
• Offline Briefcase configuration

Email Administration

• Testing Deliverability
• Deliverability Settings
• Setting Organization-Wide addresses
• Compliance BCC
• Setting Email Footers

Company Profile and Monitoring

• Editing Company Information
• Settings Fiscal Year
• Settings Business Hours and Holis

- Language Settings
- Debug Logs
- Email Log files

Managing data – I

- Importing data to Salesforce Admin.com from external Sources
- Import Custom objects
- Data Export
- Mass Transfer Records
- Mass Delete Records
- Mass Trnasfer Approval
- Mass Update addresses

Managing data – II

- Data Loader
- Data loader Overview
- When to use Data Loader
- Installing and Configuraing dayta Loader
- Use Data Loader to create mapping files and upsert data
- Running Batch Processes
- Command Line Quick start
- Dataloader.io