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Salesforce Admin Training Course Syllabus

- 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 cloudm Community Cloud, Hybrid Cloud, 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 Enail 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 Transfer Approval
- Mass Update addresses

Managing data – II

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

