

# salesforce





# About Course

Salesforce is a revolutionary platform built around customer relationship management. It integrates and connects customers and businesses through specialized practices and techniques that drive sales. This platform is not just limited to marketing. It also extends to the IT sector, e-commerce, and sales. As technological needs see an exponential rise, salesforce proves to be the key to a fast-paced and continually growing business space.

# SALESFORCE ADMINSTRATION

# CURRICULUM

Salesforce.com Introduction

Cloud Computing & its Models.
What is Salesforce.com?
Evolution and Products
Different Editions in Salesforce.com
How to sign up for Developer Edition.

Getting Your Organization Ready for Users

Set up the company profile Configure the user interface Configure search settings Set up Chatter

Security and Data Access

Restrict logins
Determine object access
Set up record access



Manage record access with the role hierarchy Deal with record access exceptions Manage field-level security

# Managing Data

Data Loader v/s Import wizards
Import new records using import wizards
Update existing records with the data loader
Upsert operation, Export, and Export All
Mass transfer records between users
Back up data with a weekly export
Mass delete records

### 5) Automation

Manage Email Administration
Set up workflow rules and Approval Processes
Automate Leads and Cases

# Getting Around the App

Understand the data model and navigation Find answers in Help & Training Rollup summary & Cross object formula.



# Setting Up and Managing Users

Manage user profiles
Create and manage users
Troubleshoot user login issues
Set up Chatter Free and Chatter external users.

## Customization: Fields

Administer standard fields
Create new custom fields
Create selection fields: picklists and lookups
Create Formula Fields
Work with Page Layouts
Work with Record Types and Business Processes
Maintain Data Quality

# Reports and Dashboards

Run and modify reports
Create new reports with the report builder
Filter reports
Summarize Report Data
Bucket Fields in Reports
Print, Export, Scheduling, and Email Reports
Build Dashboards
Adding Dashboards in Home Page

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#### More Administration

**Thenes** Public Groups















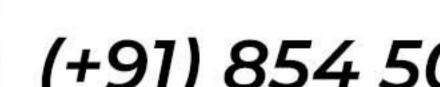


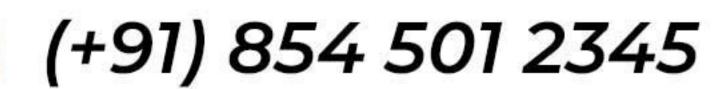






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