



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 ADMINISTRATION

CURRICULUM

① 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.

② Getting Your Organization Ready for Users

Set up the company profile

Configure the user interface

Configure search settings

Set up Chatter

③ 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

④ 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

⑥ Getting Around the App

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

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Setting Up and Managing Users

Manage user profiles

Create and manage users

Troubleshoot user login issues

Set up Chatter Free and Chatter external users.

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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

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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

Queues


Public Groups



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