

Salesforce Administration Syllabus

SalesForce CRM Course Content

Definition Of Cloud Computing And Types

- Definition of cloud computing
- On-demand advantages of Cloud computing
- Services of Cloud computing
- SaaS(Software as a Service)
- PaaS(Platform as a Service)
- IaaS(Infrastructure as a Service)
- Types of Clouds
- Public Cloud
- Private Cloud
- Hybrid Cloud
- Community Cloud

Definition Of Salesforce And It's Products

- Importance of Salesforce
- Importance of CRM and Solutions
- Growth of Revenue using CRM
- comparison of Salesforce CRM with other CRM Products
- Salesforce Products
- Salesforce Features and Edition Limits

Salesforce Administration

Sales Cloud-Generic Business Process

- Features of Sales Cloud
- Products
- Campaign
- Lead
- Account
- Opportunity
- Contact
- Contract
- QuoteManage
- Order
- Forecast
- Entitlement

Service Cloud and Customer Service

- Features of Service cloud
- case
- Solution
- Public Knowledge Base

- Web-to-case
- Self-Service Portal
- Escalation rules

Company Information

- creating Company Profile
- Setting Fiscal Year, Business Hours
- Setting Holidays and Language
- Identifying Edition

Salesforce-Force.Com Platform

- Creating User Login Credentials
- Setup-Personal Setup
- About Administration Setup
- Standard Applications, Tabs and Objects
- Creating Custom Application(Design), Custom Objects and Custom Tabs
- Creating Custom Fields Using DataTypes and Picklist and Dependencies

Manage Users

- Creating users and Roles
- Creating Custom Profiles
- Discussion on Standard Profiles
- Creating Permission Sets and Public Groups and Queues
- Login History

Relationships In Salesforce

- Lookup Relationship
- Master-Detail Relationship
- Many to many Relationships
- Junction Object
- Rollup Summary Fields
- RealTime Scenarios

Applying Validations And Formulas

- Overview of validation
- Creating Validation Rule
- Apply Formula in Validation
- PageLayout on Objects
- Mini PageLayout
- Search Layout
- Record Type
- Field Level Security on Layout

Object Level Security Model (Table)

- Profile Level
- Permission Set Level

Field Level Security Model (Column)

- Profile Level
- Page Layout Security
- Permission Set Security

Record Level Security Model-Sharing Settings(Row)

- Overview of Record Level security
- Organization-Wide-Default
- Sharing Rules
- Grant Access Using Hierarchies
- Internal Access
- External Access
- Manual Sharing
- Owner Based Sharing Rule
- Both Usage of Profile and OWD
- RealTime Scenarios

Workflows And Approvals

- Overview of Workflows
- Email Alerts
- Tasks
- Field Updates
- Outbound Messages
- Time Dependent Workflow Actions
- Order of Execution
- Approval Process Definition
- Dynamic Approval Process
- Multi-Step Approval Process
- Parallel Approval Process
- Approval Process Actions
- Real Time Scenarios

Data Management With SFDC

- Overview Import wizard
- Limitations on Import Wizard
- Data Export
- Import Objects
- .CSV File usage in salesfore
- Import Data into Salesforce
- Data Loader
- Mass Transfer Records and Delete of Records

Process Builder

- Overview of Process Builder
- Working with Process Builder
- Workflows With Process Builder

Community Creation

- Customer community
- Partner Community
- Creating User On Community
- Self Registration

Security Settings

- Single-Sign-on settings
- Session Settings
- Password Policies
- Identity Provides
- Login Access
- Identity Connect
- Email Admin Setup

Email Administration

- Deliverability
- Test Deliverability
- Organization-Wide Addresses
- Setting Email Footers
- Compliance BCC Email

Administrative Integration

- Overview on Declarative(no-code) and Programmatic (coding)
- Integrating SFDC to SFDC, SFDC to Excel and SFDC to Facebook

Reports And Dashboards

- Importance of Reports
- Discussion On Standard Report
- Creating Custom Report, Tabular Report, Summary report, Matrix Report
- Creating Joined Report and Report Types
- Applying Filters on Report
- Run Report
- Export Report
- create Dashboard
- Fetching Dashboard in to Visualforce

Resolving Project Issues

- Overview on Types of Projects
- Issue Capturing and Priority
- Issue Resolving and escalation
- How RealTime Issues
- Overview on Outlook Email
- Code Checking
- BluePrint
- Agile Methodology
- How to Clear RoadBlocks
- Office Communicator(O.C)

