

Salesforce Administration and App Builder

Duration: 30 hrs

1. Introduction to Cloud Computing and Salesforce Platform

- a) Explain Cloud Computing
- b) Define SAAS, PAAS, IAAS – Service Model
- c) Explain Public, Private and Hybrid Cloud
- d) CRM Overview
- e) Force.com Platform Overview

2. Blocks in Salesforce Platform

- a) Explain Company Profile and License Types
- b) List Types of Sandboxes

3. Users

- a) Creation of Users
- b) Deactivation of Users

4. Salesforce Data Model, Objects and Fields

- a) Standard Objects
- b) Custom Objects
- c) Standard Fields
- d) Custom Fields
- e) Different Field Data Types

5. Relationships

- a) Master Detail Relationship
- b) Lookup Relationship
- c) Junction Object
- d) Self – Relationship
- e) Hierarchical Relationship
- f) Many to Many Relationship
- g) Roll-up Summary
- h) Field History

6. Salesforce Security Model and its Features

- a) Profiles
- b) Permission Sets

- c) Organization Wide Default
- d) Role Hierarchy
- e) Criteria Based Sharing
- f) Manual Sharing
- g) Public Groups and Queues

7. Formulas and Validation Rules

- a) Improper Data Check
- b) Conditionally Required Fields
- c) Data Consistency
- d) Data Format Check (Using REGEX function)
- e) Using VLOOKUP function

8. Sales Cloud

- a) Understand Sales Processes in any Organization
- b) Identify Various Sales Productivity Features
- c) Design and Implement Lead Management
- d) Analyze Process of Campaign Management
- e) Define Characteristics of Products and Price Books

9. Service Cloud

- a) Analyze Case Management
- b) Implementing Automation in Case Management
- c) Understand the Basic Capabilities of Communities
- d) Identify the Capabilities of Salesforce Knowledge

10. Data Handling and Processing in Salesforce

- a) Identify the Considerations for Data Processing
- b) Analyze tools and Use Cases for Managing Data
- c) Difference Between Import Wizard and Data Loader
- d) Bulk Upload of Data
- e) Different Data Loader Options

11. Reports and Dashboards

- a) Creating a Report
- b) Customizing a Report
- c) Identifying the Impacts of Sharing Model on Reports
- d) Creating and Modifying Dashboards
- e) Analyzing the Capabilities of Custom Report Types

12. Chatter, Global Action and Publisher Layout

- a) Identify Features of Chatter
- b) Understand Global Publisher Layout and Global Actions
- c) Implement Object Specific Actions

13. Salesforce Mobile

- a) Explain Benefits of Salesforce 1
- b) Identify Components of Salesforce 1 Mobile
- c) Explain Importance of Salesforce A
- d) Analyze Features of Salesforce A

14. Deployment Process

- a) Know Steps in Deployment
- b) Explain Types of Change Sets
- c) Understand Deployment Settings

15. Salesforce Project Application Lifecycle

- a) Know Milestones in Application Lifecycle
- b) Work on Sandbox
- c) Understand Benefits of Unmanaged Packages

16. Buttons and Link Management in Salesforce

- a) Learn Adding Custom Buttons
- b) Working on Custom Links
- c) Know Benefits of Actions

17. Flows and Approvals

- a) Introduction of Flows
- b) Various Stages in Flows
- c) Implement the Approval Process
- d) Approval Process Actions