Salesforce Admin Course Content

Course Description:

Salesforce is a cloud-based CRM solution that provides service and enterprise application suite which offers data analytics, customer service, marketing automation, and app development. Salesforce CRM is a leading tool over the cloud platform. Salesforce CRM software helps in data analyzing and managing customers, clients and sales details in the business and marketing field. Salesforce Admin who works in the business market with stakeholders needs to find the existence of any drawbacks, giving the best solutions with the required processes and improving the functionality of the organization.

As the demand for salesforce is high in many companies at the global level, job opportunities for salesforce professionals are also huge in IT job market. The average salary of a Salesforce admin is $89,011 per year in the United States - indeed.com.

Salesforce Admin online training course is also for beginners who have no prior experience in the Salesforce domain. The course is well structured by industry experts with all concepts from scratch to prepare you for the salesforce admin certification exam. Beginners can easily learn the course and gain practical knowledge through practical sessions, assignments and real-time projects. Professionals who have some experience in salesforce may enhance technical skills by the advanced concepts included in the course. The Salesforce admin online course empowers you to configure, implement, and manage sales and services using Salesforce CRM on the cloud platform.

Course Content:

Introduction to CRM
- Why CRM?
- Introduction to Cloud Computing & Salesforce.com
- Cloud Computing - Overview
- What is Software-as-a-Service (SAAS)?
- What is Platform-as-a-Service (PAAS)?
- What is Infrastructure-as-a-Service (IAAS)?

Types of Tab
- Standard Objects – Account, Contacts, Leads, Campaigns, Opportunities etc.
- Custom object Tabs
- Web Tabs
- Visual force Tabs

Custom Application
- Limitations
- Field Creation and its Relationships a. Different Data types

Standard Data types
- Text, Email, Number, Currency, URL, Text Area

- Storage Limitations

Read-only Data types
- Auto Number, Formula and Rollup summary
- Rollup summary Operations
- Sum(), Min(), Max() and Count

Relational Data types
- Lookup vs. Master - Detail Relationship
- Limitations
- Required, External Id, Default Value and Unique fields

Salesforce Application elements
- Home Page, Tabs, Tab Home Pages, Detail Page, Side Bar, Apps, Record

Page Layouts
- Defining Page layouts
- Field order changes
- Adding custom buttons and links
- Defining required and read only fields
- Adding related list

Record Types
- To create and maintain record types for your organization
- Display different page layouts and picklist values based on record types
- Uses of Record Types

Field Dependencies
- Controlling field/Dependent field
- Making dependent pick list fields

Validation Rules
- Defining Salesforce Data Validation
- Creating Custom Validation Rules
- Validation vs. Trigger

Workflow rules
- Set up workflow actions

Workflow Approval process
- Plan approvals using workflow
- Use the approval wizard – standard vs. jump start
- Create workflow approvals

Email Templates
- Email Templates – Sending Single emails and Mass emails
- Types of Templates - HTML (Using Letter Head) , Custom HTML (without using letter head), Visual force Email Templates

Personal Setup
- Managing Personal Information
- Password Reset
- User Management Overview
- Roles, Users, Profiles & Sharing

Users, Roles and Profiles
- Creating Users
- User Licenses Overview
- Understanding Record Ownership and Access
- Role Hierarchy
- Profiles
- Overview and different profiles
- User Permissions

Security
- Managing the Users
- Set Organization Wide Defaults (OWD)
- Object-level Security
- Field-level Security
- Record-level Security
- Sharing Rules

Reports & Dashboards
- AppExchange
- Installing an App
- Uninstalling an Apps

Namespace
- Creating Namespace for your organization