



## **Salesforce CRM /Admin Course Content:35-40hours**

### Course Outline

#### **Security Confirmation**

- Activate your computer for Salesforce.com CRM

#### **Navigation**

- Set up Admin options & User Interface

#### **Organization Administration of Salesforce.com CRM**

- Set your organization's language & locale
- How to Manage organization's currency

#### **Customization in Salesforce.com CRM**

- How to Create custom profiles & custom fields
- How to Define dependent picklists
- How to Customize lookup fields & formula fields
- How to Customize page layouts
- Customize standard related lists
- Learn about record types & business processes
- Use field-level security

#### **Security & Access in Salesforce.com CRM**

- How to Create & manage your users
- How to Set organization-wide defaults
- Learn about record access
- How to Create the role hierarchy
- Learn about role transfer & mass transfer functionality
- Learn about the Sharing model
- Manually share records
- Set up opportunity team selling & account teams
- Learn about folder access

#### **Workflow in in Salesforce.com CRM**

- How to Define workflow



- How to Set up workflow rules
- How to Set up workflow tasks & alerts

### **Workflow Approvals**

- Plan approvals using workflow
- How to use the approval wizard – standard vs. jump start
- Create workflow approvals

### **Data Validation in Salesforce.com CRM**

- Learn about Salesforce CRM data validation
- Create data validation rules
- Learn about custom field unique and duplicate properties
- Execute an initial import
- Update via the import wizard

### **Data Utilities for Import and manage data**

- Importing overview
- Learn about import solutions & custom object records using the data loader
- How to use mass delete
- Initiate weekly export
- How to use storage

### **Analytics & Reports in Salesforce.com CRM**

- Create custom reports
- How to use advanced filters
- How to use conditional highlighting
- How to use custom summary formulas
- How to use dashboards

### **Marketing Administration**

- Terminology overview
- Use the Integrated Campaign Builder
- Learn about lead assignment setup
- Learn Web-to-lead & auto-response rules

### **Service & Support Administration**

- Learn about case escalation
- Identify solution categories, & suggested solutions
- How to set up the self-service portal
- Mass manage self-service portal users

### **Administration Console**

- Navigate the Administration Console

- How to create a Administration Console

### **Extending Salesforce CRM**

- What are custom objects
- Learn about custom tabs
- Learn about custom Web tabs
- Build a custom app

### **The AppExchange**

- What is the AppExchange
- How to install an app
- How to delete an app

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