

## Salesforce.com Administrator Course Details

#### By Besant Technologies

Course Name	Salesforce.com Administrator
Category	Cloud Computing
Venue	Besant Technologies
Address	No.24, Nagendra Nagar, Velachery Main Road, Velachery, Chennai – 600 042 Landmark – Opposite to Phoenix Market City
Official URL	Salesforse.com Administrator Training
Demo Classes	At Your Convenienœ
Training Methodology	30% Theory & 70% Practical
Course Duration	35-40 Hours
Class Availability	Weekdays & Weekends
For Demo Class	Call - +91-996 252 8293 / 94 Email ID — <u>besanttech@gmail.com</u>

# Why Besant Technologies?

- Training by highly experienced and certified professionals
- No slideshow (PPT) training, fully Hand-on training
- Interactive session with interview QA's
- Real-time projects scenarios & Certification Help
- Most competitive & affordable course fees
- Placement support for all courses
- List of established & satisfied clients & students (Visit our website for reviews).



## Salesforce.com Administrator Training Outline

#### Introduction

- Introduction to Cloud Computing
  - What is Cloud Computing
  - Advantages
  - Layers Client, Application(Software as a Service (SaaS)), Platform (platform as a service (PaaS)), InfraStructure(infrastructure as a service" (IaaS)), Server
  - Deployment Models Public cloudm Community Cloud, Hybrid Cloud, Private Cloud
- Introduction to SalesForce
  - What is salesforce.com
  - Advantages
  - Products and Services
    - Customer Relationship Management(CRM) Salesforce CRM and other CRM
    - The Sales Cloud
    - The Service Cloud
    - Force.com Platform
    - Chatter
    - AppExchange
    - Configuration
    - Web services
    - Mobile support

#### Introduction to Force.com Platform

- Registering Developer Edition with Salesforce.com
- Standard applications
- Standard Tabs
- Standard Objects and relationships, Links/li>
- Setup page Personal Setup, Application Setup and Administration Setup

#### **Personal Setup**

- Personal Information
- Change Password
- Reset my security Token
- Change My Display
- Grant Login Access
- Calendar Access
- Reminders
- Email Settings



## Designing Applications on Force.com - I

- Creating new application
- Creating Custom objects
- Creating Tabs Custom Tabs, Web tabs
- Adding text ,Currency,Checkbox,Date fields
- Creating Picklists
- Field Dependencies

#### Designing Applications on Force.com - II

- Encrypted fields, field help, and field history tracking
- Use master detail, lookup, and many-to-many Relationships
- Custom button and links Creation
- Rollup Summary field

## Designing Applications on Force.com - III

- Develop custom formulas .
  - Use the vlookup, regex, ischanged, isnew, and priorvalue functions to build business processes
- Validation Rules Creating rule by applying formulas
- Payelayouts Payelayout Editor, Grouping fields into New Section, adding spece between Fields, Editing Field properties
- Search Layouts

## Designing Applications on Force.com - IV

- Workflows
  - Introducing Workflow Rules and work flow actions
    - Email Alerts Email templates
    - Tasks
    - Field Updates Queues and Time Dependent Workflow Actions

## Designing Applications on Force.com – V

- Creating an approval Process
  - Create an Email template for approvals
  - Create an Approval Process
  - Create a Custom Profile
  - o Create User
  - Test the Approval Process

#### **Reports**

- Introducing Reports and Custom Reports
- Create a tabular Report
- Create a Summary Report Adding Summary fields and adding Columns and Filters
- Create Matrix Report



- Exporting Reports
- Dashboards Creating and Editing Dashboards, Adding Dashboard SnapShots to Home Page, Creating Additional Reports
- Creating Custom Report Types

#### Sharing and Security data - I

- Creating User Accounts
- Controlling Access to Data
- Controlling Access to Objects
  - Introducing Profiles
  - Standard Profiles
  - Custom Profiles
- Controlling Access to Fields
  - o Introducing Filed Level Security
  - Accessing Field-Level Security Settings

#### Sharing and Security data - II

- Controlling Access to Records
  - o Introducing Organization-Wide Defaults
  - Introducing Role Hierarchies
  - o Company Roles and Profiles
  - Sharing Rules
  - Manual Sharing

#### Sharing and Security data - III

- Displaying Field values and Page Layouts according to Profiles –
- Overriding Sharing with Object Level Permissions
- Administration Groups Managing Groups (Public and Personal)

#### Sharing and Security data - IV

- Login History
- Password Policies
- User session Settings
- Set Trusted Ip range

### Administration Setup – Mobile, Desktop and Email administration

- Mobile Administration:
  - Configuring Mobile user
  - User Settings
- Desktop Administration:
  - Configuring for outlook
  - Offline Briefcase configuration
- Email Administration
  - Testing Deliverability



- o Deliverability Settings
- Setting Organization-Wide addresses
- o Compliance BCC
- Setting Enail Footers
- Company Profile and Monitoring
  - o Editing Company Information
  - Settings Fiscal Year
  - Settings Business Hours and Holis
  - Language Settings
  - Debug Logs
  - o Email Log files

#### Managing data - I

- Importing data to Salesforce.com from external Sources
- Import Custom objects
- Data Export
- Mass Transfer Records
- Mass Delete Records
- Mass Trnasfer Approval
- Mass Update addresses

## Managing data - II

- Data Loader
  - Data loader Overview
  - When to use Data Loader
  - o Installing and Configuraing dayta Loader
  - Use Data Loader to create mapping files and upsert data
  - Running Batch Processes
  - Command Line Quick start
- Dataloader.io