

Introduction to Salesforce Administration & Configuration

Course Overview

This is a 5-day class

This class will help students prepare for both the Salesforce Certified Administrator exam and the Salesforce Certified Developer exam. Also learn how to administer Salesforce, configure Salesforce and develop new applications with the Force.com platform.

Who Should Attend

People with a strong technical background, such as system administrators, developers or consultants, who have experience with another CRM or ERP system and are looking to quickly develop equivalent skills on Salesforce.

Course Outline

1 Lesson One

- Introduction to GenWatt
- Setting up a practice site
- Salesforce.com overview
- Organization settings
- System security
- Force.com architecture and model, view, controller
- Apex and Visualforce overview
- Record security

2 Lesson Two

- Folder access
- Customization
- Field-level security
- Security and sharing knowledge check
- Customization
- Products and price books
- Quotes
- Sales productivity tools
- Field history

3 Lesson Three

- Service relationships
- Case assignment rules
- Escalation rules
- Community relationships
- Object relationships
- Lookup and Master Detail fields
- Schema Builder
- Rollup Summary fields
- Lookup Field filters
- Recruiting application
- Setup audit trail

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4 Lesson Four

- Automation
- Debugging
- Data validation
- Workflow
- Approval processes
- User interface settings
- Search settings
- Salesforce record IDs
- Import wizards
- Data loader
- Mass transfer
- External IDs
- Upsert
- Mass delete
- Weekly data export
- List views
- Reports

5 Lesson Five

- Reports (Cont.)
- Dashboards
- Knowledge Check
- Marketing relationships
- Leads
- Campaigns
- Content
- Partner portal
- Force.com sites
- Administrator exam prep
- Developer exam prep
- Supplemental materials
- Session wrap-up