

salesforce™

Administration & Customization Essentials

AFCKS Advantage



What is SFDC?

SFDC stands for Salesforce.Com. Officially launched in 1999 by Mark Benioff, SFDC is now the number One on demand CRM in the market. It is based on force.com platform, which makes it easier to manage, customize & develop the function.

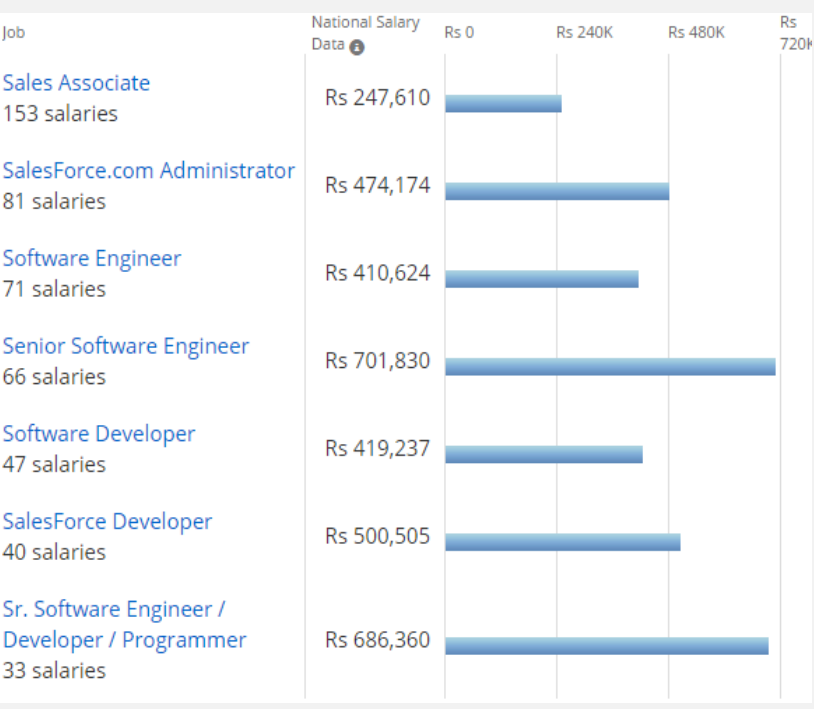
The most important benefit of all is 'SFDC is based on the cloud technology & can be access & used on any platform, operating system or device. No installation of any kind is required.

Job Prospect In India

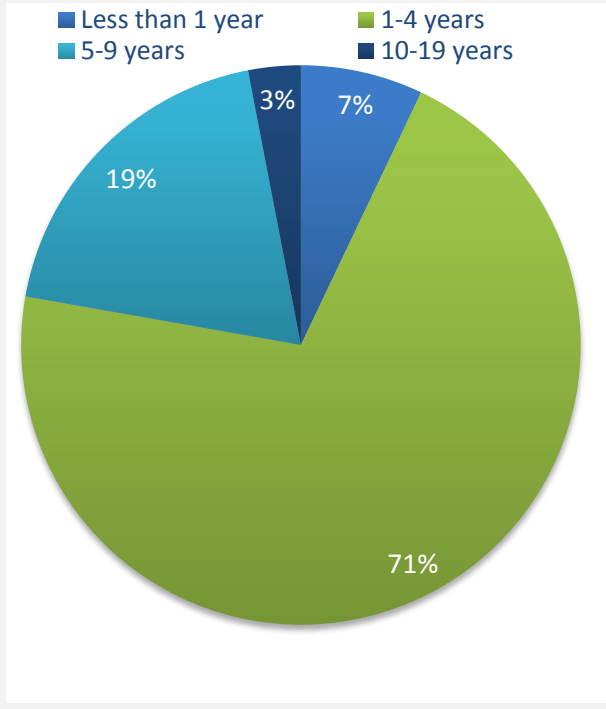
Learning SFDC will not only help you perform your day to day activities more efficiently but will also open up multiple new avenues. Average salary from a person with SFDC skill can range from 400k to 900K. Below are few interesting facts and figures.

It is a latest technology & you will find most of the job are takes by people with 1 to 4 years of experience.

Average Salary By Job Title



Employment By Experience (%)



*Source: payscale.com

Who Should Attend

The course is ideal for everyone who have passion to learn something new. It will help you even if you do not have any prior knowledge or experience. Attendees can be from but are not limited to one of below domains/Job Profiles

- Sales
- Sales Operation
- Finance
- Business Analytics
- Data Analytics
- Data Insights
- Reporting & Insights
- MIS
- Channel supports
- Business Admin
- Anyone who want to pursue a career in Salesforce.Com Domain

Objective

The course is designed to help an individual to learn Salesforce.com from the beginning. The curriculum is designed to help you with practical day to day use at your job or workplace. After attending this course you will be able to understand:

- Cloud Company
- CRM
- SFDC CRM Platform
- SFDC Objects
- SFDC Customization
- Data Management
- Data Quality
- SFDC Administration
- SFDC Mobile App
- SFDC Development

Duration

Course duration will be 36 to 45 hours

Curriculum

Understand Cloud Computing

Learning Objective: - This module will enable you to understand:

- A Brief History of Computing
- What is cloud computing
- Understanding SAAS
- Understanding PAAS

Introduction To SFDC

Learning Objective: - This module will enable you to understand:

- What is SFDC
- History of SFDC
- SFDC market share
- Benefit of SFDC Platform
- Understanding SFDC Products and Editions
- Type of Sandbox & Their Features

Getting Started With SFDC CRM Platform

Learning Objective: - This module will enable you to understand:

- Create your own SFDC login
- Understanding Key feature of SFDC license
- Hands on Platform
- Understanding the uses of Platform
- General Navigation
- Understanding Salesforce Architecture
- Understanding Objects
- Understanding Search Options
- Brief intro to tabs
- Understanding UI
- Understanding APPs
- Brief Into Settings and Security

Curriculum

Objects

Learning Objective: - This module will enable you to understand:

- Types of objects
- Difference between custom and standard object
- Relationship between objects
- User case scenarios for objects

Accounts

Learning Objective: - This module will enable you to understand:

- Introduction to Accounts
- Understanding real life uses
- Relationship other objects

Contacts

Learning Objective: - This module will enable you to understand:

- Introduction to Contacts
- Understanding real life uses
- Relationship other objects

Leads

Learning Objective: - This module will enable you to understand:

- Introduction to Leads
- Understanding real life uses
- Relationship other objects
- Converting a leads to an opportunity, account & contact

Opportunities

Learning Objective: - This module will enable you to understand:

- Introduction to Opportunities
- Understanding real life uses
- Relationship other objects

Curriculum

Other standard Objects

Learning Objective: - This module will enable you to understand:

- Tasks
- Chatter
- Contents
- Products
- Cases
- Products
- Order
- Price Books
- People
- Contracts

Data Management

Learning Objective: - This module will enable you to understand:

- Data Processing & handling Overview
- Record Id's & Its Important
- Type of record ID & its uses

SFDC Fields

Learning Objective: - This module will enable you to understand:

- Understanding fields structure
- Exploring fields custom names
- Using fields custom names

SFDC UI

Learning Objective: - This module will enable you to understand:

- Customizing UI as end user
- Customizing Home Screen
- Customizing Object Homes
- Customizing Ques

Curriculum

Customization

Learning Objective: - This module will enable you to understand:

- Customizing Page Views
- Customizing Apps
- Customizing Objects

Development

Learning Objective: - This module will enable you to understand:

- Creating Formula Fields
- Creating Objects
- Creating Fields
- Creating Apps
- Create Master Detail Relationship
- Create a Lookup Relationship
- Create a Many-to-Many Relationship
- Create Lookup Filters
- Creating Apex Pages

Business Logic Development

Learning Objective: - This module will enable you to understand:

- Understanding Business Logic
- Building a Custom App
- Understanding When to Use What
- Record Type
- Page Designing
- Enforce Data Validation
- Object Relationship Creation
- Object Relationship Management
- Deleting un required objects
- Using Schema Builders
- Limitation of Click to an Develop

Curriculum

Process Automation

Learning Objective: - This module will enable you to understand:

- When to Use Automation
- Creating Workflows
- Creating Automation Rules
- Understanding to Approval Process
- Understand Process Builder

Mass Data Management

Learning Objective: - This module will enable you to understand:

- Upload
- Modify
- Delete
- Import
- Export

Using Apex Dataloader

Learning Objective: - This module will enable you to understand:

- Using Apex Dataloader to Upload, Modify, Delete Data
- Export Data using SOQL
- Saving & Reusing Mapping Schema

Data Quality

Learning Objective: - This module will enable you to understand:

- Getting Started With Data Quality
- Accessing Current Data Quality
- Improving Data Quality
- Maintaining Data Quality
- Tools Used For Data Quality
- Measurements For Data Quality

Curriculum

SFDC Administration 1

Learning Objective: - This module will enable you to understand:

- SFDC Security Model
- Org Level Administration
- Permission Set
- Rules
- Profiles
- Object Level Security
- Difference Between Profile & Permission

SFDC Administration 2

Learning Objective: - This module will enable you to understand:

- Role
- Role Hierarchy
- Object Level Security
- Record Level Security
- Criteria Based Sharing
- Manual Sharing
- OWD

Reporting & Dashboard

Learning Objective: - This module will enable you to understand:

- Creating Report
- Type of Reports
- Using Formulas in Report
- Creating Custom Fields
- Using Filters
- Using Filter Logics
- Creating Dashboard
- Creating Deep Dive Views
- Scheduling Auto Publish
- Execute Existing Reports

Curriculum

SalesForce 1 App

Learning Objective: - This module will enable you to understand:

- Customizing Mobile App
- Creating Compact Menu For App
- Customizing Navigation & UI
- Quick Action Setup
- Object Specific Action

Chatter Basics

Learning Objective: - This module will enable you to understand:

- Getting Started With Chatter
- Feed Tracking
- Type of Post
- Approving Records
- Rollout Strategy
- Follow Records
- Follow Feeds
- Follow People
- Groups
- Group Administration