PALIUM SKILLS™

SALESFORCE (ADMIN & DEV) Course Details

TRACK I :

Duration is 30 hours

1. **Identity Confirmation**

1.1 Activate your computer
1.2 Setting Up the User Interface
1.3 Set up the UI & search options
1.4 Organization Administration
1.5 Set your organization's language & locale
1.6 Manage currency
1.7 Customisation
1.8 Create custom profiles & custom fields
1.9 Define dependent picklists
1.10 Customize lookup fields & formula fields
1.11 Customize page layouts
1.12 Customize standard related lists
1.13 Learn about record types & business processes
1.14 Use field-level security
1.15 Security & Access
1.16 Create & manage your users
1.17 Set organization-wide defaults
1.18 Learn about record access
1.19 Create the role hierarchy
1.20 Learn about the sharing model
1.21 Manually share records
1.22 Set up opportunity team selling & account teams
1.23 Learn about folder access
1.24 Workflow
1.25 Define workflow
1.26 Set up workflow rules
1.27 Set up workflow tasks & alerts
1.28 Workflow Approvals
1.29 Plan approvals using workflow
1.30 Use the approval wizard – standard vs. jump-start
1.31 Create workflow approvals
1.32 Data Validation
1.33 Learn about Salesforce CRM data validation
1.34 Create data validation rules
1.35 Learn about custom fields & unique properties Data Utilities
1.36 Import records using the import wizards
1.37 Use mass delete
1.38 Use mass transfer
1.39 Learn about storage utilization
1.40 Analytics
1.41 Create custom reports
1.42 Use advanced filters
1.43 Use conditional highlighting
1.44 Use custom summary formulas
1.45 Create dashboards
1.46 The AppExchange
1.47 Learn about the AppExchange
1.48 Install an app
1.49 Uninstall an app
1.50 Marketing Administration
1.51 Use the integrated campaign builder
1.52 Learn about lead queue & lead assignment setup
1.53 Learn Web-to-lead & auto-response rules
1.54 Service & Support Administration
1.55 Learn about cases & solutions
1.56 Set up case escalation rules
1.57 Identify solution categories & suggested solutions Salesforce Console
1.58 Navigate the Salesforce Console
1.59 Create a Salesforce Console
1.60 Extending Salesforce CRM
1.61 Learn about custom objects
1.62 Learn about custom tabs
1.63 Learn about custom Web tabs
1.64 Build a custom app

TRACK II :Objective

Duration is 30 hours

2. Designing Applications on Force.com
2.1 Learn about factors to consider when building a data model
2.2 Develop custom objects and fields, encrypted fields, field help, and field history tracking
2.3 Use master detail, lookup, and many-to-many relationships
2.4 Create a user interface for custom applications using the Custom Object tab, Page Layout, and
2.5 Customization options
2.6 Set field attributes on the page layout
2.7 Use the Custom Object queue and event-based workflow rules with field update actions
2.8 Develop custom formulas and validation rules
2.9 Designing Applications for Multiple Users
2.10 Learn about factors to consider when designing applications for multiple users
2.11 Create profiles, understand what a profile controls (including data access), and customize profiles to manage the user experience
2.12 Customize the user experience with record types and page layouts
2.13 Control access to records
2.14 Employ OWD, sharing rules and levels, roles, public groups, and manual share
2.15 Apply profiles, OWDs, role hierarchy, and sharing to restrict access to sensitive data
2.16 Apply OWDs, public groups, and manual sharing to create conditional access to data
2.17 Analyze suitability of FLS, page layouts, and record types to satisfy business requirements
2.18 Implementing Business Processes
2.19 Use the vlookup, regex, ischanged, isnew, priorvalue functions to build business processes
2.20 Use validation rules to enforce conditional required behaviour
2.21 Use functions to enforce data format and data consistency
2.22 Implement multistep approval workflows /escalations to automate business processes
2.23 Create parallel approval workflows and approvals with dynamic approval routing
2.24 Use outbound messages as part of an approval workflow
2.25 Establish approval workflow criteria with crossobject formulas
2.26 Set up field history tracking to audit processes
2.27 Learn techniques to prevent or record data changes

3. Managing Data
3.1 Learn when and how to use upsert
3.2 Use data management tools and the capabilities of API-based tools
3.3 Configure the Data Loader via command line
3.4 Encrypt passwords using encrypt.bat
3.5 Use the Data Loader to create mapping files and to upsert data

4. Visualforce Pages
4.1 Learn about the capabilities of the Visualforce framework
4.2 Incorporate Visualforce pages into Salesforce Construct expression bindings and incorporate
4.3 Salesforce into Visualforce pages with Visualforce tags
4.4 Use Visualforce tags to create page layouts,input forms, output tables, custom components;
4.5 Create partial page refreshes on JavaScript events
4.6 Learn about the functionality that comes with Visualforce standard controllers
4.7 Find out when Apex is required for creating custom controllers or extensions