

SALES FORCE BASIC ADMIN

Organization Setup

- Learn the components of the company profile
 - Fiscal year
 - Business hours
 - Currency management
 - Default settings
 - Company information

User Setup

- Learn the steps to set up and/or maintain a user
 - Assign licenses
 - Reset passwords
 - Resolve locked user accounts
- Troubleshoot common user access and visibility issues

Global User Interface

- Learn the various UI features that an administrator controls, including the implications
 - UI settings
 - Search settings
 - List views
 - Home page layouts

Security and Access

- Learn the various organization security options
 - Passwords
 - IP restrictions
 - Identity confirmation
 - Network settings
- Learn the features and capabilities of the Salesforce sharing model
 - Record ownership
 - Organization-wide defaults
 - Roles and the role hierarchy
 - Manual sharing
 - Sharing rules and public groups
- Apply the appropriate security controls
 - Organization-wide defaults
 - Roles and the role hierarchy
 - Manual sharing
 - Sharing rules and public groups
- Learn the various settings and permissions a profile controls
 - IP access
 - Login hours
 - Record types
 - Access to tabs
 - Permissions
 - Object permissions
 - Field-level security
- Learn the appropriate use of a custom profile

Standard and Custom Objects

- Learn the standard object architecture and relationship model
- Learn how to create, delete, and customize fields, page layouts, and list views for custom and standard objects
- Given a scenario, determine the appropriate fields and page layouts for custom and standard objects.
- Learn how to create, delete, and customize record types for custom and standard objects.
- Given a scenario, determine the appropriate record types and business processes for custom and standard objects

- Learn the implications of deleting fields
- Learn when to use and how to create formula fields

Sales and Marketing Applications

- Learn the capabilities and implications of the sales process
- Learn when to apply the appropriate sales productivity features
 - Big deal alerts
 - Update reminders
 - Similar opportunities
 - Competitors
 - Team selling
- Learn the capabilities of products and price books
- Learn the capabilities of lead management
 - Lead conversions
 - Lead source
 - Lead field mapping
- Learn how to automate lead management
 - Queues
 - Assignment rules
 - Web-to-lead
 - Auto-response
- Learn the capabilities of campaign management
 - Hierarchies
 - Influences
 - Campaign members

Service and Support Applications

- Learn the capabilities of case management
 - Case processes
 - Case settings
 - Case comments
- Learn how to automate case management
 - Case assignment
 - Auto-response
 - Escalation
 - Web-to-case
 - Email-to-case
 - Case teams
- Learn the capabilities of solution management
 - Settings
 - Categories
 - Processes
- Learn the basic capabilities of portals
- Learn the capabilities of the Community application
 - Ideas
 - Answers
- Learn the capabilities of Salesforce Knowledge



Activity Management

- Learn the capabilities of activity management
 - Manage tasks
 - Events
 - Public calendars
 - Multi-day events
 - Cloud scheduler

Chatter

- Learn the features of Chatter
 - Feed
 - Groups
 - Following
 - Security

Data Management

- Learn the considerations when importing, updating, transferring, and mass deleting data
 - CSV files
 - Field matching
 - Matching types
 - Record ids
 - External ids
 - Duplicate records
- Learn the tools and use cases for managing data
 - Dataloader
 - Data import wizard
- Learn the capabilities and implications of the data validation tools
- Learn the different ways to back up data
 - Weekly data export service
 - Exports
 - Dataloader

Content and Folder Management

- Learn the capabilities of Salesforce Content
 - Presentation assembly
 - Content delivery
 - Content packs
 - Workspaces
 - Tags
- Learn how folders can be used to organize and secure communication templates, dashboards, reports, and documents

Analytics, Reports and Dashboards

- Learn the options available when creating or customizing a report
 - Report type
 - Report format
 - Fields
 - Summarizing data
 - Filtering data
 - Charting
 - Scheduling
 - Conditional highlighting
- Learn the impact of the sharing model on reports
- Learn the options available when creating and modifying dashboards
 - Dashboard components
 - Data sources
 - Chart types
 - Scheduling
 - Running user
- Learn the capabilities of custom report types



Workflow Automation

- Learn when workflow are evaluated
- Learn the capabilities of workflow rules and actions
- Learn the appropriate workflow solution
- Learn the capabilities and use cases for the approval process

Desktop and Mobile Administration

- Learn the capabilities of Salesforce Mobile
- Learn the installation and synchronization options of Salesforce for Outlook

AppExchange

- Learn use cases for AppExchange applications