

Introduction to Salesforce & CRM

Cloud Computing Terminologies Sign
up to Salesforce Account

ORGANIZATION SETUP

- Describe the information found in the company information (e.g., fiscal year, business hours, currency management, default settings).
- Distinguish between the various UI features that an administrator controls, including the implications (e.g., UI settings, search settings, list views, home page layouts).
- **USER SETUP**
- Identify the steps to set up and/or maintain a user (e.g., assign licenses, reset passwords, and resolve locked user accounts).
- Understand the implications of activating, deactivating, or freezing a user.
- **SECURITY AND ACCESS**
- Explain the various organization security controls (e.g., passwords, IP restrictions, identity confirmation, network settings).
- Given a user request scenario, apply the appropriate security controls based on the features and capabilities of the Salesforce sharing model (e.g., organization-wide defaults, roles and the role hierarchy, manual sharing, sharing rules and public groups).
- Given a scenario, determine the appropriate use of a custom profile or permission set using the various profile settings and permissions.
- Describe how folders can be used to organize and secure communication templates, dashboards, and reports.

STANDARD AND CUSTOM OBJECTS

- Describe the standard object architecture and relationship model.
- Explain how to create, delete, and customize fields and page layouts on standard and custom objects, and understand the implications of deleting fields.
- Given a scenario, determine how to create and assign page layouts, record types and business processes for custom and standard objects.

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SALES APPLICATIONS

- Given a scenario, identify the capabilities and implications of the Sales Process
- Given a scenario, identify the appropriate sales productivity features using opportunity tools and know when products and Price Books should be used
- Describe the capabilities of lead automation tools and campaign management
- Describe the capability of Salesforce Content.

SERVICE AND SUPPORT APPLICATIONS

- Describe the capabilities of case management (e.g., case processes, casesettings, and case comments).
- Given a scenario, identify how to automate case management (e.g., caseassignment, auto-response, escalation, web-to-case, email-to-case, case teams).
- Describe the capabilities of solution management and Salesforce Knowledge.
- Describe the capabilities of the Community application (e.g. Ideas,Answers).

DATA MANAGEMENT

- Describe the considerations when importing, updating, transferring, andmass deleting data (e.g., CSV files, data quality, field mapping, record IDs, external IDs, duplicate records).
- Given a scenario, identify tools and use cases for managing data (e.g.,dataloader, data import wizard).

ANALYTICS - REPORTS AND DASHBOARDS

- Describe the options available when creating or customizing a report(e.g., report type, report format, fields, summarizing data, filtering data, charting, scheduling, and conditional highlighting).
- Describe the impact of the sharing model on reports.
- Describe the options available when creating and modifying dashboards(e.g., dashboard components, data sources, chart types, scheduling, and running user).
- Describe the capabilities of custom report types.

WORKFLOW/PROCESS AUTOMATION

- Given a scenario, identify the appropriate automation solution based onthe capabilities of workflow/process.
- Describe capabilities and use cases for the approval process.

APPLICATION LIFECYCLE

Sandbox and Sandbox Types

Deployment mechanisms - Change Set , Ant overview , Wokbench, SFDX(Visual Studio Code)

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