

SALESFORCE

BEGINNER

3 DAYS

Salesforce Fundamentals

Build a strong foundation in Salesforce administration by learning how to configure applications, objects, security, and automation. Learn how to customize data models, manage users and permissions, design workflows and approvals, and use App Builder to support scalable business operations.

Why Salesforce Fundamentals?

Better Customer Relationships

Training your teams in Salesforce fundamentals helps them manage customer interactions more effectively and transparently. This fosters stronger relationships and increases customer loyalty in the long run.

Optimized Sales Processes

With Salesforce skills, your teams can streamline sales operations, track leads efficiently, and close deals faster. This has an overall positive impact on your sales strategy, and hence, performance.

Increased Workforce Productivity

Salesforce is known for its efficient workflow and process automation.

Data-driven Decision-making

Salesforce is known for improving data management and handling, allowing users to uncover deeper business insights. A workforce proficient in utilizing Salesforce for customer data management will be able to create more targeted marketing strategies, personalize customer experiences, and ultimately improve your ROI.

Training your team in its fundamentals will empower them to reduce redundancy in repetitive tasks and manage workflows more efficiently, significantly enhancing their productivity while lowering operational costs.

What you'll be able to do

- ✓ Understand cloud services and set up Salesforce developer accounts.
- ✓ Configure Salesforce apps, objects, and tabs.
- ✓ Learn how to customize fields, design page layouts, and manage record types.
- ✓ Implement validation rules, permission sets, roles, and data management.
- ✓ Create email templates, and workflows, and manage approval processes.
- ✓ Get acquainted with Salesforce's App Builder.
- ✓ Learn the intricacies of Salesforce administration settings.

Who this is for

- Salesforce Administrators
- Customer Service Representatives
- Salesforce Business Analysts
- Marketing Professionals

Curriculum

01 Setting Up and Managing Developer Accounts

- This module covers the foundational skills needed to start working with Salesforce. Participants will learn how to set up and manage developer accounts, which includes creating and managing apps within Salesforce. They will also get an introduction to the Salesforce development environment.
- Hands-on practice for setting up and managing developer accounts
- Validate configuration against fundamentals checklist
- Capture notes for reuse in later Salesforce courses

02 Object Creation and Management

- In this module, participants will define & configure custom objects and set up tabs for easy navigation, and work with different data structures. It also includes object creation, tab configuration, and managing object relationships.
- Hands-on practice for object creation and management
- Validate configuration against fundamentals checklist
- Capture notes for reuse in later Salesforce courses

03 Customizing Fields, Layouts, and Data Management

- This module covers the customization of various elements within Salesforce for specific business needs. Participants will learn how to customize fields and layouts, manage record types, and set up validation rules to ensure data accuracy.
- Hands-on practice for customizing fields, layouts, and data management
- Validate configuration against fundamentals checklist
- Capture notes for reuse in later Salesforce courses

04 Roles, Permissions, and Security

- This module discusses the configuration of roles and permissions to ensure the right people have access to the right data. It covers topics like setting up multiple roles, configuring permission sets, and managing user access to maintain a secure environment. Other areas of focus include role hierarchy and security best practices.
- Hands-on practice for roles, permissions, and security
- Validate configuration against fundamentals checklist
- Capture notes for reuse in later Salesforce courses

05 Workflow Automation and Data Management

- In the final module, participants will explore automation within Salesforce. They will design and implement workflows to automate routine business tasks to reduce manual effort, create approval processes as well as manage relationship fields to maintain accurate and interconnected data. They will also learn how to automate communication by setting up classic email templates.
- Hands-on practice for workflow automation and data management
- Validate configuration against fundamentals checklist
- Capture notes for reuse in later Salesforce courses

06 Introduction to Salesforce App Builder

- This module will cover the role of Salesforce's App Builder in creating custom applications. Learners will explore object relationships, development models, and data modeling techniques. By the end, learners will understand how to design applications that meet business requirements without extensive coding.
- Hands-on practice for introduction to salesforce app builder
- Validate configuration against fundamentals checklist
- Capture notes for reuse in later Salesforce courses

07 Administration Essentials

- This module introduces the basics of Salesforce administration, covering key tasks like managing roles, profiles, and data security. It also explores automating processes using tools like Workflows and Process Builder. Additionally, learners will get hands-on experience in user management, including creating users, setting up role hierarchies, and configuring permissions to control data access and security within Salesforce.
- Hands-on practice for administration essentials
- Validate configuration against fundamentals checklist
- Capture notes for reuse in later Salesforce courses