

SAE02

Salesforce Administrative Essentials



DURATA

40 ore

AUDIENZA

Nuovi amministratori di sistema responsabili dell'impostazione, configurazione e manutenzione delle applicazioni Salesforce della propria organizzazione. Altri gruppi che trarrebbero vantaggio dall'approfondimento della propria conoscenza di Salesforce Lightning Experience, inclusi utenti esperti, operazioni di vendita e responsabili IT.

OBIETTIVI

- Explain the Salesforce architecture and key terminology
- Use the application development lifecycle to define the process of managing an app's development, from design to final release
- Compare different methods for granting users access to functionality and data
- Build and customize applications to meet business requirements
- Describe use cases for data management and validation tools
- Analyze key performance indicators with reports and dashboards
- Automate business processes using key features and functionality
- Leverage the Salesforce ecosystem and resources to implement your Salesforce org

MODULI

Introduction & Overview

Salesforce Fundamentals

- Explore Salesforce
- Salesforce Architecture

Administrator Responsibilities

- Describe the Role of an Admin
- Plan for Success

The Big Picture: All Users

- Company Info and Licensing
- Fiscal Year and Currency
- Organize and Collaborate
- Manage Users
- Login Security Controls

Feature Access and Object Security

- Profiles
- Permission Sets
- Field-Level Security

Salesforce Record Access

- Record Ownership
- Organization-Wide Defaults
- Role Hierarchy
- Sharing Rules
- Teams and Manual Sharing
- Restriction Rules

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Customize Standard Functionality

- Object Overview
- Standard and Custom Fields
- Relationship Fields
- Custom Formula Fields

Customize the Existing User Interface

- Applications
- Home Page
- Tabs and List Views
- Page Layouts
- Buttons, Links and Actions
- Record Types, Business Process, Path

Create New with Click

- Create a New Object
- Dynamic Forms
- Create a New Custom Tab
- Create and Deploy a Change Set
- Mobile Layouts

Declarative Automation

- Automation Fundamentals
- Validation Rules
- Lead and Case Management
- Workflow and Approval Process
- Process Builder

The Future of Automation: Flow

- Flow Overview
- Build a Flow to Update a Field
- Build and Combine Flows
- Deploy Flow with a Lightning Component
- Order of Execution

Data Management

- Back Up Data
- Import, Export, Update Data
- Mass Delete and Mass Transfer
- Data Quality and Cleansing Tools

Analytics

- Report Components
- Filters and Formulas
- Conditional Formatting and Charts
- Exports and Subscriptions
- Dashboards