



Salesforce & Force.com for Technology Leaders (SPTL-101)

Course ID #: 7000-440-ZZ-Z

Hours: 24

Course Content

Course Description:

In this course, you will cover an introduction to the capabilities of Salesforce and Force.com so you can help your team members make good design decisions. This class is designed for technology managers, business analysts, software architects and technology leaders who are responsible for the success of a Salesforce or Force.com implementation. A student in this class will be exposed to a broad range of topics at the appropriate level of detail for a technology leader.

Course Objectives:

Upon completion of the class, a technology leader will be able to effectively coach their team on the appropriate use of the technology. The class will be taught by a senior instructor with real-world consulting and implementation experience who will lecture and facilitate discussions about the appropriate use of the technologies introduced.

Prerequisites:

None.

Target Audience:

Individuals who manage Salesforce or Force.com developers and administrators, executives involved in the strategy around implementing Salesforce or Force.com, and IT leaders who need to understand the impact of Salesforce or Force.com on their business. Software architects who want to fully understand the capabilities of the platform will also benefit from this class.

Topics:

Lesson 1: Salesforce.com Overview

- General Overview
- General User Interface
- Object Model
- Search
- Force.com Architecture
- Model, View, Controller (MVC)
- Apex & Visual Force
- Uses of the Platform
- Limits

Lesson 2: Software Development Lifecycle

Lesson 3: Project Management Strategies

Lesson 4: Licensing

Lesson 5: Organization Settings

- Locale, Language, Time Zone
- Fiscal Year
- Multi-Currency / Advanced Multi-Currency



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Lesson 6: System Security

- Users
- Network Security / Activation
- Login History
- Profiles
- Permission Sets
- Delegated Administration

Lesson 7: Record Security

- Record Ownership / Full Access
- Organization Wide Defaults
- Role Hierarchy & Roles
- Sharing Rules
- Manual Sharing
- Account Teams
- Opportunity Teams
- Queues
- Case Teams
- Apex Sharing
- Territory Management

Lesson 8: Customization

- Custom Fields
- Picklists
- Controlling & Dependent Picklists
- Formula Fields

Lesson 9: Field Level Security

Lesson 10: Customization

- Page Layouts
- Record Types

Lesson 11: Sales Cloud

- Opportunities
- Products & Price Books
- Product Schedules
- Quotes

Lesson 12: Sales Productivity Tools

Lesson 13: Field History

Lesson 14: Service Cloud

- Cases
- Solutions / Knowledge
- Case Assignment Rules / Case Auto Response Rules
- Email to Case / Web to Case
- Live Agent
- Escalation Rules
- Entitlements / Service Contracts
- ITIL

Lesson 15: Ideas/Answers

Lesson 16: Chatter

Lesson 17: Visual Workflow

Lesson 18: Object Relationships

Lesson 19: Lookup & Master Detail Fields

Lesson 20: Rollup Summary Fields

Lesson 21: Lookup Field Filters

Lesson 22: Custom Objects / Custom Tabs / Custom Apps

Lesson 23: Setup Audit Trail

Lesson 24: Home Page Configuration

Lesson 25: Automation

Lesson 26: Debugging

Lesson 27: Data Validation



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Lesson 28: Workflow

- Workflow Actions
- Email Templates
- Time Based Workflow

Lesson 29: Approval Processes

Lesson 30: Salesforce Record Id's

Lesson 31: Import Wizards / Data Loader

Lesson 32: Mass Transfer

Lesson 33: External Id's

Lesson 34: Mass Delete

Lesson 35: Weekly Data Export

Lesson 36: Data Migration Best Practices

Lesson 37: Marketing Cloud

- Marketing Relationships
- Leads / Lead Conversion
- Web to Lead
- Lead Assignment Rules / Lead Auto-Response Rules
- Campaigns
 - Campaign Members / Campaign Influence
- Social Contacts / Social Listening
- Social Hub / Salesforce for Twitter and Facebook

Lesson 38: List Views

Lesson 39: Reports

- Report Security / Report Folders
- Tabular Reports / Summary Reports / Matrix Reports / Join Reports
- Dates / Report Filters
- Report Charts
- Bucket Fields
- Custom Summary Fields
- Custom Report Types
- Report Scheduling

Lesson 40: Dashboard Overview

- Running User
- Dashboard Scheduling

Lesson 41: Content

Lesson 42: Partner Portal / Customer Portal / Salesforce Communities

Lesson 43: Force.com Sites

Lesson 44: Performance Optimization

Lesson 45: Deployment & Change Management

- Metadata API / Packages / Change Sets

Lesson 46: User Adoption

Lesson 47: Wrap-Up

Register for this class by visiting us at:

www.tcworkshop.com or calling us at 800-639-3535