

Salesforce Fundamentals for Business Administration Specialists

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|----------------|-----------------------------|
| Code: | BSX-101 |
| Length: | 3 days |
| URL: | View Online |

The Salesforce Fundamentals for Business Administration Specialists course will provide you with an understanding of what's possible with the Salesforce platform, its specific applications, and their business values and benefits. You will be given an overview of the complete suite of Salesforce products and how they integrate and interconnect. By learning the features and processes of the platform, you will be able to more effectively support day-to-day Salesforce business operations within your organization or department. Through three days of interactive lectures, discussions, and hands-on exercises, you will learn to recognize the important elements of the implementation lifecycle, the key considerations to drive user adoption, and the important components of ongoing management of your Salesforce environment.

Skills Gained

RECOMMENDED EXPERIENCE As this course is an introduction to and overview of Salesforce for the business user, there are no prerequisites or prior experience required. However, completing the following Trailhead/Help & Training modules prior to training will help you get the most out of this course.

- Salesforce Basics
- Salesforce User Tour
- Data Security
- Process Automation
- Reports and Dashboards
- Chatter Basics for Users

Who Can Benefit

The Salesforce Fundamentals for Business Administration Specialists has been developed specifically for the business “user”—the people who need to learn what’s possible with Salesforce functionality across the suite of products, but aren’t necessarily responsible for managing the application. The course is ideal for roles such as Customer Services Manager, Business Executive, Business Operations, Sales Operations Manager, or any other operations, management, or process analysis “super users” that need to fully understand the business value of the Salesforce platform.

Prerequisites

- Describe the primary business value of each major Salesforce Cloud.
- Manage users and data.
- Manage basic org configuration.

- Create email templates.
- Create reports and dashboards.
- Apply and champion Chatter.
- Understand the Salesforce implementation and maintenance lifecycle.
- Extend Salesforce functionality beyond basic configuration.

Course Details

Introduction

- How Salesforce Works
- Salesforce Applications
- Salesforce Organization

Data Access and Security

- Controlling Org Access
- Managing Who Views and Modifies Objects
- Unlocking Access to Records
- Sharing Access to Records
- Locking Down Individual Fields

User Management and Troubleshooting

- Creating New Users
- Troubleshoot Login, Record Access, and Field Visibility Issues

Customize Salesforce

- Thinking About Your Implementation
- Custom Fields, Picklists, Page Layouts, and Record Types
- Creating Email Templates

Automate Business Processes

- Validation Rules
- Assignment and Escalation Rules
- Web-to-Lead and Entitlements
- Lightning Process Builder and Workflow
- Approval Processes and Visual Workflow

Report On Your Data

- Reports Tab, Folders, and Formats
- Using the Report Builder
- Summarize Your Data

Using Reported Data

- Getting More Insight From Your Data
- Dashboards
- Your Analytics Strategy

Salesforce Everyday

- Chatter, Groups, and Communities
- Chatter Answers and Ideas
- Salesforce1
- Making Salesforce Part of Your Day

Data Management

- Data Migration Strategy
- Data Quality

Extending Salesforce

- Driving Salesforce Implementation
- Custom Objects, Apps, and the Salesforce AppExchange
- Build It Yourself

Wrap Up and Certification

- Certification Process and Resources

Schedule (as of 3)

| Date | Location | |
|-----------------------------|----------|------------------------|
| Jul 13, 2021 – Jul 15, 2021 | Virtual | Enroll |
| Aug 3, 2021 – Aug 5, 2021 | Virtual | Enroll |
| Aug 24, 2021 – Aug 26, 2021 | Virtual | Enroll |
| Sep 8, 2021 – Sep 10, 2021 | Virtual | Enroll |

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