

Salesforce Administration

2023-2024 Catalog

[ARCHIVED CATALOG]

INFM 260 - Salesforce Administration

PREREQUISITES: [INFM 219 - Business Intelligence and Reporting](#)

PROGRAM: Informatics

CREDIT HOURS MIN: 3

LECTURE HOURS MIN: 2

LAB HOURS MIN: 2

DATE OF LAST REVISION: Spring 2022

Introduces students to features and functionality used to maintain a Salesforce implementation. Salesforce Certified Administrator is an internationally recognized credential that can help propel the careers of Salesforce developers, administrators, architects, and sales professionals. Salesforce has become one of the most in-demand IT skills needed worldwide. It has become a highly sought after skill in many industries. Emphasis is placed on helping students to learn how to help students learn how to provide assistance to their companies in customer relationship management solutions that brings companies and customers together.

MAJOR COURSE LEARNING OBJECTIVES: Upon successful completion of this course the student will be expected to:



1. Apply the appropriate sales productivity features using opportunity tools
2. Apply the appropriate security controls based on the features and capabilities of the Salesforce sharing model.
3. Describe the capabilities of lead automation tools, campaign management, and activity management
4. Describe the capabilities of Salesforce Mobile App and identify use cases for AppExchange applications.
5. Describe the standard object architecture and relationship model.
6. Determine how to create, manage, and assign fields, page layouts, record types and business processes for custom and standard objects.
7. Distinguish and understand the administration of declarative configuration of the User Interface.
8. Examine the appropriate use of a custom profile or permission set using the various profile settings and permissions.
9. Explore the use of flows, workflow rules, approval processes, validation rules, and formula fields to automate complex business processes.
10. Identify the capabilities and implications of the sales process.

11. Understand the optimization of the features of Chatter.
12. Understand case management using Salesforce Knowledge, entitlements, support processes and service console.
13. Understand the capabilities of sandboxes and the tools available to move data between environments.
14. Understand the company settings and the proper setup & maintenance of users
15. Examine how to utilize dynamic dashboards and dashboard filters to enhance dashboards.

COURSE CONTENT: Topical areas of study include -

- Automation Solution
- Business Rules and Requirements
- Case Assignment Rules and Queues
- Chatter Features
- Collaboration
- Configuration and Setup
- Custom Reports
- Dashboard Management
- Data and Analytics Management
- Data Validation Tools
- Fields and page Layouts
- Hierarchy
- Lightning App Builder
- Marketing Applications:
- Object Manager
- Permissions
- Process Automation
- Productivity
- Relationships
- Roles Sharing
- Salesforce Knowledge and Entitlements
- Sales and Service Cloud applications
- Sales Applications
- Sandboxes
- Security Controls
- Service and Support Applications
- Session Settings
- Setup Audit Trail
- Workflow Automation



GRADING POLICY

A.....90-100

B.....80-89

C.....70-79

D.....60-69

F.....0-59

[Course Addendum - Syllabus \(Click to expand\)](#)

