Course Catalog

The following provides a summary of our entire course catalog. All titles and availability are subject to change. Contact your salesforce.com representative for a current listing.

Last updated April 13, 2011.

Premier Training: Train as many users as you want. As often as you need.

Imagine if your whole team had access to the entire salesforce.com course catalog, including unlimited access to our vast online training catalog that's exclusively for Premier Training members. Imagine if every user had unlimited seats in our instructor-led regional classroom trainings and virtual classes. Visit www.salesforce.com/premier to learn more about this unlimited, subscription-based training solution.

With Premier Training, you get:

- A huge online training catalog just for Premier Training members
- Instructor-led courses, delivered as a private event or at one of salesforce.com's regional training centers
- Virtual instructor-led courses, delivered by a live instructor using Webex Training Center
- Certification exams
- A week-long private class for administrators or developers
- An annual training consultation to create a training plan that's right for you

More about our online training catalog:

We've developed a comprehensive online catalog only for Premier Training subscribers.

It's dynamic. We frequently add new titles. For example, we generally add more than 10 titles per quarter.

It's for everyone. We offer training for all roles in your organization: sales, support, marketing, administrators, and developers.

It's effective. The content is interactive, with demonstrations, simulations, and test-your-knowledge quizzes.

It's flexible. You can select just the titles that members of your team need to know. The catalog is self-paced, so team members can move at the speed that suits them best.

It's scalable. At the flick of a switch, you have all the training content ready to help your team get productive fast. If your team members are spread out across geographies, Premier Training online scales globally.

For administrators

Administration Essentials (Enterprise & Unlimited Editions) (ADM201)

Become a Salesforce.com Certified Administrator! Administration Essentials is the core training that ensures your success with Salesforce. In this course, you learn best practices on how to set up, configure, and maintain your Salesforce sales, support, and marketing functionality. For maximum benefit, we recommend administrators take this course before starting a Salesforce deployment or when taking over an existing deployment. The certification exam is included for classroom attendees. *Classroom / 4 days or virtual classroom / five 5-hour sessions*

Administration Essentials (Professional Edition) (ADM202)

Same as above for those features included in Salesforce CRM Professional Edition. This hands-on, instructor-led course is offered in the traditional classroom format or via our new virtual classroom option. *Classroom / 3 days or virtual classroom / four 5-hour sessions*

Advanced Administration (ADM301)

Become a Salesforce.com Certified Advanced Administrator! For experienced administrators who are ready to increase their skills and knowledge about how Salesforce can solve their most pressing business needs. Using real-world scenarios, Advanced Administration covers topics such as managing data, enhancing end-user productivity, and expanding Salesforce to help you work more efficiently and get more from Salesforce. **ADM201 Administration Essentials** or 6 months of Salesforce CRM administration experience recommended. The certification exam is included. *Classroom / 5 days*

Release Training (ADM250)

For administrators who need to keep up with the new functionality in Salesforce CRM major releases. Learn how to use and implement the new features of each release. *Online / 2–4 hours*

Online Training for Administrators – Exclusive to Premier Training

- **Administration Essentials (ADM201 online)** – The same content as the classroom version, but served up in the self-paced online format exclusive to Premier Training customers.

    1. **Overview of Salesforce CRM** – This module provides an overview of Salesforce CRM. Learn about the evolution and architecture of Salesforce CRM, the different editions and applications that are available, and the different standard objects you can use to store and manage your data.
    2. **Identity Confirmation** – Learn how to use the identity confirmation feature to activate computers outside your IP ranges, enter trusted IP ranges, and keep your application both secure and accessible for your users.
    3. **User Interface** – Learn how to enable and customize a variety of user interface settings for your end users, including list views, tags, search, and inline editing.
    4. **Organization Administration** – Learn the basics of organization administration, including how to set up your company profile, add multi-currencies, and use fiscal years.
    5. **Customization** – Learn how to configure Salesforce CRM to suit your business needs, including how to create custom profiles, custom fields, and page layouts. You'll also learn how to use tab settings, record types, and field-level security to control what data your users can access in the application.
    6. **Security and Access** – Learn the basics of configuring security and access settings in Salesforce CRM. You'll learn how to create and maintain user records as well as set up your company's organization-wide defaults, role hierarchy, and sharing models. You'll also learn how to mass-transfer records, set up account and sales teams, and create folders to provide access to your organization's key documents.
    7. **Workflow Approvals** – Learn how to create an automated business process by using workflow approvals. You'll learn how to plan your approval process, use the built-in wizards to create and test your process.

8. **Data Validation** – Learn how to use Salesforce CRM validation tools to ensure data integrity before it's saved in the application. You'll learn how to create data validation rules, set up a validation design methodology, and use the required and unique property features to control data that is entered.
9. **Data Utilities** – Learn the basics of data utilities, including how to use data import tools like the data loader to import and export records as well as update existing data. You'll also learn about the weekly export feature and best practices for storage utilization.
10. **Analytics** – Learn the basics of reporting in Salesforce CRM, including how to create standard and custom reports by using different report types and filter criteria. You'll also learn how to create custom summary formulas and use dashboards to display your results.
11. **AppExchange** – Learn how to search for and install applications from the AppExchange. You'll also learn how to manage and delete applications you've installed.
12. **Marketing Administration** – Learn about the marketing administration features available in Salesforce CRM's marketing functionality. Specifically, you'll learn how to create a campaign targeting both existing and new leads, convert leads, and measure campaign results.
13. **Service Cloud** – Learn the basics of administering salesforce.com's Service Cloud. You'll learn how to define the settings and rules for case processing. You'll also learn how to set up solutions to help support reps resolve cases more quickly and increase self-service options.
14. **Salesforce CRM's Console** – Learn how to set up Salesforce CRM's console so users can access and view related information on one screen. You'll also learn how to configure the console so that it fits your business needs and how to navigate through the console to find the information you want quickly.
15. **Extending Salesforce CRM** – Learn about the application features that let you extend your Salesforce CRM implementation.

- **Getting a Head Start with Chatter** – Get ahead of the curve with Salesforce Chatter, the enterprise collaboration tool. Learn how to enable Chatter and train your users on best practices. Join the conversation today!
- **Managing Data for Administrators** – From importing and exporting data, enforcing data integrity, and keeping track of storage limits—this course covers it all. This five-module course covers everything from simple imports to advanced techniques and concepts. In other words, everything you need to know to improve reporting, forecasting, and efficiency across your company, and make a critical difference to your bottom line.

1. **Overview of Data Management** – Learn about the many types of data management that are part of the day-to-day activities of a Salesforce CRM administrator. Plus, learn about the tools available for every task, from importing and exporting records to ensuring data integrity and backing up data.
2. **Wizards, Reports, and Office Connector** – Learn the quickest ways to get data into and out of Salesforce CRM. Import leads, contacts, and accounts through the wizards. Use reports to export data from Salesforce CRM into an Excel or csv file. Use the connector for Office, which lets you leverage Salesforce CRM data in Excel or Word for pivot tables, advanced formulas, mail merges, and more.
3. **Advanced Tools and Concepts** – Learn the process of using the data loader and Excel connector. The loader lets you import and export data as well as perform more advanced tasks such as deleting and updating records. The Excel connector lets you perform these tasks from an Excel interface—great for ad-hoc operations.
4. **Cleansing Data** – Duplicates, incomplete records, and bad data: maintaining data integrity is an ongoing task for every administrator. In this course, you'll learn several useful tips for scrubbing data, from AppExchange tools to Excel formulas. You'll also learn best practices for designing a user interface that helps to capture and maintain clean data.
5. **Working with Storage Limits** – Learn about data storage, mass deletions, and weekly exports. Keeping control over your data storage, including attachments, will enhance performance, making it easier for users to mine and leverage the data in Salesforce.

- **Workflow from Case Comments** – Learn how to set up a workflow on the case object to save time to process cases.
- **Case Teams** – Learn how to set up and add members to a case team to enable full communication and collaboration on solving customer issues.
- **Schedule and Email Reports** – Learn how to schedule and email reports to specific users.
- **Forecasting for Administrators** – Learn how to set up customizable forecasting within your own organization, including definition of key fields and processes such as the stage field and the forecast hierarchy. With customizable forecasting you can set up Salesforce to capture your sales process, ensuring useful and accurate forecasting.
  1. **Overview of Forecasting** – Definitions for key terms and concepts, including forecast aggregates, forecast hierarchy, and roll hierarchy. A demo shows forecasting from the end users' perspective and the module describes submitting and overriding a forecast.
  2. **Setting Up Forecasting** – Setting up forecasting within your own organization, from enabling forecasting to defining your fiscal year and your forecast settings. The module also explains how to set up the forecast hierarchy and enable individual users with the correct profile permissions so they can use customizable forecasting.
  3. **Customizing Forecasting** – Learn how you can capture your sales process within Salesforce. Exercises guide you through customizing the stage fields and setting the default values for probability and forecast category. Take a short tour of the AppExchange to see various sales methodologies that can be automatically incorporated into Salesforce. The module also covers customizing the page layout for opportunities with forecasting fields.

> "The Salesforce.com Certification Program will make it **much easier to identify, evaluate, and hire qualified candidates.**"
>
> John Barnes
> VP of Technology
> Model Metrics

- **Content Library for Administrators** – Learn how to create workspaces and workspace permissions, add users to a workspace, and configure tagging rules.
  1. **Creating Custom Workspace Permissions** – Learn how to create custom permissions for workspace members through the Administrator Setup link.
  2. **Create a Workspace and Add Users** – Learn how to create a Salesforce CRM content library workspace and add users.
  3. **Configure Tagging Rules** – Learn how to create tagging rules to categorize content.
  4. **Configure Content Types** – Learn how to create content types—forms that display a unique set of fields and let users describe content in detail—and make it easier for users to find what they need.
- **Salesforce Connector for CTI** – With the Salesforce connector for CTI, you can directly integrate your telephone network into Salesforce CRM and access it through the familiar, browser-based Salesforce CRM interface. In this course, you'll learn how the Salesforce connector for CTI will help leverage your existing infrastructure to improve call handling, response times, and agent performance.
- **Using Web-to-Lead** – This course is developed for marketing admins who have experience using Salesforce CRM applications, but have no experience with Web-to-lead functionality. Understanding how to use Web-to-lead efficiently will let your company generate more leads from its website.
- **Products, Price Books, and Assets** – Learn how to create and populate price books, create products, product families, and set up revenue schedules. In addition you'll learn how to restrict access to price books and track existing assets on the account record.
- **Setting Up and Administering Ideas** – This course will teach administrators the basics of setting up the ideas functionality in Salesforce CRM. In addition, the course will cover the ongoing management of an ideas community and how to keep community members engaged.

- **Administering Salesforce CRM's Knowledge** – This module will teach administrators the basics of setting up Salesforce CRM's knowledge functionality for their organization: enabling and setting up knowledge in an org, creating article types, creating category groups, and providing appropriate access to users.
- **Managing Users and Troubleshooting Login Issues** – Learn the key components of a user record. For example, discover how to add users so they can begin leveraging the power of Salesforce. You'll also learn how to create new users, deactivate existing users, troubleshoot user login issues, and log in as an end user to troubleshoot data access issues.
- **Creating Formulas to Enhance Your Apps** – This course provides an introduction to creating and using formulas in applications and uses explanations, demonstrations, and simulations to show even a formula novice the basics. You'll examine the use and components of formulas and learn a framework for building them. You'll also get to try your hand at creating two formulas through guided simulations.
- **Configure Salesforce with Custom Fields** – This hands-on course is ideal for the new administrator who wants to customize records and objects to suit specific business needs. Learn how to customize standard fields and create new custom fields. Interactive simulations guide you through creating the following custom field types: picklist, percent, formula, and dependent lookup fields.
- **An Introduction to Managing Support in the Cloud** – Learn about the Service Cloud and the many tools available for managing a service and support operation. This interactive course covers everything from managing a case and creating a console to creating custom reports to analyze support center metrics.
- **Automating Your Service Cloud** – Learn advanced techniques for your Service Cloud implementation to achieve the highest levels of customer satisfaction. You'll get an overview of tools and features like email templates, assignment rules, and escalation rules as well as hands-on experience with these tools to help manage and monitor the life cycle of cases.
- **Launch Your Own Customer Portal** – Learn how to build your customer community and enable self-service with the Service Cloud customer portal. You'll get an overview of customer portal features plus hands-on experience creating and branding your customer portal and creating an area to provide your customers with timely answers using salesforce.com's online community.
- **Administering Entitlements** – Learn all about using entitlements in your Service Cloud. You'll see how to create entitlement processes and templates for unique service agreements with your end customers, and understand how to track which products and services are covered. Finally, you'll be able to automate tasks to simplify management of service level agreements for your call center agents.

For developers

Building Applications with Force.com (DEV401)

Become a Salesforce.com Certified Force.com Developer! For new Force.com developers who want to create custom Force.com applications or customize existing Salesforce applications. You'll learn how to use the declarative "clicks not code" capabilities of the Force.com platform to create new applications and use Force.com pages and components to create custom interfaces. The certification exam is included. *Classroom / 5 days*

Force.com Code (Apex) & Force.com Page Controllers (DEV501)

Become a Salesforce.com Certified Force.com Advanced Developer! For experienced developers who want a deep-dive into Force.com capabilities to build and deploy Force.com applications. The hands-on curriculum covers the Java-like Force.com code, Apex, and Force.com page controllers. The certification exam is included. *Classroom / 5 days*

Force.com Integrations (DEV502)

The integrations course is designed for independent software vendors (ISVs), customer developers, and system integrators (SIs) wishing to learn how to design and build all types of integrations with the Force.com platform.

The first day touches on the major methods of integration with Force.com and demonstrates multiple techniques without drilling into the developer level. The second and third days of the class dig deeper into developer specifics of each technology that plays a role in integrating with the Force.com platform. Note that to get the full potential out of this course, you should be comfortable writing Java or C# object-oriented code. *Classroom / 3 days*

Introduction to Object-Oriented Programming with Force.com Code (Apex) (DEV531)

This course provides those who are a new to programming with an introduction to object-oriented programming using the Java-like Force.com code, Apex. In this class, you'll learn the basics of creating classes and triggers in Force.com code as well as best practices and development methodology concepts that will help you be successful as you start to build your first Force.com applications. At the end of this class, you'll understand how to approach your first programming assignment, how to construct basic Force.com code to build on the Force.com platform, and get hands-on experience with the Force.com toolset. *Classroom / 5 days*

Release Training (ADM250)

This course is for developers who need to keep up with the new functionality in Force.com major releases. Learn how to use and implement the new features of each release. *Online / 2–4 hours*

Online Training for Developers – Exclusive to Premier Training

- **Introduction to Force.com** – Learn about the Force.com platform's features and functionality.
- **Building Applications with Force.com (DEV401 online)** –The same content as the classroom version, but served up in the self-paced online format exclusive to Premier Training customers. The online course is organized into the major groupings below.

Application Essentials (DEV411) – This course examines application-building basics such as custom objects, custom fields, and simple workflow.

1. **Designing Applications on the Force.com Platform** – Learn Force.com application building basics and principles.
2. **Building Your Data Model** – Learn how to create custom objects, custom fields, and custom relationships.
3. **Building Your User Interface** – Learn how to modify the user interface with page layouts, custom applications, and custom tabs.
4. **Introducing Business Logic** – Learn basic business logic functionality, including how to create workflow, validation rules, and formula fields.

Designing Apps for Multiple Users (DEV421) – This course covers the tools used to ensure that an application delivers the right levels of access to the right users, including Org Wide Defaults, Roles, Profiles, and Sharing.

1. **Design Considerations** – Learn the business requirements an organization has when setting up security and access.
2. **Managing Your Users' Experience** – Learn how to set up users with appropriate permissions, including how licenses and profiles dictate a user's access to an application.
3. **Controlling Access to Records** – Learn the ways in which users receive access to records: through ownership, organization-wide defaults, roles, and sharing rules.
4. **Designing Data Access Security** – Learn about security and access features, then apply the knowledge gained about determining user access to various business scenarios.

Implementing Business Processes (DEV431) – Learn the various ways of customizing the business process layer of an application. Topics include formula fields, workflow, and approval processes.

1. **Implementing Business Processes** – Learn the typical business requirements for automating processes in Force.com, frequently used functions for formulas, and ways to monitor automated processes.
2. **Preserving Data Quality** – Learn different implementations of validation rules to enforce conditionally required fields, data format, and data consistency as well as validation rules to prevent data loss.
3. **Automating Business Processes** – Learn about approval processes, including those with multiple steps, multiple approvers, and processes that skip steps. Also learn how to use time-dependent workflow to automate processes and outbound messaging to keep Salesforce in sync with other systems.
4. **Auditing Processes** – Learn the tools and methods for auditing changes to both the configuration of and the data in Salesforce.

Data Management (DEV441) – This course describes the tools for bringing data into your application, including the import wizards, the Force.com data loader, and data loader command line operations.

- **Force.com Code (Apex) & Force.com Page (Visualforce) Controllers Online (Dev 501)** – The same content as the classroom version, but served up in the self-paced online format exclusive to Premier Training customers. The online course is organized into the major groupings below.

Force.com Page (Visualforce) Controllers (DEV521 Online) – This course shows how to combine your previous knowledge of Force.com pages (Visualforce) to create Force.com page controllers. Using controllers, you can start creating advanced interfaces to handle custom data sets or actions for a richer user experience.

1. **Force.com Page (Visualforce) Controllers** – Learn the basics behind creating standard and custom Force.com page controllers and controller extensions, including creating getter and setter methods for custom data sets and creating custom actions and navigations.
2. **The Advanced Aspects of Force.com Page (Visualforce) Controllers** – Learn more about controllers, including how to code controllers for multi-page Force.com wizards and the specifics about testing controllers.

Force.com Code (Apex) (DEV541 online) – This course shows you how this object-oriented, Java-like programming language differs from other programming languages you've used in the past. Includes lessons on when and how to use Force.com code, specifics on syntax and other language features, and hands-on exercises that let you apply these tools in real-world scenarios.

1. **Introduction to Force.com Code (Apex)** – Get an introduction to Force.com code and discover what this Java-like programming language is capable of, what makes it different from other programming languages, how it works with the Force.com IDE, and where it can be authored and executed.
2. **Implementing Classes and Objects** – Dig deeper into the world of Force.com code with details on creating classes and objects. Learn the essentials around proper syntax as well as specific variables and keywords. Also learn about security and sharing safeguards.
3. **Structuring Data** – Learn about the different data types used for Force.com code variables, including sObjects, which are unique to Force.com. Review variables and expressions, and discover how they function in Force.com code.
4. **Conditional and Loop Statements** – Review conditional statements, including an analysis of the five procedural loop statements that are supported by Force.com code. Each one is explained with detailed descriptions and examples so you're confident about when and how to use them.
5. **Implementing Library Classes and Methods** – Find out all about the delivered classes that come with the Force.com code language and their methods. Knowing the delivered library will ensure that you have all the tools you need and prevent you from re-inventing the wheel.
6. **Implementing Triggers** – Triggers are unique to Force.com and can execute when any data is saved. Learn about the different types of Force.com triggers and the context in which to use each of them. Specifics include creating and executing triggers, and the proper syntax and variables to use with them.

7. **Exception Handling, Debugging, and Testing** – Ensure that your code runs smoothly by learning about the Force.com code error-handling framework, and learn how to expand that framework with custom exceptions. Learn about the various tools available to you for debugging code as well as creating the required, environment-independent unit tests that must be created to deploy your code.
8. **Deploying Force.com Code (Apex)** – Find out all about migrating your Force.com code from the development environment into a production environment. Learn about the tools available for deployment and the various sandboxes available for development. Details include specific deployment steps, and tips for training end users in the new production environment.
9. **Working with Web Services** – Learn all about creating your own custom Web Services for handling inbound requests as well as Force.com callouts for making outbound calls to external Web Services.
10. **Receiving and Sending Emails through Force.com Code (Apex)** – Create a Salesforce email service for handling inbound messages. Learn to send outbound messages directly from Force.com. This module includes thorough setup instructions as well as information about creating debugging and email logs.
11. **Advanced Topics** – Continue to hone your Force.com code skills with these advanced topics. Subjects include dynamic Force.com code, Force.com page controllers, Force.com schedulers, and custom settings objects that can be used to store configuration data.

- **Record Access and the Force.com Sharing Model** – This course examines the factors determining whether a record is accessible to a user and provides guidelines for making decisions about org configurations. This course is also valuable for administrators.
- **Force.com Sites: Introduction** – Learn how to describe Force.com sites, identify use cases, enable a Developer Edition org, register a Force.com domain name, create a Force.com site, set the Public Access Setting for a Force.com site, and locate additional resources.
- **Managing Development with Force.com** – Learn about the Force.com platform's development tools and environment, team development and debugging best practices, and deployment capabilities.

1. **Managing Development Overview** – Learn about Application Lifecycle Management and the Force.com development model, including the Metadata API, the Force.com IDE, the Force.com sandbox, and Force.com code (Apex).
2. **Integrated Development Environment (IDE)** – Learn how to use the IDE to test SOQL queries, deploy org configurations between environments, employ system logs, employ code share, and more.
3. **Managing Change** – Learn about team-based development, quality assurance and testing strategies, release management best practices, and how to use the Force.com migration tool to use command line deployment capabilities.

- **Record Types and Page Layouts** – Examines the uses of record types and their relationship with page layouts to form different experiences for different users.
- **Force.com Pages (Visualforce)** – Learn the capabilities of the Force.com pages framework: how to incorporate pages; how to use tags to create page layouts, input forms, output tables, and custom components; and how to use JavaScript and AJAX with tags to build a richer user experience.

1. **Introduction to Force.com Pages (Visualforce)** – Introduces the primary features and capabilities of Force.com pages, including the Model-View-Controller (MVC) pattern for incorporating Force.com pages into an application.
2. **Force.com Pages (Visualforce) Tags** – Learn the basics of Force.com pages tag syntax and how tags are similar to HTML, XML, and JavaScript.
3. **Force.com Pages (Visualforce) Tag Library** – Learn about Force.com pages tags grouped by function, including key attributes and the main values for those attributes.

4. **JavaScript in Force.com Pages (Visualforce)** – Learn action binding and JavaScript, JavaScript functions, partial page updates, asynchronous operation status, and AJAX behavior on events; how to perform partial page refreshes using native functionality; and how to use JavaScript and AJAX to enrich the user experience.
5. **Further Topics in Force.com Pages (Visualforce)** - Continue to learn Force.com pages with these advanced topics: using Force.com pages to build Force.com sites and developing Force.com pages for mobile devices.

- **Force.com Sandbox** – Examines the uses of record types and their relationship with pages layouts to form different experiences for different users.
- **Creating Wizards with Programmable User Interfaces** – Enrich your users' experience with your app with wizards. Combine your knowledge of Force.com pages (Visualforce) markup and controllers to create a user interface that allows stepwise data entry. Learn how controllers are used to maintain state across Force.com pages. Some programming experience with Force.com code (Apex) is recommended.
- **Combining Force.com with the Adobe Flash Platform** – Put your knowledge to use with the latest Force.com platform technology. Learn how to bring the power of two development platforms—Force.com and Adobe Flash—to your projects.
- **Firefly for Salesforce** – Learn how to easily automate specific business processes with Firefly for Salesforce

1. **Building Your First Spark** – Discover the basics needed to set up a simple spark process, including important terminology and step-by-step instructions.
2. **Automating Business Process** – Get the most out of your spark by automating the business process with the use of decision items.
3. **Constants and Resources** – Make your spark easier to manage and simplify business process automation by learning how to use constants and resources.
4. **Variables, Allocators, and Loops** – Customize your spark to fit your business needs by taking advantage of variables, allocators, and loops.
5. **Forms** – Learn how to use forms to logically group part of your process together, which will streamline the experience for end users.
6. **Data Sources and Choice Filtered Lists** – Find out how to collect data from multiple objects within Salesforce and use the details in a spark.
7. **Data Lookups and Choice Filtered Lists** – Learn how to refine the database access to view filtered data from Salesforce in a spark.

- **Analytics as a Service** – This course begins with report and dashboard basics and also covers more advanced topics such as custom report types, custom summary formulas, and analytic snapshots. Finally, it covers tips and tricks to customize reports to meet specific business requirements.

1. **Course Orientation** – Learn about the structure and presentation style of the Analytics as a Service course and the best way to approach the course and exercises.
2. **Introduction to Reports** – Learn the steps to create reports as well as tips to translate business requirements into reports.
3. **Introduction to Dashboards** – Learn how to create dashboards and establish security for them.
4. **Custom Report Types** – Learn the benefits of creating custom report types and how to modify the report wizard user interface, relate multiple objects, and use the "with or without" framework.
5. **Reports You Can Count On** – Learn a number of techniques to help users create effective reports for counting, including creating a custom field to count individual rows, a custom field to "bucket" information, and custom summary formulas.

6. **Analytic Snapshots** – Learn how to use analytic snapshots to capture data over time and report on the data to analyze historical trends.

7. **Going Beyond Salesforce CRM Reports** – Learn about ways to extend your reporting capabilities beyond what is available in Salesforce CRM.

For implementers

Implementation Essentials (CON201)

For consultants ready to take their implementation skills and careers to the next level. In this course, you'll learn best practices on how to implement the Sales and Service Clouds using process maps, important design considerations, key reporting metrics, and data management and migration strategies. *Classroom / 3 days*

Online Training for Implementers – Exclusive to Premier Training

- **Implementation Essentials (CON201 online)** – The same content as the classroom version, but served up in the self-paced online format exclusive to Premier Training customers. The online course is organized into the major groupings below:

  Implementing CRM Essentials – Get to know the basic rules of a CRM implementation—from managing security settings to best practices around data and integration management—and learn how to support your Sales or Service Cloud implementations.

  Implementing the Sales Cloud – Explore various implementation strategies for the Sales Cloud. Understand key elements of managing sales and how to leverage specific Salesforce features to support unique business process requirements.

  Implementing the Service Cloud – Get to know the various implementation strategies for the Service Cloud. Understand key elements of managing customer service and how to leverage specific Salesforce features to support unique business process requirements.

For end users

Online Training for End Users – Exclusive to Premier Training

- **Getting Started with Salesforce CRM Navigation –** Discover all the tools you need to get started with Salesforce, including basic navigation, key terms, and relationships.
- **Leveraging Data with Reports** – Learn how to use reports to get the most out of your data.
- **Seeing the Big Picture with Dashboards** – Create and view real-time snapshots of your corporate metrics and key performance indicators using dashboards.
- **Staying Connected with Connect for Outlook** – Install the Salesforce connector for Microsoft Outlook and synch your activity and contact data with Salesforce CRM.
- **Building Your Sales Pipeline** – Learn all about leads and how to use them to build your pipeline in Salesforce CRM.
- **Your Data Repository** – Manage and keep in touch with your key relationships through accounts and contacts. Learn how to take advantage of your document library as a resource for storing and managing your important documents.

1. **Accounts** – Effectively use accounts and account relationships to keep track of your key clients.

2. **Contacts** – Explore the relationships between contacts and other key Salesforce CRM items like accounts and opportunities. Learn how to manage and keep in touch with your contacts.

3. **Documents Tab** – Take advantage of your document library as a resource for storing and managing your important documents.

- **Hitting Your Numbers** – Learn how to create and track opportunities plus how to get the most out of your calendar through activity management.
    1. **Tracking Your Opportunities** – Learn how to better manage your sales pipeline by creating and updating opportunities.
    2. **Managing the Calendar and Your Activities** – Learn to prioritize and manage your upcoming and past tasks using activities and activity history.
- **Introduction to Quotes for Sales Reps** – Accelerate your deal lifecycle with real-time quotes. Learn how to create a quote from an existing opportunity, generate a PDF, and quickly get your customers what they need with just a few clicks.
- **Forecasting for Sales Reps and Managers** – Introduces forecasts, quotas, and pipelines; learn how opportunities roll up into forecasts, the relationship between stages and forecast categories as well as key fields, and how to read a forecast and its various components.
    1. **Overview of Forecasting** – Defines the basic terms of forecast, quota, and pipeline; covers the concept of forecast rollups; demonstrates the forecasting tab from both a sales rep's and a manager's perspective.
    2. **Key Fields in the Forecast** – Learn how the stage, amount, probability, and forecast category fields relate to each other and how they affect the forecast.
    3. **Reading Your Forecast** – Learn the relationship between the forecast category field and the forecast summaries as they appear on the Forecast tab.
    4. **Adjusting and Submitting Your Forecast** – Learn how to edit a forecast in two ways: by overriding an individual opportunity or by editing a forecast summary.
- **Reporting for Sales Managers** – Learn how to get business data out of Salesforce CRM faster and more efficiently. You'll learn how to use tools to make fast customizations to the standard reports that come with Salesforce CRM and gain experience with more substantial customizations as well.
- **The Service Cloud** – This course covers the many tools available through the Service Cloud. Learn the creation and management of cases and solutions as well as the agent productivity tools. Also learn the functionality of the self-service portal and customer portal.
    1. **Getting Started with Service and Support** – Introduces the tools and processes covered in the course.
    2. **Case Management** – Learn how to create cases and manage them through related lists and the cases home page.
    3. **Solutions** – Follow a solution from its creation and the initial draft stage through the reviewed status.
    4. **Agent Productivity** – Learn what tools are available to manage support reps' case loads easily and efficiently, including related lists, the console, reports, and dashboards.
    5. **Portals** – Learn how the self-service portal and the customer portal empower your customers to leverage your existing knowledge base.
- **Reporting for Call Center Managers** – As a call center manager you need better visibility into your team's cases. This course helps you gain insight into your team's caseload and response times using standard and customized standard reports. You'll learn which support reports to run to answer questions like these:
    - How many calls did my team receive this week?
    - How many open cases do we currently have?
    - How many cases are routed to the right resources the first time?
    - And how many of my team's cases are closed during the first call?

You'll also learn how to set up advanced filters, use charts to make your data easier to visualize, and use other tools like conditional highlighting to distinguish specific data points in your reports.

- **Publishing Articles with Knowledge** – Learn how to create, manage, and distribute different types of articles, including how to categorize them for easy retrieval and publish them to various channels as needed.
- **Using Articles with Knowledge** – Learn how to quickly find the articles you need to help with customer issues, including how to search on articles from a case and how to attach relevant articles to cases.
- **Salesforce CRM's Content Library for Publishers** – Learn about Salesforce CRM's integrated content library, including how to publish content, share it with other workspace members, and keep content current.

1. **Publish and Share Content** – Learn how to publish and share content with workspace members.
2. **Keeping Content Up to Date** – Learn the tips and tricks for keeping your content current and relevant.
3. **Featuring Content** – Learn how to bring important content to the attention of your users.
4. **Content Delivery** – Learn how to get greater control over the content you share and gain insight into which materials are being viewed and consumed.
5. **Content Packs** – Learn how to take advantage of content packs to put together multiple customer case studies on a specific industry or product or a set of forms that all need to be printed out at the same time.
6. **Personal Workspace** – Learn about the personal workspace feature—your "desktop in the cloud"—that lets you save materials you don't want to share with other users.
7. **Presentation Assembly** – Learn how Salesforce CRM's content library makes it easy for you to create presentations by leveraging existing materials.

- **Campaign Management** – Learn how to create a campaign and target lists, execute a campaign, track responses, and analyze your campaign's effectiveness.
- **Sending and Tracking Mass Emails** – Learn how to create mass emails based on specific campaigns as well as how to run reports on bounced emails.
- **Creating a Salesforce to Salesforce Connection** – Learn how to use Salesforce to Salesforce to securely share information with your partners in real time. Create a connection, take advantage of custom invitation email templates, and understand the publish-and-subscribe model at the heart of Salesforce to Salesforce.
- **Using Salesforce to Salesforce** – Learn how to use Salesforce to Salesforce. This course guides you through the record-sharing process with your partners. Learn to use the Salesforce to Salesforce sharing service model in a typical sales cycle from lead qualification, to converting the lead to an opportunity, then working the opportunity, and finally closing the opportunity.
- **Force.com Connect Offline** – Learn how to install and navigate Force.com Connect Offline, including adding records to your offline configuration, uploading your offline contents back into Salesforce, and dealing with conflict resolution.
- **Salesforce Mobile** – Learn about Salesforce CRM's mobile capabilities and how they can make you more efficient.

REGISTER ONLINE: Check available classes at www.salesforce.com/training. To speak with a training & certification expert, contact your local salesforce.com office or call 1-877-TRAIN10.

Corporate Headquarters
The Landmark @ One Market
Suite 300
San Francisco, CA, 94105
United States
1-800-NO-SOFTWARE
www.salesforce.com

Global Offices
Latin America +1-415-536-4606
Japan +81-3-5785-8201
Asia/Pacific +65-6302-5700
EMEA +4121-6953700

DS_CourseCatalog_2011-04-13