

Course Catalog

The following provides a summary of our entire course catalog. This list changes with every new addition. Some titles may be under development. All titles and availability are subject to change. Contact your salesforce.com representative for a current listing. Last updated February 22, 2010.



Arm your people with the knowledge and skills they need to get the most from your Salesforce CRM investment. Administrators, developers, implementers, sales, service, and marketing personnel can choose from a portfolio of regional classroom, live virtual, and self-paced online courses covering the family of Salesforce CRM applications and the Force.com platform. All courses are designed by our subject matter experts and are delivered by salesforce.com authorized instructors virtually, in convenient classroom locations around the world, or as a private event at a location you choose.

Salesforce.com offers certification for all your administrators and developers. It's the first official professional credential in cloud computing.

Premier Training: unlimited training for every user

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

About online training

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

It's dynamic. We update it frequently with new titles. For example, we generally add 10+ titles per quarter. We respond to customer requests for new titles. We also add titles for new releases, new capabilities, and new features. We've got all the training for you now and in the future.

It's for everyone. The Premier Training online catalog offers training for all roles in your organization: sales, support, marketing, administrators, and developers. It covers the applications, products, and functionality each person uses.

It's effective. The high-quality production values of Premier Training online ensure that your team is engaged. The content is interactive, with demonstrations, simulations, and test-your-knowledge quizzes so your team will learn the skills to effectively use the tools available.

It's flexible. The catalog is modular. You can select just the titles that members of your team need to know. They can jump to modules that they're most interested in. The catalog is also 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. Because it's online, Premier Training can help you train as many users as you need. If you have new hires, you can get them up to speed without disrupting your business. If your team members are spread out across geographies, Premier Training online scales globally.

“The Salesforce.com Certification Program will make it much easier to identify, evaluate, and hire qualified candidates.”

— John Barnes
VP of Technology
Model Metrics

For administrators

Administration Essentials for Enterprise & Unlimited Editions (ADM201)

Become a Salesforce.com Certified Administrator! For new administrators or current administrators who need to formalize their knowledge and skill sets. Sign up for our most popular course and learn how to set up, configure, maintain, and customize Salesforce CRM. The course also covers data utilities, security, and analytics, and explores key features of marketing campaigns, support, and the AppExchange. The certification exam is included for classroom attendees.

Classroom / 4 days, or virtual classroom / five 5-hour sessions

⚡ **Administration Essentials (ADM201 Online)** – This is the same training content as the classroom version and it is now offered in a convenient self-paced online version for Premier Training subscribers only.

Course Orientation – This module provides an overview of the eLearning course, including interactions, demos, and exercises.

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, among others.
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. In addition, you'll 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. In addition, you'll 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 your process, 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. In addition, you'll 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. In addition, you'll 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 that you've installed.

- 12. Marketing Administration** – Learn about the marketing administration features available in Salesforce CRM Marketing. Specifically, you'll learn how to create a campaign targeting both existing and new leads, convert leads, and measure campaign results.
- 13. Salesforce CRM Service** – Learn the basics of administering Salesforce CRM Service. You'll learn how to define the settings and rules for case processing. In addition, you'll 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.

Administration Essentials for 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 ready to take their Salesforce CRM implementation to the next level. Learn to build powerful business solutions using real-world business scenarios. You'll work with the advanced Salesforce CRM functionality, the Force.com platform, the Force.com API, and the AppExchange.

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

- :: 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. In addition, learn about the tools available for each 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 CRM.
- ❑ **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. This includes 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.
 - ❑ **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.
 - ❑ **Admin to Hero with Force.com** – This course gives you the tools to move from Salesforce CRM administrator to app builder by tailoring your org to fit your business needs or creating a custom app on the Force.com platform.
 1. **Showcase a Sample Custom Application** – Offers a tour of a custom Force.com application used to manage recruiting activities, providing a complete picture of the capabilities of the platform in action.
 2. **Basic Application Design** – Learn about basic application design strategies for the Force.com platform.
 3. **Create Custom Objects and Fields** – Learn how to create a custom object and add custom fields.

4. **Create a Custom Object Tab** – Learn how to create a custom object tab for a custom object.
 5. **Modify a Page Layout** – Learn how to modify the page layout for a custom object.
 6. **Add Data** – Learn how to load data into a custom object using the custom object import wizard.
 7. **Add Custom Applications** – Learn how to create a custom app to organize the associated custom object tabs.
 8. **Create Relationships** – Learn how to create and use relationships between objects.
 9. **Create a Custom Profile** – Learn how to create a custom profile to assign the appropriate permissions for a job role.
 10. **Create a Role** – Learn how to create a role in the role hierarchy for a specific job role.
 11. **Create a User** – Learn how to create a new user.
 12. **Create a Validation Rule** – Learn how to create a validation rule to ensure that certain criteria are met.
 13. **Create a Formula Field** – Learn how to create a formula field to display a number based on input parameters.
 14. **Create Roll-Up Summary Fields and Image Formulas** – Learn how to create custom fields to average information stored on a custom object.
 15. **Create a Report and Dashboard** – Learn how to create a report and dashboard to display specific information.
 16. **Create an Approval Process** – Learn how to create a three-step approval process.
 17. **Create a Printable PDF with Force.com Pages** – Learn how to create a printable PDF view.
 18. **Create an Apex Trigger** – Learn how to create an Apex trigger on an object that updates fields on a related object.
 19. **Create a Site** – Learn how to create a Force.com site based on the objects and data in your custom application.
- ❑ **Force.com Connector for CTI** – With the Force.com 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 Force.com 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 Web site.
 - ❑ **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.

For developers

Building Applications Using Force.com and Visualforce (DEV401)

Become a Salesforce.com Certified Force.com Developer! For new Force.com developers who want to start to create custom applications or customize existing salesforce.com applications. You'll learn how to use the declarative capabilities of the Force.com platform to create new applications without coding. The certification exam is included for classroom attendees. *Classroom / 5 days*

:: New: Building Applications Using Force.com and Visualforce (DEV401 Online) – The same content as our classroom-based version but served up in the self-paced online format exclusive to Premier Training customers. The course is organized by major groupings.

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) – This course covers 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.com 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.com.

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.

Apex and Visualforce Controllers (DEV501)

Become a Salesforce.com Certified Force.com Advanced Developer! For experienced developers who want a deep dive into Force.com capabilities to learn to build and deploy Force.com applications. The hands-on curriculum covers using Visualforce, the Apex programming language, and the development-as-a-service (DaaS) capabilities. DaaS includes a rich development environment, team development and debugging best practices, and powerful deployment capabilities. The certification exam is included for classroom attendees. *Classroom / 3 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 covers 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 / 5 days*

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

This course provides students with a minimal background in programming an introduction to object-oriented programming using Force.com code (Apex). Unlike the DEV501 Apex and Visualforce Controllers course, this course assumes students have no previous experience with object-oriented programming. Students will learn the basics of creating Force.com classes and triggers as well as best practices and development methodology to learn how to think like a developer. Although it's impossible to become an expert in object-oriented programming in a week, students will leave with a basic understanding and the tools they need to help them continue learning after leaving the classroom. *Classroom / 5 days*

Release Training (ADM250)

This course is for developers who need to keep up with the new functionality in Custom Cloud 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.
- ❑ **Visualforce Controllers (DEV521 Online)** – This course shows how to combine your previous knowledge of Visualforce pages and Apex classes to create Visualforce controllers. Using controllers, you can start creating advanced interfaces to handle custom data sets or actions for a richer user experiences.
- ❑ **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** – 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** – 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 Tags** – Learn the basics of Force.com pages tag syntax and how tags are similar to HTML, XML, and JavaScript.
 3. **Force.com Pages 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** – 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.
 - ⚡ **Force.com Sandbox** – Examines the uses of record types and their relationship with page layouts to form different experiences for different users.
 - ⚡ **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)

Become a Salesforce.com Certified Implementation Consultant! For consultants ready to take their implementation skills and careers to the next level. Learn to develop solutions and implement the diverse types of client requirements you'll come across as a Salesforce CRM consultant. The course provides tools, best practices, templates, process maps, discovery questions, design considerations, and case studies. The certification exam is included. *Classroom / 3 days*

For end users

Online Training for End Users – Exclusive to Premier Training

- ⚡ **Getting Started and Navigation** – Get up and running quickly on Salesforce CRM with general navigation, key features, and terminology.
- ⚡ **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.
- ⚡ **Integrating with Force.com connector for Microsoft Outlook** – Install the Force.com connector for Microsoft Outlook and synch your activity and contact data with Salesforce CRM.
- ⚡ **Building Your Sales Pipeline with Leads** – Sales reps learn to use leads to build their pipeline.
- ⚡ **Managing Your Data** – 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.
- ⚡ **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 Salesforce CRM Service. 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. **Cases** – 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 to 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 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 Salesforce CRM's 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 Salesforce CRM's 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.
 - ❑ **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.
- ❖ **Mobile CRM** – 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.



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