

## Salesforce Training

Idealist Consulting is proud to extend our webinar series, "Salesforce Basics for the Accidental Admin" to the private sector. This course teaches best practices for utilizing native functionality. Applies to both professional and enterprise editions.

### Structure

- Instructor-led training over GoToWebinar
- Two 90-minute sessions (usually on consecutive days)
- Break for questions every 20 minutes
- Cost: \$100

### Content

*Exact content will depend on audience and instructor but may include the following:*

Navigation and List Views  
Roles: Profiles and Security  
Lead Conversion and Assignment  
Opportunities  
Accounts and Contacts  
Activity Management  
Wrap Up  
Data Import Wizard  
Email Templates  
Mass Email Contacts

Campaigns  
Reporting and Dashboards  
Custom Objects  
Adding Field Values to standard fields  
Creating custom fields  
Page Layouts and Record Types  
Workflow Rules  
Validation Rules  
Support  
Q & A

### Ideal Course Attendee

- New Salesforce users who want to get more out of Salesforce
- Prospects that are considering Salesforce
- Has basic comfort with cloud computing
- Wants to maximize usage of Salesforce for your company

Each training is offered quarterly or by demand. Please contact [webinars@idealistconsulting.com](mailto:webinars@idealistconsulting.com) to be notified when the next course is scheduled.