

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 to be notified when the next course is scheduled.