Faysal Aziz

Salesforce Essentials

FA-0541 · two-day

Mainframe & Enterprise Systems

Introduction

Accounts Team

This two-day intensive training program is designed to empower participants from the accounts department with the knowledge and skills necessary to use Salesforce effectively in their day-to-day operations. The course covers an introduction to the Salesforce environment, basic navigation, data management, and custom reporting, focusing on features and tasks that are most relevant to accounting operations. The program combines theoretical instruction with practical hands-on sessions and assessments, ensuring participants gain not just knowledge but also confidence in using the platform.

Learning outcomes

By the end of the course, participants will be able to:

- Navigate the Salesforce platform confidently.
- Understand the Salesforce data model, particularly as it pertains to accounts and financial operations.
- Create, update, and manage records effectively.
- Use Salesforce's search and report functions to find and analyze data.
- Create and customize reports and dashboards specific to accounting needs.
- Understand Salesforce security as it relates to data access and sharing.

Prerequisites

This course assumes that participants have a basic understanding of:

- General computer skills.
- Basic principles of accounting and financial operations.
- Familiarity with web-based applications.

No prior experience with Salesforce is required.

Training outline

1. Day 1

Introduction to Salesforce

- What is Salesforce?
- Overview of Salesforce for financial operations.
- Understanding the Salesforce interface and navigation.

- Hands-on Practice: Exploring Salesforce Interface

  Working with Data in Salesforce

  - Understanding Objects, Records, and Fields.
  - Creating, editing, and deleting records.
  - Relating records: Looking at Salesforce objects relevant to accounts (Accounts, Contacts, Opportunities, Products, and Price Books).
- Hands-on Practice: Managing Records

2. Day 2

Search and Reporting in Salesforce

- Salesforce Global Search.
- Introduction to Salesforce Reports.
- Customizing Reports.

- Hands-on Practice: Creating and Customizing Reports

  Salesforce Security for Accountants

  - Understanding Profiles, Roles, Permission Sets.
  - Record access and visibility.
- Hands-on Practice: Simulating Data Access and Sharing Scenarios

  Final Assessment and Q&A

  - Participants will be given a scenario to solve using Salesforce, demonstrating the skills learned during the training.
  - Open Q&A and course wrap-up.

Throughout the course, there will be frequent opportunities for participants to ask questions and seek clarifications, ensuring a productive and engaging learning experience.

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