

Domain	
Modules to be covered	Sub topics
Introduction to Salesforce and CRM	Introduction to salesforce Introduction to CRM Salesforce Architecture Salesforce editions Salesforce licences Types of Sandboxes - Development lifecycle in Salesforce Salesforce Object Overview Salesforce Navigation User Creation Lead conversion process
Salesforce object Model	Datatypes in Subjects - I Datatypes in Subjects - II Developing custom objects Relationships in salesforce Formula fields, roll up summary
Modifying Standard UI	Creating custom tabs Creating custom applications Tracking Configuration modifications, Emails, Data Modification Page layouts Related Lists Quick Actions, search layouts etc Introduction to Tools - Dataloader, Workbench
Automation of Business Logic	Validation rules Workflow rule Process builder
Sharing and Security in Salesforce	Record types Security Model - Profiles and Permission sets Sharing Model - OWD, Role hierarchy, Sharing rules, Manual Sharing
Approval Processes and Reports	Approval process Custom report types Reports Dashboards

Proposed Duration(Hrs)
4
5
6
5
5
5
30

Day	Session	Topic
1	1	<b>Overview of Salesforce</b> <ul style="list-style-type: none"> <li>a. CRM functionalities,</li> <li>b. Products of</li> <li>c. Login to Salesforce</li> <li>d. Sales Architecture,</li> <li>e. Lead Conversation, Accounts, Contacts</li> </ul>
	2	<b>Salesforce Navigation</b> <ul style="list-style-type: none"> <li>a. Describe Salesforce (UI) terminology like tags, hover over</li> <li>b. Navigate and perform common tasks using Salesforce applications</li> <li>c. Understanding Chatter</li> <li>d. Understanding UI settings</li> </ul>
2	1	<b>Getting Your Organization Ready for Users</b> <ul style="list-style-type: none"> <li>a. Set up the company profile</li> <li>b. Configure the user interface</li> <li>c. Set up activities and calendars</li> <li>d. Configure search settings</li> <li>e. Set up Chatter</li> </ul>
	3	<b>Setting Up and Managing Users</b> <ul style="list-style-type: none"> <li>a. Manage user profiles</li> <li>b. Create and manage users</li> <li>c. Troubleshoot user login issues</li> <li>d. Understand Salesforce capabilities</li> <li>e. Set up Chatter Free Users and Invites</li> </ul>
3	2	<b>Security and Data Access</b> <ul style="list-style-type: none"> <li>a. Restrict logins</li> <li>b. Determine object access</li> <li>c. Set up record access</li> <li>d. Manage record access with the role hierarchy</li> <li>e. Deal with record access exceptions</li> <li>f. Control access to events</li> <li>g. Manage field-level security</li> </ul>
		<b>Customization: Fields</b> <ul style="list-style-type: none"> <li>a. Administer standard fields</li> <li>b. Create new custom fields</li> <li>c. Create selection fields: picklists and lookups</li> </ul>

4	1	<ul style="list-style-type: none"> <li>d. Create formula fields</li> <li>e. Work with page layouts</li> <li>f. Work with record types and business processes</li> <li>g. Maintain data quality</li> <li>h. Creating Custom button</li> <li>i. Creating Custom Links</li> <li>j. Creating Records with Actions</li> <li>k. Global Action</li> <li>l. Object Specific Action</li> </ul>
	2	<b>Managing Data</b> <ul style="list-style-type: none"> <li>a. Import new records using import wizards</li> <li>b. Update existing records with the data loader</li> <li>c. Mass transfer records between users</li> <li>d. Back up data with a weekly export</li> <li>e. Mass delete records</li> </ul>
5	2	<b>Reports and Dashboards</b> <ul style="list-style-type: none"> <li>a. Run and modify reports</li> <li>b. Create new reports with the report builder</li> <li>c. Filter reports</li> <li>d. Summarize report data with formulas and visual summaries</li> <li>e. Print, export, and email reports</li> <li>f. Build dashboards</li> </ul>
	3	<b>Automation</b> <ul style="list-style-type: none"> <li>a. Email Templates</li> <li>b. Set up workflow rules and Process Builder</li> <li>c. Automate leads and cases</li> <li>d. Extending Salesforce _Corporate Template</li> </ul>
6		<b>Mini Case study</b>