

Sales Force CRM (SFDC)

Consulting & Administration Course Details

Introduction

01. Cloud Computing

- Introduction
- IaaS
- PaaS
- SaaS

02. CRM Overview

- Introduction
- CRM History
- On-Premise CRM
- On-Demand CRM

03. Salesforce CRM

Introduction
Salesforce History
Products of Salesforce

04. Environments & Landscapes

Environment:

- Introduction
- Lightning Platform
- Production
- Sandboxes
 1. Introduction
 2. SandboxTypes
 3. Limits

Landscapes:

- Development

- Sandbox
- Quality
- Testing
- Staging
- Prototype(V/P Prod)
- Production

05. Salesforce Editions

- Basic
- Group
- Essentials
- Professional
- Enterprise
- Unlimited
- Developer
- Edition White sheets

06. Salesforce Licenses

- Standard User Licenses
- Permission Set Licenses
- Features Licenses
- Chatter User Licenses
- Communities User Licenses
- Service Cloud Portal User Licenses
- Sites and Site.com User Licenses
- Authenticated Website User Licenses

07. Trail Account & Developer Account

Consulting

Marketing Cloud

08. Campaign:

- Campaign Management
- Campaign Types
- Campaign Hierarchy
- Campaign Executions.

09. Lead:

- Lead Management

- Lead Cycle/Stages.
- Lead Conversions.
- Lead Assignment Rules.
- Auto Response Rules
- Web-to-Lead
- ELM (External List Management)
- Lead Members

- Activity & Task Management

10. Customer Master – Account & Contacts

Account & Contacts:

- Personal Account
- Organization Account
- Partner Account
- Account Team Member
- Account to Contact Link (1:N)

Sales Cloud

11. Opportunity Management

- Sales Stages/Sales Pipeline Management (Sales Cycle)
- Competitors
- Contact Roles
- Partners
- Approvals
- Forecasting
- Line Items
- Quote
- Alerts – Big Deal, Stagnant Deal, Snail Deal

12. CPQ

- CPQ introduction
- Price Book
- Price Book – Product Master Link
- Product Master
- Quote
- Quote Line
- Solution Documentation

- Quote – Opp Sync
- Quote Versioning
- Quote PDF
- Email Quote

13. CLM (Contracts)

- CLM introduction
- Lifecycle
- Contract Rules
- Contracts Alerts

14. Order Management

- Order Line Items
- Order Flow
- Order Activation

15. Asset Management

Service Cloud

16. Case Management

- Case Queue
- Assignment Rules
- Escalation Rules
- Escalation Groups
- Web-to-Case
- Email-to-Case
- Case Alerts & Auto Response Rules

17. Solutions

- Solution with KB Articles

Administration

18. User Management

- Profiles
- Roles
- User
- Login Issues
- Password Policies
- Network Access
- Permission Set

- Login Access policies
- Queue
- Groups
- Roles (Organization Hierarchy)
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19. Territory Management

- Territory Creation
- Territory Chart, Rules, Assignments,

- Inherited Rules

- Field Level Security
- Profile
- Permission Set

20. Company Profile

- Business Hrs & Holidays
- Fiscal Years
- Language Setting
- Currency Setting
- Company Information
- Company Calendar

- Organization Level Security

21. Data Management

- Import Wizard
- Data Validation Rules
- Data Mapping
- APEX Data Loader – Insert, Update Upsert, Delete, Export, Export All
- Exporting Overview with custom Filter, Conditions and Formulas
- Export Scheduling
- Mass Delete
- Conditional Deletes
- Mass Transfer, Condition, Filters
- Approval Transfers
- Import custom object records using the Data Loader
- Storage Management
- Duplicate Rules
- Matching Rules
- Big Objects

22. Data Security

- Object Level security
 - Profile Level
 - Permission Set
- Record Level Security
 - OWD
 - Role Hierarchies
 - Sharing Rules
 - Owner Based sharing
 - Criteria Based Sharing
 - Manual Sharing
 - Apex Sharing
 - Team Sharing
 - Territories
 - Profile Level
 - Permission Set

23. Email Management

- Exception Email
- Templates
 - Classic
 - Lightning
- Email Attachments
- Compliance BCC
- Email Delivery Settings
- Email Footers
- Email to Salesforce
- Organization Wide Addresses

24. Desktop and Mobile App Administration

- Salesforce 1 – Branding, Settings
- Mobile Notification
- Mobile Dashboard
- Sales Force Offline Briefcase Profile
- Offline Data Security, Access, Limits, Conditions, Filters
- Sales Force Desktop Outlook Management
- Out Look Profile , Sync Settings, Mappings, Data, HTTPS Etc.

25. Application

- Standard Application
- App Manager
- Custom Application
- Console Application
- Custom App Creation
 - Classic
 - Lightning
 - Limits

26. Objects

- Introduction
- Standard Objects
- Custom Objects
- Custom object Creation
 - Standard Navigation
 - Schema Builder

- Limits

27. Tabs

- Object Tab
- Web Tab
- VF Tab
- Lightning Tab

28. Fields & Relationships

- Introduction
- Standard Fields
- Custom Fields
- Data Types
- Field Dependency
- Formulae
- Relations
 - Master-Detail
 - Junction object
 - Lookup Relation
 - Hierarchical
 - External Relation
- External Objects

29. Validation Rules

- IF Rules
- Conditional AND , OR rules
- Arithmetic Rules
- Text Logic Rules

30. Layouts and Forms

- Search Layouts
- Page Layouts
- Mini Page Layout
- Record Types
- Compact Layouts
- Layouts Assignments

Automation

31. Workflows

- Introduction
- Evaluation Criteria
- Immediate Actions
- Time Bound Actions
- Email Template
- Email Alerts

- Field Update
- Task
- Outbound Message
- Limitations

32. Approval Process

- Introduction
- Entry criteria
- Single Step Approval
- Multiple Step Approval
- Parallel Approval Process
 - Unanimous Approval
 - First Response Approval
- Limitations
- Approvals Action

33. Process Builder

- Conditions and Criteria
- Immediate Action
- Schedule Actions

34. Flow Builder (Interview)

- Interactions
 - Screens
 - Actions
 - Sub Flows
- Logics
 - Assignments
 - Decision
 - Loops
- Data
 - Create
 - Update
 - Get
 - Delete

Wave Analytics - Analytical Cloud

35. Reports

- Introduction
- Standard Reports
- Custom Reports
- Report Folders
- Custom Folders
- Report types

- Standard Report Type
- Custom Report Type
- Report Formats
 - Tabular
 - Summary
 - Matrix
 - Join
- Bucketing Reports
- Arithmetic Function
- Scheduling
- Export
- Reporting Snapshot

36. Dashboard

- Dashboard components

- Dashboard Properties
- Dynamic Dashboards

37. Monitoring

- Organization Data ,Debug logs and Email Logs
- Login History ,View Setup Audit Trail
- Queue ,Outbound messages
- Schedule Jobs , Apex Jobs ,Bulk Data Load Jobs

38. Communities

- Survey
- Chatter
- Social Networking