SALESFORCE CRM TRAINING

SALESFORCE CRM ADMINISTRATION

CLOUD COMPUTING SERVICES AND CRM

- Definition of Cloud Computing
  a) What is Cloud Computing.
  b) Advantages of Cloud computing
  c) Overview On Cloud Services
  d) Saas(Software as a Service)
  e) PaaS(Platform as a Service)
  f) IaaS(Infrastructure as a Service)
  g) IaaS vs SaaS vs PaaS

- Types of Clouds
  a) Public Cloud
  b) Private Cloud
  c) Hybrid Cloud

- Origin of CRM
  a) Introduction
  b) What is CRM
  c) CRM History
  d) On-PremiseCRM
  e) On-DemadCRM
  f) Legacy CRM Systems

- Streamline Business Process

DEFINITION OF SALESFORCE AND IT'S PRODUCTS:

- What is Salesforce
- Importance of CRM and Solutions
- Grouth of Revenue using CRM
- Comparison of Salesforce CRM with other CRM Products
- Salesforce Products
  a) Sals cloud
  b) Service cloud
  c) Marketing cloud
  d) Community Cloud

  e) Lightning Platform
  f) Database.com
  g) Data.com
  h) Chatter

- Environments And Sandbox Types
  a) Production Environment
  b) Developer Environment
  c) Testing Environment

- **Salesforce Editions:**
  a) Basic
  b) Group
  c) Essential
  d) Professional
  e) Enterprise
  f) Unlimited
  g) Developer

- **Salesforce Licenses:**
  a) Standard User Licenses
  b) Chatter User Licenses
  c) Communities User Licenses
  d) Service Cloud Portal User Licenses
  e) Sites and Site.com User Licenses
  f) Authenticated Website User Licenses

SALES CLOUD GENERIC BUSINESS PROCESS:

- Features of Sales Cloud
- Products
- Campaign
- Lead
  a) Lead Management
  b) Assignment Rule
  c) AutoResponse Rule
  d) Lead Process
  e) Web-to-Lead
  f) Lead Members
- Account

- Opportunity
- Contact
- Contract
- QuoteManage
- Order
- Forecast
- Entitlement

CPQ:

- CPQ Introduction
- Price Book
- Product Master
- Quote and QuoteLine
- Email Quote
- Quote Version

SERVICE CLOUD CUSTOMER SERVICE:

- Features of Servicecloud
- Case
- Case Alerts
- Case Queue
- Assignment Rules
- Solution
- Public Knowledge Base
- Web-To-Case
- Email-to-Case
- Self-Service Portal
- Escalation rules

COMPANY INFORMATION:

- Creating Company Profile
- Setting Fisca Year
- Setting Business Hours
- Setting Holidays
- Setting Language
- Identifying Edition

SALESFORCE FORCE.COM PLATFORM:

- Creating Trail Account
-

Creating Developer Account
- Setup-Personal Setup
- About Administartion Setup
- Standard Applications
- Creating Custom Application(Design)
- Standard Tabs
- Creating Custom Tabs
- Standard Objects
- Creating Custom Objects
- Creating Custom Fields
- Creating Custom Picklist
- FieldDependencies

USER MANAGEMENT:

- Creating users
- Creating Roles
- Creating Custom Profiles
- Discussion on Standard Profiles
- Creating Permission Sets
- Creating Public Groups
- Creating Queues
- Login History
- Login Issues
- Password Policies
- Network Access
- Login Acces Policies

RELATIONSHIPS IN SALESFORE:

- Lookup Relationship
- Master-Detail Relationship
- Many to many Rlationships
- Junction Object
- Rollup Summary Felds
- Hierarchical
- External Relationship
- ReaTime Scinarios

VALIDATIONS AND FORMULAS:

- Overview of validation
- Creating Validation Rule

- Functions in Validation
- Conditional AND,OR
- Text and Arthematic

OBJECT LEVEL SECURITY MODEL(TABLE):

- Profile Level
- Permission Set Level

FIELD LEVEL SECURITY :

- Profile Level
- PageLayout Security
- Permission Set Security

RECORD LEVEL SECURITY :

- Overview of Record Level security
- Organization-Wide-Default
- Sharing Rules
- Grant Access Using Hierarchies
- Internal Access
- External Access
- Mannual Sharing
- Apex Sharing
- Owner Based Sharing Rule
- Criteria Based Sharing Rule
- Both Usage of Profile and OWD
- RealTime Scenarios

WORKFLOWS AND APPROVALS:

- Overview of Workflows
- Email Alerts
- Tasks
- Field Updates
- Outbound Messages
- Time Dependent Workflow Actions
- Order of Execution
- Approval Process Definition
- Dynamic Approval Process
- Multi-Step Approval Process
- Parallel Approval Process
-

Approval Process Actions
- Real Time Scenarios

PROCESS BUILDER:

- Introduction
- Actions
- Conditions and Criteria
- Immediate Action
- Scheduled Action

DATAMANAGEMENT WITH SFDC:

- Overview Import wizard
- Limitations on Import Wizard
- Data Export
- Import Objects
- .CSV File usage in salesfore
- Import Data into Salesforce
- Data Loader
  a) Overview
  b) Operations
  c) Limitations
  d) Installation
  e) Mapping with Fields
  f) Upsert Data
  g) Batch Process
  h) Exporting With Custom Filter
  i) Duplicate Rules
  j) Matching Rules
  k) Storage Management
  l) Big Objects
- Mass Transfer Records
- Mass Delete of Records

SECURITY SETTINGS:

- Single-Sign-on settings
- Session Settings
- Password Policies
- Identity Provides
- Login Access
- Identity Connect

- Email Admin Setup

EMAIL ADMINISTRATION:

- Email Attachments
- Templates
- Email Attachments
- Email Footers
- Deliverability
- Deliveriy Settings
- Organization-Wide Addresses
- Setting Email Footers
- Compliance BCC Email

COMMUNITIES:

- what is communities.
- salesforce Communities?
- Types of Communities.
- Enable Salesforce Communities.
- Creating Community.
- Enable Global header for Communities.
- Adding Tabs to the Community.
- Adding Member To your community.
- Community Users.

REPORTS AND DASHBOARDS:

- Importance of Reports
- Discussion On Standard Report
- Creating Custom Report
- Creating Tabular Report
- Creating Summary report
- Creating Matrix Report

- Creating Joined Report
- Creating Report Types
- Applying Filters on Report
- Run Report
- Export Report
- Create Dashboard
- Report Folders
- Custom Folders
- Fetching Dashboard in to Visualforce

MONITORING:

- Debug Logs
- Email Logs
- Audit Trail
- View Setup
- Scheduled Jobs
- Apex Jobs
- Bulk Data

RESOLVING PROJECT ISSUES:

- Overview on Types of Projects
- Issue Capturing and Priority
- Isuue Resolving
- Issue escalation
- How RealTime Issues
- Overview on Outlook Email
- Code Checking
- BluePrint
- Agile Methodology
- How to Clear RoadBlocks
- Office Communicator(O.C)

SALESFORCE CRM DEVELOPMENT

PROJECT RELATED:

- Resolving User Issues In Project
- Importance of User In Application
- Real time project explanation
- Real time Project Business Process
- Project Development Life Cycle
- Project Management Tools
- Sandbox and UAT
- Change Set
- Deployment
- Production

BEFORE START DEVELOPMENT:

- Enable Development Mode
- MVC Architecture
- Developer Console Usage
- Query Editor Usage
- Execute Anonymous Window
- Create Class Using Developer Console
- Create Visualforce Using Developer Console
- Test and Debug Using Developer Console
- Installing Eclipse

VF PAGES: VISUALFORCE PAGES:

- Comparisson With HTML Tags
- Create VF Using URL
- Create VF Using Developer Console
- Create VF Using Standard Navigation

DATA SOURCES IN VISUALFORCE:

- Apex Class Variables
- Parameters Using URL
- Global Standard Objects or Custom Objects
- Static Data

DEVELOPER CONSOLE:

- Query Editor Anonymous
- Window Logs
- Visual force Pages
- Apex Classes

PAGEBLOCK TAGS:

- Pageblock
- PageBlockSection
- PageBlockSectionItem
- PageBlockButton and Location
- CommandButtons and Actions
- CommandLink

INPUT COMPONENTS:

- InputText
- InputField
- InputSecret
- InputHidden
- InputFile

SELECT COMPONENTS:

- SelectOption
- SelectOptions
- SelectCheckBox
- SelectRadio

MESSAGE TAGS:

- PageMessage
- PageMessages

PANEL TAGS:

- PanelBar
- PanelBarmItem
- PanelGrid
- PanelGroup

STANDARD CONTROLLER:

- SObject in VF

wInput Fields
- Output Fields
- Inline Edit Support
- Sobject Standard Actions

OTHER VF TAGS:

- Column
- CommandLink
- Detail
- Form
- Iframe
- Image
- IncludeScript
- Include Page
- ListViews
- Repeat
- Tab and Tab Panel
- Render,Rerender,RenderAs
- Passing parameters
- Creating VF Tabs
- Realted List
- Enhanced List

LIST VIEWS:

- Creating Views
- PageBlockTable ListView
- DataTable
- DataList
- Repeat
- RecordSetVar
- Facet

SELECT COMPONENTS:

- selectOption
- selectOptions
- selectList
- selectCheckbox
- selectRadioButtons

ACTION COMPONENTS IN VISUALFORCE:

- ActionSuppot
-

ActionFunction
- ActionStatus
- ActionRegion
- ActionPoller

REALTIMETOPICSWITHVISUALFORCE:

- Usage of Static Resource In VF
- Overriding Buttons,Links,and Tabs with VF
- Dynamic Visualforce Binding
- Integrating Email with Visualforce
- VisualforceTemplates
- Generate Visualforce page as PDF,WordDocument
- Real Time Scinarios

USAGE OF CSS IN VISUALFORCE:

- Create CSS Class
- InternalCSS
- External CSS
- StaticResource In ExternalCSS
- Boostrap Usage in Visualforce
- Realtime Scinarios

USAGE OF JAVASCRIPT:

- JS Functions Usage in Visualforce
- JS DOM Usage in visualforce
- JS Events Usage in Visualforce
- JS Validations In Visualforce
- Internal JavaScript
- External JavaScript
- Realtime Scinarios

USAGE OF JQUERY IN VISUALFORCE:

- Using Less Code In Visualforce
- Jquery StaticResorces
- URL Plugins
- AutoComplete

USAGE AJAX IN VISUALFORCE:

- Overview on Connectios

- Ajax SOQL
- Ajax DML

OOPS: OBJECT ORIENTED PROGRAMMING:

- Fundamentals and Properties
- Lexicals
- Keywords
- Variables
- Identifiers
- Data types
- Access Modifiers
- Class
- Methods
- For-Loops
- Conditional Statements
- Exceptiopnal Statements
- Class syntax writing
- Constructing Method
- Overloading
- Reference Varibles
- Try-Catch
- Setter Method
- Getter method
- Constructors
- Class Properties
- Return Statements
- Inheritance
- Abstarction
- Polymorphism
- Encapsulaion
- Creating Wizard Class
- Wrapper Class
- Usage Of properties in sfdc

APEX CLASSES: COLLECTIONS:

- List class
- Set class
- Map class
- Arrays
- Wrapper
- Advanced Example snippets

SOQL AND SOSL:

- Overview on SOQL,SOSL
- Fetching Records on VF Using SOQL
- Inserting Records from VF to Salesforce
- Debug Logs
- Static SOQL
- Dynamic SOQL
- Relational SOQL(p-c,c-p)
- Functional SOQL(Aggregate,Date)
- Creating Interfaces Using SOSL
- GoverningLimits on Apex
- RealTime Project Scinarios

DML OPERATIONS:

DML STATEMENTS VS DATABASE CLASS METHODS:

- Database DML Operations
- Insert Statement
- Update Sattements
- Upsert Statement
- Delete Statements
- Undelete Statements
- Merge Statements
- Rollback operations
- SavePoint In DML
- Realtime Rroject Scenarios

CONTROLLERS IN APEX:

- Standard Controller
- Standard Set Controller
- Custom Controller
- Controller Extensions

SCHEMA PROGRAMMING:

- ObjectType
- SobjectFieldType
- FetchingSObjectAndField
- Selected Options
- Fetching Picklist

EMAIL SERVICE USING APEX CLASS:

- ➤ Overview Of Email Sending
- ➤ Outbound Email Service
- ➤ Inbound Email service
- ➤ Email Service Using Templates
- ➤ Sending PDF as Attachments
- ➤ Sending VF Attachments
- ➤ Mass Email Message Sending
- ➤ Creating Methods for Sending Emails
- ➤ Syntax for Send Emails
- ➤ Limits
- ➤ Logs and Debugging
- ➤ Realtime Scenarios

CUSTOM SETTING:

- ➤ Introduction
- ➤ List Custom setting
- ➤ Hierarchial Custom Setting
- ➤ Controlling Execution Of Validations

ASYNCHRONOUS APEX:

- ➤ Future Method-Long Running
- ➤ Queueable Apex-Chain Jobs
- ➤ Batch Apex-LargeDataVolumes
- ➤ Schedule Apex-Run On Schedule

SCHEDULE APEX:

- ➤ Implemantation
- ➤ Invoking Future Method from Schedule
- ➤ Schedule Using Point and click
- ➤ Schesule Using Code Customization
- ➤ Cron Expression
- ➤ Cron Trigger
- ➤ Invoke batch,schedule and future methods from Schedule
- ➤ :Limits

BATCH APEX:

- ➤ Iterable Class
- ➤ Iterator
- ➤

Database.QueryLocator
- ➤ Database.GetQueryLocator
- ➤ Batchable Context
- ➤ Start Method
- ➤ Execute Method
- ➤ Finish Mehtod
- ➤ Sending Email From finish Method
- ➤ Database.BatchableContext
- ➤ Debug Batch Apex
- ➤ Creating Future Methods in Batch Apex
- ➤ Implememnting Database.AllowCallouts
- ➤ Call Batch In a Batch
- ➤ Future,QueuableFrom Batch
- ➤ Serialize Batch By Batch
- ➤ RealTime Scenarios

QUEUEABLE APEX:

- ➤ Queueable Interface
- ➤ Changing Of JObs
- ➤ Invoking Future,BatchAndSchedule
- ➤ Implementation
- ➤ Scenarios

FUTURE METHODS:

- ➤ LongRunningOperators
- ➤ FutureInvokeCalloutsTrigger
- ➤ @future Annotations
- ➤ ApexJObs
- ➤ MIxedDML Expressions

EXTENSIONS:

- ➤ Pagenation
- ➤ Creating CustomButtons
- ➤ Creating ListViewButtons
- ➤ Overriding StandardButtons
- ➤ StandardController
- ➤ StanadardSetController
- ➤ Overriding StandardTabs

APEX TRIGGERS:

- ➤ Overview On Triggers

- Trigger Events
- Before Triggers
- After Triggers
- Insert Triggers
- Update Triggers
- Delete Triggers
- Undelete Triggers
- Trigger.New
- Trigger.Old
- Trigger.NewMap
- Trigger.OldMap
- Recursive Triggers
- Validation Rule with Trigger
- Workflow with Trigger
- Invoking Batch Apex,callouts from trigger
- Invoking Schedule,Future Methods from Trigger
- RealTime Scenarios on Each Topic

TEST CLASS:

- Overview on Test classes
- StartTest,StopTest
- Test Class On DMLOperations
- Test Class on Apex class
- Test Class on Batch APEX
- Test Class On Schedule Apex
- Test Class on Triggers

DEPLOYMENTS:

- Creating Sandbox
- Outbound ChangeSets
- InboundChangeSets
- DeploymentUsingEclipse
- DeploymentUsing

INTEGRATION AND WEB SERVICES

- What is Integrations
- Definition Of WebServices.
- What is WSDL.
- Types of integrations:
    - what is call ?
    - call in
    - call out
    - Different methdoloies.

WSDL:

Standard WSDLs
Enterprise(Strongly typed) Partner
WSDL(Loosely Typed) Custom Apex
WSDL

XML:

XMLParsers
XML Stream
XML DOM

- Differnce between seesion Header & SessionID
- Types of API(force.com APIs,Streaming API and Bulk API,Meta Data api) SOAP & REST.
- Wrapper classes usability in SOAP Call In Intergration.
- Integrating standard WSDL of SOAP
- Exposing Apex classes as SOAP web Services
- writing more efficient SOAP Apex Web Services & Testing WSDL
- SOAP Call outIntegration
- Consuming external SOAP WSDL files into Salesforce.
- Generating Apex class code from Partner WSDL and Enterprize WSDL.
- Complete Analyzation while parsing external WSDL files into Saleforce
- Real time Call In Integration using SOAP and WSDL Files(salesorce to salesforce)

REST CALL API:

- Call in integration using standard rest resources
- exposing apex classes as rest web services & rest annotations

    HTTPclasses:
    http callouts,
    http,httprequest
    httpresponse

- How to implement callouts from triggers,unit test classes for callouts
- Practiing more efficent rest apex web services
- Scenario base rest call outintegration
- JSON Parser Syntax
- Parsing JSON Data
- JSON Serialization
- JSON Parser and JSONDeserialization
- Real Time Call In Integration using Rest
- Real Time Call Out Integration usingRest
- Feqquently Used Integration Tools: Force.com Workbench(workbench.developerforce.com) and Rest API
- Custom Setting:
    List custom settings Hierarchy
    Custom Setting,
- Deployment: Quick Deployment,Change sets

MIXED DML ERRORS:

- Advanced Security, Assigining Profiles.
- Organization wide defaults,Sharingrules, Criteria Based and Ownerbased
- Setup Duplicate Management, Create or Edit Duplicate rules
- Create or Edit Duplicate rules,Matching Rules
- Custom Lables & Translation Workbench, Custom Labels
- How to Enabling TranlationWorkbench

- ➢ Testing SOAP Services and Callouts
- ➢ Testing Rest Services and Callouts
- ➢ Chatter API
- ➢ Streaming API
- ➢ Metadata API
- ➢ Bulk API

LIGHTNING COMPONENTS AND BUILDER:

- ➢ Introduction to lightingcomponents
- ➢ Components and javascript conrollers
- ➢ Apex Components
- ➢ Creating Components
- ➢ Creating Component Attributes