

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-Premise CRM
 - e) On-Demand CRM
 - f) Legacy CRM Systems
- Streamline Business Process

DEFINITION OF SALESFORCE AND IT'S PRODUCTS:

- What is Salesforce
- Importance of CRM and Solutions
- Growth of Revenue using CRM
- Comparison of Salesforce CRM with other CRM Products
- Salesforce Products
 - a) Sales 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 Fiscal Year
- Setting Business Hours
- Setting Holidays
- Setting Language
- Identifying Edition

SALESFORCE FORCE.COM PLATFORM:

- Creating Trail Account

- Creating Developer Account
- Setup-Personal Setup
- About Administration Setup
- Standard Applications
- Creating Custom Application(Design)
- Standard Tabs
- Creating Custom Tabs
- Standard Objects
- Creating Custom Objects
- Creating Custom Fields
- Creating Custom Picklist
- Field Dependencies

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 Access Policies

RELATIONSHIPS IN SALESFORCE:

- Lookup Relationship
- Master-Detail Relationship
- Many to many Relationships
- Junction Object
- Rollup Summary Fields
- Hierarchical
- External Relationship
- Real Time Scenarios

VALIDATIONS AND FORMULAS:

- Overview of validation
- Creating Validation Rule

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

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
- Manual 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

DATA MANAGEMENT WITH SFDC:

- Overview Import wizard
- Limitations on Import Wizard
- Data Export
- Import Objects
- .CSV File usage in salesforce
- 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
- Delivery 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
- Issue 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
- PanelBarItem
- PanelGrid
- PanelGroup

STANDARD CONTROLLER:

- SObject in VF



- Input Fields
- Output Fields
- Inline Edit Support
- Subject 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
- Related 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:

- ActionSupport

- ActionFunction
- ActionStatus
- ActionRegion
- ActionPoller

REAL TIME TOPICS WITH VISUALFORCE:

- Usage of Static Resource In VF
- Overriding Buttons, Links, and Tabs with VF
- Dynamic Visualforce Binding
- Integrating Email with Visualforce
- Visualforce Templates
- Generate Visualforce page as PDF, Word Document
- Real Time Scenarios

USAGE OF CSS IN VISUALFORCE:

- Create CSS Class
- Internal CSS
- External CSS
- StaticResource In External CSS
- Bootstrap Usage in Visualforce
- Realtime Scenarios

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 Scenarios

USAGE OF JQUERY IN VISUALFORCE:

- Using Less Code In Visualforce
- JQuery StaticResources
- URL Plugins
- AutoComplete

USAGE AJAX IN VISUALFORCE:

- Overview on Connections



- 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
- Exceptional Statements
- Class syntax writing
- Constructing Method
- Overloading
- Reference Variables
- Try-Catch
- Setter Method
- Getter method
- Constructors
- Class Properties
- Return Statements
- Inheritance
- Abstraction
- Polymorphism
- Encapsulation
- Creating Wizard Class
- Wrapper Class
- Usage Of properties in sfmc

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
- Governing Limits on Apex
- RealTime Project Scenarios

DML OPERATIONS:

DML STATEMENTS VS DATABASE CLASS METHODS:

- Database DML Operations
- Insert Statement
- Update Statements
- Upsert Statement
- Delete Statements
- Undelete Statements
- Merge Statements
- Rollback operations
- SavePoint In DML
- Realtime Project 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:

- Implementation
- Invoking Future Method from Schedule
- Schedule Using Point and click
- Schedule 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 Method
- Sending Email From finish Method
- Database.BatchableContext
- Debug Batch Apex
- Creating Future Methods in Batch Apex
- Implementing Database.AllowCallouts
- Call Batch In a Batch
- Future,QueueableFrom 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:

- Pagination
- Creating CustomButtons
- Creating ListViewButtons
- Overriding StandardButtons
- StandardController
- StandardSetController
- 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 Web Services.
- 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 out Integration
- 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 efficient rest apex web services
- Scenario base rest call outintegration
- JSON Parser Syntax
- Parsing JSON Data
- JSON Serialization
- JSON Parser and JSON Deserialization
- Real Time Call In Integration using Rest
- Real Time Call Out Integration usingRest
- Feqqently Used Integration Tools: Force.com Workbench(workbench.developerforce.co m) and Rest API
- Custom Setting: List custom settings Hierarchy Custom Setting,
- Deployment: Quick Deployment,Change sets

MIXED DML ERRORS:

- Advanced Security, Assigning Profiles.
- Organization wide defaults,Sharing rules, 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 Tranlation Workbench



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

LIGHTNING COMPONENTS AND BUILDER:

- Introduction to lightning components
- Components and javascript controllers
- Apex Components
- Creating Components
- Creating Component Attributes

