

# 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) laaS(Infrastructure as a Service)
  - g) laaS 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
- Database.com
- 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
- **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

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- 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 Service cloud
- 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 Administration 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

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- > 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

### **DATA MANAGEMENT WITH SFDC:**

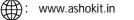
- Overview Import wizard
- Limitations on Import Wizard
- Data Export
- Import Objects
- > .CSV File usage in salesfore
- > Import Data into Salesforce
- Data Loader
  - a) Overview
  - b) Operations
  - c) Limitations
  - d) Installation
  - e) Mapping with Fields
  - f) Upsert Data
  - g) Batch Process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

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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)

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# 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

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- Input 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

# REALTIMETOPICS WITH VISUALFORCE:

- 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

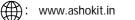
### **USAGE OF JQUERY IN VISUALFORCE:**

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

#### **USAGE AJAX IN VISUALFORCE:**

Overview on Connectios

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- 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 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

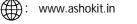
# **CONTROLLERS IN APEX:**

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

#### **SCHEMA PROGRAMMING:**

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

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#### **EMAIL SERVICE USING APEX CLASS:**

- Overview Of Email Sending
- Outbound Fmail 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
- 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
- Implementing Database. Allow Callouts
- Call Batch In a Batch
- Future, Queuable From Batch
- Serialize Batch By Batch
- RealTime Scenarios

# **QUEUEABLE APEX:**

- Queueable Interface
- Changing Of JObs
- Invoking Future, Batch And Schedule
- **Implementation**
- **Scenarios**

#### **FUTURE METHODS:**

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

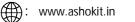
# **EXTENSIONS:**

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

# **APEX TRIGGERS:**

Overview On Triggers

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- > 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





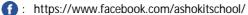


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# **INTEGRATION AND WEB SERVICES**

- > 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 (sales orce to sales force)

#### **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
- Practing more efficent 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 using Rest
- Fegguently 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, Assigining Profiles.
- Organization wide defaults, Sharing rules, Criteria Based and Ownerbased
- Setup Duplicate Management, Create or Edit Duplicate rules
- Create or Edit Duplicate rules, Matching
- Custom Lables & Translation Workbench, **Custom Labels**
- ➤ How to Enabling Tranlation Workbench

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

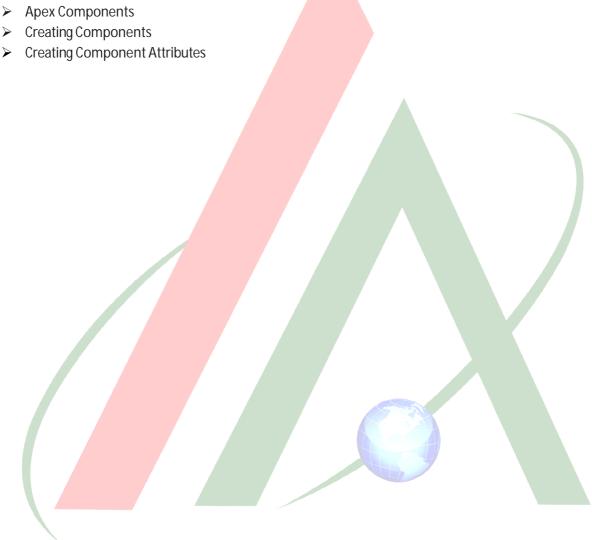
### **LIGHTNING COMPONENTS AND BUILDER:**

Introduction to lighting components

Components and javascript conrollers

> Apex Components





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