

SalesForce CRM Training

Salesforce **Customer Relationship Management** usually pronounced as Salesforce CRM which has began with the vision of re-inventing CRM. The major role of Salesforce is to run entirely in the cloud storage and there is no need of setup costs which helps your workers to do work from any device just with an internet connection either it may be a smartphone, tablet, laptop or PC. Salesforce CRM is easy to operate for small business as well as large business organizations. It not only starts and end with CRM for sales and marketing but also enables you to manage all interactions with your customers.

Objectives of the Course

- Salesforce CRM software and its features.
- Implementing automation, security and debugging data.
- To learn Standard List Controller and Configure the user interface.

Who can attend This Course

- There are no certain pre-requisites to take the [Salesforce CRM](#) course.
- Who should do the course: App Builders.
- Developers System, Administrators, Sales Managers, Sales Executives.

Prerequisites to learn Salesforce

- [Core Java](#) or Any Programming Language

SalesForce CRM Course Duration

- 60 Days.

SalesForce CRM Course Content

Definition Of Cloud Computing And Types

- Definition of cloud computing
- On-demand advantages of Cloud computing
- Services of Cloud computing
- SaaS(Software as a Service)
- PaaS(Platform as a Service)
- IaaS(Infrastructure as a Service)
- Types of Clouds
- Public Cloud
- Private Cloud
- Hybrid Cloud
- Community Cloud

Definition Of Salesforce And It's Products

- Importance of Salesforce
- Importance of CRM and Solutions
- Growth of Revenue using CRM

- comparison of Salesforce CRM with other CRM Products
- Salesforce Products
- Salesforce Features and Edition Limits

Salesforce Administration

Sales Cloud-Generic Business Process

- Features of Sales Cloud
- Products
- Campaign
- Lead
- Account
- Opportunity
- Contact
- Contract
- QuoteManage
- Order
- Forecast
- Entitlement

Service Cloud and Customer Service

- Features of Service cloud
- case
- Solution
- Public Knowledge Base
- Web-to-case
- Self-Service Portal
- Escalation rules

Company Information

- creating Company Profile
- Setting Fiscal Year, Business Hours
- Setting Holidays and Language
- Identifying Edition

Salesforce-Force.Com Platform

- Creating User Login Credentials
- Setup-Personal Setup
- About Administration Setup
- Standard Applications, Tabs and Objects
- Creating Custom Application(Design), Custom Objects and Custom Tabs
- Creating Custom Fields Using DataTypes and Picklist and Dependencies

Manage Users

- Creating users and Roles
- Creating Custom Profiles

- Discussion on Standard Profiles
- Creating Permission Sets and Public Groups and Queues
- Login History

Relationships In Salesforce

- Lookup Relationship
- Master-Detail Relationship
- Many to many Relationships
- Junction Object
- Rollup Summary Fields
- RealTime Scenarios

Applying Validations And Formulas

- Overview of validation
- Creating Validation Rule
- Apply Formula in Validation
- PageLayout on Objects
- Mini PageLayout
- Search Layout
- Record Type
- Field Level Security on Layout

Object Level Security Model (Table)

- Profile Level
- Permission Set Level

Field Level Security Model (Column)

- Profile Level
- Page Layout Security
- Permission Set Security

Record Level Security Model-Sharing Settings(Row)

- Overview of Record Level security
- Organization-Wide-Default
- Sharing Rules
- Grant Access Using Hierarchies
- Internal Access
- External Access
- Manual Sharing
- Owner 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

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
- Mass Transfer Records and Delete of Records

Process Builder

- Overview of Process Builder
- Working with Process Builder
- Workflows With Process Builder

Community Creation

- Customer community
- Partner Community
- Creating User On Community
- Self Registration

Security Settings

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

Email Administration

- Deliverability
- Test Deliverability

- Organization-Wide Addresses
- Setting Email Footers
- Compliance BCC Email

Administrative Integration

- Overview on Declarative(no-code) and Programmatic (coding)
- Integrating SFDC to SFDC, SFDC to Excel and SFDC to Facebook

Reports And Dashboards

- Importance of Reports
- Discussion On Standard Report
- Creating Custom Report, Tabular Report, Summary report, Matrix Report
- Creating Joined Report and Report Types
- Applying Filters on Report
- Run Report
- Export Report
- create Dashboard
- Fetching Dashboard in to Visualforce

Resolving Project Issues

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

Salesforce Development

Project Related

- Resolving User Issues In Project
- Importance of User In Application
- Real time project explanation and 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 and Visualforce Using Developer Console
- Test and Debug Using Developer Console
- Installing Eclipse

Visualforce Pages

- Comparison With HTML Tags
- Create VF Using URL, Developer Console, Standard Navigation and Eclipse

Data Sources In Visualforce

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

Pageblock Tags

- Pageblock
- PageBlockSection, SectionItem
- PageBlock Button and Location
- CommandButtons and Actions

Input Components

- InputText, InputField and InputSecret
- InputHidden
- InputFile

Select Components

- SelectOption
- SelectOptions
- SelectCheckBox
- SelectRadio

Message Tags

- PageMessage
- PageMessages

Panel Tags

- PanelBar
- PanelBarItem
- PanelGrid

- PanelGroup

Other VF Tags

- Column
- CommandLink
- Detail
- Facet
- Form
- Iframe
- Image
- include script
- 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

Action Components In Visualforce

- ActionSupport
- Action Function
- 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
- VisualforceTemplates
- Generate Visualforce page as PDF, WordDocument
- Real Time Scenarios

Usage Of CSS In Visualforce

- Create CSS Class

- InternalCSS
- External CSS
- StaticResource In ExternalCSS
- 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 StaticResorces
- URL Plugins
- AutoComplete

Usage Ajax In Visualforce

- Overview on Connections
- Ajax SOQL
- Ajax DML

Usage Of Angular Js In Visualforce

- Overview on Single Page Web Application
- Dependency Injection
- Controller, Directives
- Filters,Model
- Scope, Service
- Expressions, Module

OOPS (Object Oriented Programming)

- Fundamental and Properties
- Variables
- Identifiers
- Data types
- Access Modifiers
- Methods
- Conditional Statements
- Exceptiopnal Statements
- Class syntax writing
- Constructing Method
- Reference Variables

- Setter Method
- Getter method
- Constructors
- Class Properties
- Return Statements
- Inheritance
- Abstarction
- Polymorphism
- Encapsulaion
- Creating Wizard Class
- Wrapper Class
- Usage Of properties in sfdc

APEX

Collections

- List class-Scenarios
- Set class-Scenarios
- Map class-Scenarios
- Advanced Example Programs

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

- Objects
- fields
- Selected Options

Email Service Using Apex Class

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

Custom Setting

- List Custom setting
- Hierarchial Custom Setting

Asynchronous APEX

- Future Method-Long Running
- Queueable Apex-Chain Jobs
- Batch Apex-LargeDataVolumes
- Scheduled Apex:Run On Schedule
- Implementation
- Invoking Future Method from Schedule
- Schedule Using Point and click
- Schedule Using Code Customization

Batch APEX

- Iterable Class
- QueryLocator
- GetQueryLocator
- Start Method
- Execute Method
- Finish Method
- Sending Email From finish Method

- BatchableContext
- Debug Batch Apex
- Creating Future Methods in Batch Apex
- Implementing Database.AllowCallouts
- Call Batch In a Batch
- Serialize Batch By Batch
- RealTime Scenarios

Apex Triggers

- Overview On Triggers
- Trigger Events
- Before Triggers
- After Triggers
- Insert Triggers
- Update Triggers
- Delete Triggers
- Undelete Triggers
- New
- Old
- NewMap
- 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 Apex class, Batch APEX, Schedule Apex and Triggers

Programmatic Integration

Integration and WebServices

- Definition Of Integration and WebServices
- Purpose Of WebServices
- Types Of Web Services
- JSON Class, Generator Class, Parser, Serialization
- JSON Deserialization
- XML CLASSES IN WebServices
- HTTP Callouts
- Creating APEX WSDL File
- Integration Using SOAP API
- Integration Using REST API
- Real Time Scenarios