

SALESFORCE CRM

COURSE CONTENT

Functional

1. CRM Introduction

- Introduction to CRM
- What is CRM?
- Common business issues faced by companies today
- How CRM can help?
- What CRM brings to business?
- Evolution of CRM
- Business value of CRM
- Customers benefiting from CRM
- A view of available of CRM products from IT industry
- Compare Salesforce.com CRM with other CRM products

2. Introduction to cloud computing and Types of clouds

- Private cloud
- Public cloud
- Hybrid cloud
- Community cloud
- What is Software-as-a-service (SAAS)
- What is Platform-as-a-service (PAAS)
- What is Infrastructure-as-a-service(IAAS)
- What is Salesforce.com

3. Salesforce product.

- Salesforce CRM editions
- Salesforce.com Navigation and Architecture overview

CRM Functionality in Salesforce

1. Marketing

- Lead Process
- Lead Conversion
- Lead Management

2. Sales

- Opportunity management
- Sales Process

3. Service

- Support Process
- Web to case
- Email to case

Standard Objects

- Account
- Contact
- Lead
- Campaign
- Opportunity
- Quote
- Product
- Case

Administration-Configuration

1. Custom App development

- Home page
- Tabs
Apps
- Record
- Detail Page
- Related lists and Sidebar
- Custom Objects
- Custom Fields
- Custom Tabs
- Define depend Pick lists
- Customize Page Layouts

2. Relationships

- Master detail Relationship
- Lookup Relation
- Many to Many Relationship

3. Customized Fields

- Rollup Summary
- Formula Fields

4. Validation Rules

- Creating validation Rules
- Using cross object Formulae

5. Workflow Rules

- Creating workflow rules
- Types of actions
- Immediate workflow actions
- Time based workflow actions
- Limitations in workflow rules

6. Email templates

- Creating email templates
- Types of email templates
- Working with merge fields

7. Approval Process

- Creating approval process
- Use approval wizard (Standard vs Jump wizard)
- Unanimous , approvals

8. Page layouts and Record types

9. Security part

- Role hierarchy
- OWD
- Sharing settings
- Creating users
- Profiles
- Permission sets

Securing and Sharing Data

- Object-Level Security
- Field- Level Security
- Record-Level Security
- Field Accessibility
- Record Types

Going Global

- Locale
- Currencies
- Advanced currency Management
- Translating the User Interface
- Import
- Export

10. Analytics

- Custom reports
- Types of reports
- Dashboards
- Import Data wizard
- APEX Data Loader

Salesforce Development

- Enable Developing mode
- over View about Developer Console

OOPS (Object-oriented programming)

- MVC Architecture
- OOPS Basics
- Variables
- Data Types
- Methods
- Access Modifiers
- Comparison between Method/Function and Procedure
- Classes

1. Creation of Variables

1. Getter Methods
2. Setter Methods

2. Creation of Methods

3. with Sharing

4. With Out Sharing

- Creation of Objects
- Reference Variables

1. Apex

- Basic apex programming
- Variables
- Loops
 - For loop
 - While loop
 - Do while loop
- Introduction to developer console
- Collections
 - Lists
 - Sets
 - Maps
- Executing Apex programs using developer console
- SOQL Queries
- SOSL Queries
- Apex classes
- Apex triggers
- Apex methods
- Constructors
- Test classes for Apex classes
- Test classes for Triggers
- Trigger best practices
- Batch Apex
- Custom labels
- Governing limits for SOQL
- DML operations
- SOQL Governing limit
- DML governing limit
- DML on No. of records

Schedule Apex

- Implementing Schedule Apex
- Governing Limits

Triggers

1. Trigger Events
2. Trigger Context variables
3. Insert Triggers
 1. Trigger. New in before insert and after Insert.
 2. DML in before insert and after Insert.
4. Update Triggers
 1. Trigger.Old
 2. Trigger. OldMap
 3. Trigger. New
 4. Triger. NewMap
 5. Recursive trigger
 6. Trigger handlers
 7. Trigger's on Parent Child objects
5. Delete Triggers
6. Undelete Triggers
 - Trigger. New
 - Trigger. New Map
7. Test Classes

2. Visual force

Introduction to visual force

Input Components

- Input Text
- Input Field
- Input Hidden
- Input Secret
- Input Text Area
- Input Check box

Output Components

- Output Text
- Output Label
- Output Field

Working with components

- Page block
- Page block section
- Page block section item
- Page block table
- Form
- Command button

Controllers and types of controllers

- Standard controllers
- Custom controllers
- Extension controller

Working with below components

- Action support
- Action function
- Action states
- Implementing Pagination
- Custom buttons, List buttons, Command link, Detail buttons.
- Visual force tabs
- Working with input and output components

Basics about Integration & Lightning