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

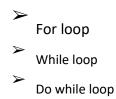
- Enable Developing mode
- over View about Developer Console

OOPS (Object-oriented programming)

- MVC Architecture
- OOPS Basics
- Variables
- Data Types
- Methods
- Access Modifiers
- Compression 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



- Introduction to developer console
- Collections



- 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