SALESFORCE.COM

CLOUD COMPUTING

- What is Cloud computing?
- Why Cloud?
- What is the topmost Technology in cloud? ▪ Features of Cloud?

CRM CONCEPTS

- What is CRM?
- Why companies are using CRM?
- 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

SFDC CRM Explanation

- What is Salesforce CRM?
- How Salesforce CRM will work in real time

SFDC –ADMINISTRATION

Extending and Customizing Salesforce CRM (Sales Cloud)
- Salesforce object Records and how to compare Salesforce records with Tables
- Build a custom app
- Working with custom objects
- Learn about custom tabs
- Working with custom fields ,lookup fields & formula fields
- How to Define dependent pick lists
- Relationship Types-(Master, lookup)

- Learn about junction object
- How to Create custom profiles
- Creating and working with custom users – Adding role & profile to user
- How to Customize page layouts
- Customize standard related lists
- Learn about record types & business processes
- Use field-level security(FLS)
- What are Buttons, Links and Actions of Salesforce Objects
- Creating &sharing List views for salesforce records
- What is User interface and how it is useful to clients in real time

Search Layouts of Salesforce Objects

- Search Results
- Lookup Dialogs
- Object Tab
- Object List View
- Search Filter Fields

Data Validation in Salesforce.com CRM

- Learn about Salesforce CRM data validation

Workflow in Salesforce.com CRM

- How to Define workflow
- How to Set up workflow rules
- Creating Workflow actions - Tasks, Field updates and alerts
  - Assigning Workflow Actions to Workflow rules ▪ Creating Email Templates.

Process Builder

- How to define Process builder
- How to work with process builder

Approval Process in Salesforce.com CRM

- What is approval processing and how we use in real time

- How to use the approval wizard – standard vs. jump start
- Create approval process and setup with actions to execute the process
- Create data validation rules

Data Management (Apex Data loader)

- Importing overview
- Working with import wizard
- Working with data loader –Insert,Upsert, Export, Export All, Delete, Delete All Salesforce Records

Reports&dashboards in Salesforce.com CRM

- Create custom reports
- Create Tabular,Matrix,Summery & Joined Reports
- How to use advanced filters
- How to use conditional highlighting
- How to use custom summary formulas
- How to use dashboards

Company Profile

- What is the company information
- How to setup language and currency at company level
- What is business hours and holidays
- Working with multi-currency

Security in Salesforce.com CRM

- How to set login access to users
- How to restrict users to login in to salesforce
- Profile level security Restriction
- Org wide Security Access
- Working with password policies

Managing Users in Salesforce.com CRM

- Profiles
- Roles

- Groups
- Queues
- Permission Sets

Sharing Settings/Rules in Salesforce.com CRM
- Assign users to different roles
- How to Set organization-wide defaults(OWD)
- Learn about record access
- How to Create the role hierarchy
- What are Groups & Queues and how to create these in SFDC
- Learn about the Sharing model
- Object-Level-Security
- Field Accessibility
- Record-Level-Sharing
- Manually share records to Used,Roles,Public Groups & Queues

Standard Marketing Objects
- Campaigns
- Leads
- Working with standard marketing objects

Standard Sales Objects
- Leads
- Opportunities
- Account s(Two type of Accounts)
- Contacts
- Working with standard Sales objects

Standard Service Objects
- Account
- Contact
- Case
- Solutions
- Entitlements
- Knowledge Articles

- Working with standard Service objects

Salesforce.com Sites & Communities

- How to create communities
- How to work with communities
- Sharing records using communities
- Knowledge base articles
- Case Entitlement Process

Business Processes

- Lead Processes
- Sales Processes
- Support Processes
- Entitlement Processes
- Solution Processes

Sales cloud operations in Lead& Opportunity Management

- How many ways we can create Lead?
- Web to Lead creation
- Direct Lead creation
- Converting Leads to Account, Opportunity, Contacts
- Mapping Custom Lead fields to Account, opportunity, contact fields
- Opportunity Teams

Sales cloud operations in Product management

- What is Product management
- Working with product management
- Products
- Quotes
- Price Books
- Opportunity Products(Opportunity Line items) ▪ Activities – Event , Task

<u>Service cloud operations in real time Salesforce</u>

- How to use Service cloud in real time salesforce ▪ What is case management in salesforce ▪ How many ways we can create Case?
- Web-to-Case
- Email-to-Case
- What is Service Console
- Working with Live Agent Console
- Case Creation using Live Agent Customers
- Case Assignment rules
- Case Auto Response rules
- Case Escalation rules
- Support process
- Case Entitlement Process

<u>Monitoring your Org</u>

- Debug Logs
- Email Logs
- Login History
- View Setup Audit Trail
- Time-based Workflow
- Scheduled Job
- Outbound Messages
- Apex Job Queue
- Import Queue
- Mass Email Queue
- Case Escalation Rule Queue
- Entitlement Process Queue ▪ Bulk Data Load Jobs

<u>Deployment</u>

- Sandbox Types
- How to deploy using Change Sets
- How to deploy using Eclipse

SALESFORCE DEVELOPMENT

Development Process in Salesforce.com CRM
- Enable Developing mode
- Over View about Developer Console
- Over View about Eclipse
- Development using eclipse and options
- Development using aside.io https://www.aside.io/login
- Testing apex classes and triggers using eclipse and developer console
  - MVC Architecture

Core Java – OOPS Concepts (Object Oriented Programming System)
- What is meant by oops?
- What are the features available in oops
- Inheritance
- Polymorphism
- Abstraction
- Encapsulation
- Object
- Class
- Super keyword, Final keyword, Static keyword, this keyword
- Method Overloading
- Method Overriding

APEX
- Introduction to Apex
- Data Types
  - Primitive
  - Non Primitive
- Collections
  - List
  - Set
  - Map

- Enums
- Variables
- SOQL – Salesforce Object Query Language
    - Group By
    - Having
    - Limit
    - Offset
    - Update Lock
    - Aggregate Result

- SOQL – For Loops
- Relationships in Salesforce
- Standard format of relationships queries in salesforce
- Sample Relationship Queries
- Governing limits for SOQL
- SOSL - Salesforce Object Search Language
- Control flow statements
    - If - Else
    - Do while Loops
    - While Loops
    - For Loops

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- Classes in Salesforce.com CRM
    - Apex Class Definition
    - Class Variables
    - Class Methods
    - Class Constructor
    - Access Modifiers
    - Apex Properties
    - Extending Class
    - Static Variables, Methods
- Sample Apex Classes in Salesforce.com CRM
- Difference between Apex classes and Java Classes
- Objects in Salesforce.com CRM
- DML Operations

    - Insert
    - Update
    - Upset
    - Delete
    - DML governing limits
- Database. Save Point
- Database. Rollback operations
- Working with workbench
    - SOQL Operations
    - DML Operations

- Apex Triggers
  - Types of Triggers (Before & After)
  - Trigger Events
  - Trigger Context variables
  - Sample Triggers
  - Order of Execution
  - Trigger with helper Classes
  - Trigger Best Practices (Bulkify Triggers)
  - Recursive trigger
  - Invoking Batch Apex from Triggers
  - Invoking Schedule Apex from Triggers
  - Invoking Email's from Triggers
  - Invoking future Methods from Triggers
  - Invoking Callouts from Triggers
  - Invoking apex classes from Triggers
  - Write Test Classes for Triggers

- Setup Objects
- Non Setup Objects
- Future Methods
- Annotations
- Custom Settings
  - List Settings
  - Hierarchical Settings
- Custom Labels
- Translation work bench
- Salesforce to Salesforce connection without Coding

Salesforce to Excel without coding
- Salesforce to Informatica without Coding
- Salesforce to Facebook without Coding (Authentication provider , Single Sing on)
- Salesforce to OKTA (single sign on)
- Apex based Sharing rules
- Apex based auto approval process
- Wrapper Class

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- Database operations – DML & SOQL

BATCH APEX

- What is batch apex class
- What are the methods available
- Working with example
- Calling one batch apex from another batch apex class
- Dynamic SOQL Query in batch class
- Real-time example
- Governing Limits ▪ Apex Scheduler

VISUAL FORCE

- What is visual force?
- Introduction to Visualforce
- Creating VF Pages in different ways in Salesforce by
    - Using URL
    - Using Developer Console
    - Using Eclipse
    - Using Standard Navigation
- Binding the global data on VF page
- Global Objects in VF page
- Print data in VF page
- Standard Input Components
    Input Text
    Input Field

Input Hidden
IinputSecret
InputTextArea
Input Checkbox

- Standard Output Components
  Output Text
  Output Label
  OoutputField
- Standard Other Components
  Page
  Detail
  Datatable
  Datalist
  Pageblocktable
  Repeat
  Facet
  Form
  Column
  Image
  Outputlink
  Outputpanel
  PageblockButtons
  PageblockSection
  Panelbar
  PanelBarItem
  PanelGrid
  PanelGroup
  Param
  relatedlist

- Standard Actions
  Commandbutton
  CommandLink
- Display salesforce single object detail page
- Insert Salesforce single object
- Display salesforce list of object records
- Insert Salesforce list of object records

- Standard Pagination for list of records

Combined Visualforce with APEX Controllers Custom controllers

- Display salesforce single object detail page using custom controller
- Insert Salesforce single object using custom controller Display salesforce list of object records using custom controller
- Insert Salesforce list of object records using custom controller
- Standard Pagination for list of records using custom controller

Extension controllers

- Display salesforce single object detail page
- Insert Salesforce single object
- salesforce list of object records
- Insert Salesforce list of object records
- Pagination for list of records using standardsetcontroller
- Displaying error messages from controller classes and from triggers
- Overriding standard buttons and links
- Inline VF pages creations
- Static resources
- JavaScript with Visualforce client validations using JavaScript Events
- JQuery with Visualforce Controller
  -Include script
  -JQuery plugin insertion
  -JQuery examples
- Actions in visual force controllers
  Action function
  Action region
  Action status
  Action Support

- CSS Styles with Static resources

  -styles

   -external styles

  - Includescript

- JavaScript Remote Action ▪ Custom Pagination

  Using Standardsetcontroller

  Using Offset

- Visualforce Wizard

  Passing data from one vf page to another page

  Saving records in final vf page

- Parameters in vf controllers using commandbutton

  Using commandlink

  Displaying related list for each parent records in pageblocktable split options

  sending to different pages

- Rerendering the page

- Rendered the page

- Ajax in VF page Sforce connection

  Querying data from VF page

  DML operations directly from VF page without apex

- HTML with Visualforce pages

Wrapper class

- Simple wrapper class example

Test Classes

- Introduction to test classes
- test class for trigger
- Test class for controllers
- Test class for batch apex
- How to execute test classes

  Test classes best practices

Email Services

- ▪
  - ▪ 1. Inbound Email Service
    1. Creating Inbound Email Handlers
    2. Creating Inbound Email Service
    3. Creating a lead based on inbound email
    4. Invoke a batch apex based on Inbound ▪ 2. Outbound Email Services

Salesforce Web Services - Integrations using API's

1. SOAP API
   - 1.1. What is SOAP API?
   - 1.2. Usage of SOAP API
   - 1.3. When it is used
   - 1.4. How to send the data from salesforce to External system: Explaining with real time example
   - 1.5. How to retrieve the external data in to salesforce: Explaining with real time example

2. REST API
   - 2.1. What is RESTAPI?
   - 2.2. Usage of REST API
   - 2.3. When REST is used
   - 2.4. How to send the data from salesforce to External system: Explaining with real time example
   - 2.5. How to retrieve the external data in to salesforce: Explaining with real time example

Code Optimization in Real time Salesforce

- ▪ Apex Best Practices
- ▪ Governor limits overcome for SOQL in Salesforce
- ▪ How to overcome governor limits for DML operations in controller classes