

## CRM CONCEPTS

- 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
- What CRM means to you as a user?
- Customers benefiting from CRM
- A view of available of CRM products from IT industry

## Administration

### Sales Cloud Concepts

- Home page, Tabs, Apps, Tab Home Pages, Record, Detail Page, Related lists and Sidebar
- Understanding Leads and Opportunities
- Adding A Lead
- Adding An Account
- Edit An Account Record

### Standard SFDC Applications

- CRM Content
- Chatter
- Knowledge
- Entitlements & Service Contracts
- Answers
- Mobile
- Customer Portal Partner Portal
- Force.com Sites

### Sales force.com Overview

- Overview of products
- Service cloud and Remedyforce
- Social Chatter and Radian6
- Custom Force.com, Database.com, Heroku
- App exchange
- Editions and pricing

## Security

- User Security and Authentication
- Session Security Network
- Security Security Tokens
- Data Security

### **Standard Objects**

- Account
- Person Account
- Contact
- Lead
- Campaign
- Opportunity

### **Managing Users**

- Profiles
- Roles
- Groups
- Queues
- Permission Sets

### **Securing and Sharing Data**

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

### **Automate Business Process with Workflow Developing Approval Processes**

- Formulas
- Syntax
- Object Formulas
- Where Do I Use Them?
- Workflows & Business Rules
- Visualforce
- Limitations
- Best Practices
- Predefined Function and experiment

### **Going Global**

- Locale
- Currencies
- Import
- Export

### **Using Analytics**

- Running Dynamic Reports
- Custom Report Types
- Dashboards
- Analytic Snapshots

### **Overriding Link, Tabs and Label Sending Mass Email Importing Data**

- Import Data wizard
- APEX Data Loader
- From Command Prompt

### **Monitoring your Org**

- Debug Logs
- Email Logs
- Login History
- View Setup Audit Trail
- Time-based Workflow
- Scheduled Job
- Outbound Messages
- Apex Job Queue