



## Salesforce.com Administration Course Details

V1.0

- CRM Overview
  - Introduction to CRM?
  - Why CRM?
- Introduction to Cloud Computing & Salesforce.com
  - Cloud Computing - Overview
  - 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?
  - Salesforce.com CRM Editions
  - Salesforce.com Navigation - Overview
- Sales Cloud - Terminology
  - Campaigns
  - Leads
  - Accounts
  - Contacts
  - Opportunities
  - Forecast
  - Contracts
  - Cases
  - Solutions
  - Products



- Chatter
- Salesforce Cloud Platform – Explained
  - Sales Cloud2 Platform
  - Force.com Platform
    - App Force
    - Site Force
    - VM Force
    - Heroku
    - ISV Force
- Salesforce Application elements
  - Home Page, Tabs, Tab Home Pages, Detail Page, Side Bar, Apps, Record
- Personal Setup
  - Managing Personal Information
  - Password Reset
  - User Management Overview
  - Roles, Users, Profiles & Sharing



IT & ENGINEERING SERVICES

TRAINING

PROJECTS

PLACEMENTS

- Salesforce Building Blocks
  - Standard Objects
  - Create custom Objects
  - Create custom Fields
  - Create custom Tabs
  - Define dependent Pick lists
  - Customize page layouts
  - Custom Application
  
- Working with Standard Objects
  - Campaigns
  - Leads
  - Accounts
  - Contacts
  - Opportunities
  - Product
  
- Relationship Types
  - Master-detail Relationship
  - Look-up Relationship
  - Many-to-Many Relationship
  
- Create and managing the Roll-up summary fields
  
- Data Validation rules
  - Create data validation rule
  - Learn about custom field unique and duplicate properties
  
- Customize formula-fields



- Workflow rules
  - Define workflow
  - Create Email template
  - Set up workflow rules
  - Set up workflow actions
- Workflow Approval process
  - Plan approvals using workflow
  - Use the approval wizard – standard vs. jump start
  - Create workflow approvals
- Analytics – Reports & Dashboards
  - Report Overview
  - Create custom reports
  - Using filters
  - Using conditional highlighting
  - Custom summary formulas
  - Working with dashboards
- Data Management



**IT & ENGINEERING SERVICES**

**TRAINING**

**PROJECTS**

**PLACEMENTS**

- Importing Overview
- Exporting Overview
- Import custom object records using the Data Loader
- Use mass delete
- Use storage
  
- User Management
  - Creating Users
  - Creating Profiles
  - Creating Roles
  - Creating Groups
  
- Security
  - Managing the Users
  - Set Organization Wide Defaults (OWD)
  - Object-level Security
  - Field-level Security
  - Record-level Security
  
- Record types
  - What is Record type?
  - How to create Record type?
  - Managing Record types
  
- Sharing Rules
  - Define Sharing rules
  - Discuss about types of sharing rules
  
- Monitoring Organization Data



**IT & ENGINEERING SERVICES**

**TRAINING**

**PROJECTS**

**PLACEMENTS**

- Debug logs and Email Logs
- Login History
- View Setup Audit Trail
- Discuss about Queue
- Outbound messages
- Schedule Jobs
- Apex Jobs
- Bulk Data Load Jobs
  
- Force.com Platform Revisited
  - Apex, Visual Force, Database.com & AppExchange
  - How to install an AppExchange application
  - AppExchange – Application Management
  
- Working with Developer Console
  - Customizing the console
  
- Salesforce.com Certifications – Overview
  - Salesforce.com Certified Administrator (ADM 201)
  - Salesforce.com Certified Advanced Administrator (ADM 301)
  
- Certification Practice Questions



## Salesforce.com Development Course Details V1.0

- Salesforce CRM Overview
- Salesforce Architecture
  - Cloud Computing Overview & Architecture
  - Introduction to Force.com Platform (PaaS)
- Advanced Configuration
  - Application Elements (Tabs, App, Links, Home Page Component)
  - Salesforce Building Blocks & Configuration
    - Objects
    - Page Layouts
    - Related List
    - Fields
    - Buttons
    - Formula Fields
    - Relationships
    - Workflow Rules & Approval Processes
- Personal Customization



- Introduction to oops concepts
  
- Apex Development Building Blocks
  - Apex Trigger
  - Apex Classes
  - Visual force Pages
  - Developer console
  - SOQL
  - SOSL
  - Developer Console
  - Debugging
  - System Log
  
- Apex Triggers
  - Trigger Events



- Apex Programming
  - Introduction to Apex
  - Language Constructs
  - Classes, Objects, and Interfaces
  - Dynamic Apex
  - Batch Apex
  - SOQL & SOSL
  - Email API
  - Debugging
  - Writing Apex Classes as Web Services
  - Invoking Callouts Using Apex
  - Deploying Apex
  
- Apex Test Classes
  
- Visual force Development
  - Introduction to Visual force
  - Standard Controllers
  - Standard List Controllers
  - Controllers and Controller Extensions
  - Overriding Buttons, Links, and Tabs with Visual force
  - Components
  - Dynamic Visual force Bindings & Components
  - Integrating Email with Visual force
  - Visual force Charting
  
- Best Practice

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  - 2.2 Definition Of Salesforce And It's Products
  - 2.3 Salesforce Administration
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    - 2.4.18 Usage Of Angular Js In Visualforce
    - 2.4.19 OOPS ( Object Oriented Programming )
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    - 2.5.3 DML Operations
    - 2.5.4 Controllers In APEX
    - 2.5.5 Schema Programming
    - 2.5.6 Email Service Using Apex Class
    - 2.5.7 Custom Setting
    - 2.5.8 Asynchronous APEX
    - 2.5.9 Batch APEX
    - 2.5.10 Apex Triggers
    - 2.5.11 Test Class
  - 2.6 Programmatic Integration
    - 2.6.1 Integration and WebServices

## SalesForce CRM Training Overview

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 Fisca Year, Business Hours
- Setting Holidays and Language
- Identifying Edition

### Salesforce-Force.Com Platform

- Creating User Login Credentials
- Setup-Personal Setup
- About Administartion 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 Rlationships

- Junction Object
- Rollup Summary Fields
- ReaTime 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 StaticResources
- 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
- Exceptional 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
- Governing Limits on Apex
- RealTime Project Scenarios

### 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
- Implemantation
- Invoking Future Method from Schedule
- Schedule Using Point and click
- Schesule Using Code Customization

#### Batch APEX

- Iterable Class
- QueryLocator
- GetQueryLocator
- Start Method
- Execute Method
- Finish Mehtod
- Sending Email From finish Method
- BatchableContext
- Debug Batch Apex
- Creating Future Methods in Batch Apex
- Implememnting 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

