

## Salesforce course content

### ADMIN

#### 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 Architecture – Cloud Computing is a Better Model Multi-tenant
- Salesforce Editions / Pricing

#### Salesforce.com Navigation - Overview:

- Salesforce Certifications
- Certified Force.com Developer(401)
- Certified Administration (201)
- Certified Advanced Force.com Developer(501), etc.,

#### Database Introduction:

- Database Model - Object Creation
- Salesforce Building Blocks
- Standard Objects
- Create custom Objects
- CRM functionality in Salesforce and use of standard objects
- Custom Objects Vs. Standard Objects
- Create custom Fields
- Create custom Tabs

#### Types of Tab:

- Standard Objects – Account, Contacts, Leads, Campaigns, Opportunities etc.,
- Custom object Tabs
- Web Tabs

- Visual force Tabs

#### Custom Application:

- Limitations
- Field Creation and its Relationships a. Different Data types  Standard Data types :
  1. Text, Email, Number, Currency, URL, Text Area.
  2. Storage Limitations Read only Data types:
  1. Auto Number, Formula and Rollup summary
  2. Rollup summary Operations
  3. Sum(), Min(), Max() and Count

#### Relational Data types:

- Lookup Vs. Master - Detail Relationship
- Limitations
- Required, External Id, Default Value and Unique fields

**Salesforce Application elements:** Home Page, Tabs, Tab Home Pages, Detail Page, Side Bar, Apps, Record

#### Page Layouts:

- Defining Page layouts
- Field order changes
- Adding custom buttons and links
- Defining required and read only fields
- Adding related list

#### Record Types:

- To create and maintain record types for your organization.
- Display different page layouts and picklist values based on record types.
- Uses of Record Types

#### Field Dependencies:

- Controlling field/Dependent field?
- Making dependent pick list fields
- Limitations

#### Validation Rules:

- Defining Salesforce Data Validation
- Creating Custom Validation Rules
- Validation Vs. Trigger

#### 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

#### Email Templates:

- Email Templates – Sending Single emails and Mass emails.
- Types of Templates - HTML (Using Letter Head) , Custom HTML (without using letter head), Visual force Email Templates

#### Data Management:

- Import Wizard Vs Data Loader
- Importing Overview
- Exporting Overview
- Import custom object records using the Data Loader
- Use mass delete
- Use storage

#### Personal Setup:

- Managing Personal Information
- Password Reset
- User Management Overview
- Roles, Users, Profiles & Sharing

#### Users, Roles and Profiles:

- Creating Users

- User Licenses Overview
- Understanding Record Ownership and Access
- Role Hierarchy
- Profiles

1. Overview and different profiles
2. User Permissions

#### Security:

- Managing the Users
  - Set Organization Wide Defaults (OWD)
  - Object-level Security
  - Field-level Security
  - Record-level Security  Sharing Rules
1. Define Sharing rules
  2. Discuss about types of sharing rules **Reports &**

#### Dashboards AppExchange:

- Installing an App
- Uninstalling an App