

# ***Salesforce CRM (Admin and Developer)***

**Objective:** Salesforce provides a platform with many point and click features like Objects, Workflows, Approvals, and Flows etc. which do not require any coding knowledge. It also provides a Visualforce for designing and apex to give business logic.

**Pre-requisites:** To learn salesforce we do not require much programming knowledge. Salesforce comes with many in-built applications including sales, marketing, call center these are helpful to improve and effectively collaborate/manage with customers for any business. If we have basic understanding of HTML and Core Java or any programming language, we can easily learn apex and visual force.

## **Session 1 (Salesforce Administrations)**

- Know the Basic
- Learn Navigation in SF CRM
- Architecture of Salesforce
- Personal Setup
- Reset Person Info
- Password Security Token
- Advance User Settings
- Display and Layout: Tabs Customization
- Display and Layout: Page Layout Customization
- Org Setup
- Understanding Salesforce Editions
- Understanding Salesforce Licenses
- Security and Identity Confirmation

## **Session 2 to 5 (Sales Application)**

- News Feed in Chatter
- Create Group in Chatter
- Campaigns
- Type of Campaigning
- Leads
- Understanding Industries for leads
- Accounts and Contacts
- Opportunities
- Stages of Opportunities

- Contracts
- Orders
- Products, Quotes and Price Book
- Cases and Solutions

### **Session 6 to 9 (Working over Custom App Development)**

- Create Custom Objects
- Create Custom Tabs
- Auto-Number Fields
- Formula Fields
- Checkbox Fields
- Currency, Number and Percent Fields
- Picklist and Multi-Select Fields
- TextArea and TextArea Long Fields
- Phone and Email Fields
- Geolocation Field
- Create Custom Fields
- Create and Apply Validation Rules
- Create Object with Schema Builder
- Create fields with Schema Builder
- Create Relationships with Schema Builder
- Data Relationships
- Lookup Relations
- Master Detail Relationships
- Many to Many Relationship – Junction Object
- Hierarchical Relationships
- Roll up Summary
- Creating Field Dependencies

### **Session 10 (Lock the Org)**

- Understanding Users
- Understanding Roles and Profiles
- Organization Wide Default
- Create Custom Views
- Field Accessibilities
- Role Hierarchy

### **Session 11 to 13 (Administration and Utilities)**

- Import mass data with Data Loader
- Update mass data with Data Loader
- Delete mass data with Data Loader
- Export mass data from salesforce to local system with data loader
- Upsert Operation with data loader
- Import mass data with Data Import Wizard
- Update mass data with Data Import Wizard
- Delete mass data with Data Import Wizard
- Web to lead
- Queue Assignment
- Lead Assignment
- Approval Process

### **Session 14 to 17 (Develop Your Logic)**

- Email Templates: Custom
- Email Templates: HTML with Letterhead
- Email Templates: HTML without Letterhead
- Workflow Rules and Workflow Actions
- Process Builder

### **Session 18 to 19 (Data Analytics)**

- Introduction to Reports and Dashboards
- Tabular Reports
- Summary Reports
- Matrix Reports
- Types of Dashboards
- Drawing Dashboards from Reports
- Data Analysis with Reports and Dashboards

### **Session 20 (Project Work)**