

Salesforce CRM

CRM CONCEPTS

- What is CRM?
- Common business issues faced by companies today

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

products from IT industry

- Compare Salesforce.com CRM with other CRM products

with other CRM products

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
- Adding A Product To An

Opportunity

- Sales ID
- Adding A Task
- Connect To Microsoft Outlook
- Send And Add An Email
- Logging A Call
- Document Tab
- Web to lead
- Web to case
- Assignment Rules
- Auto response Rules
- Sales automation
- Converting A Lead
- Team Contacts
- Adding An Opportunity
- Adding A Contact
- Creating A View
- Activity History
- Submitting A Case
- Campaigns
- Partner Roles
- Portals
- Communities

Standard SFDC Applications

- Salesforce CRM Content
- Chatter
- Salesforce Knowledge
- Entitlements & Service Contracts
- Salesforce Answers
- Salesforce Mobile
- Customer Portal Partner Portal

Salesforce to Salesforce

- Force.com Sites

Sales force.com Overview

- Overview of products
- Sales Sales cloud and jigsaw
- Service service cloud and

Remedyforce

- Social Chatter and Radian6
- Custom Force.com, Database.com,

Heroku

- Appexchange
- Editions and pricing

Service Cloud Concepts

- Create Case
- Researching and Resolving Cases
- Communicating the Outcome
- Automate case management
- Capturing and associating cases

efficiently

- Helping customers helping

themselves

- Improving productivity
- Manage Cases

Security

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

Standard Objects

- Account
- Person Account
- Contact
- Lead
- Campaign
- Opportunity
- Quote
- Product and Price Bank
- Case
- CRON Trigger

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

- Divisions
- Locale
- Currencies
- Advanced currency

Management

- Translating the User

Interface

- Import
- Export

Using Analytics

- Running Dynamic

Reports

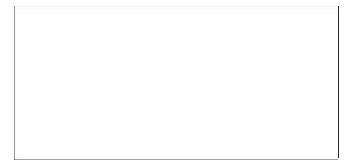
- Custom Report Types
- Dashboards
- Analytic Snapshots

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 Queue
- Scheduled Job ➤ Outbound
- messages ➤ Apex Job queue
- Import Queue ➤ Mass
- Email Queue
- Case Escalation Rule ➤ Queue
- Entitlement Process Queue ➤ Bulk
- Data Load jobs

Apex

World's First Cloud Computing Language

- Introduction to Apex Code
- Language Constructs ➤ Invoking
- Apex
- Classes, Objects and interfaces
- Apex Design Patterns ➤ Dynamic
- Apex
- Debugging Apex
- Developing Apex in managed packages
- Exposing Apex Methods as web services
- Invoking call outs using Apex ➤ Testing Apex
- Batch Apex
- Deploying Apex
- Plugins ➤ Flows
- Schema Programing
- Meta Data API ➤ Bluk
- API
- Rest API
- JSON
- XML Parsing
- Refreshing Token
- Salesforce to Salesforce Integrator

Visualforce custom user Interfaces

- Introduction and Tools
- Styling VF pages ➤ Standard
- Controllers and ➤ Standard List
- Controllers
- Custom Controllers and Controller Extensions

Advanced examples

- Overriding button, links and tabs with VF ➤ Using static resources and custom components ➤ Navigating between page
- Pagination using VF
- JQuery using VF
- Dynamic VF Binding and Components
- Intergrading e-mail with VF ➤ Rendering
- Flows with VF ➤ Templating With VF
- Developing for Mobile Devices
- Adding VF to force.com AppExchanges App ➤ Using java
- Script in VF Pages
- Best Practices
- JavaScript Validations
- Pagninations

Custom Components

- Visual Force Charts
- Email Templates using VisualForce ➤ Dash boards using Visual Force

Types of Orgs

- Production Org
- Sandbox Org ➤ Developer
- Org ➤ Partner Developer Org
- Pre-release Org
- Where Should you Develop?

Deploying Code to Production Force.com IDE

- Force.com Migration Tool
- Unmanaged Packages
- Change Sets

Integrations

- Single signon ➤ OKTA
- Integration ➤ Informatica
- CTI Integrator ➤ JERA
- Integration ➤ Marketo
- Integration ➤ Magento
- Integration ➤ Oracle
- Integration ➤ Java
- Integration ➤ Heroku