ITBRAINY

Administration

1. Introduction to Salesforce

1.1 About Cloud Computing

1.2 Types of Cloud Computing

1.3 Architecture (Cloud Computing)

2. CRM

2.1 Why CRM?

2.2 Software – as – a – Service (SAAS)

2.3 Platform – as – a – Service (PAAS)

2.4 Infrastructure – as – a – Service (IAAS)

3. Database Introduction

3.1 Database Model – Object Creation

3.2 Salesforce Building Blocks

3.3 Standard Objects

3.4 Create Custom Objects

3.5 Create Custom Fields

3.6 Create Custom Tabs

4. Tab Types

4.1 Standard Objects – Account , Contacts , Leads , Campaigns , opportunities , Reports etc.

4.2 Custom Object Tabs

4.3 Web Tabs

4.4 Visual force Tabs

ITBRAINY

5. Custom Apps

5.1 Field creation and its Relationships

5.2 Different data types

a. Standard –

i. Text, Email , Currency , Url , Text Area

ii. Storage Limitations

b. Read Only –

i. Auto Number , formula , Rollup Summary

ii. Sum() , Min() , Max() and Count

6. Relational Data Types

6.1 Lookup Vs Master – Detail Relationship

6.2 Required , External Id , Default Value and Unique Fields

7. Page Layout

7.1 Defining Page Layouts

7.2 Adding custom buttons and links

7.3 Adding related lists

8. Record Types

8.1 Use of record types

8.2 Based on record types display different page layouts anf picklist values

9. Field Dependencies

9.1 Controlling field / Dependent fileld

9.2 Make dependent pick lists fields

9.3 Limitations

10. Validation Rules

ITBRAINY

10.1 Defining Salesforce Data Validation

10.2 Creating custom Validation Rules

10.3 Validation Vs Trigger

11. Workflow Rules

11.1 Define Workflow

11.2 Email Template Creation

11.3 Set Up workflow rules

11.4 Set up workflow actions

12. Workflow Approval Process

12.1 Configuring approval process

12.2 Creating custom hierarchy fields

12.3 Adding multiple steps to it

12.4 Configuring and working with queue

12.5 Approving record from emails

13. Lightning Process Builder

14. Reports and Dashboards

15. Email Templates

15.1 Sending Single emails and Mass emails

15.2 Types Of templates

a. HTML

b. Custom

c. Visual force

16. Data Management

16.1 Import Wizard Vs Data Loader

ITBRAINY

16.2 Importing and exporting overview

16.3 Use mass delete

16.4 Use storage

17. Personal Setup

17.1 Managing Personal Information

17.2 Password Reset

17.3 User Management Overview

17.4 Roles, Users, Profiles & Sharing

18. Users , Roles and Profiles

18.1 Creating Users

18.2 User Licenses Overview

18.3 Understanding Record Ownership and Access

18.4 Role Hierarchy

18.5 Profiles

a. Overview and different profiles

b. User Permissions

19. Security

19.1 Managing the Users

19.2 Set Organization Wide Defaults (OWD)

19.3 Object-level Security

19.4 Field-level Security

19.5 Record-level Security

19.6 Sharing Rules

a. Define Sharing rules

b. Discuss about types of sharing rules

20. App Exchange

20.1 Installing an App

20.2 Uninstalling an App

ITBRAINY