SALES FORCE CRM COURSE CONTENT

CONFIGURATION
Hands-on configuration of the SFDC Administration, Visual Force Pages and Controllers and OOPS with Force.com The following topics are covered in details along with hands-on practice:

Getting Started with Salesforce CRM Navigation

Getting Started with Salesforce CRM SF

ADMINISTRATION ESSENTIALS:

- SECURITY CONFIRMATION
    - Activate your computer Navigation
    - Set up Admin options & UI Organization Administration
    - Set your organization's language & locale
    - Manage currency Customization
    - Create custom fields
    - Define dependent picklists
    - Customize lookup fields & formula fields
    - Customize page layouts
    - Customize standard related lists Security & Access
    - Create & manage your users
    - Set organization-wide defaults
    - Learn about record access
    - Create the role hierarchy
    - Learn about the sharing model
    - Manually share records
    - Learn about folder access Data Validation
    - Learn about Salesforce CRM data validation
    - Create data validation rules
    - Learn about custom fields required & unique properties
    - Learn about role transfer & mass transfer functionality Data Utilities
    - Importing records using the import wizards

- Use mass delete
- Use mass transfer
- Learn about storage utilization Analytics
- Create custom reports
- Use advanced filters
- Use conditional highlighting
- Use custom summary formulas
- Create dashboards The AppExchange
- Learn about the AppExchange
- Install an app
- Uninstall an app Marketing Administration
- Learn about lead queue & lead assignment setup
- Learn Web-to-lead & auto-response rules Service & Support Administration
- Learn about cases & solutions
- Set up case escalation rules
- Identify solution categories & suggested solutions Salesforce Console
- Navigate the Salesforce Console
- Create a Salesforce Console Extending Salesforce CRM
- Learn about custom objects
- Learn about custom tabs
- Learn about custom Web tabs
- Build a custom app

Building Applications with Force.com & Visualforce Designing Applications on Force.com Learn about factors to consider when building a data model Develop custom objects and fields, encrypted fields, field help, and field history tracking Use master detail, lookup, and many-to-many relationships Create a user interface for custom applications using the Custom Object tab, Page Layout, and Customization options Set field attributes on the page layout Use the Custom Object queue and event-based workflow rules with field update actions Develop custom formulas and validation rules Designing Applications for Multiple Users Learn about factors to consider when designing applications for multiple users Create profiles, understand what a profile controls (including data access), and customize profiles to manage the user experience Customize the user experience with record types and page layouts Control access to records Employ OWD, sharing rules and levels, roles, public groups, and manual share Apply profiles, OWDs, role hierarchy, and sharing to restrict access to sensitive data Apply OWDs, public groups, and manual sharing to create conditional access to data Analyze suitability of FLS, page layouts, and record types to satisfy business requirements Implementing Business

Processes Use the vlookup, regex, ischanged, isnew, and priorvalue functions to build business processes Use validation rules to enforce conditional required behaviour Use functions to enforce data format and data consistency Implement multistep approval workflows and escalations to automate business processes Create parallel approval workflows and workflow approvals with dynamic approval routing Use outbound messages as part of an approval workflow Establish approval workflow criteria with crossobject formulas Set up field history tracking to audit processes Learn techniques to prevent or record data changes Managing Data Learn when and how to use upsert Use data management tools and the capabilities of API-based tools Configure the Data Loader via command line Encrypt passwords using encrypt.bat Use the Data Loader to create mapping files and to upsert data Visualforce Pages Learn about the capabilities of the Visualforce framework Incorporate Visualforce pages into Salesforce Construct expression bindings and incorporate Salesforce into Visualforce pages with Visualforce tags Use Visualforce tags to create page layouts, input forms, output tables, custom components, and more Create partial page refreshes on JavaScript events Learn about the functionality that comes with Visualforce standard controllers Find out when Apex is required for creating custom controllers or extensions.

APEX & VISUALFORCE CONTROLLERS:

- APEX

    - Learn about Apex features compared to other programming languages,

    - Learn about use cases for which Apex is a good solution,

    - Learn about Apex access modifiers,

    - Learn about available Apex object types,

    - Learn about types of collections,

    - Learn the syntax for including SOQL queries within Apex,

    - Write SOQL for loops to handle bulk data,

    - Learn about the two types of DML statements,

    - Use limit statements,

    - Learn about the Save execution order and when "before" and "after" Apex triggers fire,

    - Learn about the types of governor limits and contexts,

    - Code Apex triggers to handle bulk data,

    - Create a unit test for a previous class, using assertion methods, and run a test,

    - Write a Web services class,

    - Consume an external WSDL and access it through Apex,

    - Learn the arguments to send an email from Apex,

    - Create a Salesforce email domain and code a class to consume email.

- VISUALFORCE CONTROLLERS
    - Explore the functionality of each Visualforce standard controller,
    - Code custom controllers and extensions,
    - Use testing, debugging, and deploying controllers capabilities,
    - Learn the basics of testing controllers vs. regular Apex classes.