

Salesforce CRM

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

Salesforce CRM Admin & Development

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- ✓ 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 behavior
- ✓ 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