

Salesforce Administration

Lessons 1: Cloud Computing Concepts

- What is Traditional Computing?
- Disadvantages of traditional Computing?
- What is Cloud Computing?
- Advantages of Cloud Computing over Traditional Computing?
- Phases of Cloud Computing (IAAS, PAAS, SAAS)
- Different types of Clouds?
- Architecture of Cloud Computing?

Lessons 2: CRM Overview

- What is CRM?
- How CRM can help to Business?
- Advantages of the CRM?
- What are the different types of CRM technologies in the Market?
- Why salesforce.com CRM is so famous than other CRM technologies?

Lesson 3: Salesforce Overview

- What is Salesforce.com?
- History of the Salesforce.com?
- Architecture of the Salesforce.com?
- Different Clouds in Salesforce.com?
- Different type of API's in salesforce.com?
- What is AppExchange?

Lesson 4: Salesforce

- Introduction to Salesforce
- Salesforce Overview
- Salesforce Editions
- Home Page Customization
- user Management
- Creating & Customizing Tabs
- Creating an APP
- Uploading a Company Logo
- Company Information Page

- System Overview Page
- Updating the Fiscal Year

Lesson 5: Sales Cloud

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- Sales Cloud
- Leads Home Page
- Creating List Views
- Creating and Converting leads
- Creating Accounts
- Creating Contacts
- Creating Email Templates
- Sending Individual Mails
- Sending Mass Emails
- Creating and managing Price Books
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- Creating a Lead Queue
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- Enabling Solutions
- Creating Solutions
- Attaching Solutions to Cases
- Enabling Knowledge
- Configuring Knowledge
- Creating a Web-to-case Form

- Creating a Email-to-Case Address

Lesson 7: Applications

- Standard Applications
- Custom Applications

Lesson 8: Salesforce Objects

- Standard Salesforce Objects
- Custom Salesforce Objects

Lesson 9: Salesforce Tabs

- Custom Object Tab
- Web Tab
- Visual Force Tab
- Lightning Tab

Lesson 10: Salesforce Administration Datatypes (Fields)

- Standard Fields
- Custom Fields
- System Fields

Lesson 11: Relationships in Salesforce

- Lookup Relationship
- Master Detail Relationship
- External Lookup Relationship

Lesson 12: Page Layout Management

Lesson 13: Field Dependency

Lesson 14: Formula's

Lesson 15: Validation Rules

Lesson 16: Auto Response Rules

Lesson 17: Assignment Rules

Lesson 18: Role Hierarchy

- Introduction to Role Hierarchy
- Role Hierarchy
- Viewing Role Hierarchy
- Creating Roles
- Enabling Field History
- Creating Groups
- Creating Permission Sets
- Assigning Roles to users

Lesson 19: Profiles

- Introduction to Profiles
- Profiles
- Standard Profiles Overview
- Assigning Page Layouts
- Field-Level Security
- Custom App Settings & Access
- Tab Settings
- Record Type Settings
- Administrative Permissions
- General user Permissions
- Standard Object Permissions
- Custom Object Permissions
- Password Policies & Session Timeout
- Login Hours & IP Ranges
- Enabling Apex & Visual Force Access

Lesson 20: Creating an User

Lesson 21: Data Management

- Introduction to Data Management
- Data Management
- Importing Leads
- Importing Contacts & Accounts
- using Mass Delete
- Installing Data Loader
- Importing Records with Data Loader

- Updating Records with Data Loader
- Deleting Records with Data Loader
- Exporting Records with Data Loader
- Adding a Field in the Schema Builder
- Scheduling a Data Export
- Creating & using Sandbox
- Mass Transferring Records
- Reporting Snapshots
- Working with Tags

Lesson 22: Workflows

- Introduction to Workflow Rules
- Workflow Rules
- Creating a Workflow Rule
- Creating a Workflow Rule Field Update
- Creating a Workflow Rule Task Assignment
- Creating a Workflow Rule Email Alert

Lesson 23: Approval Process

- Introduction to Approval Process
- Dynamic Approval Process
- Multi-Step Approval Process
- Parallel Approval Process
- Approval Process Actions

Lesson 24: Security Controls

- Introduction to Security Controls
- Security Controls
- Viewing Object Security
- Changing Default Record Access
- Sharing Settings
- Field Accessibility
- Password Policies
- Session Settings
- Login Flows
- Network Access
- Activations

- Session Management
- Login Access Policies
- Certificate & Key Management
- Viewing Setup Audit Trail
- Executing Expire All passwords
- Delegated Administration
- Remote Site Settings
- Named Credentials
- File Upload & Download Security

Lesson 25: Reports

- Introduction to Reports
- Reports
- Understanding Report Formats
- Creating a Lead Report
- Creating Contacts & Account Reports
- Creating an Opportunity Report
- Adding Leads to a Campaign from a Report
- Creating a Report Chart
- Scheduling Reports
- Creating a Report Chart
- Summarizing Report Data
- Creating a Report Formula
- Exporting Reports to Excel

Lesson 26: Dashboards

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- Understanding Dashboard Components
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- Refreshing a Dashboard
- Modifying Columns on Dashboard
- Adding Filter to Dashboard
- Managing Access to Reports
- Adding a Report as a Dashboard Component
- Setting Up Dynamic Dashboard
- Enabling Dashboard for iPad

- Modifying Report and Dashboard Interfaces
- Activating the Report Builder on Profiles

Lesson 27: Process Builder

Lesson 28: Change Sets & Deployments

- Introduction to change sets & Deployments
- Change Sets & Deployments
- Outbound Change Sets
- Inbound Change Sets
- Deployment Settings
- Deployment Status
- Eclipse IDE

Lesson 29: Communities

- Introduction to Communities
- Communities
- Creating a New Community
- Topic Management
- Recommendations management
- Reputation management
- Adding Members
- Managing Tabs & Branding
- Login & Registration
- Community Preferences

Lesson 30: Help & Training

- Introduction to Help & Training
- Help & Training
- Using Answers
- Using Ideas
- Searching for a help Topic
- Contacting Support
- Trust Site
- Known Issues

Lesson 31: Project Phases

- Project Phase Overview
- Configuration
- Development
- System Integration Testing
- Quality Analysis Testing
- User Acceptance Testing
- Deployment
- Production / Sandbox

Lesson 32: Email Administration

- Email Administration
- Deliverability
- Organization Wide Email Addresses
- Compliance BCC Email
- Test Deliverability
- Delete Attachments sent as Links
- Email Footers

Lesson 33: Mobile Administration

- Installation of Salesforce1 Mobile App
- Salesforce1 Settings
- Mobile Dashboard Settings
- Creating of Lightning Tab

Lesson 34: Domain Management

- Creation of Domain for your Organization
- Domain Settings
- GOOGLE Login
- FACEBOOK Login
- LINKDIN Login

Lesson 35: Quote Templates

Lesson 36: App Exchange

- Introduction to App Exchange
- App Exchange
- App Exchange Overview

- Finding & Selecting an App
- Finding a Developer
- Finding a Consultant

Lesson 37: Chatter

- Introduction to Chatter
- Chatter
- Chatter Overview
- Enabling Chatter
- Enabling Chatter Feeds On Records
- Configuring Chatter Groups
- Creating Customer Groups
- Creating a Free Customer Chatter User
- Customizing Salesforce to Salesforce
- Accepting a Salesforce Connection
- Sharing a Account via Salesforce to Salesforce
- Enabling Ideas
- Configuring Ideas themes
- Enabling Social Accounts
- Enabling Libraries & Content
- Customizing Libraries & Content
- Uploading Documents to Libraries & Content
- Configuring Salesforce l

Lesson 38: Other Topics

- Creation of Customer Portal
- Creation of Omni Channel
- Creating of live Agents
- Creating of SITE.Com

Sales Force Development

Lesson 1: Getting Started with Salesforce Platform

- Understanding Salesforce Platform
- Understanding Salesforce Terminologies
- Multitenancy & Cloud
- Understanding Salesforce Metadata & API
- Understanding Salesforce Architecture
- Declarative Vs. Programmatic Changes & Customizations
- Application Development Tools in Salesforce
- AppExchange as Application Development Strategy
- Finding & Navigating Salesforce Documentation
- Understanding Salesforce Trust

Lesson 2: Building Data Model in Salesforce & Business Process

- Data Model
- Fields
- Relationship Fields
- Junction Object
- Schema Builder
- Business Logic

Lesson 3: Data Management

- Data Management in Salesforce
- Exporting Data

Lesson 4: Introduction to Apex

- Apex
- Apex Development Process
- Apex Development Tools
- Apex Governor Limits

Lesson 5: Data Types & Logic Control in Apex

- Data Types
- Primitive Data Types

- Subject Data Types
- Enum Data Types
- Collections Data Types
- Operations
- Logic Controls Statement

Lesson 6: Apex Classes

- Classes
- Apex Class Variables & Methods
- Access Modifiers
- Class Constructors
- The “this” Keyword
- Inheritance
- Sharing
- Interface
- System Classes & Methods

Lesson 7: Subject Relationships

- API Names of object and field
- Relationship in Apex

Lesson 8: SOQL & SOSL Queries

- Salesforce object Query Language (SOQL)
- SOQL Functions
- SOQL Variable Binding
- SOQL For Loops
- SOQL Keywords
- Relationship Queries
- Salesforce Object Search Language (SOSL)
- SOQL Vs SOSL

Lesson 9: Data Manipulation Language

- Data Manipulation Language(DML)
- Save Result Class
- Transaction Control
- Database DML Options

- DML Operations on Records
- DML & Loops
- SOQL, DML & Governor Limits

Lesson 10: Apex Triggers

- Apex Triggers
- Types of Apex Triggers
- Triggers & Their Execution Order
- Creating & Viewing Triggers
- Basic Trigger Syntax
- Trigger Context Variables
- Understanding Trigger Events
- Trigger Helper Class Pattern
- Bulkfield Trigger
- Handling Recursion in Triggers
- Restrict Save Operations with addError()
- Apex Trigger Best Practices

Lesson 11: Exception Handling

- What are Exceptions?
- Exception Statements
- Types of Exceptions
- Common Exception Methods
- Catching Different Exception Types
- Custom Exception Classes

Lesson 12: Debugging

- What is Debugging?
- What is Logs
- Debug in Developer Console
- Anonymous Blocks

Lesson 13: Testing Strategy

- Apex Unit Tests
- Creating Test Data & Users
- Unit Test Methods

- Unit Test for Governor Limits
- Running Unit Tests
- UI
- Developer Console
- com IDE
- Execute Anonymous Vs Test Classes

Lesson 14: Deployment Strategy

- Requirements for Deploying Apex, Code Coverage
- Deployment Via Change Sets
- com IDE Via ANT Tools
- Workbench
- Application Lifecycle Management

Lesson 15: Visualforce Pages/MVC Pattern

- Tags
- Expression Syntax
- Data Binding
- Action Binding
- Include Static Resources, Java Script, Style Sheets into Visualforce

Lesson 16: Controllers

- Types of Visualforce
- Standard Controllers
- Data Binding
- Traversing Data
- Error Messages
- Actions
- Incorporate VF Into Application
- Custom Controllers
- Why Use Custom Controllers
- Invoking Custom Controllers & Extensions
- Controller Architecture
- Controller Methods
- Action Methods
- Navigation Methods
- Page Reference

- Controller Extensions
- Constructors
- Use in Visualforce Pages
- Deploying Controllers
- Testing Controllers
- Security in Controllers & Visualforce
- Impact of Apex on Declarative Changes

Lesson 1: Introduction & Setup

- Scenario to be developed
- Salesforce (What, Why, Who)?
- Create your own Developer Org
- Create and Enable Custom Domain

Lesson 2: Create Objects, Formulas, Layout & App

- Create Student Object & Fields
- Create Layout for Student Object
- Create Course Object & Fields
- Create Discount Codes Object
- Create Layout for Course Object
- Create Layouts for Discount Codes Object
- Create Enrolment Object
- Create Layout for Enrolment Object
- Create Tabs
- Create New App with Logo

Lesson 3: APEX Trigger

- Create APEX Trigger
- Debug APEX Trigger and Query Editor

Lesson 4: Global Actions

- Create Global Actions

Lesson 5: Reports

- Create new Tabular Reports
- Create new Summary Reports
- Create new Matrix Reports

Lesson 6: Dashboards

- Create new Component for Pie Chart
- Create new Component for Bar Chart
- Create new Component for Funnel Chart
- Create new Component for Lightning Table

Lesson 7: Maintaining Field Dependencies in Pick Lists

- Scenario to be developed – Field Dependencies
- Create Picklist value sets
- Create Field and Maintain dependencies

Lesson 8: Using Record Types in our App to distinguish free and Paid Courses

- Scenario to be Developed – Record Types
- Add different page layouts for courses object
- Create Record Types and assign them to our page layouts

Lesson 9: Using Profiles and Permission Sets

- Scenario to be Developed – Student Profile and Permission Sets
- Creating a New User for Student
- Creating New Student Profile and assigning to student user
- Creating a permission set for added Edit functionality and assigning to user

Lesson 10: Workflow – Immediate & Time-Dependent with Letter Head & Email Templates

- Scenario to be developed – Workflow Rules. Immediate & Time-Dependent Actions
- Modifying Trigger to auto populate students email in Enrolment Object
- Create new letter heads for Welcome message/Review Message to students
- Create new Email Templates for new Enrolment/Reviews
- Add new Workflow Rule – with Immediate Action (Sending Email)

- Add new Workflow Rule – with Time Dependent Action (Sending Email after 3 days)

Salesforce Integration:

Lesson 1: Introduction

Lesson 2: Basic Concepts

- What is a Web service
- SOAP
- REST

Lesson 3: Integrating Using SOAP

- Types of Integrations
- Enterprise or Partner WSDL
- Overview of the Complete Process
- Syntax
- Web services Class
- Authentication Info
- Consuming & Parsing WSDL
- Remote Site Settings
- Building the Connection
- Visualforce Page
- Testing the Connection
- Passing Session Id to Custom Class
- Performing Required Operation

Lesson 4: Integrating Using REST

- Introduction
- Download & Configuring Eclipse
- Authentication Overview
- Configuring Connected App
- Compiling the Required JAR Files
- Defining Variables
- Building the URL
- HTTP Post
- Parsing JSON Response

- Executing the Code

Lesson 5: POST Method to Create Record

- Building POST Method to Create Record
- Building POST Header
- Building POST Body & Executing

Lesson 6: GET Method to Query Record

- HTTPGet to Query Record
- Code

Course Details:

Orbit Online Training's Salesforce Administration Training course will help you pass the Salesforce Administrator Exam (ADM 201) and the Salesforce App Builder (DEV 401) Exam. Concepts on Force.com Platform, AppExchange, SFDC Security Model, Service Cloud, Sales Cloud, Lightning App Builder, Salesforce Reports & Dashboard can be mastered in this Salesforce Training course.

Salesforce CRM has been more user-friendly and economical. The cloud-based applications of Salesforce CRM are intended for sales, services, marketing, productivity, and many more important business operations. It facilitates good software experts, fresh graduates, and beginners as well to easily manage and improve business relationships.

Who can Learn Salesforce?

- This is one of the most common questions raising in many people. It's obvious that guys often misunderstand that Salesforce CRM Admin training is only for IT people. Let us get a clear idea now.
- As you know, CRM stands for Customer Relationship Management. It is nothing but an outstanding software system that is able to manage the customers, sales, profits, products or services, and other important business considerations.
- So, any kind of Retail, Software, Educational, or Commercial Business needs effective CRM systems to meet success and development. Salesforce CRM is a popular cloud-based CRM system. So anyone from any professional or educational background can learn Salesforce CRM. It is really offering lots of job opportunities for technical and non-technical people throughout the world.

ONLINE TRAINING FEATURES

- Real Time Expert Trainers
- Industry Specific Scenario's
- Video Recording Sessions
- Soft Copy of Materials
- Interview Preparation Tips

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Lesson 1: Salesforce Lightning Basics

- Course Overview
- Getting Ready
- Preparing the Org
- Preparing Users
- Rollout Plan
- Lightning Apps
- Custom Lightning App
- Lightning Page Layouts
- Creating Lightning Pages
- Creating App Page
- Creating Record Page
- Creating Home Page
- Editing Lightning Pages
- Assigning Lightning Pages
- Reports and Dashboards
- Creating a Lightning Component
- Using the Components
- AppExchange Components
- Preparing for AppExchange
- Creating a Visualforce Page
- Components in Visualforce
- Enhancing Visualforce Pages
- Adding in Lightning Pages
- Flow in Lightning Pages
- Custom Lightning Pages in Apps

Lesson 2: Hands on Salesforce Lightning Development

- Course Overview
- Developer Edition
- Classic and Lightning Experience
- A Tour of Lightning Experience
- Marketing App
- Sales App
- Service App
- Custom Lightning App
- Creating a Custom Object in Lightning Experience
- Custom Tabs in Lightning Experience
- Custom Fields in Lightning Experience
- Custom Formula Fields in Lightning Experience
- Custom Validations in Lightning Experience
- Page Layouts in Lightning Experience
- Compact Layouts in Lightning Experience
- Data Import Wizard
- Exploring the Lightning App Builder
- Classic App in Lightning Experience
- Creating Lightning Console App
- Creating Sales Path
- Enhancements to “Health Awareness Program” App
- Introduction to the Lightning Process Builder
- Building a Business Process on a Standard Object Account for Creating a Record
- Building a Business Process for Updating Your Contacts
- Understanding the Requirements of Your App
- Introduction to the Cloud Flow Designer
- Understanding the Flow Requirements for Building Your Applications
- Building a “Quick BMI Flow” That Captures, Calculates, and Displays BMI Data
- Create Volunteer Flow

Lesson 3: Complete Salesforce Lightning Application Development

- Course Overview
- About the Project
- Install/Build Salesforce Classic
- Overview of Lightning Experience
- BMI Calculator

- Attributes, Expressions, Value Providers
- Component Bundle
- Client-side Controller
- Global IDs and Local IDs
- Using the Component and Navigation
- What Is SLDS
- SLDS to Lightning Components
- SLDS to Stand-alone Apps
- SLDS to Visual Force Pages
- Server-side Controller
- `force:navigateToComponent`
- Component Composition
- App and Wrapper Components
- Search Bar Component Mark-up
- List and Card Components
- SLDS to the Components
- Apex Method
- Event Reference
- System Event Reference
- Demo on System Events
- Custom Events
- App Event
- Create the App Event
- Register and Fire in Search Comp
- Handle in Seminar List Comp