Salesforce Training

COURSE CONTENT

About Multisoft

Train yourself with the best and develop valuable in-demand skills with Multisoft Systems. A leading certification training provider, Multisoft collaborates with top technologies to bring world-class one-on-one and certification trainings. With the goal to empower professionals and business across the globe, we offer more than 1500 training courses, which are delivered by Multisoft's global subject matter experts. We offer tailored corporate training; project Based Training, comprehensive learning solution with lifetime e-learning access, after training support and globally recognized training certificates.

About Course

Salesforce is one of the world's leading Customer Relationship Management (CRM) platforms, widely used across industries for managing sales, service, marketing, and customer engagement. Multisoft Systems offers a comprehensive Salesforce Training program designed to equip learners with in-depth knowledge and practical skills in Salesforce administration, development, and customization.

Module 1: Salesforce CRM Introduction

- ✓ Define Salesforce and Customer Relationship Management
- ✓ Introduction to Force.com
- ✓ Why we use Salesforce CRM
- ✓ Different Editions of Salesforce
- ✓ Salesforce Registration
- ✓ Building and Customizing Home page, Apps, and Tabs
- ✓ Salesforce Architecture- Multi-tenant and Meta-Data driven.
- ✓ CRM Object Capabilities

Module 2: Quote Templates

- ✓ Introduction to Customer Relationships
- ✓ Introduction to Quote Templates
- ✓ Creating a Quote record and its template
- ✓ Quote PDF

Module 3: Sales Cloud

- ✓ Salesforce Sales Cloud Basics
- ✓ Creating List views and Email Leads
- ✓ Generating and Converting Leads
- ✓ Creating Accounts and Contacts
- ✓ Sending personal and group Emails
- ✓ Creating Campaigns and Activities
- ✓ Creating Opportunities and Products
- ✓ Creating Web-to-Lead Form and Lead Assignment Rule

Module 4: Service Cloud

- ✓ Service Cloud Basics
- ✓ Creating Cases and Case Assignment Rules

✓ Case Escalation Rules

✓ Creating and Activating Solutions

✓ Setting and Enabling Knowledge

✓ Creating web-to-case Form and Email-to-case address

Module 5: SFDC Objects and Fields

✓ Creating Objects, Standard Object Components

✓ Altering and Renaming Standard Objects

✓ External Objects and Custom Objects

✓ Field Types, Field Dependencies

✓ Adding Fields in Objects

✓ Rollup Summary Field

✓ Creating Lookup and Master-Detail Fields

✓ Creating Data and Time Fields

✓ Creating Email and Phone Fields

✓ Creating Text and Text area fields

✓ Creating Currency, Geolocation, and Percent Fields

✓ Creating encrypted and URL Fields

✓ Standard and Formula Fields

Module 6: SFDC Security Model

✓ Organization level or System-level security

✓ Profile and Permission Sets

✓ Administering users

✓ Troubleshooting

✓ Security Settings and Tab Settings

✓ Password Policies and IP Address Security

✓ Field Level Security and Activations

✓ Session Settings and Page Layout Assignment

✓ Role Hierarchy Creation

- ✓ Record Level and Object-level security
- ✓ Public Group and Queue

Module 7: Buttons, Links, and Actions

- ✓ Creating links, buttons, and Actions
- ✓ Creating Custom Links and Custom Buttons
- ✓ Creating and Updating Records with Actions
- ✓ Logging a call through Actions
- ✓ Global Action and Object Specific Action

Module 8: Master-Detail Relationship

- ✓ Hierarchy Relationship
- ✓ Many to Many Relationship
- ✓ User Management
- ✓ Self-Relationship

Module 9: Reports and Dashboards

- ✓ Creating tabular, matrix, and summary reports
- ✓ Importance of Tabular, Summary, and Matrix reports
- ✓ Executing a report, Report Builder, and Report Formula
- ✓ Conventional reports available, report and security
- ✓ Creating: Leads report, Opportunity report, Scheduling report, Campaign report.
- ✓ Using filters in reports
- ✓ Access Management in Reports
- ✓ Creating Dashboards
- ✓ Bucket Field and Dynamic Dashboards
- ✓ Dashboards components
- ✓ Customizing Dashboards (Modifying components and Refreshing Dashboards)
- ✓ Adding reports to the dashboards
- ✓ Adding the leads to the campaigns through reports

✓ Customizing the Interfaces of Dashboards and Reports

Module 10: Chatter

✓ Introduction to Chatter

✓ Enabling Chatter and Configuring Chatter groups

✓ Enabling Chatter feeds on the records.

✓ Email Notification in Chatter

✓ Creating the free customer chatter user

✓ Creating customer groups

✓ Customizing Email Notifications in Chatter

✓ Customizing and Enabling Libraries and Content

✓ Enabling Ideas

✓ Setting Ideas Themes

✓ Activating Social Accounts

✓ Setting Salesforce to Salesforce

✓ Sharing the Account through salesforce to salesforce

✓ Accepting the Salesforce Connection

✓ Setting Salesforce1

Module 11: Mobile

✓ Introduction to Salesforce1 and SalesforceA

✓ Differentiate Salesforce1 and SalesforceA

Module 12: AppExchange

✓ AppExchange Basics

✓ Selecting an App and Custom App Installation

✓ Searching a Developer and a Consultant

Module 13: Workflow Rules

- ✓ Workflow Rules basics
- ✓ Creating a Workflow rule Email Alert
- ✓ Creating a Workflow rule Task Assignment and Field Update
- ✓ Field Updation using Workflows
- ✓ Workflow Actions
- ✓ Introduction to Approval Process
- ✓ Approval Process Automation

Module 14: Business Logic and Process Automation

- ✓ Record types
- ✓ Formula fields
- ✓ Roll-up summary fields
- ✓ Validation rules
- ✓ Approval processes
- ✓ Workflow
- ✓ Visual workflow
- ✓ Process builder
- ✓ Automating business processes
- ✓ Ramifications of field updates and potential for recursion

Module 15: Salesforce Lightning

- ✓ Lightning Components
- ✓ Capabilities of Lightning Components
- ✓ VisualForce vs. Lightning Components
- ✓ Implementing Lightning Web Components in Salesforce

Module 16: User Interface

- ✓ User Interface Overview

✓ User Interface General, Calendar, Sidebar, and Setup options

✓ User Interface Name Settings

✓ Dynamically Updating the UI components.

Module 17: Deployment and Change Sets

✓ Introduction to Deployment and Change Sets

✓ Inbound and Outbound Change Sets

✓ Deployment Settings and Status

Module 18: Application Life Cycle

✓ Application LifeCycle Basics

✓ Important considerations and Milestones

✓ Using Sandboxes in the App Development

✓ Using Change sets

✓ Packages

Module 19: Web Services and Integration

✓ Introduction to web services and integration

✓ Importance and kinds of web services

✓ JSON class, Generator class, parser, and serialization

✓ JSON Deserialization

✓ XML classes

✓ Creating APEX WSDL File

✓ Integration through SOAP and REST API

✓ Integration using GCP

Module 20: Advanced Automation

✓ Limitations of Workflow rules

✓ Workflow vs. Process Builder

- ✓ Benefits of Process Builder
- ✓ Record update ·
- ✓ Email alert
- ✓ Chatter post
- ✓ Visual Workflows AKA Flows
- ✓ Screens
- ✓ Condition check
- ✓ Outcomes
- ✓ DML by Flows
- ✓ Login flows

Module 21: Analysing Data with Reports and Dashboards

- ✓ Introducing Reports
- ✓ Tabular Reports
- ✓ Summary Reports
- ✓ Matrix Reports
- ✓ Joined Reports
- ✓ Report Formats
- ✓ Introducing Dashboards
- ✓ Adding Dashboard Components
- ✓ Dynamic dashboard
- ✓ Regular dashboard
- ✓ Dashboard security
- ✓ Types of report sharing
- ✓ Types of Dashboards sharing
- ✓ Report security
- ✓ Bucket fields
- ✓ Custom Reports Types
- ✓ Formula fields