

Salesforce



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MODULE 01 - INTRODUCTION TO SALESFORCE

- Introduction to Salesforce

MODULE 02 – SALESFORCE OVERVIEW

- Salesforce
- Salesforce Overview
- Introduction to Salesforce
- Salesforce Editions
- Home Page Customization
- User Management
- Creating and Customizing Tabs
- Creating an App
- Uploading a Company Logo
- Company Information Page
- System Overview Page
- Updating the Fiscal Year
- Quiz
- Case Study
- Case study Demo
- Key Takeaways
- Conclusion

MODULE 03:- SALES CLOUD

- Introduction to Sales Cloud
- Sales Cloud
- Leads Home Page



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- Creating List Views
- Creating and Converting Leads
- Creating Accounts
- Creating Contacts
- Creating Email Templates
- Sending Individual Emails
- Sending Mass Emails
- Creating and Managing Price Books
- Creating Products
- Creating Opportunities
- Creating Activities
- Creating a Web-to-Lead Form
- Creating a Lead Assignment Rule
- Creating a Lead Queue
- Sending Mass Emails
- Creating an Auto-Response Rule
- Creating Campaigns
- Record Types
- Quiz
- Case Study 1
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- Case Study 2
- Case Study Demo 2
- Key Takeaways
- Conclusion



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MODULE 04 - QUOTE TEMPLATES

- Introduction to Quote Templates
- Quote Templates
- Creating a Quote Record
- Creating a Quote Template
- Generating a Quote PDF
- Emailing a Quote PDF
- Modifying Quote Templates
- Quiz
- Case Study
- Case Study Demo
- Key Takeaways
- Conclusion

MODULE 05 – SERVICE CLOUD

- Introduction to Service Cloud
- Service Cloud
- Creating Cases
- Creating Case Assignment Rules
- Creating Case Escalation Rules
- Enabling Solutions
- Creating Solutions
- Attaching Solutions to Cases
- Enabling Knowledge
- Configuring Knowledge
- Creating a Web-to-Case Form



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- Creating an Email-to-Case Address
- Quiz
- Case Study 1
- Case Study 1 Demo
- Case Study 2
- Case Study 2 Demo
- Key takeaways
- Conclusion

MODULE 06 – FIELD TYPES

- Introduction to Field Types
- Field Types
- Modifying Standard Fields
- Creating Auto-number Fields
- Creating Formula Fields
- Creating Roll-Up Summary Fields
- Creating Lookup and Master Detail Fields
- Creating Checkbox Fields
- Creating Currency, Number, and Percent Fields
- Creating Date Field and Date and Time Fields
- Creating Phone and Email Fields
- Creating Geolocation Fields
- Creating Picklist and Multi-Select Picklist Fields
- Creating Text and Text Area Fields
- Creating Text Area Long and Text Area Rich Fields
- Creating Encrypted Fields
- Creating URL Fields



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- Quiz
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MODULE 07 – SALESFORCE OBJECTS

- Introduction to Salesforce Objects
- Salesforce Objects
- Standard Object Components
- Renaming Standard Objects
- Modifying Standard Objects
- Understanding External Objects
- Creating Custom Objects
- Quiz
- Case Study
- Case Study Demo
- Key Takeaways
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MODULE 08 – CREATING BUTTONS, LINKS, AND ACTIONS

- Introduction to Creating Buttons, Links, and Actions
- Creating Buttons, Links, and Actions
- Creating New Records with Actions
- Logging a Call with Actions



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- Updating a Record with Actions
- Creating Custom Buttons
- Creating Custom Links
- Quiz
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MODULE 09 – VISUAL WORKFLOW, PROCESS BUILDER, AND SCHEMA BUILDER

- Schema Builder
- Introduction to Visual Workflow, Process Builder, and Schema Builder
- Visual Workflow, Process Builder, and Schema Builder
- Creating a Visual Flow
- Modifying Existing Flows
- Creating a Process in the Process Builder
- Creating Fields in the Schema Builder
- Quiz
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MODULE 10 – VALIDATION RULES

- Introduction to Validation Rules
- Validation Rules
- Creating Validation Rules
- Creating Formulas
- Creating Error Messages
- Quiz
- Case Study
- Case Study Demo
- Key Takeaways
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MODULE 11 – WORKFLOW RULES

- 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
- Quiz
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MODULE 12 – LIGHTNING COMPONENTS

- Introduction to Lightning Components
- Lightning Components
- Installing Lightning Components
- Lightning Component Capabilities
- Lightning Components vs. Visualforce
- Quiz
- Case Study
- Case Study Demo
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MODULE 13 – 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
- Quiz
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MODULE 14 – 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 and Key Management
- Viewing Setup Audit Trail
- Executing Expire All Passwords
- Delegated Administration
- Remote Site Settings
- Named Credentials
- File Upload and Download Security
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MODULE 15 – PROFILES

- Introduction to Profiles
- Profiles
- Standard Profiles Overview
- Assigning Page Layouts
- Field-Level Security
- Custom App Settings and Access
- Tab Settings
- Record Type Settings
- Administrative Permissions
- General User Permissions
- Standard Object Permissions
- Custom Object Permissions
- Password Policies and Session Timeout
- Login Hours and IP Ranges
- Enabling Apex and Visualforce Access
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MODULE 16 – 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 Chatter Email Notifications
- Configuring Salesforce to Salesforce
- Accepting a Salesforce Connection
- Sharing an Account via Salesforce to Salesforce
- Enabling Ideas
- Configuring Ideas Themes
- Enabling Social Accounts
- Enabling Libraries and Content
- Customizing Libraries and Content
- Uploading Documents to Libraries and Content
- Configuring Salesforce
- Quiz
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MODULE 17 – REPORTS

- Introduction to Reports
- Reports
- Understanding Report Formats
- Creating a Leads Report
- Creating Contacts and Accounts Report
- Creating an Opportunity Report
- Adding Leads to a Campaign from a Report
- Creating a Report Chart
- Scheduling Reports
- Creating a Campaign Report
- Summarizing Report Data
- Creating a Report Formula
- Exporting Reports to Excel
- Quiz
- Case Study 1
- Case Study 1 Demo
- Case Study 2
- Case Study 2 Demo
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MODULE 18 – DASHBOARDS

- Introduction to Dashboards
- Dashboards
- Understanding Dashboard Components



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- Creating a Dashboard
- Refreshing a Dashboard
- Modifying Columns on Dashboards
- Adding Filter to Dashboard
- Managing Access to Reports
- Adding a Report as a Dashboard Component
- Setting Up Dynamic Dashboards
- Enabling Dashboards for iPad
- Modifying Report and Dashboard Interfaces
- Activating the Report Builder on Profiles
- Quiz
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MODULE 19 – DATA MANAGEMENT

- Introduction to Data Management
- Data Management
- Importing Leads
- Importing Contacts and 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



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- Adding a Field in the Schema Builder
- Scheduling a Data Export
- Creating and Using Sandbox
- Mass Transferring Records
- Reporting Snapshots
- Working with Tags
- Quiz
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MODULE 20 – APP EXCHANGE

- Introduction to AppExchange
- AppExchange
- AppExchange Overview
- Finding and Selecting an App
- Finding a Developer
- Finding a Consultant
- Quiz
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MODULE 21 – COMMUNITIES

- Introduction to AppExchange
- AppExchange
- AppExchange Overview
- Finding and Selecting an App
- Finding a Developer
- Finding a Consultant
- Quiz
- Case Study
- Case Study Demo
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MODULE 22 – CHANGE SETS AND DEPLOYMENT

- Introduction to Communities
- Communities
- Creating a New Community
- Topic Management
- Recommendations Management
- Reputation Management
- Adding Members
- Managing Tabs and Branding
- Login and Registration
- Community Preferences
- Quiz
- Case Study



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- Case Study Demo
- Key Takeaways
- Conclusion

MODULE 23 – CHANGE SETS AND DEPLOYMENT

- Introduction to Change Sets and Deployment
- Change Sets and Deployment
- Outbound Change Sets
- Inbound Change Sets
- Deployment Settings
- Deployment Status
- Eclipse IDE
- Quiz
- Case Study
- Case Study Demo
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MODULE 24 – USER INTERFACE

- Introduction to User Interface
- User Interface
- User Interface General Options
- User Interface Sidebar Options
- User Interface Calendar Options
- User Interface Name Settings
- User Interface Setup Options



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- Quiz
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MODULE 25 – APPLICATION LIFECYCLES

- Introduction to Application Lifecycles
- Application Lifecycles
- Key Milestones and Considerations
- Using Sandboxes for Development
- Using Change Sets
- Using Unmanaged Packages
- Quiz
- Case Study
- Case Study Demo
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MODULE 26 – HELP AND TRAINING

- Introduction to Help and Training
- Help and Training
- Using Answers
- Using Ideas
- Searching for a Help Topic
- Contacting Support



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- Trust Site
- Known Issues
- Quiz
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