

Salesforce

Course Content



ADMIN

Introduction to CRM:

- Why CRM?
- Introduction to Cloud Computing & Salesforce.com
- Cloud Computing - Overview
- What is Software-as-a-Service (SAAS)?
- What is Platform-as-a-Service (PAAS)?
- What is Infrastructure-as-a-Service (IAAS)?

What is Salesforce.com?

- Salesforce.com CRM Editions
- Salesforce Architecture – Cloud Computing is a Better Model Multi-tenant
- Salesforce Editions / Pricing

Salesforce.com Navigation - Overview:

- Salesforce Certifications
- Certified Force.com Developer(401)
- Certified Administration (201)
- Certified Advanced Force.com Developer(501), etc.,

Database Introduction:

- Database Model - Object Creation
- Salesforce Building Blocks
- Standard Objects

- Create custom Objects
- CRM functionality in Salesforce and use of standard objects
- Custom Objects Vs. Standard Objects
- Create custom Fields
- Create custom Tabs

Types of Tab:

- Standard Objects – Account, Contacts, Leads, Campaigns, Opportunities etc.,
- Custom object Tabs
- Web Tabs
- Visual force Tabs

Custom Application:

- Limitations
- Field Creation and its Relationships a. Different Data types
- Standard Data types :
 1. Text, Email, Number, Currency, URL, Text Area.
 2. Storage Limitations
- Read only Data types:
 1. Auto Number, Formula and Rollup summary
 2. Rollup summary Operations
 3. Sum(), Min(), Max() and Count

Relational Data types:

- Lookup Vs. Master - Detail Relationship
- Limitations
- Required, External Id, Default Value and Unique fields

Salesforce Application elements: Home Page, Tabs, Tab Home Pages, Detail Page, Side Bar, Apps, Record

Page Layouts:

- Defining Page layouts
- Field order changes
- Adding custom buttons and links
- Defining required and read only fields
- Adding related list

Record Types:

- To create and maintain record types for your organization.
- Display different page layouts and picklist values based on record types.
- Uses of Record Types

Field Dependencies:

- Controlling field/Dependent field?
- Making dependent pick list fields
- Limitations

Validation Rules:

- Defining Salesforce Data Validation
- Creating Custom Validation Rules
- Validation Vs. Trigger

Workflow rules:

- Define workflow
- Create Email template
- Set up workflow rules
- Set up workflow actions

Workflow Approval process:

- Plan approvals using workflow
- Use the approval wizard – standard vs. jump start
- Create workflow approvals

Email Templates:

- Email Templates – Sending Single emails and Mass emails.
- Types of Templates - HTML (Using Letter Head) , Custom HTML (without using letter head), Visual force Email Te

Data Management:

- Import Wizard Vs Data Loader
- Importing Overview
- Exporting Overview
- Import custom object records using the Data Loader
- Use mass delete
- Use storage

Personal Setup:

- Managing Personal Information
- Password Reset
- User Management Overview
- Roles, Users, Profiles & Sharing

Users, Roles and Profiles:

- Creating Users
- User Licenses Overview
- Understanding Record Ownership and Access
- Role Hierarchy
- Profiles

1. Overview and different profiles
2. User Permissions

Security:

- Managing the Users
 - Set Organization Wide Defaults (OWD)
 - Object-level Security
 - Field-level Security
 - Record-level Security
 - Sharing Rules
1. Define Sharing rules
 2. Discuss about types of sharing rules

Reports & Dashboards

AppExchange:

- Installing an App
- Uninstalling an App

Development

Introduction to oops concepts

MVC Architecture:

- Model
- View
- Controller

Apex Programming Overview:

- CSS Introduction

JavaScript Introduction:

- Internal
- External

Static Resources:

- Adding External CSS files to the static resources
- <apex: stylesheet/>
- Adding External Javascript files to the static resources
- <apex: includescript/>

Apex Class Creation – Calling

- Defining Class

- Access Specifiers
- Method Declarations
- Debugging results
- Naming conventions & Code Commenting

Data Types:

- Primitives
- Collections (List, Set and Map)
- Subject

Controllers:

Standard Controller

- Record setvar

Custom Controller

- SOQL Query – Query data with SOQL and place them on Pages
- Custom Save Functionality
- With Sharing class Vs. without Sharing Class
- User mode Execution Vs. System mode Execution

Extensions

- Save - Standard controller with extension sample

Wrapper Classes:

- Display multi object data
- Adding check boxes to the data and perform related operations

View State:

- Inner Queries & Relational Queries

Triggers:

- Trigger Events
- Trigger Overview
- Defining Triggers in Salesforce

Trigger Context variables

Ajax Components & its related components:

- Action Function
- Action Support
- Action Region

- Action Pollar
- Action Status
- Rerender
- Render
- Facet
- Outputpanel

Packages:

- Package Overview
 - Defining packages
 - Package Types
1. Managed
 2. Unmanaged
- Managed Vs Unmanaged Packages

Force.com Sites – Public website Building:

- Building public websites for the external Users

Batch Apex:

- Batch apex Use and its Methods

Scheduling Apex:

- Scheduling apex Use and its Methods
- Limitations

Different sandboxes:

- Sandbox Vs. Production Environments
- Change sets
- Limitations

- **Salesforce Developer Course content**
MVC Architecture of Salesforce

Introduction to Salesforce, understanding the MVC Architecture, overview of Salesforce 501, the Visualforce MVC Model, defining Collections, Sets, declaring a Set and using in Operation, list method in Salesforce and understanding Map.

Introduction to JavaScript

Using JavaScript in Visualforce pages, deploying Salesforce Object Query Language, using Query Editor for editing queries, working with Iterators on multiple objects, generating a Query.

Salesforce Apex Data

Understanding the Salesforce Apex language, Apex Data Types, introduction to Apex Triggers, importance of Triggers, Trigger – before and after use cases, types of Triggers, the Trigger operations, understanding the Trigger context, writing Triggers, generating error messages, old and new Trigger.

Triggers Overview

The various scenarios in which Triggers can be fired, understanding Insert Trigger, Update Trigger, working with After Update & After Insert Trigger, relationship between Accounts, Contacts & Opportunities in Salesforce, updating account records, mapping account IDs, comparing Trigger.newmap and Trigger.oldmap.

Introduction to Wrapper Classes

Understanding Salesforce Wrapper Classes, various Class methods and data structures, properties of Wrapper Classes, the test classes in Salesforce, executing Apex Class.

Understanding Developer Console

Introduction to Salesforce Developer Console, IDE for creating, testing and debugging applications, checking and executing Salesforce Test Classes, making changes in Classes, working with Eclipse platform and Plugin, scheduling a custom-level class.

Apex Scheduling

Scheduling Apex Classes using Apex Scheduler, writing Apex Classes that implement Sscheduleable Interface, monitoring and stopping execution of Scheduled Apex Jobs, understanding the concept of Visualforce Pages.

Standard/Custom Controller

Understanding of Standard and Custom Controllers in Salesforce, the concepts and differences between the two, working with Standard Controller, validation rules and controller actions, building a Custom Controller, designing a new Visualforce Page and Account, HTML Tags in Salesforce, learning Apex programming.

Understanding Standard Controller

Deep dive into Standard Controllers, learning about Salesforce Objects – Standard and Custom Objects, creation of new Apex Page in accounts using programming, extending the controllers, understanding Debug and Apex Debug Log, the Apex:param Tag, Output Link and Apex:command Link, defining the Rendered Function.

Exception Handling in Apex

Understanding how to handle error exceptions in coding, working with Standard & Custom Objects, setting up Master-Detail relationship, designing Custom Controller with coding, creating Wrappers, statement updating, understanding the Try and Catch function for exception handling in Apex.

Introduction to Ajax Components

Understanding the Ajax components, the various options in Visualforce Pages, inline Visualforce page, inserting buttons and links, deploying Custom Label for alert messages, page loading, introduction to Triggers, custom fields and custom settings, data access from internal & external memory, coding best practices, understanding Declaration & Initialization, understanding Nullified Triggers, Apex Transactions.

Usage of Batch Apex

Introduction to Salesforce Batch Apex concept, defining the Batch Apex, Command Button and Apex Output Link, the significance of Batch Apex for working with large number of records, the important steps, start, execute and finish, understanding Dynamic Query and Query Locator, calling an Apex Batch, studying the Try Catch Finish Method, understanding the Synchronous and Asynchronous transactions, Style Tag, deploying JavaScript in Visualforce Page, value passing from one Visualforce Page to another.

Introduction to Salesforce Lightning

Salesforce Lightning collection of tools and technologies, modern user interface for speed optimization, Lightning Experience, building reusable components to customize Lightning Experience, Salesforce1 Mobile App.

Salesforce1 Lightning Process Builder

Introduction to Salesforce1, action layouts for Salesforce1, Lightning Process Builder, creating process using visual layout, create whole process rather than using multiple workflow rules, process for working together in one UI for different users.

Salesforce Account Sign-up

Two types of free accounts, lifetime free developer account, 30 days trial production account, understanding how to sign up for the lifetime free developer account, account creation at <https://developer.force.com>.

Salesforce domain Sign-up

Creation of custom domain in Salesforce, defining of custom domain name for the organization at <https://<myDomain>.lightning.force.com>, testing the domain, event driven lightning framework, Aura Framework, deploying the domain, using Developer Console, creating Lightning Components.

Using HTML and CSS style

Using CSS and HTML for styling Lightning Components, referencing Components in Lightning App, creating CSS file in Developer Console, linking to Lightning Component, uploading external style sheet to static resource.

Component attributes

Understanding what attributes are, member variables in Apex Class, typed fields on a specific instance of a component, referencing from within Component's markup using expression syntax, making components dynamic with attributes, using `aura:attribute>` tag to add attribute to component or app.

Lightning Functions

Understanding client side controller, defining functions, binding to components, passing value to functions and other JavaScript based operations, defining attribute in application, referencing component in application.

Composition of Components

Creating fine-grained components in larger components, fitting components together, creating simple components like `c:LC` and `c:LC2`, creating wrapper component `c:wrappercomp` containing simple components.

Conditional Statements

The IF Else conditional statement, `aura:if`, `isTrue` expression, instantiating components in either its body or the Else attribute.

Value Providers

Accessing data using Value Providers, encapsulating related value together, the value providers for a components `v` (view) and `c` (controller).

Out of the box components

Using out-of-the-box components for Salesforce1, Lightning Experience, Lightning Apps, components belonging to different namespaces, Aura, Force, force Chatter, force Community, lightning design system styling, lightning namespace components, user interface.

Common UI and UI namespace

Understanding common UI, using `aura:component`, UI components such as `ui:input` and `ui:output`, easy handling of common UI, component styling and extension.

UI component dynamic update

Dynamically updating UI components, JavaScript controller actions for firing events in Lightning Component Framework, event declaration using `aura:event` tag in a `.evt` resource.

Event handling

Event-driven programming using JavaScript, Java Swing, the component event and application event, writing handlers in JavaScript controller actions.

Server side controller

Creating server side controller in Apex, `@Aura Enabled` annotation, annotation to enable client and server-side access to controlled method, calling a server-side controller action from a client-side controller.

Hands on example of Server side controller

A real example of deploying Server side controller by pulling data from Opportunity object, creating Client side

controller to invoke Server side controller and passing the returned value to components.

Building Lightning Application

Building Contact Management App on Lightning Framework, uploading CSS file and uploading it to static resource for referencing in application, creating contact Controller Apex Class, pulling data from contact and returning the list of contacts, designing User Interface by using HTML and CSS Classes provided in Bootstrap Style sheet.



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