



Salesforce

COURSE SYLLABUS

The Salesforce logo, which includes the word 'salesforce' in its characteristic lowercase, rounded font, is centered within a large, solid blue cloud-like shape. The cloud has several rounded lobes, giving it a soft, organic appearance.



Salesforce

- Understanding Salesforce
- Why to use Salesforce
- Various Salesforce Modules
- Salesforce Data Model and Navigation methods
- Creating a simple HTML Document
- Viewing HTML Document with Browsers
- Introduction to different Web Browsers – IE, Chrome, Mozilla, Safari, UC Browser
- Webpage Vs Website
- URLs / Domains
- Web Servers and Web Hosting

Configuring Salesforce

- Understanding and Managing Company Profile Settings User Interface – Configuration
- Configuring Activities and Calendars
- Understanding and Configuring Search Settings Understanding and Setting Chatter Groups
- Accessing Salesforce for Mobile with Salesforce1

Managing Users

- Understanding and managing User Profiles Managing Users in Salesforce
- Understanding Chatter Free Users and Invites Understanding and Troubleshooting Login Issues

Managing Data Access and Security

- Understanding Users and Profiles
- Understanding Roles and Permission Sets Understanding Sharing Rules
- Controlling User Logins
- Understanding Standard Objects and Custom Objects Controlling Object Access
- Understanding Groups and Teams
- Managing Field Level Security



Customizing Objects

- Standard Fields and Custom Fields Managing Standard Fields
- Creating Custom Fields
- Pick lists and Lookup fields
- Understanding and Creating Fields with Formulas
- Understanding Business Processes
- Understanding Record Types
- Working with Page Layouts
- Ensuring Data Quality

Data Management in Salesforce

- Getting data from different sources
- Understanding Import Wizards
- Working with Data Loader and Data.com
- Handling Mass Transfer of Data
- Backup and Restoring Data

Generating Reports and using Dashboards

- Introduction to Reports and Dashboards
- Understanding and using Report Builder
- Creating New Reports
- Modifying Reports
- Using Report Filters
- Using Formulas in Reports
- Using Visual Summaries
- Printing Reports, Exporting Reports and emailing Reports Building and Managing Dashboards



Workflow and Process Automation

- Understanding and using Process Builder Creating and Managing Workflow Rules Using Email Templates
- Understanding the Support Process Customizing Support Process
- Managing Support Cases and Resolving Automating the Support Process
- Using the Salesforce Console for Service

Managing Support

- Understanding the Capabilities of Core CRM Objects Limitations of Declarative Customizations
- Understanding when to use Programmatic Customizations Creating the required Data Model
- Defining Relationship Types and Impact on the Record Access

Platform App Builder: Declarative Development (DEX-402)

Declaratively Building a Data Model

- Understanding the Capabilities of Core CRM Objects Limitations of Declarative Customizations
- Understanding when to use Programmatic Customizations Creating the required Data Model
- Defining Relationship Types and Impact on the Record Access



More on Data Model

- Changing the Field Types
- Understanding and using Schema Builder Importing and Exporting Data
- Handling External Objects

Building User Interface

- Understanding the Customization Options Creating Custom Buttons, Links and Actions Understanding List Views
- Exploring Record Types
- Exploring Social Features
- Following Best Practices for UI Design

Developing Business Logic

- Understanding Formula Fields
- Advantages of Formula Fields Understanding Summary Fields and Types Creating and managing Validation Rules

Managing Data Security

- Restricting Object Access
- Restricting Record and Field Access
- Extending Access to Object, Record and Field Providing appropriate Solutions for Sharing Data



Business Process Automation

- Understanding Process builder in Salesforce
- Working with Lightning Process Builder
- Using Workflows for Process Automation
- Implementing Approvals in Workflows
- Exploring Business Process Automation Managing Field Updates
- Understanding and Implementing Recursion

Deploying App

- Understanding the Application Life Cycle in Salesforce
- Working with Sandboxes
- Working with Change Sets
- Understanding Managed and Unmanaged Packages
- Creating and Implementing a suitable Deployment Plan

Working with Advanced UI Components

- Creating Reports using Advanced UI
- Understanding Various Report Types
- Creating and Managing Dashboards
- Incorporating Lightning Components using Declarative Options Customizing Salesforce User Interface using Declarative Options

Limitations of Declarative Option

- Understand the Limitation of Declarative Tools Necessity for Programmatic solutions Understanding AppExchange
- Using Apps from AppExchange



Platform Developer: Programmatic Development using APEX and Visual force (DEX-450)

Working with Objects and Fields

- Understanding Objects in Salesforce Platform Various types of Objects
- Understanding Standard Objects Understanding Custom Objects
- Creating and Managing a Custom Object Creating and Managing Custom Fields
- Create Fields with Relationships

More on Custom Objects

- Need for Formula Fields
- Understanding and Creating Custom Formula Fields Understanding roll-up Summary
- Creating Fields with Roll-up Summary
- More on Record types
- Understanding the capabilities of Record Types

APEX Programming

- Introduction to APEX Platform
- Understanding Apex Builder, Apex API and Apex Code
- Key Aspects to understand about Apex
- How Apex is unlike other Programming Languages like Java, C#
- Understanding Apex Development Process
- Write and execute a Simple Apex Code
- Using Variables and Data Types in Apex
- Understanding the sObject Data Type
- Understanding Primitive Data Types
- Understanding and working with Control Statements in Apex
- Understanding Governor and Governor Limits for Apex Transactions



Using Classes in Apex

- Understanding Classes and Objects
- Using Class Variables and Methods
- Understanding Constructors and Access Modifiers
- Understanding Interfaces
- Understanding and using Keywords and Annotations

The Salesforce Object Query Language (SOQL)

- Understanding SOQL
- Writing basic Queries using SOQL
- Writing Dynamic Queries
- Understanding Relationship Queries
- Understanding Parent-Child Relationships
- Understanding Queries that traverses
- Traversing Child to Parent Relationship with Queries
- Traversing Parent to Child Relationship with Queries

Exploring Data Manipulation Language (DML)

- Understanding What is DML statements
- Using DML statements to Insert, Update, Delete, Merge records
- Different method to Invoke DML statements using Apex
- Writing Apex Code to perform Data Manipulation

Understanding Triggers

- Understanding Triggers and its advantages
- Understanding Syntax of a Trigger



- Understanding Before and After Triggers Understanding Bulk Triggers
- Understanding Trigger Exceptions
- Operations that will not Invoke Triggers Understanding and Using Trigger Context Variables

Strategically Designed Triggers

- Understanding List Declarative Mechanisms
- Understanding to implement Complex Business Logic using Triggers
- Methods to improve Programming Solutions using the Declarative Functionality

Apex Transactions and Triggers

- Understanding the Triggers Order of Execution
- How Order of Execution Impact on Triggers Understanding the Lifecycle of an Apex Transaction Understanding the Lifecycle of Static Variables

Debugging Apex Code

- Understanding the Debug Logs Debugging API Calls
- Understanding Exception statements Exploring built in Exception
- Creating Custom Exceptions

Testing Apex Code

- Understanding Testing in Apex
- Why to Test
- Understanding the Apex Test Framework
- Understanding Apex Unit Testing
- Understanding the Test Class and Test Methods
- Understanding Code Coverage percentages
- Understanding the Test Data
- Creating and Running an Apex Test



Strategies for Testing

- Understanding the Best Practices for Writing code to Manage it efficiently
- Writing Efficient Codes to work with databases

Working with Visualforce Pages

- Understanding a Visualforce Page
- Referencing a Standard Controller in a Visualforce Page Displaying data in a Visualforce Page
- Launching Visualforce Page

Controller and View Layers

- More on working with Visualforce Pages
- Displaying Data
- Working with Standard Controller Actions

Understanding Custom Controllers and Extensions

- Understanding Controller Extensions
- Creating a Custom Controller
- Defining Properties for the Custom Controller Creating Custom Methods
- Invoking Custom Methods



Working with SOSL Queries in Visualforce

- Understanding the Standard List Controller Creating a SOSL query
- Understanding the need for Custom List Controller Creating and managing Custom List Controller

More on Visualforce

- Exploring possibility of a Declarative Solution for a Problem
- Understanding the common Governor Limits
- Understanding the Security Limits and Concerns
- Testing the Visualforce Controllers
- Understanding How Visualforce Controllers interact with Views
- Writing test for Controllers, action methods, Getters and Setters, Properties



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