

Salesforce Course Content

1. Introduction to Salesforce

- What is Salesforce?
- Overview of Salesforce products (Sales Cloud, Service Cloud, Marketing Cloud, etc.)
- Understanding Customer Relationship Management (CRM)
- Salesforce's cloud computing architecture (SaaS, PaaS)
- Key features of Salesforce (standard objects, automation, reporting)

2. Salesforce Basics

- Salesforce ecosystem overview
- Navigating the Salesforce interface (Lightning vs. Classic)
- User roles and profiles in Salesforce
- Introduction to standard objects:
 - Leads, Accounts, Contacts, Opportunities, Cases
- Record types and page layouts
- Salesforce AppExchange: using third-party apps

3. Salesforce Data Model and Objects

- Understanding Salesforce objects (Standard and Custom Objects)
- Data types and fields (standard, custom fields)
- Relationships in Salesforce:
 - Lookup relationships
 - Master-detail relationships
 - Many-to-many relationships (junction objects)
- Schema builder and object management

4. Managing Data in Salesforce

- Data import and export tools (Data Loader, Import Wizard)
- Data management best practices:
 - Managing duplicates
 - Data validation rules
 - Creating and managing list views
- Using data filters and reports

5. Automation Tools in Salesforce

- Introduction to Salesforce automation

- Using Workflow Rules:
 - Field updates, email alerts, task creation
- Process Builder:
 - Automating business processes
 - Creating criteria-based actions
- Flow Builder:
 - Automating more complex business processes
 - Building screen flows, record-triggered flows
- Approval processes:
 - Setting up multi-step approvals

6. Salesforce Security and Access

- Understanding Salesforce's security model
- Profiles and permission sets:
 - Controlling user access to records and fields
- Role hierarchy and sharing rules
- Organization-wide defaults (OWD)
- Field-level security
- Setting up login and session settings

7. Reports and Dashboards

- Creating and managing reports:
 - Custom reports and report types
 - Report filters, groupings, and summary fields
- Report formats: Tabular, Summary, Matrix, and Joined reports
- Creating and customizing dashboards:
 - Using dashboard components (charts, metrics, gauges)
 - Building dynamic dashboards for real-time data
- Scheduling reports and dashboards for automated delivery

8. Salesforce Sales Cloud

- Overview of Sales Cloud for sales teams
- Managing leads, accounts, and opportunities
- Lead conversion process and sales pipeline
- Creating campaigns and tracking marketing ROI

- Forecasting sales with opportunity stages
- Territory management and lead assignment rules

9. Salesforce Service Cloud

- Overview of Service Cloud for customer support
- Managing cases, solutions, and knowledge base
- Creating service-level agreements (SLAs)
- Case assignment rules and escalation
- Using email-to-case, web-to-case functionality
- Implementing customer communities for self-service

10. Customizing Salesforce

- Introduction to Salesforce customization
- Creating custom objects and fields
- Customizing page layouts and record types
- Formula fields, validation rules, and roll-up summary fields
- Using custom tabs and apps
- Managing picklist values and record types