

- 1) What is Computer
- 2) What is Program
- 3) What is the language
- 4) Instruction, Command , Program , Package , ERP , CRM , AI , ML

- Dos
- Unix
- Windows
- MS-Office (Word,Excel,PowerPoint,Access)
- C, C++
- dBase
- FoxPro
- FoxBASE
- Java
- Oracle
- Tally
- ERP
- JavaScript
- Visual Basic
- Visual C++
- Python

Where are we now 😊

- Bigdata
- Hadoop
- Data Science
- Machine Learning
- Artificial Intelligence
- Business Intelligence
- CRM
- RPI
- Alexa

What is SALESFORCE?

SFDC or SALESFORCE.COM is a company founded in 1999 by Mr. Marc Benioff @ California

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Three types of users are there in market

- I. **Vendor: Who develop software like Oracle, Microsoft, Google etc.**
- II. **Software Development companies: (use this software to develop applications) like TCS , Wipro , Facebook.**
- III. **End user: Banks, individual person, Companies who use these applications.**

- What is Cloud
- What is Cloud Computing
- Types of Clouds
 - Private
 - Public
 - Hybrid
- Services of Cloud
 - IaaS (Infrastructure as a Service)
 - PaaS (Platform as a Service)
 - SaaS (Software as a Service)
- Advantages of Cloud
- Service Providers
 - Salesforce.com
 - Microsoft-Dynamics
 - Amazon S3,
 - Google-Azure etc.
- Advantages of Salesforce.com over other Service Providers.

Cloud computing is the on-demand availability of computer system resources, especially data storage and computing power, without direct active management by the user.

The term is generally used to describe data centers available to many users over the Internet.

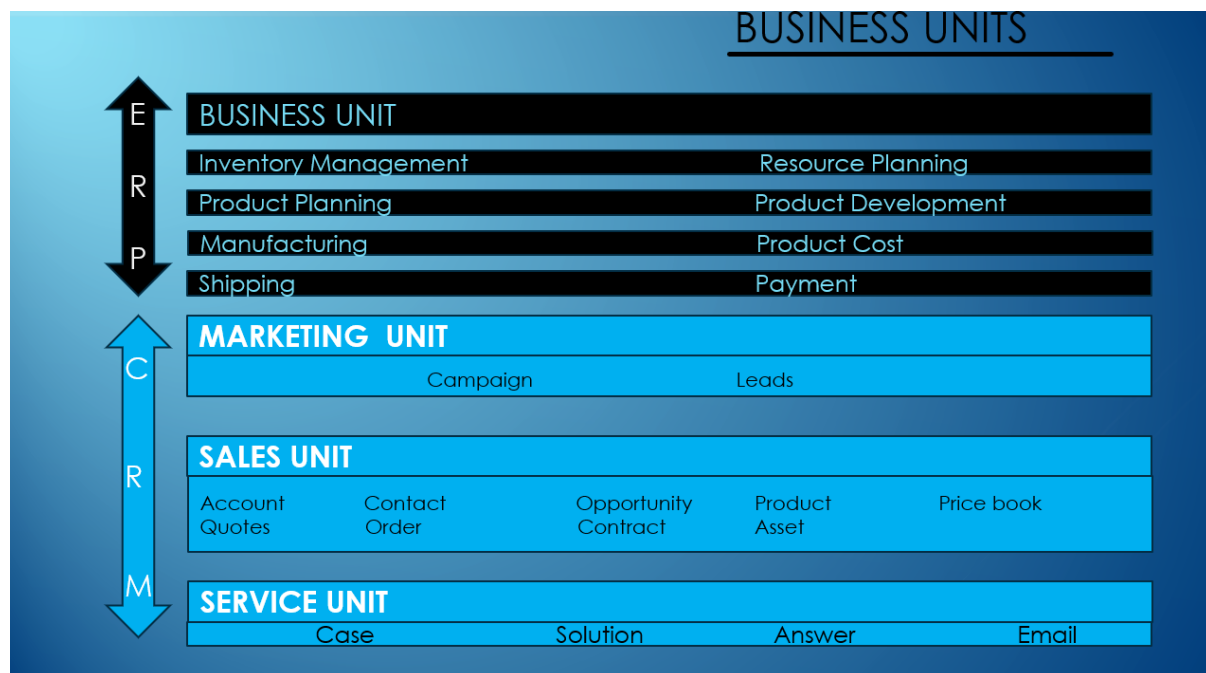
Infrastructure as a service (IaaS) is a form of cloud computing that provides virtualized computing resources over the internet. IaaS is one of the three main categories of cloud computing services, alongside software as a service (SaaS) and platform as a service (PaaS), in simple term where we don't need to install or arrange or depend on any Server or hardware.

PaaS (Platform as a Service) : Where we no need to install any platform/Application at our system to develop applications. like OS, Compiler or editor in SFDC FORCE.COM is platform

SaaS (Software as a Service) : No software required or no need to buy any software here end user he no need to buy any software he can pay as per his usage like pay on demand .everything is in web and you pay what you use

Introduction to Salesforce.com & Force.com

- What is Salesforce.com
- CRM vs ERP
- Difference between Salesforce.com & Force.com
- Different Environment
- Types of Editions
- Enterprise
- Professional
- Unlimited
- Group etc.
- Comparison of Editions
- Salesforce Releases
- Designing your Data Model



Possibilities in SALESFORCE

- 1) PL (programming Language) : APEX
- 2) DB

3) BIG Data: Big data is a collection of data sets. This data comes from data your organization has collected internally such as email addresses, customer loyalty information, purchases, and transaction records as well as social media interactions with your brand.

4) ETL (Extract Transform and Load) :APEX Data Loader / Informatica / SQL Loader / Data Loader / LoadRunner.

5) BI / AI : (Business Intelligence) / Artificial Intelligence : Salesforce Intelligence and Salesforce Einstein .Business intelligence (BI) is a technology-driven process for analyzing data and presenting actionable information to help executives, managers and other corporate end users make informed business decisions. Like we can develop a dashboard using the large data and also we can develop a BOT application like Alexa .Therre are two types of BOT QA BOT which give answer for only specific questions onlybut AI BOT which learn for ever questions like ALEXA

6) Mobile Programming Platform

7) UX: Classic / Lightning

8) IOT Internet of things: Where machines can communicate with each other.

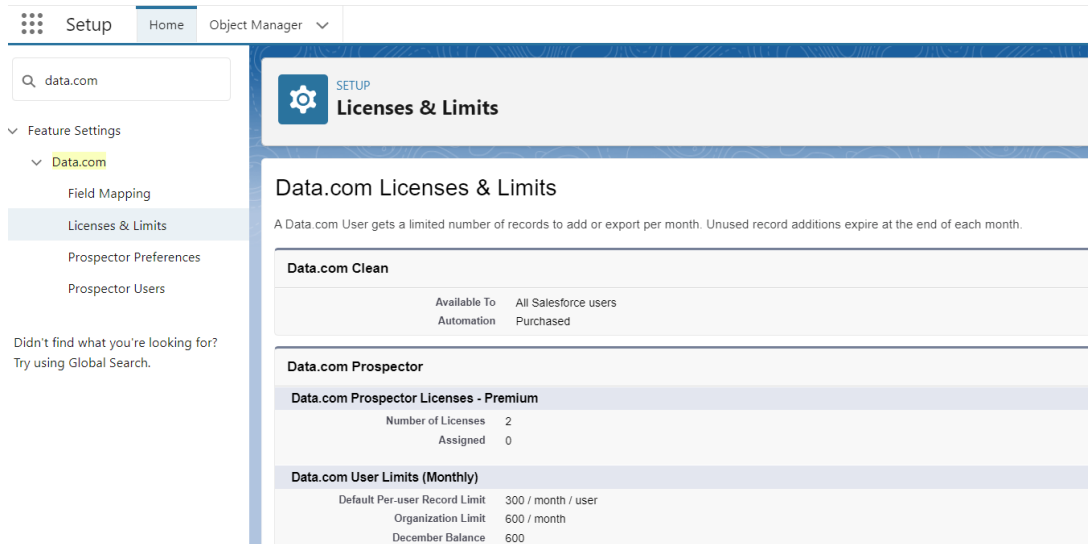
Machine to Machine Communication The Internet of things is the extension of Internet connectivity into physical devices and everyday objects. Embedded with electronics, Internet connectivity, and other forms of hardware, these devices can communicate and interact with others over the Internet, and they can be remotely monitored and controlled.

9) CC: Commerce Cloud

Major Clouds in SALESFORCE

- ✓ Marketing Cloud
- ✓ Sales Cloud
- ✓ Service Cloud
- ✓
 - Force.Com : is a platform (PaaS)
 - Data.Com : where we will get Client information
 - Database.Com : Salesforce Companies Information.

Setup=>Data.com



Setup Home Object Manager

Search: data.com

Feature Settings

- Data.com
 - Field Mapping
 - Licenses & Limits**
 - Prospector Preferences
 - Prospector Users

Didn't find what you're looking for? Try using Global Search.

SETUP Licenses & Limits

Data.com Licenses & Limits

A Data.com User gets a limited number of records to add or export per month. Unused record additions expire at the end of each month.

Data.com Clean	
Available To Automation	All Salesforce users Purchased

Data.com Prospector	
Data.com Prospector Licenses - Premium	
Number of Licenses	2
Assigned	0

Data.com User Limits (Monthly)	
Default Per-user Record Limit	300 / month / user
Organization Limit	600 / month
December Balance	600

Versions of Salesforce

- Spring
- Summer
- Winter

What is current version?

Edition :

- 1) Personal (now not available in market for sale)
- 2) Contact Manager (now not available in market for sale)
- 3) Unlimited
- 4) Group (now not available in market for sale)
- 5) Enterprise
- 6) Professional
- 7) Developer Edition (Free)**

Essentials

Designed for small businesses that want to get started with a CRM system quickly. It includes intuitive walkthroughs and a setup assistant to get started, an easy-to-use UI, and administration tools to customize your deployment as you grow.

Professional

Designed for businesses requiring full-featured CRM functionality. It includes straightforward and easy-to-use customization, integration, and administration tools to facilitate any small to midsize deployment.

Enterprise

Meets the needs of large and complex businesses. It gives you advanced customization and administration tools, in addition to all the functionality available in Professional Edition, that can support large-scale

deployments. Enterprise Edition also includes access to Salesforce APIs, so you can easily integrate with back-office systems.

Unlimited

Maximizes your success and extends it across the entire enterprise through the Lightning Platform. It gives you new levels of platform flexibility for managing and sharing all your information on demand. Includes all Enterprise Edition functionality, Premier Support, full mobile access, unlimited custom apps, increased storage limits, and other features.

Developer

Provides access to the Lightning Platform and APIs. It lets developers extend Salesforce, integrate with other applications, and develop new tools and applications. Developer Edition also provides access to many of the features available in Enterprise Edition. (free edition)

Salesforce Editions That Are No Longer Sold :

Some Salesforce editions are no longer sold. You can continue to use your Contact Manager, Group, Personal, Performance, or Database.com Edition org or purchase one of the editions that are currently sold:

- Professional,
- Enterprise,
- Unlimited,
- Developer Editions.

Environment:

1) Sandbox (Development environment) DEV / SIT / UAT

2) Production ===== Production

Sandbox:

- Configuration Sandbox (only for GUI base where we can configured the thing it is for Admin)
 - Developer Sandbox (Apex)
 - Full copy Sandbox (all features included)
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- ✓ Understanding the Sales Process
 - ✓ Analyzing a real time functional requirement
 - ✓ Converting functional requirement to technical specifications
 - ✓ Building your Data model

SFDC Application in practical

- 1) Creation of Salesforce Account and Login to it
- 2) PROD vs TEST
- 3) Components of Salesforce
- 4) App
- 5) Objects
- 6) Tabs

- 7) Fields
- 8) Different Relationships
- 9) Lookup
- 10) Master-Detail
- 11) Roll-Up Summary
- 12) Many To Many
- 13) Creation of
- 14) Custom Apps
- 15) Console App
- 16) Custom Application
- 17) Custom Object
- 18) Custom Field
- 19) Custom Fields with different field types
- 20) Field Dependencies
- 21) Field History Tracking

Operators, Formulas, Rules and Functions

- ✓ Validation Rules.
- ✓ Date & String Functions.
- ✓ Salesforce List View Setup, Filter.

Setting up User Interface

Home Page Layouts and Home Page Components

Lightning App Builder

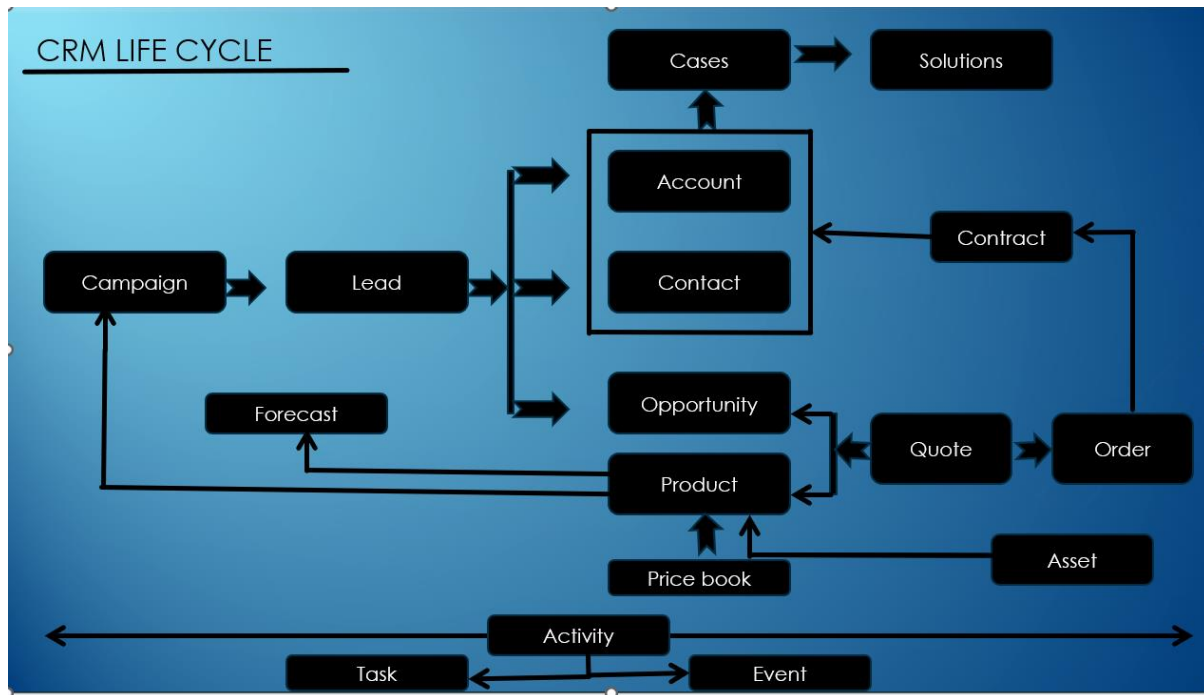
Adding Snapshot to Home Page Layout

Working With Activity

- ✓ New Task
- ✓ Log a Call
- ✓ New Event
- ✓ Email

CRM Overview

- **What is CRM**
- **How CRM can help?**
- **Evolution of CRM**
- **Different Objects in CRM**
- **Campaign**
- **Lead**
- **Account**
- **Opportunity etc..**
- **Overview of CRM Functionality**



CRM in Practical

- Creation of Campaign
- Creation and Conversion of Lead
- Web to Lead
- Web to Case

Service & Support Management

- 1) Cases
- 2) Email to Case
- 3) Web to Mail
- 4) Queues
- 5) Groups
- 6) Assignment Rules
- 7) Escalation Rules
- 8) Auto Response Rules
- 9) Work Flows and its Actions
- 10) Field Update
- 11) Email Alert
- 12) Assign a new task to User
- 13) Outbound Messages
- 14) Approvals Process
- 15) One Level
- 16) Multi-Level
- 17) Audit Trail
- 18) Setting up Search Layouts

Security and Sharing

- Creation of
- 1) Profiles and Permission Set
- 2) Role Hierarchy
- 3) Users
- 4) Delegated Administrator Setup
- 5) Organization Wide Default
- 6) Different Level of Security
- 7) Object – Level Security
- 8) Field – Level Security
- 9) Record – Level Security
- 10) Page – Level Security
- 11) Profile & Role Level Security
- 12) Difference between Profile & Role
- 13) Sharing Rules
- 14) Record Types and Assigning Page Layouts to Record Types
- 15) Single Sign-On
- 16) Public Groups

Data Management Tool / Migration Tools

- Data Loader
 - Insert
 - Update
 - Upsert
 - Export
 - Export All
- DataLoader.io
- Force.com IDE
- Working With Workbench
- Working With Import Wizard

Automation Tools

- 1) Working With Process Builder
- 2) Flow
- 3) Web to Lase
- 4) Web To Leas
- 5) Process Automation
- 6) Workflows

Process Automation

Automation Home (Beta)

Flows

Migrate to Flow

Paused And Failed Flow Interviews

Process Builder

Workflow Actions

Email Alerts

Field Updates

Outbound Messages

Send Actions

Tasks

Workflow Rules

Reports and Dashboards

- Introducing Reports
- Build a Report
- Run and Then Read a Report
- Share a Report
- Report Limits etc.

Working with Different Types of Report

- ✓ Summary Report
- ✓ Tabular Report
- ✓ Joined Report and Matrix Report
- ✓ Introducing Dashboards Component Types
- ✓ Chart
- ✓ Gauge
- ✓ Metric
- ✓ Table
- ✓ Introducing Custom Report Types