

CRM Salesforce for Beginners

Course Curriculum : Your 8 module Learning Plan

<https://www.edureka.co/crm-salesforce>

About Edureka

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About Course

Become an expert in CRM Salesforce by mastering concepts of CRM, its business implications and how Cloud computing is changing the way businesses use technology to engage with their customers.

Curriculum

Introduction to CRM and SFDC

Learning Objectives - In this module, you'll learn the basic overview of CRM, how Cloud Computing is used for CRM and you will also learn about introduction to Salesforce.com.

Topics - CRM Overview, Cloud Computing, Introduction to Salesforce.com (SFDC), SFDC Modules.

SFDC Overview

Learning Objectives - In this module, you will learn creation of business objects and its application, you will also learn about Standard Business Objects and Custom Business objects.

Topics - SFDC Business objects & their application, Standard Business Objects, Custom Business Objects, Salesforce Data Model, Salesforce Relationships.

SFDC Security Model - 1

Learning Objectives - In this module, you will learn about Salesforce Data Fields, Security Features in Salesforce and you will also be learning about the Organization Wide Default settings.

Topics - Salesforce Data Fields, Salesforce Security Features, Organization Wide Default, Profiles, Roles.

SFDC Security Model - 2

Learning Objectives - In this module you will learn about Mass Transfer, Sharing Rules and Application of Roles.

Topics - Records Mass Transfer, Sharing Rules & Application, Application of Roles & Sharing Rules, Profiles & Permission Sets.

SFDC Configuration - 1

Learning Objectives - In this module, you will learn Profiles, Permission Sets, Page Layout, Record Type and Field Level Security .

Topics - Profiles, Permission Sets, Page Layout, Record Type, Field Level Security.

SFDC Configuration - 2

Learning Objectives - In this module, you will learn about how to prepare reports and associated dashboards to enable business performance preview. You will also learn about Marketing Cloud, Sales Cloud and Service Cloud.

Topics - Marketing Cloud, Sales Cloud, Products & Price Book, Quote Management, Service Cloud, Activities, Analytics, Reports, Dashboards, Translation Workbench.

SFDC Advanced Configuration - 1

Learning Objectives - In this module, you will learn about Queue, Assignment Rules, Auto Response, Approval Processes, Workflow, Escalation Rules and Validation Rule.

Topics - Queue, Assignment Rules, Auto Response, Approval Processes, Workflow, Escalation Rules, Validation Rule.

SFDC Advanced Configuration - 2

Learning Objectives - In this module you will learn about Chatter, Content management, Data Loader, Deployment using Change Sets, Apex and Visual Force.

Topics - Chatter, Content management, Data Loader, Deployment using Change Sets, Apex & Visual Force.

Projects

Which Case-Studies will be part of this course.

- (i) Implementing a custom recruitment application on Salesforce.com
- (ii) Defining a sales process automation for a B2B organization involving in selling high value technology tools and services to other organizations e.g. An IT services organization selling infrastructure and application services.

How will I execute the practicals?

Yes, you would be creating Salesforce.com login accounts and will be provided a step by step instructions on how to achieve the CRM concepts on a Salesforce.com system. The course will explain Cloud Computing as a concept and explain the aspects related to SaaS and PaaS.