

# Salesforce Training

Our Salesforce Training program is designed to provide participants with the necessary skills and knowledge to excel in Salesforce administration and development. This hands-on course covers various aspects of the Salesforce platform, including CRM fundamentals, data management, automation, customization, and application development using Apex and Visualforce. By mastering Salesforce, graduates are prepared to pursue diverse roles such as Salesforce administrator, developer, consultant, or architect, and contribute effectively to the success of Salesforce implementations in organisations.

**Course Duration** : 2 Months

**Course Language** : English/Hindi/Telugu

**Classroom** : Offline/Online Training/Hybrid Training

## Description

The Salesforce Training course is a comprehensive program designed to provide individuals with the knowledge and skills needed to effectively utilise Salesforce, the world's leading customer relationship management (CRM) platform. Geared towards sales professionals, marketing specialists, customer service representatives, and system administrators, this course offers practical training in Salesforce's capabilities, features, and best practices.

Throughout the course, participants will explore various aspects of Salesforce, including navigating the Salesforce interface, managing leads and opportunities, tracking customer interactions, and automating business processes using workflows and automation tools. They will learn how to customise Salesforce to meet the unique needs of their organisations, including creating custom fields, objects, and page layouts.

Moreover, the Salesforce Training course covers essential topics such as sales forecasting, campaign management, customer support, and analytics, enabling participants to leverage Salesforce to drive sales growth, enhance customer engagement, and improve operational efficiency.

By the end of the course, participants will be proficient in using Salesforce to manage customer relationships, streamline sales processes, and drive business success. With their newfound expertise in Salesforce, participants will be well-equipped to maximise the value of Salesforce within their organisations and achieve their business objectives.

## Skills you get

- Salesforce Platform Navigation
- Customization and Configuration
- Data Management
- Workflow Automation
- Reports and Dashboards Creation
- User and Access Management

## Course Contents

## **Introduction to Salesforce**

- Overview of Customer Relationship Management (CRM)
- Introduction to Salesforce and its ecosystem
- Understanding Salesforce Editions (Enterprise, Unlimited, Essentials)
- Getting Started with Salesforce Trailhead

### **Exercises:**

- Sign up for a Salesforce Developer Edition
- Navigate Salesforce Setup and User Interface
- Complete basic Trailhead modules

## **Salesforce Fundamentals**

- Objects, Records, and Fields
- Data Types and Relationships (Lookup, Master-Detail)
- Custom and Standard Objects
- Data Import and Export

### **Exercises:**

- Create custom objects and fields
- Establish relationships between objects
- Import sample data into Salesforce

## **Salesforce Administration**

- User Management (Profiles, Roles, Permission Sets)
- Security and Sharing Settings
- Workflow Rules and Process Builder
- Validation Rules and Data Validation

### **Exercises:**

- Set up user profiles and roles
- Configure sharing settings for data visibility
- Create workflow rules and process builder flows

## **Salesforce Customization**

- Page layouts and Record types
- Custom tabs and Home pages
- Custom Apps and Dashboards
- Customising Reports

### **Exercises:**

- Customise page layouts and record types
- Create custom tabs and home pages
- Build custom apps and dashboards
- Customise and run reports

## **Salesforce Automation**

- Apex Triggers and Classes
- Batch Apex and Scheduled Jobs
- Lightning Flow (Visual Workflow)
- Email Templates and Alerts

### **Exercises:**

- Write and deploy Apex triggers and classes
- Schedule batch jobs for data processing
- Create Lightning Flows for automation
- Customise email templates and alerts

## **Salesforce Integration**

- REST and SOAP APIs
- External Data Sources
- Outbound and Inbound Integrations
- AppExchange and Third-party Integrations

## **Exercises:**

- Integrate Salesforce with external systems using REST and SOAP APIs
- Set up external data sources for data synchronisation
- Configure outbound and inbound integrations
- Explore and install apps from AppExchange

## **Salesforce Lightning Experience**

- Introduction to Salesforce Lightning Experience
- Lightning App Builder
- Lightning Components
- Lightning Web Components

## **Exercises:**

- Explore Salesforce Lightning Experience interface
- Build custom apps using Lightning App Builder
- Create Lightning Components and Lightning Web Components

## **Salesforce Advanced Topics**

- Salesforce DX (Developer Experience)
- Salesforce Mobile App Development
- Performance Optimization and Scalability
- Advanced Reporting and Analytics

## **Exercises:**

- Set up Salesforce DX for project development
- Develop and deploy mobile apps using Salesforce Mobile SDK
- Optimise Salesforce performance and scalability
- Explore advanced reporting and analytics features

This course structure provides learners with a solid foundation in Salesforce fundamentals while also covering advanced topics to help them become proficient Salesforce administrators and developers.