



## SALESFORCE (ADMIN & DEV)

From Yes-M Systems LLC

**Length:** TRACK-I (30 hours) & TRACK-II (35 hours)

### **Audience:**

- Anyone who wants to start his/her career as a Salesforce Administrator / Developer / Consultant.
- Anyone working on technologies which are doing not so good in the market like Mainframes, SAP, Siebel, Oracle, Java, Microsoft .Net
- Someone who has experience as Business Analyst.
- Fresh BE, BTech, MS students

Student Location – To students from around the world

**Delivery Method:** Instructor-Led – Live online Training

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Yes-M Systems LLC

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## A. Course Summary

### About this Course:

- Focus on Hands on training.
- 30 hours of Assignments, Live Case Studies.
- Video Recordings of sessions provided.
- One Problem Statement discussed across the whole training program.
- Salesforce Certification Guidance.
- Introduction to SFDC (Sales Force Dot Com).
- Prerequisites sessions conducted for participants not knowing Unix, Java Basics.
- Resume prep, Interview Questions provided.
- Covers All Important SFDC Ecosystem Products.

### AT COURSE COMPLETION

After the completion of this Course, you should be able to:

- Understand What & Why of Salesforce Admin, Salesforce Development, Force.com.
- Ability to design Data Model for cloud based applications and architecture.
- Ability to automate Sales and Service processes using Workflows, Approval Processes, Formulas.
- Hands on experience of end-to-end application designing on Force.com Platform.
- Get guidance on the best practices of Force.com App designing.

### B. Contact us for more details:

*Company name:* Yes-M Systems

*Website:* <http://myyesm.com>,

*Phone numbers (USA):* 678-643-7777, 678-248-0302

*Phone number (India):* 91-8220006968

*Kudzu Reviews:* <http://www.kudzu.com/m/Yes-M-Systems-30363491/reviews/>

*Facebook:* <http://www.facebook.com/yesmsystems>

*Youtube:* <http://www.youtube.com/yesmsystems>

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## C. SALESFORCE (ADMIN & DEV) Course Details

### TRACK I :Objective

#### 1. Identity Confirmation

- 1.1 Activate your computer
- 1.2 Setting Up the User Interface
- 1.3 Set up the UI & search options
- 1.4 Organization Administration
- 1.5 Set your organization's language & locale
- 1.6 Manage currency
- 1.7 Customisation
- 1.8 Create custom profiles & custom fields
- 1.9 Define dependent picklists
- 1.10 Customize lookup fields & formula fields
- 1.11 Customize page layouts
- 1.12 Customize standard related lists
- 1.13 Learn about record types & business processes
- 1.14 Use field-level security
- 1.15 Security & Access
- 1.16 Create & manage your users
- 1.17 Set organization-wide defaults
- 1.18 Learn about record access
- 1.19 Create the role hierarchy
- 1.20 Learn about the sharing model
- 1.21 Manually share records
- 1.22 Set up opportunity team selling & account teams
- 1.23 Learn about folder access
- 1.24 Workflow
- 1.25 Define workflow
- 1.26 Set up workflow rules
- 1.27 Set up workflow tasks & alerts
- 1.28 Workflow Approvals
- 1.29 Plan approvals using workflow
- 1.30 Use the approval wizard – standard vs. jump-start
- 1.31 Create workflow approvals
- 1.32 Data Validation
- 1.33 Learn about Salesforce CRM data validation
- 1.34 Create data validation rules
- 1.35 Learn about custom fields & unique properties Data Utilities
  
- 1.36 Import records using the import wizards
- 1.37 Use mass delete

- 1.38 Use mass transfer
- 1.39 Learn about storage utilization
- 1.40 Analytics
- 1.41 Create custom reports
- 1.42 Use advanced filters
- 1.43 Use conditional highlighting
- 1.44 Use custom summary formulas
- 1.45 Create dashboards
- 1.46 The AppExchange
- 1.47 Learn about the AppExchange
- 1.48 Install an app
- 1.49 Uninstall an app
- 1.50 Marketing Administration
- 1.51 Use the integrated campaign builder
- 1.52 Learn about lead queue & lead assignment setup
- 1.53 Learn Web-to-lead & auto-response rules
- 1.54 Service & Support Administration
- 1.55 Learn about cases & solutions
- 1.56 Set up case escalation rules
- 1.57 Identify solution categories & suggested solutions Salesforce Console
- 1.58 Navigate the Salesforce Console
- 1.59 Create a Salesforce Console
- 1.60 Extending Salesforce CRM
- 1.61 Learn about custom objects
- 1.62 Learn about custom tabs
- 1.63 Learn about custom Web tabs
- 1.64 Build a custom app

## TRACK II :Objective

### 2. Designing Applications on Force.com

- 2.1 Learn about factors to consider when building a data model
- 2.2 Develop custom objects and fields, encrypted fields, field help, and field history tracking
- 2.3 Use master detail, lookup, and many-to-many relationships
- 2.4 Create a user interface for custom applications using the Custom Object tab, Page Layout, and
- 2.5 Customization options
- 2.6 Set field attributes on the page layout
- 2.7 Use the Custom Object queue and event-based workflow rules with field update actions
- 2.8 Develop custom formulas and validation rules
- 2.9 Designing Applications for Multiple Users
  
- 2.10 Learn about factors to consider when designing applications for multiple users
- 2.11 Create profiles, understand what a profile controls (including data access), and customize

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profiles to manage the user experience

- 2.12 Customize the user experience with record types and page layouts
- 2.13 Control access to records
- 2.14 Employ OWD, sharing rules and levels, roles, public groups, and manual share
- 2.15 Apply profiles, OWDs, role hierarchy, and sharing to restrict access to sensitive data
- 2.16 Apply OWDs, public groups, and manual sharing to create conditional access to data
- 2.17 Analyze suitability of FLS, page layouts, and record types to satisfy business requirements
- 2.18 Implementing Business Processes
- 2.19 Use the vlookup, regex, ischanged, isnew, and priorvalue functions to build business processes
- 2.20 Use validation rules to enforce conditional required behaviour
- 2.21 Use functions to enforce data format and data consistency
- 2.22 Implement multistep approval workflows and escalations to automate business processes
- 2.23 Create parallel approval workflows and workflow approvals with dynamic approval routing
- 2.24 Use outbound messages as part of an approval workflow
- 2.25 Establish approval workflow criteria with crossobject formulas
- 2.26 Set up field history tracking to audit processes
- 2.27 Learn techniques to prevent or record data changes

### 3. Managing Data

- 3.1 Learn when and how to use upsert
- 3.2 Use data management tools and the capabilities of API-based tools
- 3.3 Configure the Data Loader via command line
- 3.4 Encrypt passwords using encrypt.bat
- 3.5 Use the Data Loader to create mapping files and to upsert data

### 4. Visualforce Pages

- 4.1 Learn about the capabilities of the Visualforce framework
- 4.2 Incorporate Visualforce pages into Salesforce Construct expression bindings and incorporate
- 4.3 Salesforce into Visualforce pages with Visualforce tags
- 4.4 Use Visualforce tags to create page layouts, input forms, output tables, custom components;
- 4.5 Create partial page refreshes on JavaScript events
- 4.6 Learn about the functionality that comes with Visualforce standard controllers
- 4.7 Find out when Apex is required for creating custom controllers or extensions

Disclaimer: Yes-M Systems and/or their instructors reserve the right to make any changes to the syllabus as deemed necessary to best fulfil the course objectives. Students registered for this course will be made aware of any changes in a timely fashion using reasonable means.

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#### D. About Yes-M Systems:

- a. Established in 2005 (Atlanta, GA, USA), 10<sup>th</sup> year in business.
- b. A+ accreditation from US Better Business Bureau  
(<http://www.bbb.org/atlanta/business-reviews/internet-consultants/yes-m-systems-in-duluth-ga-27431372>)
- c. Received the “Best of 2012” and “Best of 2013” awards from US-based Kudzu  
(<http://www.kudzu.com/m/Yes-M-Systems-30363491/reviews/>)
- d. Trained close to 3000+ students from all over the world.
- e. Experienced, passionate and committed trainers
- f. IT Training in various technologies including Java, Dot Net, SAP, Oracle, QA, BA etc  
(See Courses We offer section for more information)
- g. Professional guidance/help with resumes and interview preparations.
- h. Recruiter help with marketing/jobs
- i. Certification at the end of the training.

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## E. Courses we offer:

### A. QA and BA courses:

- QA [Quality Assurance or QA Testing]
- BA [Business Analysis or Business Analyst]
- QA and BA as a single course (Integrated QA+BA) at a reduced fee.
- Advanced/specialization courses:
  - a. 60-hour Selenium course with Core Java
  - b. ETL Testing
  - c. Advanced Mobile Testing
  - d. Advanced QTP
  - e. Any combination of a, b, c, d.
- Certification QA
  - a. QTP
  - b. ISTQB
  - c. Quality Center
- Healthcare and Finance specialization
  - a. Healthcare as a Domain Class
  - b. Healthcare BA [Business Analyst with specialization in Healthcare]
  - c. Healthcare QA [Business Analyst with specialization in Healthcare]
  - d. Healthcare QA [Quality Assurance or QA Testing]
  - e. Business analyst with Finance specialization.
  - f. Quality Assurance with Finance specialization

### B. Java courses:

- a. Core Java
- b. Advanced Java
- B. Combination of Core Java and Advanced Java

### C. Healthcare and Finance specialization

- a. Healthcare as a Domain Class
- g. Healthcare BA [Business Analyst with specialization in Healthcare]
- h. Healthcare QA [Business Analyst with specialization in Healthcare]



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- i. Healthcare QA [Quality Assurance or QA Testing]
  - j. Business analyst with Finance specialization.
  - k. Quality Assurance with Finance specialization
- D. Microsoft Courses:
- d. Dot Net
  - e. Microsoft Business Intelligence [MS BI]
  - f. Sharepoint
  - g. MS SQL Server
- E. SAP Courses:
- a. SAP FICO
  - b. SAP MM
  - c. SAP HR
  - d. SAP BO
  - e. SAP BI
  - f. SAP HANA
- F. Oracle Courses:
- a. Oracle Financial
  - b. Oracle DBA
  - c. PL/SQL
- G. Other Courses:
- a. Hadoop
  - b. Hadoop with Java
  - c. Salesforce
  - d. Project Management (PMP)
  - e. Maximo
  - f. Tableau
  - g. Informatica
  - h. Cognos