Oscar IT solutions

SALESFORCE.COM TRAINING

POWERED BY HARISHNATH.A



> **CLIENTS**

> **DEVELOPMENT COMPANIES:-**

> **Who fulfils the IT needs of Clients and Developers?**

Like: Operating Systems, Hardware, Programming Languages, Databases etc.

> **Most Visionary : _____**

> _____ of the approach :

1)

2)

3)

> How to get more Clients to use IT?

> *Services in Cloud Computing :*

a)

b)

c)

> Vendors in Cloud Computing :

a)

b)

c)

> COURSE IS ALL ABOUT :

> Why it is # 1 ?

a)

b)

c)

> Without Salesfroce.com Technology :

> UNIFICATION OF 10 TECHNOLOGIES:

> What is Cloud Computing ?

> WHAT IS IAAS?

> What is SaaS ?

> BENEFITS OF CLOUD COMPUTING :

> Low Set up Cost

> Lost Maintenance Cost

> SCALABILITY

> Elasticity

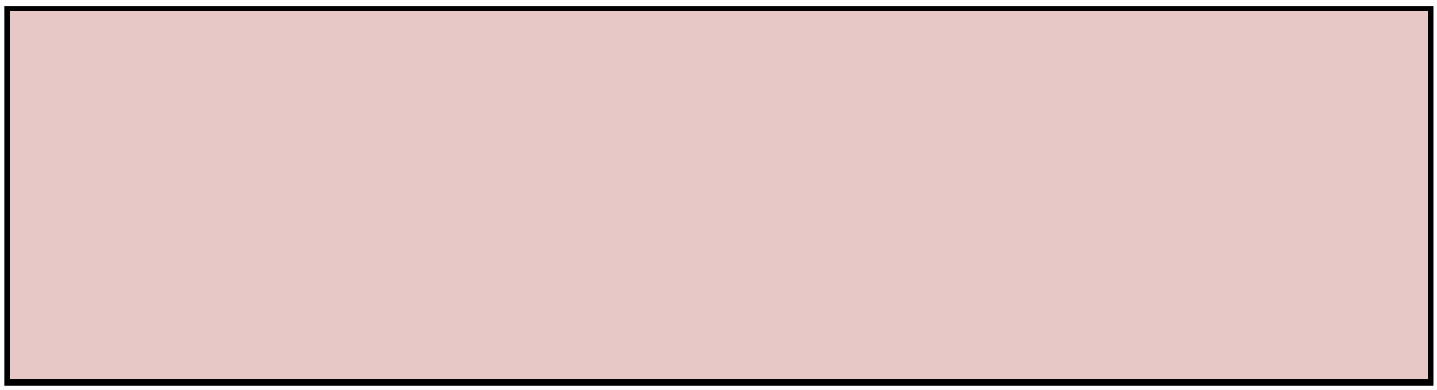
> _____ CLOUDS AND _____ PARTNERS OF SALESFORCE.COM ?

> Why Salesforce.com PaaS #1 ?

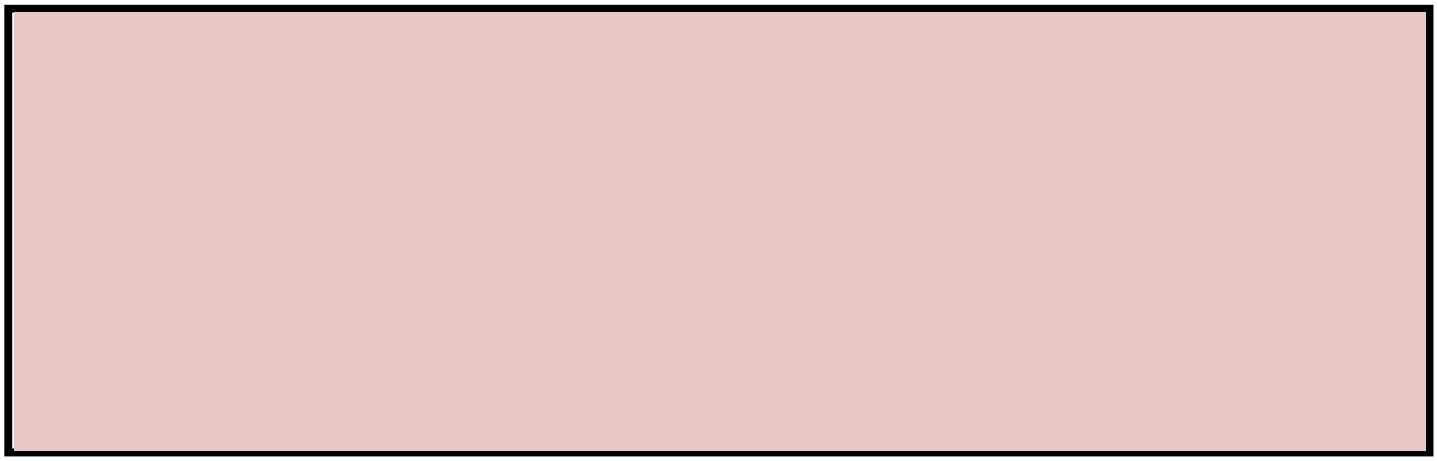
> VERSIONS IN SALESFROCE.COM ?

> Six Clouds and Three Partners ?

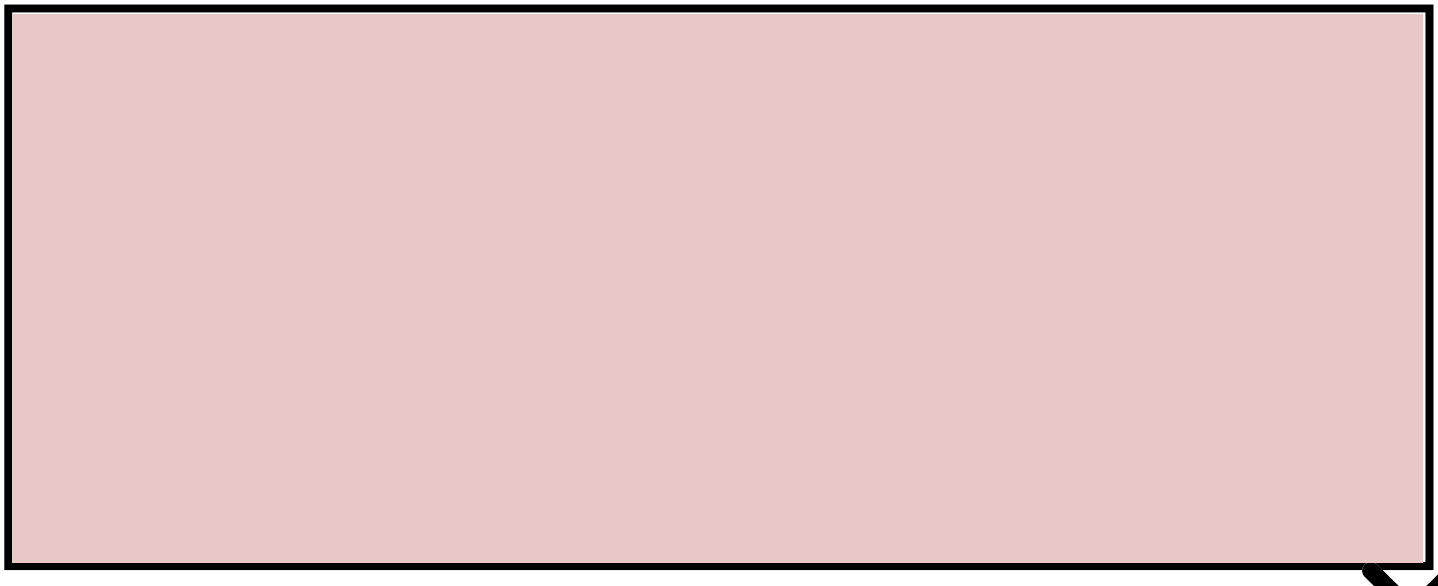
> What is our Course ?



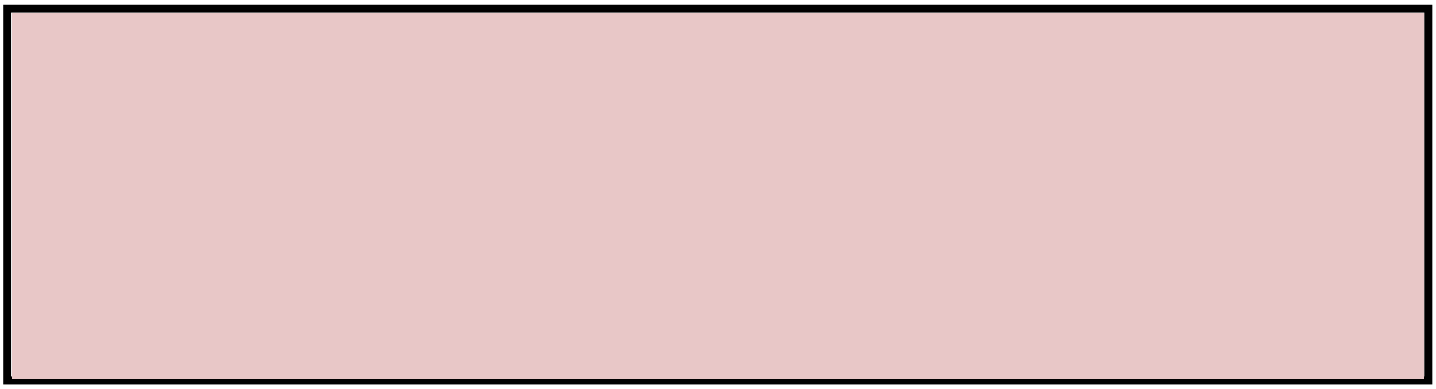
> EDITIONS IN SALESFORCE.COM :



> Environments / Jobs in Salesforce.com :

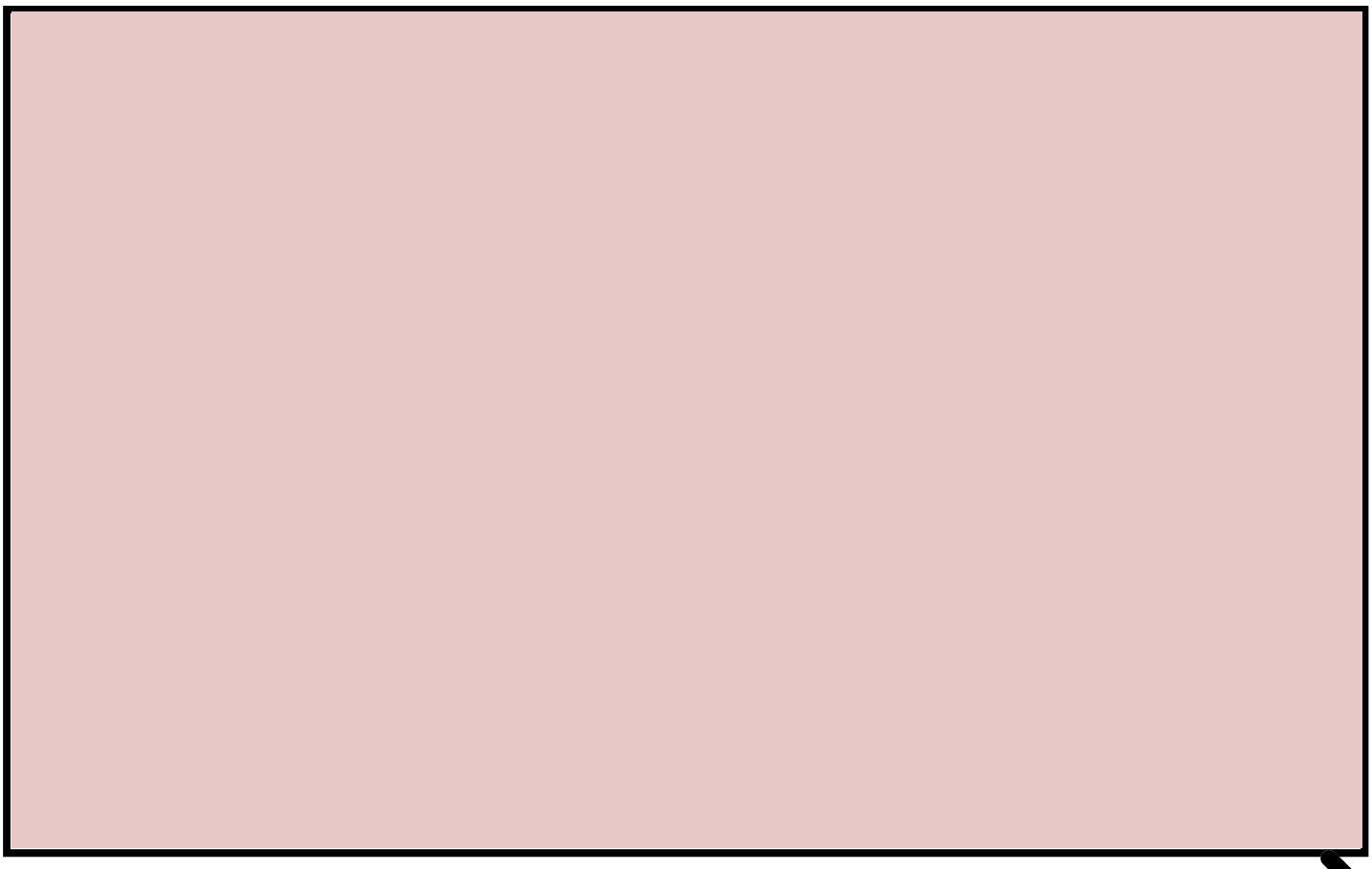


> **Architecture of Cloud Computing :**



> **Entire cloud computing works on _____ Architecture.**

> **Diagram :**



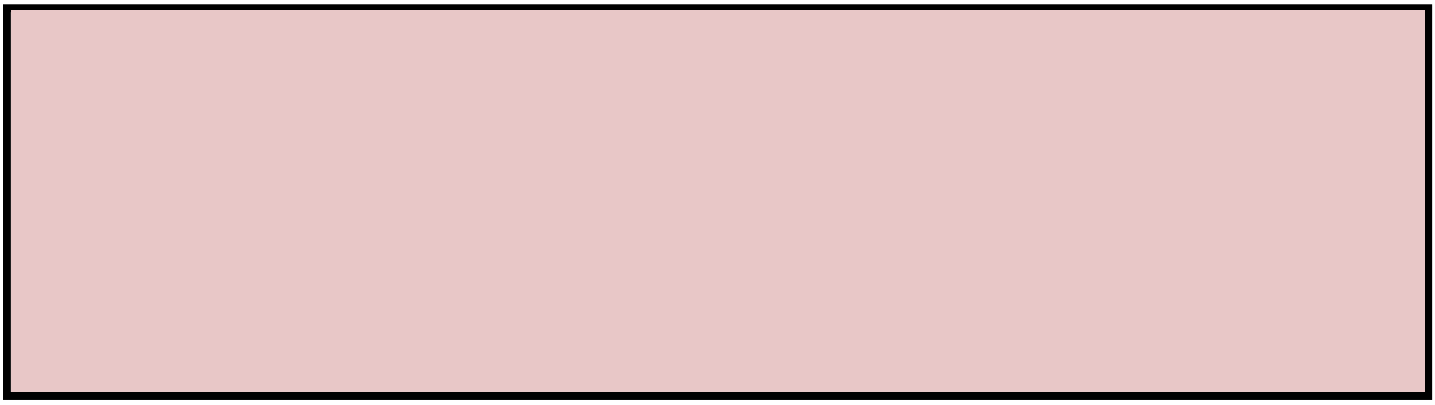
> DEFINITION :

> _____ ARCHITECTURE :

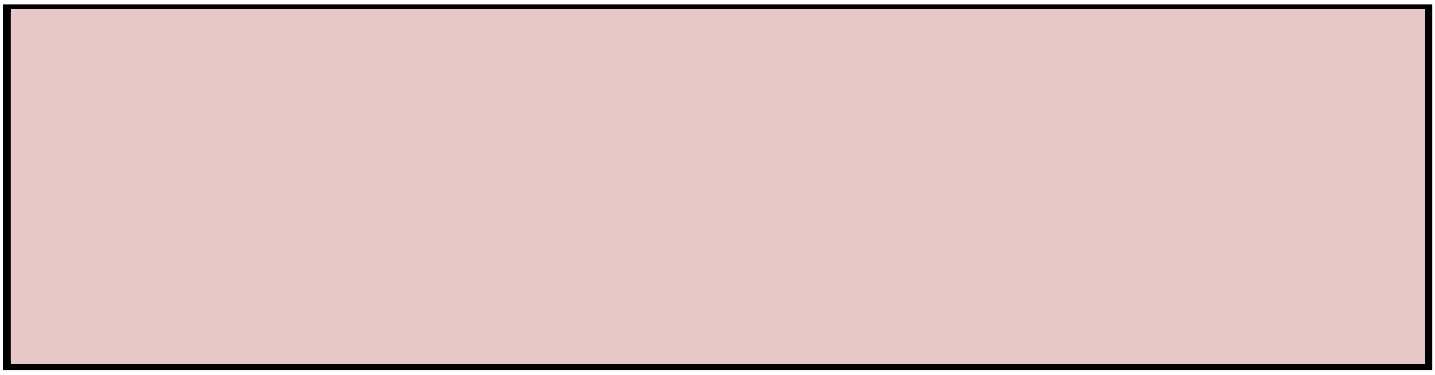
> EXAMPLE :

> SERVICE PATTERN OF SALESFORCE.COM:

> REGISTERING WITH SALESFORCE.COM



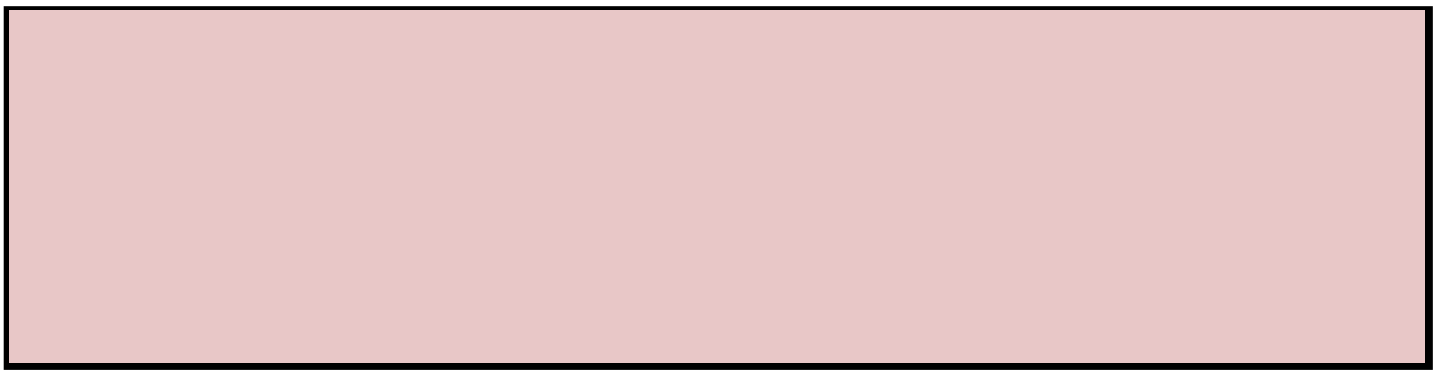
> BASIC VOCABULARY IN SALESFORCE.COM



> FUNCTIONAL DIAGRAM OF SALESFORCE.COM

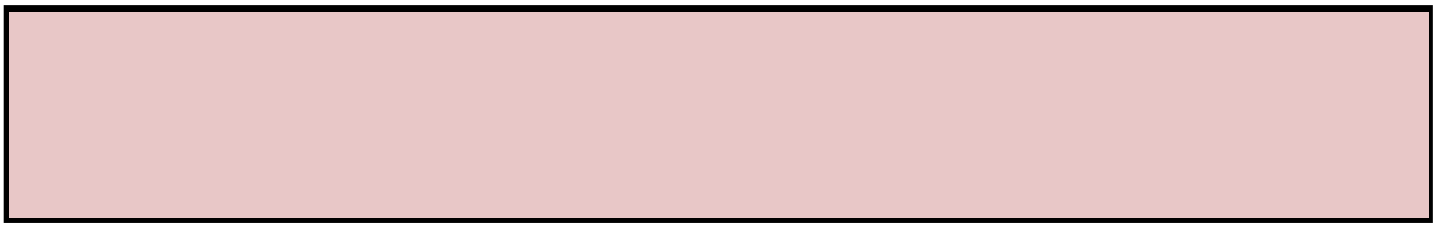


> Basic Navigations :



SESSION'S

> PROFILE :



> Definition :

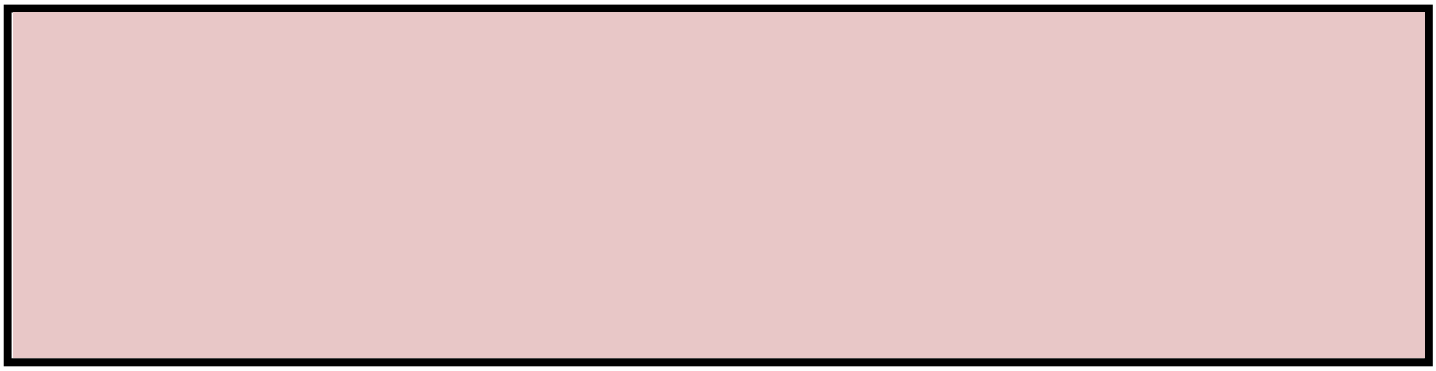


> Our Profile : System Administrator

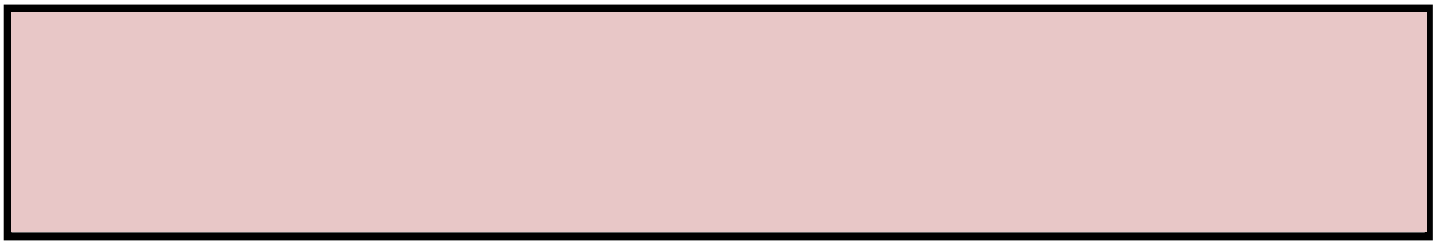


> SaaS& PaaS : Select an App / Tab => SaaS

Tap on Set Up => PaaS



> Create :



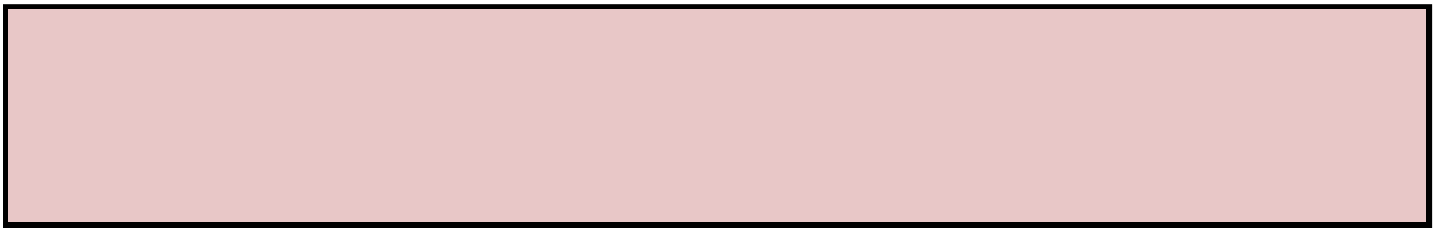
> Apps :



> Definition



> Creation Steps : Click New

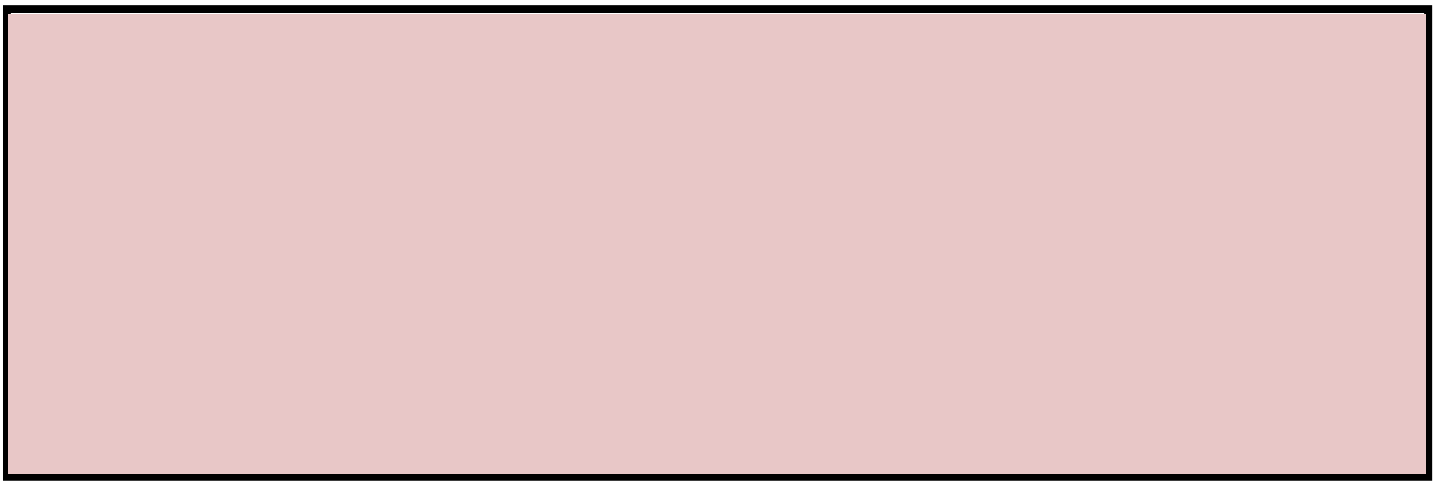


> Step 1 :Custom App => Next

Label : Used for User Visibility & understanding

Name : Internally used by SFDC

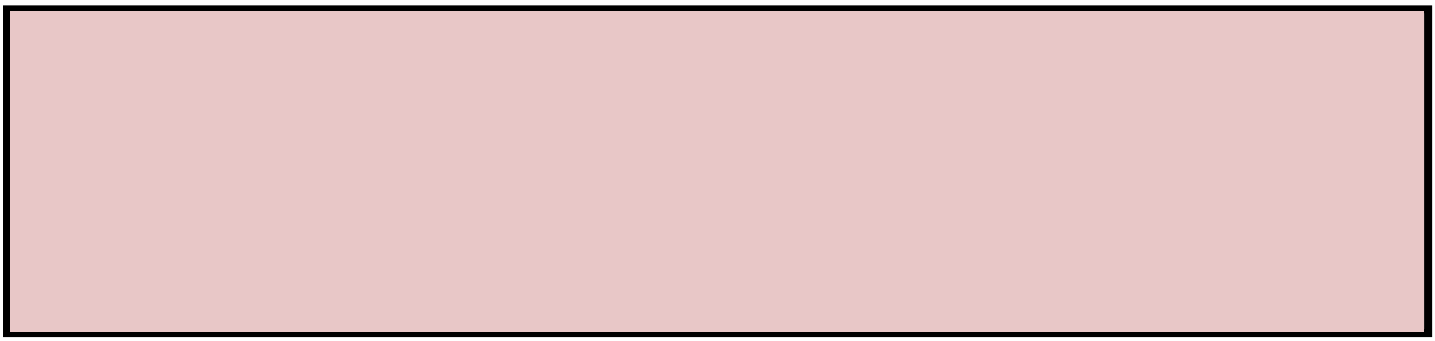
> Step 2 : Mandatory Fields / Optional Fields



> Step 3 :Change Logo / Image



> Step 4 :Home Tabs is must & First



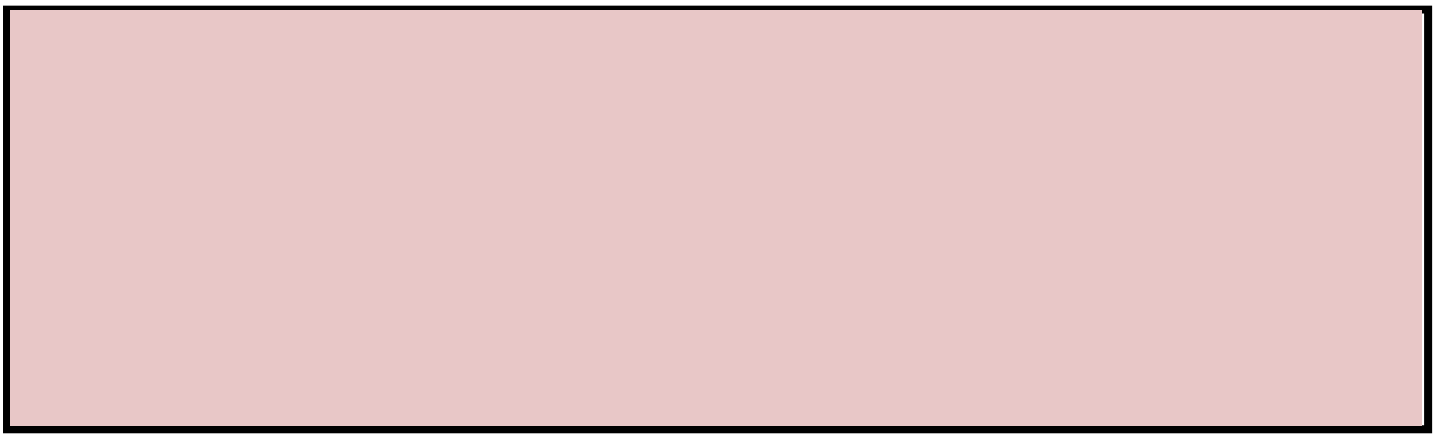
> Step 5 :Assign Profile to Our Application

Click Save

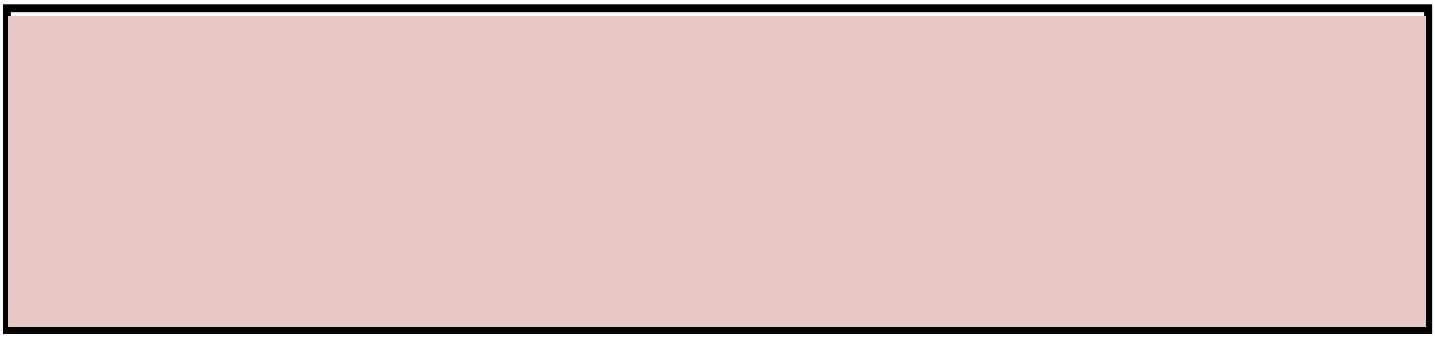
> How to Differentiate Standard & Custom Apps?

Custom App Column check box is checked

Edit Del

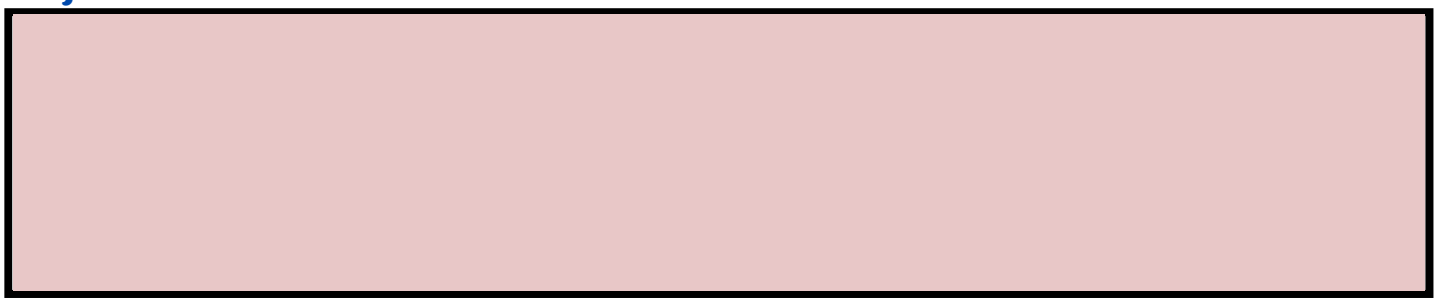


> 2) Tabs :Link to a separate page

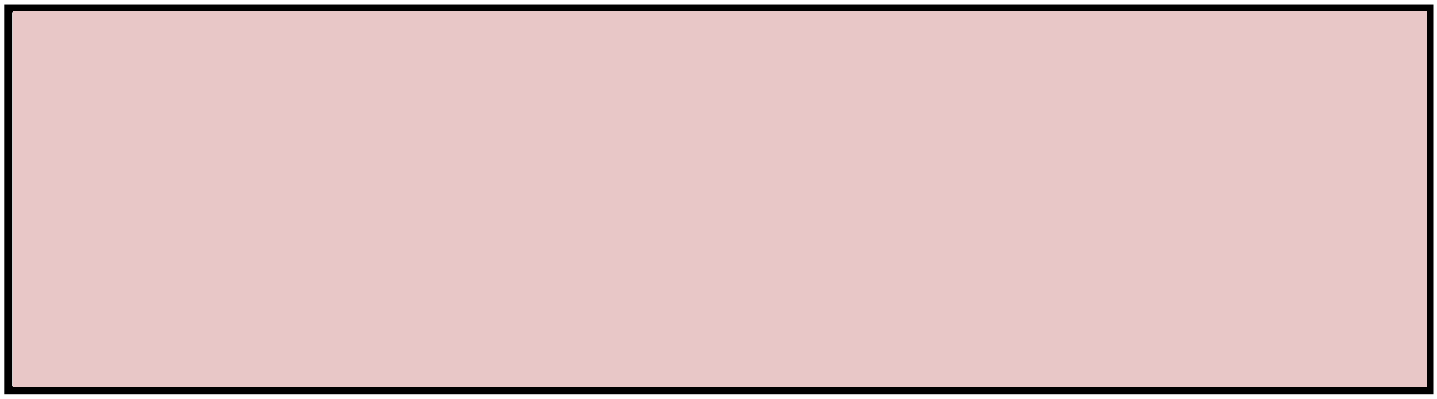


> Dependency: 1 Tab is connected to
1 Sobject / 1 Tab is connected to multiple Apps
Can't Create a Tab until we create Sobject.

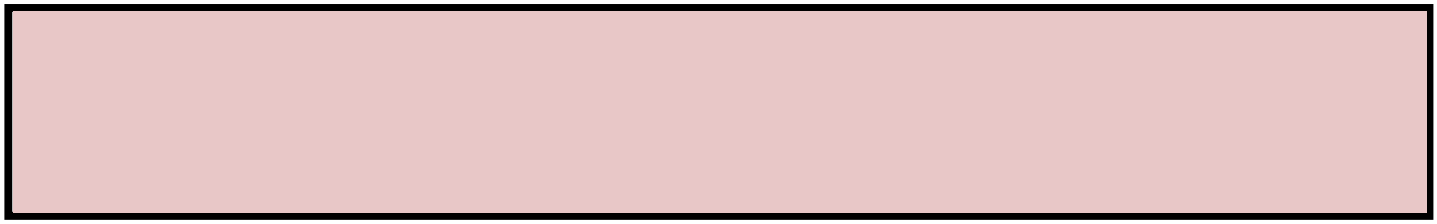
> SObject :



> Definition : Name given to a Storage Space.



> Steps :



> Singular Label :



> Plural Label

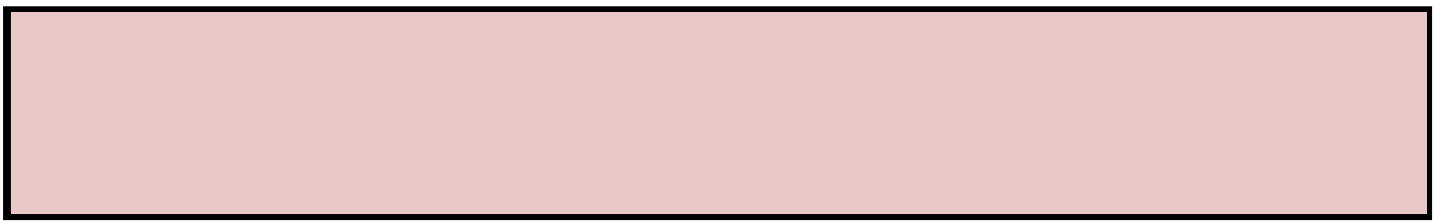
> Object name

> FIELD :NAME

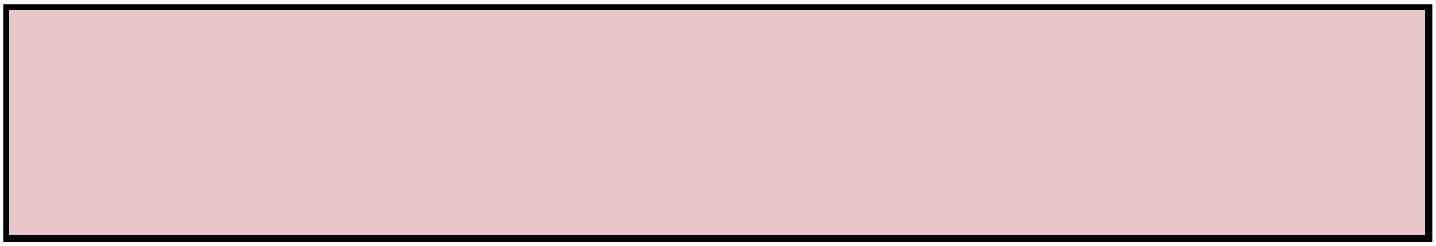
> Type :Text / Auto Number

> ADDITIONAL FEATURES

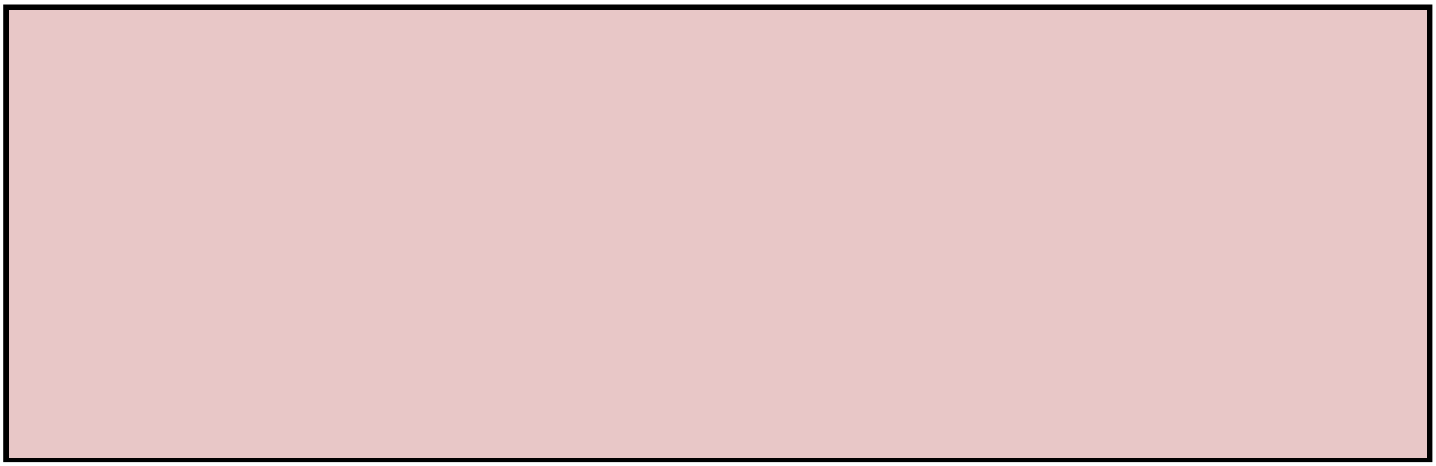
> Development



> Deployed



> SAVE SAVE & NEW CANCEL



> Names of SObject :



> Detailed Page :

> Singular Label :

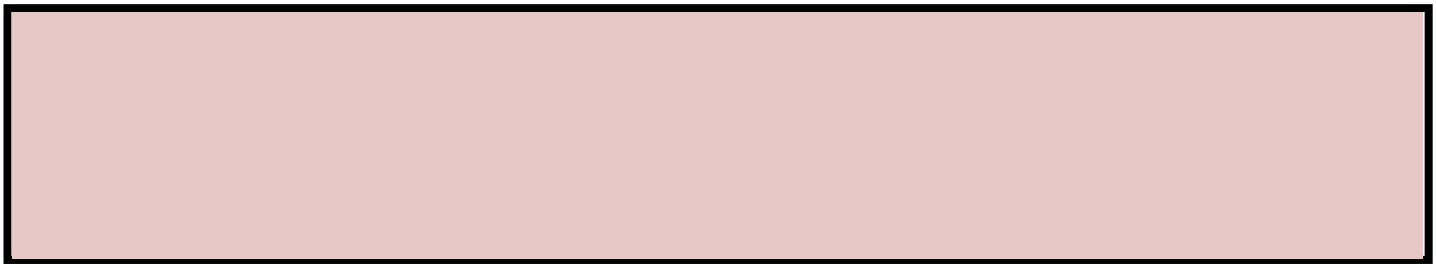
> Plural Label :

> Object Name :

> API Name:

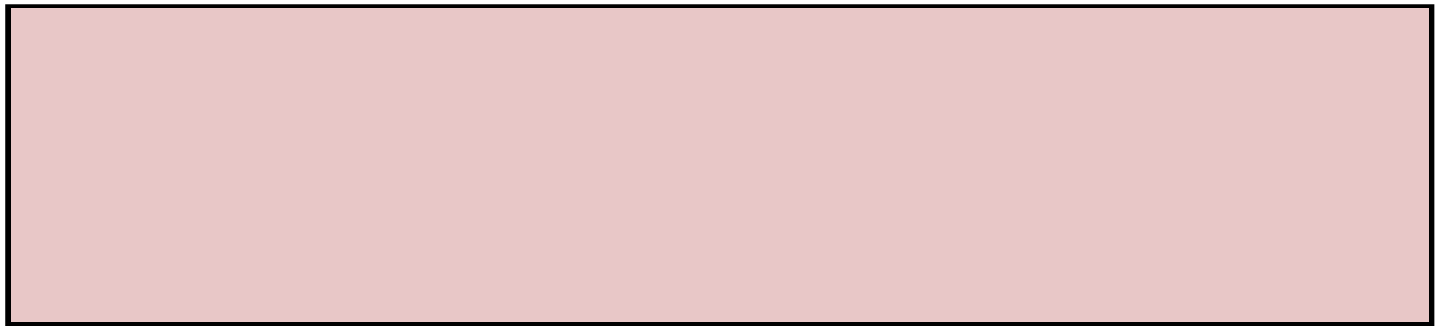
> Create By=>

> Owner =>



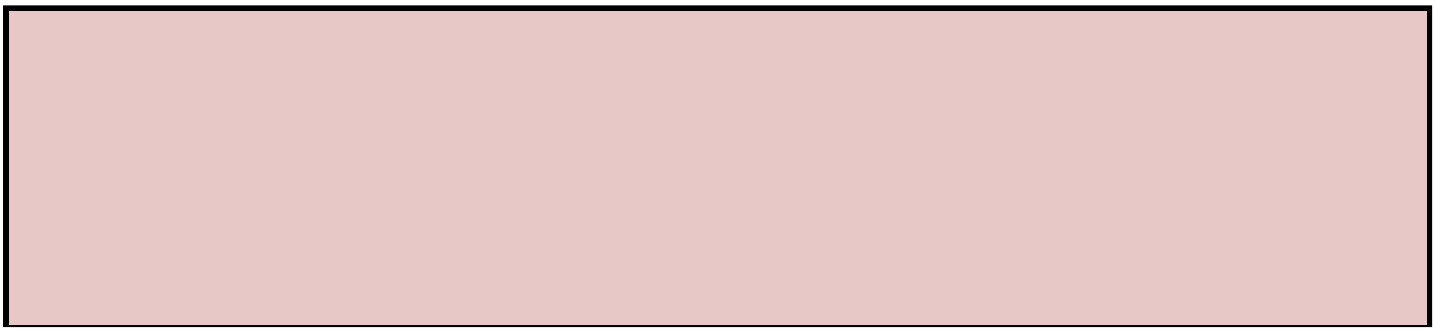
> Step 1 :Selection : Sobject=>

Color / Image => Any color / name



> Step 2 :Add to Profile

System Administrator => Default ON



> Step 3 :

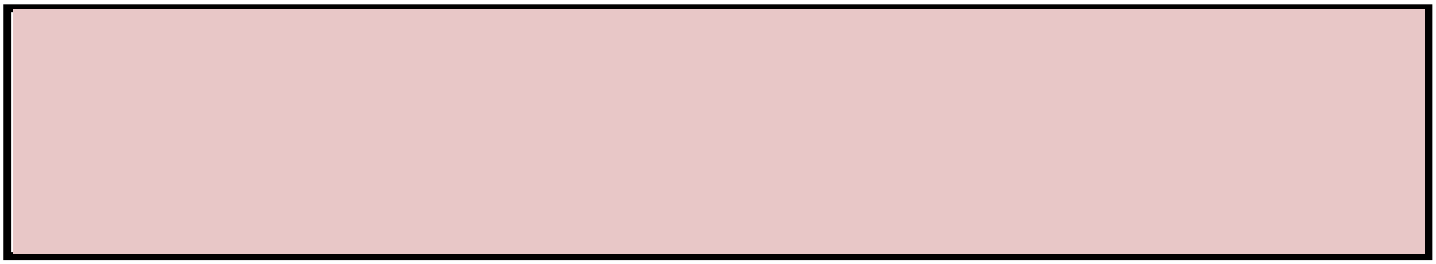
Include in _____ App



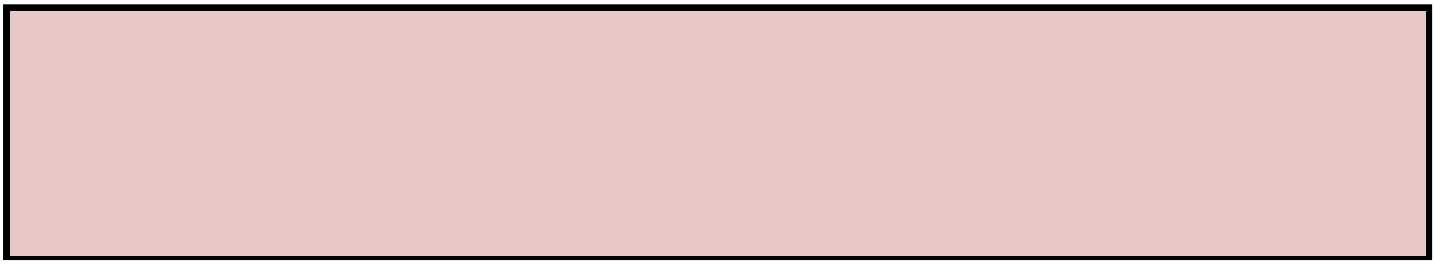
> Step 4 :one Tab can be connected to only One SObject



> Field Creation :



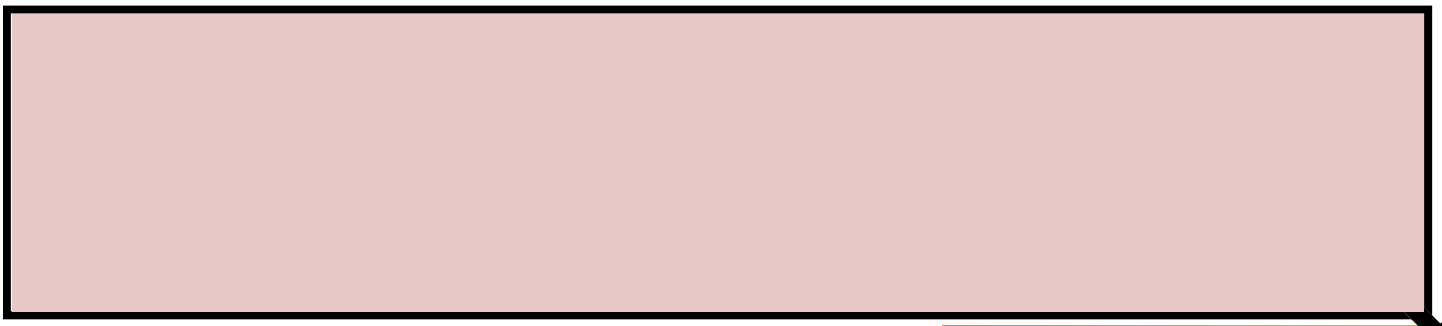
> Step 1 :



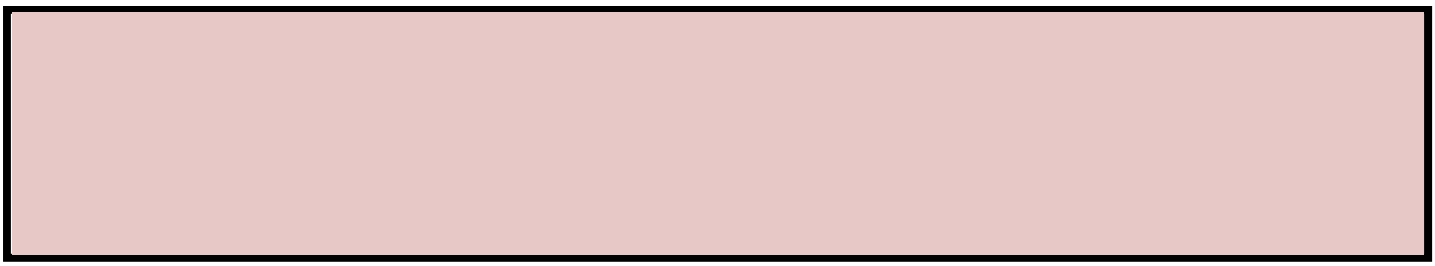
> Data Types :



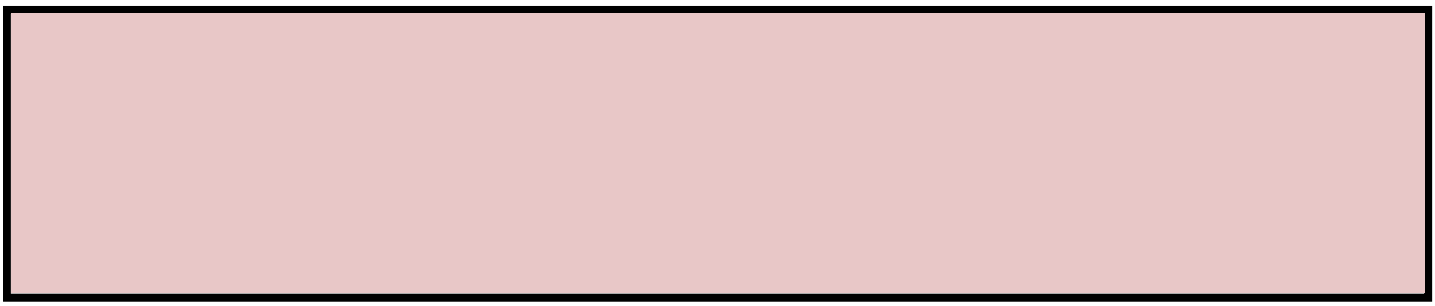
> Categories :



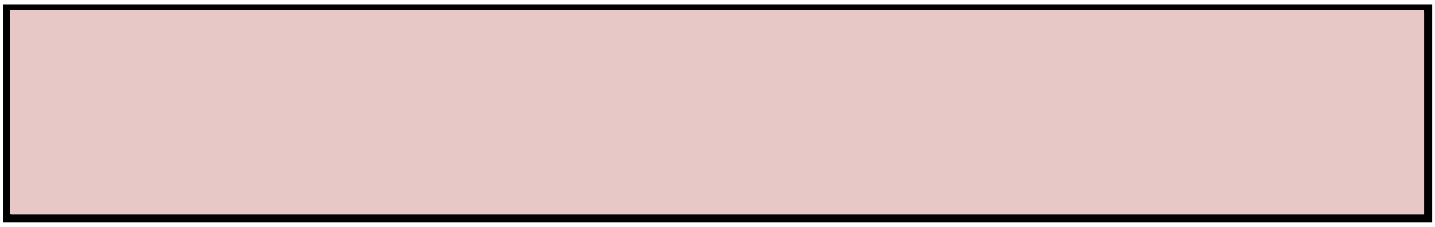
> Step 2 :Name



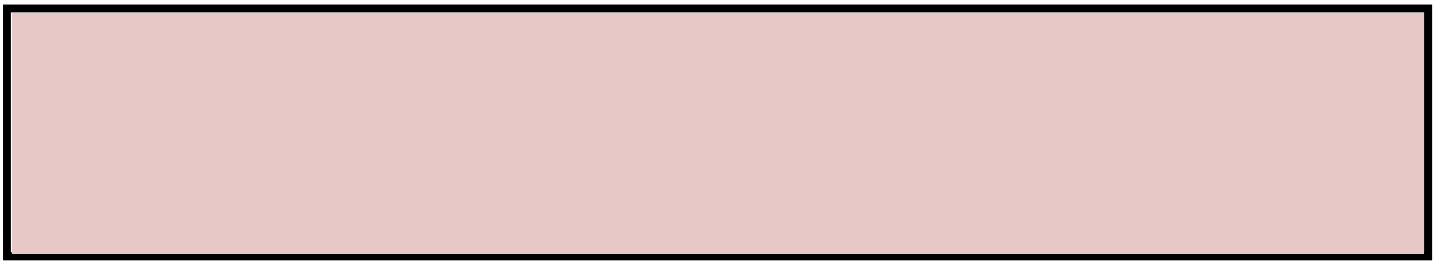
> Step 3 :Assign to Profile



> Step 4 :Save



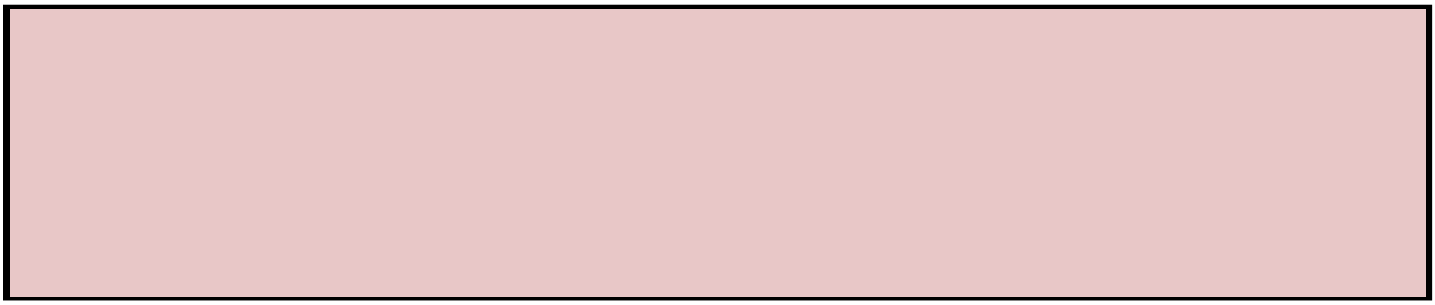
> Entering Data :



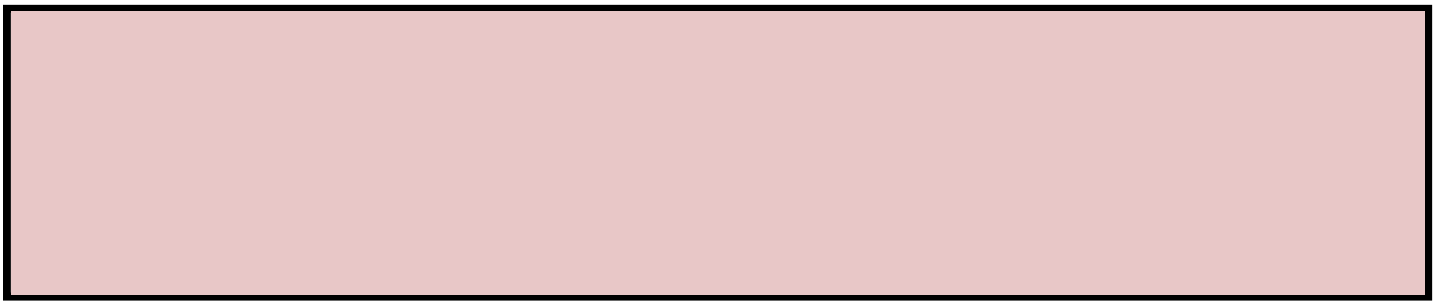
> Navigations => Move to SaaS



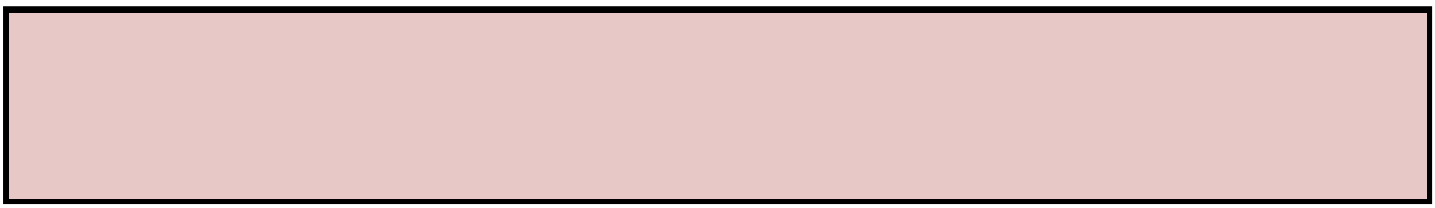
> Creating Records



> Modifying Records :



> DeletingRecords :

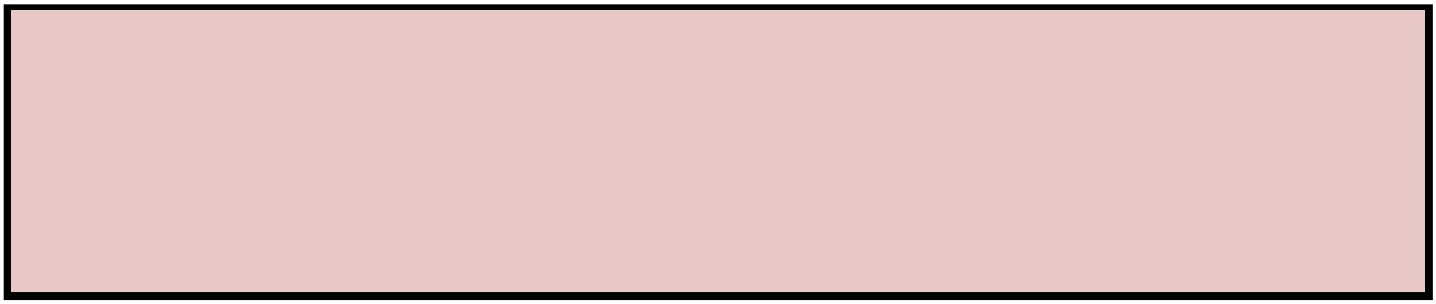


> Undeleting Records :

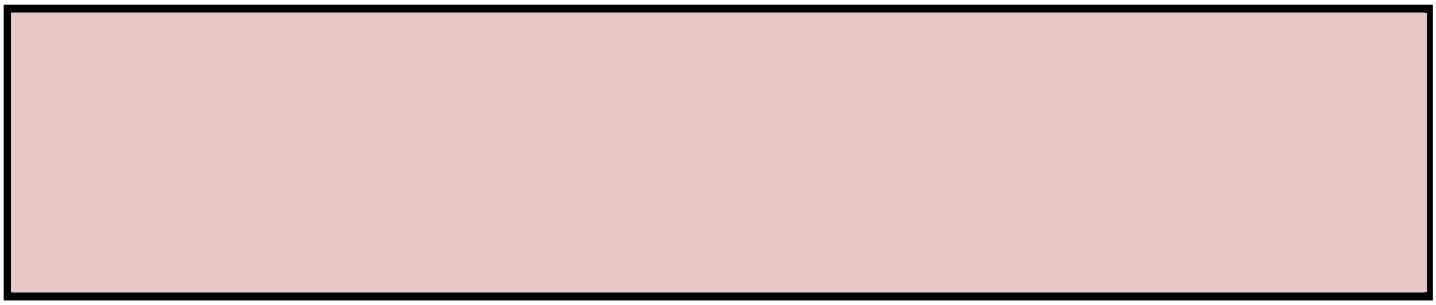


> Assignment:

Identify the Sequence and Inter dependencies between.all the Above components?

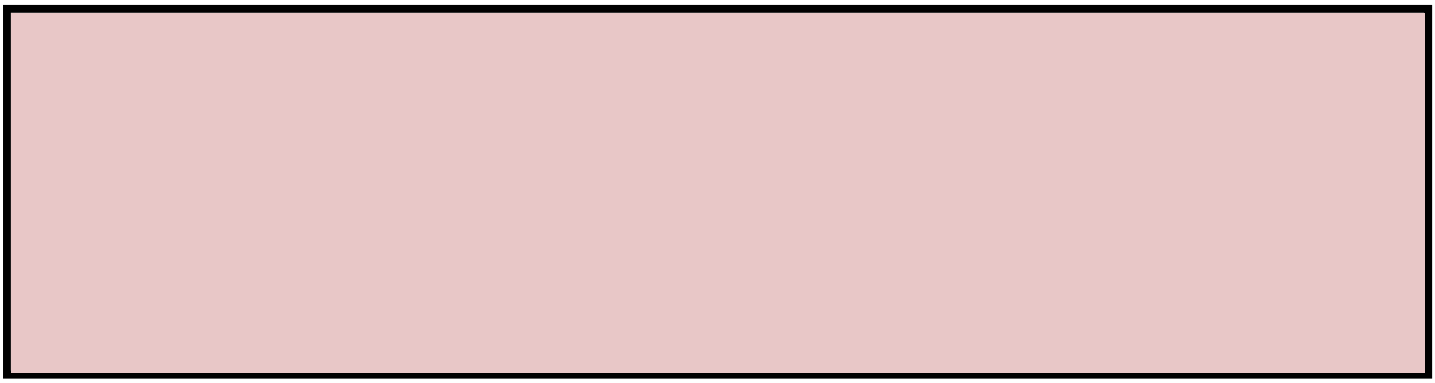


> Possible Sequences and Interdependencies:

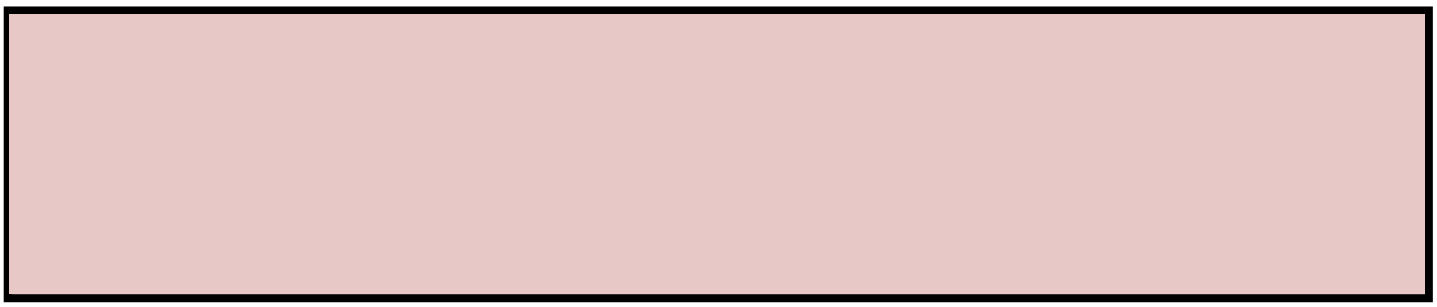


> DESINGING A SALESFORCE PROJECT

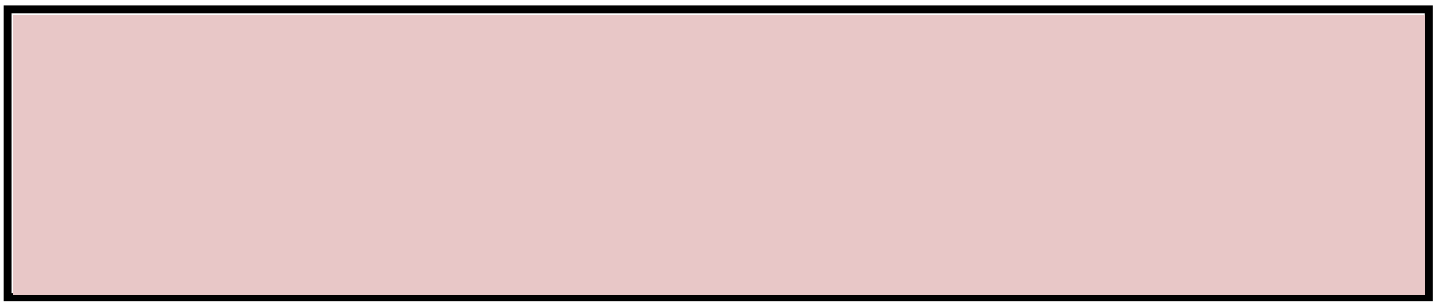
> How to Identify Apps, Sobjects, Tabs and fields?



> Repeat the Approach:



> How to Identify Apps?



> Solution

> Ex1



Ex2



Ex3



Ex4



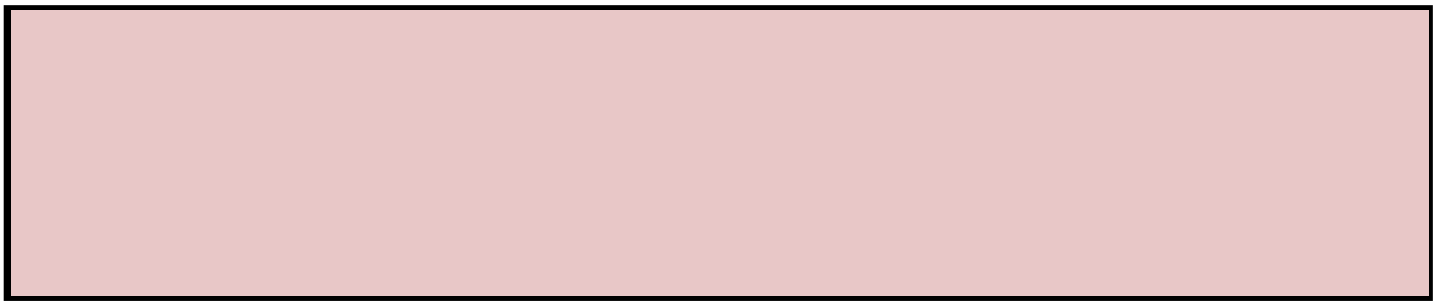
Ex5



Ex6



> How to Choose Sobjects?



> Solution

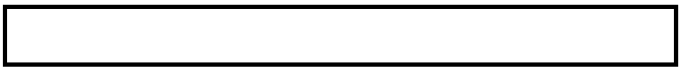
> Ex1 

Ex2 

Ex3 

Ex4 

Ex5 

Ex6 

> How to Choose Fields?



>

Step 1)

Step 2)

Step 3)

Step 4)

> Ex 2)

> Transactions

a)

b)

c)

d)

> Ex 2)

> Transactions

a)

b)

c)

d)

> Ex 3)

> Transactions

a)

b)

c)

d)

> Ex 4)

> Transactions

a)

b)

c)

d)

> Ex 5)

> Transactions

a)

b)

c)

d)

> Ex 6)

> Transactions

a)

b)

c)

d)

> Map Fields with sObjects

> Ex 1) sobject and fields :

> Ex 2) sobject and fields :

> Ex 3) sobject and fields :

> Ex 4) sobject and fields :

> Ex 5) sobject and fields :

> Ex 6) sobject and fields :

> **Assignment :**

Q1 : Complete the Identification process of at least businesses ?

> **Draw back of the above approach:**

> **Ex**

> **How to Overcome the Drawback?**

> **Definition:**

> **Types of**

a)

b)

c)

d)

c)

d)

> 1) _____ Definition :

Ex :



>

2)

3)

a)

b)

c)

> Difference:

> Ex:

> Assignment :

> Select a Business and apply the principles? App Name.

1)

Sobjects :

>

1)

2)

3)

4)

5)

> Transactions:

1)

2)

3)

4)

5)

6)

> Start Creating these Components

> Create App

> Create Sobject

> Create Tab

> Create Fields :

1)

2)

3)

> Create Records by entering data.

> Create _____Relationship.

> Datatype _____

> Result Type _____

a)

b)

> Differences :

> Default is _____

> Preferred is _____

> Apply the relationship through formula :

> Different categories of functions:

> Save the Field

> Enter Data to check the relationship:

> Edit the formula if needed:

> Create another SObject with fields:

> How to Create Look Up Relationship

> Which sObject must be marked as Parent?

> Identify its features :

> After Creating the relationship

> Enter Data to create Record and establish relationship

> Delete the _____ record and check the link in _____ record.

> Undelete and check what happens.

> Assignment :

> Delete Look UP and Start working with Master Detail Relationship between the same sObjects.

> Record the Steps and Observe the Behavior

> Check the records in Recycle Bin

> Again create Mater Detail Relationship

> Delete parent Record and check Child record

> Check Recycle bin, total number of records

_____.

> Undelete and check the count in Parent and Child

> Create another Sobject with Fields

> Create another Master Detail Relationship and Observe the behavior.

> Write navigations if needed

> Apply these features in the selected Projects

> Many to Many Relationship

1)

2)

3)

> Behavior:

> Roll Up Summary:

1)

2)

3)

> Roll up types:

> Navigation:

> Hierarchical Relationship:

> MVC Diagram:

> Understanding the Concepts at Implementation Level

Why / When, How and What

> Why do we need _____ ?

> Why do we need _____ ?

> Why do we need _____ ?

> Why do we need _____ ?

> Step 3 / 15:

> What is a Validation?

> Modes in Validation rules

>

1. _____

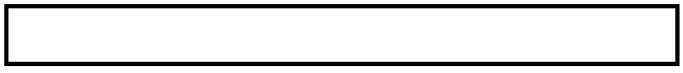
2. _____

> 1. _____ Definition

> Types of _____ Validation

1) 

2) 

3) 

4) 

> Significance of _____

> Significance of _____

> Significance of _____

> Significance of _____

> 2. _____Validation

> Navigation for creating _____ Validation.

> Components used for creating _____ Validation.

>

- _____name
- _____ formula
- _____ Message
- _____Location

> Significance of _____ formula

> Significance of _____ Message

> What is _____ Dependency?

> Navigation for creating _____Dependency

> Significance of _____

> Significance of _____

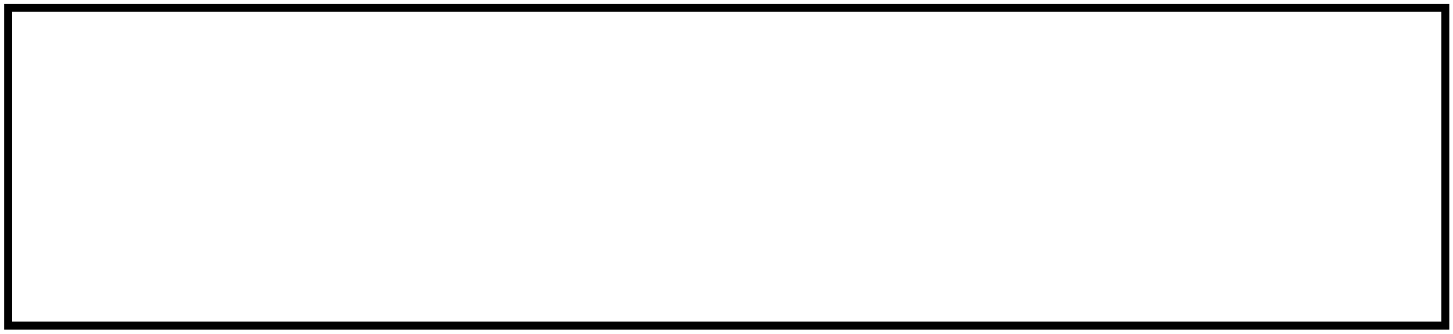
> MVC Pattern

> STEP 4 / 15



> What is a _____ Layout

> Examples:



> Examples:



> In how many ways a field can be marked mandatory/required in salesforce? And what are those ways?

> What are all the properties of a custom field which can be altered from _____ Layout?

> What are the other features of page layout?

> MVC Pattern

> What are Record Types?

> Examples :

> Navigation for creating Record types



> Different Patterns of Navigation to Create

Apps _____

Tabs _____

sObjects _____

Fields _____

Records _____

> Trailhead Badges related to Configuration topics :

CRM

> Industries in the Business world:

> Departments in the Industries:

> CRM Definition:

> CRM as a Domain:

> Salesforce.com CRM:

> Clouds in SFDC CRM:

> Apps in SFDC CRM:

> SObjects in Salesforce.com CRM

> 1. Campaign:

> 2. Lead:

> 3. Account:

> 4. Contact:

> 5. Opportunity:

> 6. Product :

> 7. Price Book :

> 8. Quote:

> 9. Forecast:

> 10. Contract:

> 11. Order :

> 12. Asset:

> 13. Case:

> 14. Solution :

> 15. Activity :

> 16. Task:

> 17. Event:

> 18. Calender :

CASE STUDY

> Mango Inc. an electronic devices manufacturing Company produces

> Mobiles, Air conditioners, Televisions & Smart Watches. To promote their products, they run

>

A) Social Media Marketing at 50,00,000/- per month
B) TV ADS for 85,00,000/- per month
C) New Paper ads for 35,00,000/- per month

> Multiple Companies have responded to their ads,

- Indian Railways to buy 1500 Televisions.

> MGopichand Academy to buy 300 Televisions and 500 Smart watches.

- Chutney's Restaurant to buy 250 Air conditioners.
- Apollo hospitals to buy 600 Air conditioners, 750 smart watches and 250 Televisions.
- Aparna Construction company 600 mobiles for their marketing Representatives.

CASE STUDY

- The Technology Head of Indian Railways Mr. Pratap Singh has to take the decision considering the prices.
- The Technology Partner of Gopichand Academy Ms. Anupama is discussion with the Sales team.
- The Chutney operation head Mr. Anthony is working on the power consumption of Air conditioners.
- The Apollo Hospitals South Indian head Mr. Imran Ahmed is convinced with the Products
- The Electrical Engineer Mr. Arif Shaik has approved the order for mobiles at Aparna constructions.

> The prices are as follows:

- Mobiles 75,000/-
- Air Conditioners 40,000/-
- Televisions 95,000/-
- Smart watches 20,000/-

> CRM Implementation in SFDC :

- Step 1) Create Campaigns as per the data available in the case study.

- Step 2) Record the leads from the case study and map them to respective Campaigns.

- Step 3) Filter the Leads to remove duplicates.

- Step 4) Convert the Lead into Account / Contact / Opportunity.

- Step 5) Check for the 3 records in respective Sobjects, Check Campaign and notice difference.

Look for the lead record in Lead Sobject and notice the difference.

- Step 6) Work on the opportunity to access the revenue by entering random values into the amount and adjusting the probability. See the difference in Campaign Sobject. Edit the various stages of opportunity from opened to closed win , closed lost. And see the difference in Campaign record second column.

- Step 7) Create Products with Standard Prices.
- Step 8) Create Price Books with various offers and prices.
- Step 9) From the Opportunity record map the Price Book and Products by entering Quantity.
- Step 10) This reflects the Amount field in Opportunity Record and also the Revenue in Campaign.
- Step 11) Generate Quotation in PDF and email it to the Contact.
- Step 12) Work on Forecasting.
- Step 13) Create a Case and search for a Solution.
- Step 14) Booking Appointments with Calendar and Assigning Tasks and Events.
- Repeat the steps with multiple Case Studies.

> Working With PaaS :

> Assignment Rule :

> Web to Lead :

> Auto Response :

> Escalation Rules:

> Email to Case:

Administration STEP 12 to Step 15

- **Data Migration :**

- **Security :**

- **Automation :**

- **Approval :**

- **Busines intelligence :**