

Since 2007, Making IT Experts & Products

## Course: Salesforce Training

Duration: Hrs (Changeable) | Fees: Individual / Batch

Since 2007, Nestsoft TechnoMaster has been providing training, internships, and services in IT technologies, both online and offline, with the expertise of **over 250 industry experts**. We have delivered internships, training, and seminars to more than 50,000 students, resulting in numerous success stories. **We offer 100% placement support through JobsNEAR.in**

### Our Courses/Internship

- Python/Django Fullstack
- Artificial Intelligence
- Machine Learning
- Data Science
- Software Testing (All)
- Wordpress, Woocommerce
- Digital Marketing, SEO
- Php/MySQL, Laravel
- Flutter, Android, IOS
- Asp.net MVC
- Web Design, Javascript
- Angular JS, React JS
- CCNA, MCSA, CCNP
- AWS, GCP, Azure
- Odoo, Salesforce, Sap
- Microsoft Excel
- Ethical Hacking



Syllabus on the Next Page ..



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## 1. Introduction to Salesforce CRM

- \* Overview of CRM and its importance in businesses
- \* Introduction to Salesforce ecosystem
- \* Sales CloudService Cloud
- \* Marketing Cloud
- \* Commerce Cloud
- \* Editions and Licensing in Salesforce
- \* Key Terminologies in Salesforce

## 2. Salesforce Basics and Navigation


- \* Understanding the Salesforce user interface (UI)
- \* Salesforce Apps and AppExchange
- \* Tabs, Objects, Records, and Fields
- \* Setup and Configuration: Basics
- \* Creating and managing list views

## 3. Salesforce Data Model and Management

- \* Data Models: Standard vs. Custom Objects
- \* Fields: Standard and Custom Fields
- \* Relationships in Salesforce:
  - \* Master-Detail Relationship
  - \* Lookup Relationship
  - \* Many-to-Many Relationship
- \* Data Import and ExportData Loader
- \* Import WizardData Validation and Rules

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- \* Validation Rules Required Fields

## 4. Salesforce Security and Access

- \* User Management Creating and managing users
- \* Profiles and Permission Sets
- \* Role Hierarchies Organization-Wide Defaults (OWD)
- \* Sharing Rules and Manual Sharing Field-Level Security
- \* Login IP Ranges and Session Settings

## 5. Business Process Automation

- \* Workflow Rules Process Builder
- \* Approval Processes Email Alerts and Templates
- \* Escalation and Assignment Rules

## 6. Salesforce Lightning Experience


- \* Overview of Salesforce Lightning
- \* Transition from Classic to Lightning
- \* Lightning App Builder Creating and customizing pages
- \* Components and utilities
- \* Lightning Flow (Flow Builder) Types of Flows
- \* Flow vs. Process Builder

## 7. Reports and Dashboards

- \* Creating and customizing Reports
- \* Tabular, Summary, Matrix, and Joined Reports
- \* Report Filters and Formulas Dashboards:

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- \* Dashboard Components Dynamic Dashboards

- \* Scheduling and Exporting Reports

## 8. Sales and Service Cloud

- \* Sales Cloud: Lead Management

- \* Lead Conversion Process

- \* Opportunity Management

- \* Stages, Forecasting, and Pipeline

- \* Products, Price Books, and Quotes

- \* Service Cloud: Case Management

- \* Creating and resolving cases Case Assignment Rules

- \* Knowledge Base Management Entitlements and Milestones

- \* Service Console

## 9. Integration and AppExchange

- \* Introduction to Salesforce Integrations

- \* REST and SOAP APIs

- \* Integration with third-party tools

- \* (e.g., Outlook, Gmail, Slack)

- \* Introduction to AppExchange

- \* Installing and managing apps


- \* Popular AppExchange tools


## 10. Salesforce Development Basics

- \* Overview of Salesforce Development

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- \* Introduction to Apex Apex Triggers
- \* Apex Classes Visualforce Basics
- \* Introduction to Lightning Web Components (LWCs)

## 11. Salesforce Deployment and Sandbox Management

- \* Types of Sandboxes Change Sets
- \* Deployment Best Practices
- \* Version Control with Git and other tools

## 12. Industry-Specific Use Cases

- \* Salesforce for Retail Salesforce for Healthcare
- \* Salesforce for Financial Services

## 13. Certification Guidance

- \* Overview of Salesforce Certifications
- \* Salesforce Administrator
- \* Salesforce Platform App Builder
- \* Salesforce Developer
- \* Salesforce Architect
- \* Exam Tips and Preparation

## 14. Advanced Topics (Optional)

- \* Salesforce Einstein (AI features)
- \* Salesforce Marketing Cloud Overview
- \* Advanced Security (Shield)
- \* Advanced Analytics (Tableau CRM)

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- \* This syllabus can be tailored to different levels
- \* (beginner, intermediate,
- \* advanced) and focuses depending on the role
- \* (Administrator, Developer, Consultant).
- \* Let me know if you'd like to refine it further for a specific audience or purpose.

(Click on Course for more details)

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**- Thank You -**

**N.B: This syllabus is not final and can be customized as per requirements / updates.**

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