

**Salesforce and Salesforce Platform for Technology Leaders**

**Course Number:** SF-112
**Duration:** 3 days

**Overview**

This Salesforce® and Salesforce Platform (formerly known as Force.com®) for Technology Leaders training course introduces executives to the wide range of features and capabilities of the Salesforce and Salesforce Platform.

**Prerequisites**

No prior experience is presumed.

**Materials**

All Salesforce and Force.com training students will receive comprehensive courseware.

**Software Needed on Each Student PC**

Salesforce is web-based and attendees only need an Internet connection and modern web browser for training. Salesforce recommends Chrome.

**Objectives**

* The Salesforce Platform architecture and the Salesforce object model
* Basic user and license administration
* Security in Salesforce
* Configuration in Salesforce
* Automation in Salesforce, including the use of Workflow Rules, Approval Processes, and the Process Builder
* Custom applications on the Salesforce Platform using the declarative interface
* When to use Apex, Visualforce and Lightning Components
* Managing and importing data
* Analytic tools including Lightning Reports, Lightning Dashboards, and list views

**Outline**

* Agenda & Course Overview
* Salesforce.com Overview
	+ Major Clouds
	+ Platform Overview
	+ General User Interface
	+ Lightning Experience vs Salesforce Classic
	+ Object Model
	+ Search
	+ Force.com Architecture
	+ Model, View, Controller
	+ Apex, Visual Force
	+ Lightning Components
	+ Uses of the Platform
* Software Development Lifecycle
* Project Management Strategies
* Licensing
* Organization Settings
	+ Locale, Language, Time Zone
	+ Fiscal Year
	+ Multi-Currency / Advanced Multi-Currency
* System Security
	+ Users
	+ Network Security / Activation
	+ Login History
	+ Profiles
	+ Permission Sets
	+ Delegated Administration
* Record Security
	+ Record Ownership / Full Access
	+ Organization-Wide Defaults
	+ Role Hierarchy & Roles
	+ Sharing Rules
	+ Manual Sharing
	+ Account Teams
	+ Opportunity Teams
	+ Queues
	+ Case Teams
	+ Apex Sharing
	+ Territory Management
* Customization
	+ Custom Fields
	+ Picklists
	+ Controlling & Dependent Picklists
	+ Formula Fields
* Field Level Security
* Customization
	+ Page Layouts
	+ Record Types
* Sales Cloud
	+ Opportunities
	+ Products & Price Books
	+ Product Schedules
	+ Quotes
* Sales Productivity Tools
* Field History
* Service Cloud
	+ Cases
	+ Solutions
	+ Knowledge
	+ Case Assignment Rules
	+ Case Auto-Response Rules
	+ Email to Case
	+ Web to Case
	+ Live Agent
	+ Escalation Rules
	+ Entitlements
	+ Service Contracts
	+ ITIL
* Ideas
* Salesforce Questions
* Chatter
* Object Relationships
* Lookup & Master Detail Fields
* Rollup Summary Fields
* Lookup Field Filters
* Custom Objects
* Custom Tabs
* Custom Apps
* Setup Audit Trail
* Home Page Configuration
* Automation
* Debugging
* Data Validation
* Workflow
	+ Workflow Actions
	+ Email Templates
	+ Time Based Workflow
* Approval Processes
* Process Builder
* Lightning Flow
* Salesforce Record Id’s
* Data Loader
* Mass Transfer
* External Id’s
* Mass Delete
* Weekly Data Export
* Data Migration Best Practices
* Marketing Cloud
	+ Marketing Relationships
	+ Leads
	+ Lead Conversion
	+ Web to Lead
	+ Lead Assignment Rules
	+ Lead Auto-Response Rules
	+ Campaigns
	+ Campaign Members
	+ Campaign Influence
* Social Contacts
* Social Listening
* Social Hub
* Salesforce for Twitter and Facebook
* List Views
* Reports Overview
	+ Reports Security
	+ Report Folders
	+ Reports Terminology
	+ Tabular Reports
	+ Summary Reports
	+ Matrix Reports
	+ Join Report
	+ Dates
	+ Report Filters
	+ Report Charts
	+ Bucket Fields
	+ Custom Summary Fields
	+ Custom Report Types
	+ Scheduling Reports
* Dashboard Overview
	+ Pre-built Dashboards
	+ Running User
	+ Scheduling Dashboards
* Content
* Salesforce Communities
* Force.com Sites
* Performance Optimization
* Deployment & Change Management
	+ Metadata API
	+ Packages
	+ Change Sets
* User Adoption
* Session Wrap-up
* Conclusion