

**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