

# Salesforce Business Analyst Training Course Content

## Course Outline

### 1. Basics and Overview

- What is Cloud Computing?
- Overview on SaaS, PaaS, IaaS
- What is CRM? Architecture of CRM and its uses.
- Creation of Salesforce Account for Practice.
- Overview of MVC Model M-Model, V-View and C-Controller
- Deep understanding on Application, Objects, Fields, Tabs

### 2. Understanding Salesforce

- Understanding Salesforce User Interface
- Understanding Sales Standard App
- Objects – Standard & Custom
- Fields – Standard & Custom
- Data Types
- Creation of Object, Tab & App
- Field Dependencies – State & Country Example
- Object Relationships

### 3. Relationship and Lookup Filters

- Lookup Relationship and Master Detail Relationship
- Junction Object (Many To Many Relationship)
- Lookup Filters
- Formula Fields
- Rollup Summary Field

### 4. Records Types, Page Layout, Page Layout Assignment

- Introduction to Page Layout?
- Profiles – Set of Permissions, Visibilities
- Users and Profiles
- Permission Sets – Additional Permissions
- Field Level Security
- Record Types
- Record Types and Page Layouts
- Record Ownership

### 5. Sales Force CRM Functionality Overview

- Sharing Settings – OWD, Sharing Rules, Manual Sharing

- Organization Wide Defaults
- Sharing Rules

- Manual Sharing
- Creating Profile, Permission Set, Sharing Settings
- Creating Roles & Implementing Role Hierarchy
- Creating Queue, Setting up Public Groups

## **6. Workflow Automation, Process Builder, History Tracking**

- Validation Rules
- Workflows & Approval Processes
- Auditing Process
- Field History Tracking
- Data Management
- Process Builder

## **7- Implementing Business Processes**

- Setup Field Validation rules
- Configure field history tracking for auditing.
- Automate Business process using Process builder / Flow

## **8 –Visualforce Pages**

- What are the capabilities of the Visualforce?
- Incorporate Visualforce pages into Salesforce(Lightning and Classic)
- Implement JavaScript events within Visualforce pages.
- Introduction to Standard / Custom controller within VF pages
- Implementation of Extensions in Visualforce Pages.
- Adding styles using CSS Style Sheet tags.

## **9 - Force.com Triggers & Data**

- What are Triggers? Uses and Configuration (Developer Console)
- Introduction on SOQL and SOQL
- Test SOQL using workbench tool.

## **10 -Reports and Dashboards**

- Running and modifying default reports
- Creating new reports with the Report Builder(Lightning/ Classic).
- Working with Report Filters
- Summarizing with Formulas and Visual Summaries
- Scheduling reports
- Building dashboards (Lightning /Classic)