

**Kn Tech!**  
*Discover Learning*



# Salesforce CRM Masters Certification Program



## About Kn Tech

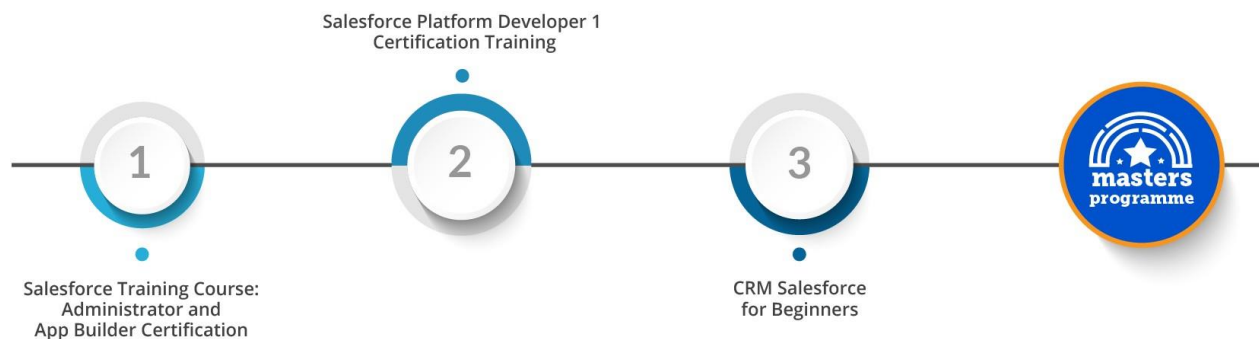
Kn tech is one of the world's largest and most effective online education platform for technology professionals. In a span of 10 years, 100,000+ students from over 176 countries have upskilled themselves with the help of our online courses. Since our inception, we have been dedicated to helping technology professionals from all corners of the world learn Programming, Data Science, Big Data, Cloud Computing, DevOps, Business Analytic, Java & Mobile Technologies, Software Testing, Web Development, System Engineering, Project Management, Digital Marketing, Business Intelligence, Cybersecurity, RPA and more.

We have an easy and affordable learning solution that is accessible to millions of learners. With our learners spread across countries like the US, India, UK, Canada, Singapore, Australia, Middle East, Brazil, and many others, we have built a community of over 1 million learners across the globe.

## About the Program

Kn tech Salesforce CRM Masters Certification Program is designed to meet the industry benchmarks and will help you prepare for the Salesforce Administrator Exam (ADM 201), Platform App Builder (CRT 403), and Salesforce Dev 450 Certification exams. This Salesforce Masters Program focuses on core Salesforce CRM skills which are indispensable for Salesforce professionals. Throughout the program, you will learn important concepts such as how to customize your application including page layouts, fields, tabs, create reports, customize applications programmatically using Apex code and Visualforce UI framework along with hands-on demonstrations.

# Salesforce CRM Masters Certification Program



## Elective Courses:

- Advanced MS Excel 2016 Certification Training
- SQL Essentials Training & Certification

## Index

- 1 Salesforce Training Course: Administrator and App Builder Certification
- 2 Salesforce Platform Developer 1 Certification Training
- 3 CRM Salesforce for Beginners
- 4 Advanced MS Excel 2016 Certification Training
- 5 SQL Essentials Training & Certification



# Salesforce Training Course: Administrator and App Builder

Course Curriculum

## Course Outline

### Module 1: **Introduction to Cloud Computing and Salesforce Platform**

#### **Topics:**

- What is Cloud Computing
- Define Service and Deployment models in the Cloud
- Market Situation
- Cloud ownership
- Introduction to SF1 and Force.com Platform
- Declarative & Programmatic Options in Force.com
- Explain Multi-tenant (single-tenant) Architecture
- Meta-data Driven Architecture
- Multi-tenant Architecture
- Business and IT benefits
- Use of SF1

### Module 2: **Building Blocks of Salesforce Platform**

#### **Topics:**

- Sign-up for a Free Environment / Org
- Adding company logo

- Benefits of System overview
- Salesforce Key Building Blocks
- Editions and Different Environments Available
- MVC Pattern
- Student App
- Student App Master Basic Data Model
- Student Master and Marks/Grades
- Student Master Basic Security Model
- Student Master Reports
- Student Master Application Scope

### **Module 3: Salesforce Data model, Objects, Relationships and Fields**

#### **Topics:**

- Custom Objects and understand various properties in the Object definition section
- Standard Objects
- Field and Data Types
- Custom Field Properties
- Field Dependencies
- Types of Relationship Fields
- Search Layouts

### **Module 4: Salesforce Security Model and its Features**

#### **Topics:**

- Security Model Mind Map
- System Level or Org Level Security
- User Administration and Troubleshooting
- Permission sets
- Profile and Permissions Sets

- Password Policy
- IP Address security
- Login Hours
- Session Settings
- Activations
- Page layout Assignment
- Tab Setting
- Field level security

**Module 5: Salesforce Security Model Object, Record and Field Level features**

**Topics:**

- Security Model Mind Map
- Record Level and Object Level
- Organization wide defaults
- Organization wide defaults – Student App
- Role and Role Hierarchy
- Criteria Based Sharing
- Different ways to gain Record Level Access
- Public Queue
- Group
- Public group Vs Queue

**Module 6: Business Logic, Formulas & Validations**

**Topics:**

- Business Logic Mind Map
- Business Options to Implement Business Logic
- Functions
- Formula
- Validation Rules

- Roll-up Summary Fields
- Record Types and Page Layouts

## **Module 7: Business Process Automation in Salesforce**

### **Topics:**

- Business Process Automation
- Business Requirements – Workflow Rules
- Workflow - Actions (Time When Action Takes Place)
- Workflow - Actions
- Workflow – Considerations
  
- Approvals – Introduction
- Approvals - How to Create A Process
- Approvals - Actions
- Approvals - How and What Can Approvers Do

## **Module 8: Customer Management using Salesforce Sales Cloud**

### **Topics:**

- Sales Cloud
- Sales Process
- Sales Productivity Features
- Lead Management
- Lead auto response
- Lead assignment
- Web to lead
- Accounts and Contacts Management
- Opportunities

- Campaign Management
- Price Book, Products, Price Book Entries

## **Module 9: Customer Service Solution using Salesforce Service Cloud**

### **Topics:**

- Service Cloud
- Case Management
- Typical Service and Support Process
- Automation - Web2Case and Auto-Response
- Automation - Email2Case
- Automation - Assignment Rules
- Automation - Escalation Rules
- Email Templates in Case Management
- Channels
- Case Resolution – Solutions
- Case Resolution Using Knowledge
- Communities Basics
- Communities Setup and Administration
- Communities – Ideas and Answers

## **Module 10: Data Handling and Processing in Salesforce**

### **Topics:**

- Data Handling and Processing Overview
- Exporting data and Regular Backup
- External ID and Unique Fields

- Import Data
- Apex Data loader
- Import Wizard and Data Loader and compare the features, Update, Upsert operations, Delete and Hard Delete records,
- Transfer record ownership

## **Module 11: Reports and Dashboards in Salesforce**

### **Topics:**

- Report with and without modifications
- Tabular report, summary and matrix report
- Report and Security
- Report Builder and Standard Reports Available
- Custom report type and store in a folder
- User filters in reports
- Dashboard
- Bucket field
- Tabular Report significance
- Summary report significance
- Matrix report significance
- Joined report significance
- Dynamic dashboard

## **Module 12: Salesforce 1, Lightning App Builder, Salesforce A, Outlook**

### **Topics:**

- Customizable parts of the SF1 app
- Security and customizable settings



- Navigation menu
- Compact layouts and Mobile cards
- Basic admin activities on Salesforce A
- Outlook and SF synch up

### **Module 13: Activity Management, AppExchange, Content and Folder Management**

#### **Topics:**

- Activity management - Tasks, Events and Open activities
- Tasks and events
- Folders and Document templates
- AppExchange

### **Module 14: Chatter, Global Action and Publisher Layout**

#### **Topics:**

- Chatter groups, feeds, people
- Files, Follow records, people
- Groups Topics and Files
- Global action types-Create
- Log a call, Custom VF page
- Custom canvas, Publisher layout
- Global an Object specific actions

### **Module 15: Salesforce Mobile**

#### **Topics:**

- Salesforce1

- SalesforceA
- Salesforce1 Vs SalesforceA

## **Module 16: Deployment Process in Salesforce**

### **Topics:**

- Outbound Change Sets
- Inbound Change Sets
- Deployment Settings

## **Module 17: Salesforce Project Application Lifecycle**

### **Topics:**

- Milestones
- Sandboxes
- Change Sets
- Packages

## **Module 18: Lightning in Salesforce**

### **Topics:**

- Lightning Components
- Lightning Component Capabilities
- Lightning Components vs. Visualforce

## **Module 19: Buttons and Link management in Salesforce**

**Topics:**

- Custom Buttons
- Custom Links
- Records with Actions
- Global Action
- Object Specific Action

**Module 20: Salesforce App Exchange**

**Topics:**

- AppExchange Overview
- Finding and Selecting an App
- Installing an App
- Finding a Developer
- Finding a Consultant



# SalesForce Platform Developer 1 Certification Training

Course Cuíiculum

## Course Outline

### **Module 1: Introduction to Cloud Computing and SFDC**

#### **Topics:**

- Service and Deployment models in the Cloud
- Market situation
- Cloud Ownership
- Introduction to SF1 and Force.com Platform
- Declarative & Programmatic Options in Force.com
- Meta-data Driven Architecture
- Multi-tenant Architecture
- Business and IT benefits
- Application Development Tools in Salesforce
- AppExchange as Application Development Strategy
- Finding and Navigating Salesforce Documentation
- Understanding Salesforce Trust

### **Module 2: Working on Custom Objects and Fields**

#### **Topics:**

- Standard and Custom objects
- Custom fields
- Relationship fields
- Formula fields
- Roll-up summary fields
- Junction Object
- Workflows and Process Builder

### **Module 3: Data Management in SFDC**

#### **Topics:**

- Data Management in Salesforce
- Data Import Wizard and Data Loader
- Import Data
- Export Data
- Data export wizard

### **Module 4: Introduction to APEX Programming**

#### **Topics:**

- APEX Introduction
- APEX Classes and Triggers
- Apex Development Process
- Apex Development tools
- Using Force.com IDE and Developer Console
- Apex Governor Limits

## **Module 5: Data Types and Logic Control Statements in APEX**

### **Topics:**

- Overview of Apex Data Types
- Primitive Data Types
- sObject Data Types
- Enum Data Types
- Collections Data Types
- Apex Operators
- Apex Control Statements
- Executing Apex Programs

## **Module 6: APEX Classes**

### **Topics:**

- Apex Classes
- Access Modifiers
- Apex Class Constructors
- Apex Class Variables and Methods
- Inheritance, Sharing, and Interface
- 'This' keyword
- Accessing Apex Class
- System Classes and Methods

## **Module 7: sObject Relationships, Implementing SOQL and SOSL Queries**

**Topics:**

- Standard Object and Field API Names
- Relationships in Apex
- SOQL Function, SOQL Bindings and SOQL For Loops
- Processing SOQL Query Output
- Dynamic Query Creation
- Relationship Query and its Types
- SOSL Query and its Implementation
- SOQL vs SOSL

**Module 8: Data Manipulation Language**

**Topics:**

- Data Manipulation Language
- Loops in DML
- Database.DML Options
- Transaction Control
- Ways to invoke DML Operations
- Invoking DML Operations
- Handling DML Errors

**Module 9: Trigger in APEX and APEX Transaction**

**Topics:**

- Apex Triggers and its Types
- The Save order of Execution
- Trigger Syntax and Events

- Trigger Context Variables
- Recursion in Triggers
- Bulk Field Triggers
- Trigger Helper Class Pattern
- Lifecycle of Apex Transaction
- Memory Cycle for Static Apex Variables

## **Module 10: Exception Handling and Debugging in APEX**

### **Topics:**

- Exceptions
- Exception Statements
- System-Defined Exception
- Exception Methods
- Catching Different Exception Types
- Custom or User-Defined Exception Handling
- Debugging Using Debug Logs
- Anonymous Blocks - Another Debugging Tool

## **Module 11: Testing Essentials and Design Strategies**

### **Topics:**

- Apex Testing Framework
- Write and run Apex Tests
- Create Tests data
- Running Test Units
- Developer Console
- Force.com IDE



- Testing Best Practices
- Batch Testing
- Efficient test code for DML and Query
- Code Coverage

## **Module 12: Deployment Strategies and Visualforce Pages**

### **Topics:**

- Application Development Lifecycle
- Different Development Environments
- Deployment - Migration of Applications and Components
- Best Practices for Deployment
- Introduction to Visualforce
- Creating Visualforce Page
- Launch Visualforce Page using Custom Button
- Fetching Records in a Visualforce Page
- Visualforce Best Practices
- Visualforce Governor Limits and Security Concerns
- Visualforce Strategies

## **Module 13: Working with Controllers and Controller Extensions**

### **Topics:**

- Controller Architecture
- Controller Methods
- Standard Controllers
- Custom Controllers
- Visualforce Controllers

- Controller Extension
- Controller Constructors
- Deploying Controllers
- Testing Controllers
- Security Concerns in Controllers and Visualforce
- Controller and Visualforce Integration
- Page References
- Action Methods, Getters, Setters and Properties

## **Module 14: Lightning Framework**

### **Topics:**

- Overview of Salesforce Lightning
- Lightning Component Framework Structure
- Benefits of Using Lightning Component Framework



# CRM SalesForce for Beginners

Course Curriculum

## Course Outline

### **Module 1 – Introduction to CRM and SFDC**

#### **Topics:**

- CRM Overview, Cloud Computing, Introduction to Salesforce.com (SFDC), SFDC Modules.

### **Module 2 – SFDC Overview**

#### **Topics:**

- SFDC Business objects & their application, Standard Business Objects, Custom Business Objects, Salesforce Data Model, Salesforce Relationships.

### **Module 3 – SFDC Security Model – 1**

#### **Topics:**

- Salesforce Data Fields, Salesforce Security Features, Organization Wide Default, Profiles, Roles.

### **Module 4 – SFDC Security Model - 2**

#### **Topics:**

- Records Mass Transfer, Sharing Rules & Application, Application of Roles & Sharing Rules, Profiles & Permission Sets.

### **Module 5 – SFDC Configuration - 1**

#### **Topics:**

- Profiles, Permission Sets, Page Layout, Record Type, Field Level Security.

### **Module 6 – SFDC Configuration - 2**

#### **Topics:**

- Marketing Cloud, Sales Cloud, Products & Price Book, Quote Management, Service Cloud, Activities, Analytics, Reports, Dashboards, Translation Workbench

### **Module 7 – SFDC Advanced Configuration - 1**

#### **Topics:**

- Queue, Assignment Rules, Auto Response, Approval Processes, Workflow, Escalation Rules, Validation Rule.

### **Module 8 – SFDC Advanced Configuration - 2**

#### **Topics:**

- Chatter, Content management, Data Loader, Deployment using Change Sets, Apex & Visual Force.