Tel +44 20 4571 2395
info@siliconbeachtraining.co.uk

CRM Salesforce for Beginners course is designed to provide delegates with the knowledge and skills required to master the concepts of CRM and its business implementations. The delegates will explore how cloud computing can change the way business use technology for engaging customers. We at Datrix Training provide training in different modes including online, onsite and classroom. We ensure that the training includes practical exercises so that the delegate can have a complete understanding of the subject. In this course, the delegates will also learn how to replace manual work and enhance work efficiency.

Customer Relationship Management (CRM) is a software that enables the users to store the information of the customer including their names, addresses, phone numbers and much more. It also keeps track of activities of customers such as websites visits, email, phone calls and more.

CRM Salesforce for Beginners course is designed for professionals who are involved in Customer Relationship Management. Salesforce helps the delegates in connecting with their customers in a new way. The delegates will learn how to identify customers needs and opportunities to help and address issues quickly. This will help them in building long-lasting relationships with customers. During the training program, the delegates will learn how to track and manage information of the customer actively. The delegates will learn how to connect the entire team from any device. They will be able to deliver instant insights and recommendations, captures customer emails, extend and customise the business growth and much more. CRM Salesforce enables the delegates to enhance customer loyalty, retention and satisfaction. Moreover, the delegates will be able to monitor and manage the business at any time and at any location.

Prerequisites

There are no prerequisites for attending this course.

Course Objectives

The delegates will learn how to:

- Reduce manual work
- Find more leads and close more deals
- Keep more customers with the business
- Enhance business growth

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- Salesforce Integration Mechanisms

Security and Authorization, and Authentication

- com Security
- Single Sign-on with Federated Identity using SAML
- Single Sign-on Delegated Authentication

Working with Salesforce Data

- Retrieving Data: Objects, SOQL and SOSL

SOAP API

- Working with SOAP API
- Working with the Partner WSDL
- Debugging and Testing
- Advanced API Techniques

JSON

- JSON Basics
- JSON Java
- JSON and C#

Force.com REST APIs

- The Basics of REST
- The REST API
- The Chatter API

Force.com Bulk API

- An Overview of the Bulk API
- Using the Bulk API to Modify Data
- Querying with the Bulk API

Force.com Streaming API

- The Architecture
- Working with the Streaming API
- Key Streaming API Facts

Data Loader in Architecture

- Data Loader Overview
- Including Data Loader in Architecture

Apex, Data Loader and Integrations

- Custom Apex Web Services
- Apex Callouts
- Email Services

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- Outbound Messaging
- Salesforce to Salesforce

Visualforce, Portals, Sites, Site.com, and Ideas Integration

- Mashups and Visualforce
- Portals Integration
- Sites
- com overview
- Ideas Integration

Design Workshop

- Review
- Architecting a Solution

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