

Course Code	Course Title	L	T	P	C
BMEE355L	Cloud Computing using Salesforce	3	0	0	3
Pre-requisite	NIL	Syllabus version			
		1.0			
Course Objectives					
<ol style="list-style-type: none"> 1. To learn and collaborate with business teams to design solutions, solve problems using the Salesforce platform, and automate workflows. 2. To gain expertise in managing customer data, generating reports, and creating user-friendly experiences within Salesforce. 3. To develop the skills to deliver regular reports that provide valuable insights to users and executives for informed decision-making. 					
Course Outcomes					
<ol style="list-style-type: none"> 1. Be able to understand how to manage changes to business processes, technology, and people with Salesforce. 2. Be able to improve the efficiency of business operations by proactively undertaking regular process analysis and documentation. 3. Be able to customize the user experience and manage profiles, permissions, roles, and groups with Salesforce 4. Be able to apply the Beginner's mind and continually stay up to date with new Salesforce technology and inspire others too 5. Be able to manage the end-to-end implementation of Salesforce, including the overall strategy and day-to-day activities involved in administering Salesforce. 					
Module:1	Salesforce Basics - Set Up, Manage & Securing	5 hours			
<p>Salesforce Platform Basics: Get Started with the Salesforce Platform, Discover Use Cases for the Platform, Understand the Salesforce Architecture, Navigate Setup, Power Up with AppExchange.</p> <p>Prepare Your Salesforce Org for Users: Set Up the Exchange Rate, Update the Exchange Rate with ACM, Customize the Home Page, Create a Unique Account List View, Create Chatter Groups.</p> <p>User Management: Add New Users, Control What Your Users Can Access</p> <p>Customize an Org to Support a New Business Unit: Manage User Access, Manage Chatter, Modify Your Data Model, Configure an Email Letterhead and Template, Automate Your Business Process.</p> <p>Identity Basics: Get to Know Salesforce Identity, Get To Know Your Salesforce Identity Users, Learn the Language of Identity</p>					
Module:2	Data Security & User Permissions	6 hours			
<p>Data Security : Overview of Data Security, Control Access to the Org, Control Access to Objects, Control Access to Fields, Control Access to Records, Create a Role Hierarchy, Define Sharing Rules</p> <p>Permission Set Groups: Get Started with Permission Set Groups, Create a Permission Set Group, Mute Permissions in Permission Set Groups</p> <p>Protect Your Data in Salesforce: Restrict Login Hours and IP Ranges, Create New Users and Allow a User to Delete Accounts, Set Organization-Wide Defaults and Create a Role Hierarchy, Create Sharing Rules, Set Up Account Teams</p>					

Module:3	Data Modeling & Lightning Customization	6 hours
<p>Data Modeling: Understand Custom & Standard Objects, Create Object Relationships, Work with Schema Builder</p> <p>Lightning Experience Customization: Set Up Your Org, Create and Customize Lightning Apps, Create and Customize List Views, Customize Record Highlights with Compact Layouts, Customize Record Details with Page Layouts, Create Custom Buttons and Links, Empower Your Users with Quick Actions</p> <p>Customize a Salesforce Object: Work with Standard and Custom Fields, Create Picklists and Field Dependencies, Create Lookup Filters, Create Formula Fields, Create Record Types, Create Account Page Layouts, Enable Account Field History Tracking, Create Validation Rules</p>		
Module:4	Building & Managing Sales Pipeline with Salesforce Lightning	7 hours
<p>Lightning App Builder: Get Started with the Lightning App Builder, Build a Custom Home Page for Lightning Experience, Build a Custom Record Page for Lightning Experience and Salesforce Mobile App, Build an App Home Lightning Page, Work with Custom Lightning Components</p> <p>Formulas and Validations: Use Formula Fields, Implement Roll-Up Summary Fields, Create Validation Rules.</p> <p>Accounts & Contacts for Lightning Experience: Store Information About Your Customers, Understand Account and Contact Relationships</p> <p>Leads & Opportunities for Lightning Experience: Create and Convert Leads as Potential Customers, Work Your Opportunities, Sell as a Team and Split the Credit, Visualize Success with Path and Kanban</p> <p>Products, Quotes, & Contracts: Create Price Books to Track Your Products, Configure Quotes for Your Customers and Track Contracts.</p> <p>Campaign Basics: Meet Salesforce Campaigns, Organize Campaigns, Determine Who You're Marketing To, Report on Your Campaigns</p> <p>Customize a Sales Path for Your Team: Customize a Sales Path, Customize Opportunity Stages, Work with Opportunities in the Kanban View</p>		
Module:5	Customer Service with Salesforce Service Cloud	7 hours
<p>Service Cloud for Lightning Experience: Begin Your Customer Service Journey, Administer Service Cloud, Automate Case Management, Create Digital Engagement on Multiple Channels.</p> <p>Set Up the Service Console: Set Up the Lightning Service Console, Customize Your Lightning Service Console Pages, Add the Softphone Utility to Your App, Set Up Web Chats for Your Console.</p> <p>Create a Process for Managing Support Cases: Create Support Processes, Create Record Types, Create an Escalation Rule</p> <p>Set Up Case Escalation and Entitlements: Create Support Processes, Create Case Queues and Assignment Rules, Create a Case Escalation Rule, Create an Automation with Flow Builder, Enable Entitlements and Set Up Service Contracts, Create an Entitlement Process, Create Service Contracts with Entitlements.</p> <p>Chatter Administration for Lightning Experience: Get Started with Chatter, Work with Chatter Groups, Enable Feed Tracking, Approve Records from a Chatter Feed, Develop a Rollout Strategy</p> <p>AppExchange Basics: Get Started with AppExchange, Navigate AppExchange, Explore AppExchange Listings, Install AppExchange Packages, Connect and Contribute to the AppExchange Community</p>		
Module:6	Importing, Exporting & Managing Duplicates	6 hours

Data Management: Import Data, Export Data Duplicate Management: Improve Data Quality in Salesforce, Resolve and Prevent Duplicate Data in Salesforce Import and Export with Data Management Tools: Use the Data Import Wizard, Use Dataloader.io to Export Data, Use Dataloader.io to Update Data		
Module:7	Reports, Dashboards, Approvals & Flows	6 hours
Reports & Dashboards for Lightning Experience: Introduction to Reports and Dashboards in Lightning Experience, Create Reports with the Report Builder, Format Reports, Visualize Your Data with the Lightning Dashboard Builder, Extend Your Reporting Strategy with AppExchange Create Reports and Dashboards for Sales and Marketing Managers: Create Report and Dashboard Folders, Create a Simple Custom Report, Filter Your Reports, Group and Categorize Your Data, Use Summary Formulas in Your Reports, Manage Reported Data, Visualize Your Data Approve Records with Approval Processes: Customize How Records Get Approved, Build an Approval Process Build a Discount Approval Process: Prepare Your Org, Create an Approval Process, Create Initial Submission Actions, Specify Final Approval and Rejection Actions Build a Simple Flow: Collect Contact Info from Your User, Check for a Matching Contact in Your Org, Branch the Flow, Create or Update a Contact Flow Builder Basics: Get Started with Automation, Go with the Flow, Meet Flow Builder, Learn About Flow Variables		
Module:8	Contemporary Issues	2hours
Guest lectures from Industry and, Research and Development Organizations		
		Total Lecture hours: 45 hours
Text Book(s)		
1.	Sharif Shaalan and Timothy Royer, "Salesforce for Beginners: A step-by-step guide to optimize sales and marketing and automate business processes with the Salesforce platform", 2nd Ed, 2022, PACKT Publishers	
2	Sharif Shaalan, "Salesforce for Beginners: A Step-by-step Guide to Creating, Managing, and Automating Sales and Marketing Processes", 2020, PACKT Publisher	
3	Johan Yu, "Salesforce Lightning Reporting and Dashboards: Create, customize, and manage your Salesforce reports and dashboards in depth with Lightning Experience", 2017, PACKT Publishers	
Reference Books		
1.	Paul Goodey, "Salesforce CRM - The Definitive Admin Handbook: Build, configure, and customize Salesforce CRM and mobile solutions", 5th Ed, 2019, PACKT Publisher	
2	Rakesh Gupta, "Mastering Salesforce CRM Administration", 2017, PACKT Publisher	
3.	Felicia Duarte, Rachele Hoffman, "Learn Salesforce Lightning: The Visual Guide to the Lightning UI", 2018, Wiley Apress	
4.	Ahsan Zafar, "Salesforce Data Architecture and Management: A pragmatic guide for aspiring Salesforce architects and developers to manage, govern, and secure their data effectively", 2021, PACKT Publishers	
5.	Saifullah Saifi and Ashwini Kumar Raj, "Cloud Computing Using Salesforce", 2021 BPB	

Mode of Evaluation: CAT, DA, Quiz, FAT			
Recommended by Board of Studies	23-05-2024		
Approved by Academic Council	No. 74	Date	13-06-2024