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Plan your study to suit your convenience and schedule.

CRM Training Course

Email Contact: info@educba.com



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Course Overview

In this Course you get to learn:

You get to learn how to use the best CRM software in the industry. We look at Salesforce CRM, Zoho CRM, Bitrix CRM, Agile CRM and Creation of Basic CRM by using Microsoft Excel VBA and SQL Express.

CRM Training Skill

You get to learn about the below skills:

SalesForce CRM: This tool will effectively execute the customer related tasks and intern help you to improve the business. The tool deals with the daily activities of the business.

Zoho CRM: It is a web designed CRM tool to facilitate business growth. It is preferred for small business. Zoho CRM can automate daily business activities.

FreeCRM Software: This software is the most user-friendly CRM tool. It pipelines different department communication into a single database and automated tasks.

Course Features



Course Duration -
37+Hours



Number of Courses



Verifiable
Certificates



Lifetime Access



Technical
Excellence

About CRM

What is CRM? CRM means Customer Relation Management, it is a technology for managing all your companies daily activities in a single place .

CRM Training

This is a Bundle Course that includes complete in-depth CRM Training into one course

This Bundle perfectly meets the requisite of the industry and gives you a better chance of being hired as CRM Training Professional

Section 1 . Introduction

- Introduction to Salesforce CRM
- Features of CRM

Section 2 . Overview

- Overview of Salesforce
- Get More Leads

Section 3 . Pricing and Activation

- Pricing of Salesforce
- Salesforce Activation

Section 4 . User Interface

- User Interface
- Changing Home Layouts
- System Status
- Set Up Assistant
- Object Manager
- Setup Profile
- Creating Role Hierarchy
- Sample User Setup
- Configure States and Countries
- All Matching Rules
- Company Information

Section 5 . Products and Leads

- Custom Tabs
- Leads and Accounts
- Creating Leads
- Creating Account
- Convert Lead
- Other Contact Options

Section 6 . Opportunities

- Salesforce Opportunities
- Salesforce Price Books
- Salesforce Orders

Section 3 .Pricing and Activation

- Salesforce Contracts
- Adding Contract Item
- Salesforce Assets
- Creating Assets

Section 8 .Campaigns

- Salesforce Campaigns
- Salesforce Tasks and Notes
- Salesforce Cases

Section 9. Dashboard, Reports, Foprecasts

- Salesforce Dashboard
- Reports and Forecasts

Section 1. Contents and Introduction

- Introduction to Customer Relationship Management
- CRM Features

Section 2 . Overview

- Overview of Zoho CRM
- ZOHO App Integration

Section 3 .Pricing and Activation

- Pricing of ZOHO CRM
- Account Activation ZOHO CRM

Section 4 . User Interface

- Learn the User Interface
- Customization Module
- List of Module
- Creating Modules
- Email Settings
- Tab Group
- Work Flow Rules

Section 5 .Accounts and Contacts,Vendors and Purchase Order

- Communication Management
Sample Question

Section 6 . Products and Campaigns

- Working with Products
- Stock Information
- Working with Campaigns

Section 7 .Price Books and Leads

- Working with Price Books
- Creating Products
- Working with Leads
- Create Quote

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Sample Question

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- Working with Products
- Stock Information
- Working with Campaigns

Section 7 .Price Books and Leads

- Working with Price Books
- Creating Products
- Working with Leads
- Create Quote

Section 8 . Deals and Quotes,Order and Invoices

- Working with Deals and Quotes
- Creating Quotes and Task
- Sales Order
- Creating Invoices

Section 9 . Activities and Projects,Cases and Solutions

- Activities and Projects
- Cases and Solutions
- Case Information

Section 10 . Dashboards,Reports and Forecasts

- CRM Dashboards
- Product Dashboards
- CRM Reports
- Sales Leads by Status
- CRM Forecasts

Section 11 . Forecasts Summary

- Forecasts Summary

Section 1 . Introduction

- Introduction to CRM
- What is CRM

Section 2 . User Interface

- Feature of CRM
- Task and Event Tracking
- Pricing Structure
- Enterprise and Private Label CRM
- CRM Pro Account
- Week Calendar
- Understand Setup
- Lookup Modes
- Profile Settings
- Profile and Default Preferences
- Setup Tab
- Personal User Settings

Section 3 . Calendar and Companies

- Calendar Mode
- Event Information
- Creating New Event
- Event Without Time

Section 4 . Contact and Deals

- Combined Form
- Create New Contact Information
- More on Contact Information
- Creating New Deal
- Product and Service
- Adding New Product Contact

Section 5 . Tasks and Cases

- Task Information
- Case Information
- Creating Case, Event and Task

Section 6 . Call Information

- Call Information
- Call Script
- Create Sales Target
- Deal Pipeline Report

Section 7 . Reports

- New Directory
- Sales Pitch Content
- Types of Reports
- Graph Type

Section 1. Contents and Introduction

- Introduction to Bitrix24
- Service Automation

Section 2. Overview

- Overview of Bitrix24
- Telephony and Private Cloud

Section 3. Pricing and Activation

- Pricing and Activation
- Plans and Pricing

Section 4. User Interface

- User Interface
- Activity Stream
- Chats and Call
- Doc Designer
- CRM and Other Options
- Currency and Company Details
- Workflow Business Trip
- Widget and SIP Phones
- Global Settings
- May Task and Conversation

Section 5. Users and Departments

- Users and Departments
- Company Structure

Section 6. Workgroups and Tasks

- Work Groups
- Working with Tasks
- Invite New Employees Task

Section 7 . Calander and Products

- Working with Calendar
- More on Calendar
- Working with Products
- Adding New Product

Section 8 . Contacts and Companies,Quotes

- Working with Leads
- Working with Contacts
- Working with Companies
- Working with Quotes
- Hoe to Create Quotes

Section 9 . Deals and Invoices

- Working with Deals
- Working with Invoices
- Sales Funnel

Section 10 . Reports

- Working with Reports
- Report name and Activity Report

Section 11 . CRM Forms

- CRM Forms

Section 1 . Introduction

- Introduction to Customer Relationship Management
- CRM Features

Section 2 . Learn the User Interface

- Learn the User Interface
- Agile CRM - Preferences
- Admin Settings
- More on Admin Settings
- Creating Tags
- Working on Integration

Section 3 . Working with Contacts and Companies

- Working with Deals
- Working with Invoices
- Sales Funnel

Section 4 . Working with Deals and Tasks

- Working with Deals
- Creating New Deal
- Working with Tasks
- My Pending Task

Section 5 . Working with Calendar and Online Calendar

- Working with Products
- Stock Information
- Working with Campaigns

Section 6 . Working with Reports

- Working with Marketing & Campaigns

Section 7 . Working with Marketing & Campaigns

- Working with Marketing
- Working with Campaigns
- Campaign Status
- Working on Triggers
- Details Editor
- Add Web Rules
- Agile CRM - Service

Section 6 .Working with Service Module

- Working on Labels
- New and Open Tickets
- Working on Sample User
- Working with Service Module
- Knowledge Base

Section 2 . Conclusion

- Conclusion

Section 1. Understanding Salesforce Developer

- Salesforce(Configuration and Customization)
- Introduction to Salesforce
- Salesforce(Create Salesforce app)

Section 2 . Understanding Cloud Computing

- Cloud Computing Services
- Characteristics of Cloud Computing
- Introduction to Cloud Computing

Section 4 . Warehouse

- Creating Warehouse App
- Creating Invoice Object
- Creating Its Relation
- Warehouse lookup relationship
- Warehouse Data Import using Custom object

Section 5 . Customizing Interface

- Customize user interface-View of data
- Customize user interface-Modify Page Layout
- Modify Page Layout continued
- Customize User Interface-Mobile Access Layout
- Customize user Interface-Enable Social Collaboration

Section 6 . Adding App Logic

- Adding App Logic-Automate Field Object using Workflow
- Updating Inventory
- Setting Workflow rule
- Adding Formula Field
- Adding Roll Up Summary Field

Section 7. Building App Logic

- Enforce Business Rule
- Enforcing Business Rule
- Creating an Approval Process
- More on Approval Process
- How to Use Approval Process
- How to add Flow Variable
- Adding Flow Form Screen
- Adding Record Create element
- Adding Confirmation Screen
- Adding Custom Button
- Adding Fault Screen
- Creating Sample Report
- Getting out more information from report and other

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- Adding Fault Screen
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Section 9 . VisualForce

- VisualForce IntroDuction
- Model,view & controller paradigm architecture
- VisualForce components
- visual force controller & pages
- System architecture with Developer and User Mode
- Benefits & use of visualforce

Section 10.Creating First Visualforce page

- Things should be known before start
- Creating & listing visualforce page
- Finding visualforce pages
- Editing visualforce pages

Section 11 . Add Attributes Using Auto

- How to add auto suggest attribute
- add additional component using APEX
- Adding nested components
- additional VisualForce components in page building
- Learning more components

Section 12 . Standard Controller

- Concept of standard controller
- Identifier of record
- Display Data from record
- Display fields from related records



Section 13 . Understanding Basic Formula

- Understanding formula and variable
- Global variable
- Basic Formula
- Functions with multiple parameter
- Conditionals
- Conditionals & app logic
formulas cheat sheet

Section 14 . Standard User Interface Component

- Visualforce-Standard User Interface Component
- VisualForce-View State
- action function tag in visual force

Section 1 . Introduction

- Reference Files
- Introduction to CRM using Power Point

Section 2. Basic Demo of Running CRM

- Basic Demo of Running CRM

Section 2 . VBA Learning Process and Access DB

- Development of CRM in VBA
- Learning Process Flow Diagram
- Client Machine

Section 4 . VBA Coding Explained

- VBA Coding Explained
- Dashboard
- Dashboard Coding
- Generic Function
- Store Combo
- Select Case Statement
- Load Details
- List View Additions
- Leads
- Other Loading details Explained
- Edit Data or Add a New Data and other

Section 5 . Admin Module

- Explain Admin Module
- Explain Coding and Admin
- Explain Dashboard

Section 6 . Conclusion

- Conclusion



Frequently Asked Questions

Can I access this CRM training from anywhere?

Yes, you can access this module from anywhere and everywhere. Once you register for the online bundle and have your login credentials you can start.

Within what duration will I be able to complete the course?

If you follow the instructions and understand what the course has to offer, then you will be able to finish the course in the specified time itself.



Customer Reviews

“

It is a long course that goes in very small details about each aspect of the Salesforce CRM platform. The level is basic and it is very descriptive, overall the speaker seems to have a lot of knowledge on the program and he tries to relate the course with small business, overall it does the job explaining Salesforce.

Jorge Dominguez

”

Trying to learn everything that makes service industry work I decided to undertake this as well and am glad I did the same. There is a whole new unexplored area I know I need to master before I find the right job. Thanks.

Mantas Khosravi



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