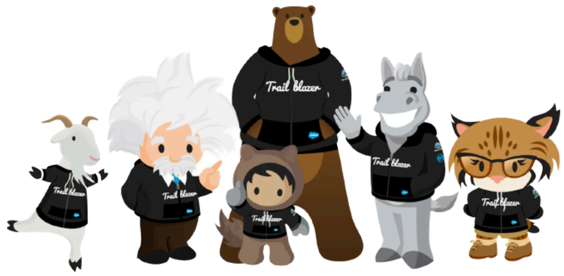


Salesforce Admin

1.1 Getting started with Salesforce

Before we start learning about Salesforce you will need to create a Salesforce Account which will help you to perform all tasks.

1. Create a salesforce developer Org.

    Learn about Salesforce
    - What is CRM?
    - What is Salesforce?
    - Why is Salesforce CRM important?

- What does Salesforce do?
- What is Salesforce used for?
- What are the benefits of using Salesforce?

2. Make a list of all available Salesforce editions and Environments, and what are the differences among them. Create a profile in Trailhead, start learning salesforce on that.

    Learn about different Salesforce Environments
    - Learn about the types of Editions
    1. Contact Manager edition
    2. Group Edition
    3. Developer Edition
    4. Personal Edition
    5. Professional Edition
    6. Enterprise Edition
    7. Unlimited Edition
    8. Performance Edition
    9. Database.com Edition

1.2 Sales Clouds

1. Learn about sales cloud
2. What is a Sales cloud?
3. How is the Sales cloud different from other clouds?
4. What's the purpose of using the Sales cloud?

1.3 Service Cloud

1. Learn about service cloud
2. What is a service cloud?
3. How is service cloud different from other clouds?
4. What's the purpose of using the service cloud?
5. Difference between sales clouds and service clouds.

1.4 Profile, User, Role, Permission Set

1. What is Profile and User?

2. What is Role?
3. What is Permission Set
4. Difference between Profile and Permission Set

Tasks:

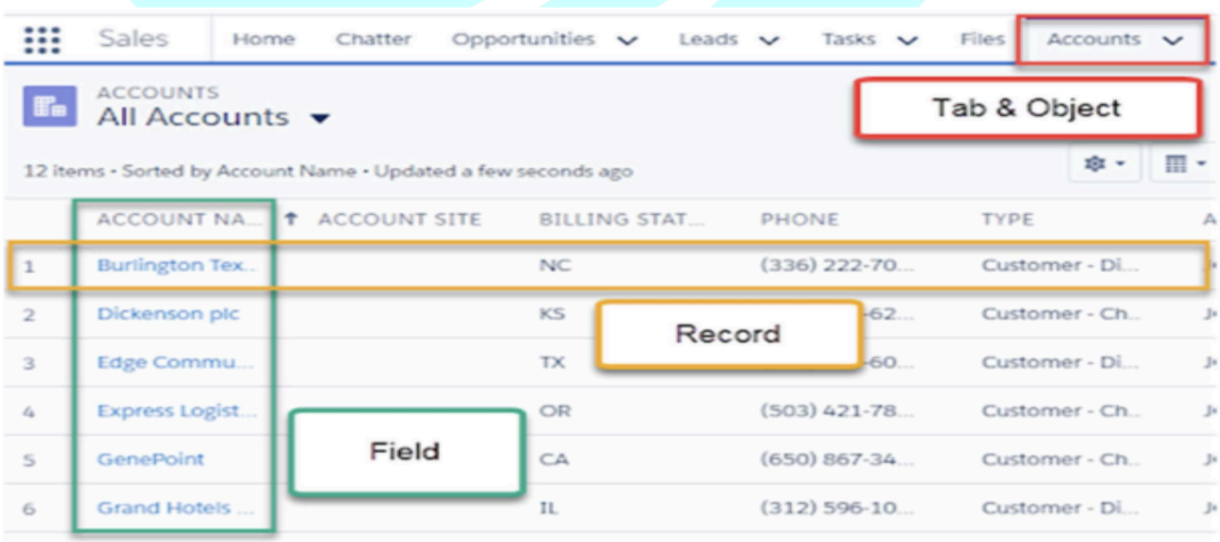
1. Create 2 users in Salesforce. One CEO and one Manager.
2. Now using the Profile / Role, create a system so that employees can't see CEO data and the CEO can see everyone's data

1.5 Object

1. Learn what are Salesforce Objects?
2. What are Standard objects?
3. What are custom Objects?
4. What is the difference between Standard objects and custom objects?
5. How to create Salesforce Objects?

Tasks:

- Create a custom object Student. Create the fields inside this object
  - Student name, roll no., mobile, parent mobile, address etc
  If a student is handicapped then there should be a checkbox called - handicap.



1.6 Fields

1. Learn What are fields?
2. What are the Types of fields?
3. Difference between custom fields and Standard Fields.
4. Learn how to create fields.
5. Learn about different data types.

<u>Tasks:</u>

- Create custom fields on objects with different data types.

1.7 Record Types

1. What is recordtype?
2. Learn about record type in detail.

<u>Tasks:</u>

- Create two record types and create records for respective recordtype.

1.8 Tabs and Application

1. Learn about tabs in Salesforce, what are the types of tabs available in Salesforce and try creating all of them.
2. Learn how to create an app
3. What is the use of creating an app?

<u>Tasks:</u>

- Create an app which contains 4 tabs (Account, contact, lead, task) and the name of the app should be 'MV Clouds'.
- Create an app for mobile and desktop separately.
- Create an app which contains 7 tabs 4 standard and 3 custom object tabs and also place a company logo in the org and customize your org accordingly.

1.9 Page Layouts

1. Create different page layouts for the object.
2. Remove and add fields in page layout.

Tasks:

- Create two diff Page Layouts as per Record Types.
- Assign this page layout to different record types which you have created in the previous task
- Page layouts of the object in which you have add custom button, quick action, and related lookup list add in related list section.

1.10 Global Action

1. Learn about global actions

Tasks:

- Create global action for the new Account object records

1.11 Schema Builder

1. What is the use of Schema Builder?

Tasks:

- Take a screenshot of all objects you created with their relationship in schema builder.

1.12 Field Dependency

1. Learn about field dependency.
2. How to create dependent fields in objects.
3. What are the Controlling fields and Dependent fields?

Tasks:

- Create a dependent field in any objects. (e.g. you are creating two picklists for one picklist for the country and another picklist for state)

- Create a dependency field in any object where the field type of checkbox and picklist

1.13 Custom Label and Static Resource

1. What is a Custom Label?
2. Why are we using Custom Label?
3. How to use Custom Labels in WorkFlow, Process Builder and Flow?
4. What is Static Resource?
5. Use of Static Resources.

Tasks:
- Create 5 Custom Labels.
- Create 10 Static Resources with diff types.

1.14 Custom Metadata and Custom Settings

1. What is custom metadata?
2. What is the use of custom metadata?
3. Difference between Custom Metadata and Custom Settings.
4. What is a Custom Settings?
5. Why are we using Custom Settings?
6. Difference between Custom Metadata and Custom Settings.

1.15 Chatter

1. Learn about chatter.

1.16 Web to Lead and Web to Case

1. What is the Web to lead in Salesforce?
2. What is Web to Case in Salesforce?

Tasks:
- How to set up the web to lead Salesforce.
- Create web-to-lead forms in salesforce.
- How to set up a web to case in salesforce.

- Create web to case forms in salesforce.

1.17 Create Lead Assignment Rule

1. Learn What are Lean assignment rules.
2. Purpose of creating Lead assignment rules.
3. Learn the ways of creating these rules.

Tasks:

- Create Lead assignment rules, as per the below criteria:
    i. Lead source equal to Website/Open House then assigns to the user - Bob.
    ii. Lead source equal to Reconnect/Digital Marketing/Referral then assigns to the user - Charlie

1.18 Approval Process

1. What is the Approval process?
2. Learn about the approval process.

1.19 Email Template, Email Alert

1. An email template is a predefined email layout that may already include content like images or text. Rather than create a new email from scratch each time, you can use a template as a Base.
2. What are the ways we can create and send email in Salesforce?
3. Create a nice email template with images in it, and send it to any contact whenever a contact is created.
4. Learn about Email Templates.
5. Create different Email templates.
6. What are merge fields in Email templates?

Send Individual Email Alert

1. How to send Individual Email?
2. Create a contact and send an email to that contact.

3. Send email and use merge fields in the email body.

1.20 Validation Rule

1. What is the validation rule?

Tasks:

- Create a validation rule on contact objects that users should not be able to add more than 10 digits on mobile phones.
- Create a validation rule on Account object if NumberOfEmployees more than 200 then it should display error while creating the account object record.
- Create a validation rule on the opportunity object that if the close date is less than five days before today then it should display an error message "close date should be appropriate".

1.21 Workflow

1. What is Workflow?
2. Learn about different criteria for workflow.
3. What is Time based Workflow?
4. What is Email Alert?

Tasks:

- Create a workflow builder that will send email after 1 min of createddate.
- Create a workflow when the account number starts with "100" then it should create related tasks.
- Opportunity Stage is changed to Closed Won then it'll Account Record after 5 Days.
- Send an Email whenever the Opportunity Stage Change from the Prospecting to Qualification.

1.22 Process Builder

Learn about Process Builder and why it is used, what all can be done using Process Builder.

Tasks:

- Create a process builder that will send an email after 7 min of the record created date.
- When the Contact Phone Field is updated then it'll automatically update their Account Phone Field.
- Send an Email whenever the Opportunity Stage Change from the Prospecting to Qualification.
- Create a Process Builder so that Whenever contact is updated, After 10 minutes email notification should be sent to that related parent Account emails.
- Create a process builder that will send a chatter message when a stage is Prospecting.
- Create a Process builder that will invoke flow when contact is edited and update firstname by your name in flow(After flow topic is covered)

1.23 Flow

1. Learn about flow.
2. What are the types of flows?
3. Difference between Process builder and flow.
4. What is sub-flow?

Tasks:

- When the Account is Deleted it'll automatically delete related opportunities and contacts.
- When the Contact Phone Field is updated then it'll automatically update their Account Phone Field.
- Create a flow that will send email after 56 min of created date.
- Create a flow that will send an email when there is the birthday of the respective contact.
- Create a flow on the account object when a new account is created, it will create a contact with the same name.
- Create a flow on the account object when a new account is created and create Contact as per Contact Count value (Create Field -ContactCount).
(e.g. if Contact count field value is 3 then it'll create 3 contact record)

- Create a custom object “risk calculation”, which has an account lookup. Create a field “total” on the object which you have created. Users sh ould be able to enter values less than 1000. The sum of all the related objects fields will be updated in the Total Amount field in the Account.
    - Create the new picklist field “Risk” in the Account object, and will be updated according to the sum.
    - This value of the picklists should show the following:
        i. 0-1000 || Low Risk
        ii. 1000-2000 || Medium Risk
        iii. More than 2000 || High Risk

1.24 Company Information

1. Learn about Company information and check which information we can get from there.
2. Learn about storage usage in salesforce.

1.25 Report

1. Learn what is Report.
2. Learn about report types in detail.
3. Learn about formulas, filters in reports.

<u>Tasks:</u>

- Create a report to display the average amount collected from an Opportunity in the current month.
- Create Reports for different report types. At least 5.
- Create reports with different charts.

1.26 Dashboard

1. What is a Dashboard?

2. Create dashboards with different charts.
3. Learn about folders where reports are stored.
4. Types of Dashboards in detail.
5. What are the differences between Report and Dashboard?

Tasks:

- Create a dashboard for displaying the above report.
- Create a custom report type and create a report, and dashboard for that.

1.27 Territory Rules

1. Learn about territory rules.

Tasks:

1. Create territory rules on the Account objects.

1.28 Sharing Rules

1. What is sharing rules?
2. How many types of sharing rules.

Tasks:

- Create a sharing rule on account object.

1.29 Restriction Rules

1. What are restriction rules?

Tasks:

- Create restriction rules on any objects.

1.30 Force.com Site

1. Learn what Force.com is and what its use is.
2. What is a Site Guest User?

3. Public Access Settings
4. What is a Site Template?

Tasks:

- Create a force.com site and publish it on the internet.
- Show the Error Page in the force.com site.
- Modified Active site Home Page.
- Modified Site Template

1.31 Platform Event

1. What is platform event?
2. Learn about platform events and use of platform events.
3. What are the ways to publish a platform event.

1.32 Communities

1. What is Community?
2. What is the diff between Community and force.com sites?
3. Note: You will learn more about the community in development part.

1.33 Sandbox

1. What is the use of sandbox?
2. How to create a sandbox

Tasks:

- Create a Sandbox in your personal Developer org.

1.34 Change Set and Deployment

1. What is the Outbound change set?
2. How to create an outbound change set
3. What is the Inbound change set?
4. How to create an inbound change set.

Tasks:

- Deploy one workflow,process builder and flow from sandbox to production environment.
- Deploy custom object, fields and pagelayout from sandbox to production environment.

1.35 Dataloader

1. What is Dataloader?
2. Setup Dataloader in your system.

Tasks:

- Create a CSV file in their minimum 50 records and this data to create records on Account, Contact, and Opportunity using of dataloader.
- Retrieve CSV file of the Opportunity object record.
- Update Contact Name field with Prefix MVClouds_ContactName.

1.36 Scratch org

1. What is Scratch org?
2. How to create Scratch org?
3. What is the use of Scratch org?
4. What is the Limit of Active Scratch org?
5. Active Scratch org expiration time?

Tasks:

- Create a Scratch org of your personal developer org.
- Migrate the Objects, Process Builder, Flow, Workflow and Approval Process from developer org to Scratch org.
- Perform Data load from developer org to Scratch org.

1.37 Ant Tool

1. What is Ant?
2. Setup Ant in your system.

Tasks:

- Deploy Objects, Custom Metadata, and Static Resource into your Scratch org using Ant tool.
- Create a Document of Ant Migration Tool.

1.38 Workbench

1. Deploy Objects, Custom Metadata, and Static Resources into your Scratch org using Ant tool.

<u>Tasks:</u>

- Create a CSV file in their minimum 50 records and this data to create records on Account, Contact, and Opportunity using of workbench.
- Retrieve CSV file of the Account and Contact object's record.
- Update the Account Name field with Prefix MV_AccountName.
- Perform Delete, Undelete, Upsert, and Purge operations of Contact, Account, and Opportunity record.
- What is the use of external id in custom Field perform 1 update operation using external id of Contact and Account field. (If any doubts communicate with Mentor)