

Salesforce

Administrator

Course curriculum

Course Curriculum

Introduction to Salesforce

- What is Cloud Computing?
- Types of Cloud Computing Services with examples
- Cloud Computing Architecture
- What is Salesforce?
- Services provided by salesforce
- What is CRM Process?
- Kinds of Apps developed by Salesforce
- Advantages of Salesforce
- Employment opportunities with Salesforce

Production and Sandbox Environments

- Production Environment
- Types of Sandbox Environments
- Registering with Developer Organization
- Salesforce Terminology

Creating a new Application

- Steps to create the Application
- Setting up the logo for Application

Creating an Object

- Steps to create the Object
- Different options involved while creating the object

Creating a Tab

- Steps to create the tab
- Different options involved with the tab

Creating custom fields

- Different Data Types involved while creating custom fields
- Different options involved with custom fields
- Changing the Default Currency Type
- Field Dependencies

Custom Validation Rules

- Steps to configure custom validations
- Different formula functions involved with custom validations

Search Layouts, Inline Editing, Enhanced List Views and Record Ids

- Enable more columns at tab level, search results level and look up dialog Level
- Working with inline editing
- Working with enhanced list views
- Analyzing Record Ids of the components

Creating Relationships

- Different Types of Relationships
- Creating a junction object

Creating Relationships

- Governor Limits in Salesforce

Page Layouts and Mini Page Layouts

- Different options available in page layout
- Steps to configure mini page layout
- Adding Related Lists to Layout

Record Types

- Steps to configure Record Types
- Creating Record Types for standard objects

Field History Tracking and Activities

- Steps to configure Field History Tracking
- Steps to enable and creating activates

Security in Salesforce

- Users in Salesforce and enabling Grant Login Access
- Profiles and Permission Sets
- Role Hierarchy
- OW OWD (Organization Wide Defaults)
- Manual Sharing and Sharing Rules
- Purpose of Grant Access using Hierarchies
- Purpose of View All, Modify All, View All Data and Modify All Data
- Apex Managed Sharing

Import Wizard and Data Loader

- Difference between Import Wizard and Data Loader
- Generating Security Token and Maintaining IP range using Trusted IP
- Data Loader Settings
- Data Loader Operations
- Purpose of External Id
- Purpose of Data Export

Workflow Rules

- Difference between evaluation criteria
- Difference between rule criteria
- Types of workflow actions
- Re-evaluation Criteria for Field Update
- Types of Email Templates
- Setting to enable Task Action
- Different scenarios with Workflow Rules

Approval Process

- Configuring Approval Process
- Different options available with Approval Process
- Creating custom hierarchy field
- Adding multiple steps to the approval process
- Purpose of Queues and steps to configure the Queue
- Difference between Queue and Public Group

Approval Process

- Working with the Queues
- Approving the records from Email

Lightning Process Builder

- Options involved with Process Builder
- Advantages over Workflow Rules
- Disadvantages over Workflow Rules
- Submitting the records for approval automatically

Reports and Dashboards

- Different types of Reports
- Scheduling the Reports
- Creating the Dashboard
- Different Components involved in Dashboard

Lead Generation

- Generating Web to Lead
- Generating Web to Case

Rules on Leads and Cases

- Assignment Rules
- Auto Responsive Rules
- Escalation Rules

Logs

- Debug Logs
- Debug Level
- Email Log Files

Jobs

- Bulk Data Load Jobs
- Scheduled Jobs
- Apex Jobs

Monitor

- System Overview
- Time-Based Workflow
- API Usage Notifications
- Case Escalations

Email Administration

- Deliverability
- Organization-Wide Addresses
- Compliance BCC Email
- Test Deliverability
- Apex Exception Email

Domain Management

- My Domain
- Domain