



SALESFORCE ADMIN

Course Curriculum

Module 1: Introduction to CRM & Salesforce

- What is CRM and why businesses use it
- Overview of Salesforce platform and ecosystem
- Salesforce Editions and Environments
- Navigation in Lightning Experience
- Understanding Sales Cloud and Service Cloud

Module 2: Salesforce Data Model

- Standard Objects and Custom Objects
- Fields and Field Types
- Lookup vs Master-Detail Relationships
- Schema Builder
- Page Layouts and Record Types
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Module 3: User Management & Security

- Creating and Managing Users
- Profiles and Permission Sets
- Roles and Role Hierarchy
- Organization-Wide Defaults (OWD)
- Sharing Rules and Manual Sharing
- Field-Level Security



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Module 4: Data Management

- Data Import Wizard
- Data Loader
- Exporting and Updating Data
- Duplicate Management
- Validation Rules and Data Quality

Module 5: Business Process Automation

- Introduction to Flow Builder
- Record-Triggered Flows
- Screen Flows
- Email Alerts and Notifications
- Approval Processes
- Task and Activity Automation

Module 6: Reports and Dashboards

- Creating Custom Reports
- Report Types and Filters
- Summary and Matrix Reports
- Dashboard Components
- Scheduling Reports



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Module 7: Application Customization

- Lightning App Builder
- Custom Apps, Tabs, and Objects
- Custom Buttons, Links, and Actions
- Compact Layouts
- Global Actions

Module 8: Email & Activity Management

- Email Templates
- Activity Tracking (Tasks, Events)
- Email Alerts and Workflow Notifications

Module 9: AppExchange & Integrations

- Installing Apps from AppExchange
- Connected Apps Overview
- Basics of Salesforce Integrations



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Module 10: Live Project – Real-Time CRM Use Case

- Lead to Opportunity Process
- Case Management Process
- Automation Implementation
- Reports & Dashboard Setup

Module 11: Salesforce Administrator Certification Preparation

- Exam Pattern and Syllabus
- Scenario-Based Questions
- Mock Tests and Practice Exams
- Interview Questions and Resume Guidance