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# Course Outline

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# Welcome to our Course

A Salesforce Administrator course provides the foundational knowledge and skills necessary to manage and configure the Salesforce platform and working as Salesforce Administrator/Admin.



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# What you will learn in this Course

After completing this course, you will Be fully prepared to pass the Salesforce Administrator Certification Exam Understand the core Salesforce functionalities with real-world applications, gain hands-on experience with Salesforce and build a strong foundation for a high-paying career in tech.



## THE KEY TAKEAWAYS FOR THE COURSE

- ✓ Always be learning
- ✓ Know that you don't know
- ✓ Ask for Help if necessary
- ✓ There's always a solution



# Course Outline

## Let's get Started

- > Download the Presentation used in the course.
- > What is Salesforce CRM???
- > Setup a free developer account in Salesforce.
- > Create free developer account.
- > Architecture of Salesforce Desc.
- > Architecture of Salesforce.

## Page Layouts in Salesforce

- > What are page layouts in Salesforce? How to create and edit Page Layouts ?

## Object and Fields in Salesforce

- > Overview of the Salesforce UI: What is Object, tab, Profiles & Users?
- > What is Object, tab, Profiles & Users? (Part 2).
- > What are objects and fields in Salesforce?
- > What is the difference between Standard and Custom Object in Salesforce?
- > Different types of Objects in Salesforce?
- > What are Standard and Custom fields in Salesforce?
- > How do I create a field in Salesforce Lightning?
- > How to create your own custom App in Salesforce?
- > Create custom app in Salesforce: Recruiting Application
- > Create Custom object in Salesforce: Position Object to keep track of Positions.
- > Adding custom fields on an Object via Object Manager.
- > How to add custom fields on an object via Schema Builder?
- > What are the different field types in Salesforce?
- > Create 2nd Object for our Recruiting Application: Candidate Object
- > Adding fields to our Custom Object in Salesforce.



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## Validation Rules In Salesforce

- > Validation Rule in Salesforce.
- > How to create Validation Rules in Salesforce?
- > Validation Rules in Salesforce: Create validation rules for Closed Date.
- > Validation Rules in Salesforce? Difference between && and AND.
- > Creating 2nd Validation Rule.
- > Create 3rd Validation Rule: Close Date should be after Open Date.
- > Create 4th Validation rule: Max Pay should not be greater than 1M.
- > Create 5th Validation Rule: US citizen and Visa Required.

## Formula fields in Salesforce

- > Formula fields in Salesforce: How do I create a formula field in Salesforce?
- > Formula fields in Salesforce: Create formula fields (Days Open).
- > How do I use an image from static resources in a Formula field?
- > Formula fields in Salesforce with Example.
- > IMAGE and Hyperlink function in formula fields in Salesforce.

## Different types of Relationship in Salesforce

- > Object relationships in salesforce.
- > Different types of Relationship in Salesforce.
- > One to many relationships in salesforce.
- > Create 3rd Custom Object for our Recruiting Application.
- > Lookup Relationship in Salesforce.
- > How to create a lookup relationship in salesforce?
- > Difference between lookup and master detail relationship in salesforce.
- > Create Review Object.
- > Create Review Object and its fields.
- > How to create a Master Detail relationship in Salesforce?
- > What is a roll up summary field in Salesforce?

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## Many to Many relationships in Salesforce: Junction Object

- > Creating custom Object in Salesforce.
- > What is Many to Many relationships in Salesforce?
- > Junction Object in Salesforce.

## Data Loader and Data Import Wizard

- > How do I Import Data Into Salesforce?
- > Importing records using Data Loader.
- > What is Data Loader and How do I use Data Loader?
- > Data Loader Setup Instructions.
- > How to Update records using Data Loader?
- > Delete records using Data Loader.
- > How to export Data from Salesforce using Data Loader?
- > What is Data import wizard in Salesforce?
- > How to insert records using Data Import Wizard in Salesforce?
- > Update Records Using Data Import Wizard.
- > What is the difference between data loader and import wizard?
- > Features of Data Import Wizard and Data Loader.

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## Sharing Settings

- > Types of Data Access: Organization, Object Level, Field & Record Level Access.
- > What are profiles in Salesforce? What do profiles control in Salesforce?
- > How do I assign an app to a profile in Salesforce? Changing App Settings.
- > What is tab visibility? Default On, Default Off and Tab Hidden setting.
- > Object level security in salesforce: How do I control object access in Sf.
- > How do I change the object level security in Salesforce?
- > Field Level Security: How to set field-Level security in Salesforce?
- > How to set the login hours and login IP ranges for the users in salesforce?
- > Overview of Profiles in Salesforce.
- > What are Permission set in salesforce?
- > How to create a permission set in salesforce lightning?
- > Changing Object setting and field settings via Permission Set.

## Data Security in Salesforce : OWD, Role Hierarchy, Sharing Rules, Manual Sharing

- > Organization Wide Defaults (OWD) in Salesforce.
- > What is record level access in Salesforce?
- > What happens if OWD is private?
- > Create a Role Hierarchy: How do I create a role in Salesforce?
- > Setup Role Hierarchy.
- > Grant Access using Hierarchies.
- > Sharing Rules (Create Sharing Rules in Salesforce).
- > Criteria Based Sharing Rule.
- > What does Read/Write on Sharing Setting mean when Profile for Object is Read only.
- > Create a New user and create a new profile.
- > Public Group in Salesforce.
- > Points to Remember for Sharing Rule.
- > Manual Sharing in Salesforce.

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## Special Permissions: View All, Modify All, View All Data and Modify All Data

- > What is View All and Modify All permission in Salesforce?
- > Modify All permission in Salesforce.
- > What is view all data and modify all data in Salesforce?
- > Where is the Recycle Bin in Salesforce?
- > Page layout and Record types in salesforce.



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## Automation tools in Salesforce : Workflows, Approval Process, Process Builder

- > What are workflows in Salesforce and why do we use workflows in Salesforce?
- > How do I send an email from a workflow in Salesforce?
- > How to set the criteria for your workflow rule in Salesforce?
- > What is a workflow field update in Salesforce?
- > How to create a Task using workflow?
- > Time Triggered workflow in Salesforce: How To Configure Time-Based Workflows?
- > Time Dependent Workflow Rule: Add Time-Dependent Action to Your Workflow Rule.
- > Summary of Workflow Rules.
- > Approval Process in Salesforce.
- > How to create Salesforce Approval Process from start to finish?
- > Approval process in salesforce lightning: Test the approval process.
- > Salesforce Approval Process.
- > What are queues in Salesforce? How do I create a queue in Salesforce?
- > How can a user edit a record during Approval Process even if they are not assigned.
- > Salesforce Approval Process: All You Need to Know.
- > Process builder in salesforce: Why do we use Process Builder?
- > Submit a record for Approval Using Process Builder.
- > Field update using process builder salesforce.
- > Create a related record using Process Builder in Salesforce.
- > How do I schedule an Email Notification using Process Builder in Salesforce?
- > How to create a Task using process builder?



# Course Outline



## Flows in Salesforce

- > Flows in Salesforce: Different types of flows in Salesforce.
- > What is a record triggered flow in Salesforce?
- > What is a Screen flow in Salesforce? How do you start a Screen flow?
- > Launch Screen flow from a Button in Salesforce.
- > Create Record using flow in Salesforce.
- > Send Email Alert from Salesforce flow.
- > What is schedule-triggered flow in Salesforce? How do I schedule a flow?
- > What is a platform event triggered flow?
- > Platform Event Triggered flow: Create a new record.
- > Platform event triggered flow: Connected app.
- > What Auto launched flows are?
- > Create Auto launched Flows in Salesforce Part 1.
- > Create Auto launched Flows in Salesforce Part 2.
- > Launch flow from Process Builder.
- > Invoke Flow from Apex.

## Standard Objects in Salesforce

- > What is the lead object in Salesforce? What are leads used for in Salesforce?
- > What is Web to lead in Salesforce? How do I use Web to lead in Salesforce?
- > What is Lead Assignment rule in Salesforce & How to create Lead Assignment rule?
- > Account Object in Salesforce: features and Capabilities of Account.
- > Contact Object in Salesforce.
- > Opportunity Object in Salesforce.
- > Features of Opportunity Object.
- > Case Object in Salesforce and its capabilities.
- > Web-To-Case in Salesforce.
- > Email-to-Case in Salesforce.
- > Case Auto Response rule in Salesforce.
- > Case Queues.
- > Case Assignment Rules in Salesforce.
- > Escalation Rules in Salesforce.



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## Reports and Dashboards in Salesforce

- > Reports in Salesforce.
- > Different Types of Report Format in Salesforce: Tabular, Summary, Matrix, Joined.
- > Summary Report in Salesforce. How to create a Summary Report in Salesforce?
- > Standard Report Types in Salesforce.
- > Matrix report in Salesforce? How do I create a Matrix Report?
- > Joined Reports in Salesforce: How to create Joined Reports in Salesforce?
- > Joined Report in Salesforce: How Joined Reports work?
- > Joined Report in Salesforce: Create Joined Report Organize Cases by Month.
- > Joined Reports In Salesforce: Summary and Important Points.
- > Custom Report Types in Salesforce: What are custom Reports types?
- > What is the difference between Standard Report type and custom report types?
- > Create a Custom Report type.
- > Create Salesforce Reports using Custom Report types.
- > Highlights of Custom Report type.
- > Dashboards in Salesforce: What are different types of dashboards in Salesforce?
- > Create a Dashboard Component.
- > Dynamic Dashboards in Salesforce
- > Subscribe to Dashboards in Salesforce.

## AppExchange

- > AppExchange Overview.
- > Install FieldTrip App in Salesforce.
- > Dashboard App In Salesforce.
- > InApp Guidance App.

## Application Lifecycle

- > What does Application Lifecycle include?
- > What are different types of sandboxes in Salesforce?
- > Different ways of deployment in salesforce.
- > Inbound and Outbound Change sets.





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# About Ademize

Learn . Grow . Succeed

Ademize Solutions is a US based IT Development & IT Training company committed to provide end-to-end IT Development Solutions and IT Training for becoming best IT Engineer.



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