

# Salesforce Admin Training Content

## 1. Salesforce:

- a. Introduction to CRM.
- b. What is Salesforce.
- c. Creating developer edition account in Salesforce.
- d. Different editions of Salesforce Orgs.
- e. Overview of developer edition Org.
- f. Overview of trailhead.
- g. Linking your org with trailhead.

## 2. Database Introduction:

- a. Relational Data Base.
- b. Database Model – Object Creation.
- c. Standard Objects.
- d. Standard Objects – Account, Contacts, Leads, Campaigns, Opportunities etc.
- e. Create Custom Objects.
- f. Standard Objects vs. Custom Objects.
- g. Create Custom Tabs.
- h. Custom tabs vs Custom objects.

## 3. Tab Creation:

- a. Types of tabs.
- b. Custom Object tabs.
- c. Visualforce Tabs.
- d. Web Tabs.
- e. Lightning Page Tabs.

## 4. Formula Field in Salesforce:

- a. Introduction.
- b. Need/Uses of Formula field.
- c. Creating Formula Field.

- d. Overview of formula editor.
- e. Creating advance formulas using formula field.

## **5. Roll Up Summary field:**

- a. Introduction.
- b. Use/Need of roll up summary fields.
- c. Prerequisites to create roll up summary field.
- d. Different types of operations with roll up summary fields.
- e. Sum operation with roll up summary fields.
- f. Max operation with roll up summary fields.
- g. Min operation with roll up summary fields.
- h. Count operation with roll up summary fields.

## **6. Relational Data Types:**

- a. What is Relationship in Salesforce.
- b. Need/Uses of relationship.
- c. Look up Relationship.
- d. Master-Detail Relationship.
- e. Self-Relationship.
- f. Hierarchical Relationship.
- g. External Relationship.
- h. Junction Object.
- i. Primary Relationship.
- j. Secondary Relationship.

## **7. Page-Layouts in Salesforce:**

- a. Introduction.
- b. Customize the page layouts.
- c. Defining Page layouts.
- d. Field order changes.
- e. Adding custom buttons and links.
- f. Defining required and read only fields.
- g. Adding related list.
- h. Adding Sections in Detail page.

## **8. Record Types in Salesforce:**

- a. Introduction.
- b. Uses/Need of Record Types.
- c. Create and maintain record types for your organization.
- d. Display different page layouts and picklist values based on record types.
- e. Assigning Record types to the Profiles.

## **9. Field Dependencies – Dependent Picklist Fields:**

- a. Introduction.
- b. Controlling field/Dependent field?
- c. Making dependent pick list fields.
- d. Limitations.

## **10. Validation Rules:**

- a. What are validation rules.
- b. Need/Use of validation rules.
- c. Overview of editor.
- d. Creating custom validation rules.

## **11. Work Flow Rules:**

- a. Introduction to Work Flow Rules.
- b. Work Flow Actions.
- c. Email Alert.
- d. Task Create.
- e. Field Update.
- f. OutBound messages.
- g. Difference Between Evaluation Criteria and Rule Criteria.
- h. Time-Based Workflows.
- i. Workflow vs Time-Based Workflows.
- j. Limitations of Work Flow rules.
- k. Workflow vs Triggers.

## **12. Process Builder:**

- a. Introduction to Process Builder.
- b. Process builder Actions.
- c. Workflow Rules Vs Process Builder.
- d. Different scenarios of Process builder.

## **13. Approval Process:**

- a. Introduction.
- b. Need/Use of approval Process.
- c. Creating approval process.
- d. Different scenarios of approval process.

## **14. Data Utilities:**

- a. Import using Application Import Wizard.
- b. Import Wizard Vs Data Loader.
- c. Mass Delete using Anonymous window.
- d. Understanding Storage (attachments, documents and records).
- e. Attachment upload with Data loader.
- f. Data Loader Insert.
- g. Data Loader Update.
- h. Data Loader Delete.
- i. Data Loader Upsert.
- j. Data Loader Export.
- k. Data Loader Exportall.
- l. Data Loader Delete.
- m. Data Loader Deleteall.

## **15. Users, Roles and Profiles, Permission Sets:**

- a. Creating Users.
- b. User Licenses Overview.
- c. Understanding Record Ownership and Access.
- d. Role Hierarchy.
- e. Creating Roles.

- f. Creating Profiles.
- g. Overview and different profiles.
- h. User Permissions.
- i. Permission Sets in Salesforce.
- j. Need/Use of permission sets in Salesforce.

**16. Security Models in Salesforce:**

- a. Different types of Security Models.
- b. Org. Level Security Model.
- c. Field Level Security Model.
- d. Object Level Security Model.
- e. Record Level Security Model.

**17. Report Types, Reports and Dashboards, Home page Components:**

- a. Creating Report Types for the Reports.
- b. Report Types, Reports & Dashboard Overview.
- c. Different Reports.
- d. Defining Custom Reports.
- e. Advanced Filters.
- f. Defining Dashboards.
- g. Home page Components.
- h. Differences between different Reports in Salesforce.

**18. AppExchange:**

- a. Introduction.
- b. Installing an app.
- c. Uninstalling an app.