

Salesforce Admin MASTERING

Domain Course Outline



LamBETIT CAREERS TRAINING MATERIALS

1.0 Cloud Introduction

1. What is CRM
2. Difference between legacy system and Cloud System
3. Multitenant Environment
4. Services provided by salesforce(SAAS,PAAS,IAAS)
5. Releases from salesforce
6. Types of sandboxes
7. Types of environment

2.0 CRM Process

**2.0 Methodology View, Approach & Techniques**

1. Product
2. Price
3. Marketing: Campaigns, Lead
4. Sales: Account, Contact, Opportunity
5. Services: Case, Solution

3.0 Org Creation

**3.0 Requirement View & Techniques**

1. Launching developer account
2. App Launcher
3. List view falters
4. Tabs, Objects, Records and fields
5. Object Manager
6. User creation
7. Login policies
8. Profile Audit and Login History
9. My settings
10. Company Information

Business Hours

Company settings

Calendar Settings

4.0 Data Model

**4.0 Project Experience & Mentoring Service**

1. Standard Objects
2. Custom Object creation

No of ways to create a Custom Object

1. Custom Object
2. Custom object from spread sheet
3. Schema Builder
4. Tab creation
5. Field Creation
6. Read and write fields
7. Read only field creation

Auto number creation

Formula field creation

Rollup summary field Creation

1. Relationship field

Lookup

Master and details

1. Validation rules
2. Custom label
3. Cross Object formula creation
4. Lookup filters
5. Field Dependency
6. Field history tracking
7. Custom setting
8. Custom Metadata

5.0 GUI Customization

**5.0 Deliverables Views & Domain Knowledge**

1. Page Layouts
2. Mini Page layouts
3. Compact Layout
4. Record types
5. Field set
6. Dynamic forms
7. Global actions and publish layouts
8. Object specific Actions

6.0 Lightning app builder

1. App page
2. Home page
3. Record page

7.0 Data Management

1. Data import (Create , Update, Upsert)
2. Data Export
3. Data loading(Create, Update, Upsert, Delete, Delete All, export, Export all)

8.0 Data security

1. Level of data access
2. User management
3. Managing password policies
4. Profiles
5. Permission set
6. Permission set groups
7. OWD
8. Sharing and settings
9. Manual sharing
10. Role creation
11. Assigning roles to users
12. Role based sharing
13. Restrict Login Access by IP Address
14. Restrict Login Access by Time
15. Duplicate rules
16. Matching rules

9.0 Automation

1. Approval Process

Jump Start Wizard

Standard Setup Wizard

1. Flows

Screen Flows

Record Trigger flows

Schedule Trigger flows

Platform Event trigger flows

Auto launched flows

Record Triggered Orchestration

10.0 Reports and Dashboard

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1. Introduction to Report Creation
2. Tabular Report
3. Summary Report
4. Matric Report
5. Join report
6. Custom report creation
7. Bucket field Creation
8. Chart report creation
9. Exporting a report
10. Dashboard creation
11. Placing dashboard on Lightning page