ZebLearn

Salesforce Admin

"Change is the end result of all true learning."

ZebLearn is an ISO 9001-2015 Certified Company that is co-founded by highly experienced industry professionals and alumni of top universities. It is headquartered at Noida & It is one of the fastest-growing solution providers in the field of Education, IT, Consulting and Corporate Trainings.

Salesforce Admin Syllabus

Salesforce Fundamentals

- ❖ Introduction to Salesforce
- ❖ Overview of Salesforce, its Editions
- ❖ Home Page Customization
- ❖ User Management
- ❖ Apps Creation
- ❖ Core CRM objects Capabilities
- ❖ Declarative Customizations Boundaries
- ❖ Programmatic Customizations Use Cases

Quote Templates – Preview, Create, and Activate

- ❖ Introduction to Quote Templates
- ❖ Quote record creation, its template, and quote PDF

Field Types and Salesforce Objects

- ❖ Field types overview
- ❖ Standard fields modification
- ❖ Creation of auto-number, formula, roll-up summary, lookup & master-detail, and checkbox fields
- ❖ Creation of number, currency, and percent fields
- ❖ Creation of geolocation, phone, and email fields
- ❖ Creation of date & time fields
- ❖ Creation of text and text area fields
- ❖ Creation of URL, encrypted fields, etc.
- ❖ Salesforce objects introduction
- ❖ Components, standard objects, and its modification
- ❖ External objects and creation of custom objects

Salesforce Admin Syllabus

Creation of Custom Buttons, Link units, and Actions

- ❖ Creation of buttons, links, and actions overview
- ❖ Creation of new records with actions
- ❖ Call logging with actions
- ❖ Record updating
- ❖ Creation of custom buttons and custom links, etc.

Salesforce Workflow, Schema Builder, and Process Builder

- ❖ Overview of visual workflow, schema builder, and process builder
- ❖ Creation of visual flow
- ❖ Modification of the existing workflows
- ❖ Creation of process
- ❖ Field creation in the schema builder

Validation and Workflow Rules

- ❖ Overview of validation rules, its creation
- ❖ Creation of formulas
- ❖ Creation of error messages
- ❖ Overview of workflow rules
- ❖ Creation of Workflow rule, Field update, Task assignment, Email alert

Creation of Role Hierarchy

- ❖ Overview of the role hierarchy
- ❖ Creating-Roles, Groups, Permission Sets
- ❖ Enabling field history
- ❖ Assigning Roles to Users

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Security Data Security Model

- ❖ Restricting logins
- ❖ Object access determination
- ❖ Record access configuration
- ❖ Creation of role hierarchy
- ❖ Record access exceptions

Salesforce User ProfilesPreview

- ❖ Profiles introduction
- ❖ Overview of standard profiles
- ❖ Page layouts assigning
- ❖ Settings
    - ❖ Custom app and its access
    - ❖ Tab
    - ❖ Record type
- ❖ Permissions
    - ❖ Administrative
    - ❖ General user
    - ❖ Standard object
    - ❖ Custom object
- ❖ Password guidelines
- ❖ Session timeout, hours of log in, IP ranges
- ❖ Field-level security
- ❖ Access of Apex and Visualforce

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Salesforce Reporting and Dashboards

- ❖ Reports introduction
- ❖ Report formats
- ❖ Creation of:
  - ❖ Leads report
  - ❖ Creating contacts
  - ❖ Accounts report
  - ❖ Opportunity report
  - ❖ Charts
  - ❖ Scheduling report
  - ❖ Campaign report
  - ❖ Report formula
- ❖ Using report to add the leads to campaign
- ❖ Reports export to Excel
- ❖ Dashboards introduction
- ❖ Dashboard
  - ❖ Creation and refreshing dashboard
  - ❖ Modifying columns
  - ❖ Adding filter
  - ❖ Adding reports
  - ❖ Interfaces
- ❖ Access management
- ❖ Dynamic dashboards configuration
- ❖ Report builder activation on profiles

Data Management in Salesforce

- ❖ Data management introduction
- ❖ Importing
  - ❖ Leads
  - ❖ Contacts
  - ❖ Accounts
- ❖ Installation of data loader

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- ❖ Mass delete
- ❖ Records
    - ❖ Importing with data loader
    - ❖ Exporting with data Loader
    - ❖ Updating with data Loader
    - ❖ Deleting with data Loader
- ❖ Addition of field to schema builder, etc.

AppExchange

- ❖ AppExchange Introduction and Overview
- ❖ Finding
    - ❖ App
    - ❖ Developer
    - ❖ Consultant

Deploying a Change Set

- ❖ Change Sets introduction and its Deployment
- ❖ Change Sets
    - ❖ Inbound
    - ❖ Outbound
- ❖ Deployment
    - ❖ Settings
    - ❖ Status
- ❖ Eclipse IDE

User Interface in Salesforce

- ❖ User Interface Introduction
    - ❖ General Options
    - ❖ Sidebar Options
    - ❖ Calendar Options
    - ❖ Name Settings
    - ❖ Setup Option

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UI component dynamic update

❖ Dynamically updating UI components, JavaScript controller actions for firing events in Lightning Component Framework, event declaration using aura:event tag in a .evt resource.

Event handling

❖ Event-driven programming using JavaScript, Java Swing, the component event and application event, writing handlers in JavaScript controller actions.

Server side controller

❖ Creating server side controller in Apex, @Aura Enabled annotation, annotation to enable client and server-side access to controlled method, calling a server-side controller action from a client-side controller.

Hands on example of Server side controller

❖ A real example of deploying Server side controller by pulling data from Opportunity object, creating Client side controller to invoke Server side controller and passing the returned value to components.

Mobile

❖ Describe the declarative customization options available for the Salesforce mobile application user interface.

APP DEVELOPMENT

❖ Describe the key milestones and considerations when managing the application lifecycle.

❖ Describe the differences between and considerations when using the various types of sandboxes.

❖ Describe the capabilities of and considerations when using change sets

❖ Describe the use cases of and considerations when using unmanaged packages

Thanks you

Now or Never