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SALESFORCE ADMINISTRATOR

TECH SOLUTIONS



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Week 1: Introduction to Salesforce, Setup, and Basic Administration

Day 1: Overview of Salesforce Ecosystem & Cloud Computing Concepts

- Salesforce Ecosystem: Introduction to the cloud-based platform and its benefits.
- Cloud Computing Models: SaaS, PaaS, IaaS.
- Salesforce Products: Sales Cloud, Service Cloud, Marketing Cloud.
- Salesforce's Role in Cloud Computing.

Day 2: Navigating Salesforce – Classic vs. Lightning Experience

- Salesforce Navigation: Classic vs. Lightning Interface.
- Basic Navigation Elements: Tabs, Search, Records.
- Switching Between Classic and Lightning.
- **Project:** Navigating both Classic and Lightning interface.

Day 3: Understanding Salesforce Data Model

- Salesforce Data Model: Objects, Fields, Relationships.
- Custom vs. Standard Objects.
- Understanding Record Types and Page Layouts.
- **Project:** Create custom objects and fields.

Day 4: User Setup and Management (Part 1)

- Creating and Managing Users: How to create users, login, and reset passwords.
- Profiles, Roles, and Permission Sets: Overview and usage.
- **Project:** Create and manage users, assign roles and profiles.

Day 5: User Setup and Management (Part 2)

- Field-Level Security, Record Types, and Page Layouts: How they affect user access and visibility.
- Organization-Wide Defaults (OWD): Configuring data access.
- Security Settings: Profiles, Permission Sets, and Sharing Rules.
- **Project:** Configure OWD and user permissions.

Week 2: Data Management, Security, and Advanced Automation

Day 6: Data Management and Tools – Importing & Exporting Data

- Importing Data: Using Data Import Wizard and Data Loader.
- Exporting Data: Best practices for exporting Salesforce data.
- **Project:** Import and export data using the tools.

Day 7: Data Validation & Quality Management

- Validation Rules: Setting up data validation rules.
- Duplicate Management: How to prevent duplicate records.
- Matching Rules: Setup and use cases.
- **Project:** Set up validation rules and data quality checks.

Day 8: Advanced Salesforce Security Model (Part 1)

- Object-Level Security: Protecting access to objects.
- Field-Level Security: Protecting sensitive data.
- Sharing Rules: Automated sharing configurations.
- **Project:** Configure object and field-level security.

Day 9: Advanced Salesforce Security Model (Part 2)

- Manual Sharing: Sharing specific records.
- Apex Sharing: How to use Apex for fine-grained sharing.
- Public Groups, Queues, and Teams: Managing group access.
- **Project:** Configure sharing settings and queues.

Day 10: Introduction to Process Automation

- Workflow Rules: What they are and when to use them.
- Process Builder: Overview and simple use cases.
- **Project:** Create a basic workflow rule and process in Process Builder.

Week 3: Advanced Automation, Reports, and Dashboards

Day 11: Flow Builder – Introduction and Record-Triggered Flows

- Introduction to Flow Builder: Basic overview.
- Record-Triggered Flows: When and how to use them.
- **Project:** Create a simple record-triggered flow.

Day 12: Flow Builder – Screen Flows and Flow Types

- Screen Flows: Designing user-driven flows.
- Other Flow Types: Scheduled Flows, Record-Triggered Flows.
- **Project:** Build a screen flow for user interaction.

Day 13: Flow Builder – Error Handling and Fault Paths

- Error Handling in Flows: Best practices.
- Fault Paths: Designing fault paths for error resolution.
- **Project:** Add error handling to a flow.

Day 14: Comparing Process Builder, Flow, and Workflow Rules

- Differences between Workflow, Process Builder, and Flow.
- When to use each tool: Pros and cons.
- **Project:** Compare all three automation tools in practice.

Day 15: Reports and Dashboards – Basics

- Creating Reports: Summary, Matrix, and Joined reports.
- Customization: Adding fields, filters, and formatting.
- **Project:** Create a basic report and add filters.

Week 4: Salesforce Security, Sharing, and UI Customization

Day 16: Advanced Security Configuration – Role Hierarchy and Sharing

- Role Hierarchy: Managing user access and data visibility.
- Manual Sharing: Sharing individual records.
- Apex Managed Sharing: Sharing via Apex code.
- **Project:** Configure role hierarchy and manual sharing.

Day 17: Security Health Check & Data Masking

- Security Health Check: How to monitor and improve security settings.
- Data Masking: Setting up data masking for compliance.
- **Project:** Perform a Security Health Check.

Day 18: Customizing Lightning Pages with App Builder

- Lightning App Builder: Overview of customization options.
- Designing Pages: Adding components, tabs, and layouts.
- **Project:** Customize a Lightning page using App Builder.

Day 19: Creating Custom Fields and Picklists

- Custom Fields: Creating different types of fields (Text, Date, Picklist, etc.).
- Picklists: Setting up global picklists.
- **Project:** Create custom fields and picklists.

Day 20: Designing Page Layouts and Mobile Setup

- Page Layouts: Designing and customizing layouts.
- Mobile Setup: Configuring Salesforce mobile app for users.
- **Project:** Customize page layouts and configure mobile settings.

Week 5: AppExchange, Change Management, and Governance

Day 21: AppExchange Overview and Installation

- AppExchange: Exploring third-party applications.
- Installing Apps: How to install and configure apps from AppExchange.
- Project: Install an app from AppExchange.

Day 22: Managing and Securing Installed Apps

- Managing Apps: Configuring and securing installed apps.
- Permissions and User Access: Granting appropriate access to apps.
- Project: Manage an app installed from AppExchange.

Day 23: Introduction to Sandboxes and Change Management

- Sandboxes: Types of sandboxes (Developer, Partial Copy, Full).
- Change Sets: How to deploy changes to production.
- Project: Create and configure a sandbox.

Day 24: Deployment Methods (CLI, ANT Migration Tool)

- Salesforce CLI: Introduction to Salesforce Command Line Interface.
- ANT Migration Tool: Using ANT for deployment.
- Project: Deploy changes using Salesforce CLI.

Day 25: Governance and Limits

- Salesforce Governor Limits: Understanding data and API limits.
- Monitoring: How to track usage and limit consumption.
- Project: Monitor API usage and data storage.

Week 6: Multi-Currency, Multi-Language, and Final Project

Day 26: Multi-Currency Setup and Configuration

- Multi-Currency: Enabling and configuring multi-currency.
- Currency Conversion Rates: Managing exchange rates.
- Project: Configure multi-currency settings.

Day 27: Multi-Language Setup and Configuration

- Multi-Language: Enabling language options in Salesforce.
- Language Settings: Managing user-specific language preferences.
- Project: Set up multi-language configurations.

Day 28: Final Project – Recap and Planning

- Recap of All Topics: Review key concepts from previous weeks.
- Final Project Overview: Setting up a Sales Cloud Org, configuring users, security, reports, and automation.
- Project Planning: Breakdown of tasks to complete the project.
- Project: Start working on the final project.

Day 29: Final Project – Work on Project Tasks

- Final Project Work: Apply all concepts (Users, Automation, Reports, Security, etc.).
- Review and Adjust: Make adjustments and configurations as necessary.

Day 30: Final Project – Completion and Presentation

- Complete Final Project: Finish configuring the Sales Cloud Org.
- Final Review: Present and discuss the project.
- Feedback and Questions: Address any remaining questions and concerns.