Faysal Aziz

Salesforce Admin Course

FA-0400 · 2-day

DevOps, Cloud & Infrastructure · Data & Analytics · Automation, RPA & Power Platform

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Introduction

The Salesforce Admin course is a comprehensive 2-day training program that provides an in-depth understanding of Salesforce Administration. It covers all aspects of Salesforce Administration from setting up and configuring Salesforce to managing data, creating workflows, and collaborating with Chatter and Communities. The course is designed for both beginners and experienced professionals looking to enhance their skills in Salesforce Administration. The hands-on exercises and practical examples provided in the course enable participants to gain practical experience in Salesforce Administration. Upon completion of the course, participants will have the knowledge and skills needed to become a successful Salesforce Administrator and be able to contribute to the success of their organization's Salesforce implementation.

Learning Outcome

Upon completion of the Salesforce Admin course, participants will be able to:

- Understand the Salesforce architecture and data model
- Set up and configure Salesforce, including creating and managing users, profiles, and permission sets
- Customize fields and objects in Salesforce
- Import and export data and create reports and dashboards in Salesforce
- Automate processes in Salesforce using workflows and process builder
- Manage sales processes, leads, accounts, and opportunities in Sales Cloud
- Manage service processes, cases, and solutions in Service Cloud
- Collaborate with Chatter and Communities in Salesforce
- Apply best practices for Salesforce Administration
- Gain practical experience in Salesforce Administration through hands-on exercises and practical examples.

Prerequisites

The prerequisites for the Salesforce Admin course are:

- Basic computer literacy, including proficiency with using a web browser, navigating web pages, and downloading and installing software applications.
- Familiarity with basic database concepts such as tables, fields, and relationships.
- Basic understanding of CRM concepts and processes such as sales, marketing, and customer service.
- A willingness to learn and engage in hands-on exercises and practical examples provided in the course.
- It is not mandatory to have any previous experience with Salesforce to take this course, but having some familiarity with the Salesforce platform and its capabilities would be helpful.

Training outline

1. Day 1:

Module 1: Introduction to Salesforce Administration

- Overview of Salesforce and its benefits
- Role of Salesforce Administrator
- Understanding Salesforce architecture and data model

Module 2: Salesforce Setup and Configuration

- Overview of Salesforce Setup
- Customizing fields and objects
- Creating and managing users, profiles, and permission sets

Module 3: Data Management in Salesforce

- Understanding data import and export in Salesforce
- Creating and managing reports and dashboards
- Overview of data security and sharing rules

Module 4: Automation and Workflows in Salesforce

- Introduction to automation in Salesforce
- Creating and managing workflows
- Overview of approval processes and process builder

2. Day 2:

Module 5: Sales Cloud Administration

- Overview of Sales Cloud
- Customizing sales processes in Salesforce
- Managing leads, accounts, and opportunities

Module 6: Service Cloud Administration

- Overview of Service Cloud
- Customizing service processes in Salesforce
- Managing cases and solutions

Module 7: Collaboration in Salesforce

- Overview of collaboration in Salesforce
- Understanding Chatter and Communities
- Creating and managing groups, feeds, and files

Module 8: Advanced Administration and Best Practices

- Advanced customization and configuration in Salesforce
- Overview of Apex and Visualforce
- Best practices for Salesforce Administration

Each module will have a mix of theoretical concepts, demos, and hands-on exercises for participants to practice their learning. Additionally, there will be quizzes and assessments at the end of each module to evaluate participants' understanding.

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