Techno India NJR Institute of Technology, Udaipur

Salesforce Administration Training

Time: 3 Months

ORGANIZATION SETUP

- Describe the components of the company profile (e.g., fiscal year, business hours, currency management, default settings, company information).

USER SETUP

- Identify the steps to set up and/or maintain a user (e.g., assign licenses, reset passwords, and resolve locked user accounts).
- Given a scenario, troubleshoot common user access and visibility issues.

GLOBAL USER INTERFACE

- Distinguish between the various UI features that an administrator controls, including the implications (e.g., UI settings, search settings, list views, home page layouts).

SECURITY AND ACCESS

- Explain the various organization security options (e.g., passwords, IP restrictions, identity confirmation, network settings).
- Describe the features and capabilities of the Salesforce sharing model (e.g., record ownership, organization-wide defaults, roles and the role hierarchy, manual sharing, sharing rules and public groups).
- Given a scenario, apply the appropriate security controls (e.g., organizationwide defaults, roles and the role hierarchy, manual sharing, sharing rules and public groups).
- Describe the various settings and permissions a profile controls (e.g., IP access, login hours, record types, access to tabs, permissions, object permissions, fieldlevel security).
- Given a scenario, determine the appropriate use of a custom profile. Weighting 1% Weighting 15% Weighting 9% Weighting 1%

STANDARD AND CUSTOM OBJECTS

- Describe the standard object architecture and relationship model.
- Explain how to create, delete, and customize fields, page layouts, and list views for custom and standard objects.
- Given a scenario, determine the appropriate fields and page layouts for custom and standard objects.

- Explain how to create, delete, and customize record types for custom and standard objects.
- Given a scenario, determine the appropriate record types and business processes for custom and standard objects.
- Explain the implications of deleting fields.
- Describe when to use and how to create formula fields.

SALES AND MARKETING APPLICATIONS

- Given a scenario, identify the capabilities and implications of the sales process.
- Given a scenario, identify when to apply the appropriate sales productivity features (e.g., big deal alerts, update reminders, similar opportunities, competitors, team selling).
- Describe the capabilities of products and price books.
- Describe the capabilities of lead management (e.g., lead conversions, lead source, lead field mapping).
- Given a scenario, identify how to automate lead management (e.g., queues, assignment rules, web-to-lead, and auto-response).
- Describe the capabilities of campaign management (e.g., hierarchies, influences, campaign members).

SERVICE AND SUPPORT APPLICATIONS

- Describe the capabilities of case management (e.g., case processes, case settings, and case comments).
- Given a scenario, identify how to automate case management (e.g., case assignment, auto-response, escalation, web-to-case, email-to-case, case teams).
- Describe the capabilities of solution management (e.g., settings, categories, processes).
- Describe the basic capabilities of portals. ♣ Describe the capabilities of the Community application (e.g. Ideas, Answers).
- Describe the capabilities of Salesforce Knowledge. Weighting 18% Weighting 6% Weighting 9%

ACTIVITY MANAGEMENT

- Describe the capabilities of activity management (e.g., manage tasks, events, public calendars, multi-day events, cloud scheduler).

CHATTER

Describe the features of Chatter (e.g., feed, groups, following, security).

DATA MANAGEMENT

- Describe the considerations when importing, updating, transferring, and mass deleting data (e.g., CSV files, field matching, matching types, record IDs, external IDs, duplicate records).

- Given a scenario, identify tools and use cases for managing data (e.g., dataloader, data import wizard).

- Describe the capabilities and implications of the data validation tools.

- Describe the different ways to back up data (e.g., weekly data export service, exports, dataloader). CONTENT AND FOLDER MANAGEMENT

- Describe the capabilities of Salesforce Content (e.g., presentation assembly, content delivery, content packs, workspaces, tags).

- Describe how folders can be used to organize and secure communication templates, dashboards, reports, and documents.

ANALYTICS, REPORTS AND DASHBOARDS

- Describe the options available when creating or customizing a report (e.g., report type, report format, fields, summarizing data, filtering data, charting, scheduling, and conditional highlighting).

- Describe the impact of the sharing model on reports.

- Describe the options available when creating and modifying dashboards (e.g., dashboard components, data sources, chart types, scheduling, and running user).

- Describe the capabilities of custom report types. Weighting 3 3%% Weighting 1% Weighting 11% Weighting 13% Weighting 2%

WORKFLOW AUTOMATION

- Describe when workflow are evaluated.

- Describe the capabilities of workflow rules and actions.

- Given a scenario, identify the appropriate workflow solution.

- Describe capabilities and use cases for the approval process.

DESKTOP AND MOBILE ADMINISTRATION

- Describe the capabilities of Salesforce Mobile.

- Describe the installation and synchronization options of Salesforce for Outlook.

APPEXCHANGE

- Identify use cases for AppExchange applications

SALESFORCE FUNDAMENTALS

- Describe the considerations when developing in a multi-tenant environment.
- Understand design frameworks, such as MVC architecture and Aura Framework, and how to build applications using both declarative and programmatic tools.
- Given a scenario, identify common use cases for declarative versus programmatic customizations.

DATA MODELING AND MANAGEMENT

- Given a set of requirements, determine, create, and access the appropriate data model including objects, fields, and relationships.
- Describe the capabilities of the various relationship types and custom IDs and the implications of each on record access and development.
- Describe the options for and considerations when importing and exporting data into development environments.
- Describe the capabilities and use cases for formula fields and roll-up summary fields.

PROCESS AUTOMATION AND LOGIC:

- Describe the capabilities of the declarative process automation features.
- Declare variables, constants, methods, and use modifiers and interfaces in Apex.
- Given a scenario, use and apply Apex control flow statements.
- Given a scenario, write Apex classes and use Apex interfaces.
- Given a scenario, write SOSL, SOQL, and DML statements in Apex.
- Given a use case, write Apex classes and triggers following best practices.
- Given a scenario, identify the implications of governor limits on Apex transactions.
- Describe the relationship between Apex transactions, the save order of execution, and the potential for recursion and/or cascading.
- Implement exception handling in Apex, including custom exceptions as needed.
- Use programmatic techniques to prevent security vulnerabilities.
- Given a scenario, use declarative functionality and Apex together to automate business logic.
- Given a scenario, identify the appropriate publish/subscribe logic for platform events.

USER INTERFACE:

- Given a scenario, display or modify Salesforce data using a Visualforce page and the appropriate controllers or extensions as needed.
- Describe the types of web content that can be incorporated into Visualforce pages.
- Incorporate Visualforce pages into Lightning Platform applications.
- Describe the Lightning Component framework and its benefits.
- Describe the types of content that can be contained in a Lightning web component.
- Given a scenario, prevent user interface and data access security vulnerabilities.

- Given a scenario, display and use a custom user interface components, including Lightning Components, Visual Flow, and Visualforce.
- Describe the use cases for Lightning component events and application events.
- Given a user interface requirement, describe interactions between Apex and various types of page components, including Lightning Components, Visual Flow, Next Best Actions, etc.

TESTING, DEBUGGING, AND DEPLOYMENT:

- Write and execute tests for triggers, controllers, classes, flows, and processes using various sources of test data.
- Describe the use cases for invoking anonymous code and the differences between invoking Apex in execute anonymous vs. unit tests.
- Describe the Salesforce Developer tools such as Salesforce DX, Salesforce CLI, and Developer Console, and when to use them.
- Describe how to approach debugging system issues and monitoring flows, processes, and asynchronous and batch jobs, etc.
- Describe the environments, requirements, and process for deploying code and associated configurations