# Course Structure - Admin Certification

## Lesson 1: Introduction, CRM & Salesforce.com Overview

1. Course Introduction
   - Overview and objectives of this course
   - Admin certification overview
   - Preparation from Day 1: Theory, Workshops, Notes, Flash Cards
2. CRM Overview
   - What is CRM?
   - CRM - Business & Technology
   - Modern CRM systems
3. Cloud Computing
   - Overview of cloud computing
   - SaaS, PaaS and IaaS
4. Introduction to Salesforce
   - Overview of Salesforce
   - Salesforce editions
   - Platform, horizontal and industry Solutions
   - High-level architecture
5. Workshop: SFDC Basics
   - Navigate SFDC ecosystem
   - Setup your sandbox

## Lesson 2: Platform Fundamentals

1. SFDC App
   - Overview
   - Components: Tabs, Detail Pages, Records & Related Lists
   - Chatter
2. Workshop: Navigate and Identify Salesforce Platform Enablers
   - Create your first Salesforce.com App
   - Identify configuration components
3. Demo-driven Lessons: AppExchange
   - Identify use cases and apps
   - Trial, Test-drive apps
   - Consultants
   - Components
4. Organization & Access Setup
   - Org setup: Company information
   - Personal Information & Access
   - User Management

- Data and access security: Roles, OWDs, Profiles, Permission Sets
- Standard and Special Considerations for Security
- Access restrictions

5. Workshop: Apps and Access to Views and Data

- Explore AppExchange
- Explore Tools for enabling application security
- View access
- Data access & granularity of Profiles & Permission sets

## Lesson 3: Salesforce Sales Cloud I

1. Sales Cloud Overview

- Account & Contact
- Opportunity
- Quote
- Lead
- Product & Price Book

2. Workshop: Explore Sales Cloud

3. Sales Functionality Deep-dive (with Demo)

- Customer flow within SFDC
- Accounts and Contacts
- Campaigns
- Lead assignment
- Lead conversion
- Business automation: Emails, Record types, Assignment rules, Auto-response rules

4. Workshop: Leads

- Create campaigns and leads
- Create email templates and send emails
- Explore lead conversion process

## Lesson 4: Sales Cloud II

1. Products and Pricebooks

- Overview and uptake

2. Workshop: Explore products and pricebooks

- Create Products
- Create standard pricelists and custom pricelists
- Validate how pricing is influenced

3. Opportunity Overview

- Opportunity attributes and products
- Opportunity stage

4. Quotes

- Quote templates
- Quote creation and distribution
- Pricing and currencies

- Approval flows

5. Workshop: Opportunities, Quotes

  - Currency admin
  - Opportunity creation and approval
  - Approval flows

## Lesson 5: Configure Custom Functionality

1. Workshop: Build Objects and Relationships

   - Create custom objects and establish relationships
   - Create UI
   - Data security
   - Record types revisited

2. Custom Objects

   - Overview & uptake
   - Standard & custom objects
   - Field types

3. Enable UI

   - Introduction to OOB UI, Visualforce, Lightning

## Lesson 6: Deep-dive Business Layer

1. Overview & Demo-driven lessons for Entity Relationships

   - Standard objects and custom objects
   - Relationships: Lookup, Master Detail, Indirect Lookup & External Lookup
   - Relationships: Many-to-Many, Hierarchical, Self

2. Workshop: Relationships

   - Implement all relationships
   - Explore & create ERDs

3. Business rules validation & automation: Validation rules, Workflow rules, Roll-up summary fields

4. Workshop: Explore Business Rules

## Lesson 7: Deep-dive UI Layer I

1. Demo-driven lessons: User Interfaces

   - Introduction to OOB UI - Classic & Lightning, Visualforce
   - Page Layouts
   - Detail and List Views
   - Hide and show related lists
   - Filters for parent and related lists

2. Business logic and automation in UI

   - Logic driven by Record Types

3. Workshop: User interfaces

## Lesson 8: Deep-dive UI Layer II

1. Demo-driven lessons: User Interfaces

   - Buttons, Quick actions
   - Introduction to advanced customization
   - Introduction to Salesforce mobile concepts
   - Reports: Type, Format, Filters, Conditional Highlighting
   - Reports: Summary
   - Dashboards: Sources, Charts, Schedule
2. Workshop: Reports and Dashboards

## Lesson 9: Service Cloud

1. Service cloud

   - Overview and uptake
   - Case management
2. Solution management

3. Knowledge management

4. Demo-driven Lessons: Explore Service app

5. Workshop: Explore Service app

6. Business Rule Validation and Automation

   - Email to case, web to case
   - Assignment rules
   - Auto-response rules
   - Escalation rules
7. Workshop: Explore validation and automation rules

## Lesson 10: Data Management

1. Data Export

2. Data Import

   - Inserts, Updates and Deletes
3. Process for Bulk Data Operations

   - Mass data change impact assessment
   - Testing
4. Brief Introduction to Third-party Tools for Integration and Data Management

5. Workshop: Explore Bulk Data Operations

## Lesson 11: TRUST: Security Revisited I

1. Profiles, Permission Sets, OWD

2. UI Security

   - App and view access
3. Data Security

   - Roles

- Permissions
- Audit trail

4. Sharing rules

- Objects
- Files
- Reports & Dashboards
- Apex
- Visualforce

5. Transaction Security

6. Workshop: Visibility and Sharing I

## Lesson 12: TRUST: Security Revisited II

1. Demo-driven Lessons: Application security

- Login policies & restrictions
- Password policies & changes
- Session management
- Certificates
- Remote settings

2. Application Monitoring

- Setup Audit Trail
- Debug logs and email logs
- Schedule jobs
- Batch data load jobs

3. Demo-driven Lessons: Admin Privileges & Tasks

- Delegation
- Deployment: Change sets
- Desktop and mobile admin: Mobile app, Outlook
- Introduction to developer tools and ecosystem

4. Workshop: Visibility and Sharing II

- Explore application security
- Create change sets and explore deployment

## Lesson 13: Collaboration on Salesforce

1. Chatter Overview

2. Demo-driven Lessons: Chatter

- Enable Chatter
- Chatter groups
- Setup feeds
- Share data on Chatter
- Chatter emails

3. Workshop: Explore Chatter

4. Communities

- Overview

- Branding & user preferences
- Community management
- User management
- Topic management

5. Ideas

6. Content Library

7. Workshop: Collaboration

- Community Cloud & Management
- Ideas
- Content library
- Communities

## Lesson 14: Rest of the Ecosystem

1. Salesforce Support

- Help and Training
- Support - Salesforce, AppExchange Partners
- Issues and Ideas
- TRUST site

2. Other applications of interest

- Marketing cloud
- Heroku
- Quip
- Mulesoft

3. Q&A

4. Exam Prep and Next Steps

- Mindset
- Study of scenarios & questions
- Multiple choice questions

## Lesson 15:

1. Workshop: Admin Certification Exam Samples
2. Introduce Case Studies
3. Q & A

## Lesson 16 - 20:

1. Case Studies
2. Practice exams
3. Q & A