Salesforce Administration Fundamentals Training

Duration: **5 Day**

BILGINC IT Academy
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The Salesforce Administration Fundamentals training is a comprehensive course designed for beginners who want to learn the role of a Salesforce Administrator. Over five days, participants gain hands-on experience configuring and customizing a Salesforce organization (org).

The course covers Salesforce architecture, user management, security settings, and system configuration. It also focuses on customization, automation, data management, and reporting, enabling learners to perform day-to-day administrative tasks effectively.

Prerequisites

Participants should have:

- Knowledge equivalent to the Trailhead course “Essentials for New Lightning Experience Administrators”
- Basic familiarity with Salesforce

Who Should Attend

This course is ideal for:

- Beginner Salesforce administrators
- Aspiring Salesforce System Administrators
- Trailblazers looking to expand their skills

What You Will Learn

By the end of this course, learners will be able to:

- Understand Salesforce fundamentals and user interface navigation
- Configure licensing, users, and security settings
- Apply security models using profiles and permission sets
- Customize objects, fields, and layouts
- Use automation tools to streamline business processes
- Manage data and create reports and dashboards

Training Outline

Module 1: Salesforce Basics

- What is Salesforce
- Key terminology
- User interface

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- Setup introduction
- Getting help

Module 2: Business Settings

- Company information
- Licensing
- Default settings
- Currency management
- Fiscal year
- Business hours
- User management
- Login history and audit

Module 3: Security

- Security overview
- Login controls
- Profiles
- Permission sets
- Field-level security

Module 4: Record Access

- Record ownership
- Organization-wide defaults
- Role hierarchy
- Sharing rules
- Manual and team sharing
- Restriction rules

Module 5: Object and Field Customization

- Customization approaches
- Standard and custom fields
- Picklists
- Relationships
- Formula fields

Module 6: UI Customization

- Apps
- Home page
- List views
- Page layouts
- Lightning App Builder
- Dynamic Forms and Actions
- Record types

Module 7: Custom Objects

- Creating custom objects
- Tabs

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- Migration approaches

Module 8: Data Management

- Backup
- Import/export
- Bulk operations
- Field history tracking

Module 9: Automation

- Automation tools
- Validation rules
- Lead and case automation
- Assignment rules
- Auto-response rules
- Web-to-lead and web-to-case

Module 10: Introduction to Flow

- Flow overview
- Flow types
- Record-triggered flows
- Screen flows
- Decision logic

Module 11: Reports and Dashboards

- Report folders
- Report formats
- Filters and grouping
- Summary formulas
- Charts and formatting
- Dashboards