

Course Name

Salesforce Administrator Pro: AI-Powered CRM Administration & Automation

Course Overview (40 Hours)

Module 1: Salesforce Platform Foundations

- Introduction to Salesforce Ecosystem
- CRM Concepts & Cloud Overview
- Salesforce Editions & Licenses
- Lightning Experience Navigation
- Company Information & Org Setup
- Trailhead & Learning Resources

Module 2: User & Security Management

- User Management
- Profiles
- Permission Sets & Permission Set Groups
- Roles & Role Hierarchy
- Organization-Wide Defaults (OWD)
- Sharing Rules
- Manual Sharing & Teams
- Login Access Policies
- Session Settings
- Multi-Factor Authentication (MFA)

Module 3: Data Model & Object Management

- Standard Objects
- Custom Objects
- Fields & Field Types
- Page Layouts
- Dynamic Forms
- Record Types
- Business Processes
- Compact Layouts
- Schema Builder
- External IDs

Module 4: Data Management

- Data Import Wizard
- Data Loader
- Data Export
- Duplicate Management
- Matching Rules

- Validation Rules
- Formula Fields
- Roll-Up Summary Fields
- Data Quality Best Practices

Module 5: Business Process Automation

- Workflow Rules (Legacy Overview)
- Process Builder (Migration Strategy)
- Record-Triggered Flows
- Screen Flows
- Scheduled Flows
- Autolaunched Flows
- Approval Processes
- Email Alerts
- Flow Error Handling
- Flow Debugging

Module 6: AI-Powered Salesforce Administration

- Introduction to Salesforce AI
- Einstein Features for Admins
- Prompt Builder
- Agentforce Basics
- AI-Powered Productivity
- AI Security & Trust Layer
- AI Use Cases for Sales & Service
- Responsible AI Best Practices

Module 7: Sales Cloud Administration

- Lead Management
- Account & Contact Management
- Opportunity Management
- Products & Price Books
- Quotes Basics
- Forecasting Overview
- Sales Path
- Pipeline Management

Module 8: Service Cloud Administration

- Case Management
- Queues
- Assignment Rules
- Escalation Rules
- Auto-Response Rules
- Email-to-Case
- Knowledge Basics

- Service Console Overview

Module 9: Reports & Dashboards

- Report Types
- Custom Reports
- Row-Level Formulas
- Bucket Fields
- Joined Reports
- Dashboard Components
- Dynamic Dashboards
- Report & Dashboard Subscriptions

Module 10: Productivity & Collaboration

- Chatter
- Global Actions
- Quick Actions
- Email Templates
- List Views
- Kanban Views
- Calendar Integration
- Activity Timeline

Module 11: App Customization

- Lightning App Builder
- Dynamic Actions
- Tabs
- Apps
- Home Page Customization
- Record Pages
- Utility Bar
- Branding & Themes

Module 12: Deployment & Release Management

- Sandboxes
- Change Sets
- DevOps Center Overview
- Salesforce Releases
- Release Readiness
- Setup Audit Trail
- Optimizer
- Health Check

Module 13: Integration Fundamentals

- Connected Apps

- AppExchange
- Outlook & Gmail Integration
- Web-to-Lead
- Web-to-Case
- Import & Export Integrations
- API Basics for Admins

Module 14: Monitoring & Maintenance

- Debug Logs Overview
- Login History
- Field History Tracking
- Storage Management
- Scheduled Jobs
- Backup Strategies
- Performance Optimization
- Governance Best Practices

Module 15: Certification & Real-World Projects

- Salesforce Certified Administrator Exam Blueprint
- Scenario-Based Administration
- Business Requirement Analysis
- Mini CRM Implementation Project
- Mock Exam Practice
- Interview Preparation
- Resume & LinkedIn Optimization
- Admin Career Roadmap

This syllabus aligns with the modern Salesforce Administrator role by emphasizing **Flow automation (instead of legacy Workflow/Process Builder), Dynamic Forms, AI features, Salesforce Optimizer, and current security best practices**, making it suitable for learners preparing for today's Salesforce Admin roles and certification.