

# Semester Plan and Overview of Independent Study Objectives

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Per the discussion on Monday I will plan on submitting an intermediate report every two weeks (beginning on 05-24-2019) and submitting a final consolidated report along with a conclusion on 07-19-2019. This semester plan can be thought of as a proposed syllabus for my semester. For the next several weeks along with the bi-weekly reports I will be completing projects within the Salesforce CRM platform that involve programming aspects via the developer console (utilizing Apex, a variant of Java, and SQL variants). These projects and accompanying screenshots will be included in the reports.

**05-17-2019** *Semester plan and overview of independent study objectives*

**05-24-2019** *CRM Basics:*

- Introduction to CRM
- Data Modelling and Quality
- User Management
- User Authentication and Permissions
- Account Reports and Dashboards

**06-07-2019** *CRM App Customization. Use concepts from CRM Basics to:*

- Build an App with:
  - Object Models
  - Custom User Experience
  - Business Logic
  - Reports and Dashboards
- Discuss:
  - Record types
  - Schema
  - Approval Process
  - Reports

**06-21-2019** *CRM Customization and Automation. Use developer console to:*

- Automate record creation
- Synchronize data with external system via REST
- Schedule synchronization
- Test automation and synchronization

**07-05-2019** *CRM Analytics and Discovery:*

- Translate requirements into a dashboard view
- Configure dashboard JSON file
- Use SQL to access and format dataset
- Perform dataset calculations
- Run analytics tool, review and improve results

**07-19-2019** *Consolidated final report and conclusion*