SMARTBRIDGE
Let's Bridge the Gap

salesforce PARTNER

VIRTUAL INTERNSHIP PROGRAM - 2022

An initiative to help Young Minds of India build their Careers in Salesforce Ecosystem

Salesforce Administrator - Handbook

SmartBridge Educational Services Pvt. Ltd.

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Introduction

Salesforce is the world's #1 **CRM (**Customer Relationship Management) where it unites Marketing, Sales, Commerce, IT etc teams to their customers to deliver a better service.

We are determined to teach this emerging Technology in a very realistic and fun way. We have organized the challenges in such a way that the learner will be able to learn salesforce in a very enthusiastic and fun way with a limited time participation.

This program consists of live sessions, Hands-on practical activities, Mentoring support and working on super badges on Trailhead platform.

In order to help all beginners understand the salesforce ecosystem and its products, we have curated a few best modules on the trailhead platform that will help you to get ready for the Bootcamp.

Suggested Prerequisites

This section is to provide the candidates a quick look at the salesforce environment. Though this section is not mandatory, we highly recommend the candidates to go through the below mentioned modules. You will be very well acquainted with the platform and also with the usage of Trailhead from the very beginning. (Recommended for beginners).

- Salesforce user basics
  https://trailhead.salesforce.com/content/learn/modules/lex_salesforce_basics?trailmix_creator_id=vmehta12&trailmix_slug=what-is-salesforce

- Salesforce quick look
  https://trailhead.salesforce.com/modules?sort=QUICKEST&levels=beginner&products=general&products=lightningex&products=appcloud&roles=admin

- Salesforce CRM
  ttps://trailhead.salesforce.com/content/learn/modules/lex_implementation_basics?trailmix_creator_id=vmehta12&trailmix_slug=what-is-salesforce

- Salesforce Platform For Business Users
  https://trailhead.salesforce.com/content/learn/modules/company_wide_org_settings

- Salesforce User Tour
  https://trailhead.salesforce.com/content/learn/modules/lex_salesforce_tour?trailmix_creator_id=jgeddes&trailmix_slug=what-is-salesforce

- Salesforce Licensing
  https://trailhead.salesforce.com/content/learn/modules/salesforce-licensing?trailmix_creator_id=jgeddes&trailmix_slug=what-is-salesforce

- Lightning Experience Basics
  https://trailhead.salesforce.com/content/learn/modules/lex_migration_introduction?trailmix_creator_id=jgeddes&trailmix_slug=what-is-salesforce

- Salesforce Customer 360: Quick Look
  https://trailhead.salesforce.com/en/content/learn/modules/salesforce-customer-360-quick-look?trail_id=salesforce_advantage

- The fourth Industrial Revolution: Quick look
  https://trailhead.salesforce.com/en/content/learn/modules/the-fourth-industrial-revolution-quick-look?trail_id=salesforce_advantage

- Salesforce Admin career Path
  https://trailhead.salesforce.com/career-path/admin

- Trailhead and Trailblazer Community
  https://trailhead.salesforce.com/en/content/learn/trails/learn_salesforce_with_trailhead?trailmix_creator_id=strailhead&trailmix_slug=get-started-with-trailhead-end-user

Bootcamp (Starts cohort wise)

Bootcamp will be organized for 3 weeks where 2 Live Sessions will be conducted per week with 3 Hours per session. Learners need to complete the self paced courses on Trailhead platform parallely along with the bootcamps. The Day wise content and references to complete trailhead modules are given below.

Week-1	(2 days Live Sessions + 5 days self paced learning)	
Day – 1 : Live Session 1 Content		
		• Introduction to Salesforce • What is Salesforce CRM? • Setup a free developer account in Salesforce? • Architecture of Salesforce • Creating a FREE Salesforce Org • Navigating the Salesforce User Interface • Lightning vs Classic Salesforce Interface • Salesforce Branding and UI Customization • Density Settings • User Navigation Bar Customization • Salesforce Themes and Branding • Company Profile • User Management • Organizational & User Setup
Day – 2 & 3 : Self-Paced Learning to be Completed		

Complete the given trailhead modules before the next live session.

Module	Trailhead module link	Duration
Salesforce Platform Basics	https://trailhead.salesforce.com/content/learn/modules/starting_force_com?trail_id=force_com_admin_beginner	3 Hrs
Organizational Setup	https://trailhead.salesforce.com/content/learn/modules/company_wide_org_settings	3 Hrs

Day – 4 : Live Session - 2 Content Modules to be completed

- Object Relationships
- Introduction to Sales Cloud
- Sales Cloud
- Leads Home Page
- Creating List Views
- Creating and Converting Leads
- Creating Accounts
- Creating Contacts
- Creating Email Templates
- Sending Individual Emails
- Sending Mass Emails
- Creating and Managing Price Books
- Creating Products
- Creating Opportunities
- Creating Activities
- Creating a Web-to-Lead Form
- Creating a Lead Assignment Rule
- Creating a Lead Queue
- Creating an Auto-Response Rule
- Creating Campaigns
- Record Types

Day – 5, 6 & 7 : Self-Paced Learning Modules to be completed

Module	Trailhead module link	Duration
Data Modeling	https://trailhead.salesforce.com/en/content/learn/modules/data_modeling?trail_id=force_com_admin_beginner	3 Hrs
Sales Cloud Basics	https://trailhead.salesforce.com/content/learn/modules/sales-cloud-platform-quick-look?trail_id=go-digital-fast-with-the-salesforce-customer-360	3 Hrs

Week-2	(2 days Live Sessions + 5 days self paced learning)

Day – 8 : Live Session - 3 Content

- Introduction to Service Cloud
- Service Cloud
- Creating Cases
- Creating Case Assignment Rules
- Creating Case Escalation Rules
- Enabling Solutions
- Creating Solutions
- Attaching Solutions to Cases
- Enabling Knowledge
- Configuring Knowledge
- Creating a Web-to-Case Form
- Creating an Email-to-Case Address
- Process automation overview
- Workflow Rules & Actions
- Validation Rules
- Approval Processes
- Process Builder Overview
- Creating a Process Builder Process
- Process Builder Actions
- Process Builder in Practice

Day – 9 & 10 : Self-Paced Learning Modules to be completed

Module	Learning Link	Duration
Service Cloud Basics	https://trailhead.salesforce.com/content/learn/modules/service-cloud-platform-quick-look?trail_id=go-digital-fast-with-the-salesforce-customer-360	3 Hrs
Process Automation	https://trailhead.salesforce.com/en/content/learn/modules/business_process_automation?trail_id=force_com_admin_intermediate	3 Hrs

Day – 11 : Live Session - 4 Content

- Introduction To Flow Builder
- Introduction To Flows
- Types Of Flows
  - a) Screen Flow
  - b) Auto launched Flow
  - c) Record Triggered Flow
  - d) Platform Event -Triggered Flow
  - e) Schedule-Triggered Flow
- Introduction to Chatter

		● Chatter Overview	
		● Enabling Chatter	
		● Enabling Chatter Feeds on Records	
		● Configuring Chatter Groups	
		● Creating Customer Groups	
		● Creating a Free Customer Chatter User	
		● Customizing Chatter Email Notifications	

Day – 12, 13 & 14 : Self-Paced Learning Modules to be completed

Module	Learning Link	Duration
Flows	https://trailhead.salesforce.com/en/content/learn/modules/flow-basics	3 Hrs
Flow Builder	https://trailhead.salesforce.com/en/content/learn/modules/flow-builder	3 Hrs

Week-3	(2 days Live Sessions + 5 days self paced learning)

Day – 15 : Live Session - 5 Content

	● Salesforce Security Overview
	● Organizational Security Settings
	● Organizational Wide Defaults
	● Record Ownership
	● Role Hierarchies
	● Sharing rules
	● Manual Sharing
	● Object Permissions and Record Access
	● User Profiles & Permissions
	● Salesforce Security Section Questions
	● Tabular Reports
	● Report Automation
	● Summary Reports
	● Matrix Reports
	● Report Charts & Formatting
	● Bucket Fields
	● Report Types
	● Report Type Layouts
	● Report Types Lab
	● Reports & Page Layouts
	● Dashboards
	● Report & Dashboard Security
	● Chatter & Dashboards

Day – 16, 17 : Self-Paced Learning Module to be completed

Module	Learning Link	Duration
Data Security	https://trailhead.salesforce.com/en/contenarn/modules/data_security?trail_id=force_com_admin_intermediate	3 Hrs
Superbadge Program Security: Quick Look	https://trailhead.salesforce.com/en/content/learn/modules/superbadge-cred-security-quick-look	2 Hrs
Credential Security	https://trailhead.salesforce.com/en/content/learn/modules/credential-security	2 Hrs
User Authentication Settings Superbadge Unit	https://trailhead.salesforce.com/en/content/learn/superbadges/superbadge-user-authentication-settings	2 Hrs
User Authentication	https://trailhead.salesforce.com/en/content/learn/modules/identity_login	2 Hrs
Multi-Factor Authentication and Single Sign-On Settings Superbadge Unit	https://trailhead.salesforce.com/en/content/learn/superbadges/superbadge-mfa-sso-settings	2 Hrs
User Authentication Troubleshooting Superbadge Unit	https://trailhead.salesforce.com/en/content/learn/superbadges/superbadge-user-authentication-troubleshooting	2 Hrs
User Authentication Specialist Superbadge	https://trailhead.salesforce.com/en/content/learn/superbadges/superbadge-user-authentication	2 Hrs
Reports & Dashboards	https://trailhead.salesforce.com/content/learn/modules/lex_implementation_reports_dashboards	2 Hrs

Day – 18 : Live Session 6 Content

- Duplicate Management
- Methods for Importing & Exporting Data
- Salesforce IDs and External IDs
- Data Loader
- Import Wizard
- Considerations when importing data
- Data Management Best Practice
- Backing up Salesforce Data
- Mass Action Functions
- Salesforce Content
- Document Folder & File Uploading Review

		● Data Management Section Questions

Day – 19, 20 : Self-Paced Learning Module to be completed

Module	Learning Link	Duration
Data Management Tools	https://trailhead.salesforce.com/en/content/learn/modules/lex_implementation_data_management?trail_id=force_com_admin_beginner	3 Hrs
Data Loader	https://trailhead.salesforce.com/en/content/learn/modules/lex_implementation_data_management?trail_id=force_com_admin_beginner	3 Hrs

Project / SuperBadges

The learner's journey is structured in such a way that , after completion of the live sessions and all trailhead courses modules, the SuperBadges are unlocked automatically. The Learner who chooses admin as his learning path, needs to complete the following SuperBadges.

Icon	SuperBadge Name	Trailhead Link
	Business Administration Specialist	https://trailhead.salesforce.com/en/content/learn/superbadges/superbadge_business_specialist
	Lightning Experience Reports and Dashboards Specialist	https://trailhead.salesforce.com/en/content/learn/superbadges/superbadge-lex-rd
	Security Specialist	https://trailhead.salesforce.com/en/content/learn/superbadges/superbadge_security

The learner will be given 20-25 days of time for completion of the above SuperBadges.

Ask a Mentor Sessions
After assigning the projects/Superbadges for the learners, if they face any challenge in completion of the activities or modules, we organize expert mentoring sessions to address the queries learners have. 2 mentoring sessions will be organized per week.

Submissions
Each learner's journey and completion status is tracked through SmartInternz platform. learners will be asked to update the status of their work regularly to track their progress and assist accordingly.

Verification
We will verify the progress of each learner on the SmartInternz platform. It is mandatory for all the learners to complete the above prescribed course modules and super badges to fulfill.

Soft Skills Training
After the successful submission of the project/super badge, the Learners will be provided with 10 Hrs of soft skills training sessions to help learners with Interview skills, Profile building and presentation skills etc. This will benefit them during career fairs.

Certificate Generation

After successful verification of the project/super badges along with the prescribed completions on trailhead, Virtual Internship Completion Certificate will be generated on SmartInternz.

Career Fair
After successful completion of the program, the final year learners who will qualify for the eligibility of career fair will be allowed to join the career fair organized on the regular intervals for career connection opportunities.

FAQs
1. Do we need any prior coding knowledge?
A. For admin, the Learners don't need any coding knowledge but for development, the Learner should have the basic java programming skills.

2. How could this course help us?
A. This course helps in gaining knowledge about salesforce from scratch and the final year Learners enrolled in this course have an opportunity to participate in a career fair.

3. What is a career fair?
A. career fair is a type of informational or recruitment/outreach event that connects recruiters and candidates in a virtual space. Attendees can learn about various organizations or sponsors and career opportunities from the comfort of their own home, with all of the ease afforded by a virtual platform.

4. What is the Course duration?
A. The course duration is for 60 days.

5. What is the minimum educational qualification?
A. All the graduation Learners irrespective of their current year can participate in this event.

6. Is salesforce related to sales or marketing jobs?
A. No, salesforce is a technology driven platform.

7. What are the ways to explore salesforce?
A. The best learning resources present in the market to learn salesforce is "Trailhead".

8. Do we have access to the recorded sessions?
A. Yes, we provide the access for the recorded sessions.

9. Is it mandatory to maintain attendance?
A. The Learner needs to maintain a 75% attendance.

10. Can the Learner register in two paths(admin, development)?
A. No, the Learner needs to choose only one path for this program.