

A young child with brown hair and eyes is the central figure. They are wearing a bright yellow, chunky-knit beanie and a dark green, quilted jacket. Their hands are raised to their eyes, with fingers spread, as if they are peeking or covering them. They are also wearing a red and white patterned sweater underneath the jacket. The background is a blurred blue, possibly a sky or a wall.

# Software Cloud Computing

isobar

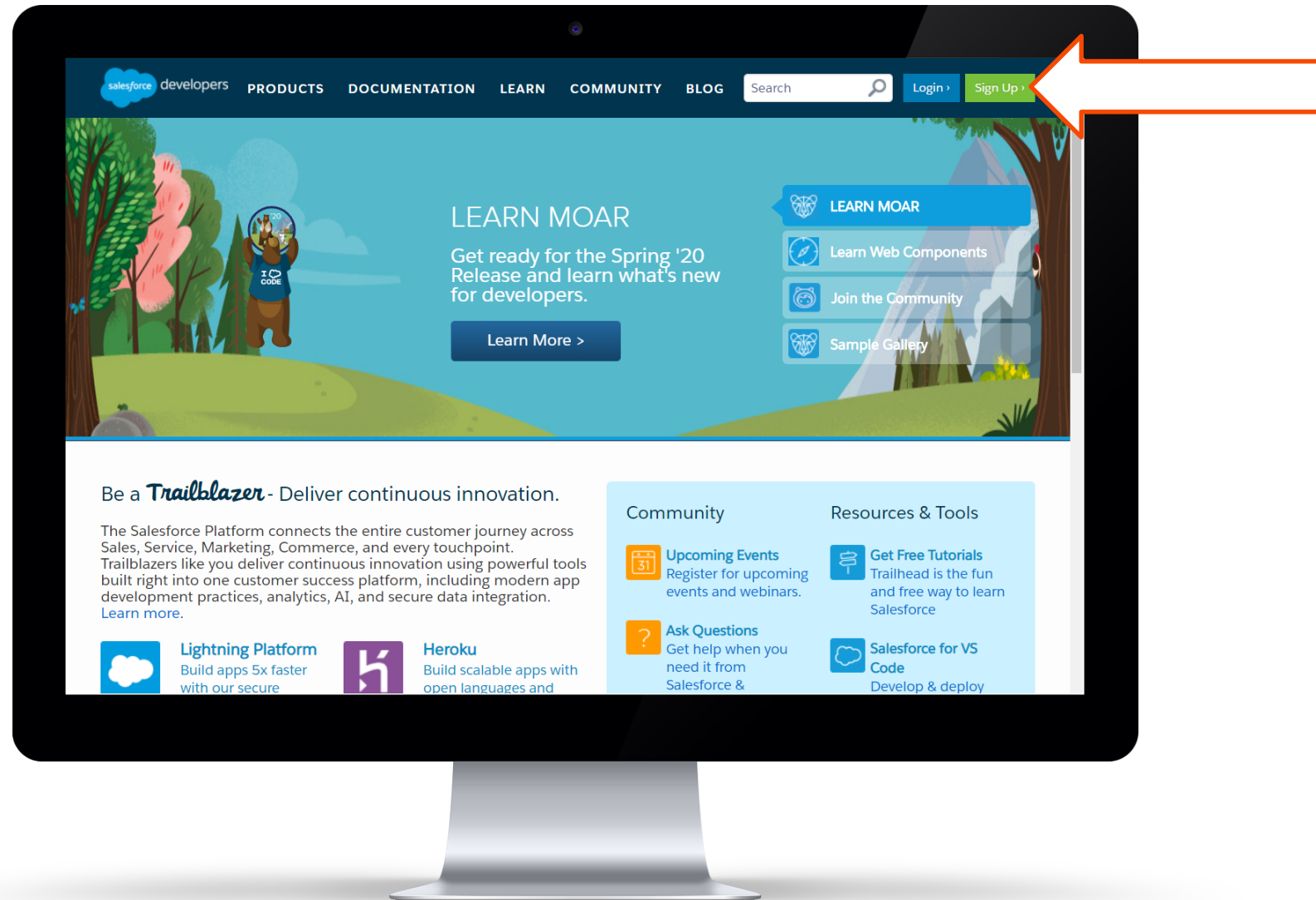
# — Index

## Week #1 – Lesson #2

- Creating your first Developer Org
- Registering on Trailhead

## Exercise

- Salesforce Lightning Components
- AppExchange
- Lightning App Builder





**MAKE SURE  
YOU'RE NOT  
IN A TRIAL**

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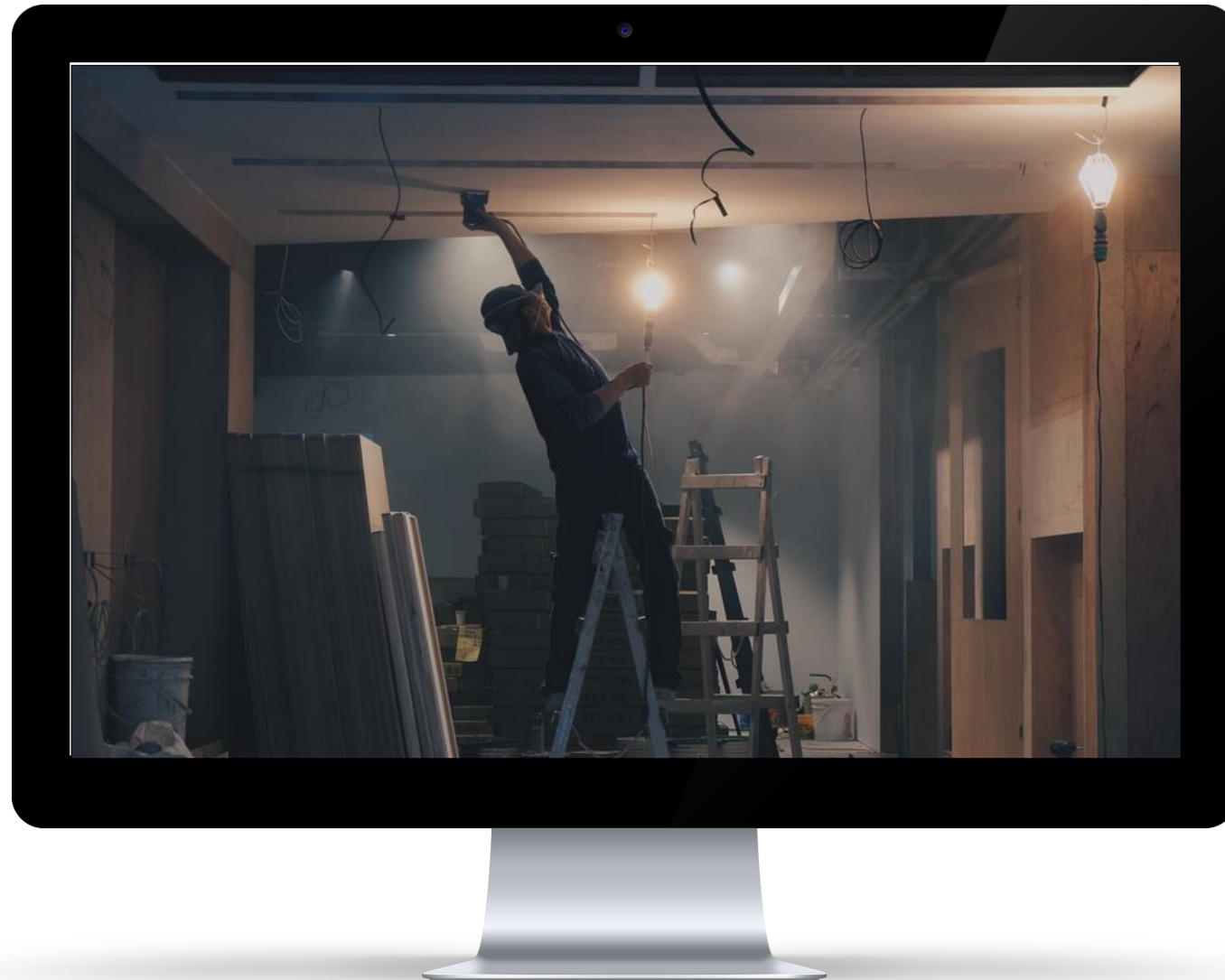
Sign me up >

Suggestion: Use a personal / academic email that you will use for a long time – ipg, gmail, protonmail, outlook.

Suggestion: use either your academic email, or your personal email **with a suffix**:

e.g. johnDoe\_personal@gmail.com





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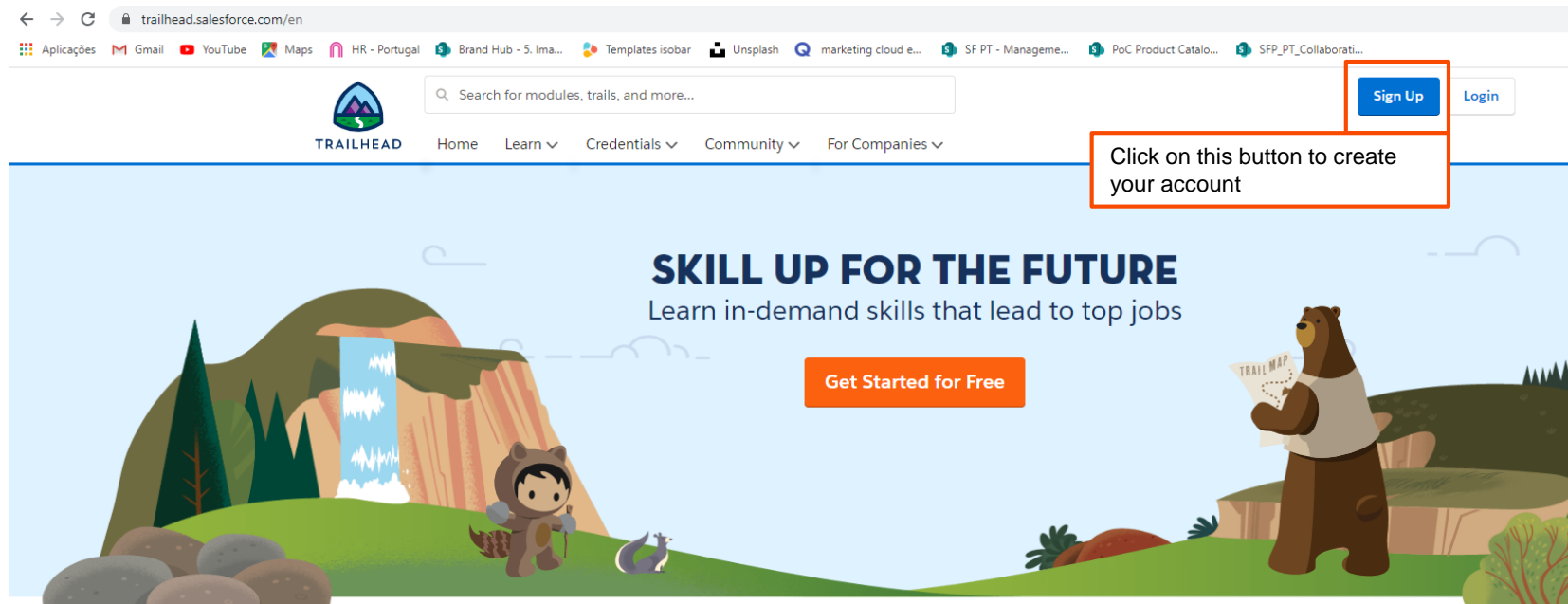
# Trailhead

## What is that?

- Trailhead is the go-to website for learning Salesforce
- Here you will find a fun way to learn Salesforce, by quizzes, projects, and super badges that will leverage your knowledge and apply features for real examples.
- Follow the next slides to see how to set-up your Dev org.

# How to set-up your Dev Org

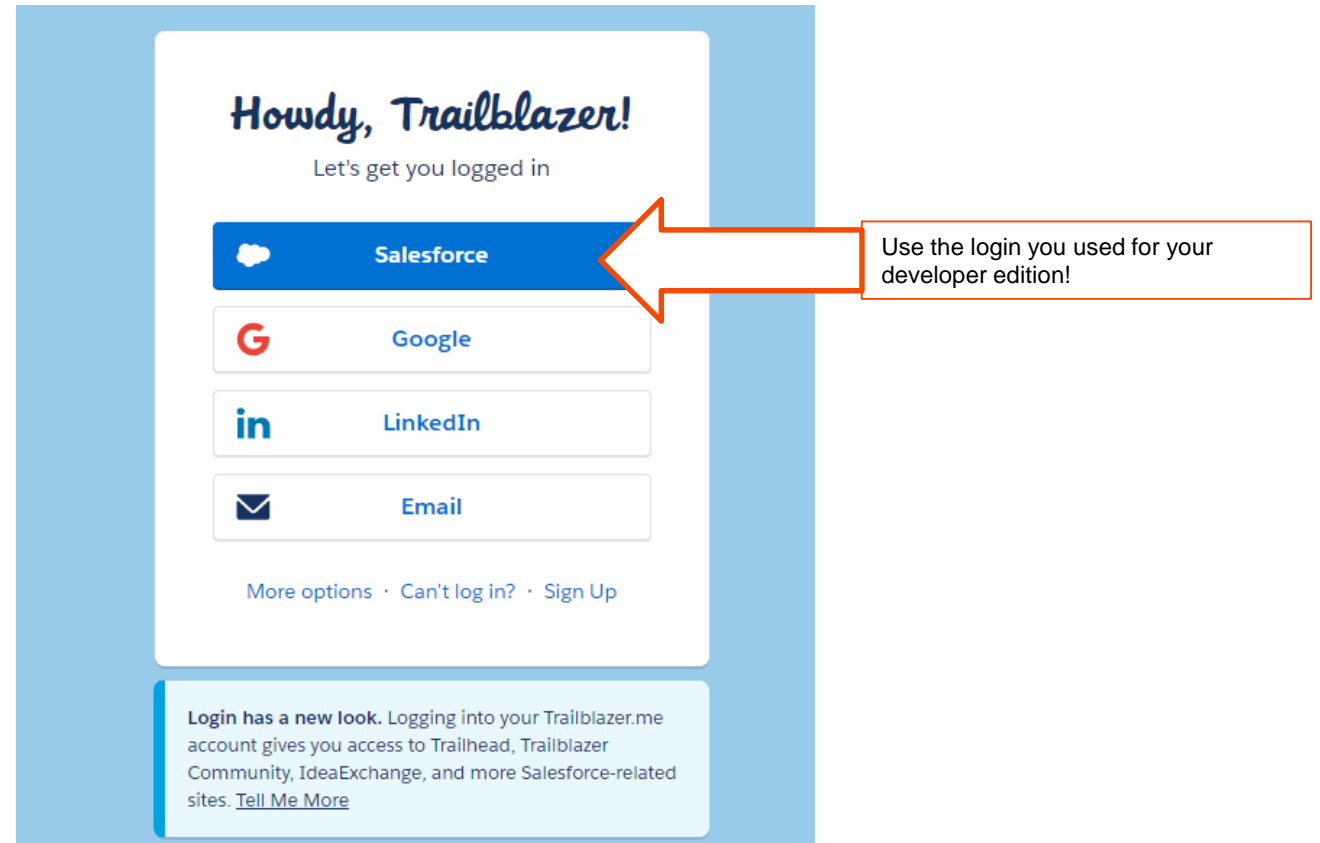
- First, navigate to: <https://trailhead.salesforce.com/en>



# How to set-up your Dev Org

- Select one of the options below and follow the steps.

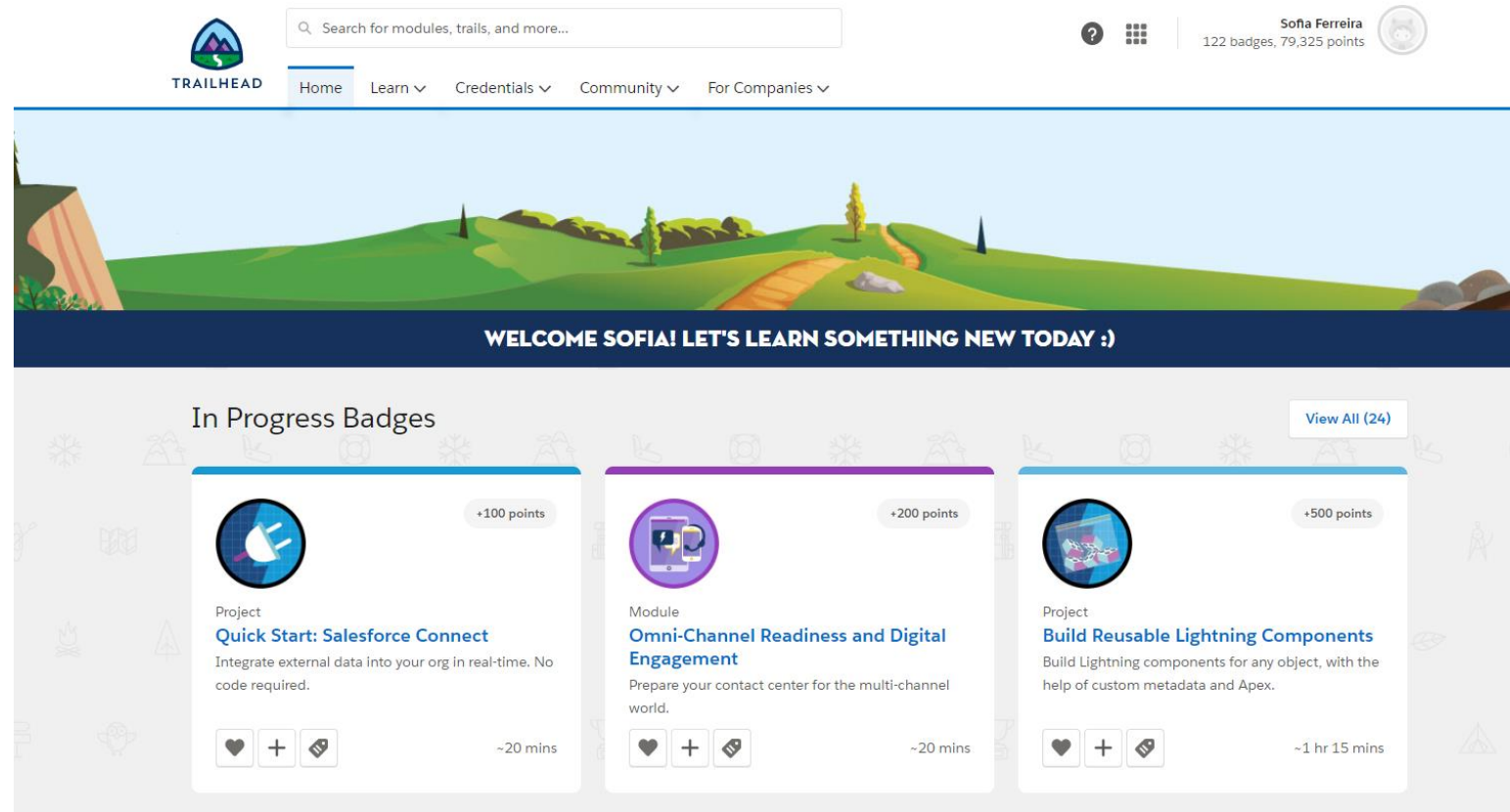
Happy trails 😊





# Get started with your trail

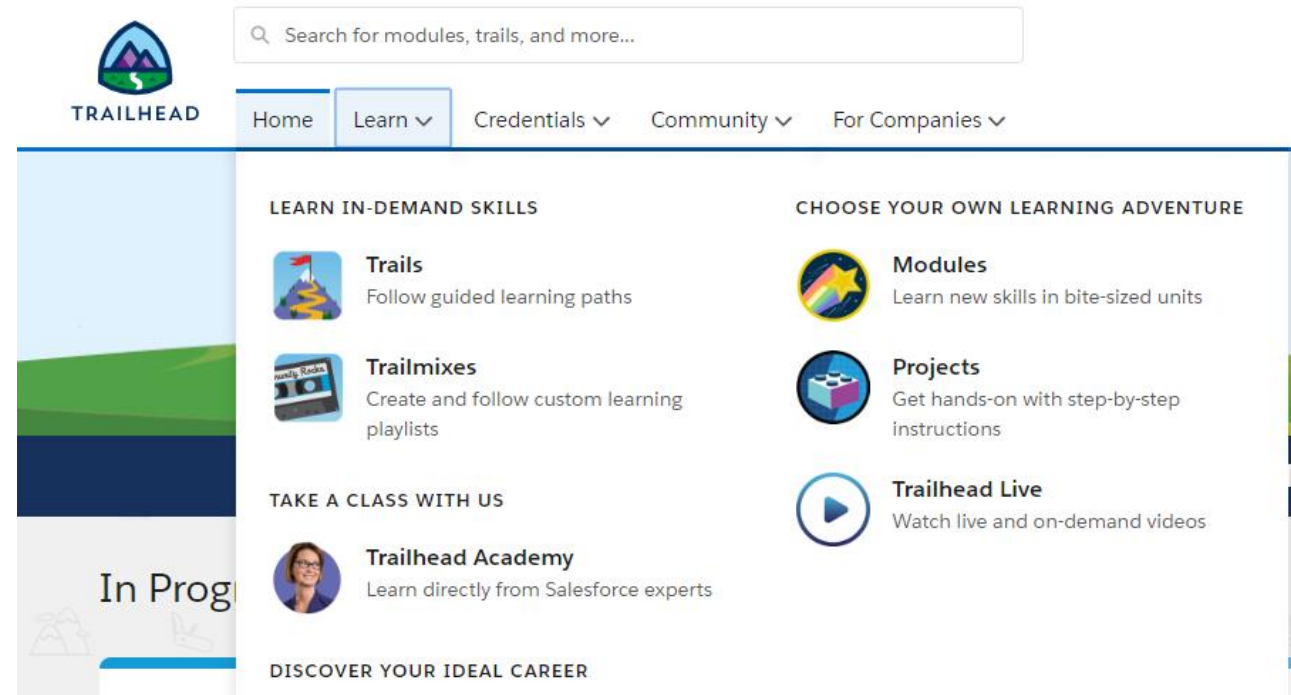
- After everything is configured, this is the homepage of your trailhead.



# Basic Features

On the tab Learn, you can see your materials to train and learn salesforce:

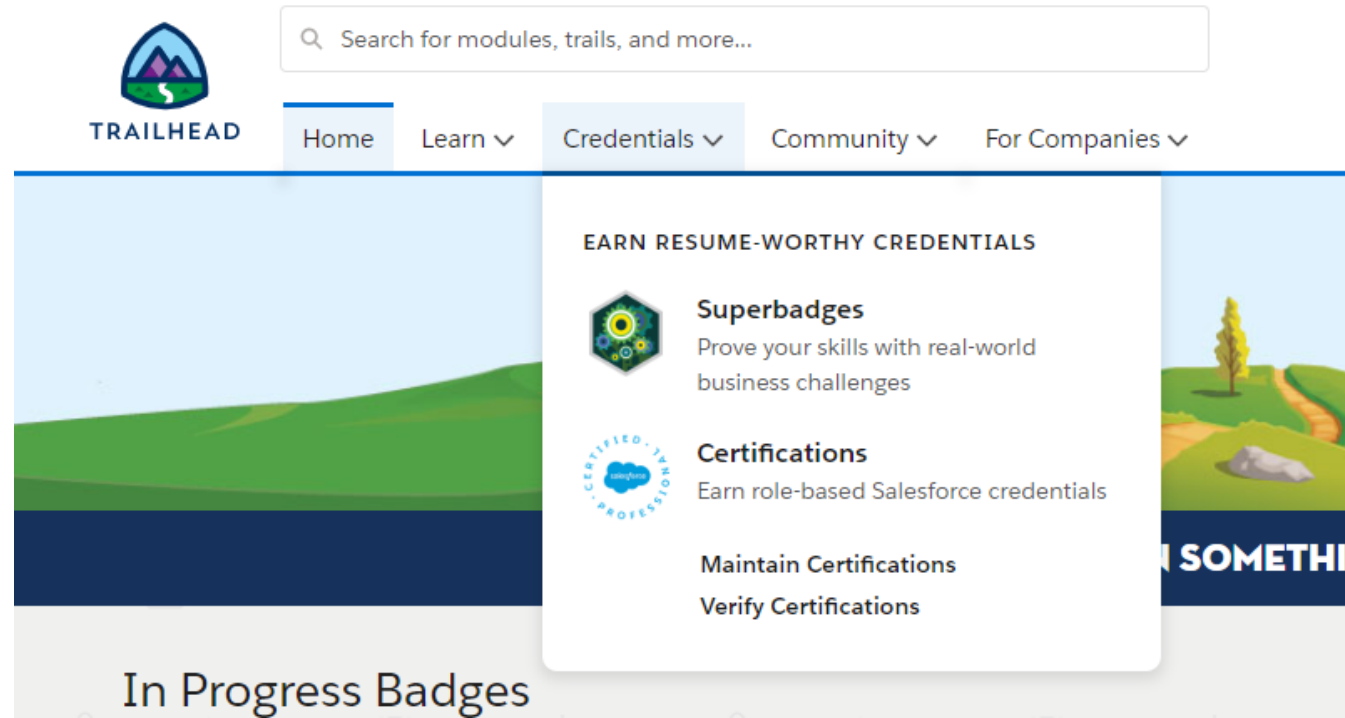
- Modules – are pieces of content that explain a specific subject
- Trail - a collection of modules that train a certain skill
- Projects – are hands-on exercises where you can put in action that you learn on the trails and modules



# Basic Features

On the tab Credentials, is where certifications information and superbadges are:

- Superbadges – Use-Case materials where you can practice in a more real-world challenges. A true Business Case
- Certifications - In here, you can see what kind of certifications exists for each type of career path



# Let's begin Trail

When navigating to trails, you will find a full list of trails that are available to you:

- Find the right trails for you – Use these filters to find the right trails for you. In your case will be Developer, beginner

### Trails: follow guided learning paths

Trails are guided learning paths through modules and projects that help you cover the most ground in the shortest amount of time. Consider them your personal game plan for exploring new skills.

Find the right trails for you [Clear filters](#)

Your role

Admin

Business User

Developer

Your level

Beginner

Intermediate

Advanced

Products

Commerce Cloud

Community Cloud

Education Cloud

MuleSoft

Nonprofit Cloud

Pardot

Tags (16)

Apex

App Lifecycle


App Logic

Heroku

Industries

Integration

Showing 26 trails out of 177






+1,600 points


Trail

**Optimize Data, Audiences, and Digital Advertising**

Learn how advertising solutions can help you discover new customers, reach the right audiences,



~2 hrs 40 mins






+22,025 points


Trail

**Developer Beginner**

Leverage your existing development skills to build apps fast on the Salesforce Platform.



49%






+2,400 points

Trail

**Build Your Practice as a Consulting Partner**

Learn how your firm can make the most of a partnership with Salesforce.



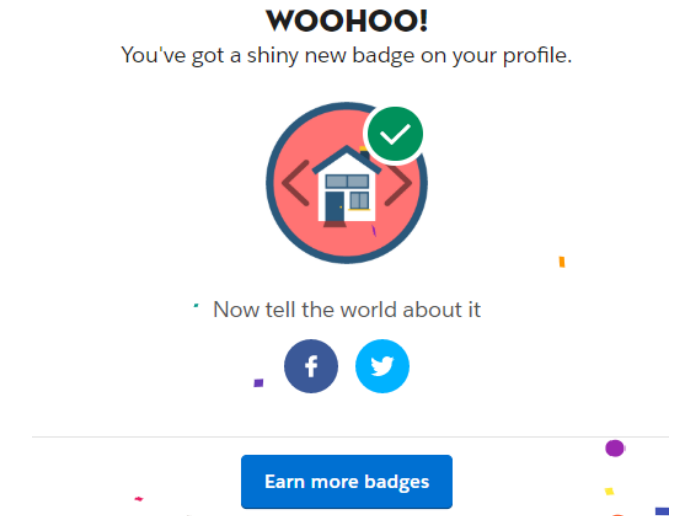
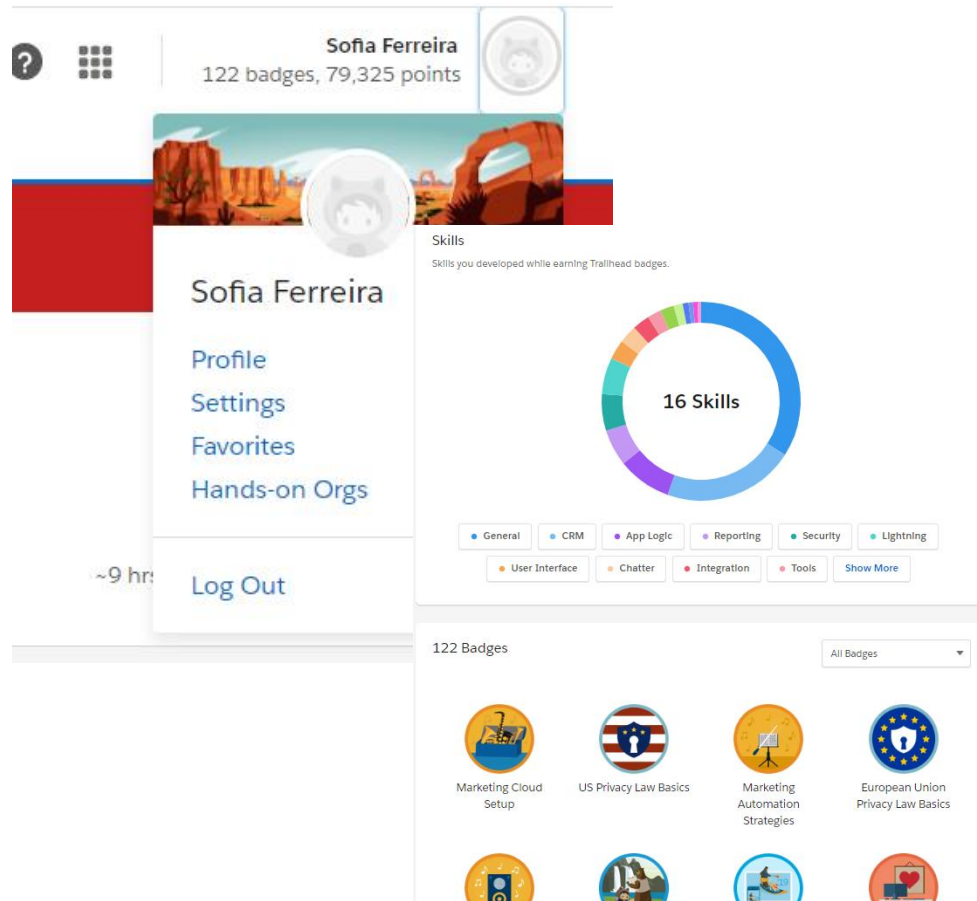
25%

isobar

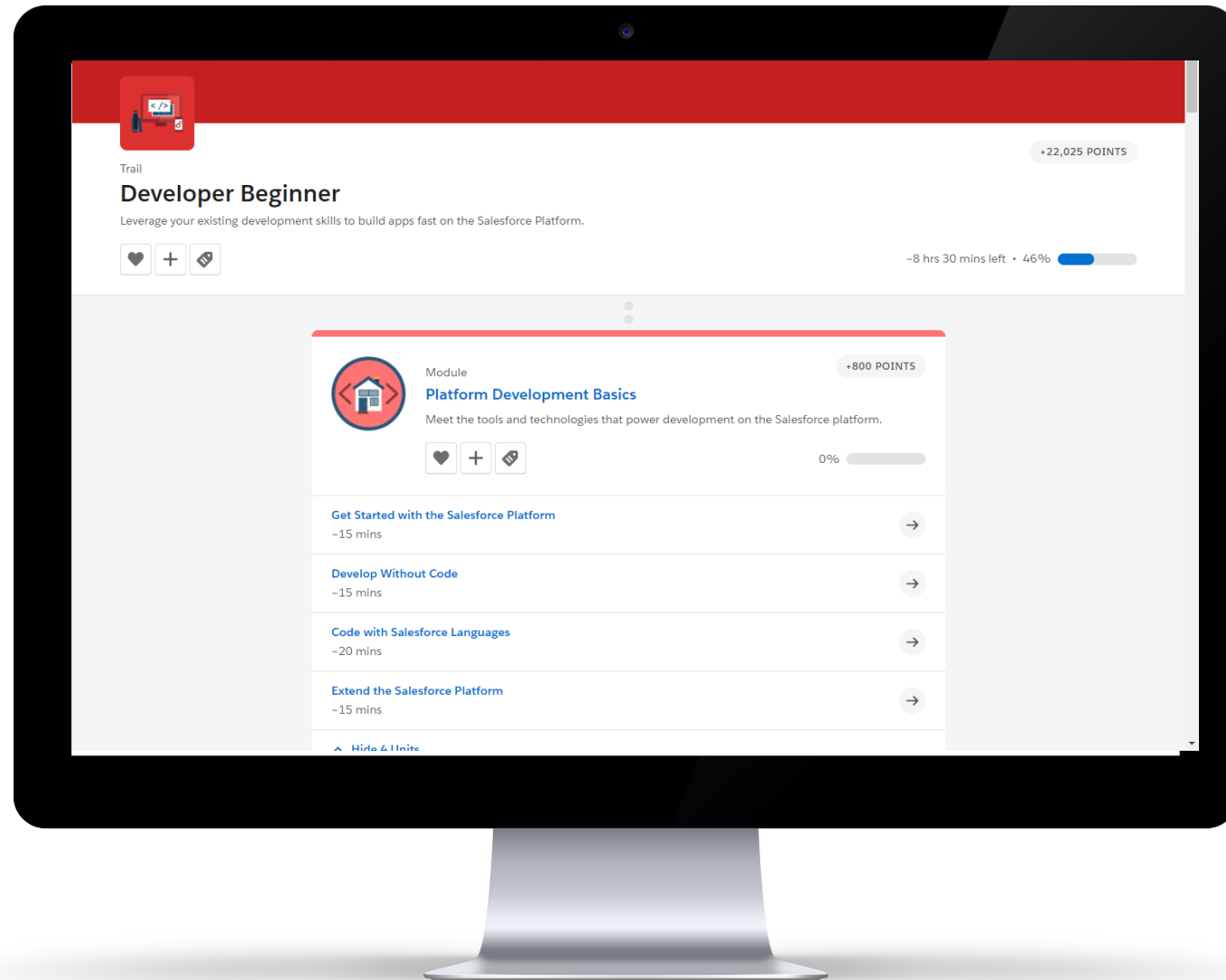
12

# Let's begin Badges

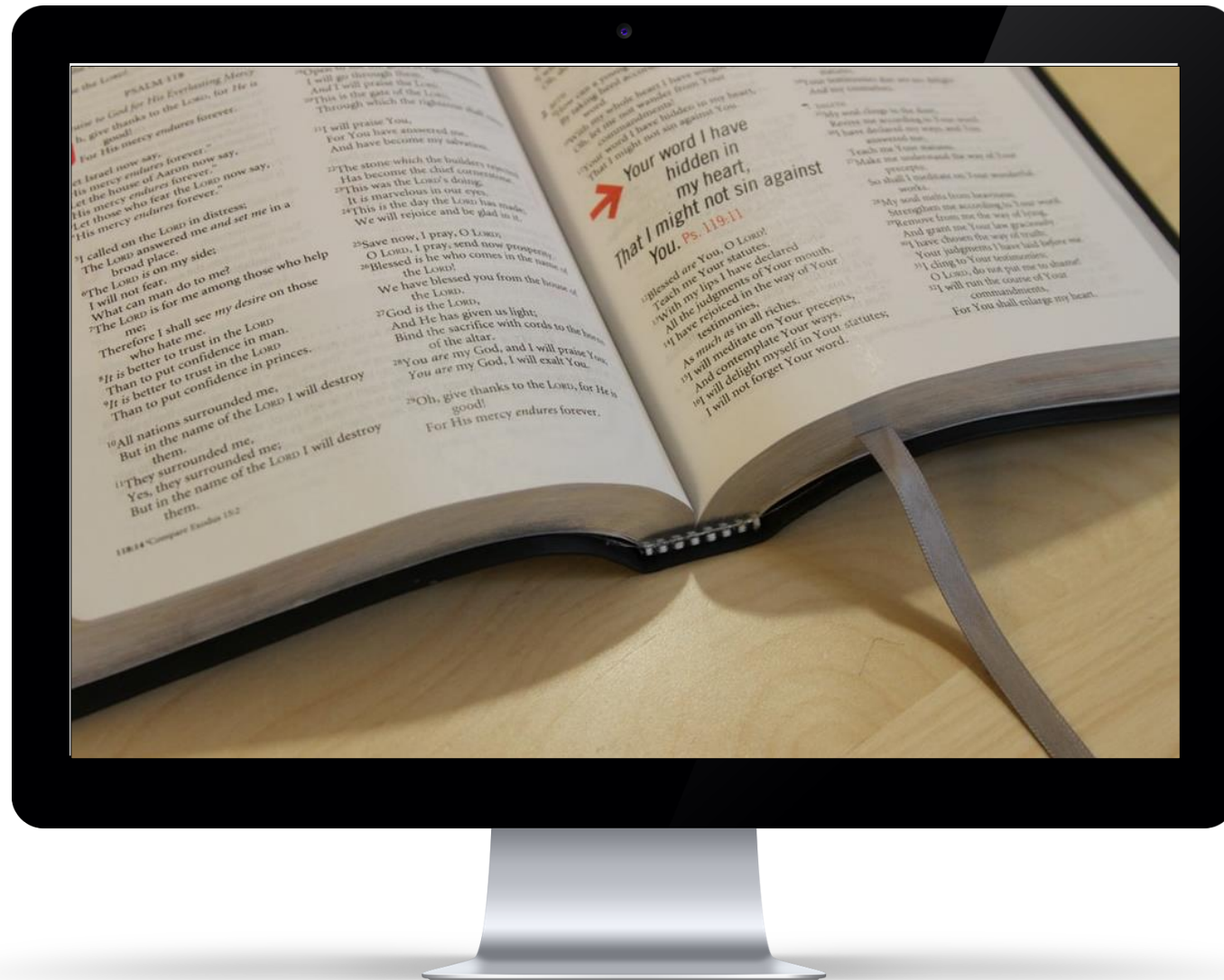
- For each module finished, you will earn a new badge and gain a new skill in your profile.



- To check all of your badges and skills go to profile to view them







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# Topics and Keywords to Remember

## Salesforce Apps & Global User Interface

Salesforce is a huge pool of information. The following pages include a 101 primer on topics and keywords that will be essential to understanding how everything connects.

- **Standard** = “Out of the Box” – developer by Salesforce
- **Custom** – Developed by you / not salesforce
- **Objects** = “Tables” / “Programming” Objects
- **Lightning** = Recent Salesforce User Interface
- **Classic** = “Old School” Salesforce User Interface.

# — Topics and Keywords to Remember Organization

- **Organization** - An org is a unique version of Salesforce for a specific tenant, containing their data and configuration (a customer's implementation of Salesforce). Org is an abbreviation for organization. Org, organization, and environment are used interchangeably. Every org will have a unique ID (found under Company Information in setup).
- A pod is a cluster of infrastructure (servers, software, networking equipment, etc.) that hosts many orgs. The terms pod and instance are commonly used interchangeably. Each pod is located within a geographical area (North America, Europe, Asia Pacific).
- **Sandbox** - A sandbox is a copy of a production environment, commonly used for testing and development. Sandbox and production environments use different login URLs:
  - Production Environments: <https://login.salesforce.com>
  - Sandbox Environments: <https://test.salesforce.com>

For this course we will use personal developer orgs that work like production

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## Topics and Keywords to Remember

### User Setup

- **User Record** - An **active user record** is required to login to Salesforce. Active users count against licensing limits, while inactive users do not. **Records can only be assigned to an active user.**

**Record Ownership** - **Records in Salesforce will have an owner** (or will inherit the properties of ownership from a parent record, discussed later). Records can be owned by either users or queues.

By default, the user that creates the record is the owner. Record ownership is used to determine responsibilities (e.g. **I manage the leads that I own through a list view**), **reporting** (e.g. **I am credited for the opportunities that I own**), record security (discussed in Security and Access), and for a variety of other purposes.

- **Profile** - Each user is assigned one profile, which determines a user's functional access (apps, tabs, object and field permissions), how information is displayed to the user (page layouts, record types, etc.), and a wide range of other permissions.

# — Topics and Keywords to Remember

## Objects

- An **object** can be thought as a table or entity in standard database terms.
- It is the container for all the information on a certain person, place or thing you want to store data on.
- E.g. Consider a school – it can track its students, teachers and classes. So it would create a table or object in Salesforce, for students, teachers and classes.
- **Fields** are the structures inside the object 'container' which store the specific attributes or information of the object.

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# Topics and Keywords to Remember

## Apps

- A **Salesforce APP** can be thought as a container with a name, a logo, and an ordered set of tabs (access to information and features). E.g. An Expense tracking App of XYZ Org.
- All the **metadata** such as Objects, Visualforce Pages, Components, Classes, are independent of an app. It groups everything together.
- Internally the metadata has nothing to do with an app, meaning multiple apps can REUSE tabs, VF Pages, components, objects.



# — Topics and Keywords to Remember

## Global User Interface

- **List views** are designed to quickly segment, and then take action on records. Reports are used to summarize record data for analysis.
- In Salesforce Classic layout determines which **components** are shown. **Layouts are assigned based on the user's profile**. An administrator may want to create multiple home page layouts to present different information (components) to different users. **Standard components** can be configured and **custom components** can be created.
- In Lightning Experience, **pages are built using Lightning App Builder** and are **assigned via profile** (if no assignment exists, the default page is selected).
- The home tab experience is configured separately for each user interface; there virtually no overlap between home page configuration in Salesforce Classic and Lightning Experience.



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## References

Salesforce Trailhead Modules:

- [Lightning App Builder](#)
- [CRM for Lightning Experience](#)