

# Salesforce Certification Training: Admin 201 and App Builder

Course Curriculum: Your 20 module Learning Plan

https://www.edureka.co/salesforce-administrator-and-developer-training

# About Edureka

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# **About Course**

Salesforce Admin Certification Training by Edureka is curated by industry professionals and will help you prepare for the Salesforce Administrator Exam (ADM 201) and the Platform App Builder (CRT 403) Exam. In this Salesforce certification training, you will learn how to customize your application including page layouts, fields, tabs, and business processes, create a secure Salesforce environment, maintain and import clean data, create high-value reports and dashboards, and set up workflow automation.

# Salesforce Admin Certification Curriculum

# Introduction to Cloud Computing and Salesforce Platform

#### Goal:

Get to know about Cloud computing concepts, SAAS, PAAS, IAAS – Service model, Public, Private, Community and Hybrid Cloud models.

#### Objectives:

Upon completing this module, you should be able to:

- Explain Cloud Computing
- Define SAAS, PAAS, IAAS Service Model
- Explain Public, Private and Hybrid Cloud Deployments
- Compare CRM and PAAS Market
- Comprehend basics of SFDC / Salesforce1
- List the benefits of Force.com/ Salesforce1 Platform
- Explain Multi-tenant (single-tenant) Architecture
- Explain Metadata driven architecture

# Topics:

- What is Cloud Computing
- Service and Deployment models in the Cloud
- Market situation
- Cloud Ownership
- Introduction to SF1 and Force.com Platform
- Declarative & Programmatic Options in Force.com
- Meta-data Driven Architecture
- Multi-tenant Architecture

- Business and IT benefits
- Use of SF1

#### Hands-On:

• Create Salesforce Account

# Building Blocks of Salesforce Platform

#### Goal:

In this module you will be working on building a custom app on Salesforce platform.

## Objectives:

Upon completing this module, you should be able to:

- Illustrate working of Salesforce Platform
- Explain Company Profile and License Types
- Define User licenses available in the Developer Org
- Define System Overview
- List types of Sandbox
- Explain MVC Model
- Implement Page Layout, Search Layouts, Object Limits
- Explain the App, which we will build during this course
- Build a custom app on Force.com Platform

## Topics:

- Sign-up for a Free Environment / Org
- Adding company logo

- Benefits of System overview
- Salesforce Key Building Blocks
- Editions and Different Environments Available
- MVC Pattern
- Student App
- Student App Master Basic Data Model
- Student Master and Marks/Grades
- Student Master Basic Security Model
- Student Master Reports
- Student Master Application Scope

#### Hands-On:

• Build a Custom Student App

# Salesforce Data model, Objects, Relationships and Fields

#### Goal:

This module presents to you the understanding of Standard and Custom Objects, Standard and Custom Fields and Datatypes, various Relationships, Lookup Filters, schema builder and explain the implications of deleting fields.

# Objectives:

- Understand concept of Objects and its uses
- Create Custom App and Custom Objects
- Leverage various Standard and Custom Fields
- Identify various Datatypes and Field Types

- Analyze different type of relationships (Master- Detail and lookup)
- Identify role of Search Layouts

#### Topics:

- Custom Objects and understand various properties in the Object definition section
- Standard objects
- Field and Data Types
- Custom Field Properties
- Field Dependencies
- Types of Relationship Fields
- Search Layouts

#### Hands-On:

- Create Custom Objects
- Customize standard objects
- Create custom fields
- Use Search layout

# Salesforce Security Model and its Features

#### Goal:

Understand different levels - Org-level, Object level, Record level, Org-level - Profile and Permission sets Login hours, network level and Object Level - Profile and Permission sets

## Objectives:

- Explain System Org Level Security
- Modify Permission Sets and Password Policy

- Create IP Address Security and Login Hours
- Identify Session, Activation, Page layout, Tab settings
- Implement Field Level Security
- Integrate Public Groups, Queue and Profiles

## Topics:

- Security Model Mind Map
- System Level or Org Level Security
- User Administration and Troubleshooting
- Permission Sets
- Profile and Permissions Sets
- Password Policy
- IP Address security
- Login hours
- Session settings
- Activations
- Page layout assignment
- Tab setting
- Field level security

- Create Permission Set
- Create Profile
- Apply field level security
- Secure page layouts

# Salesforce Security Model Object, Record and Field Level features

#### Goal:

In this module, you will learn about organization wide defaults, Role and Role Hierarchy, Criteria based sharing, Manual Sharing and Apex sharing reasons.

## Objectives:

Upon completing this module, you should be able to:

- Analyse Security Features of Record and Object Level
- Modify and Implement Organization Wide Defaults (OWD)
- Classify Role and Role Hierarchy
- Identify features of Criteria Sharing
- Understand need of Public Groups and Queue

## Topics:

- Security Model Mind Map
- Record Level and Object Level
- Organization wide defaults
- Organization wide defaults Student App
- Role and Role Hierarchy
- Criteria Based Sharing
- Different ways to gain Record Level Access
- Public Group
- Queue
- Public group Vs Queue

- Create roles and role hierarchy
- Secure Salesforce platform as per the requirements

# Business Logic, Formulas & Validations

#### Goal:

Learn to work on custom and standard objects; Enforcing Data quality, Integrity and Validation rules.

## Objectives:

Upon completing this module, you should be able to:

- Analyze features of Business Logic
- Ways to Implement Business logic
- Create and Identify need of formula fields
- Enforce Data quality and Integrity
- Identify uses of Validation rules
- Understand Roll-up summary and Page layouts

## Topics:

- Business Logic Mind Map
- Different Options to Implement Business Logic
- Functions
- Formula
- Validation Rules
- Rollup Summary Fields
- Record Types and Page Layouts

- Implement business logic
- Create validation rules
- Create Formula Fiedls and Rollup Summary Fields

# Business Process Automation in Salesforce

#### Goal:

This module will help you in learning Capabilities and use cases for the approval process and introduce you to the Lightning Process builder.

# Objectives:

Upon completing this module, you should be able to:

- Implement Workflow Rules
- Evaluate features of Workflow Rules
- Identify capabilities of Workflow Rules and Actions
- Define the appropriate Workflow Solution
- Implement the Approval Process
- Deduce various use cases for Approval Process

#### Topics:

- Business Process Automation
- Business Requirements Workflow Rules
- Workflow Actions (Time When Action Takes Place)
- Workflow Actions
- Workflow Considerations
- Approvals Introduction
- Approvals How to Create A Process
- Approvals Actions
- Approvals How and What Can Approvers Do

- Create a workflow process
- Implement workflow rules and actions

# Customer Management using Salesforce Sales Cloud

#### Goal:

This module will explain the different sales processes in any organization, Sales Productivity Features, Lead management, products and price books, campaign management.

# Objectives:

Upon completing this module, you should be able to:

- Understand Sales processes in any organization
- Identify various Sales Productivity Features
- Design and Implement Lead Management
- Analyse Process of Campaign Management
- Define Characteristics of Products and Price books

## Topics:

- Sales Cloud
- Sales Process
- Sales Productivity Features
- Lead Management
- Lead auto response
- Lead assignment
- · Web to lead
- Accounts and Contacts Management
- Opportunities
- Campaign Management
- Price Book, Products, Price Book Entries

#### Hands-On:

Capture and Manage Leads

- Assign leads
- Work with Salesforce Sales Cloud

# Customer Service Solution using Salesforce Service Cloud

#### Goal:

Learn capabilities of case management, given a scenario, identify how to automate case management. Capabilities of solution management, the basic capabilities of customer access across all channels, integration with legacy data systems, pre-built integration apps, support ticketing, knowledge base, routing and escalation, and queue management.

## Objectives:

Upon completing this module, you should be able to:

- Analyze case management
- Implement automation in case management
- Identify the capabilities of solution management
- Understand the basic capabilities of Communities
- Categorize the capabilities of the Community application, such as Ideas and Answers
- Identify the capabilities of Salesforce Knowledge

# Topics:

- Service Cloud
- Case Management
- Typical Service and Support Process
- Automation Web2Case and Auto-Response
- Automation Email2Case
- Automation Assignment Rules
- Automation Escalation Rules

- Email Templates in Case Management
- Channels
- Case Resolution Solutions
- Case Resolution Using Knowledge
- Communities Basics
- Communities Setup and Administration
- Communities Ideas and Answers

#### Hands-On:

- Work with Salesforce Service Cloud
- Automate Case Management
- Capture cases from website and email
- Customize case process, Solutions, Communities and Salesforce Knowledge

# Data Handling and Processing in Salesforce

## Goal:

This module introduces you to the concept of identifying tools and use cases for managing data, capabilities and implications of the data validation tools and the different ways to back up data

## Objectives:

- Identify the considerations for Data Processing
- Analyze tools and use cases for managing data
- Utilize the capabilities of the data validation tools
- Resolve implications of the data validation tools
- Implement the different ways to back up data

## Topics:

- Data Handling and Processing Overview
- Exporting data and Regular Backup
- External ID and Unique Fields
- Import Data
- Apex Data loader
- Import Wizard and Data Loader and compare the features, Update, Upsert operations, Delete and Hard Delete records,
- Transfer record ownership

#### Hands-On:

- Handle and Processing Data
- Import Clean Data
- Export data and Regular Backup
- Install Apex Data loader
- Use the Import Wizard and Data Loader

# Reports and Dashboards in Salesforce

#### Goal:

Create or customize a report, know the impact of the sharing model on reports, and options available when creating and modifying dashboards

## Objectives:

- Create a report
- Customize a report
- Identify the impacts of Sharing Model on Reports

- Create and Modify dashboards
- Analyze the capabilities of Custom Report Types

## Topics:

- Report with and without modifications
- Tabular report, summary and matrix report
- Report and Security
- Report Builder and Standard Reports Available
- Custom report type and store in a folder
- User filters in reports
- Dashboard
- Bucket field
- Tabular Report significance
- Summary report significance
- Matrix report significance
- Joined report significance
- Dynamic dashboard

#### Hands-On:

- Create various Salesforce report such as tabular report, summary and matrix report
- Add a chart and few other features like highlighting
- Create a custom report type and store in a folder
- Filter users in a report
- Create dynamic dashboard

Salesforce 1, Lightning App Builder, Salesforce A, Outlook

Goal:

Learn about the capabilities of Salesforce1 and Salesforce and the installation and synchronization options of Salesforce for Outlook

## Objectives:

Upon completing this module, you should be able to:

- Identify components of Salesforce1 mobile
- Analyze features of Salesforce A
- Integrate Salesforce with Microsoft Outlook

## Topics:

- Customizable parts of the SF1 app
- Security and customizable settings
- Navigation menu
- Compact layouts and Mobile cards
- Basic admin activities on Salesforce A
- Outlook and SF synch up

#### Hands-On:

- Customize Salesforce1 app
- Customize security settings
- Navigate through Salesforce menu
- Create Compact layouts and Mobile cards
- Perform basic admin activities on Salesforce A
- Integrate Salesforce with Microsoft Outlook

Activity Management, AppExchange, Content and Folder Management

Goal:

In this module, you should learn use cases for AppExchange applications, and describe the capabilities of Salesforce Content, and activity management.

## Objectives:

Upon completing this module, you should be able to:

- Identify components of Activity management, Folder Management and AppExchange
- Create and Track Tasks
- Integrate various templates form to salesforce App

## Topics:

- Activity management Tasks, Events and Open activities
- Tasks and events
- Folders and Document templates
- AppExchange

#### Hands-On:

- Manage Salesforce activities
- Create and track tasks and events
- Create folders and Document templates

# Chatter, Global Action and Publisher Layout

#### Goal:

In this module you will know about the Global action and publisher layouts and the features of Chatter.

#### Objectives:

Upon completing this module, you should be able to:

• Identify Features of Chatter

- Understand Global Publisher Layout and Global actions
- Implement Object specific actions

## Topics:

- Chatter groups, feeds, people
- Files, Follow records, people
- Groups Topics and Files
- Global action types-Create
- Log a call, Custom VF page
- Custom canvas, Publisher layout
- Global an Object specific actions

#### Hands-On:

- Create Chatter groups, feeds, people
- Create custom VF page
- Create Custom canvas, Publisher layout

# Salesforce Mobile

#### Goal:

In this module, you will learn about the Salesforce mobile apps.

## Objectives:

- Use Salesforce1
- Use SalesforceA
- Differentiate between Salesforce1 and SalesforceA

# Topics:

- Salesforce1
- SalesforceA
- Salesforce1 Vs SalesforceA

#### Hands-On:

• Work with Salesforce1 and SalesforceA

# Deployment Process in Salesforce

#### Goal:

In this module, you will learn deployment process in Salesforce environment.

## Objectives:

Upon completing this module, you should be able to:

- Know steps in deployment
- Learn types of change sets
- Understand deployment settings

## Topics:

- Outbound Change Sets
- Inbound Change Sets
- Deployment Settings

- Work with Change Sets
- Implement deployment steps

# Salesforce Project Application Lifecycle

#### Goal:

Get an overview of application cycle of a Salesforce project.

## Objectives:

Upon completing this module, you should be able to:

- Know milestones in Application lifecycle
- Working on sandbox
- Know benefits of unmanaged packages

# Topics:

- Milestones
- Sandboxes
- Change Sets
- Packages

## Hands-On:

- Work with Sandboxes
- Create change sets and packages

# Lightning in Salesforce

## Goal:

In this module, you will be introduced to Salesforce lightning.

# Objectives:

- Know benefits of lightning components
- Learn difference between classic and lightning experience

## Topics:

- Lightning Components
- Lightning Component Capabilities
- Lightning Components vs. Visualforce

#### Hands-On:

• Work on lightning experience

# Buttons and Link management in Salesforce

#### Goal:

In this module Learn how to create custom buttons and links.

## Objectives:

Upon completing this module, you should be able to:

- Learn adding custom buttons
- Working on custom links
- Know benefits of Actions

## Topics:

- Custom Buttons
- Custom Links
- Records with Actions
- Global Action
- Object Specific Action

#### Hands-On:

• Create custom button and links

# Salesforce App Exchange

Goal:

Learn information about AppExchange

Objectives:

Upon completing this module, you should be able to:

- Know benefits of AppExchange
- Downloading apps
- Finding apps as per need

# Topics:

- AppExchange Overview
- Finding and Selecting an App
- Installing an App
- Finding a Developer
- Finding a Consultant

## Hands-On:

• Use AppExhange and work with ready to install apps

# **Projects**

What are the system requirements for our Salesforce Certification Training?

Participants are expected to have a PC with minimum 2GB RAM and a latest browser and internet connection. Windows or Mac is recommended Basic Adobe reader and Office tools or Google Docs will be handy.

# How will I execute the practicals?

For executing the practicals, participants will be enabled to create a life-time free SFDC development environment on the Cloud. There are few simple tools that need to installed for specific topics which comprise around 10% of the total course and will be provided in that module.

Which case studies will be a part of this Salesforce Certification Course?

#### **Scenario 1: Service System Project**

A Canada based company which works in Mobile domain, is in the need of an application which can help it to boost the service. To make the things very effective, they will use Salesforce application. They want to track the information about the customer, their types of issues and as per that they want to speed up the process to give them quick solution.

# **Goal of this project**

Company wants to capture all the information about the customers who are facing some issue in the mobile device. From the type of issue, they want to automate the assignment of the issue ownership to the concern person. Apart from that company wants to escalate the issue to the higher authority when any delay happens.

#### **Scenario 2: Placement Company Application**

A Japan based placement company wants to use Salesforce for end to end process of its business process, in Salesforce. Management has decided to track the all positions posted by recruiters and candidates. Also, they want to track the information about the Candidates, capturing details as well as work preference. Then they want to put some business rules in process which will be adding automation in this business process to make an effective system.

## **Goal of this project**

Company wants to capture the details of the candidates in the Salesforce database. Depending on the preferred country location, it wants to assign the Candidate to related recruitment officer related to that region.