SALESFORCE ADMINISTRATOR

An Internship report submitted in partial fulfillment of the requirements for the award

of the Degree of

BACHELOR OF TECHNOLOGY

In

COMPUTER SCIENCE AND ENGINEERING

Presented By

S S K KARTHIKEYA   **216K1A05B0**

DEPARTMENT OF COMPUTER SCIENCE AND ENGINEERING

IDEAL INSTITUTE OF TECHNOLOGY

Approved by AICTE, Affiliated to JNTUK, Kakinada
Vidyutnagar, Kakinada-533003, E.G.Dt, ANDHRA PRADESH.
2021-2025

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DEPARTMENT OF COMPUTER SCIENCE AND ENGINEERING

CERTIFICATE

This is to certify that the Internship entitled, " *SALESFORCE ADMINISTRATOR VIRTUAL INTERNSHIP* " is a bonafide of **S S K KARTHIKEYA, (216K1A05B0),** submitted to the department of **COMPUTER SCIENCE AND ENGINEERING**, in partial fulfillment of the requirements for the award of the degree of **BACHELOR OF TECHNOLOGY** in **COMPUTER SCIENCE AND ENGINEERING** from **IDEAL INSTITUTE OF TECHNOLOGY**, Kakinada.

Signature of the Internship Coordinator   Signature of the HOD

Mr.M.V.V.CHOWDARY, M.Tech.,   **Mr.M.S.R.S.PRASAD, M.Tech.,[Ph.D.]**

ASSISTANT PROFESSOR   **HEAD OF THE DEPARTMENT**

External Examiner

__DECLARATION__

We hereby declare that the internship report entitled, **"SALESFORCE ADMINISTRATOR VIRTUAL INTERNSHIP"** has been carried out and contents have been submitted in partial fulfillment of the requirements for the award of the degree **BACHELOR OF TECHNOLOGY** in **COMPUTER SCIENCE AND ENGINEERING**, **IDEAL INSTITUTE OF TECHNOLOGY,** Affiliated to JNTUK, Kakinada. We assure that this internship report has not been submitted to any other University or College.

__NAME__	__ROLL.NO__	__SIGNATURE__
S S K KARTHIKEYA	**216K1A05B0**	

ACKNOWLEDGEMENT

S S K KARTHIKEYA   **216K1A05B0**

CERTIFICATE OF COMPLETION

October 31, 2023

S S K Karthikeya

Salesforce Administrator Virtual Internship

During the 8 Weeks period of Virtual Internship **(August-October 2023),** S S K Karthikeya has completed the following Salesforce Trailhead modules

Salesforce Fundamentals
Organizational Setup
Relationship & Sales Cloud
Service Cloud & Process Automation
Flow & Chatter
Security, Reports & Dashboards
Data Management

Admin Super Set

Certificate ID: SISFVIPAD2023 -67412 | Verify this certificate @ https://smartinternz.com/in ternships/salesforce_certificates/7d3c92fe608388da63fa395ebe233316

Shri Buddha Chandraseker
Chief Coordinating Officer(CCO),
NEAT Cell-AICTE

Mr Amarender Katkam
Founder & CEO, TheSmartBridge &
SmartInternz

In Partnership With

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Smart Internz

I am S S K KARTHIKEYA ,bearing PIN 216K1A05B0 OF B.Tech in COMPUTERS SCIENCE AND ENGINEERING student of IDEAL INSTITUTE OF TECHNOLOGY, KAKINADA. I successfully completed INTERNSHIP through "SALESFORCE ADMINISTRATOR VIRTUAL INTERNSHIP" during the period of 8 weeks (August-October 2023).

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VIRTUAL INTERNSHIP

Certificate of Virtual Internship

This is to certify that

S.S.K Karthikeya

Ideal Institute of Technology

has successfully completed 10 weeks

Cybersecurity Virtual Internship

During September - November 2023

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Chief Coordinating Officer (CCO)
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Student ID :STU61d01d350717c1641028917

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has successfully completed 10 weeks

Process Mining Virtual Internship

during May - July 2023

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Head of Academic Alliance
Celonis

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Student ID :STU61d01d350717c1641028917

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ABSTRACT

Salesforce is a customer relationship management solution that brings companies and customers together. It's one integrated CRM platform that gives all your departments — including marketing, sales, commerce, and service — a single, shared view of every customer.

Salesforce is an online solution for customer relationship management, or CRM. Salesforce is a company that makes cloud-based software designed to help businesses find more prospects, close more deals, and wow customers with amazing service the global leader in CRM has collaborated with the All India Council for Technical Education (AICTE) to provide educators and students with the digital skills they require for the future of work. During the process students will be introduced to Trailhead, Salesforce's free learning platform, gaining access to learning resources and modules related to Salesforce. According to IDC, the Salesforce Economy in India will create 1.3 million jobs and $66.4 billion in new business revenues by2026. Salesforce is also driving significant growth for its partner ecosystem in India, which will make $6.55 for every $1 Salesforce makes locally by 2026.

CHAPTER-1

INTRODUCTION

<u>INTRODUCTION</u>

Salesforce is an American cloud-based software company headquartered in San Francisco, California. It provides customer relationship management (CRM) software and applications focused on sales, customer service, marketing automation, analytics, and application development.

Salesforce's products include several customer relationship management (CRM) technologies, including Sales Cloud, Service Cloud, Marketing Cloud, and Commerce Cloud and Platform. Additional technologies include Slack, MuleSoft, Tableau Analytics, and Trailhead.

I have completed this internship program through Smart Internz. It has organised 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 consisted of live sessions, Hands-on practical activities, mentoring support and working on super badges on Trailhead platform.

Trailhead is a very good platform for learning Salesforce for freshers. Trailhead is Salesforce's free online learning platform to teach people how to use Salesforce. By using Trailhead, beginners can develop Salesforce skills, and advanced users can become Salesforce experts. The Bootcamp is organised for 3 weeks where 2 Live Sessions were conducted per week with 3 Hours per session. Learners were asked to complete the self-paced courses on Trailhead platform parallelly along with the boot camps.

I have completed Salesforce Developer Trailmix course through this program. And have completed all the 29 modules and the 2 super badges included in the course.

CHAPTER -2

SALESFORCE ADMINISTRATOR TRAILMIX

SALESFORCE ADMINISTRATOR TRAILMIX

Salesforce Administrator Trail mix online course is developed by Salesforce is designed for individuals who want to learn everything there is, to understand about Salesforce, to become professional salesforce developers. The Salesforce Developer Trail mix online course focuses on covering basic Salesforce technology functionality utilising several programming languages. This course contains 18 modules and 7 super badges. Those are listed below:

Modules:

Salesforce Administrator Modules

1. Salesforce Fundamentals & User Set – Up

2. Accounts & Contacts

3. Data Modelling

4. Service Cloud

5. Process Automation

6. Flow Builder

7. Flow Builder Modules

8. Security Tools

9. Super badge Program Security: Quick Look

10. Credential Security

11. User Authentication Settings Super badge Unit

12. User Authentication

13. Multi-Factor Authentication and Single Sign-on Settings

MODULES

◆ 2.1.1 Trailhead and Trailblazer Community

This module explains what Trailhead is and who it's for, what the Trailblazer Community is and who it's for.

Trailhead and the Trailblazer Community are part of one unified platform. The Trailblazer Community helps you learn relevant skills, connect with the Trailblazers, and give back. Together, Trailhead and the Trailblazer Community are your one-stop shop to learn, earn, and connect from anywhere. Whether you're an admin just starting out, a graduate fresh from college, a Salesforce user, or just someone who loves to learn

◆ 2.1.2 Salesforce Platform Basics

This module explains about the salesforce platform, Dreamhouse scenario and no code (declarative) and programmatic development. And introduces us, with the platform, navigate use cases, and build custom functionality.

◆ 2.1.3 Salesforce Fundamentals & User Set-Up Introduction

After completing this Module, you'll be able to:

- ● Describe the perks of using objects on the Salesforce platform.

- ●Explain the difference between standard objects and custom objects.

- ● List the types of custom fields an object can have.

◆ 2.1.4 Accounts &Contacts

After completing this Module, you'll be able to:

- ● Describe what business accounts and contacts are, and explain how they're related.

- ● Describe what a person account is.

- ● Add a new business account and associated contact.

◆ 2.1.5 Data Modeling :This module explains standard and custom objects, how to create object relationships and use of schema builder.

◆ 2.1.6 Service Cloud: This module teaches us how to Set up customer service for our business for salesforce.

◆ **2.1.7 Process Automation:** Process Builder is a workflow tool that helps automate businessProcesses without writing a single line of code. For example, imagine that a company you do business with (which we call an Account in Salesforce), changes its location. You'd want a way to automatically update the business address of all the people that work at that company.

◆ **2.1.8 Flow Builder:** This module teaches how to explore Flow Builder and learn when to use flows to automate our business processes.

◆ **2.1.9 Flow Builder Modules:** This module teaches to know Flow Builder and learn to automate our business process with a flow.

◆ **2.1.10 Chatter Administration:** After completing this unit, you'll be able to:

- Describe groups.

- Find and use group administrative features.

- Create public and private groups.

◆ **2.1.11 Security Tools:** This module teaches how to control access to data using point-and-click security tools.

◆ **2.1.12 Super Badge Program Security: Quick Look:**

This module teaches us how to unlock superbadge content by demonstrating your awareness of credential program security.

◆ **2.1.13 Credential Security:** This module teaches us how to generate and protect access credentials at your Organization. Password hygiene is as crucial to your internal organizational systems as it is for the credentials you use to access your email, calendar, and other work-related.

◆ 2.1.14 User Authentication Settings Superbadge Unit:

This module teaches us how to import and export data in Salesforce.

◆ 2.1.15 User Authentication : This module gives insights into your Salesforce org with this powerful monitoring feature.

◆ 2.1.16 Multi-Factor Authentication and Single Sign-on Settings Superbadge Unit:

This module teaches us how to control access to data using point and-click security tools

◆ 2.1.17 User Authentication Troubleshooting Super badge Unit:

This module teaches how to use field - level security and permission

sets to control what data users can see in an app. In this super badge unit, you

work through a day in the life of an #AwesomeAdmin as you solve some user authentication cases.

◆ **2.1.18 User authentication specialist superbadge:**
This module explain show to encrypt our data at-rest in thecloud and manage

the lifecycle of your encryption keys.

◆ **2.1.19 Reports and Dashboards:**

This module teaches us how to visualise key business metrics in real time using Lightning Experience.

◆ **2.1.20 Data Management:**

This module teaches us learn how to import and export data in Salesforce.

◆ 2.1.21 Reports & Dashboards for Lightining Experiences:

This module teaches us how to visualise key business metrics in using Lightning Experience.

◆ 2.1.22 Create Reports And Dashboards For Sales And Marketing Managers:

This module explains how to track key business information for stakeholders with reports

and dashboards.

◆ 2.1.23 Dashboards:

This module teaches us how to control access to data using point- and click security tools

◆ 2.1.24 Identity Basics:

This module helps us to secure your org so users can log in once to access a variety of apps, orgs, and services.

CHAPTER-3

SUPER BADGES

SUPER BADGES

Super badges are skill-based, domain - level credentials that ask you to show your Salesforce expertise by solving complex, real - world -inspired challenges that businesses face everyday.

◆ 3.1.1 Business Administration Specialist :

◆ Clean and import account data
◆ Create users and manage access
◆ Create email templates for new marketing needs
◆ Create reports and dashboards

◆ Manage and apply Chatter tools

◆ 3.1.2 Lightening Experience Report &Dashboards Specialist:

◆ Administer report and dashboard visibility and access

◆ Apply report types and fields

◆ Design a record filtering strategy

◆ Create and surface report charts and dashboards

◆ Apply buckets, groups, and custom summary formulas

◆ Create dashboard components

◆ 3.1.3 User Authentication Specialist Super badge:

◆ Identify the appropriate user authentication settings.

◆ Describe various multi-factor authentication and single configurations. sign-on

◆ Explain ways to troubleshoot user authentication issues.

◆ **3.1.4 Security Governance Specialist Super badge** :

◆ Describe the monitoring capabilities of various Salesforce tools.

◆ Identify security governance best practices and principles.

◆ Explain how to customize auditing activities and tools.

◆ **3.1.5 User Access Specialist Superbadge :**

◆ Explain the best practices for granting access to objects and fields.

◆ Identify use cases for sharing and restriction rules.

◆ Describe steps to troubleshoot user access issues.

◆ **3.1.6 Security Specialist Super badge :**

◆ Describe the user authentication best practices and considerations.

◆ Explain various methods and tools to effectively monitor a Salesforce org.

◆ Identify the best methods to control user access.

◆ **3.1.7 Admin Super Set** :

◆ Describe the user authentication best practices and considerations.

◆ Explain various methods and tools to effectively monitor a Salesforce org.

◆ Identify the best methods to control user access.

RESULT

S S K Karthikeya
Student at Ideal Institute Of Technology
Andhra Pradesh, India

Tell us about yourself! Add a short bio.

salesforce.com/trailblazer/sskkarthikeya

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EXPEDITIONER
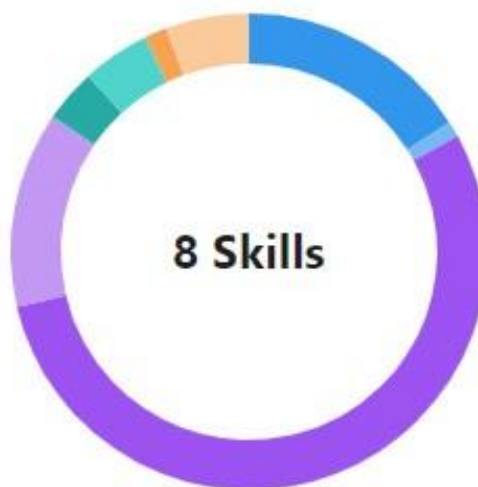
52 Badges   **66,950** Points   **5** Trails

*Earn **48** more badges to reach Ranger rank.*

Go to Trailhead

Community Tags

Skills

Skills you developed while earning Trailhead badges

8 Skills

- CRM
- Data Management
- General
- Security
- Apex
- App Logic
- Database
- Reporting

<u>CONCLUSION</u>

Salesforce is a good CRM platform that helps various businesses to make use of their customer data well. Through this program individuals will examine the Administrator system capabilities. Individuals will gain knowledge of data modelling, data security and validation methodologies, as well as Security services skills. Individuals will also learn how to logically customize apps using formulas and validation rules, as well as build business process models utilizing process builders and flows.

Skills I learned through this course:

1. Management

2. Security

3. Data Management

4. Integration

5. Database

6. Testing

7. Build different data models

8. Schema Building

Through this program one can learn in -demand Sales force Skills, earn resume worthy credentials and connect to opportunities in Salesforce ecosystem.

REFERENCES

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_sales_force_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
https://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/salesforce_-platform-quick-look?trailmix creator id-ddowd&trailmix slug-home-serve-trail mix-what-is- salesforce

⚫ Salesforce User Tour
https://trailhead.salesforce.com/content/learn/modules/lex_sales_force_tour?_trailmix creator_id=igeddes&trailmix slug=what- is-salesforce

⚫Salesforce Licensing
https://trailhead.salesforce.com/content/learn/modules/salesforc_e-licensing_trailmix creator_id=jgeddes&trailmix slug=what- is-salesforce