

Study Guide

Salesforce Certified Platform
Foundations



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Salesforce Certified Platform Foundations - Yatharth Chauhan

Complete Study Guide to Prepare for an Exam.

Introduction: What is Salesforce Platform Foundations?

The Salesforce Platform Foundations certification (previously called "Salesforce Associate") is the perfect starting point for anyone who wants to understand how Salesforce works. This is the EASIEST Salesforce certification you can get, and it's designed for beginners.

Think of Salesforce as a powerful tool that helps businesses manage their customers. This certification proves you understand:

- How Salesforce connects different departments (sales, service, marketing)
- How to find information quickly
- How data is organized
- How to create simple reports to see your business results

Who should take this exam?

- Anyone new to Salesforce (0-6 months experience)
- Sales reps who use Salesforce daily
- Customer service people
- Marketing folks
- Anyone who wants to start a Salesforce career

EXAM BASICS: What You Need to Know

Total Questions: 40 multiple-choice questions plus up to 5 practice questions that don't count

Time Given: 70 minutes (1 hour 10 minutes)

Passing Score: 62% (which means about 25 questions correct out of 40)

Cost: 75 USD (approximately 6,000 INR)

Retake Cost: FREE! If you fail, you can try again for free

Prerequisites: None - anyone can take this exam

Language: Available in English and other languages

Where to Take: Online from home or at a testing center

This is the EASIEST passing score in Salesforce certifications! Only 62% needed.

THE 4 EXAM TOPICS: What You Must Study

Your exam covers 4 main areas. Let me explain each one simply:

1. Salesforce Ecosystem - 32% of Exam (About 13 questions)

This is the BIGGEST section. Focus hard here!

What is "Ecosystem"?

Think of an ecosystem like a forest - many things work together. Salesforce ecosystem means:

- The Salesforce platform itself
- All the people who use it
- All the apps you can add
- All the learning resources
- The community of users

A) What Does Salesforce Do?

Salesforce is a CRM (Customer Relationship Management) system.

In simple words: It helps businesses keep track of their customers and sell more.

Example Without Salesforce:

- Sales team uses Excel
- Customer service uses email
- Marketing uses a different tool
- Nobody knows what others are doing
- Customer information is everywhere
- Big mess!

Example With Salesforce:

- Everything in one place
- Everyone sees the same customer information

- Sales knows what service team told the customer
- Marketing knows what sales team is doing
- Organized and efficient!

B) Salesforce Customer 360

Customer 360 means seeing a complete picture of your customer.

Think of it like this:

- Your customer calls support - Logged in Salesforce
- Your customer buys something - Logged in Salesforce
- Your customer clicks an email - Logged in Salesforce
- Sales rep can see EVERYTHING about this customer in one screen

Salesforce Customer 360 includes these products:

1. Sales Cloud - Helps salespeople sell more
 - Track deals (opportunities)
 - Manage customer contacts
 - Forecast sales numbers
2. Service Cloud - Helps customer service teams
 - Answer customer questions (cases)
 - Track support tickets
 - Live chat with customers
3. Marketing Cloud - Helps marketing teams
 - Send email campaigns
 - Track customer behavior
 - Create targeted ads
4. Commerce Cloud - Helps with online stores
 - Build e-commerce websites
 - Manage product catalogs
 - Process orders

5. Analytics Cloud (Tableau) - Helps see data visually

- Create beautiful charts
- Understand business trends
- Make data-driven decisions

6. Platform and Apps - Build custom solutions

- Create custom apps
- Automate business processes
- Connect other systems

For the exam, remember: Salesforce Customer 360 connects ALL departments with ONE shared view of the customer.

C) Trailhead - The Free Learning Platform

Trailhead is Salesforce's free online learning website (trailhead.salesforce.com).

Think of it like a video game for learning:

- You complete "modules" (lessons)
- You earn "badges" (achievements)
- You earn "points" (for completing challenges)
- You get a "Trailblazer profile" (your learning record)

Types of Content on Trailhead:

- Modules: Short lessons on specific topics (like "How to create reports")
- Projects: Hands-on practice in a real Salesforce environment
- Trails: A collection of modules on one big topic
- Trailmixes: Custom learning paths you or others create
- Superbadges: Advanced hands-on challenges

For the exam, know:

- Trailhead is 100 percent FREE
- You can learn at your own pace
- You get a practice environment called "Trailhead Playground"
- You can track your learning progress

D) Trailblazer Community

The Trailblazer Community is where Salesforce users help each other.

Think of it like:

- A forum where you can ask questions
- Other users answer your questions
- You can join local groups
- You can attend events (online and in-person)

What You Can Do in Trailblazer Community:

- Ask technical questions
- Get career advice
- Find local user groups
- Attend Trailblazer Community Group meetings
- Network with other professionals

For the exam, remember: The Trailblazer Community is FREE and helps users connect and learn from each other.

E) AppExchange - The Salesforce App Store

AppExchange is like the App Store for Salesforce (appexchange.salesforce.com).

You can find:

- Apps: Ready-to-use applications (like a document signing app)
- Components: Small pieces you add to pages (like a special calculator)
- Consulting Services: Companies that can help you with Salesforce

Types of Apps:

- Free Apps: Cost nothing
- Paid Apps: Monthly subscription
- Managed Apps: Built by a company, they control updates
- Unmanaged Apps: You install and can customize completely

Example:

Your company needs electronic signatures. Instead of building it yourself:

1. Go to AppExchange
2. Search "electronic signature"
3. Find "DocuSign" app
4. Install it in your Salesforce
5. Done! Now you can send documents for signature

For the exam, know: AppExchange extends Salesforce with thousands of pre-built solutions.

F) Agentforce - AI Agents (NEW!)

Agentforce is Salesforce's newest AI feature - smart computer helpers.

Think of Agentforce agents as:

- Virtual assistants that understand customer questions
- AI workers that can actually DO tasks (not just answer)
- Available 24/7 to help customers

Simple Example:

- Customer asks: "Where is my order?"
- Agentforce agent looks up the order automatically
- Agent replies: "Your order number 12345 shipped yesterday and will arrive tomorrow"
- No human needed!

For the exam, know: Agentforce uses AI to help customers and employees automatically.

G) Types of Salesforce Environments

Salesforce has different "versions" for different purposes:

1. Production Org - The REAL environment
 - Where real business happens
 - Real customer data
 - Real money transactions
 - Must be careful here!
2. Sandbox - Practice environment
 - Copy of production (or empty)
 - Safe to test things
 - Can't hurt real data
 - Types: Developer, Developer Pro, Partial, Full

3. Trailhead Playground - Free learning environment

- Given free by Salesforce
- For learning and practice
- Not for real business

For the exam, remember: Production is real; Sandbox and Playgrounds are for testing.

H) Multitenant Architecture

This is a fancy word for a simple idea.

Single Tenant (Old way - like renting a house):

- Each company gets their own building (server)
- Expensive
- Company maintains it
- Updates are hard

Multitenant (Salesforce way - like living in an apartment building):

- Many companies share the same building (server)
- Much cheaper
- Salesforce maintains it
- Everyone gets updates at the same time
- Your data is completely separate and secure

Analogy: Think of an apartment building:

- 100 families live there (100 companies using Salesforce)
- They share the building, elevator, and electricity
- But each apartment is private and secure
- The building manager (Salesforce) does all maintenance
- When they upgrade the elevator, everyone benefits

For the exam, know: Multitenant means many customers share the same infrastructure, but data is completely separate.

2. Navigation - 28% of Exam (About 11 questions)

This section is about HOW to move around Salesforce and find things.

A) The Lightning Experience Interface

Lightning Experience is the modern Salesforce interface (the way it looks).

Old Interface: Salesforce Classic (old, clunky)

New Interface: Lightning Experience (modern, fast, beautiful)

For the exam, focus on Lightning Experience.

B) Key Navigation Elements

Let me show you the important parts of the Salesforce screen:

1. App Launcher (Waffle Icon - 9 dots)

Location: Top left corner

What it does:

- Shows all your apps
- Lets you switch between apps
- Search for apps and objects

Example Apps:

- Sales app (for sales team)
- Service app (for support team)
- Marketing app (for marketing team)

How to use it:

- Click the 9 dots icon
- See all available apps
- Click an app to open it
- Search for specific items

1. Global Search Bar

Location: Top middle of screen

What it does:

- Search EVERYTHING in Salesforce
- Find records, people, files, knowledge articles
- Shows instant results as you type

Smart Features:

- Autocomplete (suggests as you type)

- Spelling correction (fixes typos)
- Recent items shown first
- Filter by object type (only Accounts, only Contacts, etc.)

Example:

- Type "John" → See all records with "John" (contacts, accounts, opportunities)
- Click on the one you want

1. Navigation Bar

Location: Across the top

What it shows:

- Items in your current app
- Quick access to objects (like Accounts, Contacts, Opportunities)
- Recent items you viewed

You can customize this!

- Reorder items
- Add items
- Remove items

1. Setup (Gear Icon)

Location: Top right corner

What it does:

- Access admin settings
- Configure your Salesforce
- Manage users
- Install apps

Quick Find Box in Setup:

- Type what you're looking for
- Finds settings instantly
- Example: Type "users" to find user management

1. Home Page

The first page you see when you log in.

What's on it:

- Performance Charts: Your key metrics

- Recent Records: Things you looked at recently
- Tasks: Things you need to do
- Assistant: Smart suggestions (like "Follow up with this customer")

1. Utility Bar

Location: Bottom of screen (sometimes hidden)

What it contains:

- Notes (write quick notes)
- Recent Items (quick access)
- History (where you've been)
- Other useful tools

C) List Views

List Views show you filtered lists of records.

Think of it like:

- A spreadsheet view of your data
- You can filter to show only what matters
- You can sort and organize

Example List Views for Accounts:

- All Accounts (every account)
- My Accounts (only accounts you own)
- Recently Viewed (accounts you looked at recently)
- New This Week (accounts created this week)

Creating Custom List Views:

- Click "New" on list view dropdown
- Name your view
- Add filters (like "Show only California customers")
- Save it
- Now you can use it anytime

For the exam, know: List views help you see filtered, organized lists of records.

D) Favorites

Favorites let you bookmark important things.

How to favorite:

- Find a list view, report, or dashboard you use often
- Click the star icon
- Now it's saved in your favorites
- Quick access anytime

Where to see favorites:

- In the object's list views dropdown
- Shows your most-used items

E) Recycle Bin

The Recycle Bin is like the trash can on your computer.

What it does:

- Holds deleted records for 15 days
- You can restore deleted items
- After 15 days, items are permanently deleted

How to use:

- Go to App Launcher
- Search "Recycle Bin"
- See all deleted items
- Click "Undelete" to restore

For the exam, know: Recycle Bin keeps deleted records for 15 days before permanent deletion.

F) Setup Navigation

Setup is where admins configure Salesforce.

Two ways to find things in Setup:

1. Quick Find - Type what you want
 - Fastest way
 - Example: Type "users" to manage users
2. Setup Menu - Browse categories
 - Click categories on the left

- Explore options

Common Setup Locations for the Exam:

- Object Manager: Manage objects (like Accounts, Contacts)
 - Users: Add/edit users
 - Profiles: Control what users can see/do
 - Apps: Manage which apps are available
 - Company Settings: Company info, fiscal year, etc.
-

3. Data Model - 25% of Exam (About 10 questions)

The Data Model is HOW Salesforce organizes information.

Think of it like: How your filing cabinet is organized.

A) Objects - The Filing Cabinets

An Object is like a filing cabinet for a specific type of information.

Standard Objects (Built by Salesforce):

- Accounts: Companies you do business with
- Contacts: People at those companies
- Leads: Potential customers (not yet in your system)
- Opportunities: Deals you're trying to close (potential sales)
- Cases: Customer support tickets
- Tasks: Things to do
- Events: Calendar appointments

Custom Objects (Built by you):

- You create these for your unique business needs
- Example: "Properties" (for real estate business)
- Example: "Invoices" (for tracking bills)
- Always end with "__c" (like Properties__c)

For the exam, know the difference:

- Standard = Pre-built by Salesforce
- Custom = You create for your business

B) Fields - The File Folders

A Field is a specific piece of information in an object.

Think of fields like columns in Excel.

Example - Account Object Fields:

- Account Name (the company name)
- Phone (company phone number)
- Industry (what type of business)
- Annual Revenue (how much money they make)

Types of Fields (Important for Exam!):

1. Text Field - Regular text
 - Example: Account Name, Email
 - Can be short (up to 255 characters) or long (up to 131,072 characters)
2. Number Field - Numbers only
 - Example: Annual Revenue, Number of Employees
 - Can do math on these
3. Currency Field - Money amounts
 - Example: Opportunity Amount
 - Shows dollar sign or other currency
4. Date Field - Dates only
 - Example: Close Date, Birthdate
 - Format: MM/DD/YYYY
5. Date/Time Field - Date AND time
 - Example: Meeting Time, Created Date
6. Checkbox Field - Yes or No (True or False)
 - Example: "Is Customer Active?"
 - Checked = Yes, Unchecked = No
7. Picklist Field - Dropdown menu with choices

- Example: Industry (choices: Technology, Healthcare, Finance)
 - User picks ONE option from the list
8. Multi-Select Picklist - Dropdown where you can pick MULTIPLE
- Example: Interests (can pick: Sports, Music, Travel)
9. Formula Field - Automatic calculation
- Example: Total Price = Quantity times Unit Price
 - You don't type it, Salesforce calculates
10. Lookup Field - Links to another record
- Example: Contact has a lookup to Account
 - Creates a relationship
11. Email Field - Email addresses
- Example: someone@company.com
 - Can click to send email
12. Phone Field - Phone numbers
- Example: (555) 123-4567
 - Can click to call
13. URL Field - Websites
- Example: www.company.com
 - Can click to open website

For the exam, know:

- Different field types exist for different data
- Formula fields calculate automatically
- Picklists limit choices

C) Records - The Individual Files

A Record is ONE entry in an object.

Think of it like: One row in Excel.

Examples:

- Account Object: One record = One company (like "Apple Inc.")
- Contact Object: One record = One person (like "John Smith")
- Opportunity Object: One record = One deal (like "Q4 Software Sale")

D) Relationships - How Things Connect

Relationships link objects together.

Think of relationships like: Connections between filing cabinets.

The Two Main Types:

1. Lookup Relationship (Loose connection)

Think of this as a "reference" or "suggestion."

Example:

- A Contact can be related to an Account
- But the Contact can exist WITHOUT an Account
- If you delete the Account, the Contact still exists (just disconnected)

Analogy: Like a business card in your wallet:

- The card references a company
- But if the company closes, you still have the card

Key Points:

- Not required (optional)
- Independent records
- Deleting parent doesn't delete child
- Child can exist alone

1. Master-Detail Relationship (Tight connection)

Think of this as "belongs to" or "owned by."

Example:

- An Order Line Item belongs to an Order
- If you delete the Order, the Line Items are also deleted
- Line Items CANNOT exist without an Order

Analogy: Like pages in a book:

- Pages belong to the book

- If you throw away the book, the pages go too
- Pages can't exist without the book

Key Points:

- Child depends on parent
- Deleting parent DELETES child
- Child inherits security from parent
- Child cannot exist alone

For the exam, remember:

- Lookup = Loose (independent)
- Master-Detail = Tight (dependent)

E) Schema Builder

Schema Builder is a visual tool to see your data model.

Think of it like: A map of how everything connects.

What you see:

- All your objects (boxes)
- All relationships (lines connecting boxes)
- Field names inside each box

How to use it:

- Go to Setup
- Type "Schema Builder" in Quick Find
- Drag objects onto the canvas
- See how they're related

You can also:

- Create new objects visually
- Create new fields by dragging
- Create relationships by connecting

For the exam, know: Schema Builder shows your data model visually.

F) Record-Level Security

Record-Level Security controls WHO can see and edit WHICH records.

Think of it like: Different keys for different rooms.

The 4 Layers (From Most Restrictive to Most Open):

Layer 1: Organization-Wide Defaults (OWD) - The Baseline

This is the DEFAULT access level for everyone.

Three Settings:

1. Private: Only the owner and their manager can see
2. Public Read Only: Everyone can see, but only owner can edit
3. Public Read/Write: Everyone can see and edit

Example:

- Set Opportunities to "Private"
- Result: Sales reps can only see their own opportunities (not their coworkers')

Layer 2: Role Hierarchy - Manager Access

Role Hierarchy gives managers access to their team's records.

How it works:

- You create a hierarchy (CEO → VP → Manager → Rep)
- Higher roles see everything below them
- Like a ladder - you can see down, not up

Example:

- Sales Manager can see all their sales reps' opportunities
- Sales Rep cannot see the manager's opportunities

Layer 3: Sharing Rules - Group Access

Sharing Rules open up access between groups.

How it works:

- Share records based on criteria
- Share with specific groups, roles, or teams

Example:

- "Share all California accounts with the West Coast team"
- Now the whole West Coast team can see California accounts

Layer 4: Manual Sharing - One-Time Access

Manual Sharing gives access to specific records one at a time.

How it works:

- You click "Share" on a record

- Choose who to share with
- Choose their access level (Read, Edit)

Example:

- Share one specific opportunity with a consultant
- Only that one opportunity, not all

For the exam, remember the order:

1. OWD (baseline for everyone)
2. Role Hierarchy (managers see team records)
3. Sharing Rules (group-based exceptions)
4. Manual Sharing (one-off exceptions)

Opening vs. Closing Access:

- OWD sets the MOST RESTRICTIVE baseline
- Other layers only OPEN UP access
- You can't use layers 2-4 to CLOSE access below OWD

G) Field-Level Security

Field-Level Security controls which fields users can see.

Think of it like: Hiding certain columns in Excel from certain people.

Example:

- Everyone can see Account Name
- Only managers can see Annual Revenue field
- Sales reps can't see it at all

How to set it:

- Go to Setup → Object Manager
- Select the field
- Set field-level security by profile

H) Record Types

Record Types let you show different page layouts and picklist values to different users.

Think of it like: Different forms for different purposes.

Example - Cases Object:

- Customer Support Case record type

- Shows fields: Issue Description, Priority, Product
- Picklist values: Hardware, Software, Billing
- Internal IT Request record type
 - Shows fields: Employee Name, Equipment Needed, Budget Code
 - Picklist values: Laptop, Monitor, Software License

Why use Record Types?

- Different business processes need different fields
- Simplifies user experience
- Cleaner data entry

For the exam, know: Record Types control page layouts and picklist values for different processes.

I) Validation Rules

Validation Rules prevent bad data from being saved.

Think of it like: Quality control before saving.

Example:

"Opportunity Amount must be greater than 100 dollars"

- User tries to save an Opportunity for 50 dollars
- Salesforce shows an error: "Amount must be at least 100 dollars"
- User must fix it before saving

Another Example:

"Close Date must be in the future"

- User tries to close a deal with yesterday's date
- Salesforce blocks it
- User must use a future date

For the exam, know: Validation rules ensure data quality by blocking bad data.

J) Duplicate Management

Duplicate Management helps prevent duplicate records.

Think of it like: A guard who says "Wait, we already have this!"

Two Components:

1. Matching Rules - HOW to find duplicates

- Defines what fields to compare
- Example: "If email matches exactly, it's a duplicate"

2. Duplicate Rules - WHAT to do when found

- Block: Don't let user create the duplicate
- Allow: Let them create, but show a warning
- Report: Create a report of duplicates to clean up later

Example:

User tries to create a new Contact: "John Smith, john@email.com"

- Matching Rule checks: "Does this email exist already?"
- Finds: Yes! Already have a Contact with john@email.com
- Duplicate Rule says: Block creation
- User sees error: "Duplicate found! See existing record"

For the exam, know:

- Matching Rules find duplicates
- Duplicate Rules decide what action to take

4. Reports and Dashboards - 15% of Exam (About 6 questions)

This section is about SEEING your data visually.

A) What is a Report?

A Report is an organized list of your data.

Think of it like: A fancy filtered Excel spreadsheet.

Example:

"All Opportunities closing this month"

The report shows:

- Opportunity Name
- Amount
- Close Date
- Stage
- Owner

Report Formats (Types):

1. Tabular Report - Simple list

- Like a basic spreadsheet
- Rows and columns
- No grouping
- Best for: Simple lists, exporting to Excel

Example:

Name | Amount | Close Date

Acme Deal | 10,000 | 12/15/2025

Widget Sale | 5,000 | 12/20/2025

1. Summary Report - Grouped by one thing

- Groups records by a field
- Shows subtotals for each group
- Best for: Seeing totals by category

Example - Grouped by Owner:

John Smith (Total: 50,000)

- Acme Deal: 10,000

- Widget Sale: 40,000

Sarah Johnson (Total: 75,000)

- Tech Corp: 75,000

1. Matrix Report - Grouped by TWO things

- Groups by rows AND columns
- Like a pivot table

- Best for: Comparing across two dimensions

Example - Rows: Owner, Columns: Stage:

	Prospecting	Negotiation	Closed Won
John Smith	20,000	30,000	50,000
Sarah Johnson	15,000	25,000	75,000

1. Joined Report - Multiple report blocks together

- Combines different reports
- Shows related data side by side
- Best for: Complex comparisons

For the exam, know:

- Tabular = Simple list
- Summary = Grouped by one field
- Matrix = Grouped by two fields (rows and columns)
- Joined = Multiple reports combined

B) Report Builder

Report Builder is the tool to create reports.

Steps to Create a Report:

1. Choose Report Type

- What object(s) do you want to report on?
- Example: Accounts, Opportunities, Contacts

2. Add Filters

- What records do you want to include?
- Example: "Only Opportunities closing this quarter"

3. Select Columns (Fields)

- What information do you want to show?
- Example: Name, Amount, Owner, Stage

4. Group (if needed)

- How do you want to organize?
- Example: Group by Owner, then by Stage

5. Add Chart (optional)

- Visual representation
- Example: Bar chart of total amounts by owner

6. Save and Run

- Give it a name
- Choose where to save it (folder)
- Run to see results

C) Report Filters

Filters narrow down which records appear in your report.

Standard Filters:

- Date Range: Show records from specific time period
- Example: "This Quarter", "Last Month", "Custom"
- Show Me: Pre-built filters
- Example: "My Opportunities", "All Opportunities"

Custom Filters:

- Create your own rules
- Example: "Amount greater than 10,000"
- Example: "Stage equals 'Closed Won'"

Filter Logic:

- Use AND / OR to combine filters
- Example: "Amount greater than 10,000 AND Stage equals 'Prospecting'"

D) What is a Dashboard?

A Dashboard is a visual display of multiple reports.

Think of it like: A car dashboard showing speed, fuel, temperature all at once.

Dashboard Shows:

- Multiple charts at once

- Real-time data
- Visual summary of key metrics
- Helps you see business health at a glance

Example Dashboard: "Sales Performance"

- Chart 1: Total revenue this quarter (gauge)
- Chart 2: Top 10 sales reps (bar chart)
- Chart 3: Pipeline by stage (funnel chart)
- Chart 4: Closed deals this month (table)

Dashboard Components (also called Widgets):

- Each chart or table on the dashboard
- Each component comes from a report
- You can have up to 20 components per dashboard (in most editions)

E) Chart Types

Different charts show data in different ways.

1. Bar Chart (Horizontal bars)
 - Best for: Comparing categories
 - Example: Revenue by sales rep
2. Column Chart (Vertical bars)
 - Best for: Comparing over time
 - Example: Revenue by month
3. Line Chart
 - Best for: Trends over time
 - Example: Website visits per day
4. Pie Chart (Circle divided into slices)
 - Best for: Parts of a whole
 - Example: Revenue by product category
 - Shows percentages
5. Donut Chart (Like pie, but with hole in middle)

- Best for: Parts of a whole, but cleaner
- Example: Opportunities by stage

6. Funnel Chart

- Best for: Conversion processes
- Example: Sales pipeline (wide at top, narrow at bottom)

7. Gauge Chart

- Best for: Progress toward a goal
- Example: Revenue vs. quota
- Looks like a speedometer

8. Table

- Best for: Detailed data with numbers
- Example: List of top deals
- Rows and columns of data

For the exam, remember:

- Bar/Column = Comparing categories or time
- Line = Trends over time
- Pie/Donut = Parts of a whole (percentages)
- Funnel = Sales pipeline stages
- Gauge = Progress to goal
- Table = Detailed numbers

F) Dynamic Dashboards vs. Standard Dashboards

Standard Dashboard:

- Shows data based on ONE person's view (the "running user")
- Everyone sees the same data
- Example: Dashboard runs as CEO - shows all company data to everyone

Dynamic Dashboard:

- Shows data based on WHO is looking at it
- Each person sees their own data
- Example: Each sales rep sees only their own numbers

For the exam, know: Dynamic dashboards personalize data based on the viewer.

G) Dashboard Folders

Dashboards are saved in folders.

Three Folder Types:

1. Private: Only you can see
2. Public: Everyone can see
3. Shared: Specific people/groups can see

For the exam, know: Folder permissions control who can see dashboards.

IMPORTANT CONCEPTS FOR THE EXAM

Lightning App Builder

Lightning App Builder is a drag-and-drop tool to build custom pages.

Think of it like: Building with LEGO blocks.

What You Can Build:

- Custom home pages
- Custom record pages
- Custom app pages

Components:

- Pre-built pieces you drag onto the page
- Example: Report Chart component, Recent Items component
- Standard components (built by Salesforce)
- Custom components (you or others build)
- AppExchange components (from marketplace)

For the exam, know: Lightning App Builder lets you customize page layouts without coding.

Company Settings

Company Settings are organization-wide configurations.

Key Settings:

1. Fiscal Year

- Your company's financial year
- Example: January-December OR April-March
- Affects reports and forecasts

2. Company Information

- Company name
- Address
- Default currency
- Default language

3. Business Hours

- When your business is open
- Used for case escalation rules
- Example: Monday-Friday, 9 AM - 5 PM

For the exam, know: Company Settings apply to the entire organization.

EXAM QUESTION TYPES AND EXAMPLES

Type 1: Concept Questions

Example:

"What is the primary benefit of Salesforce's multitenant architecture?"

- A. Each customer has their own server
- B. Multiple customers share the same infrastructure, reducing costs
- C. Only one customer can use Salesforce at a time
- D. Customers must maintain their own servers

Answer: B (Multiple customers share infrastructure)

Type 2: Feature Questions

Example:

"Which tool should an admin use to visually see how objects are related?"

- A. Report Builder
- B. Schema Builder
- C. Lightning App Builder
- D. Dashboard

Answer: B (Schema Builder shows visual data model)

Type 3: Scenario Questions

Example:

"A sales manager wants to see all opportunities owned by their team members. Which feature provides this access?"

- A. Organization-Wide Defaults
- B. Role Hierarchy
- C. Sharing Rules
- D. Manual Sharing

Answer: B (Role Hierarchy gives managers access to team records)

Type 4: Comparison Questions

Example:

"What is the difference between a Lookup and Master-Detail relationship?"

- A. Lookup is required; Master-Detail is optional
- B. Master-Detail deletes child records when parent is deleted; Lookup does not
- C. Lookup is for custom objects only
- D. There is no difference

Answer: B (Master-Detail has dependent deletion)

STUDY STRATEGY: 4-Week Plan

Week 1: Learn the Basics

- Read this guide completely (2-3 times)
- Watch YouTube videos on Salesforce basics
- Create a Trailhead account (free)

- Complete “Salesforce Platform Basics” module on Trailhead

Week 2: Deep Dive Topics

- Complete the official Trailhead preparation path
- Focus on your weak areas (from practice tests)
- Join Trailblazer Community and ask questions
- Get hands-on in a Trailhead Playground

Week 3: Practice and Hands-On

- Take practice exams (available on Trailhead)
- Score your weak topics
- Do hands-on challenges in Playground
- Create reports and dashboards yourself

Week 4: Final Review

- Review this guide one more time
- Take final practice exam
- Make sure you’re scoring 70% or higher consistently
- Review any topics you still don’t understand
- Get good sleep before exam day!

COMMON MISTAKES TO AVOID

Mistake 1: Not understanding the ecosystem

- Fix: Know Trailhead, AppExchange, Community, Customer 360

Mistake 2: Confusing Lookup vs. Master-Detail

- Fix: Lookup = loose, Master-Detail = tight and dependent

Mistake 3: Not knowing report types

- Fix: Tabular, Summary, Matrix, Joined - know the differences

Mistake 4: Forgetting record-level security layers

- Fix: OWD, then Role Hierarchy, then Sharing Rules, then Manual Sharing

Mistake 5: Not knowing navigation elements

- Fix: App Launcher, Global Search, Setup, List Views - study each

VOCABULARY CHEAT SHEET

CRM: Software to manage customers

Object: A type of data (like Accounts or Contacts)

Record: One entry in an object

Field: One piece of information (like Email or Phone)

Org: Your Salesforce environment

Production: The real Salesforce environment with real data

Sandbox: Practice environment for testing

Trailhead: Free learning website

AppExchange: Salesforce app store

Lightning: Modern Salesforce interface

Classic: Old Salesforce interface

App Launcher: Menu to switch between apps

Schema Builder: Visual tool to see data model

OWD: Organization-Wide Defaults (baseline security)

Lookup: Loose relationship between objects

Master-Detail: Tight relationship (child depends on parent)

Report: Organized list of data

Dashboard: Visual display of multiple reports

List View: Filtered list of records

Record Type: Different forms for different processes

TEST DAY TIPS

Do This:

- Read questions slowly and carefully
- Eliminate obviously wrong answers first
- Look for keywords like "primary," "best," "most"
- If unsure, make your best guess (no penalty for guessing)
- Manage your time: 70 minutes divided by 40 questions equals 1.75 minutes per question
- Review flagged questions if time permits

Don't Do This:

- Rush through questions
 - Second-guess yourself too much
 - Leave questions blank (always guess)
 - Spend 5 minutes on one hard question
 - Panic if you don't know an answer
-

FREE STUDY RESOURCES

1. Salesforce Trailhead (100 percent Free)

- Official preparation path: "Prepare for your Salesforce Platform Foundations Certification"
- Takes about 8 hours total
- Hands-on practice included

2. Official Exam Guide (Free PDF)

- Download from Salesforce
- Shows exact exam outline
- Lists all topics tested

3. YouTube Channels (Free)

- Salesforce official channel
- "Salesforce Now" - exam prep series

- "Sfdc Panther" - certification tips
4. Trailblazer Community (Free)
 - Join study groups
 - Ask questions
 - Connect with others preparing
 5. Practice Exams
 - Trailhead has free practice questions
 - Focus on Force (paid but good)
 - Udemy practice tests (affordable)
-

WHY THIS CERTIFICATION MATTERS

Career Benefits:

- Entry into Salesforce ecosystem
- Foundation for advanced certifications
- Proves you understand CRM basics
- Helps you stand out in job applications

Skills You Prove:

- Understanding of CRM systems
- Basic Salesforce navigation
- Data organization concepts
- Reporting fundamentals

Next Steps After Passing:

- Salesforce Administrator certification
 - Salesforce Platform App Builder
 - Sales Cloud Consultant
 - Service Cloud Consultant
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SUMMARY: Your Quick Reference

Topic: Salesforce Ecosystem

Percent of Exam: 32 percent

Key Takeaway: Customer 360, Trailhead, AppExchange, Multitenant, Agentforce

Topic: Navigation

Percent of Exam: 28 percent

Key Takeaway: App Launcher, Global Search, List Views, Setup, Lightning Experience

Topic: Data Model

Percent of Exam: 25 percent

Key Takeaway: Objects, Fields, Records, Relationships (Lookup vs Master-Detail), Security

Topic: Reports and Dashboards

Percent of Exam: 15 percent

Key Takeaway: Report types, Charts, Dashboards, Filters

Remember:

- 40 questions, 70 minutes
 - 62 percent to pass (only 25 correct needed!)
 - FREE retake if you fail
 - Focus on Ecosystem (32 percent) and Navigation (28 percent)
-

FINAL ENCOURAGEMENT

This is the EASIEST Salesforce certification. You can do this!

Remember:

- Only 62 percent needed to pass
- FREE retake if needed
- No prerequisites
- Entry-level exam

Study Plan:

- Read this guide completely
- Complete Trailhead modules
- Take practice exams
- Get hands-on experience
- Take the exam when you're consistently scoring 70 percent or higher

Good luck! You've got this!

One More Thing:

The Platform Foundations certification is your FIRST STEP into the Salesforce ecosystem. After you pass this, you'll be ready to:

- Pursue the Administrator certification (next logical step)
- Build real-world Salesforce skills
- Advance your career
- Join a Salesforce Yatri community of millions of Salesforce professionals: [Click to Join](#)

Now go study and pass that exam!