



Salesforce Admin & App Builder Training Course



"Become a certified Salesforce Admin & App Builder with Upskillment's expert-led training."



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INTRODUCTION

Upskillment's Salesforce Admin & App Builder Training Course is designed to help you master Salesforce CRM, focusing on administration and app building. It prepares you for the Salesforce Administrator (CRT 101) and Platform App Builder (CRT 403) certification exams.

Course Highlights:

- Customization & Configuration: Learn to customize Salesforce, including page layouts, fields, tabs, and business processes.
- Business Process Automation: Master workflow automation, validation rules, and formula fields to optimize business operations.
- Reports & Dashboards: Gain skills in creating high-value reports and dashboards for data-driven decision-making.
- Security & Access Control: Learn to configure Salesforce's security models, including managing object, field, and record-level access.
- Salesforce Cloud Solutions: Manage customer relationships with Sales Cloud and enhance customer service with Service Cloud.



Why Choose Upskillment's Advanced Business Analysis Program ?



Expert-Led Training

- Courses are designed and delivered by industry experts with years of practical experience.
- Real-world scenarios and use cases ensure a practical, application-focused learning approach.

Comprehensive Learning Support

- Live Interactive Sessions: Engage with instructors in real-time for better understanding and instant doubt resolution.
- 24/7 Support: Round-the-clock assistance ensures no learner is left behind.

Hands-On Learning

- Focus on project-based learning to build real-world skills. Access to datasets, case studies, and tools relevant to the industry.

Industry-Recognized Certifications

- Gain certifications that are valued by top companies across industries. Build credibility and add value to your resume. Career Advancement Opportunities

CURRICULUM

Module 1: Introduction to Cloud Computing & Salesforce Platform

- Overview of Cloud Computing: Understanding cloud infrastructure, SaaS, PaaS, IaaS.
- Salesforce Platform Basics: Key features, architecture, and benefits of Salesforce CRM.
- Cloud Computing in CRM: How Salesforce utilizes cloud computing for CRM solutions.

Module 2: Building Blocks of Salesforce Platform

- Salesforce Environment: Introduction to Salesforce editions, clouds, and user interface.
- Salesforce Architecture: Overview of multi-tenant architecture, data model, and scalability.
- Key Components: Objects, fields, records, relationships, and workflows.

Module 3: Salesforce Data Model, Objects, Relationships, and Fields

- Understanding Salesforce Objects: Standard vs. custom objects and their applications.
- Relationships in Salesforce: One-to-many, many-to-many relationships.
- Field Types and Management: Custom fields, field-level security, and validation rules.

Module 4: Salesforce Security Model and Features

- Salesforce Security Overview: Object-level, field-level, and record-level security.
- User Permissions & Profiles: Setting up user roles, profiles, and permission sets.
- Managing Access Control: Role hierarchies, sharing rules, and manual sharing.

Module 5: Salesforce Security Model -

Object, Record, and Field Level Features

- Object-Level Security: Profile and permission set configurations.
- Record-Level Security: Setting up sharing rules and roles.
- Field-Level Security: Controlling access to specific fields in Salesforce records.

Module 6: Business Logic, Formulas, and Validations

- Formulas & Validations: Setting up formula fields and validation rules.
- Automating Business Logic: Using formula fields for calculations and logic-based operations.
- Error Handling: Managing and debugging validation rule errors.

Module 7: Business Process Automation in Salesforce

- Workflow Rules: Automating processes using workflow rules, email alerts, and field updates.
- Process Builder: Advanced process automation with Process Builder.
- Flow Automation: Introduction to Salesforce Flow for complex automation.

Module 8: Customer Management with Salesforce Sales Cloud

- Managing Leads and Opportunities: Customizing sales stages and pipelines.
- Salesforce Sales Cloud Features: Tracking activities, managing contacts, and accounts.
- Reports & Dashboards: Creating actionable reports and dashboards to track sales performance.

Module 9: Customer Service Solution with Salesforce Service Cloud

- Service Cloud Overview: Managing customer service requests and case management.
- Service Console: Streamlining agent workflows and case resolution.
- Knowledge Management: Using Salesforce to store and access knowledge articles.

Module 10: Data Handling & Processing in Salesforce

- Importing & Exporting Data: Using tools like Data Loader and Data Import Wizard.
- Data Processing and Cleansing: Data deduplication and cleanup.
- Data Management Strategies: Best practices for maintaining accurate and up-to-date data.

Module 11: Validation and Workflow Rules

- Creating Validation Rules: Ensuring data quality with field-specific validations.
- Configuring Workflow Rules: Automating actions like task creation, field updates, and notifications.
- Advanced Workflow Features: Combining multiple actions and criteria for complex workflows.

Module 12: Reports and Dashboards in Salesforce

- Report Types: Creating tabular, summary, matrix, and joined reports.
- Building Dashboards: Visualizing data with charts, tables, and graphs for decision-making.
- Report Scheduling: Automating report generation and distribution.

Module 13:

- Salesforce Lightning App Builder and Salesforce 1
- Salesforce Lightning Experience: Customizing the Salesforce Lightning interface.
- App Builder: Creating custom apps with the Lightning App Builder.
- Salesforce 1 Mobile App: Customizing Salesforce for mobile use.

Module 14:

Activity Management, AppExchange, Content, and Folder Management

- Activity Management: Tracking tasks, events, and calendars within Salesforce.
- AppExchange: Exploring and installing third-party apps from Salesforce AppExchange.
- Content and Folder Management: Organizing Salesforce files, documents, and folders.

Module 15:

Chatter, Global Action, and Publisher Layout

- Salesforce Chatter: Enabling social collaboration within Salesforce.
- Global Action: Configuring and using Global Actions for creating records.
- Publisher Layouts: Customizing publisher layouts to streamline record creation.

Salesforce Admin & App Builder Training Outlook

Flexible Learning Options:

Choose what fits your schedule! Attend classes on weekdays or weekends, and select from morning or evening sessions to accommodate your personal commitments.

Class Rescheduling Flexibility: Never miss a session! If you're unable to attend, you can easily switch to another batch that fits your availability.

Dedicated Learning Manager: Get personalized support from a Learning Manager who is fully committed to answering all your questions and guiding you throughout the course.

Job Assistance: Receive dedicated job assistance, including resume building, interview preparation, and job placement support to help you land your dream role

Hands-On Projects and Real-World Simulations:

Gain practical experience with industry-relevant projects and simulations, ensuring you can apply your knowledge to real-world scenarios.

Industry-Recognized Certification: Earn a certification that is recognized by top organizations, validating your expertise and helping you stand out in the competitive job market.

Salesforce Career Outlook and Industry Growth

- Industry-Leading Platform
- Salesforce holds a 19.6% market share in CRM, leading the market over its top four competitors combined.
- Opportunities with Top MNCs
- Leading global companies like Accenture, IBM, Deloitte, Intel, Shell, and Unilever trust Salesforce to manage their CRM solutions.
- Lucrative Salary
- The average salary for a Salesforce Administrator is approximately \$145,000 per year, with the potential to earn additional cash bonuses of around \$5,000.
- Versatility in Roles
- Salesforce certification opens doors to various roles such as Salesforce Administrator, App Builder, Developer, and Consultant across industries.
- Global Recognition
- Salesforce certifications are globally respected, enhancing your professional credibility and expanding career opportunities in diverse sectors.

LET'S CONNECT

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