

SALESFORCE ADMINISTRATOR AND APP BUILDER CERTIFICATION TRAINING

Course Outline





Program Overview:

This Salesforce certification training course is designed to teach you how to master the concepts needed to become a Salesforce administrator and app builder. You will learn how to configure Salesforce to collect, analyze, and retrieve vital customer information and to create applications using Salesforce Lightning

Program Features:

- 78 hours of blended learning
- 30 hours of Online self-paced learning
- 48 hours of instructor-led training Four industry projects with 28 case studies
- 30 hours of hands-on practice with Salesforce Lightning

Delivery Mode:

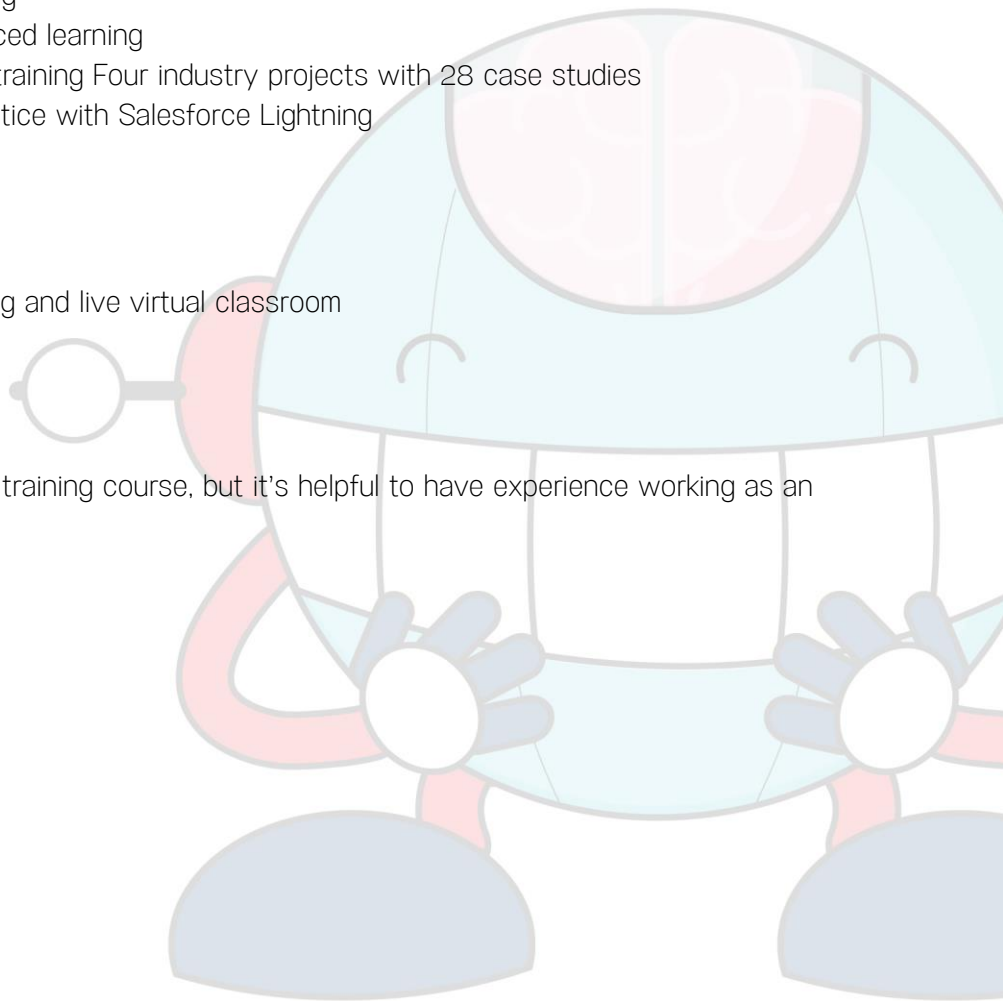
Blended - Online self-paced learning and live virtual classroom

Prerequisites:

There are no prerequisites for this training course, but it's helpful to have experience working as an administrator or developer.

Target Audience:

- App builders
- Developers
- System administrators
- Sales representatives
- IT managers
- Product managers





Key Learning Outcomes:

By the end of this training course, you will be able to:

- Gain an overview of Salesforce
- Learn about Salesforce objects and how to create, rename, or modify objects
- Create different field types and validation rules Work on security controls
- Create, deploy, and implement workflows
- Manage data and reports Create, configure, and manage dashboards
- Understand chatter, application lifecycle, visual workflow, and schema builder
- Install lightning components
- Configure and manage Sales Cloud and Service Cloud
- Master Salesforce's interface, help and training, app exchange, and other important functions
- Deploy applications and manage changes to the Force.com platform
- Develop new applications using the declarative interface and Force.com fundamentals
- Configure the user interface

Certification Details & Criteria:

To become a Certified Salesforce Administrator and Developer, you must pass the Salesforce Administrator Exam and the Salesforce App Builder Exam. You can pass the exams by following these easy steps.

Step 1: Complete the Salesforce training course

Step 2: Visit certification.salesforce.com and register to take both exams: Salesforce Administrator and Salesforce App Builder

Step 3: Pass the Salesforce exams and earn your certification

Simplilearn Course Completion Criteria:

Online Classroom:

- Attend one complete batch
- Complete one simulation test with a minimum score of 60 percent



Online Self-Learning:

- Complete 85 percent of the course
- Complete one simulation test with a minimum score of 60 percent

Course Curriculum:

Lesson 00 - Introduction to Salesforce

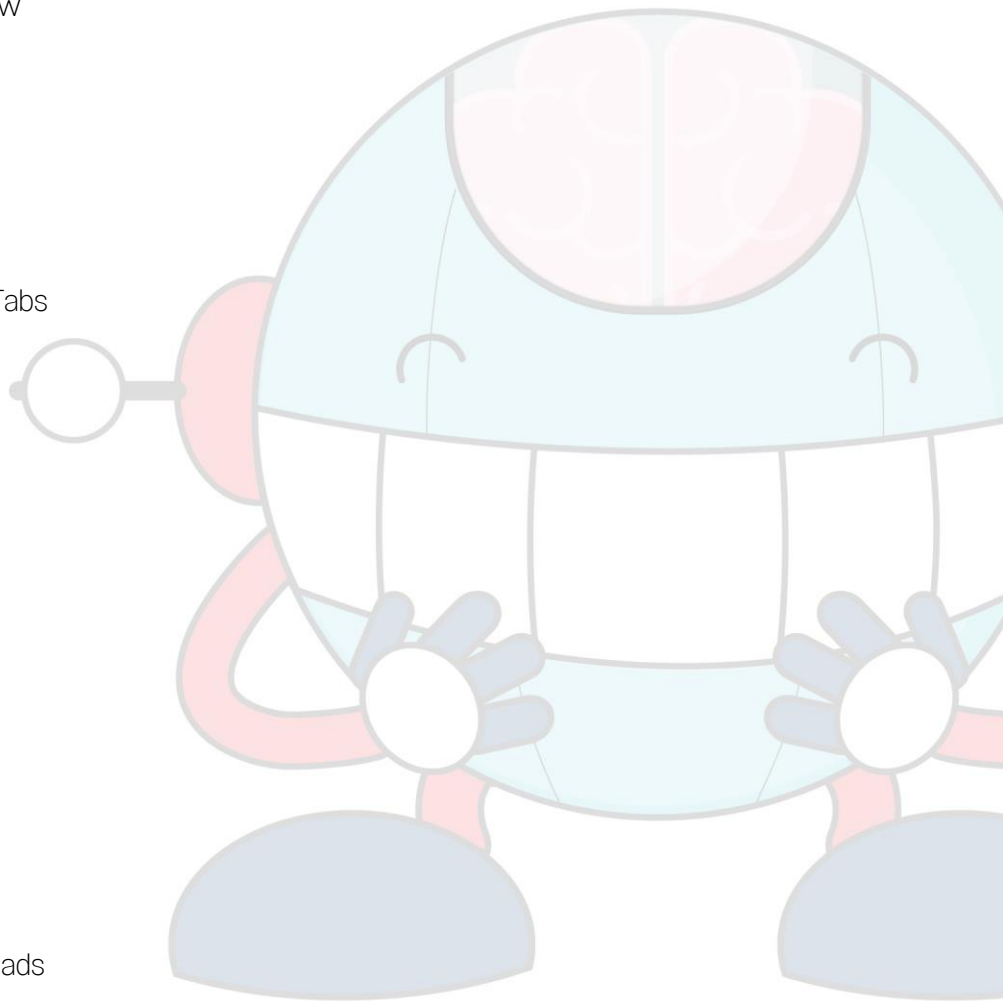
- Introduction to Salesforce

Lesson 01 - Salesforce Overview

- Salesforce
- Salesforce Overview
- Introduction to Salesforce
- Salesforce Editions
- Home Page Customization
- User Management
- Creating and Customizing Tabs
- Creating an App
- Uploading a Company Logo
- Company Information Page
- System Overview Page
- Updating the Fiscal Year
- Quiz
- Case Study
- Case study Demo
- Key Takeaways
- Conclusion

Lesson 02 - Sales Cloud

- Introduction to Sales Cloud
- Sales Cloud
- Leads Home Page
- Creating List Views
- Creating and Converting Leads
- Creating Accounts
- Creating Contacts





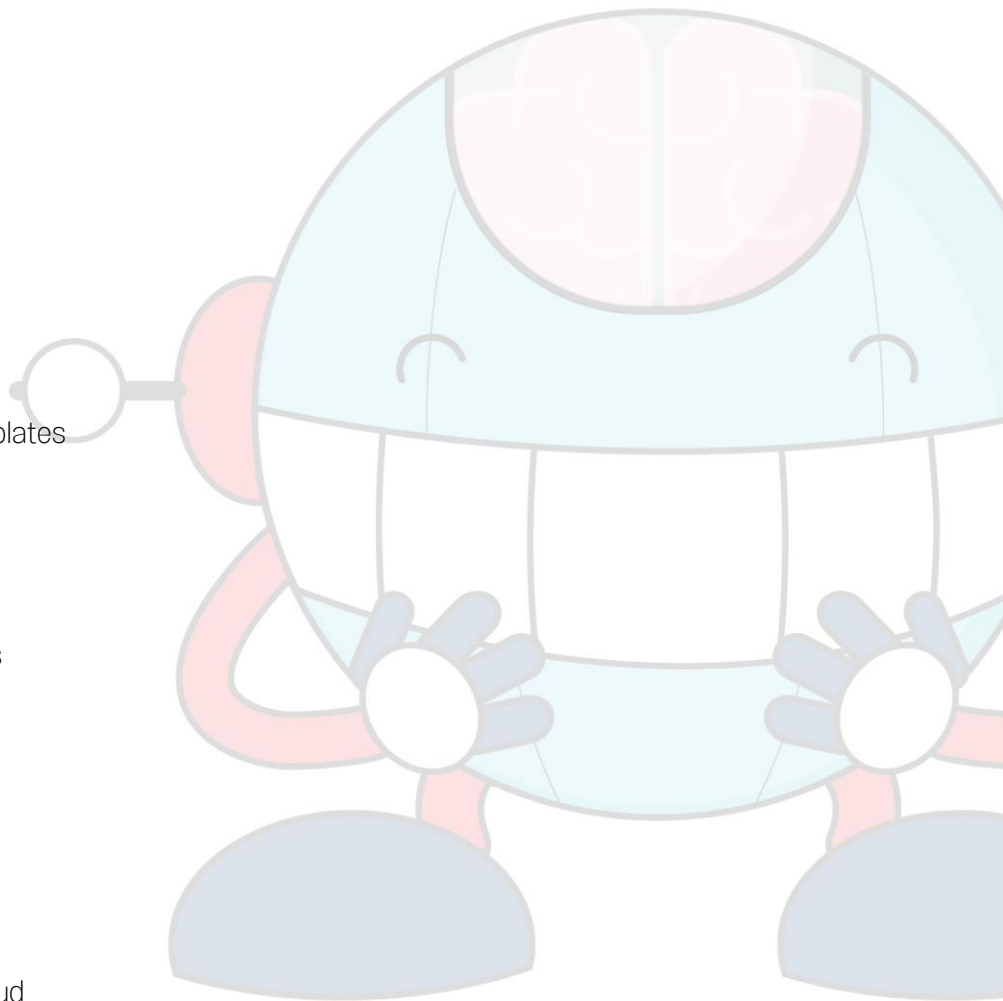
- Creating Email Templates
- Sending Individual Emails
- Sending Mass Emails
- Creating and Managing Price Books
- Creating Products
- Creating Opportunities
- Creating Activities
- Creating a Web-to-Lead Form
- Creating a Lead Assignment Rule
- Creating a Lead Queue Sending Mass Emails
- Creating an Auto-Response Rule
- Creating Campaigns
- Record Types
- Quiz
- Case Study 1
- Case Study Demo
- Case Study 2
- Case Study Demo 2
- Key Takeaways
- Conclusion

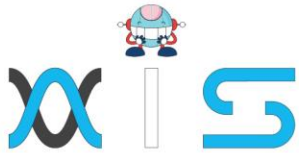
Lesson 03 - Quote Templates

- Introduction to Quote Templates
- Quote Templates
- Creating a Quote Record
- Creating a Quote Template
- Generating a Quote PDF
- Emailing a Quote PDF
- Modifying Quote Templates
- Quiz Case Study
- Case Study Demo
- Key Takeaways
- Conclusion

Lesson 04 - Service Cloud

- Introduction to Service Cloud
- Service Cloud

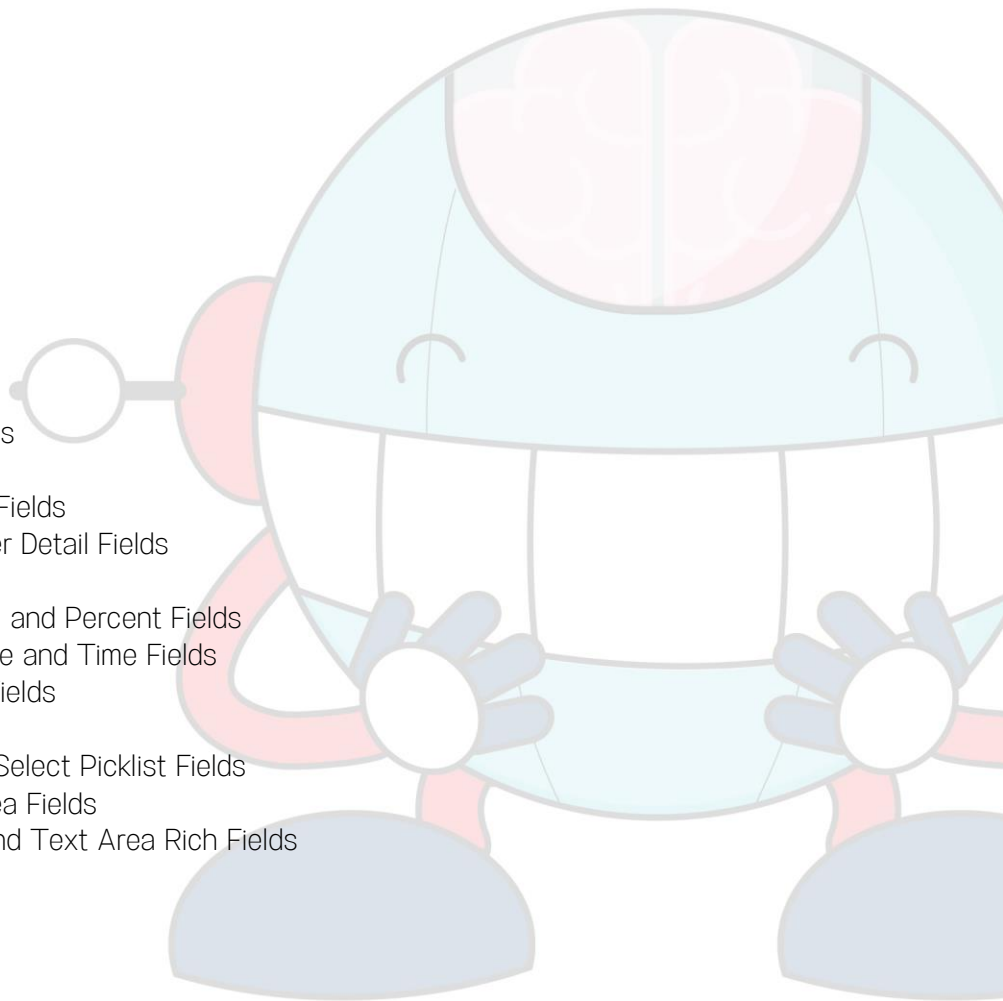


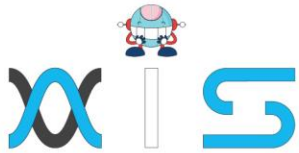


- Creating Cases
- Creating Case Assignment Rules
- Creating Case Escalation Rules
- Enabling Solutions
- Creating Solutions
- Attaching Solutions to Cases
- Enabling Knowledge
- Configuring Knowledge
- Creating a Web-to-Case Form
- Creating an Email-to-Case Address
- Quiz
- Case Study 1
- Case Study 1 Demo
- Case Study 2
- Case Study 2 Demo
- Key takeaways
- Conclusion

Lesson 05 - Field Types

- Introduction to Field Types
- Field Types
- Modifying Standard Fields
- Creating Auto-number Fields
- Creating Formula Fields
- Creating Roll-Up Summary Fields
- Creating Lookup and Master Detail Fields
- Creating Checkbox Fields
- Creating Currency, Number, and Percent Fields
- Creating Date Field and Date and Time Fields
- Creating Phone and Email Fields
- Creating Geolocation Fields
- Creating Picklist and Multi-Select Picklist Fields
- Creating Text and Text Area Fields
- Creating Text Area Long and Text Area Rich Fields
- Creating Encrypted Fields
- Creating URL Fields
- Quiz
- Case Study
- Case Study Demo





- Key takeaways
- Conclusion

Lesson 06 - Salesforce Objects

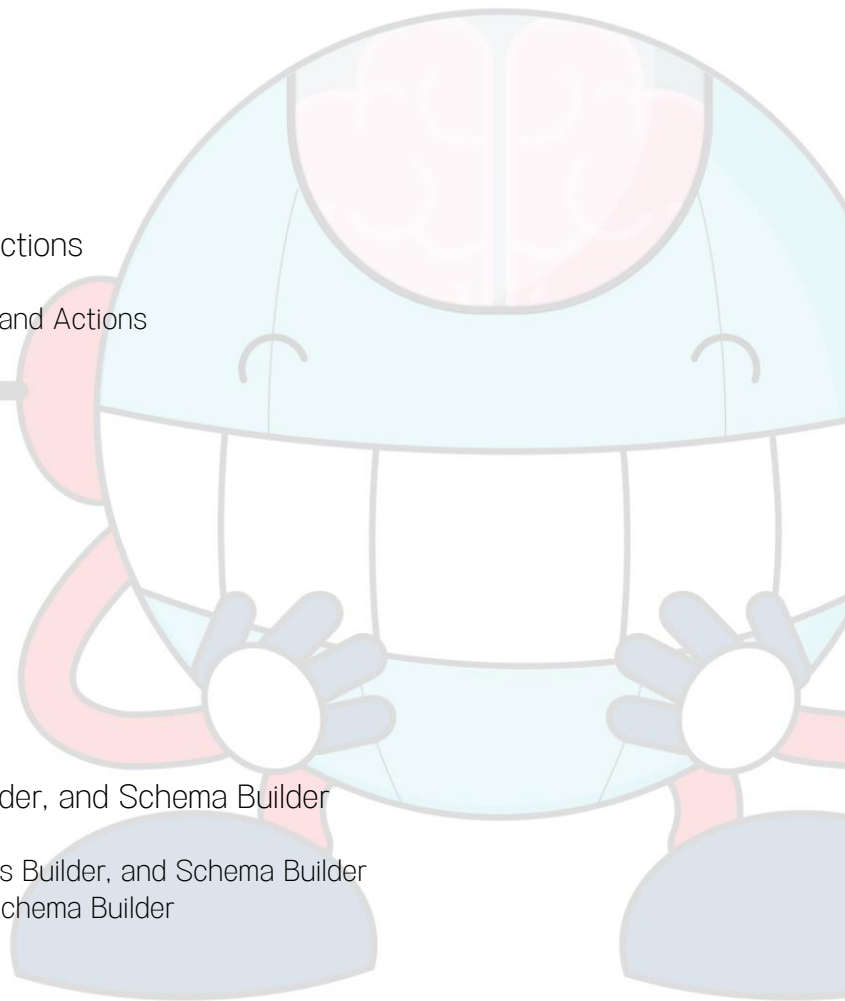
- Introduction to Salesforce Objects
- Salesforce Objects
- Standard Object Components
- Renaming Standard Objects
- Modifying Standard Objects
- Understanding External Objects
- Creating Custom Objects
- Quiz
- Case Study
- Case Study Demo
- Key Takeaways
- Conclusion

Lesson 07 - Creating Buttons, Links, and Actions

- Introduction to Creating Buttons, Links, and Actions
- Creating Buttons, Links, and Actions
- Creating New Records with Actions
- Logging a Call with Actions
- Updating a Record with Actions
- Creating Custom Buttons
- Creating Custom Links
- Quiz
- Case Study
- Case Study Demo
- Key Takeaways
- Conclusion

Lesson 08 - Visual Workflow, Process Builder, and Schema Builder

- Introduction to Visual Workflow, Process Builder, and Schema Builder
- Visual Workflow, Process Builder, and Schema Builder
- Creating a Visual Flow
- Modifying Existing Flows
- Creating a Process in the Process Builder





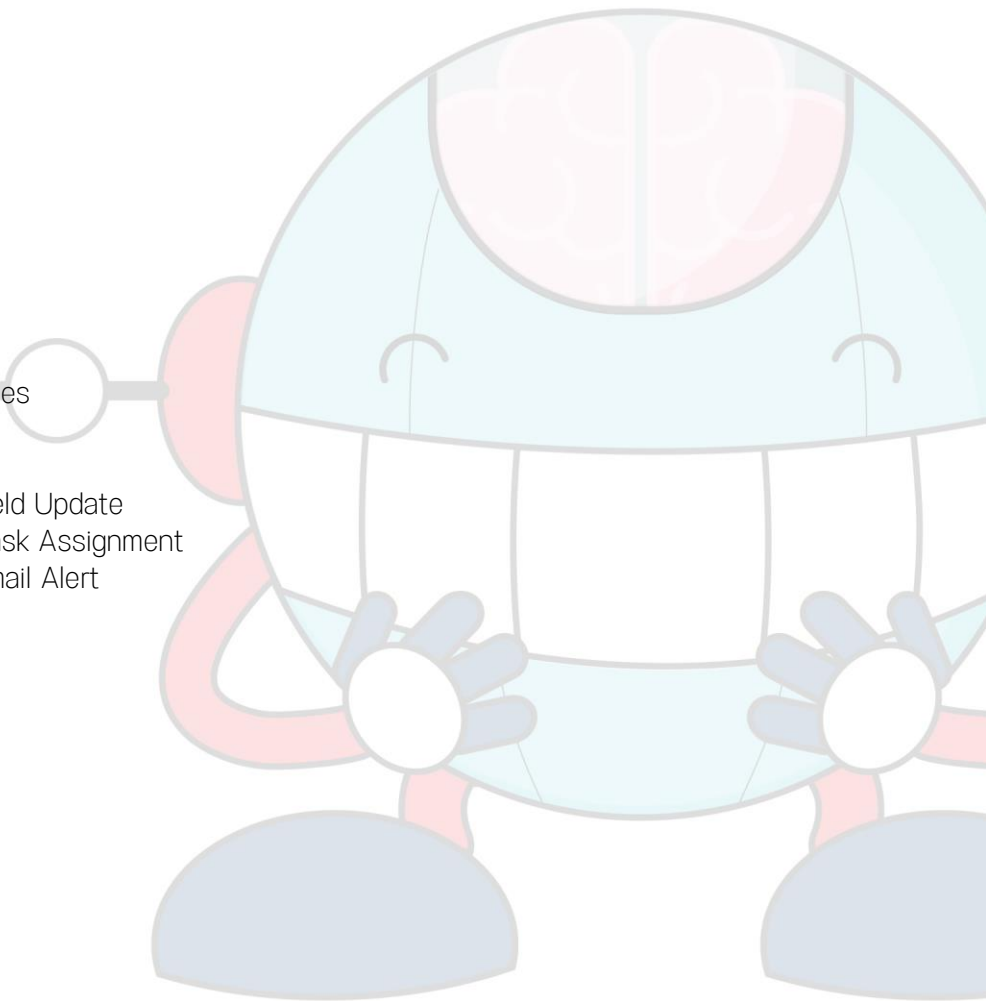
- Creating Fields in the Schema Builder
- Quiz
- Case Study
- Case Study Demo
- Key Takeaways
- Conclusion

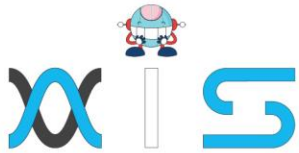
Lesson 09 - Validation Rules

- Introduction to Validation Rules
- Validation Rules
- Creating Validation Rules
- Creating Formulas
- Creating Error Messages
- Quiz
- Case Study
- Case Study Demo
- Key Takeaways
- Conclusion

Lesson 10 - Workflow Rules

- Introduction to Workflow Rules
- Workflow Rules
- Creating a Workflow Rule
- Creating a Workflow Rule Field Update
- Creating a Workflow Rule Task Assignment
- Creating a Workflow Rule Email Alert
- Quiz
- Case Study 1
- Case Study Demo
- Case Study 2
- Case Study Demo
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- Conclusion





Lesson 11 - Lightning Components

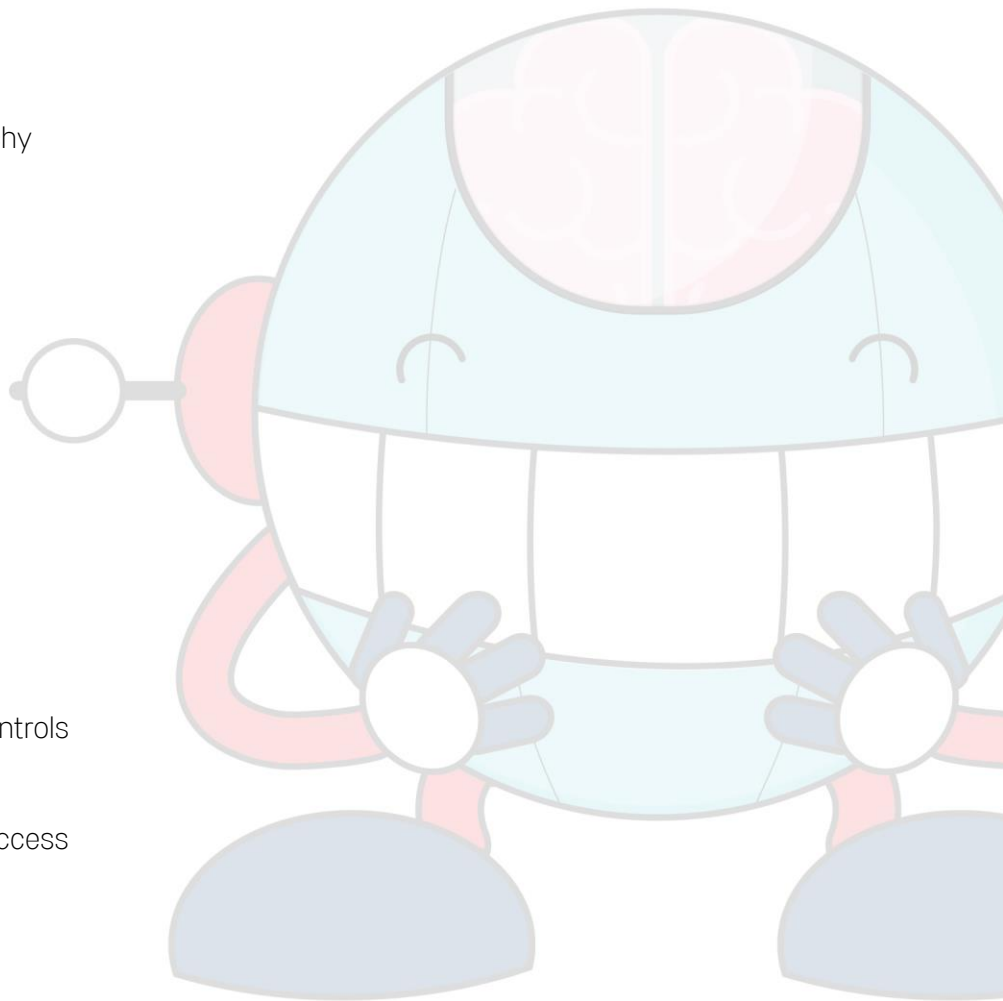
- Introduction to Lightning Components
- Lightning Components
- Installing Lightning Components
- Lightning Component Capabilities
- Lightning Components vs. Visualforce
- Quiz
- Case Study
- Case Study Demo
- Key Takeaways
- Conclusion

Lesson 12 - Role Hierarchy

- Introduction to Role Hierarchy
- Role Hierarchy
- Viewing Role Hierarchy
- Creating Roles
- Enabling Field History
- Creating Groups
- Creating Permission Sets
- Assigning Roles to Users
- Quiz
- Case Study
- Case Study Demo
- Key Takeaways
- Conclusion

Lesson 13 - Security Controls

- Introduction to Security Controls
- Security Controls
- Viewing Object Security
- Changing Default Record Access
- Sharing Settings
- Field Accessibility
- Password Policies
- Session Settings
- Login Flows

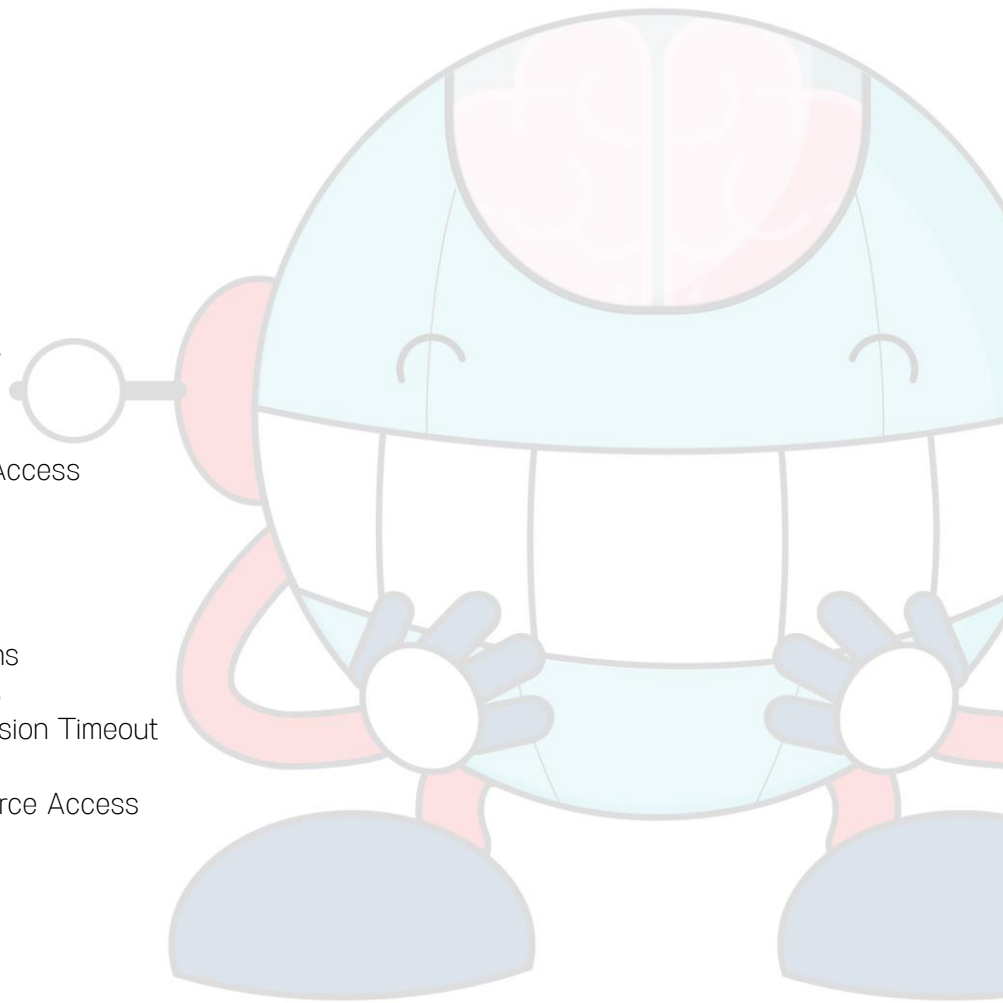




- Network Access
- Activations
- Session Management
- Login Access Policies
- Certificate and Key Management
- Viewing Setup Audit Trail
- Executing Expire All Passwords
- Delegated Administration
- Remote Site Settings
- Named Credentials
- File Upload and Download Security
- Quiz
- Case Study
- Case Study Demo
- Key Takeaways
- Conclusion

Lesson 14 - Profiles

- Introduction to Profiles
- Profiles
- Standard Profiles Overview
- Assigning Page Layouts
- Field-Level Security
- Custom App Settings and Access
- Tab Settings
- Record Type Settings
- Administrative Permissions
- General User Permissions
- Standard Object Permissions
- Custom Object Permissions
- Password Policies and Session Timeout
- Login Hours and IP Ranges
- Enabling Apex and Visualforce Access
- Quiz
- Case Study
- Case Study Demo
- Key Takeaways
- Conclusion



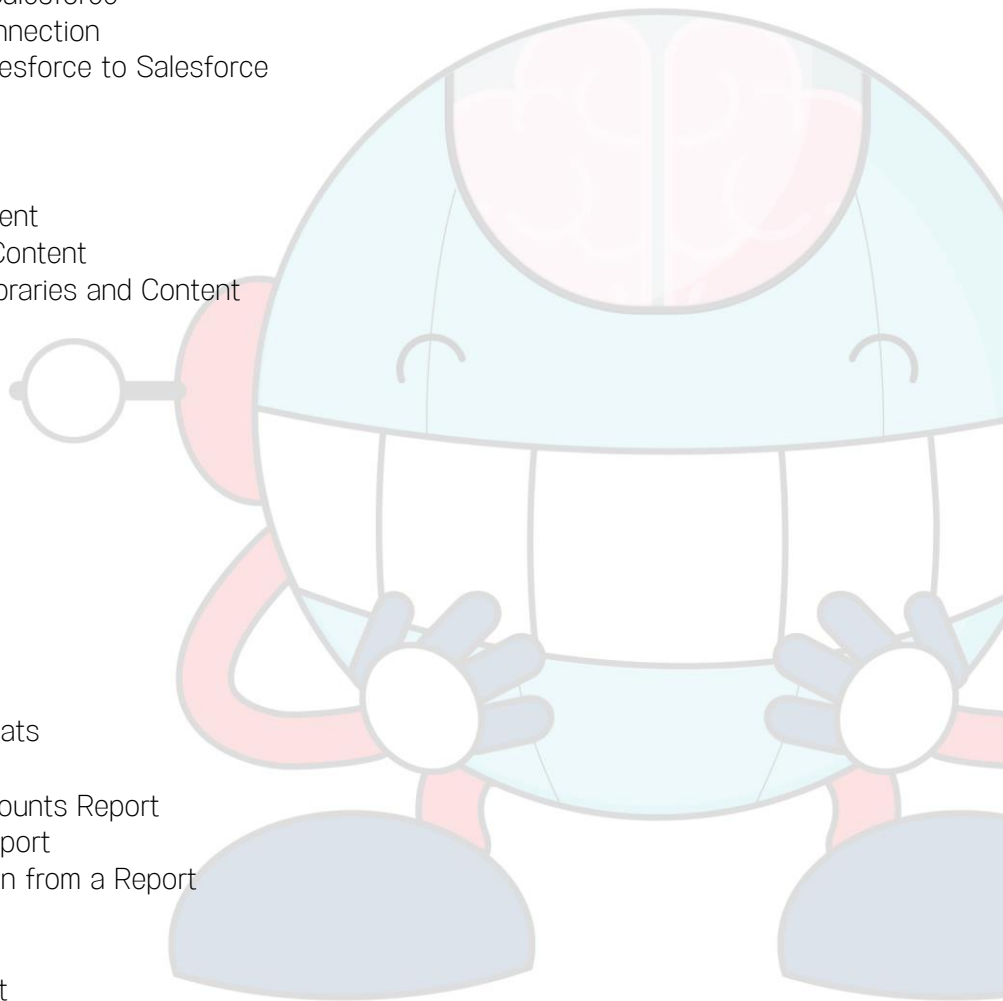


Lesson 15 - Chatter

- Introduction to Chatter
- Chatter
- Chatter Overview
- Enabling Chatter
- Enabling Chatter Feeds on Records
- Configuring Chatter Groups
- Creating Customer Groups
- Creating a Free Customer Chatter User
- Customizing Chatter Email Notifications
- Configuring Salesforce to Salesforce
- Accepting a Salesforce Connection
- Sharing an Account via Salesforce to Salesforce
- Enabling Ideas
- Configuring Ideas Themes
- Enabling Social Accounts
- Enabling Libraries and Content
- Customizing Libraries and Content
- Uploading Documents to Libraries and Content
- Configuring Salesforce
- Quiz
- Case Study
- Case Study Demo
- Key Takeaways
- Conclusion

Lesson 16 - Reports

- Introduction to Reports
- Reports
- Understanding Report Formats
- Creating a Leads Report
- Creating Contacts and Accounts Report
- Creating an Opportunity Report
- Adding Leads to a Campaign from a Report
- Creating a Report Chart
- Scheduling Reports
- Creating a Campaign Report
- Summarizing Report Data





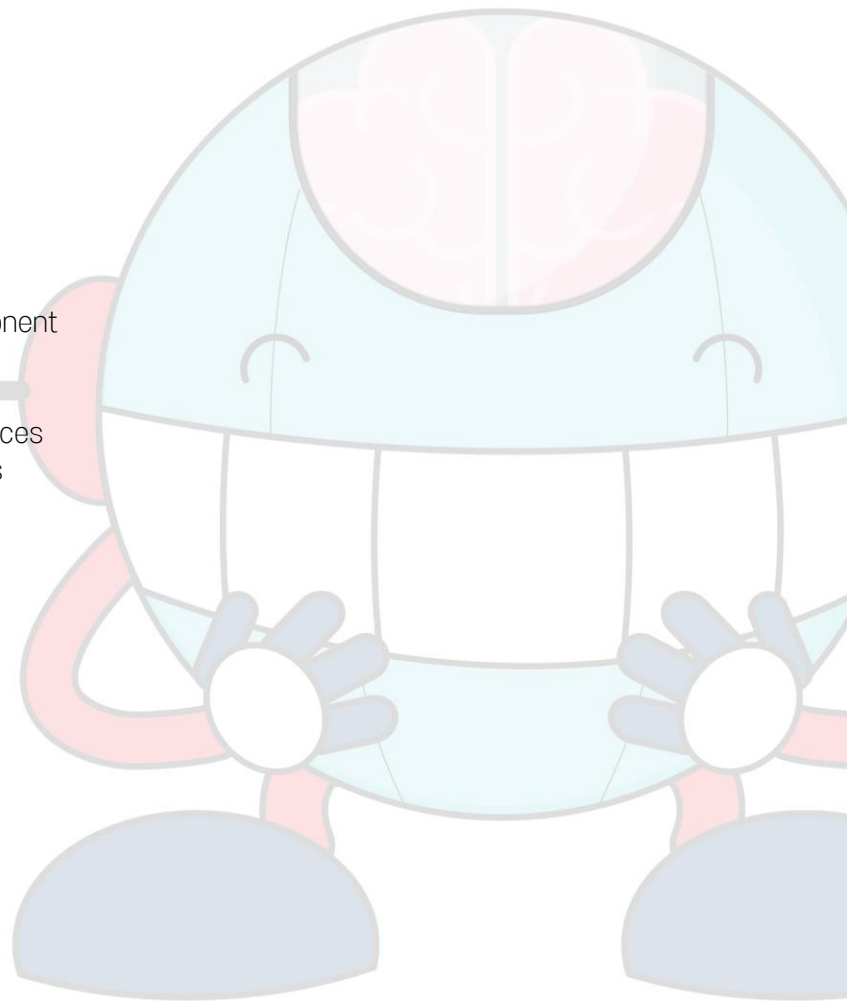
- Creating a Report Formula
- Exporting Reports to Excel
- Quiz
- Case Study 1
- Case Study 1 Demo
- Case Study 2 Case
- Study 2 Demo
- Key Takeaways
- Conclusion

Lesson 17 - Dashboards

- Introduction to Dashboards
- Dashboards
- Understanding Dashboard Components
- Creating a Dashboard
- Refreshing a Dashboard
- Modifying Columns on Dashboards
- Adding Filter to Dashboard
- Managing Access to Reports
- Adding a Report as a Dashboard Component
- Setting Up Dynamic Dashboards
- Enabling Dashboards for iPad
- Modifying Report and Dashboard Interfaces
- Activating the Report Builder on Profiles
- Quiz
- Case Study
- Case Study Demo
- Key Takeaways
- Conclusion

Lesson 18 - Data Management

- Introduction to Data Management
- Data Management
- Importing Leads
- Importing Contacts and Accounts
- Using Mass Delete





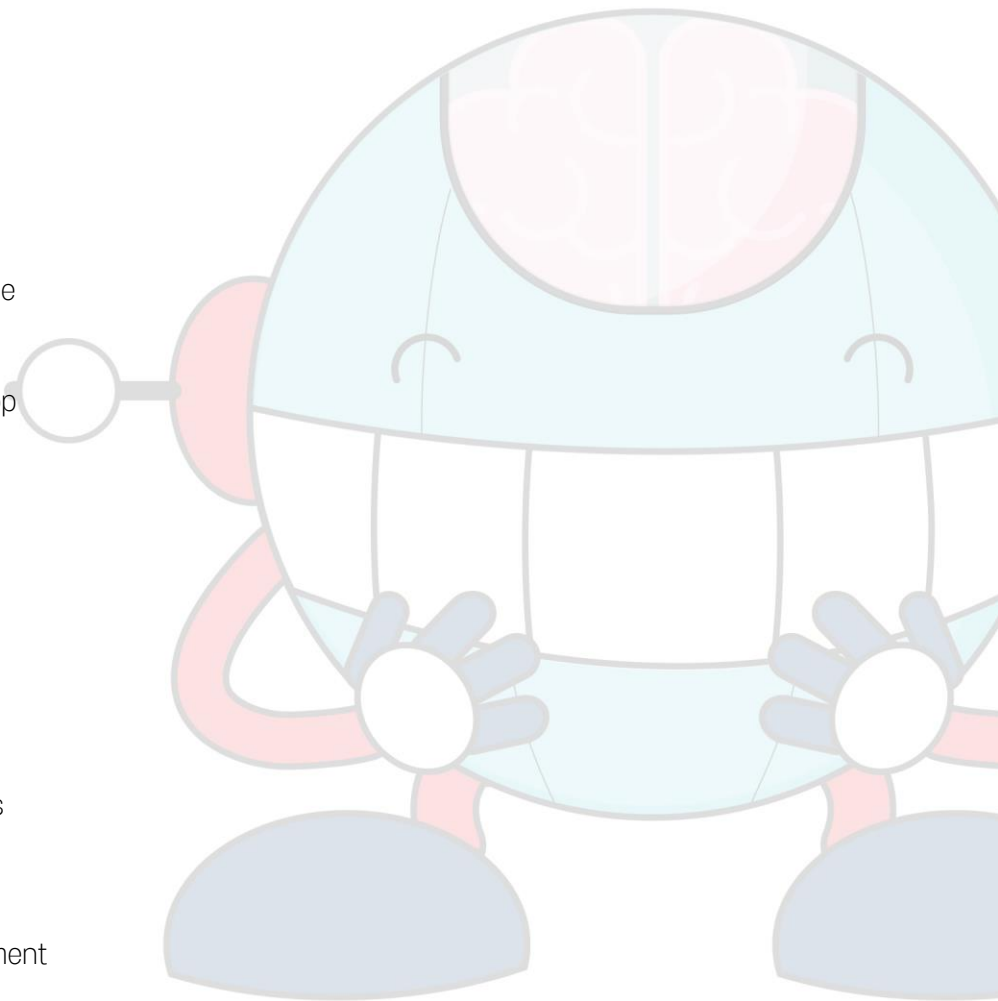
- Installing Data Loader
- Importing Records with Data Loader
- Updating Records with Data Loader
- Deleting Records with Data Loader
- Exporting Records with Data Loader
- Adding a Field in the Schema Builder
- Scheduling a Data Export
- Creating and Using Sandbox
- Mass Transferring Records
- Reporting Snapshots
- Working with Tags
- Quiz
- Case Study
- Case Study Demo
- Key Takeaways
- Conclusion

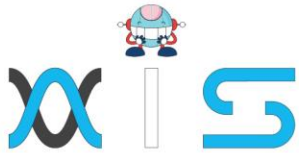
Lesson 19 - AppExchange

- Introduction to AppExchange
- AppExchange
- AppExchange Overview
- Finding and Selecting an App
- Finding a Developer
- Finding a Consultant
- Quiz
- Case Study
- Case Study Demo
- Key Takeaways
- Conclusion

Lesson 20 - Communities

- Introduction to Communities
- Communities
- Creating a New Community
- Topic Management
- Recommendations Management
- Reputation Management
- Adding Members





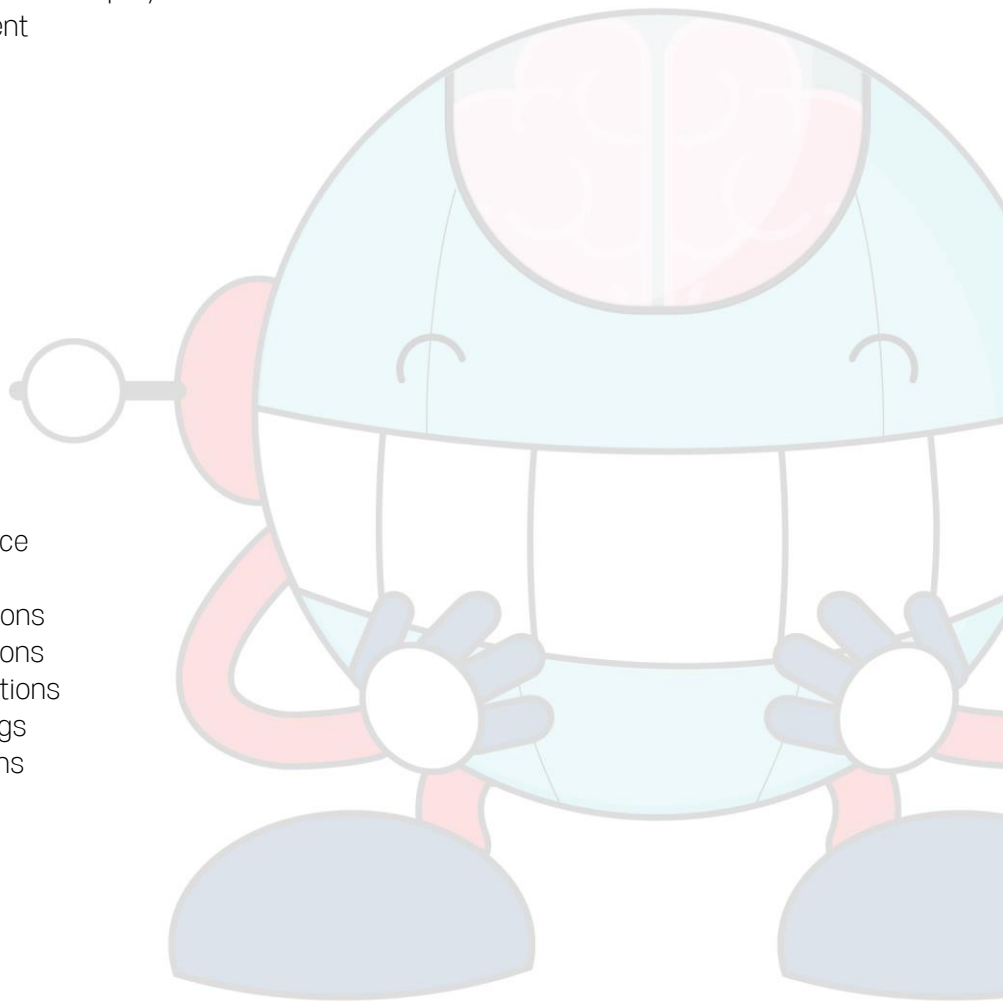
- Managing Tabs and Branding
- Login and Registration
- Community Preferences
- Quiz
- Case Study
- Case Study Demo
- Key Takeaways
- Conclusion

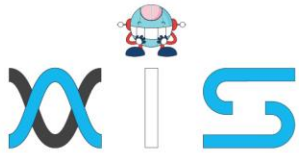
Lesson 21 - Change Sets and Deployment

- Introduction to Change Sets and Deployment
- Change Sets and Deployment
- Outbound Change Sets
- Inbound Change Sets
- Deployment Settings
- Deployment Status
- Eclipse IDE
- Quiz
- Case Study
- Case Study Demo
- Key Takeaways
- Conclusion

Lesson 22 - User Interface

- Introduction to User Interface
- User Interface
- User Interface General Options
- User Interface Sidebar Options
- User Interface Calendar Options
- User Interface Name Settings
- User Interface Setup Options
- Quiz
- Case Study
- Case Study Demo
- Key Takeaways
- Conclusion





Lesson 23 - Application Lifecycles

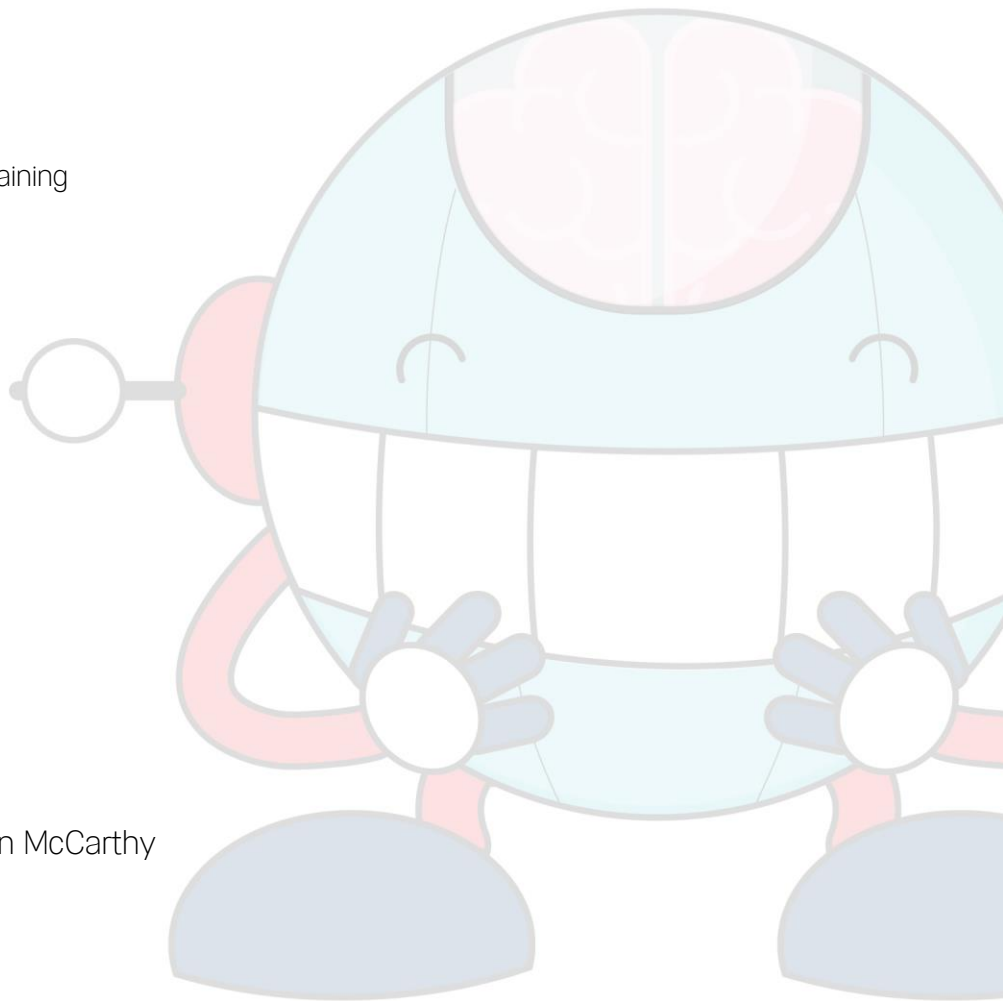
- Introduction to Application Lifecycles
- Application Lifecycles
- Key Milestones and Considerations
- Using Sandboxes for Development
- Using Change Sets
- Using Unmanaged Packages
- Quiz
- Case Study
- Case Study Demo
- Key Takeaways
- Conclusion

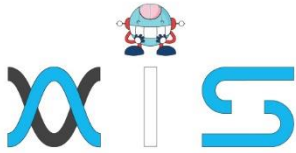
Lesson 24 - Help and Training

- Introduction to Help and Training
- Help and Training
- Using Answers
- Using Ideas
- Searching for a Help Topic
- Contacting Support
- Trust Site
- Known Issues
- Quiz
- Case Study
- Case Study Demo
- Key Takeaways
- Conclusion

Practice Projects

Project Management App by Ben McCarthy





AIS

With the rising demand in scalable technology, AIS provides tailored goal-setting based on your organization's needs and expectations. With products geared towards the growing needs of your organization's customers and employees, AIS has innovative and value-driven solutions.

Learning Partners



SAS Management, Inc.

SAS Management, Inc. has been a leader in the training, certification and consulting services industry in the Philippines. With offices in Makati, Ortigas and Cebu, Philippines, the company has been the top training and consulting company for over 9 years. In its years of existence, it has provided certificates to over 100,000 professionals including 10,000 participants in the 160+ courses that have been conducted just during the 2020-2021 pandemic alone. The most sought-after courses being offered are ITIL, Project Management Professional (PMP)®, COBIT 5, Six Sigma Yellow Belt, Six Sigma Green Belt, PRINCE2, and organizational skills, among others.



Simplilearn

Simplilearn, based in California and India, is the world's #1 online bootcamp and one of the world's the leading certification and training providers. Simplilearn trained over 2,000,000 professionals with 2,000+ trainers and provides over 400 different courses.

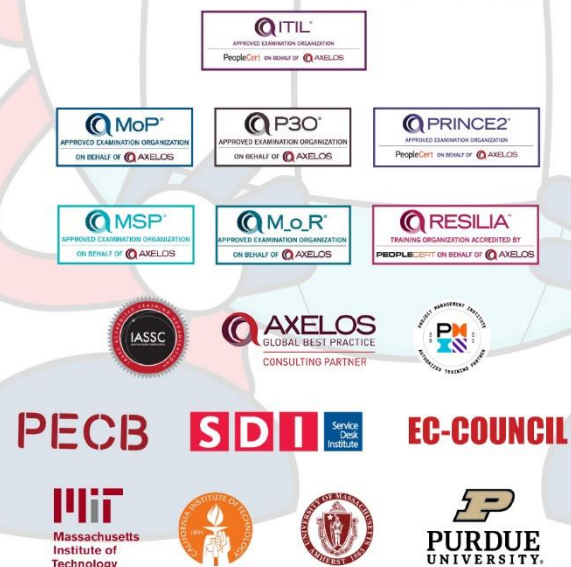
Technology Partner

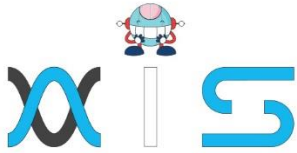


Freshworks

With over 40,000 customers, Freshworks is a business solutions software provider with products ranging from IT helpdesk and service desk, customer relationship management, live chat, marketing automation, phone system, and HR.

Partners & Affiliates





The program presented, as well as a wide range of programs are products of the partnership of AIS, SAS Management, Inc., and Simplilearn. With a common goal of providing the best practice of facilitating learning with an array of choices available in the online platform in this time of digitization.

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