Salesforce Basics Training Syllabus

CorporateSpace CRM Academy

Hands-On Training for Aspiring Salesforce Professionals

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https://corporatespace.in/salesforce-basic-training

Contents

1 Course Overview **3**
- 1.1 Course Objectives . . . 3
- 1.2 Course Duration . . . 3
- 1.3 Target Audience . . . 3
- 1.4 Prerequisites . . . 3

2 Module 1: Introduction to Salesforce Platform **3**
- 2.1 Overview of Salesforce . . . 3
- 2.2 Salesforce Data Model . . . 4

3 Module 2: Declarative Automation **4**
- 3.1 Workflow Rules . . . 4
- 3.2 Process Builder . . . 4
- 3.3 Flow Builder . . . 4
- 3.4 Lab: Automation Setup . . . 4

4 Module 3: Salesforce Security and Sharing Model **4**
- 4.1 Security Fundamentals . . . 4
- 4.2 Implementing Security . . . 4
- 4.3 Lab: Security Configuration . . . 5

5 Module 4: Building Custom Objects and Validation Rules **5**
- 5.1 Custom Objects and Fields . . . 5
- 5.2 Validation Rules . . . 5
- 5.3 Lab: Custom Object Creation . . . 5

6 Module 5: Introduction to Apex Programming and Triggers **5**
- 6.1 Apex Basics . . . 5
- 6.2 Triggers . . . 5
- 6.3 Lab: Apex and Triggers . . . 5

7 Module 6: Reports, Dashboards, and Data Management **6**
- 7.1 Building Reports . . . 6
- 7.2 Creating Dashboards . . . 6
- 7.3 Data Management . . . 6
- 7.4 Lab: Reporting and Data . . . 6

8 Module 7: Deploying Salesforce Applications **6**
- 8.1 Application Deployment . . . 6
- 8.2 Salesforce AppExchange . . . 6
- 8.3 Lab: App Deployment . . . 6

9 Module 8: Real-Time Project: Building a Sales/Service Cloud App **7**
- 9.1 Project Overview . . . 7
- 9.2 Implementation . . . 7
- 9.3 Project Deliverables . . . 7

10 Module 9: Career Development and Certification **7**
- 10.1 Building a Salesforce Portfolio . . . 7
- 10.2 Certification and Support . . . 7

11 Course Materials and Tools **7**
11.1 Provided Resources 7
11.2 Tools Covered 8

12 Program Delivery Options **8**
12.1 Training Formats 8
12.2 Customization for Corporate Teams 8

13 Instructor Profile **8**

1 Course Overview

This Salesforce Basics Training program equips participants with foundational skills to navigate, configure, and develop on the Salesforce platform. Through hands-on labs, real-world projects, and expert-led instruction, learners will master declarative automation, data modeling, reporting, and introductory Apex programming. The curriculum aligns with Salesforce Certified Administrator and Platform App Builder standards, preparing participants for CRM roles in sales, marketing, and support industries.

1.1 Course Objectives

- Navigate and configure the Salesforce platform effectively.
- Build custom objects, fields, and automation workflows without heavy coding.
- Understand Salesforce security, sharing models, and data management.
- Create reports, dashboards, and deploy applications using Salesforce tools.
- Develop a functional Sales or Service Cloud application through a real-time project.

1.2 Course Duration

- Total: 25–30 hours
- Format: Live sessions (onsite, online via Zoom/Google Meet, or hybrid)
- Schedule: Flexible, including weekend batches for corporate teams

1.3 Target Audience

- Aspiring Salesforce Administrators and Developers
- Professionals from CRM, Sales, or IT transitioning to Salesforce
- Students (BBA, BCA, MCA) pursuing Salesforce certifications
- Startups and SMBs implementing Salesforce CRM

1.4 Prerequisites

- Basic computer skills and familiarity with business processes.
- No prior coding experience required, though basic programming knowledge is helpful for Apex modules.

2 Module 1: Introduction to Salesforce Platform

2.1 Overview of Salesforce

- Role of Salesforce in cloud-based CRM
- Salesforce ecosystem: Sales Cloud, Service Cloud, Marketing Cloud
- Navigating the Salesforce interface: Setup, App Launcher, and Home

2.2 Salesforce Data Model

- Understanding objects, records, and fields
- Standard vs. custom objects
- Relationships: Lookup, Master-Detail, and Junction objects

3 Module 2: Declarative Automation

3.1 Workflow Rules

- Automating business processes with workflow rules
- Configuring actions: Email alerts, field updates, tasks

3.2 Process Builder

- Creating automated processes with Process Builder
- Defining criteria, actions, and immediate vs. scheduled actions

3.3 Flow Builder

- Building complex automation flows
- Screen flows, auto-launched flows, and record-triggered flows
- Best practices for flow design and optimization

3.4 Lab: Automation Setup

- Creating a workflow rule for lead assignment
- Building a process in Process Builder for opportunity updates
- Designing a simple flow for user interaction

4 Module 3: Salesforce Security and Sharing Model

4.1 Security Fundamentals

- Profiles, permission sets, and roles
- Organization-Wide Defaults (OWD) and sharing rules
- Field-level security and record access

4.2 Implementing Security

- Configuring user profiles and permission sets
- Setting up role hierarchies and sharing rules
- Managing public groups and manual sharing

4.3 Lab: Security Configuration

- Setting up a secure data model for a sample organization
- Testing access controls and visibility settings

5 Module 4: Building Custom Objects and Validation Rules

5.1 Custom Objects and Fields

- Creating custom objects for business-specific needs
- Defining custom fields: Text, Number, Picklist, Formula
- Configuring page layouts and record types

5.2 Validation Rules

- Ensuring data integrity with validation rules
- Writing validation formulas for common use cases
- Debugging and testing validation rules

5.3 Lab: Custom Object Creation

- Building a custom object for a business process
- Adding fields, validation rules, and page layouts

6 Module 5: Introduction to Apex Programming and Triggers

6.1 Apex Basics

- Introduction to Apex: Salesforce's programming language
- Syntax, variables, loops, and SOQL queries
- Writing simple Apex classes and methods

6.2 Triggers

- Understanding Apex triggers: Before and After events
- Writing triggers for automation beyond declarative tools
- Best practices for trigger development

6.3 Lab: Apex and Triggers

- Writing an Apex class to automate a business rule
- Creating a trigger for record updates
- Testing Apex code in a Developer Org

7 Module 6: Reports, Dashboards, and Data Management

7.1 Building Reports

- Creating tabular, summary, and matrix reports
- Using filters, groupings, and custom formulas
- Scheduling and sharing reports

7.2 Creating Dashboards

- Designing dashboards for business insights
- Adding charts, gauges, and tables
- Sharing dashboards with teams

7.3 Data Management

- Importing/exporting data with Data Loader
- Using SOQL for data queries
- Maintaining data quality and deduplication

7.4 Lab: Reporting and Data

- Building a report for sales performance
- Creating a dashboard for key metrics
- Importing sample data using Data Loader

8 Module 7: Deploying Salesforce Applications

8.1 Application Deployment

- Introduction to Salesforce sandboxes and deployment
- Using change sets for deployment
- Version control with GitHub for Salesforce projects

8.2 Salesforce AppExchange

- Exploring and installing apps from AppExchange
- Evaluating apps for business needs
- Managing installed apps and dependencies

8.3 Lab: App Deployment

- Deploying a custom object and automation to a sandbox
- Installing and configuring an AppExchange app

9 Module 8: Real-Time Project: Building a Sales/Service Cloud App

9.1 Project Overview

- Designing a Sales or Service Cloud application
- Defining business requirements and use cases

9.2 Implementation

- Creating custom objects, fields, and relationships
- Configuring automation with Flow Builder and Process Builder
- Building reports and dashboards for stakeholders
- Applying security and sharing settings

9.3 Project Deliverables

- Functional Sales or Service Cloud application
- Documentation of configurations and automations
- Project codebase hosted on GitHub

10 Module 9: Career Development and Certification

10.1 Building a Salesforce Portfolio

- Crafting a resume with Salesforce project highlights
- Showcasing the project codebase on GitHub
- Preparing for Salesforce Administrator or Platform App Builder certifications

10.2 Certification and Support

- Earning a CorporateSpace Salesforce Basics Certificate
- 30 days of post-training doubt-solving and project support
- Job and internship references (on request)

11 Course Materials and Tools

11.1 Provided Resources

- Comprehensive course slides and cheat sheets
- Access to recorded sessions for review
- Sample Salesforce configurations and code snippets
- Templates for project documentation

11.2 Tools Covered

- Salesforce Developer Org (free sandbox environment)
- Visual Studio Code with Salesforce Extensions
- GitHub for version control and project hosting
- Data Loader for data management
- Postman for API testing
- Salesforce AppExchange for app exploration

12 Program Delivery Options

12.1 Training Formats

- Onsite: At your company premises
- Online: Live sessions via Zoom/Google Meet
- Hybrid: Weekend batches for flexible learning

12.2 Customization for Corporate Teams

- Tailored modules based on company CRM needs
- Flexible scheduling for team availability
- Integration with company-specific Salesforce use cases

13 Instructor Profile

- Certified Salesforce Developer and Consultant with over 6 years of experience
- Delivered training to 15+ corporate teams globally
- Expertise in Salesforce configuration, automation, and Apex development