Salesforce Certified Platform Foundations Training

Duration: **2 Day**

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Overview

The Salesforce Certified Platform Foundations course is designed as an introductory program for **Trailblazers with 0-6 months of Salesforce experience**.

The course focuses on developing the foundational knowledge needed to understand the Salesforce environment. Participants will explore what a Customer Relationship Management (CRM) platform is, how CRM technology is used, and the types of business requirements it can address. They will also examine how the Salesforce product suite can help transform and automate business teams and processes.

The program is also designed to prepare participants for the**Salesforce Certified Platform Foundations** exam. This certification enables individuals who are developing a Salesforce career to demonstrate their foundational skills and knowledge.

Through hands-on experience, participants will become familiar with the Salesforce learning ecosystem by completing activities such as setting up a Trailblazer ID and earning their first Trailhead badges. These activities provide a starting point for continuing to build expertise across the Salesforce platform.

Prerequisites

There are no specific prerequisites for attending this course.

Outline

Module 1 – Support within the Salesforce Ecosystem

In this module, participants will:

- Explore the different resources available to support Salesforce learning.
- Identify Salesforce Customer 360 product offerings and understand appropriate situations for using them.

Module 2 – Salesforce in Action

In this module, participants will:

- Explore how organizations use Salesforce.
- Identify the fundamental approach to customizing Salesforce.

Module 3 – Salesforce Navigation

In this module, participants will:

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- Learn where users can locate the information they need and how to navigate the Salesforce platform.
- Understand where Salesforce customization activities take place.

Module 4 – Object Relationships

In this module, participants will:

- Develop an understanding of the relationships between Salesforce objects.

Module 5 – Data Visibility

In this module, participants will:

- Understand the fundamental concepts associated with Object Access.
- Identify methods that can be used to control Data Visibility.

Module 6 – Data Integrity

In this module, participants will:

- Explore how organizations begin customizing Salesforce to meet their requirements.
- Identify some of the methods used to maintain Data Quality.

Module 7 – Reports and Dashboards

In this module, participants will:

- Explore the basic concepts of Salesforce Reporting.
- Develop an understanding of Dashboard fundamentals.

Module 8 – Roles and Careers within Salesforce

In this module, participants will:

- Identify some of the key project roles involved in a Salesforce rollout.
- Explore career opportunities where Salesforce skills can be applied.

By the End of the Course

Participants will have developed a foundational understanding of the Salesforce platform, CRM concepts, Salesforce Customer 360, platform navigation, object relationships, data access and visibility, data quality, reporting, and dashboards.

The course also introduces key roles and career opportunities within the Salesforce ecosystem, providing participants with a foundation from which they can continue developing their Salesforce knowledge and platform expertise.