talent stacker

SALESFORCE ASSOCIATE

Certification Course

talentstacker.com

welcome to the talent stacker

SALESFORCE ASSOCIATE CERTIFICATION COURSE

Welcome to the Salesforce Associate Certification Course brought to you by the Talent Stacker Career Development Program! This free course is intended to prepare individuals for passing the Salesforce Associate Certification and provide a high-level overview of the platform for those interested in a Salesforce career. If you are brand new to Salesforce - this is a great place for you to start.

We are excited to welcome you to the Salesforce ecosystem and get started on this journey together.

- The Talent Stacker Team

LET'S HIT THE TRAIL

course overview

Click Sections to Navigate to Page

talent stacker

MODULE 1
INTRODUCTION & LEARNING MATERIALS

Lesson 1: Welcome to the Associate Certification
Lesson 2: Creating a Trailhead Account
Lesson 3: The Pacing Guide
Lesson 4: Study Guide Template

MODULE 1: INTRODUCTION & LEARNING MATERIALS

Lesson 1: Welcome to the Associate Certification

Click to Play
Lesson Video

Over the next few lessons, we will cover the primary learning objectives for the Salesforce Associate Credential:

- How the CRM platform solves the challenge of connecting departments and customer data
- Types of business challenges that can be solved by Salesforce Customer 360
- Key Salesforce platform terms
- Fundamental functionality in the current version of Salesforce at a foundational level, such as requirements gathering, reporting, security, sharing, customization, and data management.

We will also provide useful resources to support your learning and studying endeavors along the way! Linked resources in body text are denoted in pink.

Lesson 2: Creating a Trailhead Account

Click to Play Lesson Video

The first step to take on your Salesforce journey is to sign up for a Trailhead account. Trailhead is Salesforce's free online learning platform and community. Everything you need to know about configuring Salesforce can be found here.

TO GET STARTED ON TRAILHEAD

- Open your browser and go to **Trailhead.com**
- Click Sign Up in the top right and fill in your information as accurately as possible.
- Once you sign up you will be sent a Single Use Verification Code, check your email and fill it in and you will now be logged in to Trailhead!
- You can work on setting up your Trailhead profile - this is the place that keeps track of all of your credentials and achievements.

Trailhead is a great place full of tons of helpful information! For this course however, we want to focus on our first certification - the **Associate Certification.**

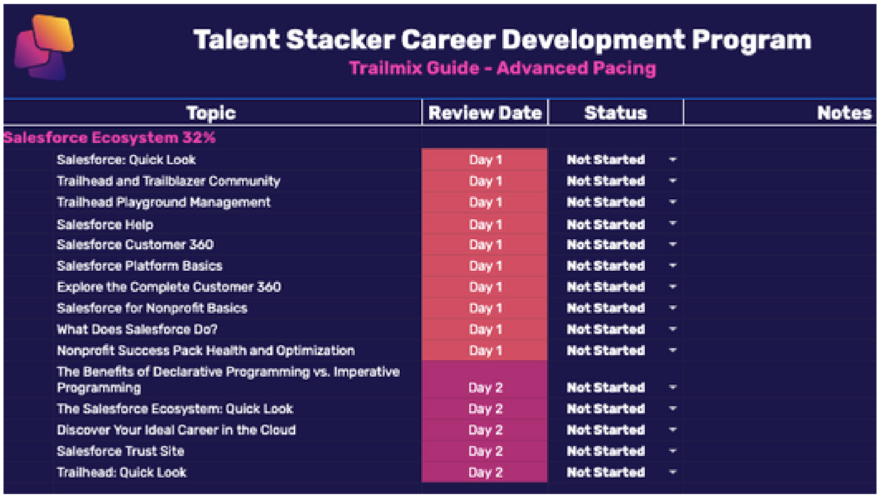
ASSOCIATE CERTIFICATION MATERIALS

You will want to go to Credentials on the Navigation Bar > Certifications > **Associate Certification.**

Here you will find everything you need to know regarding the Salesforce Associate Credential. A few things to highlight and bookmark include:

- **Exam Guide** - This provides you with all the parameters of the exam and what will be expected on the certification exam.
- **Prepare for Your Salesforce Associate Credential Trailmix** - This is a compilation of all of the modules and links that will provide hands-on and knowledge preparation for the exam.
- **Salesforce Associate Certification Prep Module** - Once you have completed the Trailmix, this module will give you a final preparation on questions to expect on the exam.
- **Schedule Now** - This link will take you to the Kryterion website where you can schedule the exam either online or in-person at a testing facility near your location. The exam cost is $75.

Lesson 3: The Pacing Guide



Talent Stacker Career Development Program

Trailmix Guide - Advanced Pacing

Topic	Review Date	Status	Notes
Salesforce Ecosystem 32%			
Salesforce: Quick Look	Day 1	Not Started	
Trailhead and Trailblazer Community	Day 1	Not Started	
Trailhead Playground Management	Day 1	Not Started	
Salesforce Help	Day 1	Not Started	
Salesforce Customer 360	Day 1	Not Started	
Salesforce Platform Basics	Day 1	Not Started	
Explore the Complete Customer 360	Day 1	Not Started	
Salesforce for Nonprofit Basics	Day 1	Not Started	
What Does Salesforce Do?	Day 1	Not Started	
Nonprofit Success Pack Health and Optimization	Day 1	Not Started	
The Benefits of Declarative Programming vs. Imperative Programming	Day 2	Not Started	
The Salesforce Ecosystem: Quick Look	Day 2	Not Started	
Discover Your Ideal Career in the Cloud	Day 2	Not Started	
Salesforce Trust Site	Day 2	Not Started	
Trailhead: Quick Look	Day 2	Not Started	

Click to Create Copy of Google Sheet

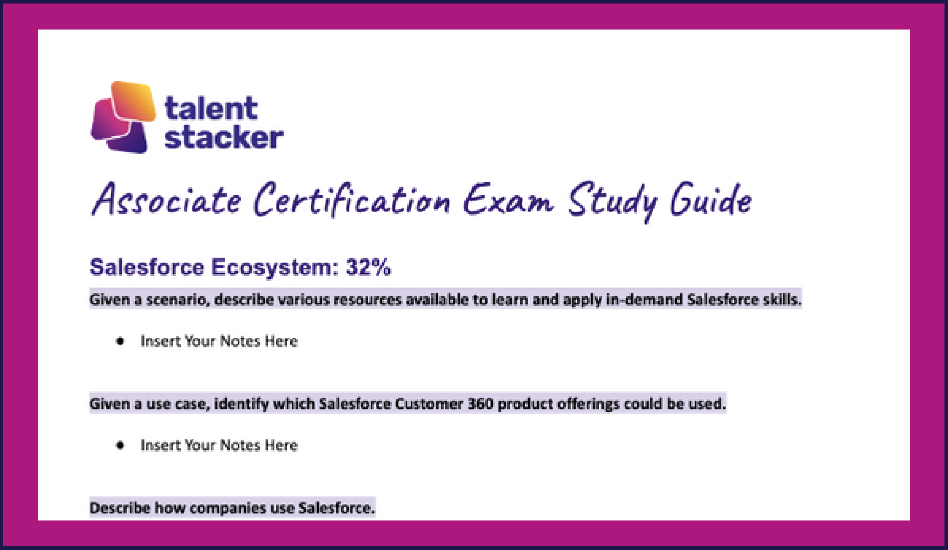
We know what you might be thinking - 32 hrs and 50 minutes of learning material in the Prepare for Your Associate Credential Trailmix! How will I ever get through it?!

Here at Talent Stacker, we are committed to providing you tools for success throughout your Salesforce Journey - so we have created this helpful pacing guide so that you can take this one step at a time.

We have two guiding paths depending on the tempo you would prefer to take. The **Aggressive Pace** will help you complete the Trailmix in 5 days. Whereas the **Intermediate Pace** will schedule you to complete the Trailmix in 4 weeks. Remember, these are just guidelines to help you track your progress and can be adjusted to meet your needs.

MODULE 1: INTRODUCTION & LEARNING MATERIALS

Lesson 4: Study Guide Template


talent stacker

Associate Certification Exam Study Guide

Salesforce Ecosystem: 32%

Given a scenario, describe various resources available to learn and apply in-demand Salesforce skills.

- Insert Your Notes Here

Given a use case, identify which Salesforce Customer 360 product offerings could be used.

- Insert Your Notes Here

Describe how companies use Salesforce.

Click to Create Copy of Google Doc

The Salesforce Certification Exams can cover quite a bit of content – learning how to effectively take notes now will be critical to your success not only on this exam but for future exams. For some people, hand written notes are helpful – but it can be slow going and lengthen the process.

Keeping your notes in a Word document or Google doc can be helpful in adding diagrams or iterating on your notes as you learn more. We invite you to copy and use this template below of the Associate Exam Outline to fill in as you go.

There are other great note taking tools like **Notion** that can help you organize your study materials too! Choose the note taking method that works best for you and stick with it.

MODULE 2
WELCOME TO THE SALESFORCE ECOSYSTEM

Lesson 1: What is Salesforce?
Lesson 2: Customer 360
Lesson 3: What is Trailhead?
Lesson 4: Careers in the Cloud

MODULE 2
WELCOME TO THE SALESFORCE ECOSYSTEM

LEARNING OBJECTIVES

This module prepares you for the Salesforce Ecosystem section of the Salesforce Associate exam, which makes up 32% of the overall exam.

- Given a scenario, describe various resources available to learn and apply in-demand Salesforce skills.
- Given a use case, identify which Salesforce Customer 360 product offerings could be used.
- Describe how companies use Salesforce.
- Differentiate between various job roles and career paths in the Salesforce ecosystem.

Lesson 1: What is Salesforce?

Click to Play Lesson Video

THE HIGH-LEVEL OVERVIEW

Salesforce is a cloud-based Customer Relationship Management Platform or CRM for short. This technology helps companies manage their relationships and interactions with customers and potential customers – whether it's managing Accounts and Contacts or Sales Opportunities and Service Requests – Salesforce allows companies to have a single source of truth or a "360 view" of their customers or clients.

Not only that but it supports the ability to streamline processes, connect multiple systems, and automate where needed to improve business efficiency and success. Because you have all of your client data in one place you can quickly create reports and helpful dashboards to make data informed decisions that move your company forward.

SALESFORCE SOLUTIONS TO NOTE

- **Multitenant Environment:** Multitenacity, is when a single application serves multiple organizations. Essentially Salesforce provides a core set of services to all customers in the multitenant cloud. No matter the size of the business, everyone gets access to the same computing power, data storage, and core features.

- **Declarative vs. Imperative Programming:** One of the true benefits of Salesforce is that it is customizable through declarative programming - or "clicks, not code." This means that businesses don't necessarily need to hire someone to code solutions - which can be cost and time prohibitive. Salesforce's declarative interface allows quick, drag and drop functionality to create unique, scalable solutions.

- **Clouds to Support Your Business:** Depending on a businesses individual needs, Salesforce has several standard, out-of-the box tools and services called "clouds." The six major types of clouds are: Sales Cloud, Marketing Cloud, Commerce Cloud, Service Cloud, Experience Cloud, and Analytics Cloud. Beyond the core clouds, there are nine additional types of clouds in Salesforce for specific applications and industries.

- **AppExchange:** While the individual clouds all have varying functionality to meet business needs - often there is a need to extend functionality of the Salesforce system - this is where the AppExchange comes into play. Similar to the Apple App Store or Google Play, the AppExchange is a cloud computing marketplace through which end users can access, download, and install software apps and packages to extend the functionality of Salesforce.

Lesson 2: Customer 360

Click to Play Lesson Video

Often companies have a disconnected view of their customers. The Sales team tracks customers using one system, while the Customer Service and Marketing teams use entirely different systems - none of which communicate with each other. This is inefficient for both the company and for the customer.

Salesforce solves this problem through its Customer 360 approach. Since all of the clouds are interconnected - users are able to better engage customers across departments by connecting and centralizing customer data from marketing to sales to service, and everything in between. With this "single source of truth" employees are able to use this data to meaningfully and effectively engage with customers.

MODULE 2: WELCOME TO THE SALESFORCE ECOSYSTEM

Lesson 3: What is Trailhead?

Click to Play
Lesson Video

Now the amazing thing about Salesforce – is that because there is such high demand for Salesforce as a product and professionals to manage the product in the space, Salesforce had to make it really straightforward to learn and get certified. To do this, they created their own customized learning portal called Trailhead.

Trailhead is a free, gamified online learning community where you can learn everything you need to know about the Salesforce system itself. You earn badges and points – while you work in hands on orgs called Playgrounds to learn the ins and outs of configuring Salesforce. In this lesson, we are going to highlight how to successfully navigate the Trailhead platform.

YOUR TRAILHEAD BOOKMARKS

- **Trailblazer.me Profile:** When you sign up for a Trailhead account, you will automatically receive a Trailblazer.me profile. Your profile is a running account of your Trailhead and Salesforce accomplishments. Here you will find your certifications, badges earned, skills, and details. You can also track your community engagement, connections, and so much more!

- **Learn Tab:** From trails to projects and everything in between - under the Learn Tab is where you can navigate all of the primary learning materials to support your journey as a Salesforce professional. If you know what you are looking for, you can also use the search bar at the top of the Trailhead interface.

- **Credentials Tab:** Under the Credentials Tab you will find both Superbadges and Salesforce Certification material. Superbadges allow Trailblazers to test their skills against real-world business challenges. Certifications are the baseline qualifications to be a Salesforce professional. This course is preparing you for the Associate level certification!

- **Community Tab:** One of the things you might notice, if you haven't already, is that community is paramount in the Salesforce Ecosystem. The Salesforce community is known throughout the ecosystem as the "Ohana." The Community Tab is a great place to get involved in the Salesforce community. Here you can interact and collaborate with other Trailblazers on your journey, participate in fun quests and events, and find community groups near you.

- **Trailhead Go App:** The Trailhead Go App allows you to take your Salesforce learning and community on the road. **Download the Trailhead Go App Here.**

Lesson 4: Careers in the Cloud

Click to Play Lesson Video

It is estimated that approximately 4.2M jobs will be created in the Salesforce ecosystem by 2024. Couple that with significant income potential and lifestyle design - and **there is no better time than NOW to embark on a Salesforce Career**. There are several paths to choose from, take a moment to explore them here:

Salesforce Administrator
Salesforce Developer
Salesforce Architect
Salesforce Consultant
Salesforce Designer

Business Analyst
Marketing Careers
Sales Careers
Service Careers

Click role titles for more info

Source: IDC White Paper Sponsored by Salesforce, “The Salesforce Economic Impact: 4.2 Million New Jobs, $1.2 Trillion of New Business Revenues from 2019 to 2024,” October 2019

Check Your Understanding

1

Anthony is the Salesforce Administrator for Careers-R-Us. This company uses both Sales and Service Cloud to manage their sales pipeline and support their customers. Recently, users have been asking for a functionality outside of the standard Sales and Service cloud functions. Where might Anthony look first to find a solution?

A. Trailhead Academy

B. AppExchange

C. Salesforce Help

2

Anita is new to the Salesforce Ohana and looking for potential career paths to explore. She thrives on identifying key insights from data and turning those insights into actionable recommendations and ultimately a successful business strategy. Which Salesforce career path would you recommend Anita look into?

A. Salesforce Administrator

B. Salesforce Consultant

C. Business Analyst

3

One of the true benefits of Salesforce is that the platform is customizable through "clicks, not code." What type of programming is this?

A. Declarative

B. Supportive

C. Imperative

Answers: (1) B (2) C (3)A

MODULE 3
FINDING YOUR WAY - NAVIGATING SALESFORCE

Lesson 1: The Front End of the Platform
Lesson 2: Behind the Setup Cog
Lesson 3: Additional Functionality

MODULE 3
FINDING YOUR WAY - NAVIGATING SALESFORCE

LEARNING OBJECTIVES

This module prepares you for the Navigation section of the Salesforce Associate exam, which makes up 28% of the overall exam.

- Given a scenario, identify how a user can locate and access necessary information.
- Given a scenario, identify where Salesforce customization takes place.

MODULE 3: FINDING YOUR WAY - NAVIGATING SALESFORCE

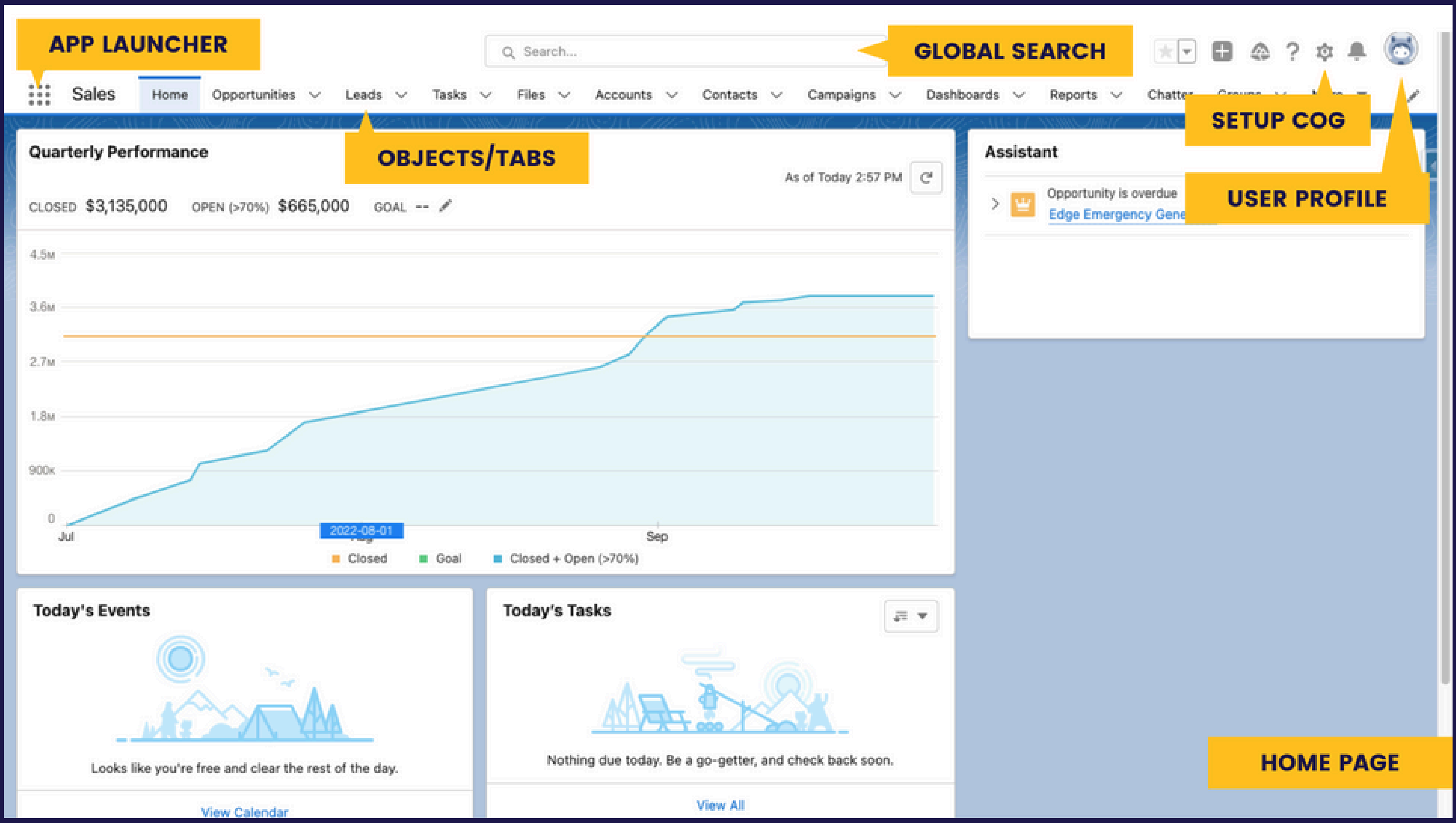
Lesson 1: The Front End of the Platform

Click to Play Lesson Video

So now that we know a bit more about what Salesforce is - let's dive into what it can do!

For this lesson, we are going to get the grand tour of the front end of Salesforce or what a user might see when they login to the platform for the first time. We will cover how they can access the information needed to successfully support their customers and business.

Below we have outlined specific areas to remember that are discussed in this lesson. Don't forget, Salesforce is highly customizable to meet business needs, so though we are going to cover the standard product structure, not all Salesforce instances may look exactly like this.



HOME PAGE OVERVIEW

- **App Launcher:** The app launcher is where you will find all of the Apps available in your Salesforce instance. An App is a collection of items (Objects, Tabs, Pages, Utilities, etc.) that work together to serve a particular function. Some of the apps that often come standard are the Sales App and the Sales Console App. Using the Lightning App Builder, custom Apps can be created for a business to meet different needs.

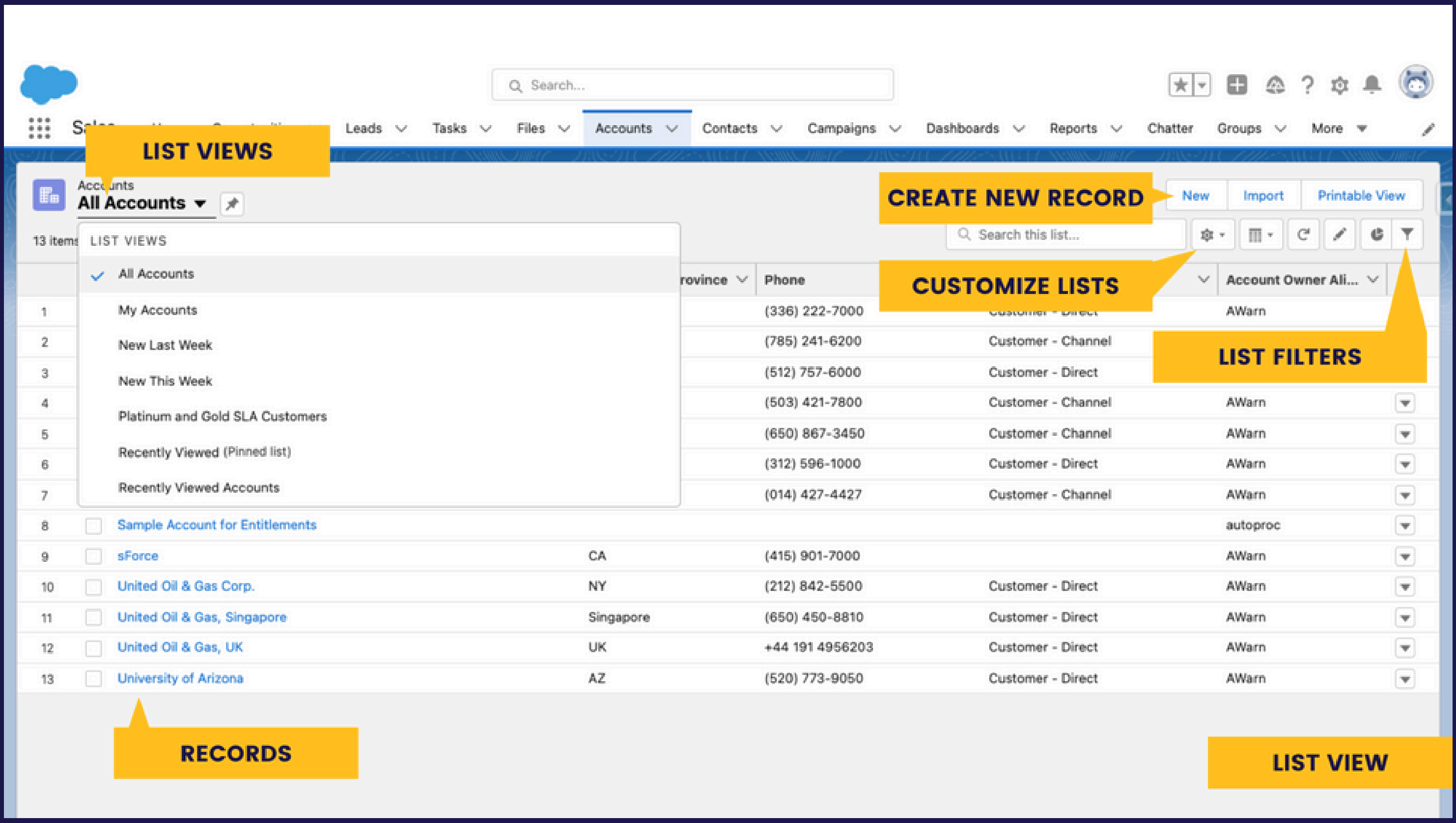
HOME PAGE OVERVIEW {CONT}

- **Objects/Tabs:** An Object, represented by the tabs on the navigation bar, are containers for information or records. They are similar to a spreadsheet in Excel or Google Sheets. They hold all of the information for a particular part of the business - such as Accounts or Contacts. There are objects, called Standard Objects, that come out-of-the-box (Accounts, Contacts, Opportunities, etc.). Objects can also be customized in a Custom Object depending on a business need or process.

- **Global Search:** The search bar at the top of the page is called the Global Search. This allows you to search your entire database or filtered portions of your database easily and effectively.

- **User Profile:** Every individual that has access to your company's Salesforce instance is known as a user. They have a profile that defines their preferences, security levels, and more.

- **Setup Cog:** The view that we are seeing now is considered the "front end" of Salesforce. However, remember that the power of Salesforce is that it is highly customizable! This is where this little Setup cog comes in. For users with appropriate access and permissions (most often a Salesforce Administrator), the Setup cog is where they access "under the hood" of the company's Salesforce platform and can customize almost every aspect of what users see and interact with on the front end.



LIST VIEW OVERVIEW

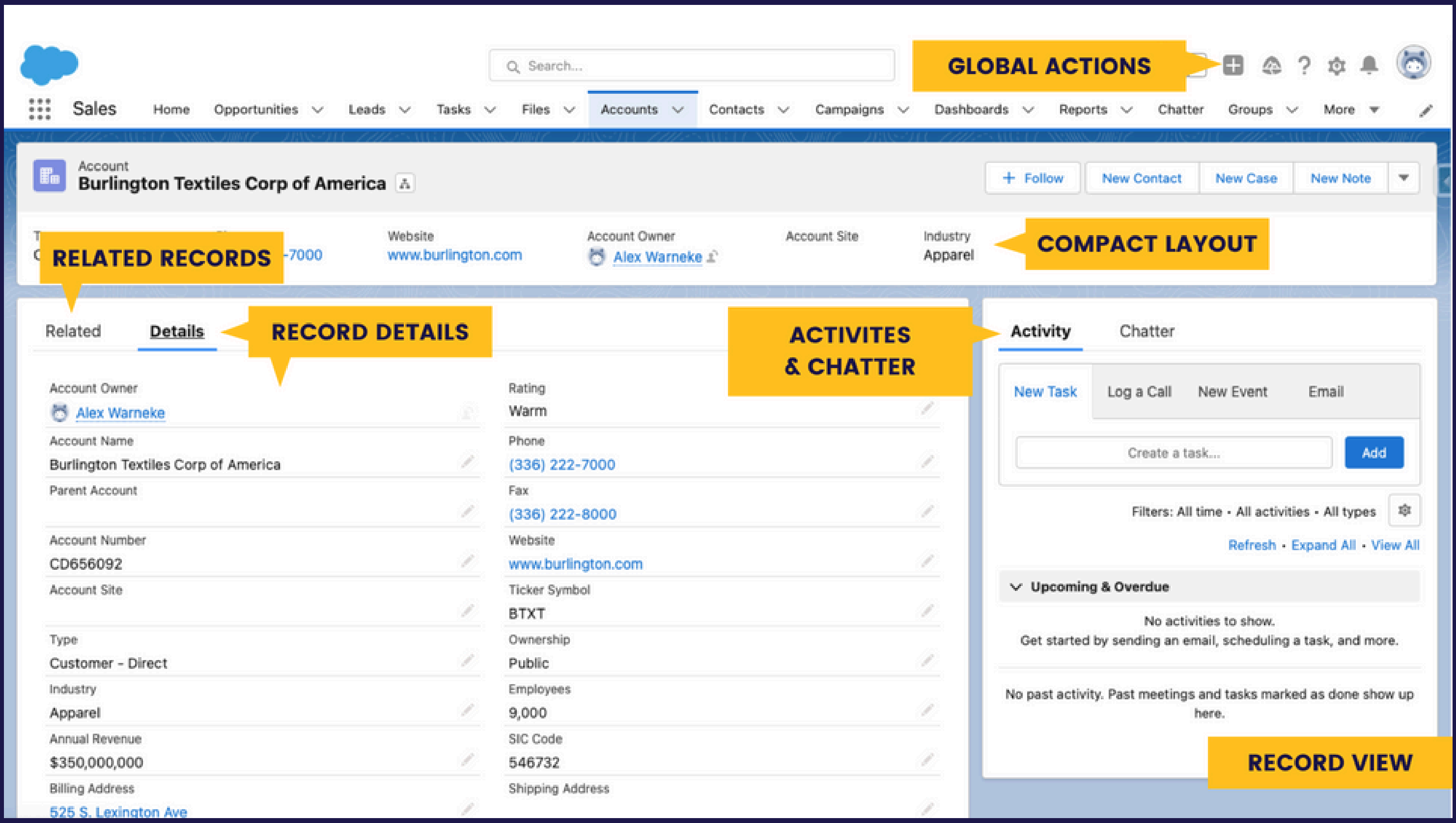
- When you click on one of the Objects/Tabs on the navigation bar. You will be brought to that Objects associated **List View**. Remember, in Salesforce, we think about database tables as objects, we think about columns as fields, and rows as records. So instead of an account spreadsheet or table, we have an Account object with fields and a bunch of identically structured records. With the **List View** - each row is a specific **record**, while the columns represent a subset of fields from that record.

LIST VIEW OVERVIEW {CONT}

- **Customize Lists & List Filters:** These two buttons allow you to adjust the fields you might see in a particular view (**Customize List**) and filter out records based on different criteria (**List Filters**). You can then save these views so that they are able to be accessed again, allowing users to easily sort the records they need to see regularly.

- **Create New Records:** From the List View, you can easily add new records to the current object you are on by using the "Create New Records" button.

Lightning Experience vs. Salesforce Classic: You might notice throughout your studies, references to Salesforce Classic. Salesforce Classic is the previous iteration of the Salesforce Platform. While some companies do still utilize the Classic interface, there is a large-scale transition in place towards the new interface known as Lightning Experience. For the purpose of this course, all functionality referenced is within Lightning Experience. To learn more, please visit: **How to Transition to Lightning Experience.**



RECORD VIEW OVERVIEW

- After you create a new record for a particular Object or navigate to an existing record from the List View or Global Search - you will be brought to the **Record View.** Though the record view might have several of the same components, they might not necessarily be in the same spots or order as they are on this diagram - remember everything can be customized to meet business needs!

- **Record Details:** To return to our spreadsheet metaphor, remember the Object is the spreadsheet itself. The Record is the individual rows on the spreadsheet and the Record Details would be the information for each record, or the columns on the spreadsheet. Here these columns are represented by fields in the record detail.

RECORD VIEW OVERVIEW {CONT}

- **Related Records:** One of the great things about Salesforce is you can effectively connect the different objects together so you don't have to duplicate information. This is done through Related Records. For example, a specific Account might have multiple Contacts. You can relate each of those contacts to the one account. Through these relationships, we are able to get a connected, 360 view of our business.

- **Compact Layout:** The compact layout represents fields in the record detail that might be helpful to have at the top of the record. The fields in this highlight box can be configured and arranged by a Salesforce Administrator.

- **Activities:** When working with a specific record, there might be specific events that a user would like to log - a follow up task, an email sent, a call made, etc. Each of these activities can be logged directly on the record. What's better is that once they are logged, they are present on the record in the Activity Timeline so that other users are aware of what is going on with this particular record.

- **Chatter:** Chatter is a native collaboration tool within Salesforce. Similar to social media outlets, users can post for internal users or even external customers in some instances to see. Other users can respond, like, or follow the posts as well as add links or files. A Chatter feed can include tracking record updates to ensure that users stay up-to-date on key record changes.

- **Global Actions:** Global Actions allow you to create records, send emails, assign tasks, etc. for other records, without leaving the current record you are on.

MODULE 3: FINDING YOUR WAY - NAVIGATING SALESFORCE

Lesson 2: Behind the Setup Cog

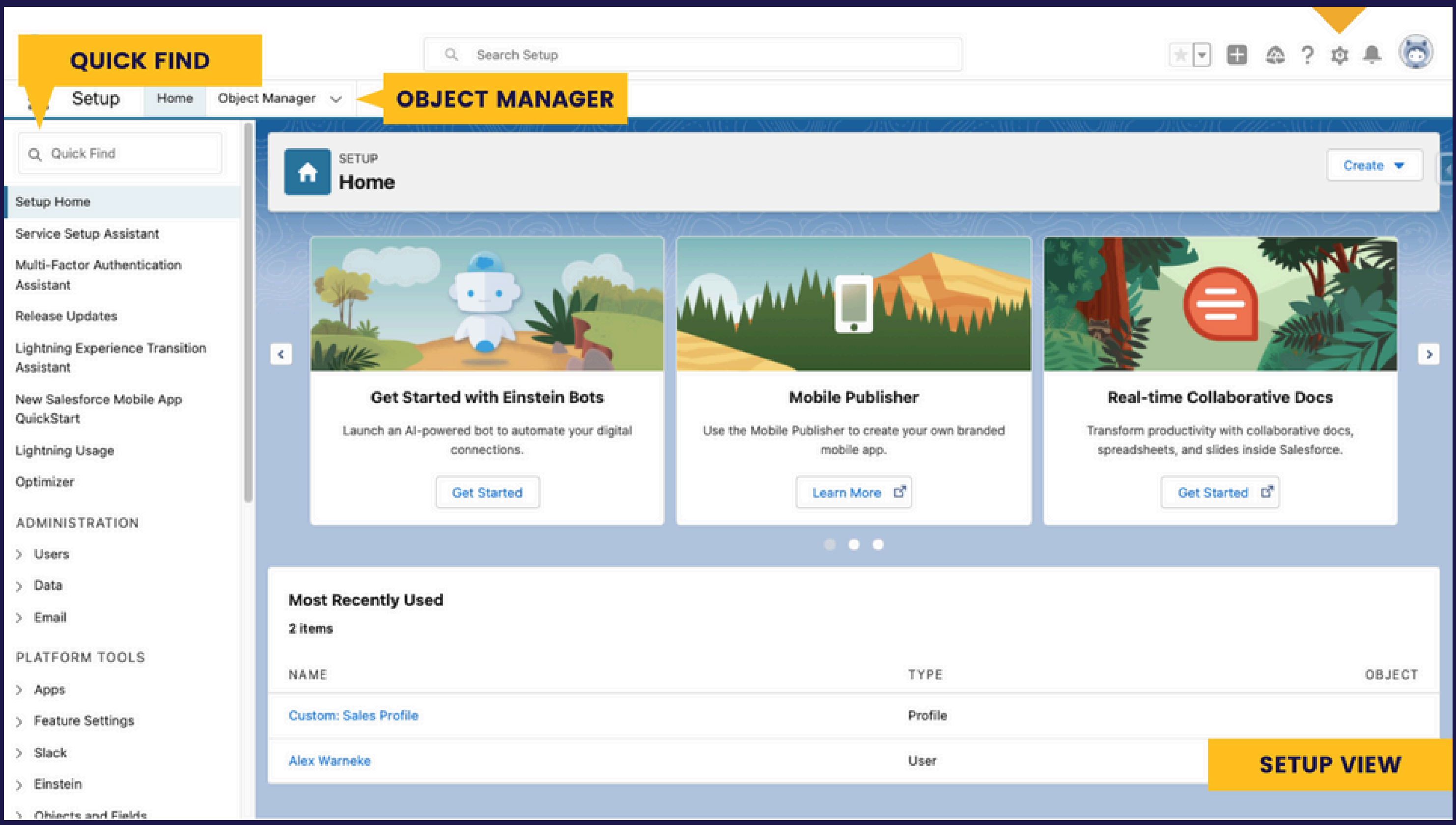
Click to Play Lesson Video

Now that we know our way around the front end of Salesforce, it's time to look under the hood!

In this lesson we will be getting a peek into the backend of Salesforce by way of the Setup Cog. This is where Salesforce Administrators and other Salesforce Professionals (Consultants, Developers, etc.) can customize Salesforce to meet specific business needs. Though we can't cover it all in this course, below we have outlined areas to remember that are discussed in this lesson.

From the front end of Salesforce, access the Setup View by clicking the Setup Cog in the top Right hand corner. Depending on security access, the Setup Cog might not be visible to all users in a Salesforce org. This is okay! Not everyone should have access to customize and adjust Salesforce. Usually only System Administrators or Delegated Administrators are able to access Setup.

Lesson 2: Behind the Setup Cog

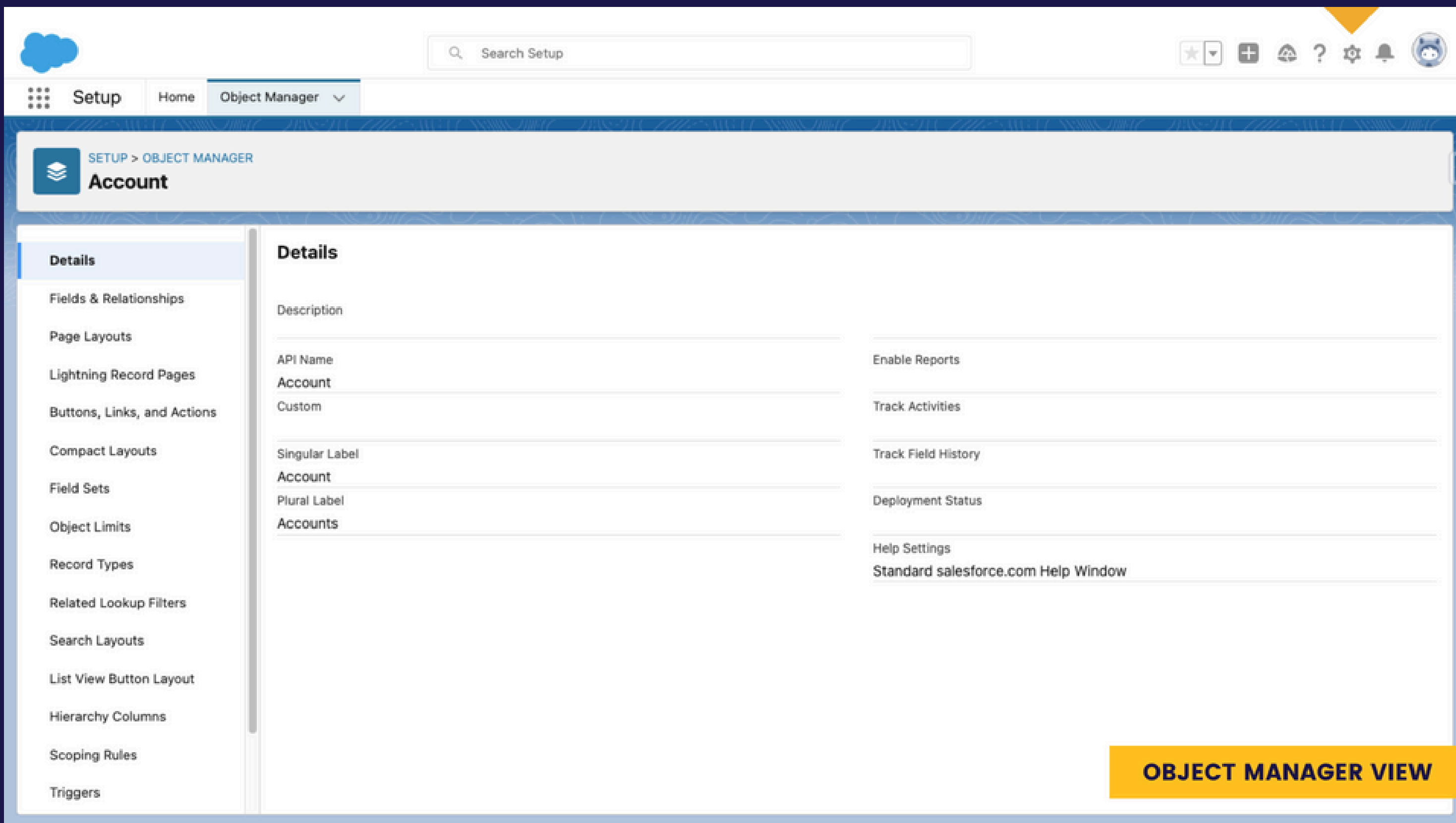


SETUP VIEW OVERVIEW

- **Quick Find:** In the Quick Find Search, you can navigate to almost all customizable functionality. From here you can define the Salesforce Security Framework, Manage Users, Create Automations, and so much more! To dive deeper into the customization of Salesforce, we recommend exploring the **Salesforce Administrator Certification.**

- **Object Manager:** All the objects housed within your Salesforce instance can be found and customized within the Object Manager tab.

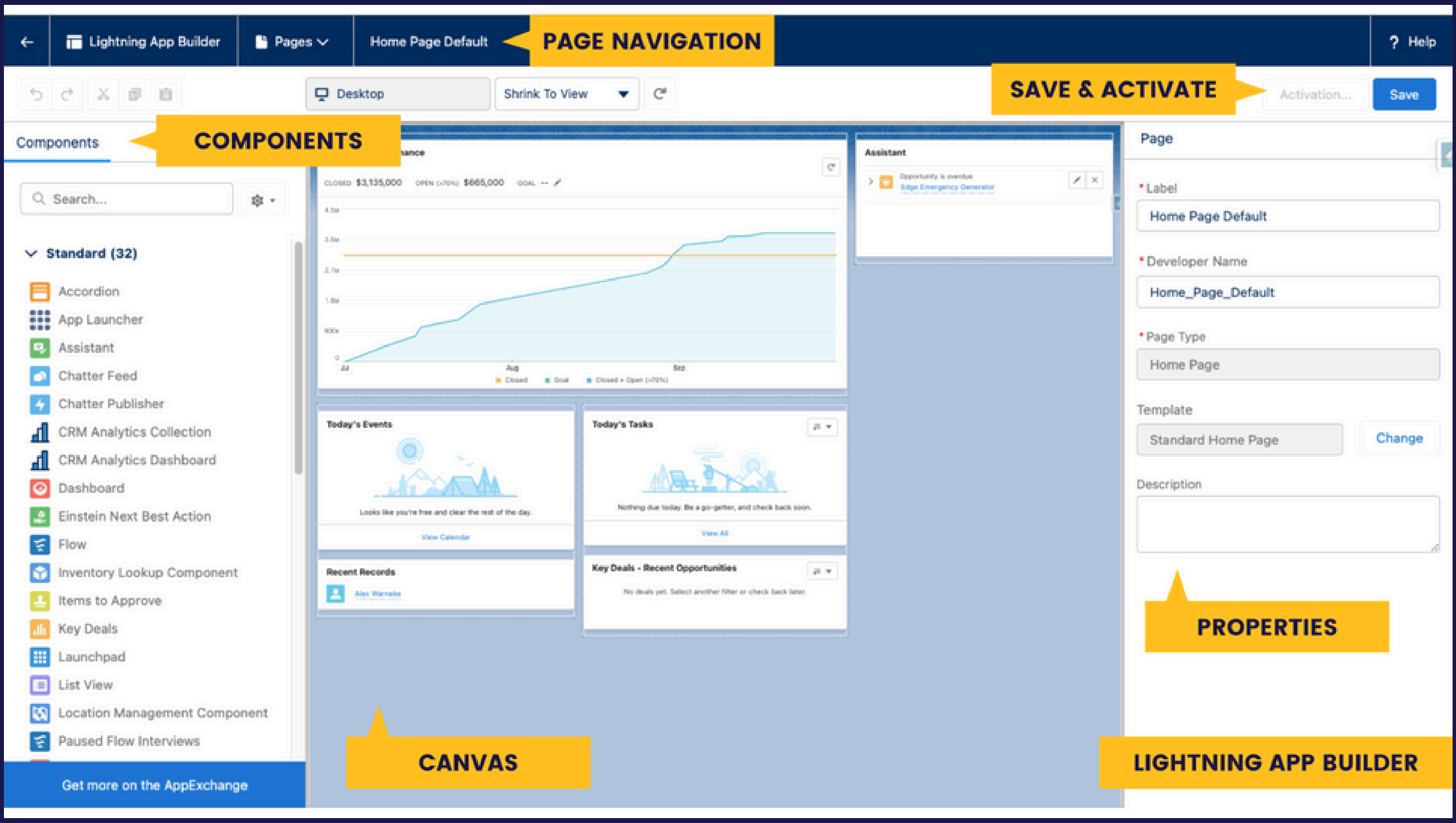
Lesson 2: Behind the Setup Cog



OBJECT MANAGER OVERVIEW

- After selecting a specific object from the Object Manager or creating a Custom Object, you will be brought to the Object customization page. Here you will see all customizable functionality associated with that specific object.

- Under the Object Manager View you can create or customize fields and relationships, you can adjust page and compact layouts, create actions, buttons, and data validations. The Object manager is the hub of customization for the objects within your Salesforce org.



LIGHTNING APP BUILDER OVERVIEW

- Another important behind-the-scenes tool is the Lightning App Builder. The Lightning App Builder is a point-and-click tool that makes it easy to create custom pages (App Pages, Home Pages, And Record Pages) for Lightning Experience and the Salesforce mobile app. This tool can be accessed in a few ways, but one of the primary ways is by typing in “Lightning App Builder” in the Quick Find Search.

LIGHTNING APP BUILDER OVERVIEW {CONT}

- **Page Navigation:** When you're working on a Lightning page, the header shows you its label, and contains a Pages list where you can see the last 10 pages that you modified. You can also return to Setup without saving or to view more help for the Lightning App Builder. If you're editing an app, the header also shows the app name and contains an App Settings tab where you can configure the app's options such as branding, navigation, and the utility bar. In an app context, the Pages list shows all active Lightning pages associated with the current app.

- **Components:** The components pane contains all standard and custom Lightning components that are supported for your Lightning page. Click and drag a component to add it to the page.

- **Canvas:** The canvas area is where you build your page. Drag components to reorder them on the page.

- **Properties:** Depending on what you select on the page, the properties pane shows either the overall page properties or the properties of the component that you've selected. This is where you can customize different aspects of the page you are on or an individual component on that page.

- **Save & Activate:** The Save button allows you to save your customization progress for a particular page. Once the page is ready to deploy to your users - you need to Activate it. Activation allows you to define how the page will be accessed, who will see it, and what form factors it will be available in (Desktop, Mobile, Both).

MODULE 3: FINDING YOUR WAY - NAVIGATING SALESFORCE

Lesson 3: Additional Functionality

Click to Play
Lesson Video

As a Salesforce Professional, there are a few additional tools that you should be aware of to locate helpful information or extend functionality of the Salesforce system.

- **Salesforce Help (Help.Salesforce.com):** Salesforce Help provides access to Salesforce’s library of Help and Training resources, documentation and release notes, Premier features, and Salesforce Support. If you have a question about how something works in Salesforce - this is a great resource for you.

- **Salesforce Trust (Trust.Salesforce.com):** Salesforce Trust is the Salesforce community's home for real-time information on system performance and security. Should you ever have a question about the current status of the system, security, or compliance - this is where you should head first.

ADDITIONAL FUNCTIONALITY {CONT}

- **AppExchange:** The AppExchange is a marketplace run by Salesforce that offers solutions that extend Salesforce functionality. These include apps to install in the Salesforce instance - such as Lightning Components, Bolt Solutions for communities, Flow Solutions to integrate with third-party systems, and Lightning Data. All of these solutions provide out-of the-box options to meet a specific business need, add a piece of functionality, or solve a complex requirement that would require significant administrative or development time. Similar to iTunes or the Google Play store, free or paid add-ons can be downloaded to enhance the Salesforce Instance. The AppExchange enables customers to download, install, evaluate and test, and then purchase based on if the app meets their orgs needs or not. You can often find tons of information regarding the apps and their functionality on the AppExchange.

Check Your Understanding

1 **Justin just transferred from the Sales team to the Customer Service team at Careers-R-Us. He is excited to hit the ground running and support customers. Where might Justin go to locate the Service App in Salesforce?**

A. Global Search

B. Setup Cog

C. App Launcher

2 **The Sales Department at Mountain Apparel has two separate divisions, one that focuses on Accounts in California and the other in Colorado. What would be a straight forward way for Sales Reps to only see the accounts relevant to their geographic region?**

A. Place all of the California Accounts in one object and all of the Colorado Accounts in another object.

B. Create a separate list view for each region and filter the lists by state.

C. When opening an account record, the sales reps will check to make sure that the record is in a region that their division oversees.

3 **A Sales Rep would like to find the contact information for the head of marketing for one of their company accounts - Global Solutions. How might they quickly find this information?**

A. They can look through their pile of Post-it notes next to their computer.

B. Navigate to the Global Solutions Account record in Salesforce and find the Head of Marketing's contact info under the Related Lists.

C. Google it - surely this company has all of the contact information on their website!?

Answers: (1) C (2) B (3) B

MODULE 4
UNDERSTANDING THE DATA MODEL

Lesson 1: How it's All Connected
Lesson 2: Data Security Framework

MODULE 4
UNDERSTANDING THE DATA MODEL

LEARNING OBJECTIVES

This module prepares you for the Data Model section of the Salesforce Associate exam, which makes up 25% of the overall exam.

- Explain the relationship between the core standard objects (account, contact, lead, opportunity, case).
- Given a scenario, determine which feature to use to ensure data visibility.
- Given a scenario, determine which tool to use to ensure data integrity.

MODULE 4: UNDERSTANDING THE DATA MODEL

Lesson 1: How it's All Connected

Click to Play Lesson Video

Over the past two modules, we have covered what Salesforce is and how we can navigate the platform at a high-level. In this section, we are going to get more into the nuts and bolts of how Salesforce is set up and how we keep the data secure.

THE DATA MODEL

One of the primary things to understand as a Salesforce professional is the Salesforce Data Model. In the last module we introduced the concept of Objects or the Tabs at the top of your Salesforce org. As a quick refresh - Objects are containers for information or records. They are similar to a spreadsheet in Excel or Google Sheets. They hold all of the information for a particular part of the business - such as Accounts or Contacts. There are several different kinds of Salesforce objects, but the two we are going to focus on in this course are **Standard Objects** and **Custom Objects**. Standard Objects come out-of-the-box whereas Custom Objects can be customized depending on a business need or process.

THE DATA MODEL {CONT}

Some of the important Standard Objects to be familiar with are:

- **Accounts:** Are used to store information about companies - from where they are located, to the specific industry they represent, to how many people they employ - all of this information can be captured on the Accounts object.

- **Contacts:** Represents an individual associated with an account. Several contact records can be related to one Account. These contacts might include the head of the company represented on that account record, or other individuals who might work there.

- **Opportunities:** This object is where we would store information about open and closed sales deals as well as track sales opportunities in progress.

- **Leads:** The Lead object allows you to track prospective customers. These might be people you need to follow up with or qualify them before you would incorporate them into your larger database. Once you have a qualified lead, this object allows you to directly convert these records into an account and contact, with the option of an opportunity.

- **Cases:** The case object is where we can store and track feedback, questions, and issues from customers. In order to provide the best customer service, cases allow us to have a holistic view of the problems that might arise and how we can efficiently and effectively solve them.

There are several Standard Objects in Salesforce and if there is not a Standard Object that meets your needs, you can create a Custom Object. All of these objects are connected to each other through various types of relationships. One helpful way to see how all of these objects are interconnected in Salesforce is through the **Schema Builder** which can be found in the Object Manager.

CUSTOMIZING OBJECTS

Out-of-the-box Salesforce provides a great range of possibilities, but the standard data model might not always meet a specific business need exactly. The great thing about Salesforce is that it is highly customizable! Here are some of the ways in which you can customize both Standard and Custom Objects.

Field Types: All objects in Salesforce, both standard and custom, come with a few standard fields. In the Object Manager, you are also able to add additional fields from an assortment of field types. Here are a subset of some of the field types you have to choose from:

- **Checkbox** — for fields that are a simple “yes” or “no,” a checkbox field is what you want.
- **Date or DateTime** — these field types represent dates or date/time combinations, like birthdays or sales milestones.
- **Formula** — this special field type holds a value that’s automatically calculated based on a formula that you write.
- **Picklist** — are predefined lists of values where users can select from.
- **Multi-Select Picklist** — are predefined lists of values where multiple values can be selected.

Click here for the full list of field types and their purpose.

Keep in mind when working with fields:

- When it comes to fields - custom fields you can basically customize as you see fit. However, there are some parameters for customizing standard fields.
- Changing the field type on a custom field should be done with caution as it can result in data loss.

CUSTOMIZING OBJECTS {CONT}

Page Layouts: Another way that we can customize Salesforce objects is through page layouts. Page layouts control the layout and organization of fields, buttons, related lists, and more on an object.

With page layouts we can adjust if we want fields to be marked as read-only or required. We can break up the fields into sections so it makes more sense for our users. And most importantly, we can assign different page layouts to different types of security profiles - so that each user only sees the information that is relevant to them.

Record Types: In certain instances, you might use one object to collect somewhat related types of records. For example, a business might have Customer Accounts and Retailer Accounts. These are both Accounts and might have much of the same information collected with the exception of a few fields. In this case you would use Record Types.

Record types allow different picklist values, page layouts, and business processes to be defined for a custom or standard object. So in terms of our example, Customer Accounts might have slightly different picklist values for one field versus the Retailer Accounts, and different page layouts. So this is where a Salesforce Professional would create a record type for each of these types of Accounts.

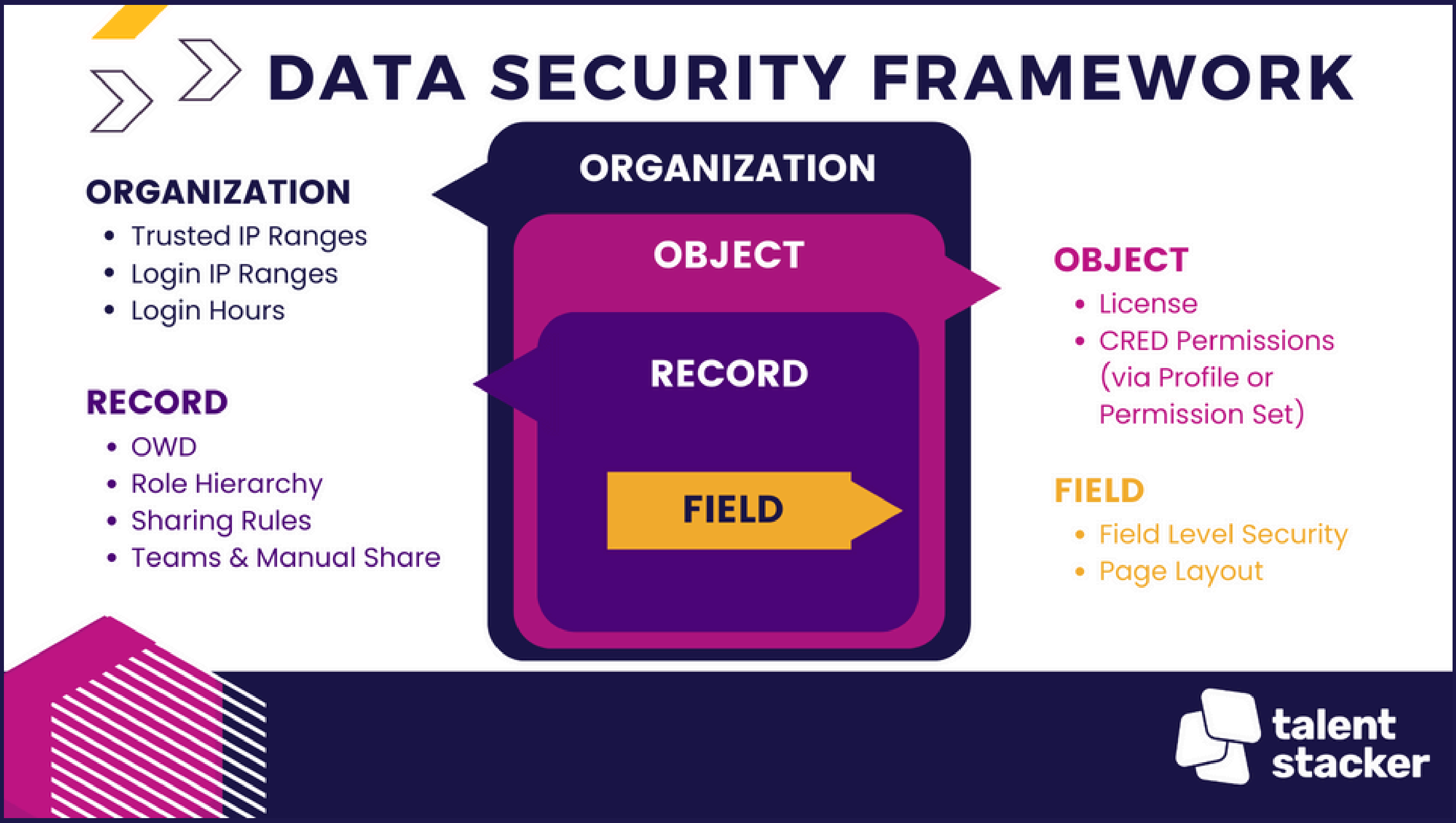
MODULE 4: UNDERSTANDING THE DATA MODEL

Lesson 2: Data Security Framework

Click to Play Lesson Video

In the last lesson, we talked extensively about how data is and can be structured in Salesforce. An equally, if not more important conversation, is how data is protected in Salesforce.

In our modern world, data security is paramount and Salesforce has created a powerful framework to manage who has access to what data and who doesn’t. In this lesson we are going to review the levels of the Salesforce Data Security Framework.



SALESFORCE DATA SECURITY FRAMEWORK

- **Organization Level Access:** The highest level of Salesforce security is focused around who has access to our organization, from where, and when. This access is managed in a few primary ways - **User Logins** (Username/Password), **Login IP Ranges** (Where can users login from), and **Login Hours** (when can users login). There are additional security measures that can be implemented into a Salesforce org such as **Multi-factor Authentication**, **Single Sign-On**, and **Session Settings**.

SALESFORCE DATA SECURITY FRAMEWORK {CONT}

- **Object Level Access:** A few things act in tandem to dictate what a user can see and what they can do in a Salesforce org. First, the **Salesforce License** that is assigned to a user determines what profiles they can have. **Profiles** and **Permission Sets** dictate what a user can see in an org - different system and administration settings - and what they can do - or their Create Read Edit and Delete permissions for objects that they have access to. The profile is what locks these settings down and then permission sets can be used to open them up for certain users or groups depending on the business needs. **Permission Set Groups** can be used to grant access to multiple permissions sets at one time to users.

- **Record Level Access:** While profiles will control what you can see more generally in an org. Access to records you do not own is controlled first and foremost by **Organization Wide Defaults (OWD**). The OWDs are the most restrictive setting and then we start to open up access using a combination of **Role Hierarchies** (vertical access), **Sharing Rules** (horizontal access), and **Manual Sharing**.

- **Field Level Access:** Profiles and permission sets dictate what we can see and do - so they will play a role in field level security, but you can also use things like **page layouts** to hide certain fields from certain profiles or make them "read-only".

For a more in-depth look at the Salesforce Security Model, we recommend the Salesforce Support video series: Who Sees What

DATA INTEGRITY

The questions that can be asked and answered in a Salesforce org, are only as good as the data that it contains. To make sure that this data is as good as it can be, there are a few tools accessible for Salesforce professionals.

- **Default Values:** Default field values automatically insert the value of a custom field when a new record is created. This can be a helpful way to enforce data integrity.

- **System Validations:** System or standard validation rules - include aspects such as universally required or unique fields. Field data type is also a type of system validation in that a user must input an email into an email type field or a currency into a currency type field.

- **Validation Rules:** Validation rules verify that data entered by users in records meets specific standards before the record can be saved. A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of “True” or “False.” When the validation rule returns a value of "True", this confirms that the data entered by the user contains an invalid value. Validation rules can also include error messages to display to users when they enter invalid values based on specified criteria. Using these rules effectively contributes to quality data.

- **Duplicate Rules & Management:** The ability to resolve and prevent duplicate records not only increases user confidence in your data, but also increases the power of your data to accurately inform questions about your business. To support this, Salesforce has standard and custom matching and duplicate rules.

Check Your Understanding

1 **Mountain Apparel is expanding and wants to better serve their customers. Currently, they are tracking client feedback, questions, and apparel issues through an intake form on their website linked to a spreadsheet, but this is not a sustainable solution. What out-of-the-box object would you suggest this company use to track these customer service needs?**

A. Leads

B. Contacts

C. Cases

2 **Tanya is helping to implement the security framework for Careers-R-Us. Management has requested that users do not have access to records that they do not own. Where would Tanya set these baseline security parameters?**

A. Organization Wide Defaults (Sharing Settings)

B. Profiles

C. Session Settings

3 **A Sales Representative is creating a new Contact in Salesforce. They have input the following text into the new contact's Email field: "Sarah(at)cloudysales(dot)com" - When trying to save the record, the Sales Rep is unable to do so and an error message pops up. "You have entered an invalid format." This is an example of what type of data integrity measure?**

A. System Validation

B. Duplication Rule

C. Default Value

Answers: (1) C (2) A (3) A

MODULE 5
CREATING REPORTS & DASHBOARDS

Lesson 1: Asking Important Questions
Lesson 2: Navigating Reports
Lesson 3: Visualizing with Dashboards

MODULE 5
CREATING REPORTS & DASHBOARDS

LEARNING OBJECTIVES

This module prepares you for the Reports & Dashboards section of the Salesforce Associate exam, which makes up 15% of the overall exam.

- Describe reports on Salesforce.
- Describe dashboards on Salesforce.

MODULE 5: CREATING REPORTS AND DASHBOARDS

Lesson 1: Asking Important Questions

Click to Play Lesson Video

We are almost there! In the last three modules we have had a jam packed tour of the Salesforce system - from a basic understanding of how the system works, where to locate critical features to support business success, and how the data is structured and secured. In our final module, we are going to touch on one of the most important aspects of a CRM platform - how to ask and explore questions of the database in a way that drives businesses forward. In Salesforce, we have key tools in the form of Reports and Dashboards that can support this goal.

But before we get there, it's important to mention that these analytical tools are only as good as the questions that we ask and the data that we input. So it must be a priority of all Salesforce Professionals and users that the data is of the highest quality and that we are intentional about the questions we seek to answer prior to creation of reports and dashboards.

MODULE 5: CREATING REPORTS AND DASHBOARDS

Lesson 2: Navigating Reports

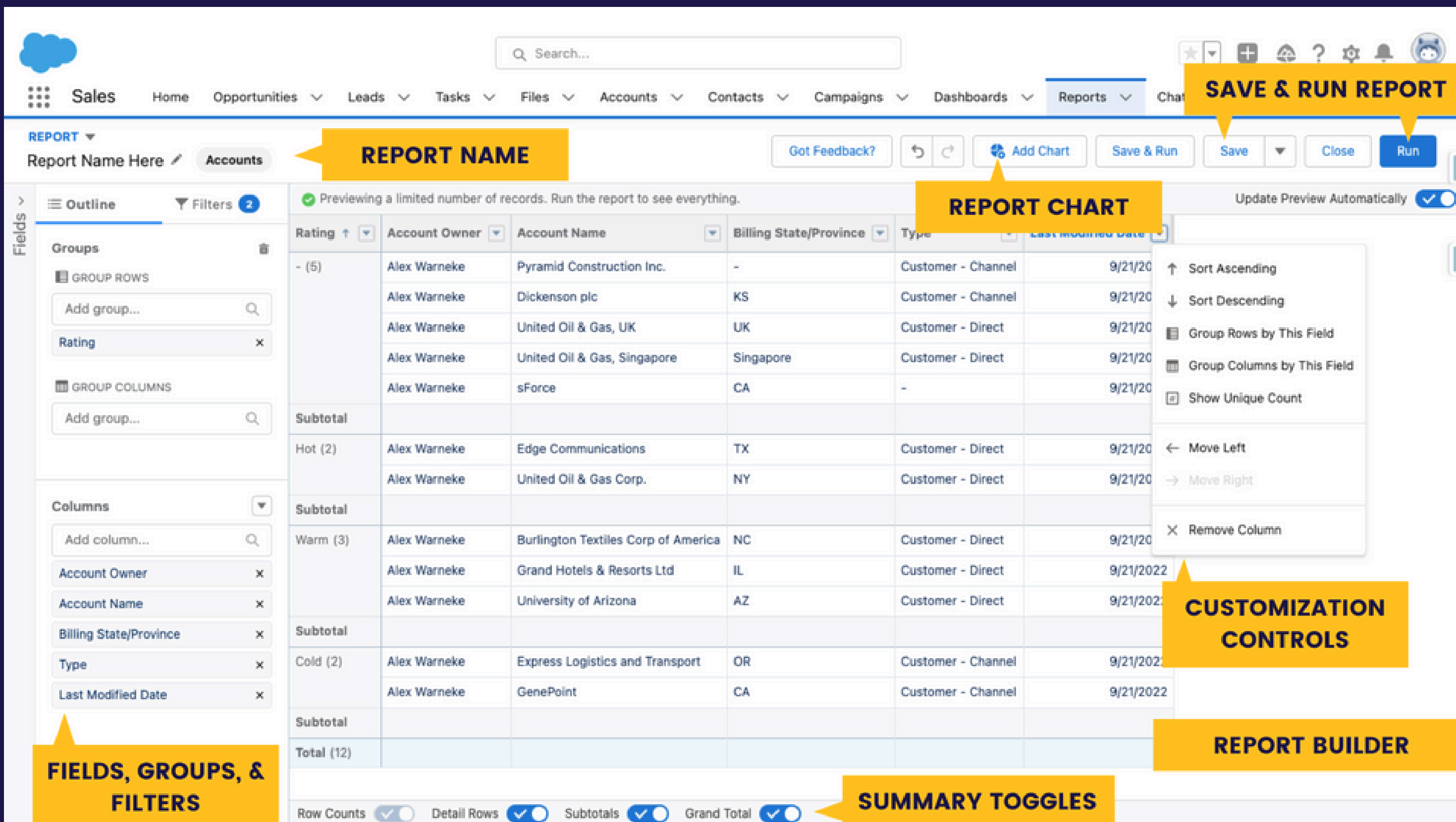
Click to Play Lesson Video

Reports are used to compile information based on object records in Salesforce and on criteria defined by the user. In this lesson we will walk through the basics of how to create a report in Salesforce.

REPORT BUILDING CONCEPTS

- **Report Types:** When you first create a new report in Salesforce, you will be prompted to choose the report type. Report types define what records and fields are available in a report- there are several standard report types in Salesforce, but we can also define custom ones.

- **Report Format:** Based on how records are grouped in Salesforce, there are four primary report formats - Tabular, Summary, Matrix, and Joined.



REPORT BUILDING CONCEPTS {CONT}

- **Report Fields and Groupings:** Within the Outline box on the far left of the report builder, various fields can be added or removed from the report (depending on fields available on the current report type). Additionally these fields can be grouped by row or column.

- **Report Filters:** Report data can be filtered by values such as currency, string, date and more by defining finer criteria on one or more fields.

REPORT BUILDING CONCEPTS {CONT}

- **Report Summaries:** There are a few formulas we can use in a report such as row level formulas and summary formulas. A row-level formula can be created for a report which requires specific information that is not available in a standalone field. Only 1 row level formula can be created per report and it can reference up to 5 unique values. An example of this would be wanting to calculate a “Time to Close” field based of a “Close Date” - “Created Date.” We also have custom summary formulas which allow a formula to be defined on a number, percent, and currency summary field - we have four types of summaries that we can run - sum, avg, max, and min. At least one report grouping is required and up to 5 summary formulas can be defined per report.

- **Report Charts:** Report charts help us provide a visual display of the information in the report. These charts help us make sense of what the data means. There are a few different chart options depending on the data we have and the story we are telling - everything from bar charts - column, line, donut, funnels, and scatter plots. At least one grouping is needed in order to create a report chart.

- **Save & Run:** These buttons allow you to save your progress as you go and run your report once you are ready.

- **Report Folders:** Security for reports and dashboards is maintained by the folder in which they are held. There are three options - View, Edit, and Manage.

- **Additional Security Note:** Org Wide Defaults determine the default visibility to records that users see in reports. Also, sharing rules, manual sharing, and the role hierarchy determine what records users see in reports. Page layouts have no impact on record visibility in reports. A field can be viewed even if it is not visible on a page layout.

REPORT BUILDING CONCEPTS {CONT}

- **Subscribing to Reports:** So now that we have our report built out and some charts - how do we share the data? One way is by report subscriptions. A user can subscribe other users to a report by specifying a user, group, or role. To subscribe users to a report, the user must have access to the folder where the report is stored or located. Report email frequency can be set every daily, weekly, or monthly* at a specific time and the report will be emailed within 30 minutes of the preferred start time. Alternatively you can also set conditions to trigger an email notification at a certain threshold. These reports are sent as an email attachment - with CSV or XLSX file format. **In the video I said weekday and daily twice - it is daily, weekly, and monthly.*

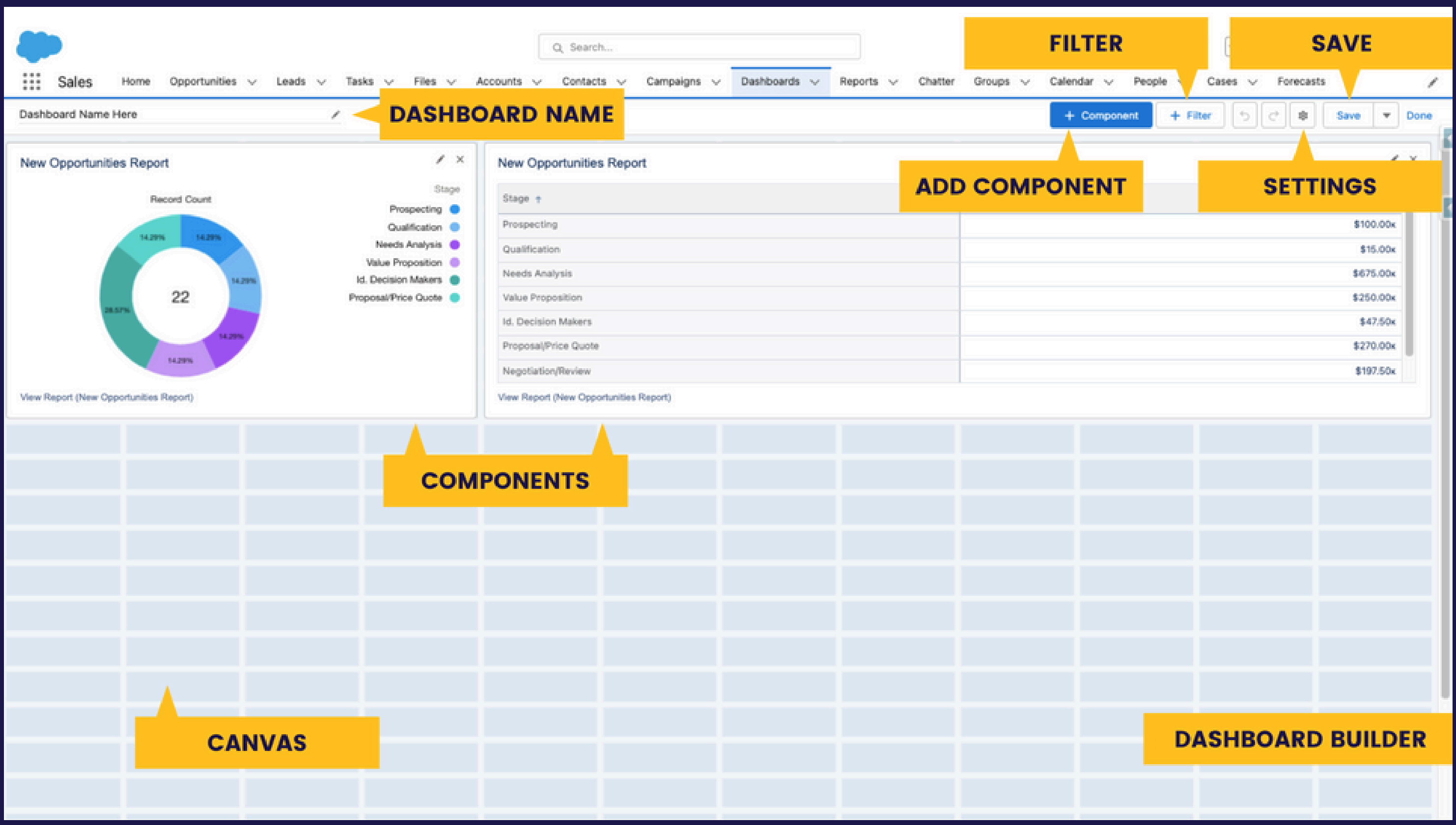
- **Exporting Reports:** Once you have created a report, if permissions allow, they can be exported. Reports can be exported in Lightning Experience in **Formatted Report** or **Details Only view**. The Formatted report exports a report in XLSX file format where visual presentation is maintained and this format is ideal for directly publishing reports to consumers. Whereas Details Only exports a report in XLS, XLSX, or CSV file format which contains the data extract only and is ideal for data cleanup or backup and other data quality or maintenance processes.

Click to Play Lesson Video

Now that we have reports - we can use a dashboard to create a visual representation of the report(s). This makes it easier to quickly and efficiently understand various aspects of the business.

DASHBOARD BUILDING CONCEPTS

- **Dashboard Components:** Data can be visually displayed on a dashboard using dashboard components such as chart, gauge, metric, or table. A report serves as the data source of a dashboard component and displays report data in a format based on the dashboard component type. Various types of charts are available for displaying data using dashboard components such as the ones we already talked about - bar, column, line, donut, funnel, and scatter.



DASHBOARD BUILDING CONCEPTS {CONT}

- **Dashboard Properties:** When sharing dashboards with users, There are two types of dashboards based on the **View Dashboard As** setting that is configured - fixed dashboards and dynamic dashboards. With a fixed dashboard, The View Dashboard As setting is fixed to a specific user, and all viewers will see dashboard data based on the access level of this user. With a dynamic dashboard, data displayed on the dashboard adapts or changes according to the access level of the logged-in user who is currently viewing. A few things to remember regarding dynamic dashboards - there is a limit of 5 dynamic dashboards for Enterprise edition and up to 10 for Unlimited edition. Dynamic dashboards cannot be scheduled to refresh automatically and must be refreshed manually. And Dashboard subscription is disabled or is not supported in dynamic dashboards.

DASHBOARD BUILDING CONCEPTS {CONT}

- **Dashboard Filters:** Data displayed on a dashboard can be filtered based on source report fields to allow users to scope data to a particular view.

- **Dashboard Subscription:** Dashboard subscription works similarly to report subscription. A user can subscribe other users to a dashboard by specifying a user, group, or role. To subscribe users to a dashboard, the user must have access to the folder where the dashboard is stored or located. Dashboard email frequency can be set daily, weekly, or monthly* at a specific time and the dashboard will be emailed within 30 minutes of the preferred start time. **In the video I said weekday and daily twice - it is daily, weekly, and monthly.*

- **Dashboard Refresh:** Dashboards can be manually refreshed, or they can be automatically refreshed daily, weekly, or monthly depending on the schedule set.

- **Dashboard Folders:** Security for reports and dashboards is maintained by the folder in which they are held. There are three options - View, Edit, and Manage.

MODULE 5: CREATING REPORTS & DASHBOARDS

Check Your Understanding

1 **Jonathan is creating a stakeholders report to provide high-level insights on the Mountain Apparel Sales Pipeline. If he would like to export a report from Salesforce that he can place directly in his presentation - which report export format would he choose?**

A. Details Only View

B. Formatted Report

C. Summary Report

2 **The Sales Manager at Careers-R-Us would like to generate a list of contacts for a mailing list. What report format would be the most appropriate to use?**

A. Joined

B. Summary

C. Tabular

3 **A Sales Representative at Mountain Apparel requests access to the new Sales Dashboard. How should the Salesforce Administrator give the Sales Rep access to the dashboard?**

A. Share the dashboard

B. Export the Dashboard

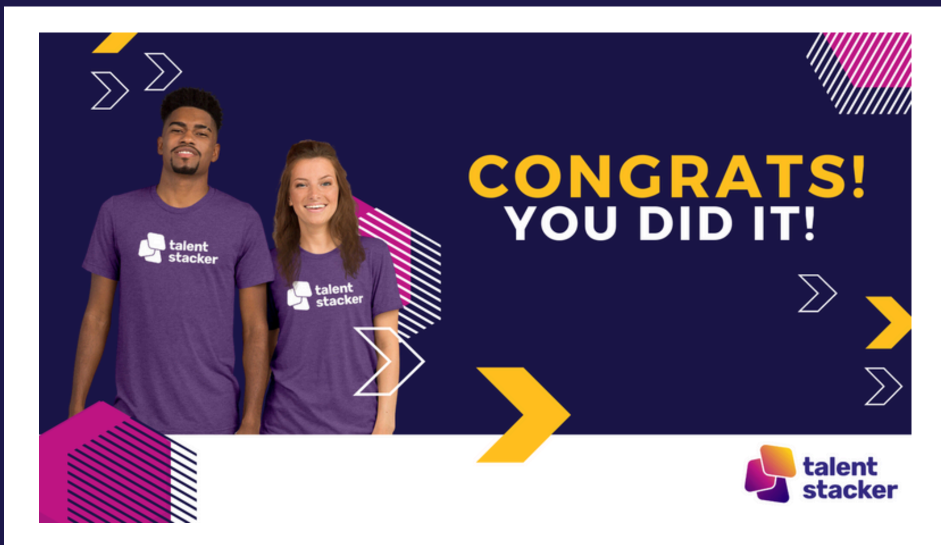
C. Share the Dashboard Folder

Answers: (1) B (2) C (3) C

MODULE 6
CONGRATULATIONS
YOU DID IT!

Lesson 1: You Have Completed the Course
Lesson 2: Sign up for the Exam

Lesson 1: You Have Completed the Course



Click to Play Lesson Video

Congratulations! You have completed the Salesforce Associate Certification Course brought to you by the Talent Stacker Career Development Program!

We hope you have enjoyed this exploration into the functionality of the Salesforce platform and its extraordinary capabilities. And this is just the beginning! To learn more about the many pathways a Salesforce career can take you, we recommend exploring the **Career Paths** overview on Trailhead. Whether you decide to become a Salesforce Administrator or Consultant or Developer - there is truly something for everyone!

BEST OF LUCK TO YOU,
WHEREVER YOU TRAIL MAY LEAD!

MODULE 6: CONGRATULATIONS YOU DID IT!

Lesson 2: Sign up for Exam

Click to Play Lesson Video

SCHEDULE YOUR EXAM

Now’s the time! You have prepared for this. Let’s get your Associate Exam scheduled!

- Create a login at **Kryterion** - This link will take you to the Kryterion website where you can schedule the exam either online or in-person at a testing facility near your location. The exam cost is $75.
- Once you are logged in, click the tab Register for an Exam.
- Expand the + for the Associate Exam, Expand the + for the Salesforce Certified Associate
- You will have the option to either take the course - Online Proctored or Onsite Proctored - depending on your preference.
- Select one option and follow the prompts for scheduling and payment.
- Once scheduled, Salesforce will send additional instructions by email.

Lesson 2: Sign up for Exam

Online Proctored vs. Onsite Proctored?

For Online Proctored: You can usually schedule these to take within the hour, there is lots of availability. You will need to give yourself time to set up your biometrics and download the sentinel software onto your computer. There are pretty specific parameters you must follow when taking the test online and you are not allowed to take notes (though this might be changing soon - where Salesforce will allow a notes screen).

For Onsite Proctored: Your ability to utilize this option will depend on testing areas in your location. Make sure to give yourself plenty of time to get to the testing center and not be rushed. There is often a 10-15 minute check-in process prior to sitting your exam. You will also need to bring identification and your email from Salesforce with your test code. With an onsite proctored exam you are provided paper and pencil for taking notes.

HELPFUL ARTICLES

- **Scheduling an Exam**
- **Accommodations for Certification Exams**
- **Onsite Proctoring - Completing Your Exam at a Testing Center**
- **Online Proctoring - Completing Your Exam Remotely**
- **Retake Policy for Certification Exams**
- **Salesforce Credential and Certification Program Agreement and Code of Conduct**

join talent stacker

NEED ADDITIONAL SUPPORT?

TAKE THE FREE 5 DAY CHALLENGE

Looking to continue your journey as a Salesforce professional and would like support in navigating your next step? We invite you to take the Free Salesforce 5 Day Challenge by Talent Stacker and check out our other Free and Value Add Career Development Resources.

TAKE THE CHALLENGE

SALESFORCE FOR EVERYONE

For everything you need to know about embarking on a Salesforce career - Subscribe to the Salesforce for Everyone YouTube channel or check out our podcast!

YOUTUBE CHANNEL

PODCAST

www.talentstacker.com

talent stacker

LEARN MORE

talentstacker.com
ask@talentstacker.com