ABOUT THE COURSE:

TOTAL DURATION:	45 HRS
MODE OF DELIVERY	Virtual Instructor led by Industry Experts + Physical Session conducted by FDP faculty
TRAINER TO STUDENT RATIO:	1:50
TOTAL MARKS:	75

TABLE 1	
OVERALL COURSE OBJECTIVE:	• Salesforce CRM Fundamentals Learners will analyze the Salesforce architecture and interface options, evaluate when to use Lightning vs. Classic, and configure a free developer environment. They will also apply UI customization concepts to set up themes and company profiles. • Customization and Configuration Learners will design and construct custom objects, fields, tabs, and applications. They will analyze object relationships (lookup, master-detail, many-to-many) and apply interface customization techniques using navigation tools and themes. • Security and Access Control Learners will evaluate organizational security requirements and implement layered access control using profiles, roles, permission sets, and sharing rules. They will analyze field-level and object-level security to support compliance and data protection. • Salesforce Automation Tools Learners will design and build automated business processes using Flow tools (Record-Triggered, Screen, Scheduled, Autolaunched). They will analyze business scenarios to determine the most efficient automation strategy. • Apex Programming Basics

Learners will construct logic-driven solutions using Apex classes, variables, and control structures. They will apply SOQL, SOSL, and DML operations to interact with Salesforce data models programmatically.

- Advanced Apex and Triggers
Learners will develop triggers and implement asynchronous operations (Future, Batch, Queueable, and Scheduled Apex). They will evaluate trigger behavior using context variables and apply best practices to enhance performance and scalability.

- Apex Testing and Integration
Learners will design and execute robust unit tests covering bulk, positive, and negative cases. They will also construct REST and SOAP integrations and evaluate integration reliability and data exchange patterns.

- Introduction to AI and Salesforce AI
Learners will analyze foundational AI concepts such as neural networks, NLP, and generative AI. They will evaluate Salesforce's AI offerings through the Einstein Trust Layer, emphasizing ethical and responsible AI usage.

- Agentforce and Prompt Builder
Learners will develop prompt engineering solutions using Prompt Builder and apply best practices to create intelligent automation within Agentforce. They will evaluate prompt effectiveness and improve interactions with users.

- Agentforce for Customer Service and Data Cloud Integration
Learners will configure Agentforce for real-world service scenarios, synthesize insights from case studies, and integrate Salesforce Data Cloud for dynamic AI responses. They

	will create data-driven workflows for enhanced support delivery.
	• Autonomous Agents and AI Ethics Learners will design and deploy autonomous agents within Salesforce AI, evaluate privacy, trust, and fairness considerations, and apply ethical frameworks like the Einstein Trust Layer for responsible agent behavior.
	• Capstone Project: Building a Salesforce AI Agent Learners will synthesize knowledge from all modules to design, build, and deploy a comprehensive Salesforce AI service agent, demonstrating real-world problem-solving and evaluating system impact through feedback and refinement.

LEARNING OUTCOME:	• Navigate and analyze the Salesforce platform by configuring developer environments, comparing Lightning and Classic interfaces, and customizing the user experience through themes, branding, and navigation enhancements.
	• Design and create tailored Salesforce data models by configuring custom objects, fields, relationships, apps, and tabs to support business-specific solutions.
	• Apply and evaluate multi-level security models within Salesforce, implementing access controls using profiles, roles, permission sets, and validation rules to ensure robust data protection.
	• Create and optimize business process automations through Salesforce Flows, including screen, record-triggered, and scheduled/autolaunched flows, to improve operational efficiency.
	• Write, debug, and refactor Apex code utilizing SOQL, SOSL, and DML, while applying best practices for trigger design and Apex optimization to ensure scalable development.

	- Implement and analyze asynchronous processing techniques such as Future methods, Batch Apex, Scheduled Apex, and Queueable Apex to manage complex, large-scale operations effectively. - Develop comprehensive unit tests for Apex, evaluate test coverage scenarios (positive, negative, bulk, restricted), and apply test-driven development principles for maintainable code. - Design and integrate real-time communication between Salesforce and external systems using REST and SOAP APIs, and create custom web services within the platform. - Analyze foundational AI concepts—including neural networks, generative AI, LLMs, NLP, and data ethics—and evaluate their implications within the Salesforce ecosystem. - Create intelligent AI-driven agents using Salesforce Agentforce and Prompt Builder by applying prompt engineering strategies to enhance customer service workflows. - Integrate Data Cloud with Agentforce to generate AI-driven insights and deliver contextual responses through real-time data utilization in customer interactions. - Design and deploy secure autonomous AI agents by incorporating ethical considerations and leveraging the Einstein Trust Layer for responsible AI implementation. - Build, test, and deploy a fully functional AI service agent—from prompt engineering to launch—demonstrating end-to-end capabilities in a capstone hands-on project using Salesforce AI tools.

SL.NO	MODULE NAME	MODULE CONTENT	MODULE LEARNING OUTCOME	DURATION (HRS)
		TABLE 2: MODULE-WISE COURSE CONTENT AND OUTCOME		
1	Build a Data Model for a Travel Approval App	1. Process Improvement and Optimization 2. Configuration Management 3. System Design and Implementation 4. Data Science	By the end of this course, learners will be able to optimize business processes, manage configuration changes effectively, design and implement scalable systems, and apply data science techniques to analyze data and support informed decision-making.	1 hours 10 min
2	Customize a Salesforce Object	1. Work with Standard and Custom Fields 2. Create Picklists and Field Dependencies 3. Create Lookup Filters 4. Create Formula Fields 5. Create Record Types 6. Customize Record Pages 7. Enable Account Field History Tracking 8. Create Validation Rules	Learners will be able to work with standard and custom fields, create picklists and field dependencies, apply lookup filters, build formula fields, and configure record types. They will also be able to customize record pages, enable field history tracking, and implement validation rules to ensure data accuracy and control.	1 hours 45 Min
3	Data Modeling	1. Optimize Customer Data with Standard and Custom Objects 2. Create Object Relationships	Learners will be able to optimize customer data using standard and custom objects, create and manage object relationships, and effectively visualize and configure data	45 min

		3. Work with Schema Builder	models using the Schema Builder in Salesforce.	
4	Object Relationships Superbadge Unit	1. Data Model Optimization 2. Object Relationships 3. Schema Management 4. App Building	By the end of this module, learners will be able to optimize data models for efficiency and scalability, define and manage object relationships, perform schema management using tools like Schema Builder, and build custom applications tailored to business needs within the Salesforce platform.	1 hours
5	Formulas and Validations	1. Use Formula Fields 2. Implement Roll-Up Summary Fields 3. Create Validation Rules	By the end of this module, learners will be able to optimize data models for efficiency and scalability, define and manage object relationships, perform schema management using tools like Schema Builder, and build custom applications tailored to business needs within the Salesforce platform.	1 hour
6	Duplicate Management	1. Improve Data Quality in Salesforce 2. Resolve and Prevent Duplicate Data in Salesforce	By the end of this module, learners will be able to improve data quality in Salesforce by implementing best practices for data management and integrity. They will also be able to identify, resolve, and prevent duplicate records using built-in Salesforce tools and data validation strategies.	40 min

7	Data Validation Superbadge Unit	1. Configure a Validation Rule to Enforce a Specific Data Format 2. Build Validation Rules to Protect the Quality of Sales Data 3. Monitor, Identify, and Merge Duplicate Lead Records 4. Implement a Solution to Prevent Duplicate Contact Records		3 Hrs 30 minutes
8	Data Security	1. Overview of Data Security 2. Control Access to the Org 3. Control Access to Objects 4. Control Access to Fields 5. Control Access to Records 6. Create a Role Hierarchy 7. Define Sharing Rules	They will understand how to control user access at the organization, object, field, and record levels, create and manage role hierarchies, and define sharing rules to ensure proper data visibility and compliance with business requirements.	1 hour 45 Min
9	Data Management	1. Import Data 2. Export Data	learners will be able to implement robust data security measures in Salesforce. They will understand how to control user access at the organization, object, field, and record levels, create and manage role

			hierarchies, and define sharing rules to ensure proper data visibility and compliance with business requirements.	
10	Formulas Superbadge Unit	1. Build dynamic formula fields to meet business requirements. 2. Configure formulas for use within a report. 3. Describe formula best practices and troubleshooting techniques.	learners will be able to build dynamic formula fields tailored to specific business requirements, configure formulas for use within Salesforce reports, and apply best practices for writing, optimizing, and troubleshooting formulas to ensure accuracy and performance.	1 hour
11	Permission Set Groups	1. Get Started with Permission Set Groups 2. Create a Permission Set Group 3. Mute Permissions in Permission Set Groups	learners will understand how to streamline user access management in Salesforce using Permission Set Groups. They will be able to create, manage, and assign permission set groups to users, effectively bundling multiple permission sets to simplify role-based access. Learners will also understand how to use muting permission sets to remove specific permissions when needed and apply best practices for scalable and secure access control across the organization.	40 min

12	User Authentication	1. Secure Your Users' Identity 2. Customize Your Login Process with My Domain 3. Set Up Single Sign-On for Your Internal Users	By completing the User Authentication module on Salesforce Trailhead, learners will be able to enhance the security of their Salesforce orgs by implementing multi-factor authentication (MFA), customizing login processes using My Domain, and configuring single sign-on (SSO) for internal users. They will gain practical skills in identity and access management, ensuring secure and streamlined user authentication experiences within the Salesforce platform.	1 hour 50 min
13	User Authentication Troubleshooting Superbadge Unit	1. Identify and troubleshoot common user login issues in Salesforce. 2. Analyze login history data to investigate authentication failures. 3. Resolve Multi-Factor Authentication (MFA) and verification code challenges. 4. Diagnose and fix Single Sign-On (SSO) configuration errors.	By the end of the User Authentication Troubleshooting Superbadge Unit, learners will be able to identify and resolve common authentication issues in Salesforce, including login errors, multi-factor authentication (MFA) problems, and Single Sign-On (SSO) failures. They will develop the skills to analyze login history, configure My Domain settings, and manage user access effectively. Additionally, learners will demonstrate their ability to apply troubleshooting best practices to real-	1 hour

		5.	Configure and validate My Domain settings related to authentication.	world identity and access management scenarios, ensuring secure and seamless login experiences for users.	
		6.	Apply best practices to manage secure and efficient user access.		
		7.	Demonstrate real-world problem-solving skills in identity and access management scenarios.		
14	User Authenticati on Settings Superbadge Unit	1. 2. 3. 4.	Set Appropriate Password Policies Configure Login Requirements and Limits Control API Access for Connected Apps Set Trusted IP Addresses for Users	By the end of this module, learners will be able to set and manage secure password policies, configure login requirements and session limits, control API access for connected apps, and define trusted IP address ranges to enhance user authentication and protect organizational data in Salesforce.	1 hours
15	Access Governance Superbadge Unit	1. 2.	Audit Privileged Users and Adjust Permissions Appropriately Monitor Changes to Key Data and Mitigate Exposure of	By the end of this module, learners will be able to audit privileged user activity and adjust permissions to align with least privilege principles. They will be equipped to monitor changes to critical data, mitigate risks related to	1 hour

		3.	Sensitive Data Describe Best Practices in Monitoring Connected App Access	sensitive data exposure, and apply best practices for monitoring access and usage of connected apps to ensure compliance and data security in Salesforce.	
16	User Access Troubleshooting Superbadge Unit	1. 2. 3. 4.	Adjust Access Levels with Profiles and Permission Sets Identify and Fix Unintended Sharing Configure Visibility Updates Based on Requirements Adhere to Company Standards and Policies	learners will enhance their skills in managing user access and permissions within Salesforce, ensuring secure and appropriate data access across the organization.	1 hour
17	Multi-Factor Authentication and Single Sign-On Settings Superbadge Unit	1. 2. 3. 4.	Configure Single Sign-On Settings Set Up Multi-Factor Authentication Enable Lightning Login Test Configurations with the Salesforce Authenticator App	Learners will strengthen their understanding of implementing and managing secure authentication mechanisms in Salesforce, including Multi-Factor Authentication (MFA) and Single Sign-On (SSO), to enhance user security and streamline login experiences across the organization.	1 hour
18	Protect Your Data in Salesforce	1. 2.	Restrict Login Hours and IP Ranges Create New Users and	Learners will gain practical knowledge on how to safeguard sensitive information within Salesforce by configuring data	1 hour 5 mins

			access controls, applying security settings, and ensuring compliance with data protection best practices, helping maintain the integrity and confidentiality of organizational data.	
		3. Set Organization-Wide Defaults and Create a Role Hierarchy 4. Create Sharing Rules 5. Set Up Account Teams		
19	Extended User Access and Restriction Superbadge Unit	1. Adjust Organization-Wide Sharing Settings 2. Create Roles and Sharing Using Hierarchies 3. Build Owner and Criteria-Based Sharing Rules 4. Use Restriction Rules to Filter Record Access	Learners will develop the ability to configure advanced access settings in Salesforce, including permission sets, delegated administration, and login IP ranges, to ensure users have appropriate access while maintaining robust security across the platform.	1 hour
20	Approval Process Management Superbadge Unit	1. Create an Approval Process with Specific Criteria, Outcomes, and Approvers 2. Modify an Approval Process to Reflect New Criteria	Learners will build expertise in designing and automating approval workflows in Salesforce, enabling efficient business process management by ensuring the right stakeholders review and approve records in a structured and secure manner.	1 hour
21	Approval Process Troubleshooti	1. Troubleshoot an Approval Process	Learners will enhance their problem-solving	2 hour

	ng Superbadge Unit	2.	Modify an Approval Process to Reflect New Criteria	skills by diagnosing and resolving common issues in Salesforce approval processes, ensuring smooth workflow execution and maintaining business process integrity.	
22	Autolaunched and Scheduled Flows	1. Get Started with Autolaunched Flows 2. Build an Autolaunched Flow 3. Run an Autolaunched Flow from a Custom Button 4. Schedule a Flow		Learners will acquire the skills to create and manage autolaunched and scheduled flows in Salesforce, enabling the automation of background processes without user interaction and ensuring timely execution of routine tasks to improve operational efficiency.	1 hour 30 mins
23	Flow Fundamentals Superbadge Unit	1. Adjust Existing Automations for Enhanced Performance and Functionality 2. Solve for Requirements Allowing Users Appropriate Access and Notifications 3. Working with Different Versions of Flows 4. Flow Trigger Explorer 5. Process Automation		Learners will strengthen their administrative capabilities by mastering how to monitor, manage, and troubleshoot flows in Salesforce, ensuring optimized performance, error handling, and compliance with best practices in automation governance.	1 hour

			Settings		
24	Flow Fundamentals Superbadge Unit	1. 2. 3. 4. 5.	Configuring Action and Create Record elements Using Resources and Flow Actions to save a record to a record variable Using Get, Update, Decision, Assignment, and Loop elements in a flow Creating a formula in a flow Differentiating between benefits and limitations of different types of flows	Learners will gain a solid foundation in Salesforce Flow by understanding its core components, building basic flows, and applying best practices to automate simple business processes with confidence and clarity.	1 hour
25	Flow Optimization Superbadge Unit	1. 2. 3.	Optimize existing flows Enhance existing flows to automate manual processes Adjust a flow so that it only runs on bulk record import	Learners will advance their automation skills by optimizing flow performance, improving scalability, and applying efficient design patterns, ensuring robust and maintainable business process automation in Salesforce.	1 hour
26	Screen Flow Fundamentals Superbadge	1.	Configure a screen flow to collect	Learners will develop the ability to design and configure user-	1 hour

	Unit		information from users	friendly screen flows in Salesforce, enabling interactive data collection, guided user experiences, and effective automation of front-end business processes.	
		2.	Use Flow elements and actions to create detailed records		
		3.	Use Get Records elements to find and update matching records		
27	Screen Flow Distribution Superbadge Unit	1.	Distribute established flows across user interfaces	Learners will master the methods for deploying and distributing screen flows across various Salesforce experiences, ensuring seamless access for users through record pages, utility bars, quick actions, and other channels.	1 hour
		2.	Enhance existing flows to improve the user experience		
28	Apex Specialist Superbadge	1.	Automate Record Creation Using Apex Triggers	Learners will demonstrate advanced proficiency in Apex by applying object-oriented programming principles, writing scalable and reusable code, implementing business logic through triggers and classes, and performing effective testing using test classes and assertions. This Superbadge validates their ability to build robust and	12 hours
		2.	Synchronize Salesforce Data with an External System Using Asynchronous REST Callouts		
		3.	Schedule Synchronizatio n Using Apex Code		
		4.	Test Automation		

		Logic to Confirm Apex Trigger Side Effects 5. Test Integration Logic Using Callout Mocks 6. Test Scheduling Logic to Confirm Action Gets Queued	efficient solutions on the Salesforce platform using Apex.	
29	Become an Agentblazer Champion	1. Get Started with Artificial Intelligence Basics 2. Explore Salesforce AI 3. Meet Agentforce 4. Get Hands on with Agentforce	Learners will gain a strong understanding of how to deliver exceptional customer service using Salesforce Service Cloud. They will explore key features like case management, knowledge base, and AI-powered tools, empowering them to champion agent productivity and customer satisfaction.	6 hour 43 mins

TABLE 3: OVERALL COURSE LEARNING OUTCOME ASSESSMENT CRITERIA AND USECASES		
LEARNING OUTCOME	ASSESSMENT CRITERIA	Lab practices
Build a data model for a travel approval app in Salesforce	Create and configure custom objects and relationships aligned with travel approval	Use Object Manager and Schema Builder to build and visualize the data model.

	processes.	
Customize Salesforce objects to match business requirements.	Create fields, record types, page layouts, and validation rules as per given specs.	Apply customizations in a developer org and test their behavior with sample data.
Design efficient and scalable data models using standard and custom objects.	Establish object relationships and apply best practices for schema management.	Work with Schema Builder to visualize and optimize data models.
Build advanced object relationships and apps within Salesforce.	Apply relationship types, schema best practices, and app-building strategies.	Create custom apps and manage metadata using advanced relationship techniques.
Implement formulas and validation rules to control and automate business logic.	Create roll-up summaries and conditional logic validations accurately.	Build formula fields and test validation rules in a sandbox environment.
Maintain high data quality and prevent duplicates in Salesforce.	Use duplicate rules and matching rules to identify and block duplicate records.	Configure duplicate management tools and test using sample data sets.

TABLE 4: LIST OF FINAL PROJECTS (PROJECTS THAT COMPREHENSIVELY COVER ALL THE LEARNING OUTCOME)	
SL.NO	FINAL PROJECT
1	Student Enrolment & Course Management System
2	Travel Request & Approval Workflow App
3	Real Estate Listing & Client Interaction Tracker
4	Employee Leave & Performance Management Tool
5	Event Registration & Feedback Collection System
6	Inventory & Vendor Management Dashboard
7	Lead Capture & Duplicate Detection System
8	Sales Order & Incentive Calculation Application
9	Hospital Patient & Appointment Management System
10	Nonprofit Donor & Campaign Tracking App

TABLE 5: COURSE ASSESSMENT RUBRICS (TOTAL MARKS: 75)				
ASSESSMENT CRITERIA	DESCRIBE THE CRITERIA OF THE BELOW CATEGORY PERFORMANCE			TOTAL MARKS
	FAIR	GOOD	EXCELLENT	
Problem Definition & Design Thinking	3	5	8	10
Innovation & Problem Solving	1	2	4	5
Implementation of Project	6	12	18	20
Performance of the Project	1	2	4	5
Project Demonstration & Documentation	3	5	8	10
MCQ-based assessment 25 Questions				25

Category	Assessment Criteria	Performance Levels	Weightage (Marks)
Practical Skills Proficiency	Demonstrates ability to perform job-specific tasks effectively, using relevant tools, techniques, or methodologies (e.g., Tally for accounting, consignment tracking).	Fair, Good, Excellent	20
Technical Knowledge Application	Applies theoretical concepts to practical scenarios with accuracy and relevance (e.g., compliance with GST laws, financial planning, or logistics protocols).	Fair, Good, Excellent	15
Project Execution	Completes assigned projects or use cases demonstrating innovation, thoroughness, and skill application relevant to industry standards.	Fair, Good, Excellent	30
Communication and Reporting	Clearly presents findings, solutions, or project outcomes using professional communication and documentation standards (e.g., reports, presentations).	Fair, Good, Excellent	10