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Updated on 11/24/2025

Register

# Salesforce Certified Platform Administrator Training

ALL-IN-ONE: EXAM INCLUDED IN THE PRICE

5 days (35 hours)

## Overview

Our Salesforce Certified Platform Administrator training course will help you accelerate sales, service, and marketing. Using real-world examples, learn how to transform business needs into reliable, secure, and measurable configurations.

The training aims to set up a ready-to-use org: objects, fields, security, automations, and reporting. You will learn best practices in governance, data quality, and daily maintenance.

The approach is decidedly practical: guided demos, step-by-step workshops, and sandbox/playground exercises. Deliverables: configured org, report templates, reusable flows, security checklist, and operating guide.

## Objectives

- Gather and formalize requirements.
- Model objects, fields, and relationships.
- Secure via profiles and sharing.
- Automate with Flow Builder.
- Build reports and dashboards.

## Target audience

- Beginner Salesforce administrators.
- Sales/Service/Marketing managers.
- Project managers or IT PMOs.

- Junior CRM consultants.

## Prerequisites

- Basic knowledge of CRM and processes.
- Relational databases.
- Proficiency with Excel/CSV.
- Ability to read technical English.
- Operational experience desirable.

## Technical requirements

- Laptop with 8 GB RAM.
- Windows, macOS, or Linux.
- Chrome, Edge, or Firefox browser.
- Stable internet access.
- Access to a Salesforce Playground.

## Salesforce Administrator training program

### [Day 1 - Morning]

### Introduction to Salesforce and org configuration

- Understanding editions, licenses, and org structure
- Configure the company: language, time zones, taxation, currencies
- Organizing applications, tabs, and Lightning navigation
- Create users, set passwords and policies
- Configure global settings (hours, holidays, email)
- Hands-on workshop: Initialize an org and create 3 users with appropriate settings.

### [Day 1 - Afternoon]

### Model the Salesforce data model

- Distinguish between standard and custom objects and naming conventions
- Create fields (types, help, dependencies) and manage the FLS
- Set up lookup relationships, master-detail relationships, and junction objects
- Use roll-up summaries, formulas, and deletion rules
- View the schema with Schema Builder and impacts
- Hands-on workshop: Build the "Sales" model (objects, relationships, margin formulas).

### [Day 2 - Morning]

## Security and access control

- Configure profiles, permission sets, and permission set groups
- Define the sharing model (OWD) and role hierarchy
- Implement sharing rules, manual sharing, and criteria-based sharing
- Structure account/opportunity teams, queues, and territories
- Apply best practices for least privilege and auditing
- Hands-on workshop: Secure access between Sales and Support teams with OWD and sharing.

## [Day 2 - Afternoon]

## Customizing the Lightning interface

- Designing Page Layouts, Compact Layouts, and Record Types
- Assemble Lightning Record Pages with App Builder
- Configuring conditional visibility of components and actions
- Optimizing navigation (apps, tabs, favorites, utilities)
- Preparing the mobile experience (quick actions, forms)
- Hands-on workshop: Create a sales-oriented Opportunity page with dynamic components.

## [Day 3 - Morning]

## Automate with Flow Builder

- Choose the right type of Flow (record-triggered, scheduled, screen)
- Model variables, collections, sub-flows, and reusable patterns
- Manage exceptions, errors, and transactions; debug and test
- Limit DML/SOQL, governance, and flow performance
- Migrate from Workflow/Process Builder (Migrate to Flow)
- Hands-on workshop: Create a flow for auto-enriching Opportunities.

## [Day 3 - Afternoon]

## Routing and Sales/Service processes

- Set up Lead and Case assignment rules
- Configure automatic responses and escalation rules
- Manage queues, teams, and presence
- Design multi-level approval processes
- Standardize communications with email templates
- Hands-on workshop: Implement Lead-to-Opportunity with assignment and discount approval.

[Day 4 - Morning]

## Data import, cleaning, and governance

- Choose between Data Import Wizard and Data Loader depending on the situation
- Prepare files, mapping, upsert, and ID management
- Ensure quality with validation rules and picklists
- Combat duplicates (Matching Rules, Duplicate Rules)
- Plan export/backup and restore strategies
- Hands-on workshop: Importing leads, deduplicating, and correcting validation errors.

[Day 4 - Afternoon] Reports

## and dashboards

- Mastering report types: tabular, summary, matrix, joint
- Using cross filters, buckets, row formulas
- Build relevant groupings, summaries, and graphs
- Create dynamic dashboards, subscriptions, and schedules
- Ensuring data security in reports
- Hands-on workshop: Design a sales dashboard to manage pipeline and forecasts.

[Day 5 - Morning]

## Environments, testing, and deployments

- Using Sandboxes (Developer, Partial, Full) and refreshes
- Preparing test data sets and anonymization
- Compare Change Sets and DevOps Center (pipelines, validations)
- Manage metadata, packages, and dependencies
- Plan releases and manage Salesforce release notes
- Hands-on workshop: Deploy a Flow and layouts from the sandbox to production.

[Day 5 - Afternoon]

## Day-to-day administration and adoption

- Evaluate and install AppExchange apps securely
- Monitoring with Login History, Setup Audit Trail, and notifications
- Strengthen security posture (Health Check, session/password policies)
- Support adoption: In-App Guidance, checklists, feedback
- Organize maintenance, documentation, and operations dashboard

- Hands-on workshop: Implement a quarterly operations and adoption plan.

## Target companies

This training is intended for both individuals and companies, large or small, wishing to train their teams in new advanced IT technology or to acquire specific business knowledge or modern methods.

## Positioning at the start of training

The positioning at the start of the training course complies with Qualiopi quality criteria. Once they have finalized their registration, learners receive a self-assessment questionnaire that allows us to assess their estimated level of proficiency in different types of technologies, as well as their expectations and personal objectives for the upcoming training course, within the limits imposed by the selected format. This questionnaire also allows us to anticipate certain connection or internal security issues within the company (intra-company or virtual classroom) that could be problematic for the monitoring and smooth running of the training session.

## Teaching methods

Practical training: 60% practical, 40% theory. Training materials distributed in digital format to all participants.

## Organization

The course alternates between theoretical input from the trainer, supported by examples and reflection sessions, and group work.

## Assessment

At the end of the session, a multiple-choice questionnaire is used to verify that the skills have been correctly acquired.

## Certification

A certificate will be issued to each trainee who has completed the entire training course.