



Salesforce Sales Cloud (Users)

STR101: What's Possible – Salesforce Fundamentals

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- 3 Days

Upcoming Dates

Course Description

Are you a business analyst or project manager who is looking to learn more about how Salesforce can solve specific business issues? What's Possible: Salesforce Fundamentals provides the information to enable you to effectively engage with your business stakeholders. The course walks through a series of typical business challenges to provide you with the background to solve your specific business needs.

Course Outline

Welcome

- Overview of Salesforce architecture, objects, and navigation
- Tour of the application
- Identify key roles within your company

Data Access and Security

- Control who can view and modify information
- Decide who can view and change individual records
- Dealing with record access exceptions
- Support team selling with territory management

Customization

- Capture specific information by adding custom fields
- Control how data is captured using pick lists
- Streamline data entry with page layouts
- Meet different business scenarios using record types
- Secure information at the field level

Automation

- Ensure data integrity using validation rules
- Route requests to the right person using assignment rules
- Improve customer satisfaction with escalation rules
- Automate lead capture using web-to-lead

- Increase quality and efficiency with work flow rules
- Reduce delays and bottlenecks with approval processes
- Enforce business processes with visual work flow

Reports and Dashboards

- Find and run the right report
- Gain insight into wins and losses with custom reports
- Analyze data with matrix reports
- Use dashboards to share key metrics with teams

Collaboration

- Collaborate using Chatter
- Collaborate with internal and external groups
- Create environments for customer and partner engagement using Communities
- Salesforce tools expand the reach of your Communities

Data Migration and Integration

- Migrate data to collect and synchronize information
- Improve data quality and quantity with Data.com
- Integrate systems to automate and streamline your business

Extending Salesforce

- Capture additional data using custom objects and tabs
- Create a unique and specific workspace with a custom application
- Make use of existing AppExchange resources
- Build outside the box with programmatic tools: Visualforce and Apex

Additional Resources

- Share with key roles within your company
- Engage in community resources and help sites
- Explore your training options

Audience

What's Possible: Salesforce Fundamentals is designed for individuals who need an understanding of the capabilities of Salesforce to determine how to best solve their business challenges using Salesforce. The course is targeted at individuals in the following roles:

- Business Analysts
- Consultants
- Project and Process Managers

Prerequisites

No prior knowledge or experience with Salesforce is required.

What You Will Learn

When you complete this course, you will be able to:

- Describe Salesforce products and solutions.
- Ask discovery questions to identify specific business needs within your company
- Make informed decisions about which Salesforce solutions meet your business needs
- Help your business understand Salesforce design decisions, implications, and best practices
- Identify and leverage sources of additional information and support