



Salesforce Sales Cloud (Users)

BSX101: Discover Salesforce Fundamentals to Support Your Business

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- 3 Days

Upcoming Dates

Course Description

Explore what's possible with Salesforce. In this 3-day class, our Salesforce experts will walk you through the Salesforce Platform, its specific applications, and their business values and benefits. Familiarize yourself with Salesforce Cloud and learn about platform features and processes to more effectively support day-to-day Salesforce operations within your organization. Through interactive lectures, discussions, and hands-on exercises, you'll recognize the core elements of the implementation lifecycle, the key considerations to drive user adoption, and the important components of ongoing management of your Salesforce environment.

Course Outline

Introduction

- Understand How Salesforce Works
- Explore Salesforce Applications
- Review Salesforce Organization

Data Access and Security

- Control Org Access
- Manage Who Views and Modifies Objects
- Unlock Access to Records
- Share Access to Records
- Lock Down Individual Fields

User Management and Troubleshooting

- Create New Users
- Troubleshoot Login, Record Access, and Field Visibility Issues

Salesforce Customizations

- Think About Your Implementation
- Explore Custom Fields, Picklists, Page Layouts, and Record Types
- Create Email Templates

Business Processes Automation

- Review Validation Rules
- Review Assignment and Escalation Rules
- Review Web-to-Lead and Entitlements
- Review Lightning Process Builder and Workflow
- Review Approval Processes and Visual Workflow

Reports

- Explore the Reports Tab, Folders, and Formats
- Explore the Report Builder
- Summarize Your Data

Dashboards and Data Insights

- Get More Insight from Your Data
- Visualize Your Data with Dashboards
- Create Your Analytics Strategy

Everyday Salesforce

- Collaborate with Chatter, Groups, and Communities
- Share Feedback with Chatter Answers and Ideas
- Go Mobile with Salesforce1
- Make Salesforce Part of Your Day

Data Management

- Create a Data Migration Strategy
- Ensure Data Quality

Extending Salesforce

- Drive a Salesforce Implementation
- Customize Salesforce Using Custom Objects, Apps, and the Salesforce AppExchange
- Build It Yourself

Wrap-up and Certification

- Review the Certification Process and Resources

Audience

This class is ideal for business users — the people who need to learn what's possible with Salesforce functionality across the suite of products but aren't necessarily responsible for managing the application. If you're a customer service manager, business executive, business operations manager, sales operations manager, or any other operations, management, or process analysis "super user," this

class is just what you need to better understand the business value of the Salesforce Platform.

Prerequisites

What You Will Learn

- Describe the primary business value of each major Salesforce Cloud.
- Manage users and data.
- Manage basic org configuration.
- Create email templates.
- Create reports and dashboards.
- Apply and champion Chatter.
- Understand the Salesforce implementation and maintenance lifecycle.
- Extend Salesforce functionality beyond basic configuration.