

Sales Force Management Course Content (150 hrs)

Module	Topics	Mode	Hours
Cloud Concepts	Cloud Computing definition, Cloud Service models, Cloud Deployment	Theory	1
Trailhead Basics	Get Started with Trailhead Find Your Way Around Trailhead Troubleshoot and Find Answers to Common Questions	Theory+Demo	2
Impacts of the Fourth Industrial Revolution	Understand the Impact of the Fourth Industrial Revolution on Business Understand the Impact of the Fourth Industrial Revolution on Society and Individuals	Theory+Demo	2
Trailhead Playground Management	1. Create a Trailhead Playground 2. Get Your Trailhead Playground Username and Password 3. Install Apps and Packages in Your Trailhead Playground	Theory+Demo	3
Salesforce Platform Basics	1. Get Started with the Salesforce Platform 2. Discover Use Cases for the Platform 3. Understand the Salesforce Architecture 4. Navigate Setup 5. Power Up with AppExchange	Theory+Demo	4
Salesforce User Basics	1. Welcome to Salesforce 2. Get Started with Salesforce 3. Work with Your Salesforce Admin	Theory+Demo	4
Lightning Experience Basics	1. Get to Know Lightning Experience 2. Start Your Lightning Experience Rollout 3. Go Live with Lightning Experience	Theory+Demo	4
Data Modeling	1. Understand Custom & Standard Objects 2. Create Object Relationships 3. Work with Schema Builder	Theory+Demo	5
Formulas and Validations	1. Use Formula Fields 2. Implement Roll-Up Summary Fields 3. Create Validation Rules	Theory+Demo	5

Picklist Administration	<ol style="list-style-type: none"> 1. Get Started with Picklists 2. Manage Your Picklist Values 3. Share Values with Global Value Sets 	Theory+Demo	4
AppExchange Basics	<ol style="list-style-type: none"> 1. Get Started with AppExchange 2. Navigate AppExchange Like a Superhero 3. Install AppExchange Packages (Also Like a Superhero) 	Theory+Demo	4
Data Management	<ol style="list-style-type: none"> 1. Import Data 2. Export Data 	Theory+Demo	4
Lightning Experience Customization	<ol style="list-style-type: none"> 1. Set Up Your Org 2. Create and Customize Lightning Apps 3. Create and Customize List Views 4. Customize Record Highlights with Compact Layouts 5. Customize Record Details with Page Layouts 6. Create Custom Buttons and Links 7. Empower Your Users with Quick Actions 	Theory+Demo	6
Salesforce Mobile App Basics	<ol style="list-style-type: none"> 1. Get Started with the Salesforce Mobile App 2. Find your data 	Theory+Demo	4
User Management	<ol style="list-style-type: none"> 1. Add New Users 2. Control What Your Users Can Access 	Theory+Demo	4
Data Security	<ol style="list-style-type: none"> 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 	Theory+Demo	7

Salesforce Mobile App Customization	<ol style="list-style-type: none"> 1.Get Started with the Salesforce Mobile App 2.Customize Navigation 3.Create Global Quick Actions 4.Create Object-Specific Quick Actions 5.Customize Compact Layouts 	Theory+Demo	5
Security Specialist	<ol style="list-style-type: none"> 1.Data Security 2.Identity Basics 3.User Authentication 	Theory+Demo	12
Accounts & Contacts for Lightning Experience	<ol style="list-style-type: none"> 1.Get Started with Accounts and Contacts 2.Understand Account and Contact Relationships 	Theory+Demo	4
Leads & Opportunities for Lightning Experience	<ol style="list-style-type: none"> 1.Create and Convert Leads 2.Work Your Opportunities 3.Sell as a Team and Split the Credit 4.Visualize Success with Path and Kanban 	Theory+Demo	4
Service Cloud for Lightning Experience	<ol style="list-style-type: none"> 1.Begin Your Service Journey 2.Administer Service Cloud 3.Automate Case Management 4.Create Digital Engagement on Multiple Channels 	Theory+Demo	4
Entitlement Management	<ol style="list-style-type: none"> 1. Get Started with Entitlements 2.Set Up Required Support Steps 3.Use Entitlements in Customer Cases 	Theory+Demo	4
Set Up Case Escalation and Entitlements	<ol style="list-style-type: none"> 1.Create Support Processes 2.Create Case Queues and an Assignment Rule 3.Create a Case Escalation Rule 4.Create a Flow with Process Builder 5.Enable Entitlements and Set Up Service Contracts 6.Create an Entitlement Process 7.Create Service Contracts with Entitlements 	Theory+Demo	4

Reports & Dashboards for Lightning Experience	<ol style="list-style-type: none"> 1.Introduction to Reports and Dashboards in Lightning Experience 2. Create Reports with the Report Builder 3.Format Reports 4.Visualize Your Data with the Lightning Dashboard Builder 5.Extend Your Reporting Strategy with AppExchange 	Theory+Demo	4
Quick Start: Reports & Dashboards	<ol style="list-style-type: none"> 1.Create an Opportunities Report 2.Configure the Report 3.Create a Dashboard 	Theory+Demo	4
Create Reports and Dashboards for Sales and Marketing Managers	<ol style="list-style-type: none"> 1.Create Report and Dashboard Folders 2.Create a Simple Custom Report 3.Filter Your Reports 4.Group and Categorize Your Data 5.Use Summary Formulas in Your Reports 6.Manage Reported Data 7.Visualize Your Data 	Theory+Demo	4
Customize an Org to Support a New Business Unit	<ol style="list-style-type: none"> 1.Manage User Access 2.Manage Chatter 3.Modify Your Data Model 4.Configure an Email Letterhead and Template 5.Automate Your Business Process 	Theory+Demo	4
Data Quality	<ol style="list-style-type: none"> 1.Get Started with Data Quality 2.Assess the Quality of Data 3.Improve Data Quality 	Theory+Demo	4
Lightning Experience Reports & Dashboards Specialist	<ol style="list-style-type: none"> 1.Reports and Dashboard for Lightning experience 2. Create reports and dashboards for Sales and Marketing Managers 3.Quick Start: Lightning App Builder 	Theory+Demo	4
Chatter for Lightning Experience	<ol style="list-style-type: none"> 1.Get Started with Chatter 2.Create Posts, Polls, and Questions 3.Customize Your Chatter Experience 4.Become a Chatter Expert 	Theory+Demo	4

Community Cloud Basics	<ol style="list-style-type: none"> 1. Get Started with Community Cloud 2. Engage with Your Customers 3. Engage with Your Partners 	Theory+Demo	5
Marketing Cloud Basics	<ol style="list-style-type: none"> 1. Get Started with Marketing Cloud 2. Learn About Marketing Cloud and the Customer Success Platform 3. Get the Most Out of Marketing Cloud 	Theory+Demo	5
Business Administration Specialist	<ol style="list-style-type: none"> 1. Reports and Dashboard for Lightning experience 2. Create reports and dashboards for Sales and Marketing Managers 3. Data Security 4. Customize and Org to support new Business Unit 	Theory+Demo	12