Module Title : SLX101 - Sales Cloud Training for Sales Reps Using Lightning
Duration : 1 day

OVERVIEW

Sales Cloud Training for Sales Reps is essential for Sales Representatives who are new to Salesforce Sales Cloud (and the new Lightning Experience) and need to quickly get up to speed on its productivity tools. Sales Reps will learn how to use the Sales Cloud to track prospective clients, manage accounts and opportunities, manage their workflow, communicate with clients, and run reports using the new Lightning Experience. This course is structured in a modular format and totals one full day of content.

WHO SHOULD TAKE THIS COURSE?

Sales Cloud Training for Sales Reps is designed for:

- Sales Representatives who are new to using Salesforce Sales Cloud and are using the Lightning Experience.

WHEN YOU COMPLETE THE COURSE, YOU WILL BE ABLE TO:

- Navigate Salesforce using the Lightning Experience.
- Find and add information related to accounts, contacts, leads, opportunities, and activities.
- Use Salesforce to create and track sales activities.
- Enter information into Salesforce so managers can accurately analyze sales.
- Customize Salesforce reports and charts to manage and analyze contact and account information.
- Use Salesforce1 on a mobile device.

MODULES & TOPICS

Introduction to Salesforce: Managing Your Accounts and Contacts

- Get Started in Salesforce
- Use Reports to Analyze Your Accounts
- Research What's Happening with Your Accounts
- Use Chatter to Get More Information
- View Current News About Your Accounts in Salesforce1
- Create New Accounts and Contacts
- Add Charts to List Views
- Use Reports to Track At-Risk Accounts

Effective Prospecting: Managing Leads and Opportunities

- Locate and Enter Leads in Salesforce
- Use List Views to Organize and Prioritize Leads
- Update Lead Status to Track Your Progress
- Convert Qualified Leads to Accounts, Contacts, and Opportunities
- Track Opportunities Through the Sales Process
- Add Products to Opportunities
- Find Information in Salesforce to Close Deals
- Report on Leads and Opportunities

Sales Productivity: Streamlining Your Day

- Use Tasks to Track Calls, Emails, and To-Dos in Salesforce
- Locate, Add, and Complete Activities in Salesforce1
- Tour the Today App in Salesforce1
- Send Email Directly from Salesforce
- Save Time with Standard and Custom Email Templates
- Analyze your Sales Activities with Reports

Reporting: Track Your Deals

- Work with Standard Reports
- Customize Reports
- Modify Report Options
- Use the Report Builder for Deeper Customizations
- Apply Report Filters and Filter Logic
- Summarize Your Data in Reports
- Add Charts to Reports
- Use Dashboards to Visualize Data