

**Salesforce Certified Sales Cloud Consultant**

**Course Number:** SF-116
**Duration:** 5 days

**Overview**

This Salesforce® Certified Sales Cloud Consultant training course teaches attendees the key sales automation concepts within Salesforce and helps them prepare for the [Salesforce Certified Sales Consultant exam](https://trailhead.salesforce.com/credentials/salescloudconsultant)

**Prerequisites**

All students must have:

* Taken [Salesforce Administration in Lightning Experience](file:////training/salesforce-administration) or have equivalent experience
* Completed the [Salesforce.com Certified Administrator exam](https://trailhead.salesforce.com/credentials/administrator)

**Materials**

All Salesforce training students will receive comprehensive courseware.

**Software Needed on Each Student PC**

Salesforce is web-based and attendees only need an Internet connection and modern web browser for training. Salesforce recommends Chrome.

**Objectives**

* Understand software development lifecycles and project management strategies
* Work with the Salesforce Platform architecture, the model, view, controller design pattern, and typical Salesforce automation goals
* Learn about system security, including users, licenses, profiles, field level security, permission sets
* Use delegated administration including record security, organization-wide defaults, role hierarchy, and sharing rules
* Work with account teams, sales teams, territory management, and queues
* Understand the object model related to Salesforce automation
* Work with contacts and person accounts, opportunities, products & price books, quotes, forecasting, assets, contracts, leads, and campaigns
* Incorporate integration, success metrics, analytics, and best practices

**Outline**

* Introduction
	+ Course Overview
	+ Exam Overview
* Sales Cloud Implementation Project Management
	+ Project Methodology
	+ Keys To Success
	+ Success Metrics
	+ Best Practices
* Salesforce Infrastructure
	+ Multitenancy
	+ Salesforce Ecosystem
	+ Declarative vs Programmatic Development
	+ Model View Controller
* Deployment and Change Management
	+ Metadata API
	+ Packages
	+ Change Sets
	+ Scratch Orgs
* Sales Cloud Overview
	+ Key Objects
	+ Typical Sales Environments
	+ Typical Goals and Challenges
	+ A Day In The Life of a Sales Organization
* Platform Configuration
	+ User Interface
	+ Multicurrency
	+ Language
* salesforce Licensing and User Management
	+ Users
	+ Licenses
* Profiles
	+ Profiles
	+ Field Level Security
	+ Permission Sets
	+ Delegated Administration
* Record Access and Security
	+ Record Ownership / Full Access
	+ Organization Wide Defaults
	+ Role Hierarchy & Roles
	+ Sharing Rules
	+ Manual Sharing
	+ Record Assignment and Collaboration
	+ Account Teams
	+ Opportunity Teams
	+ Enterprise Territory Management
	+ Queues
* Salesforce Automation
	+ Declarative
		- Formula Fields
		- Roll Up Summary Fields
		- Validation Rules
		- Workflow, Process Builder and Flow
	+ Programmatic
		- Apex
		- Visualforce
		- Lightning Components
* Sales Process Configuration
	+ Accounts
		- Record Types
		- Account Hierarchy
	+ Contacts & Person Accounts
	+ Opportunities
		- Record Types and Sales Processes
	+ Products & Price Books
	+ Quotes and Orders
	+ Assets & Contracts
* Data Management
	+ Data Quality
	+ Data Enrichment
	+ Integrations
	+ Salesforce to Salesforce
	+ External Objects
	+ API Integrations
* Analytics
	+ Reporting
	+ Dashboards
	+ Analytic Snapshots
	+ Sales Cloud Einstein
* Productivity Tools
	+ Sales Productivity Tools
	+ Outlook Integrations
	+ Mobile
	+ Chatter
	+ Content
* Marketing
	+ Marketing Integrations
	+ Leads
	+ Lead Scoring
	+ Lead Conversion
	+ Campaign Management
	+ Communities – 30 MINS
	+ Partner Communities
	+ Customer Communities
	+ Employee Communities
* Practice Exam and Question Review
* Conclusion and Next Steps