

**Salesforce Experience Cloud Consultant**

**Course Number:** SF-124  
**Duration:** 5 days

**Overview**

This Salesforce® Experience Cloud Consultant training course teaches students how to create communities in their organization, build communities for partners and customers, and track activity and engagement. This training is an alternative to Salesforce's Get Started with Communities in Lightning Experience (ADX271).

This course is appropriate preparation for the [Salesforce Community Cloud Consultant Certification exam](https://trailhead.salesforce.com/credentials/experiencecloudconsultant).

**Prerequisites**

Students should have completed Accelebrate's [Salesforce Administration & Configuration in Lightning Experience](file:////training/salesforce-administration-and-configuration) course or have the equivalent experience.

**Materials**

All Salesforce Experience Cloud Consultant training students receive comprehensive courseware.

**Software Needed on Each Student PC**

Each student will be given a practice learning environment to use during hands-on exercises during the class. The student will be able to use this learning environment indefinitely after the class without any additional fee.

**Objectives**

* Enable experiences in your organization
* Learn how experiences work and their capabilities.
* Create an experience for Partner Relationship Management.
* Create an experience to provide self-service support for customers.
* Understand the different steps to a successful implementation.
* Learn best practices to maintain engagement on an ongoing basis.

**Outline**

* Introduction
  + Course Aims and Overview
  + Scenario Introduction: GenWatt
  + Setting Up Practice Environment
* Certification and Exam Review
  + Readiness Assessment tool
* Use Cases for Communities
  + Customer Communities
  + Partner Communities
  + Employee Communities
* Experience Cloud Infrastructure
  + Experiences Architecture
  + How Experiences works in conjunction within the context of Salesforce
    - Profiles / Permission Sets
    - Data Access
    - Automation
  + Custom Domain
    - Setting up a custom domain
    - Use of sub-domains and redirects
* Experiences Licensing
  + License Types
    - Salesforce/Platform Licenses
    - Customer Community / Customer Community Plus Licenses
    - Partner Community
  + Licensing Options
    - Unauthenticated Access
    - Named Member
* Implementing Experience Cloud
  + Experience cloud project milestones
    - Establish
    - Manage
    - Engage
    - Measure
  + Creating a login for a new team member
* Experience Cloud Environment Settings
  + Experience Settings
  + Creating a new experience from a template
* Experience Cloud Development Environment
  + Tour of Experiences Workspace
  + Tour of Experiences Builder
* Managing the Development Team
  + Applicable System Permissions
  + Membership
  + Contributor Roles
  + Setting up an additional development team member
* User Provisioning for Experience Cloud
  + Manual Methods of User Provisioning
    - Via the user record
    - Via the contact record
    - Creating new users with access to experiences
  + Automated Methods of User Provisioning
    - Via the API
    - Via single sign-on
    - Via self registration
    - Setup self-registration for a customer community
* Branding
  + Working with themes
    - How themes work within an experience
    - Theme Settings
    - Use of Cascading Style Sheets (CSS)
    - Switching experience to a different theme
    - Updating default theme settings
  + Branding Sets and Audiences
    - Use cases for branding sets
    - Audience creation criteria
    - Creating additional audiences
* Page Creation and Editing
  + Introduction to Page Components
    - Page Components walkthrough
    - Installing additional page components
    - Installing additional page components
  + Customizing Page Components
    - Conditional display of components
    - Setup component to conditionally display
  + Working with Pages
    - Review of page types
    - Page Properties
    - Working with multiple form factors
    - Create a new standard page
  + Navigation
    - Navigation Methods
    - Defining menus and menu items
    - Editing the main menu to display additional pages
  + Search
    - Search Functionality
    - Customizing Search Functions
  + Multilingual Support
    - Multilingual Setup
    - Language Selector Component
    - Translation of user-generated content
    - Setup community to support an additional language
* Working with Knowledge
  + Introduction to Salesforce knowledge
    - Article Management
    - Data Categories
    - Setup Salesforce Knowledge and Data Categories
  + Managing Salesforce Knowledge
    - Article Creation
    - Multilingual Capabilities
    - Versioning
    - Publishing
    - Article Creation and Data Category Assignment
  + Exposing Salesforce knowledge in an Experience
    - Levels of Access
* Topics
  + Integration with Data Categories
  + Creation of topics and connecting them to data categories
  + Topic Navigation
  + Navigating knowledge via topics
* Working with Content
  + Introduction To Salesforce CMS
    - Use Cases for Salesforce CMS
    - Overview of functionality
    - Configure CMS app and expose specific content in your experience
  + CMS Connect
    - Use Cases For CMS Connect
* Working with DATA
  + Standard Sharing tools
    - Org Wide Defaults
    - Sharing Rules
    - Standard Sharing Tools as they related to an experience
* Experience Sharing Rules
  + Community Roles
  + Managing Community Roles
  + Sharing Sets
  + Managing Sharing Sets Walkthrough
  + SuperUser Access
  + Managing Super User Access Walkthrough
  + Account Relationships
  + Managing Account Relationships Walkthrough
* Experience Cloud Add-On Options
  + Additional Salesforce Products
    - Sales / Service Cloud
    - Salesforce CPQ
    - Live Agent
    - Commerce Cloud
    - Salesforce.org
    - Marketing Automation
  + Third-Party Products
    - Electronic Signature
    - Document Generation
* Managing user interactions
  + Moderation
    - How does moderation work within an experience?
    - Moderation rule creation
    - Create a moderation rule to flag user posts
  + Gamification
    - Use Cases
    - Configuration of Badges
    - Missions
    - Award a badge automatically when a user reaches 100 posts
  + Reputation Levels
    - Configuring Reputation levels walkthrough
    - Creating and managing reputation levels
  + Chatter
    - Use cases for Chatter within an Experience
    - Chatter Profile
    - Chatter Groups
    - Creating a chatter group that is accessible from within an experience
  + Chatter Answers
    - Use Cases For Chatter Answers
    - Escalation To Case
    - Configuring Chatter Answers for your experience
* Advanced Setup Options
  + Advanced Setup Configuration
    - Optimization
    - Analytics
    - Browser Security
* Deployment
  + Deployment Considerations
    - Deployment to Production
    - Activation
    - Publishing
    - Template Upgrades
* Customer Experience
  + A guided final review exercise to build a customer-facing experience
* Partner Experience
  + A guided final review exercise to included partner relationship management functions into your experience
* Practice Exam and Questions
  + Work through 60 questions in a simulated exam environment
  + Question Review
* Wrap Up and Next Steps
  + Next steps for your exam prep
  + Q & A