

**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