Salesforce.com, Part 1: Introduction

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Prerequisites: This course assumes very little familiarity Salesforce.com. This course is part of 3 courses; Salesforce.com: Introduction; Salesforce.com: Leads and Dashboards; and Salesforce.com: Importing, Manage a Team. Please be sure to view the courses in order if you are new to the material.

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Course description: Salesforce.com is a customer relationship management (CRM) tool that allows you to manage contacts, and track sales activity including leads, sales, and customers. In this three part learning series, get to know Salesforce CRM concepts and user interface. Learn how to manage leads, work with contacts, and track sales opportunities. Make your sales data meaningful with existing or customized reports and Dashboards.

Course outline:

CRM and Navigating Salesforce
• Introduction
• Course Overview
• The Luck Principal
• Understanding CRM Concepts
• CRM Terminology
• Navigating the User Interface
• Salesforce Tabs
• Finding Records
• Planning & Tracking Activities
• The Virtuous Cycle
• Schedule a Meeting Request
• Summary

Outlook, Chatter and Help
• Introduction
• Using Salesforce with Outlook
• Track Email in Salesforce
• Sync Events, Tasks & Contacts
• Administrative Settings
• Collaborating with Chatter
• Using Chatter Groups
• Posting Comments
• Chatter for Desktop & Mobile
• Getting Help with Salesforce
• Summary