

Quick Start Guide to Salesforce



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What is Salesforce?

Salesforce is a cloud-based CRM platform that offers nearly 2,700 applications for sales, service, marketing, and etc. to companies globally. As of early 2016, Salesforce has had over 150,000 customers across the world. In the world of CRM, Salesforce dominates with a 19.7% market share.

Sales Cloud
The world's #1 customer relationship management (CRM) and sales force automation solution.
[LEARN MORE ABOUT SALES CLOUD](#)

Analytics Cloud
Business intelligence software to explore data, get answers instantly and take actions fast.
[LEARN MORE ABOUT ANALYTICS CLOUD](#)

Service Cloud
The world's #1 customer service application. Our cloud-based solution for service, support and case management.
[LEARN MORE ABOUT SERVICE CLOUD](#)

Community Cloud
Online self-service communities that connect customers, partners and employees directly to the information they need.
[LEARN MORE ABOUT COMMUNITY](#)

Marketing Cloud
Create personalised, cross-channel marketing campaigns across email, mobile, social, web and more.
[LEARN MORE ABOUT MARKETING CLOUD](#)

Salesforce Platform
The #1 cloud application development platform.
[LEARN MORE ABOUT SALESFORCE PLATFORM](#)

IOT Cloud
Harness the power of the Internet of Things. Connect data from every device, sensor, website, and interaction with Salesforce to get an even more complete view of your customers.
[LEARN MORE ABOUT IOT CLOUD](#)

WHO is Trailhead for?

Trailhead is designed for students and professionals that are seeking to advance their knowledge in the CRM applications that majority of the Fortune 500 companies utilize.

WHY do you need it?

The Martin Tuchman School of Management is seeking to ensure that students and faculty have the opportunity to get certified in Salesforce to bring you ahead of your class especially when it comes to an Internship, Co-op, or a Full-time job. Being familiar and certified with Salesforce applications allows you to build your skill set with the CRM platform through hands-on training.

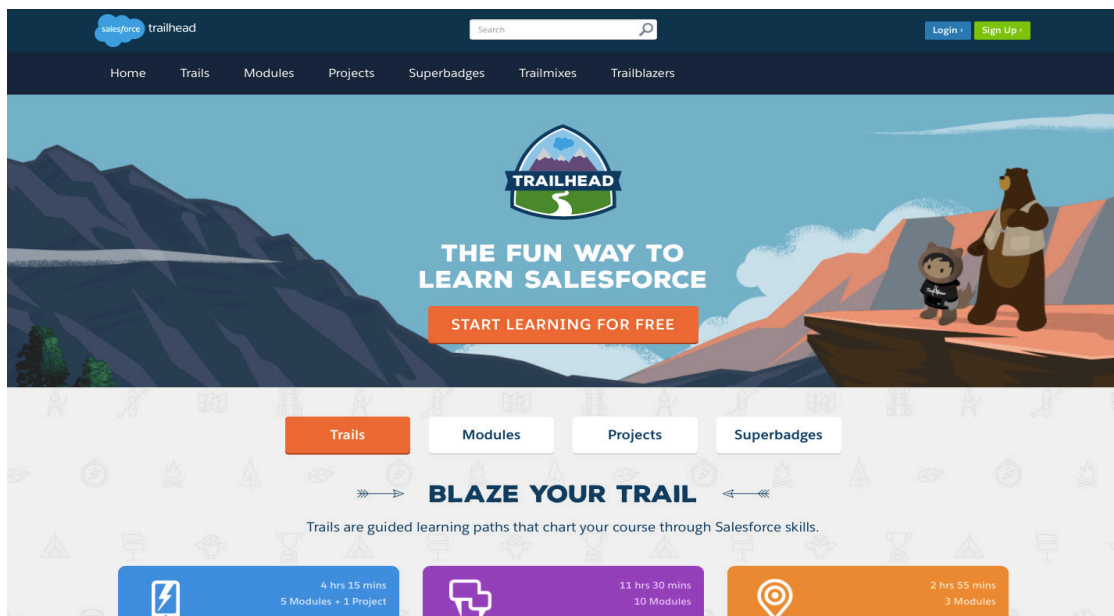
WHY do other corporations utilize Salesforce?

Many corporations utilize Salesforce because it is efficient, affordable, and also offers a wide variety of products and services. These CRM services can be accessed on multiple domains, and easily intergrates with third party applications.

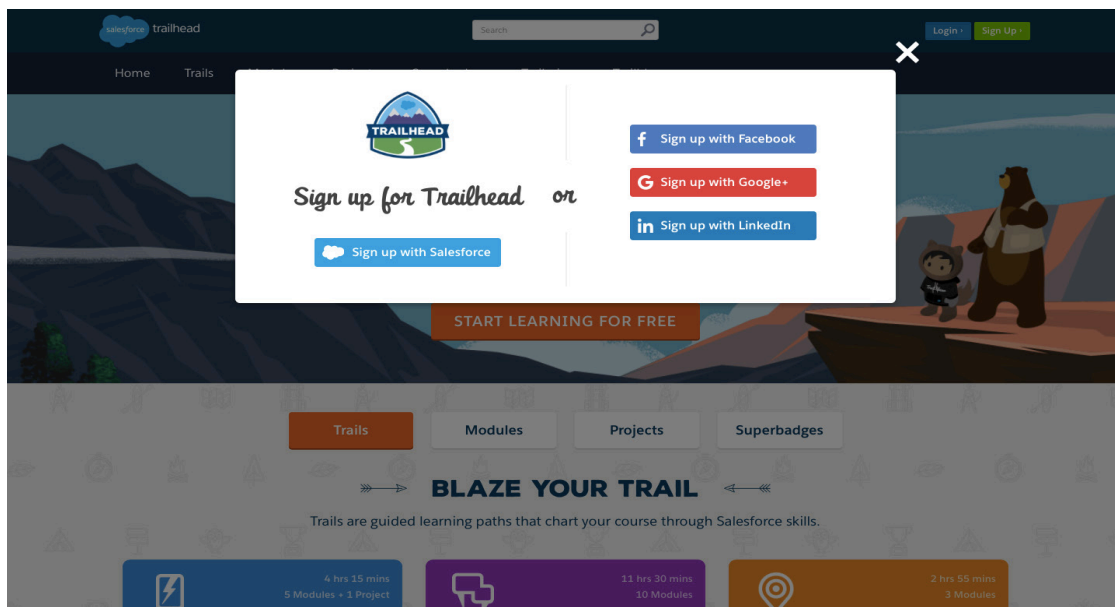
Creating a Salesforce Account

In order to begin your journey with Salesforce, enter the following link into your search tab:

<https://trailhead.salesforce.com>



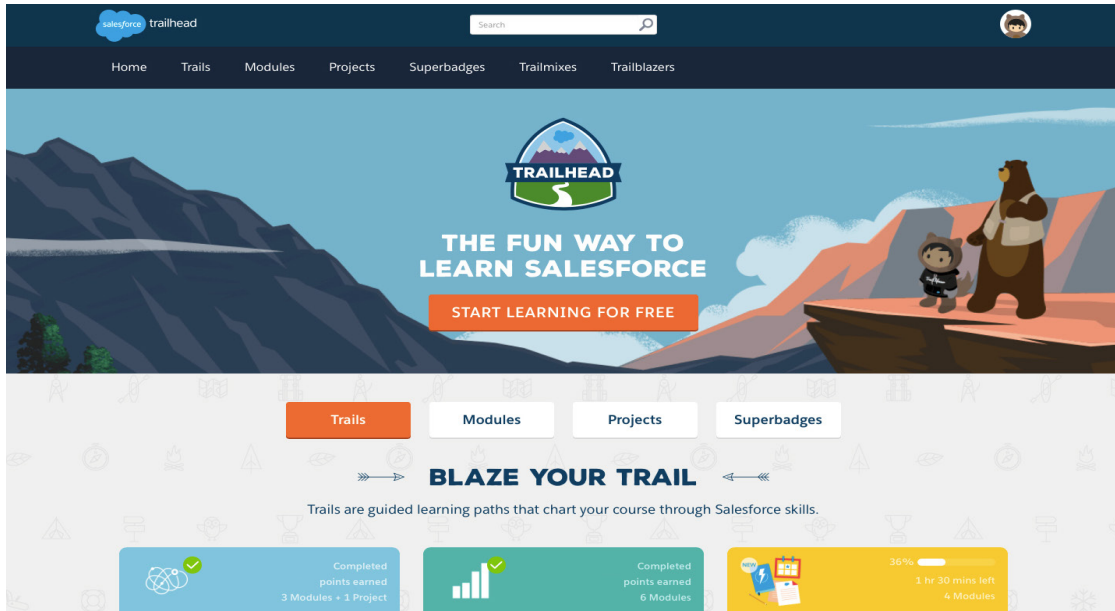
Once you arrive onto the home page, you will find two links on the top right-hand corner. Click on the "Sign Up" button.



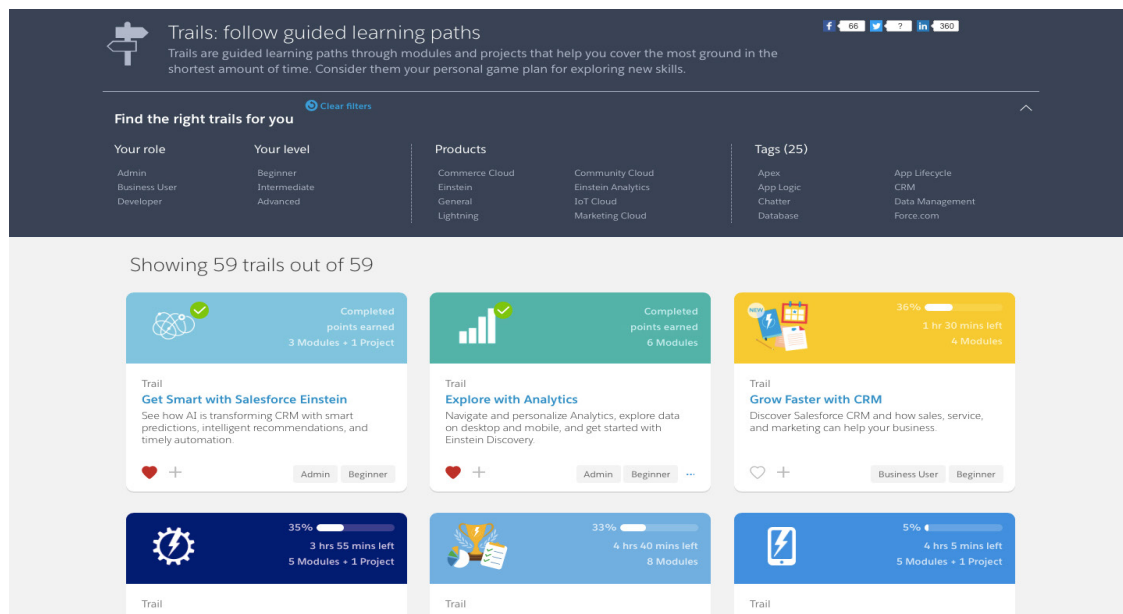
Select one of the following options to create your account on Salesforce.

Exploring: Trails

Now that you have created an account to save your progress, let's review the various certification options you can now access.



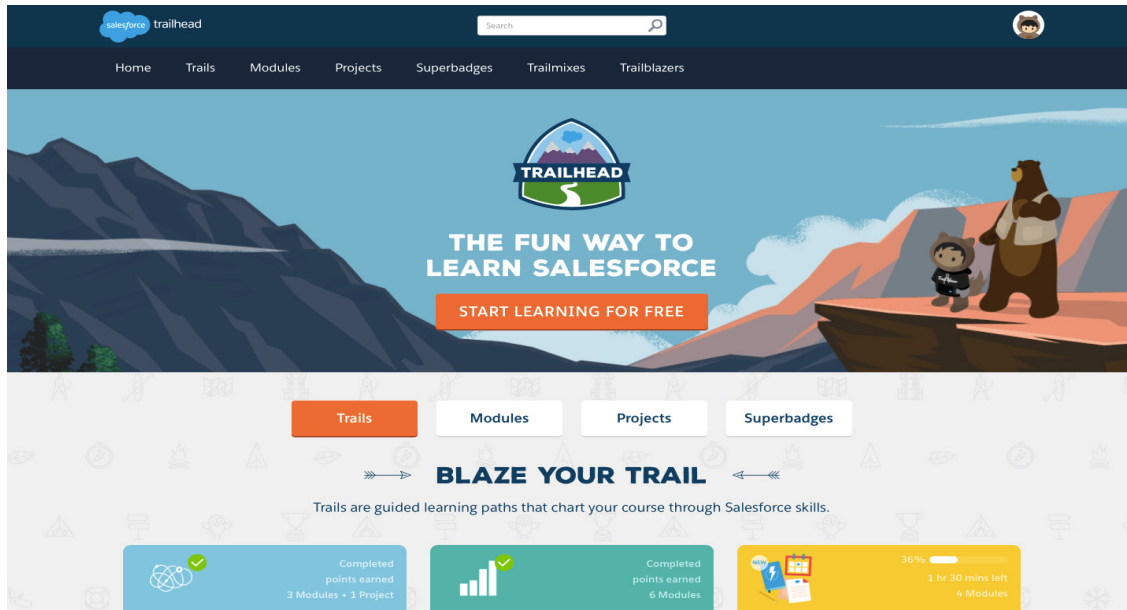
On the top left-hand corner of the screen, you will find a series of tabs listed under the Salesforce logo. Click on "Trails".



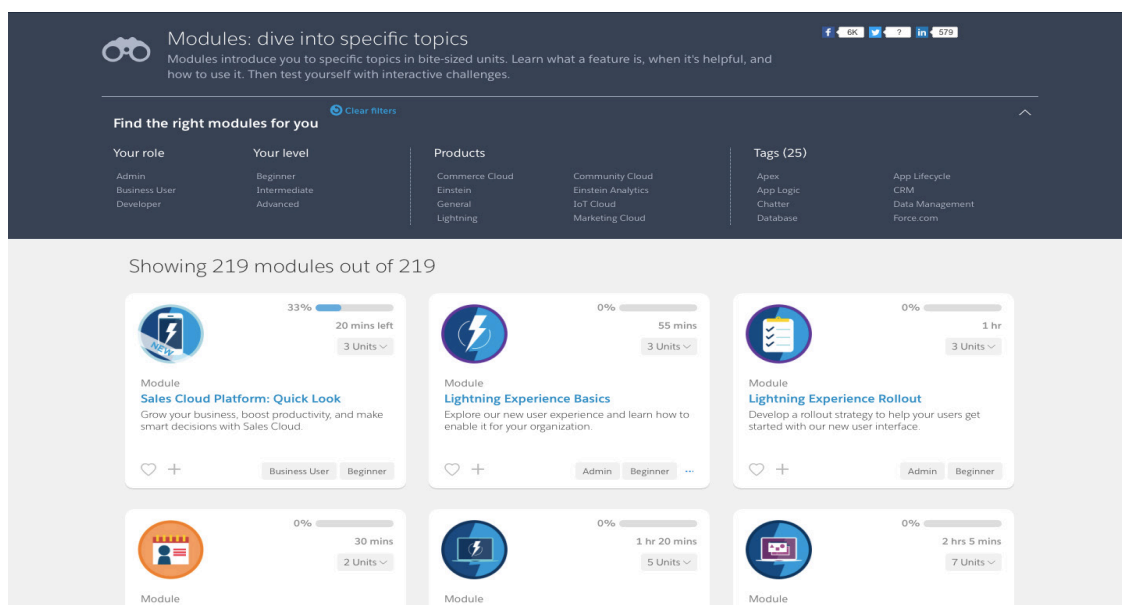
Essentially, Trails focus on the user attaining the necessary skills and information through relevant modules and projects. They are called "Trails" because it follows through one course while including various activities within.

Exploring: Modules

Now that we have understood the purpose of Trails, let's explore Modules!



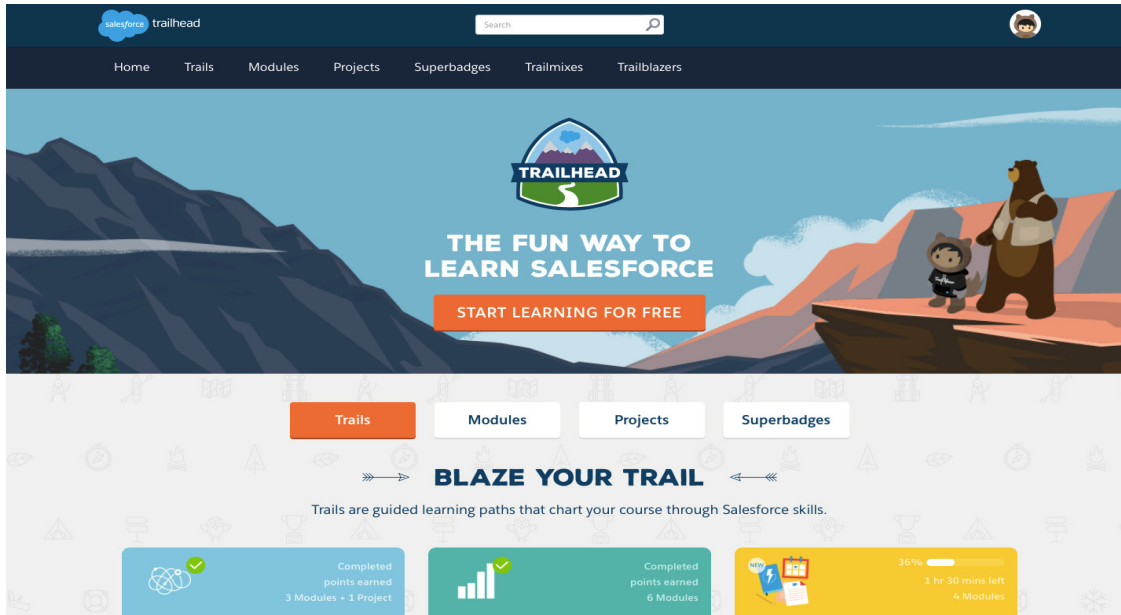
On the top left-hand corner of the screen, Click on "Modules" in the series of tab listed under the Salesforce logo.



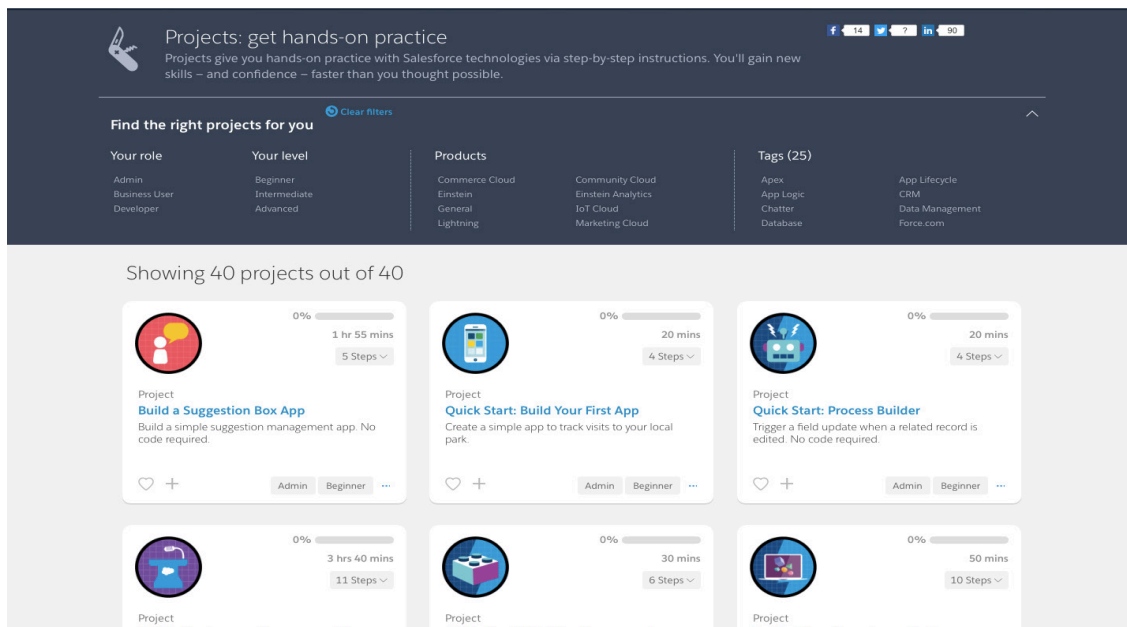
Modules dive into more specific subjects in comparison to Trails. As you go along each module, it will inform you on the purpose of the tool you are learning about, how to effectively utilize it, and provide interactive challenges to apply these skill sets to good use.

Exploring: Projects

We know about Trails and Modules. Let's explore Projects!



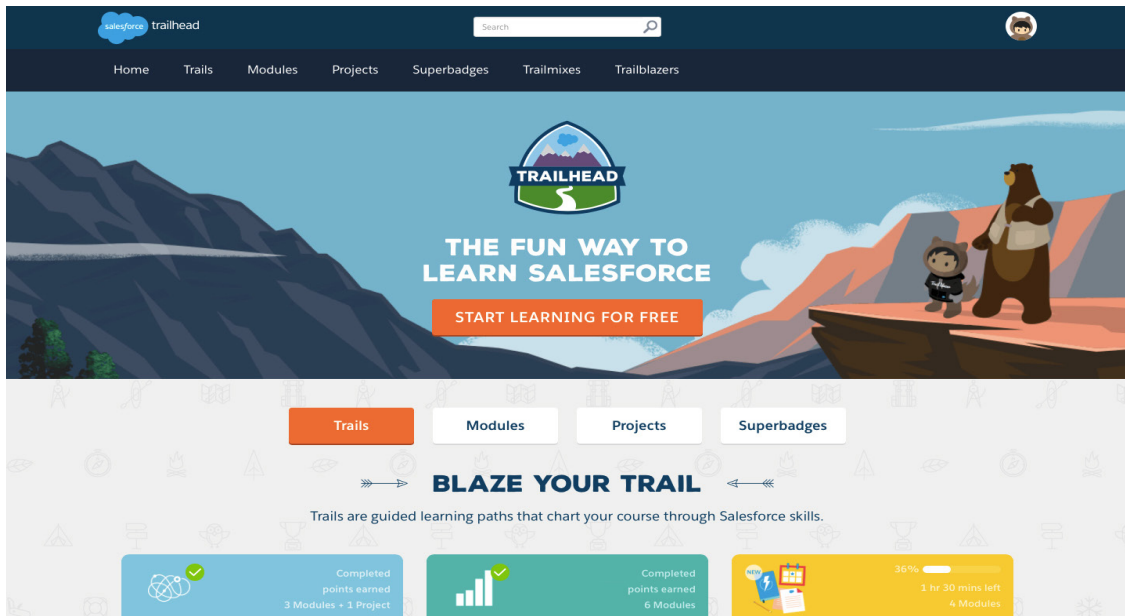
On the top left-hand corner of the screen, Click on "Projects" in the series of tab listed under the Salesforce logo.



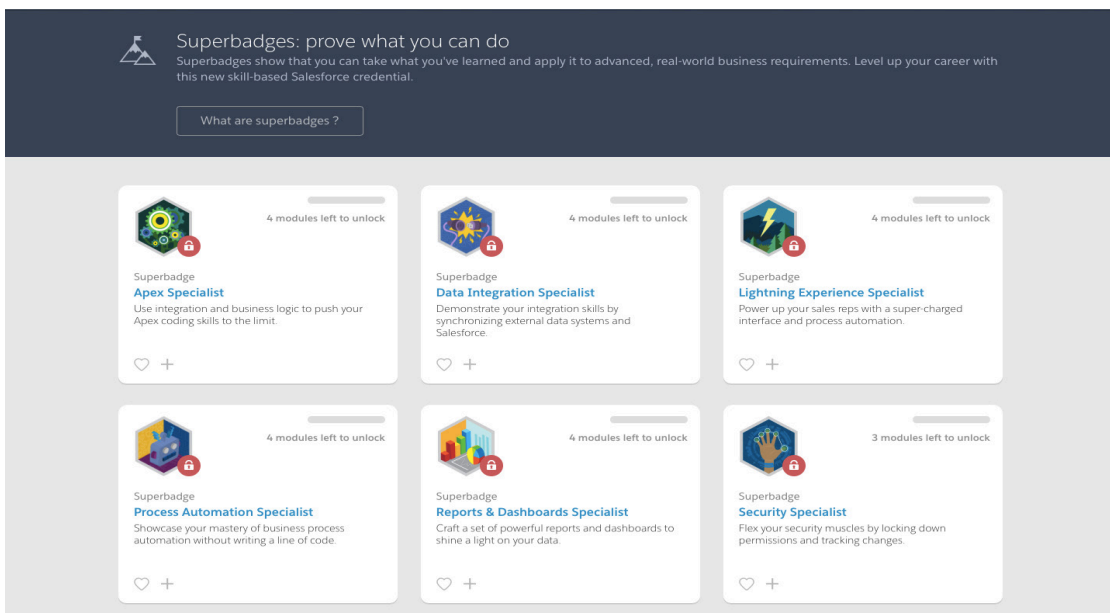
Projects allow you to expand your knowledge, and broaden your skill sets with the use of hands-on practice with Salesforce technologies through step-by-step instructions.

Exploring: Superbadges

Last, but surely not the least, let's go over Superbadges!



On the top left-hand corner of the screen, Click on "Superbadges" in the series of tab listed under the Salesforce logo.

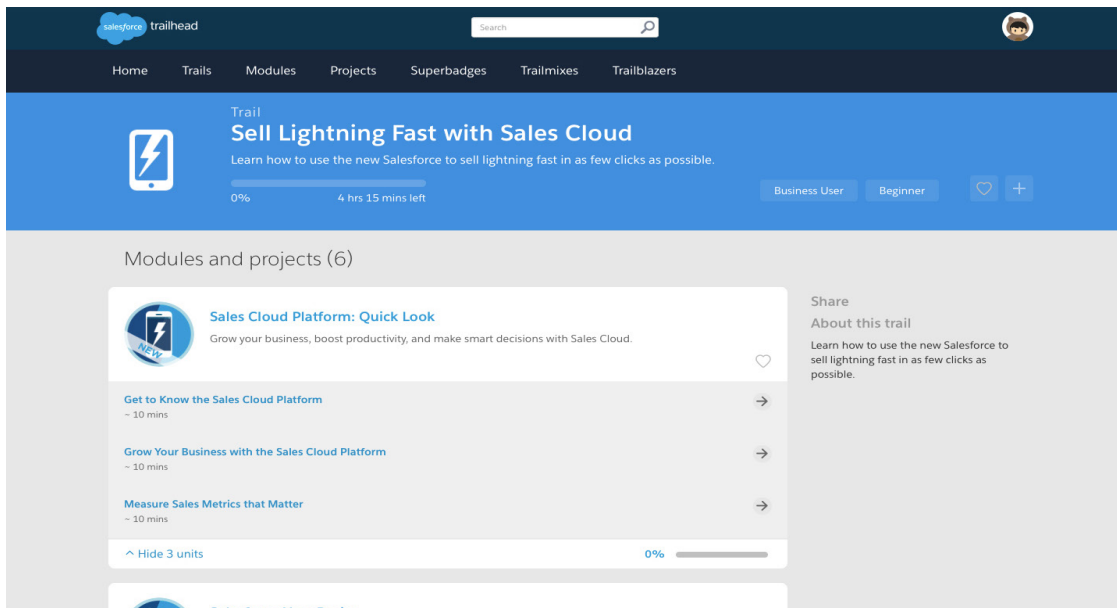


Note: Make sure to check which modules you are required to complete prior to advancing to Superbadges

Once you have completed a sufficient amount of Trails and Modules, you will be able to unlock Superbadges. This skill-based credential allows you to use what you have learned and apply it to advanced business requirements.

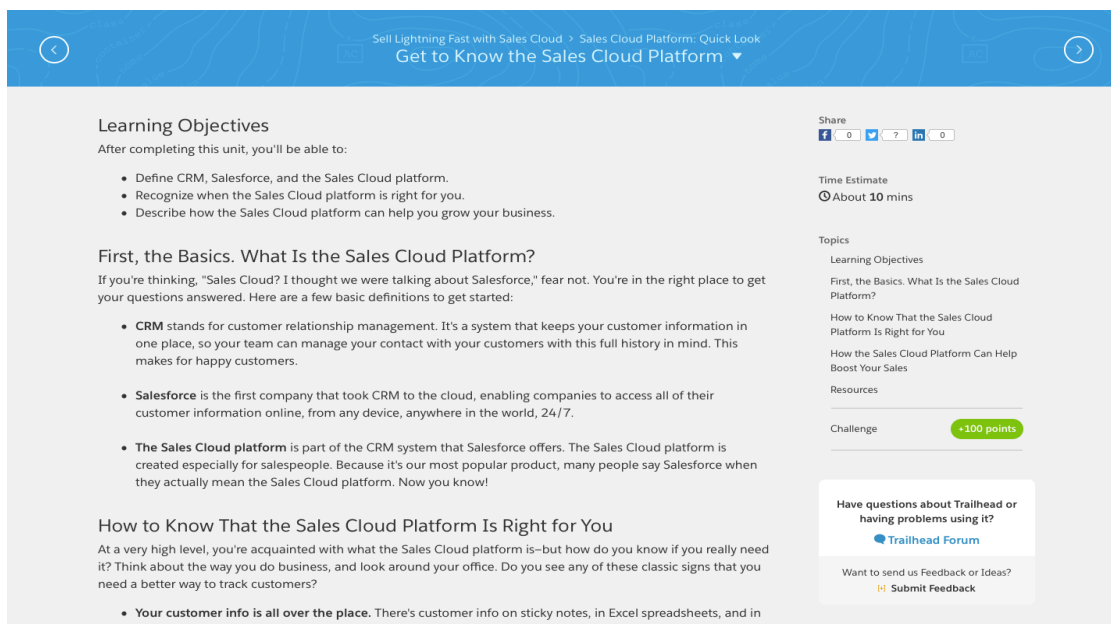
How To: Complete a Module

Under the Trails tab, select a Trail that you wish to begin.



For the purpose of a demo, the Trail selected here is titled “Sell Lightning Fast with Sales Cloud”.

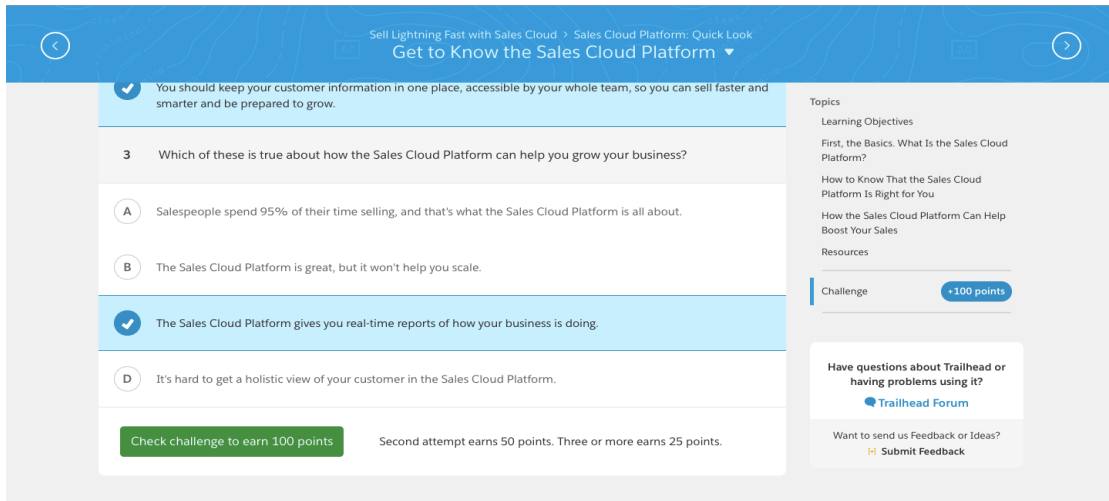
The first Module under this Trail is called “Get to Know the Sales Cloud Platform”.



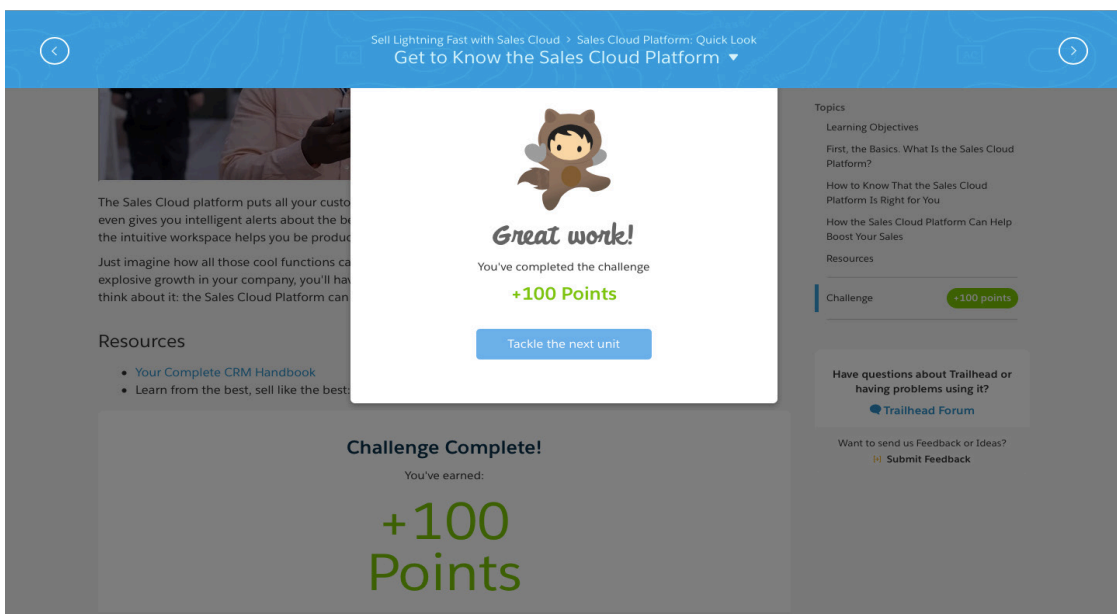
This module is suggested to take approximately 10 minutes to complete. Read thoroughly through the information given, and begin the challenge at the end, which is set to be worth 100 points.

How To: Complete a Challenge

Once you get towards the end of a challenge, click “Check challenge to earn 100 points”.



Keep in mind that the second attempt earns 50 points, and three or more earns 25 points.



Congratulations! You have completed your first unit.

Just the Essentials

NJIT students also have customized “Trailmixes”, which are essentially paths that can be pursued based on your personal time commitment and schedule.

Visit our website at: <https://businessanalyticslabnjit.wordpress.com> to access the following Trailmix.

Duration: 6 Hours and 45 Minutes

Week 1	Module: CRM Basics
Week 2	Module: Salesforce Cloud Benefits
Week 3	Module: Analytics Basics
Week 4	Module: Sales Cloud: Quick Look
Week 5	Module: Salesforce User Tour
Week 6	Module: Accounts & Contacts
Week 7	Module: Leads & Opportunities
Week 8	Module: Marketing Cloud Basics
Week 9	Modules: IoT Basics
Week 10	Module: Artificial Intelligence
Week 11	Modules: Lightning Experience Basics

Hooked on Salesforce

Visit our website at: <https://businessanalyticlabnjit.wordpress.com> to access the following Trailmix.

Duration: 9 Hours and 55 Minutes

Week 1	Module: Sales Cloud Einstein
Week 2	Module: Data Management
Week 3	Module: User Management
Week 4	Module: Data Modeling
Week 5	Module: Lightning Experience Rollout
Week 6	Module: Knowledge Basics
Week 7	Module: Products, Quotes, & Contracts
Week 8	Module: Process Automation
Week 9	Module: Large Data Volumes
Week 10	Module: Email Marketing Strategies

All In

Visit our website at: <https://businessanalyticslabnjit.wordpress.com> to access the following Trailmix.

Duration: 20 Hours and 15 Minutes

Week 1 **Trail:** Sell Lightning Fast with Sales Cloud

Week 2 **Trail:** Personalize Your Customer Journeys with Marketing Cloud

Week 3 **Trail:** Explore with Analytics

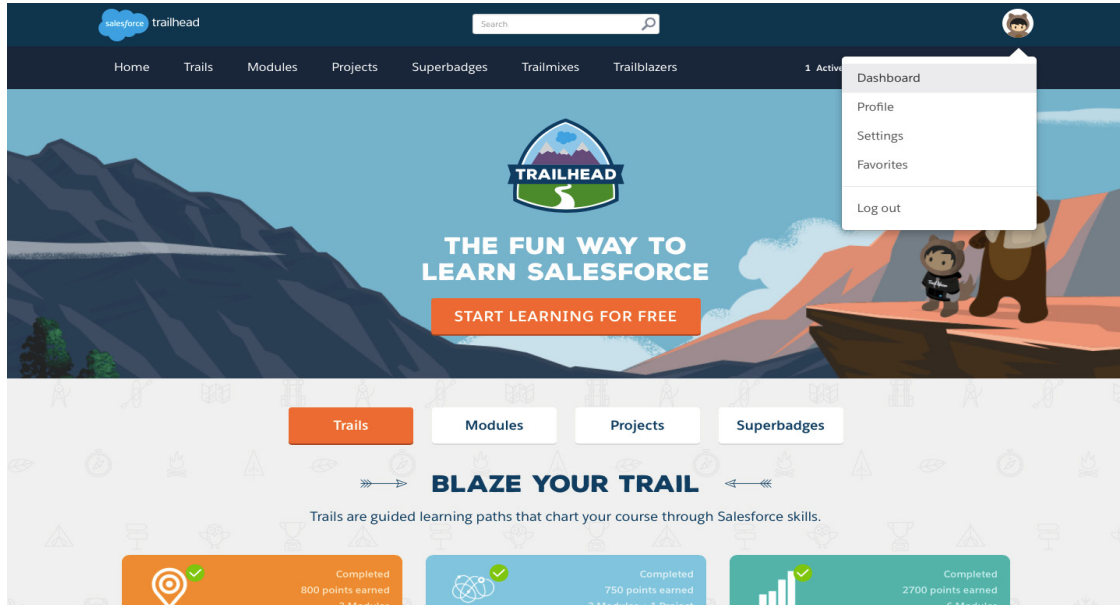
Week 4 **Trail:** Engage Customers with IoT Cloud

Week 5 **Trail:** Discover Advanced Service Cloud Features

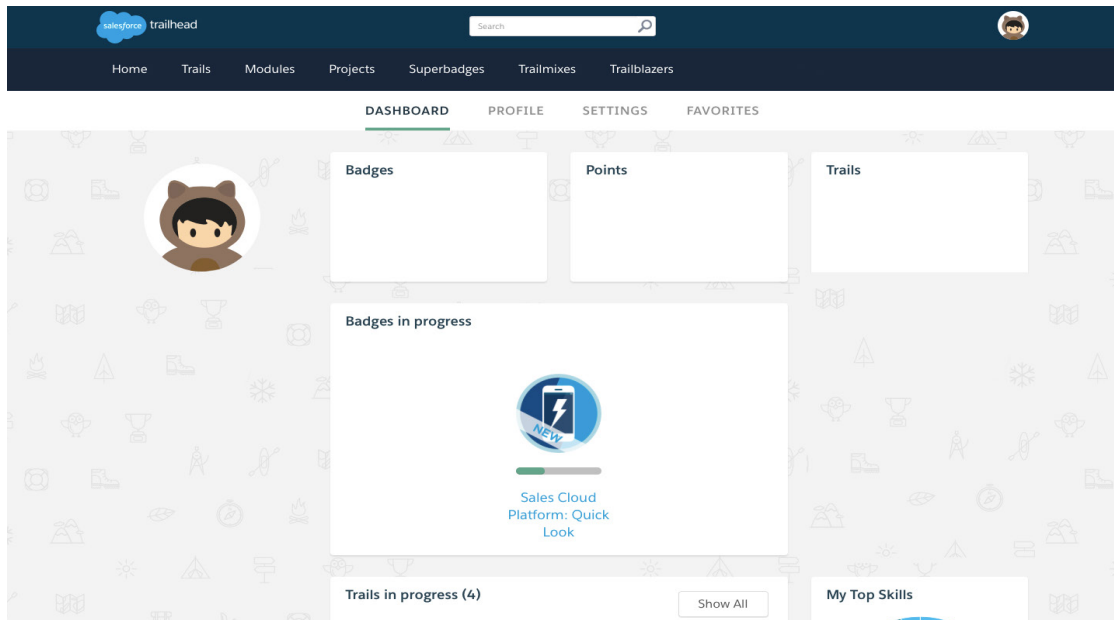


Dashboard

On the top right-hand corner, click on the profile icon to unveil the drop down screen.



Click on the first tab, labeled "Dashboard".



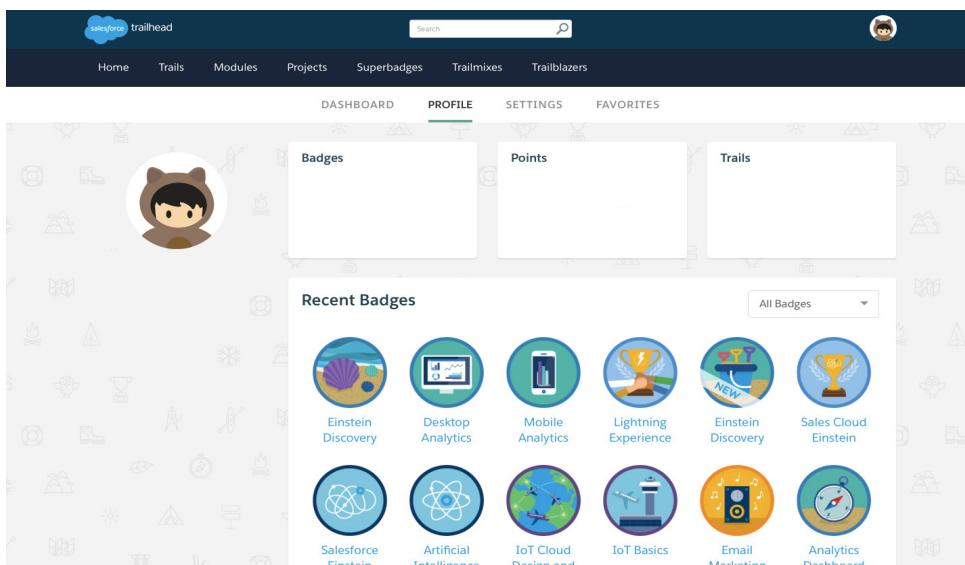
Dashboard is used to view your current ranking, how many points you have acquired, as well as details regarding your progress.

Profile

On the top right-hand corner, click on the profile icon to unveil the drop down screen.



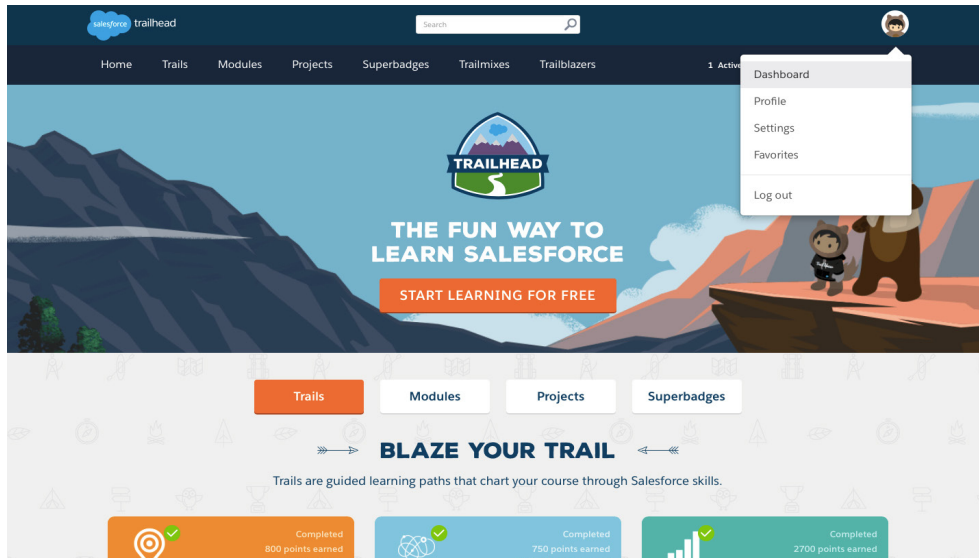
Click on the first tab, labeled "Profile".



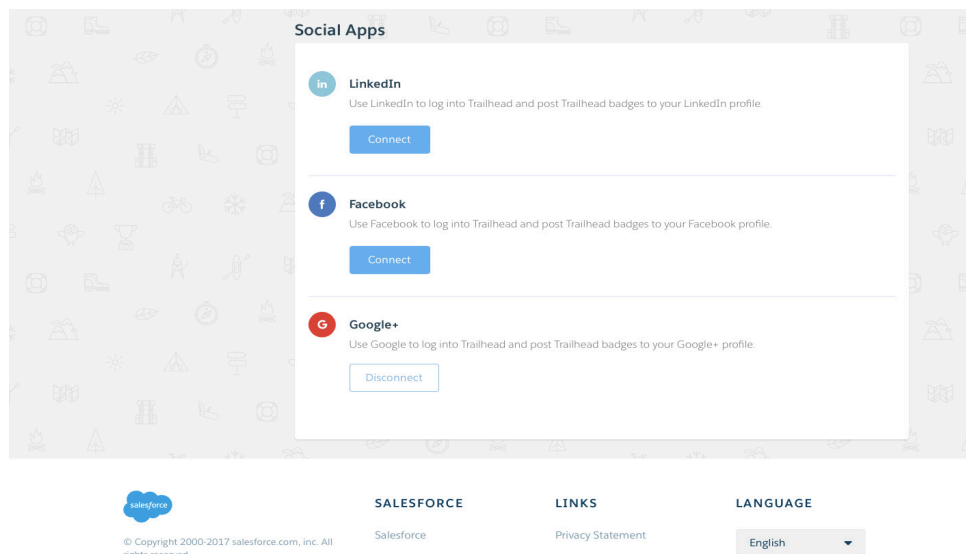
View all of the badges you have acquired out of 300+ Trailhead badges, and the Trails you have completed in the Profile Tab.

Settings

On the top right-hand corner, click on the profile icon to unveil the drop down screen. Click on the first tab, labeled “Settings”.



Under Settings, you will be able to connect any of your other accounts to your Salesforce account. Be sure to connect your LinkedIn account in order to add any badges you acquire during your Trails into your LinkedIn profile under “Certifications”.



Want to learn more about Salesforce?

Be sure to join us at the following events:

Salesforce SLS 101 & SLS 201 Boot Camp

October 30th - November 3rd

Time may vary depending on dates

Register at:

salesforce_bootcamp.eventbrite.com

Limited Capacity! Make sure to register in advance.