

Accenture Salesforce Hackathon

*Salesforce Solutions
for a sustainable business*

Day One - Pre - Requisite &
Introduction to Salesforce Platform

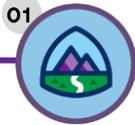
26th April 2022

ACCENTURE SALESFORCE ACADEMY TECH TRAINING LAB – HIGH LEVEL AGENDA



RACHEL

0 Pre - Requisite



Trailhead Basic



Trailhead Playground Mng



Trailhead Navigation

1 Introduction to Salesforce Platform



Salesforce CRM



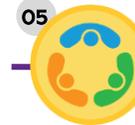
Salesforce Platform Basics



Sales Cloud Basics



Service Cloud Basics



Experience Cloud Basics



Setup: Quick Look

2 User Management & Sales Cloud



User Management



Account & Contacts



Leads & Opt



Products, Quotes, & Contracts

3 Customization



Data Modeling



Data Management



Customize a Salesforce Object



Lightning Experience Customization



Lightning App Builder

4 Service Cloud & Productivity Tool



Service Cloud for Lightning Experience



Reports & Dashboard



Create Reports and Dashboards

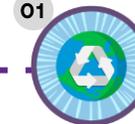


Chatter for Lightning Exp

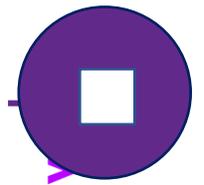


Knowledge Basics for Lightning Exp

5 Sustainability



Sustainability Concept



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ACCENTURE SALESFORCE ACADEMY

TECH TRAINING LAB – HIGH LEVEL AGENDA – DAY 1

0 Pre – Requisite



RACHEL



Trailhead
Basic



Trailhead
Playground Mng



Trailhead
Navigation

1 Introduction to Salesforce Platform



Salesforce
CRM



Salesforce
Platform Basics



Sales Cloud
Basics



Service Cloud
Basics



Experience
Cloud Basics



Setup: Quick
Look



ACCENTURE SALESFORCE ACADEMY

TECH TRAINING LAB – LOW LEVEL AGENDA – DAY 1

Modules	Unit Details	Mins
<u>Salesforce CRM</u>	<u>Get Started with Salesforce CRM</u>	25 min
	<u>Navigate Around</u>	15 min
<u>Salesforce Platform Basics</u>	<u>Get Started with the Salesforce Platform</u>	10 min
	<u>Discover Use Cases for the Platform</u>	10 min
	<u>Understand the Salesforce Architecture</u>	10 min
	<u>Navigate Setup</u>	10 min
	<u>Power Up with AppExchange</u>	10 min
<u>Sales Cloud Basics</u>	<u>Get to Know Sales Cloud</u>	10 min
	<u>Grow Your Business with Sales Cloud</u>	10 min
	<u>Measure Sales Metrics that Matter</u>	10 min
	<u>Learn About the Salesforce Platform Advantage</u>	10 min
<u>Service Cloud Basics</u>	<u>Get to Know the Service Cloud Platform</u>	10 min
	<u>Resolve Cases Faster</u>	10 min
<u>Experience Cloud Basics</u>	<u>Get Started with Experience Cloud</u>	10 min
	<u>Engage with Your Customers</u>	15 min
	<u>Engage with Your Partners</u>	15 min
<u>Setup: Quick Look</u>	<u>Learn to Use Setup and the Object Manager</u>	10 min

ACCENTURE SALESFORCE ACADEMY

LEARNING OBJECTIVE – PRE-REQUISITE

After completing the pre-requisite trailmix, you'll be able to:

- Navigate Trailhead effectively
- Create you own playground



Pre - Requisite

In detail, you'll be able to:

- Explain the difference between a module and a project
- Identify exactly which module is right for your journey
- Get Your Trailhead Playground Username and Password

ACCENTURE SALESFORCE ACADEMY TRAILHEAD BASICS



Site URL: <https://trailhead.salesforce.com/>

The screenshot shows the Trailhead website homepage. At the top left is the Trailhead logo. To its right is a search bar with the placeholder text "Search for modules, trails, and more...". Further right are "Sign Up" and "Log In" buttons. Below the search bar is a navigation menu with links for "Home", "Learn", "Credentials", "Community", "For Companies", and "COVID-19". The main content area features a large illustration of a forest landscape with a waterfall on the left, a small character in a bear costume, and a larger bear character holding a "TRAIL MAP" on the right. The text "SKILL UP FOR THE FUTURE" is centered, with the subtitle "Learn new skills from anywhere" below it. An orange button labeled "Get Started for Free" is positioned in the center. Below the illustration, the text "TRAILHEAD IS THE FUN WAY TO LEARN" is displayed. At the bottom of the page, there are three icons: a book with a star, a document with a plus sign, and a globe with a heart.

ACCENTURE SALESFORCE ACADEMY TRAILHEAD BASICS



*Let's get started,
Trailblazer!*

How do you want to sign up?

-  [Salesforce](#)
-  [Google](#)
-  [LinkedIn](#)
-  [Email](#)

[More options](#) · [Log In](#)

ACCENTURE SALESFORCE ACADEMY

TRAILHEAD BASICS

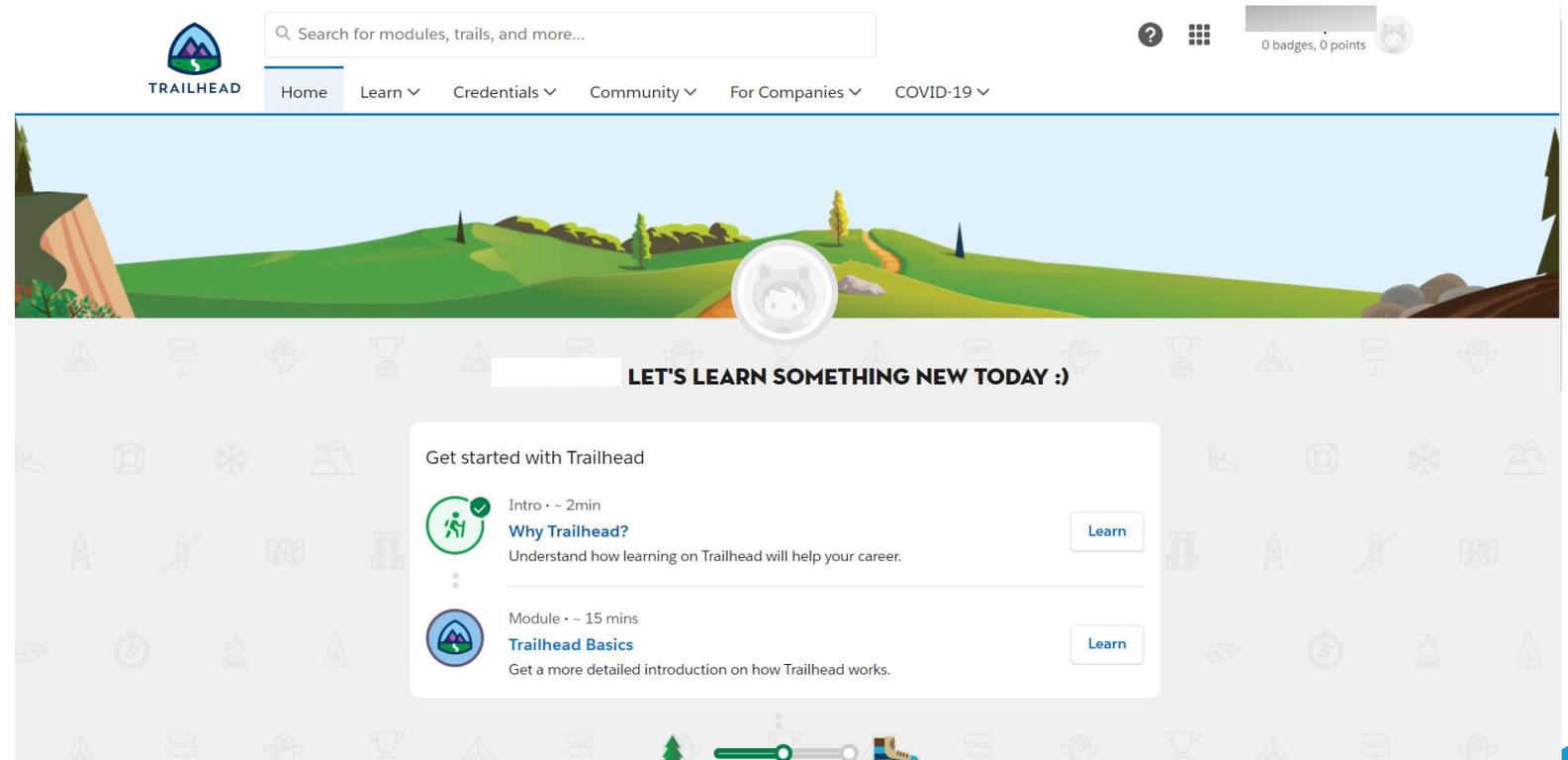


How Does It Work?

In Trailhead, **Trails** are groups of modules that provide guided learning paths suited to specific roles or needs. Learning topics are organized into **modules**, which are broken up into **units**. To finish a unit, you earn points by completing a quiz or a challenge. A quiz checks your knowledge with multiple-choice questions, while a challenge tests your skills by getting your hands dirty in a Salesforce org. Once you've finished all of the units in a module, you get a shiny new **badge** for your profile.

Trailhead content blends a variety of content types and approaches to cater to all types of learners, including:

- Videos
- Code samples
- Walkthroughs
- Screenshots
- Images
- Tables and charts
- Step-by-step instructions



ACCENTURE SALESFORCE ACADEMY

TRAILHEAD PLAYGROUND MANAGEMENT



What is?

Trailhead Playground is an org that you can use for hands-on challenges, learning new features, and testing customizations.

In every hands-on challenge and project step verification, you'll see the name of a hands-on org and a Launch button. Trailhead automatically chooses your most recently used org or, if you've tried the challenge before, the org you last used for that particular challenge. If you've never used a hands-on org before, Trailhead defaults to your most recently created playground. You can always select the org you want to work in by clicking the name of your org and choosing a different one from the list.

Verify Step +100 points

You'll be completing this project in your own hands-on org. Click Launch to get started, or click the name of your org to choose a different one.

Do you use Salesforce in a language other than English? Set the language of your hands-on org to English before you attempt this project. Want to find out more about using hands-on orgs on Trailhead? Check out [Trailhead Playground Management](#).

Curious Shark Playground
Created on 7/28/2020

Launch

Verify step to earn 100 points

ACCENTURE SALESFORCE ACADEMY CREDENTIAL



What's a Credential?

Trailhead is your portal for learning more about Salesforce credentials. There are currently two types of credential: superbadges and Salesforce certifications.

You earn a **certification** by taking a proctored exam that tests your skills. Salesforce certifications are world-class credentials that demonstrate your abilities to work with Salesforce technology.

You earn a **superbadge** by working hands-on in a Trailhead Playground, like you would to earn a module or project. superbadges help you learn across an entire feature area by providing a real-life business scenario for which you have to build a solution.



ACCENTURE SALESFORCE ACADEMY TECH TRAINING LAB



ACCENTURE SALESFORCE ACADEMY

LEARNING OBJECTIVE

Introduction to Salesforce Platform

After completing the introduction trailmix, you'll be able to:

- 
- 
- Describe what Salesforce is.
 - Describe what CRM is.
 - Define the Salesforce platform.
 - Describe the benefits of Experience Cloud.

In detail, you'll be able to:

- Identify exactly which module is right for your journey
- Define CRM, Salesforce, and Sales Cloud.
- Define what is an App, an object, a record, and a field
- Define Service Cloud, Experience Cloud
- Define what is the App Exchange

ACCENTURE SALESFORCE ACADEMY TECH TRAINING LAB



Question:

What is CRM ?

What do you think Salesforce is?

CRM FOR LIGHTNING EXPERIENCE

CRM DEFINITION



CRM FOR LIGHTNING EXPERIENCE

CRM DEFINITION



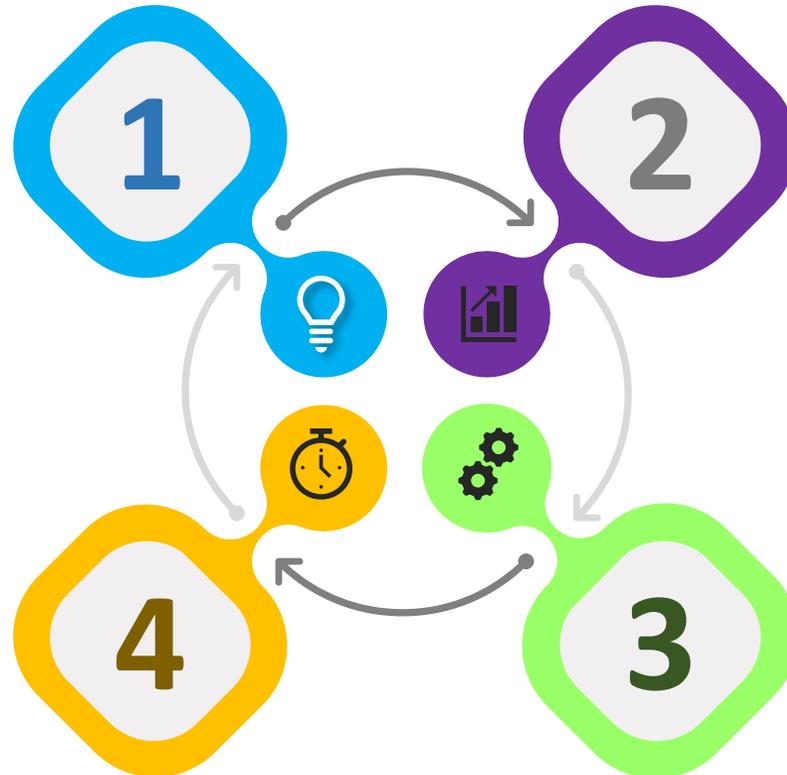
Customer Relationship Management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability.

Some of the main benefits that come from CRM are:

1

Efficiency

Replacement of manual processes



Data

2

Utilising data to understand customers habits and behaviour

4

Accountability

Ensuring customers don't "fall through the cracks" and help employees understand their responsibilities

Collaboration

3

Cohesion between internal & external entities

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CRM FOR LIGHTNING EXPERIENCE

SALESFORCE DEFINITION



Salesforce is an entirely **cloud-based CRM solution**.

Salesforce has everything you need to run your business from **anywhere**. Using **standard products and features**, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and **store your data securely in the cloud**. It stores your customer data, gives you processes to nurture prospective customers, and provides ways to collaborate with people you work with

How **Salesforce** organizes your data?

- An **object** is comprised of its field definitions and records.
- A **field** is one data point within an object.
- A **record** is row of field data within an object.
- A **tab** is used to expose an object and its data to the end user through the interface.

Salesforce supports two most common types of objects: **Standard** or **Custom**

App Set of objects, fields and other functionalities that support a business process

Org your salesforce instance

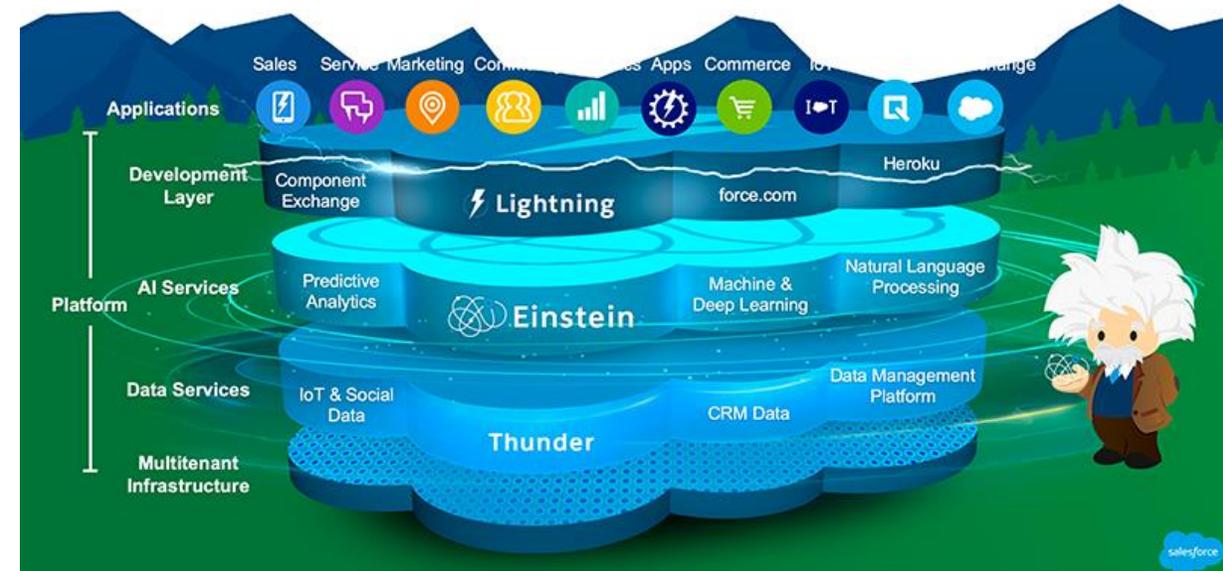
	ACCOUNT NAME	ACCOUNT SITE	BILLING STATE	PHONE	TYPE
1	Burlington Tex.		NC	(338) 222-70...	Customer - Di...
2	Deceason pic		KS		Customer - Ch...
3	Edge Commu		TX		Customer - Di...
4	Express Logis		OR	(503) 422-78...	Customer - Ch...
5	GenePoint		CA	(650) 867-34...	Customer - Ch...
6	Grand Hotels		IL	(312) 996-30...	Customer - Di...

SALESFORCE PLATFORM BASICS

SALESFORCE ARCHITECTURE

Salesforce Architecture is the multilayer architecture; it contains a series of layers situated on the top of each other.

Trust.salesforce.com is Salesforce's website which provides transparent status details on service availability, performance, security, privacy, and compliance in order to instill trust and confidence in our service.



Salesforce.com is based on **multi-tenant** architecture. Multi-tenant systems place the data from multiple companies (org in Salesforce) on the same server, generally separating them from each other via a simple partition that prevents the data from migrating from one company to another.

SALESFORCE PLATFORM BASICS

APP EXCHANGE

AppExchange is the Salesforce store, empowering businesses to extend the functionality of Salesforce across every department and industry. It's an ecosystem of over 5,000 ready-to-install solutions, 80,000 peer reviews, and 6 million customer installs to help solve any business challenge.



SALES CLOUD BASICS

SALES CLOUD



SALES CLOUD BASICS

SALES CLOUD



Sales Cloud is the SFDC application dedicated to the Sales Team.

Sales Cloud puts all your customer information in **one place**, gives you **insight** into your customers, and even gives you **intelligent alerts** about the best leads.

How sales cloud improve your sales processes:

- Automatically Prioritize and Route Leads
- Manage Your Pipeline from Lead to Close
- Guide Sales Rep through Sales Cycle thanks to Sales Path
- Make Progress from Anywhere with the Salesforce Mobile App
- Embrace Automation and Free Your Reps from Manual Data Entry (Automated Workflows - Emails Automatically Tracked)

Automated Workflows: By automating your sales process, your reps can skip the busywork and take the right actions at the right time. With Sales Cloud, you can manage workflows and process with point-and-click tools.

Emails Automatically Tracked: Connect your email to Salesforce, so reps can update their records effortlessly and send one-to-many messages with one click.

SALES CLOUD BASICS

SALES CLOUD



With Sales Cloud you can see how your sales team is doing in real time with report and dashboard
It's possible to monitor pipeline with:

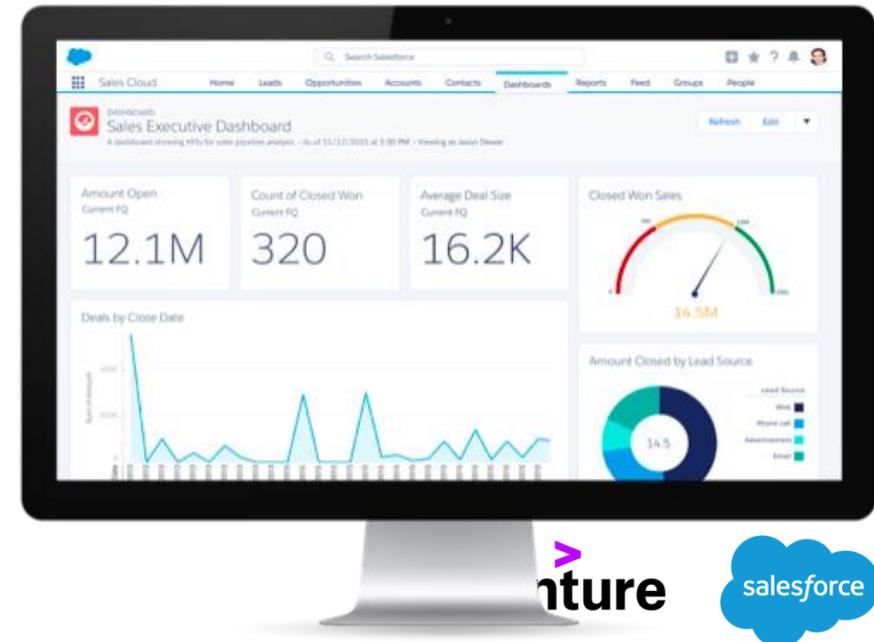
- Forecast Report
- Opportunity Kanban

Salesforce is designed to bring together siloed sales and service organizations with Service Cloud and Sales Cloud. They're built on the same platform, giving sales, service, and the entire organization a 360-degree view of each customer. That complete understanding translates to happy customers and more dollars.

Service Cloud + Sales Cloud = Lots of Revenue

Here's what using Service Cloud and Sales Cloud on one platform can do:

- Empower sales teams with customer intelligence
- Service can help close the deal
- Keep your customers coming back for more



SERVICE CLOUD BASICS

SERVICE CLOUD



SERVICE CLOUD BASICS

SERVICE CLOUD



Service Cloud is the SFDC platform dedicated to Customer Support, that can operate anywhere, and on any device on **Multiple Channels** (Email, phone, SMS, social media, self-service sites, or real-time web chat)

The main advantages can be recap as follows:

- Automatic Management/Assignment of Customer Care Process.
- 360° Customer View
- Customized view to better support the client
- Support through different channels (e.g. Communities – Chatbot)
- Possibility to offer support also to internal teams not office-based (Mobile Employee Field Service Lightning)

Resolve case faster

Case is the object depute to track Customer's requests/claims.

Communities Portal dedicated to the clients

Knowledge Articles that contains useful info to help both Contact Center Operators and Customers

Macro Automation tool that allow to automate repetitive tasks

Support Channels can be implemented also on external Websites and apps (e.g. Live Chat/Knowledge)

Sales + Service = Happy Customers

EXPERIENCE CLOUD BASICS

COMMUNITY CLOUD



EXPERIENCE CLOUD BASICS

COMMUNITY CLOUD



Community Cloud is an online social platform from Salesforce that enables companies to connect customers, partners, and employees with each other and the data and records they need to get work done. Salesforce Community Cloud offers a variety of options: you can build a portal, a help forum, a support site, intranet etc.



Community License Types each license determines the level of access to objects and features

- External Apps → For B2C use cases, minimal interaction with Salesforce records
- Customer Community → For Customer Portal, limited functionalities
- Customer Community Plus → More complex Use Cases, includes Report&Dashboard but not Sales scenarios
- Partner Community → For Partner Relationships, B2B scenarios. Access to Opportunities, Leads and Campaigns
- Channel Account → Similar to Partner Community but It' just packaged differently

Every community user has to be associated with an Account



EXPERIENCE CLOUD BASICS

COMMUNITY CLOUD



Experience Builder lets you quickly create and style your custom community to match your organization's branding. **Partner Portal** allows partner users outside of your organization to login to Salesforce with dedicated info for your customers (customizable based on client)

Customer Portal is an interface that is useful to provide support to your customers, help them solve issues about your products/services thereby better overall user experience.

← Back to Setup

salesforce

Help & Training

Workspaces
Anna

annalisa esposito

Choose the Experience

BROWSE BY:
All Sales Service

Build Your Own (LWR) Now
by Salesforce

Help Center
by Salesforce

Unparalleled Performance

Unparalleled Performance • Standards-Based Customization •
Develop blazing fast digital experiences, such as websites, microsites, and portals, using the Lightning...

Pay Bills Send Money

Bank Accounts
EVERYDAY CHECKING ...5809
BUSINESS CHECKING ...3870
SAVINGS (3M) INTEREST ...2421
All Bank Accounts are subject to a Savings Plan amount.

Learn

Knowledge Base

See your favorite metrics right here by getting the latest AppExchange package. [Install AppExchange Package](#)

My Workspaces

- Builder**
Build, brand, and customize your site's pages.
- Moderation**
Monitor posts and comments, create rules.
- Content Management**
Organize, manage, and build collections for your Experience Cloud site.
- Gamification**
Keep your members engaged with recognition badges.
- Dashboards**
Examine the health of your site with reports and dashboards and engage with members.
- Administration**
Configure settings and properties for your experience.

Quick Links

- [Experience Pulse Metrics](#)
- [Lightning Carousel and Banner Components](#)
- [Trailblazer Community: Experience Cloud - Best Practices Group](#)
- [Set Up and Manage Experiences Guide](#)
- [AppExchange](#)

Expand Your Reach with Communities 
[START LEARNING >](#)

 '21 Salesforce Spring '21 Release Notes
New Salesforce CMS Home Experience, drag and drop with flexible

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ACCENTURE SALESFORCE ACADEMY TECH TRAINING LAB



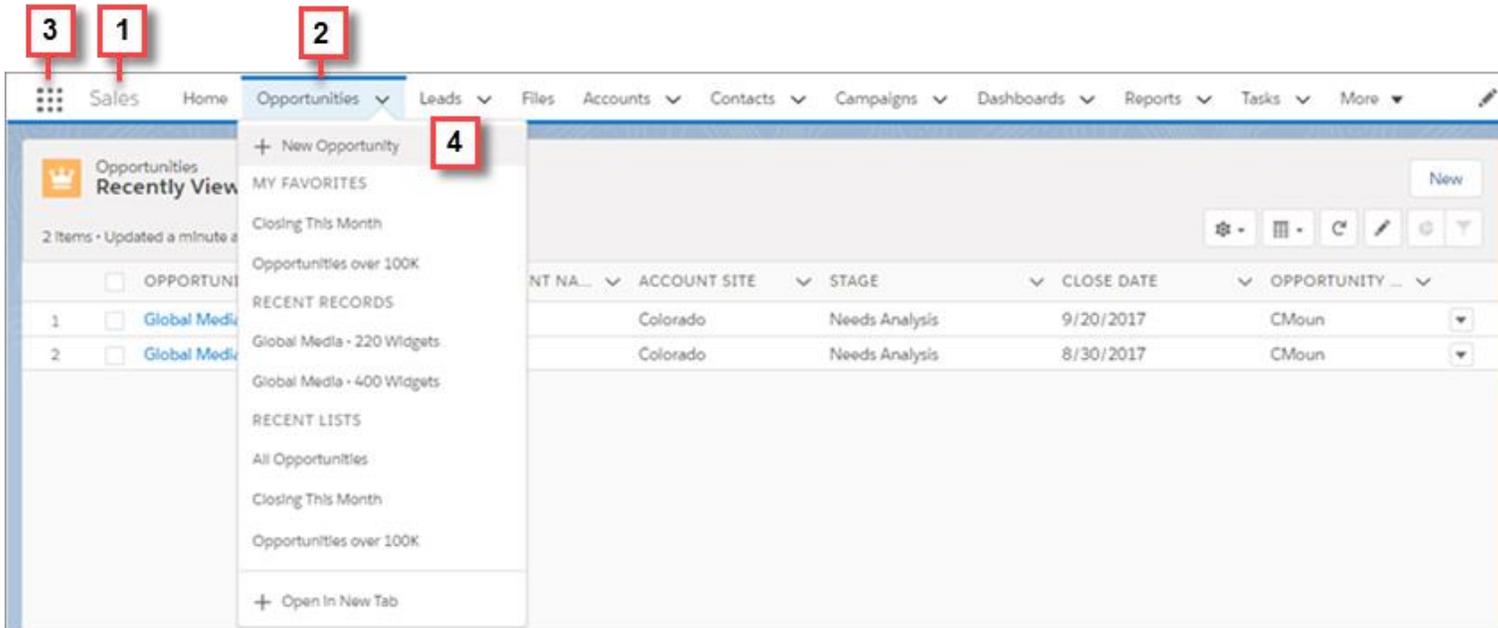
CRM FOR LIGHTNING EXPERIENCE

LIGHTNING EXPERIENCE

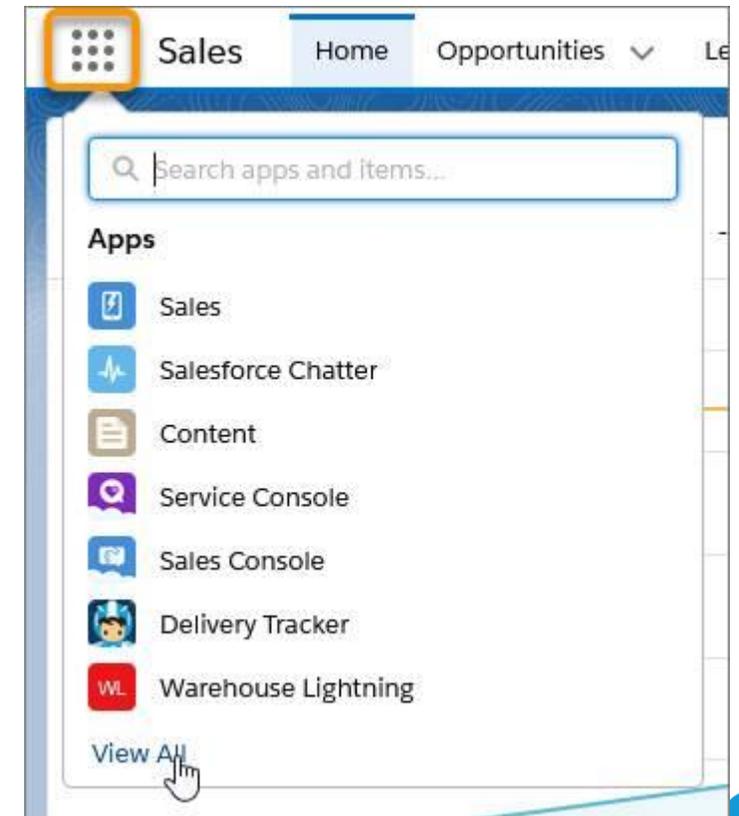


Salesforce Lightning Experience is a modern user interface that helps your sales reps sell faster and your service reps support customers more productively. Lightning Experience includes many features (e.g. Search, Home, Opportunities view) and it is designed to have a good UI both on Desktop and Mobile view.

Navigation bar is a container for a set of items and functionalities



- [1] App
- [2] Tab
- [3] App Launcher
- [4] New Record creation



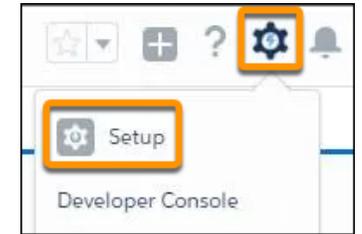
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SALES CLOUD & CUSTOMIZATION

SET UP QUICK LOOK

The **Set-up** of Salesforce can be found from the top of any page in Lightning. It is the place where is possible to customize, configure, and support the org.



From the Set-up, it is possible to access to the **Object Manager** where it is possible to manage all the Objects (standard and custom) and their fields, page layout, record type.

Create new obj

Create new field

All obj

Object detail

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Address	Address	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Article	Article	Custom Object		2/26/2021	✓

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	Name	Name		✓
Account Number	AccountNumber	Text(40)		
Account Owner	OwnerId	Lookup(User)		✓
Account Site	Site	Text(80)		
Account Source	AccountSource	Picklist		
Active	Active__c	Picklist		
Annual Revenue	AnnualRevenue	Currency(18, 0)		
Billing Address	BillingAddress	Address		
Clean Status	CleanStatus	Picklist		

Thank You

