

Introduction to Salesforce for Sales (SPSA-101)

Course Overview

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This is a 1-day class

In this course, students will learn to manage leads, accounts, contacts and opportunities. In addition the, the instructor will show students the basics of activity management and how to utilize Salesforce to effectively review and plan your day.

Who Should Attend

This course is intended for Sales people with little or no experience with Salesforce or those wanting a refresher on how to effectively manage activities within Salesforce.

Course Objectives

After completing this course the student should be able to:

- Work with Leads
- Work with Accounts
- Work with Contacts
- Work with Opportunities
- Work with Activities
- Work with Reports

Course Outline

- 1 **Introductions / Login to Training Orgs**
- 2 **Overview of Salesforce for sales**
- 3 **Working with Leads**
- 4 **Working with Accounts**
- 5 **Working with Contacts**
- 6 **Working with Opportunities**
- 7 **Working with Activities**
- 8 **Working with Reports**