
	<p>SGE</p> <p>UD 2. Práctica 2.2</p>	
<p>Tema 2. Instalación y configuración de sistemas ERP - CRM</p>		

Objetivo: Conocer los elementos básicos de SalesCloud mediante la plataforma de formación Trailhead

Una vez conocida la plataforma Trailhead, comenzamos con el análisis básico de la plataforma y sus herramientas

Paso 1 . Inicia sesión en la plataforma de formación Trailforce.


<https://trailhead.salesforce.com/es>

Registrarse

Paso 2. Primeros pasos con Sales Cloud

Iniciamos el módulo Salesforce CRM dentro de la Ruta Conceptos básicos sobre Sales Cloud

<https://trailhead.salesforce.com/es/content/learn/trails/learn-sales-cloud-fundamentals>



Ruta

Conceptos básicos sobre Sales Cloud

Explore todo Sales Cloud, desde las cuentas y los contactos hasta los candidatos y las oportunidades.

Empiece a trabajar con Salesforce y aprenda a ponerlo en marcha para su línea inferior.

+300 puntos ~1 hora 5 minutos

Módulo

Salesforce CRM

Aprenda a usar el software de gestión de las relaciones con los clientes (CRM) para expandir su negocio.

+700 puntos ~25 minutos restante • 66%

[Ocultar detalles](#)

Información general sobre Salesforce CRM ✓

~5 minutos

Navegación ✓

~20 minutos

Dosis diaria de Salesforce CRM →

~25 minutos

2.1 Realizamos test información general sobre Salesforce (incluir pantallazo)

2.2 Realizamos test navegación (incluir pantallazo)

The screenshot shows the Trailhead Salesforce learning platform. The top navigation bar includes links for Productos, Sectores, Clientes, Eventos, Recursos, Ayuda, and Empresa. The main content area displays a learning path titled 'Más información acerca de los fundamentos de CRM para Lightning Experience'. The path includes modules such as 'Información general sobre Salesforce CRM', 'Navegación', and 'Dosis diaria de Salesforce CRM'. The user's progress is shown as 53% completed, with a total of 5,900 points. The interface also shows a search bar and a 'Verifica que eres tú' button.

2.3 Realizamos ejemplos de flujos ‘Dosis de Salesforce’ (incluir pantallazos de cada ejemplo)

The screenshot shows the Salesforce Seller Home dashboard. The top navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, and More. The main content area displays two key metrics: 'Close Deals' and 'Plan My Accounts'. The 'Close Deals' section shows a total pipeline of 500 mil €, with 0 € Won and 0 € Lost. The 'Plan My Accounts' section shows 13 Accounts, with 0 Upcoming Activity, 0 Past Activity, and 13 No Activity. The dashboard also includes a search bar and a 'Good morning, Llanos. Let's get selling!' greeting.

2.3.1 Navegación a área de ventas

The screenshot shows the Salesforce Seller Home dashboard. At the top, there's a navigation bar with tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, Cases, and Forecasts. Below the navigation bar, the dashboard is divided into several sections:

- Close Deals:** A circular gauge showing 0 € Total Pipeline. It includes a legend with 0 € Open, 0 € Won, and 0 € Lost. A button "View Opportunities" is at the bottom.
- Plan My Accounts:** A circular gauge showing 13 Accounts. It includes a legend with 0 Upcoming Activity, 0 Past Activity, and 13 No Activity. A button "View Accounts" is at the bottom.
- Grow Relationships:** A circular gauge showing 21 Contacts. It includes a legend with 0 Upcoming Activity, 0 Past Activity, and 21 No Activity. A button "View Contacts" is at the bottom.
- Build Pipeline:** A circular gauge showing 22 Leads. It includes a legend with 0 Upcoming Activity, 0 Past Activity, and 22 No Activity. A button "View Leads" is at the bottom.
- My Goals:** A section for setting personal weekly or monthly goals for emails, calls, and meetings. It includes a "Set goals" button.
- Today's Events:** A section showing today's events. It includes a "View Calendar" button.
- Today's Tasks:** A section showing today's tasks. It includes a "View All" button.
- Recent Records:** A list of recent records including Mondocorp, Replacement gas generator, Shawn Corbin, and Mario Mendoza.

At the bottom, there's a "Salesclazer" section with a "To Do List" button.

2.3.2 Creación de máquina Maria's Machining

The screenshot shows the Salesforce Account page for "Maria's Machining". The page is divided into several sections:

- Account Information:** A header section showing the account name "Maria's Machining", the account owner "Mario Mendoza", and the account site "Manufacturing".
- Related:** A section showing related records. It includes a message: "We found no potential duplicates of this Account. No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records." Below this, there are sections for "Contacts (0)", "Opportunities (0)", "Cases (0)", and "Notes & Attachments (0)". Each section has a "New" button and an "Upload Files" button.
- Activity:** A section showing activity for the account. It includes a "Chatter" button and a "Filters" dropdown. Below this, there's a section for "Upcoming & Overdue" with a message: "No activities to show. Get started by sending an email, scheduling a task, and more." Below this, there's a section for "No past activity. Past meetings and tasks marked as done show up here."

2.3.3 Creación de nuevo contacto

The screenshot shows the Salesforce interface for the account 'Maria's Machining'. The 'Related' tab is active, displaying a list of related records. Under 'Contacts (1)', there is one contact: Mario Larumbe, with title, email (mario.lv@mail.com), and phone. Other sections like 'Opportunities (0)', 'Cases (0)', and 'Notes & Attachments (0)' are also visible. The right sidebar shows the 'Activity' and 'Chatter' tabs, both with no activities to show.

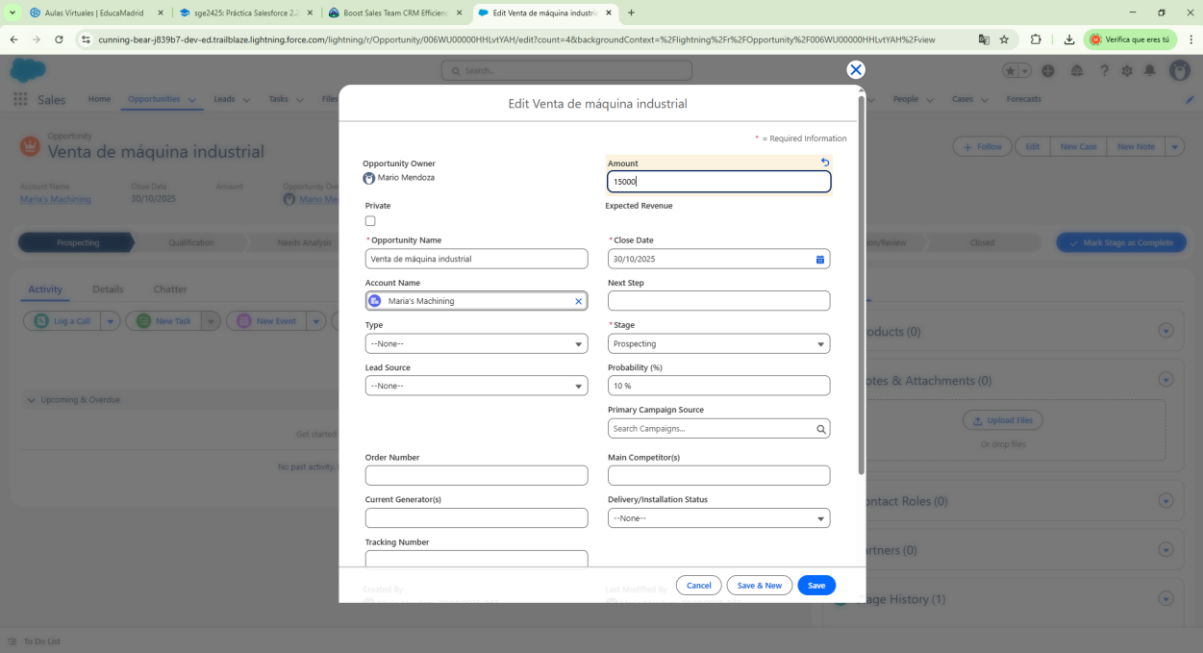
Related	Details
<p>We found no potential duplicates of this Account.</p> <p>No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.</p>	
Contacts (1)	<p>New</p> <p>Mario Larumbe</p> <p>Title: Email: mario.lv@mail.com Phone: </p> <p>View All</p>
Opportunities (0)	<p>New</p>
Cases (0)	<p>New</p>
Notes & Attachments (0)	<p>Upload Files</p> <p>Upload Files</p> <p>Or drop files</p>

2.3.4 Creación de oportunidad

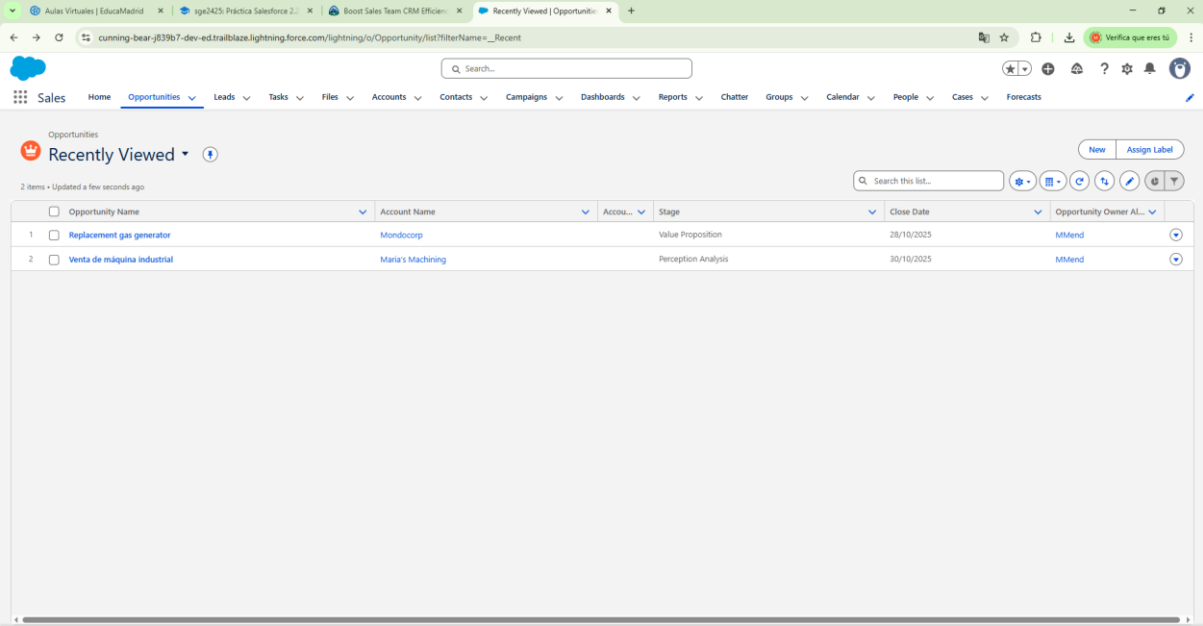
The screenshot shows the Salesforce interface for the account 'Maria's Machining'. The 'Related' tab is active, displaying a list of related records. Under 'Opportunities (1)', there is one opportunity: 'Venta de máquina industrial', with stage 'Prospecting' and close date '30/10/2025'. Other sections like 'Contacts (1)' and 'Notes & Attachments (0)' are also visible. The right sidebar shows the 'Activity' and 'Chatter' tabs, both with no activities to show.

Related	Details
<p>We found no potential duplicates of this Account.</p> <p>No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.</p>	
Contacts (1)	<p>New</p> <p>Mario Larumbe</p> <p>Title: Email: mario.lv@mail.com Phone: </p> <p>View All</p>
Opportunities (1)	<p>New</p> <p>Venta de máquina industrial</p> <p>Stage: Prospecting Amount: Close Date: 30/10/2025</p> <p>View All</p>

2.3.5 Modificación de cantidad de oportunidad



2.3.6 Visualice datos



2.3.7 Visualizar modo kanvan

Opportunities

Recently Viewed

2 items • Sorted by Amount • Refresh this list to view the latest data

0 €

15.000 €

Replacement gas gener...

Mondocorp

Value Proposition

Venta de máquina indu...

Maria's Machining

Perception Analysis

12

To Do List

2.3.8 Crear informe para oportunidades

Reports

New Opportunities Report

Opportunities

Previewing a limited number of records. Run the report to see everything.

	Owner Role	Account Name	Opportunity Name	Stage	Opportunity Owner	Fiscal Period	Amount	Expected Revenue	Probability (%)	Age	Close Date	Created Date	Next Step	Lead Source
1	-	Mondocorp	Replacemient gas generator	Value Proposition	Mario Mendoza	Q4-2025	-	-	50 %	0	28/10/2025	28/10/2025	-	-
2	-	Maria's Machining	Venta de máquina industrial	Perception Analysis	Mario Mendoza	Q4-2025	15.000,00 €	10.500,00 €	70 %	0	30/10/2025	28/10/2025	-	-
3							Avg: 7.500,00 € Max: 15.000,00 € Min: 0,00 €							

Columns

Owner Role

Account Name

Opportunity Name

Stage

Opportunity Owner

Fiscal Period

Amount

Expected Revenue

Probability (%)

Age

Close Date

Created Date

Next Step

Lead Source

Type

12

To Do List

2.3.9 Agregar una cuenta y un contacto, y luego crear una oportunidad Mondocorp

Paso 3 : Más información acerca de los fundamentos de CRM para Lightning Experience

Añade los pantallazos correspondientes a cada paso

<https://trailhead.salesforce.com/es-MX/content/learn/trails/crm-essentials-lightning-experience>

3.1 Cuentas y contactos

Almacenar información sobre los clientes
~20 minutos
Comprender las relaciones de cuentas y contactos
~10 minutos

3.1.1 Almacenar información sobre los clientes

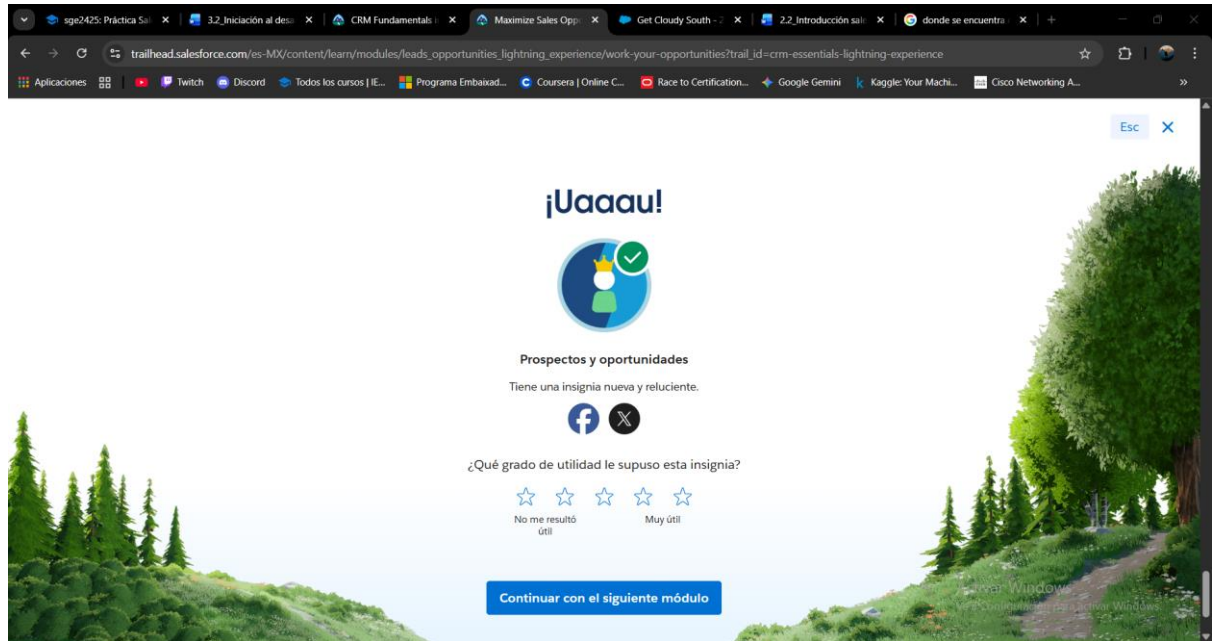
3.1.2 Comprender las relaciones entre cuentas y contactos

The screenshot shows the Trailhead interface for the 'CRM Fundamentals in Lightning Experience' learning path. On the left, a card titled 'Más información acerca de los fundamentos de CRM para Lightning Experience' provides an overview of the path's goals and includes buttons for 'Continuar', 'Retirar de favoritos', and 'Agregar a Trailmix'. Below this card, a list of skills to be gained is shown, including 'Mejora y optimización de procesos', 'Gestión de ventas', 'Diseño e implementación de sistemas', 'Inteligencia artificial generativa', and 'Gestión de cuentas y estrategia'. On the right, a list of units is displayed, each with a duration, a green checkmark indicating completion, and a 'Verificar que eres tú' button. The units are: 'Dosis diaria de Salesforce CRM' (~25 minutos), 'Almacenar información sobre los clientes' (~20 minutos), and 'Comprender las relaciones de cuentas y contactos' (~10 minutos). Below these, a module titled 'Cuentas y contactos' is shown, which includes the first two units and has a progress bar at 75%.

3.2 Prospectos y oportunidades. Solo primer punto

Crear prospectos y convertirlos en clientes potenciales
~25 minutos

3.2.1 Crear prospectos y convertirlos en clientes potenciales



3.3 Reportes y tableros para Lightning Experience

[Más información sobre informes y tableros de Lightning](#)

~10 minutos

[Crear informes con el Generador de informes](#)

~25 minutos

[Filtrar el informe](#)

~25 minutos

[Dar formato al informe](#)

~25 minutos

[Visualizar sus datos con el generador de tableros de Lightning](#)

~25 minutos

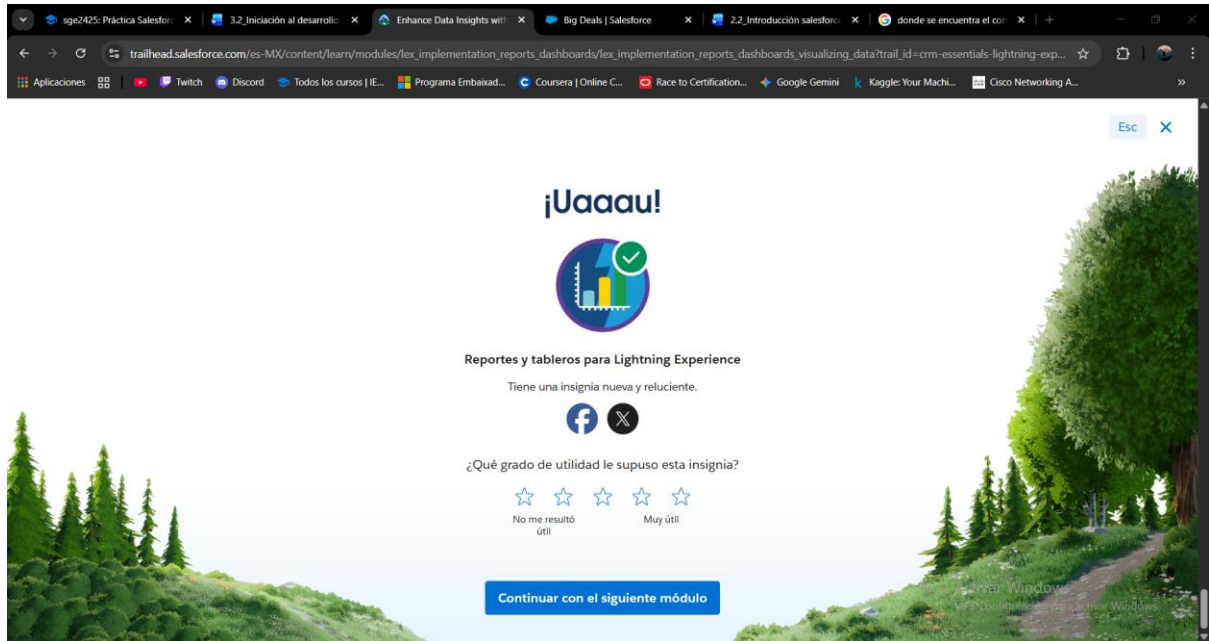
3.3.1 Más información sobre informes y tableros de Lightning

3.3.2 Crear informes con el Generador de informes

3.3.3 Filtrar el informe

3.3.4 Dar formato al informe

3.3.5 Visualizar sus datos con el generador de tableros de Lightning



3.4. Administración de Chatter para Lightning Experience

Empezar a trabajar con Chatter
~5 minutos
Trabajar con grupos de Chatter
~10 minutos
Activar el seguimiento de noticias en tiempo real
~15 minutos
Aprobar registros desde noticias en tiempo real de Chatter
~25 minutos
Desarrollar una estrategia de instalación
~10 minutos

3.4.1 Empezar a trabajar con Chatter

3.4.2 Trabajar con grupos de Chatter

3.4.3 Activar el seguimiento de noticias en tiempo real

3.4.4 Aprobar registros desde noticias en tiempo real de Chatter

3.4.5 Desarrollar una estrategia de instalación

