

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>

The screenshot shows the Trailhead interface for the 'Conceptos básicos sobre Sales Cloud' module. At the top, there's a banner with a mountain icon and the text 'Ruta'. Below it, the title 'Conceptos básicos sobre Sales Cloud' is displayed, along with a brief description: 'Explore todo Sales Cloud, desde las cuentas y los contactos hasta los candidatos y las oportunidades.' To the right, there's a summary section with the following details:

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% <div style="width: 66%;"></div>

Below this summary, there are three listed items with checkmarks:

- Información general sobre Salesforce CRM** (~5 minutos) - checked
- Navegación** (~20 minutos) - checked
- Dosis diaria de Salesforce CRM** (~25 minutos) - not checked

2.1 Realizamos test información general sobre Salesforce (incluir pantallazo)

2.2 Realizamos test navegación (incluir pantallazo)

The screenshot shows the Trailhead platform interface. At the top, there's a navigation bar with links like 'Productos', 'Sectores', 'Clientes', etc. Below it, a sub-navigation bar includes 'Trailhead', 'Hoy', 'Aprender', 'Comunidad', 'Desarrollo profesional', 'Certificaciones', and 'Ayuda'. A search bar says 'Buscar en Trailhead'.

The main content area displays a 'Máis información acerca de los fundamentos de CRM para Lightning Experience' section with a 'Continuar →' button. To the right, a 'Salesforce CRM' module card is shown, indicating '+700 PUNTOS' and completion on 'oct 28, 2025'. It lists three completed lessons: 'Información general sobre Salesforce CRM' (5 minutes), 'Navegación' (20 minutes), and 'Dosis diaria de Salesforce CRM' (25 minutes). Below this is another module card for 'Cuentas y contactos' with '+600 PUNTOS' and a 50% progress bar.

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

The screenshot shows the Salesforce Seller Home dashboard. At the top, there's a navigation bar with tabs like 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', and 'More'. A search bar is also present.

The main area features two circular summary cards. The left card, titled 'Close Deals', shows '500 mil € Total Pipeline' with three status categories: '500 mil € Open' (green), '0 € Won' (blue), and '0 € Lost' (red). The right card, titled 'Plan My Accounts', shows '13 Accounts' with three activity levels: '0 Upcoming Activity' (green), '0 Past Activity' (blue), and '13 No Activity' (red).

2.3.1 Navegación a área de ventas

The screenshot shows the Salesforce Sales Home page. At the top, there are four main sections: 'Close Deals' (0 € Total Pipeline), 'Plan My Accounts' (13 Accounts), 'Grow Relationships' (21 Contacts), and 'Build Pipeline' (22 Leads). Below these are two more sections: 'My Goals' (with a 'Set goals' button) and 'Today's Events' (which says 'Looks like you're free and clear the rest of the day'). To the right is a 'Recent Records' sidebar listing accounts: Mondcorp, Replacement gas generator, Shawn Corbin, and Mario Mendoza. At the bottom left is a 'Salesblazer' section with a 'To Do List' link.

2.3.2 Creación de máquina Maria's Machining

The screenshot shows the Salesforce Account page for 'Maria's Machining'. The top navigation bar has 'Accounts' selected. The account details include Type: Prospect, Phone, Website, Account Owner: Mario Mendoza, Account Site, and Industry: Manufacturing. On the left, there are tabs for 'Related' (Contacts: 0, Opportunities: 0, Cases: 0, Notes & Attachments: 0) and 'Details'. On the right, there are sections for 'Activity' (with a button to '+ Follow') and 'Chatter' (with a button to 'Edit'). A message at the top right says 'No activities to show.' and 'Get started by sending an email, scheduling a task, and more.'

2.3.3 Creación de nuevo contacto

The screenshot shows the Salesforce Lightning interface for creating a new contact. The top navigation bar includes Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, Cases, and Forecasts. The current page is 'Accounts'. A banner at the top right says 'Verifica que eres tú'.

The main content area is titled 'Account' and shows 'Maria's Machining'. It has tabs for 'Related' and 'Details'. Under 'Related', there is a message: 'We found no potential duplicates of this Account.' Below this are sections for 'Contacts (1)', 'Opportunities (0)', 'Cases (0)', and 'Notes & Attachments (0)'. The 'Contacts' section lists one contact: 'Mario Larunve' (Title: mario.lv@mail.com). There is a 'New' button next to each section. On the right side, there is an 'Activity' tab with a list of icons for different types of activities like emails, calls, and tasks. Below it is a 'Chatter' section with a message: 'No activities to show. Get started by sending an email, scheduling a task, and more.' and 'No past activity. Past meetings and tasks marked as done show up here.'

2.3.4 Creación de oportunidad

The screenshot shows the Salesforce Lightning interface for creating a new opportunity. The top navigation bar and account information ('Maria's Machining') are identical to the previous screenshot. The 'Opportunities' tab is selected in the top navigation bar.

The main content area shows the opportunity details for 'Venta de máquina industrial'. The opportunity is in the 'Prospecting' stage, with an amount of '\$' and a close date of '30/10/2023'. There is a 'New' button next to the opportunity summary. The rest of the interface is similar to the contact creation screen, including the 'Related' and 'Details' tabs, the 'Activity' and 'Chatter' sections, and the 'To Do List' at the bottom.

2.3.5 Modificación de cantidad de oportunidad

The screenshot shows the Salesforce Lightning interface for editing an opportunity. The main title is 'Edit Venta de máquina industrial'. Key fields visible include:

- Opportunity Owner: Mario Mendoza
- Amount: 15000
- Opportunity Name: Venta de máquina industrial
- Close Date: 30/10/2025
- Type: Prospecting
- Lead Source: --None--
- Order Number: (empty)
- Current Generator(s): (empty)
- Tracking Number: (empty)
- Main Competitor(s): (empty)
- Delivery/Installation Status: --None--

2.3.6 Visualice datos

The screenshot shows the Salesforce Lightning interface for viewing recently viewed opportunities. The list includes:

Opportunity Name	Account Name	Stage	Close Date	Opportunity Owner AL...
Replacement gas generator	Mondocorp	Value Proposition	28/10/2025	MMend
Venta de máquina industrial	Maria's Machining	Perception Analysis	30/10/2025	MMend

2.3.7 Visualizar modo kanban

The screenshot shows the Opportunities Kanban board in Salesforce. The board has nine columns: Prospecting (0), Qualification (0), Needs Analysis (0), Value Proposition (1), id. Decision Makers (0), Description Analysis (1), Proposal/Price Quote (0), Negotiation/Review (0), and Closed Won (0). There are two opportunities visible:

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

2.3.8 Crear informe para oportunidades

The screenshot shows the Report Builder interface in Salesforce. A report titled "New Opportunities Report" is being created. The report includes the following fields:

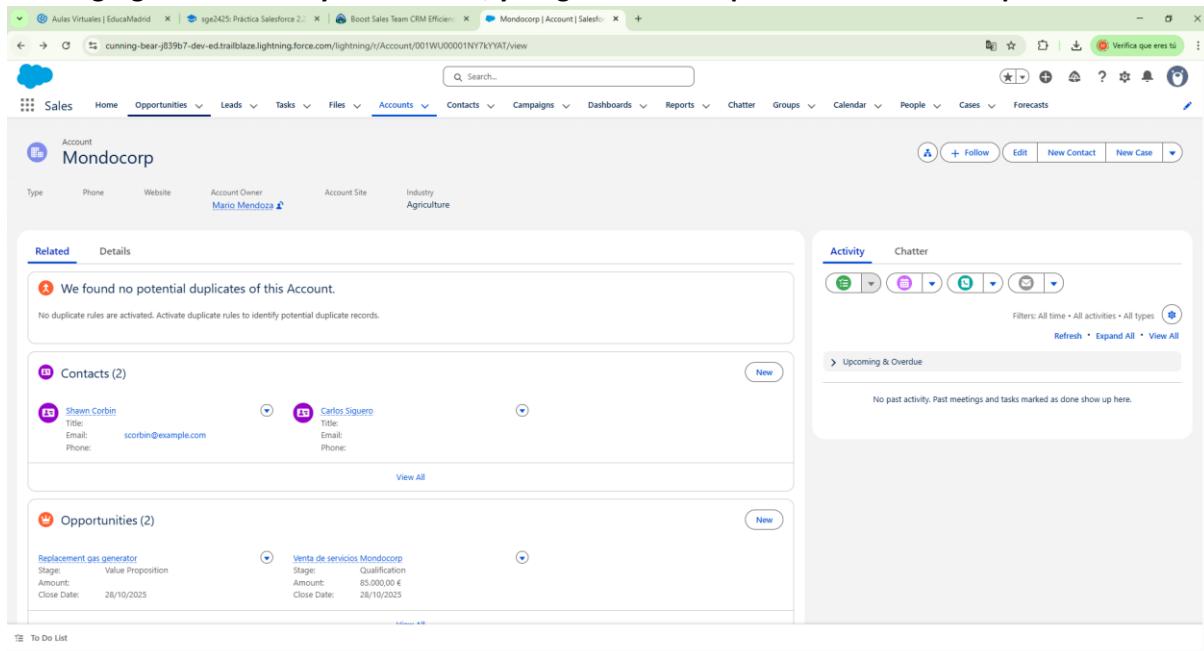
- Owner Role
- Account Name
- Opportunity Name
- Stage
- Opportunity Owner
- Fiscal Period
- Amount
- Expected Revenue
- Probability (%)
- Age
- Close Date
- Created Date
- Next Step
- Lead Source
- Type

The report preview shows two opportunities:

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
Mondocorp	Replacement gas generator	Value Proposition	Pending Review	Mario Mendoza	Q4-2025	-	-	50 %	0	28/10/2025	28/10/2025	-	-	-
Maria's Machining	Venta de máquina industrial	Perception Analysis	Pending Review	Mario Mendoza	Q4-2025	15.000,00 €	10.500,00 €	70 %	0	30/10/2025	28/10/2025	-	-	-

Report Statistics:
Avg: 7.500,00 €
Max: 15.000,00 €
Min: 0,00 €

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



The screenshot shows the Salesforce Lightning Experience interface. The main view is the Account page for 'Mondocorp'. Key details include:

- Type: Account
- Phone: (not visible)
- Website: (not visible)
- Account Owner: Mario Mendoza
- Account Site: (not visible)
- Industry: Agriculture

Related sections show:

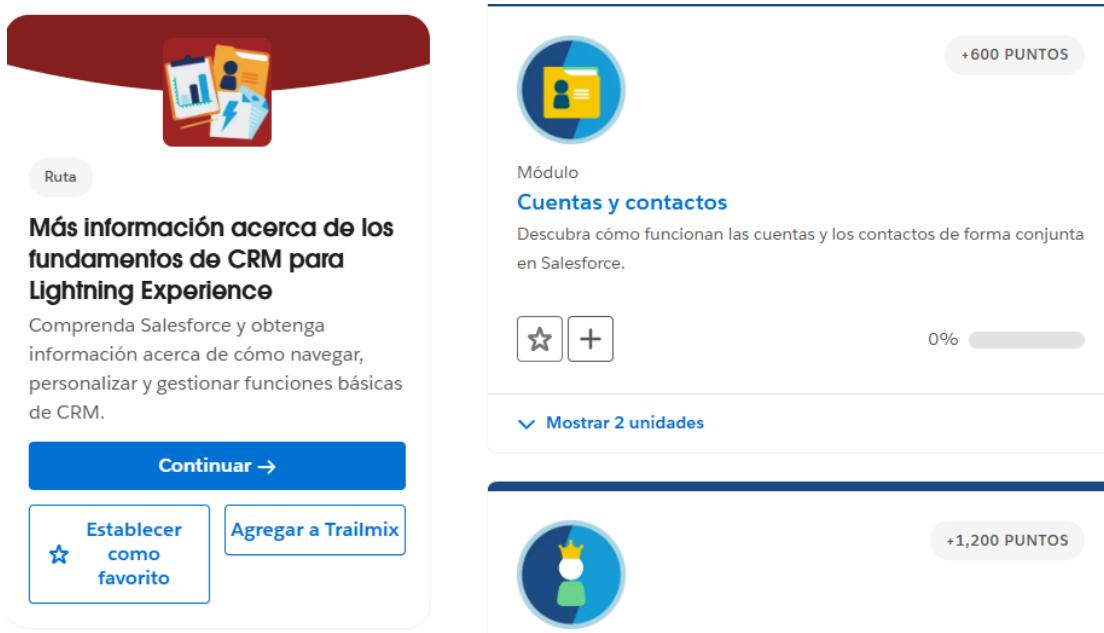
- Contacts (2):** Shawn Corbin (Title: Director, Email: scorbin@example.com) and Carlos Siguero (Title: Sales Rep, Email: csiguero@example.com).
- Opportunities (2):**
 - Replacement gas generator: Stage: Value Proposition, Amount: \$10,000.00, Close Date: 28/10/2025.
 - Venta de servicios Mondocorp: Stage: Qualification, Amount: \$50,000.00, Close Date: 28/10/2025.

A sidebar on the right displays the Activity and Chatter feeds. The Activity feed shows no past activity. The Chatter feed has a message from 'Verifica que eres tú'.

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>



The image contains two Trailhead module cards:

Módulo Cuentas y contactos

+600 PUNTOS

Más información acerca de los fundamentos de CRM para Lightning Experience

Comprenda Salesforce y obtenga información acerca de cómo navegar, personalizar y gestionar funciones básicas de CRM.

Continuar →

Establecer como favorito **Agregar a Trailmix**

Más información acerca de los fundamentos de CRM para Lightning Experience

Descubra cómo funcionan las cuentas y los contactos de forma conjunta en Salesforce.

Mostrar 2 unidades

+1,200 PUNTOS

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

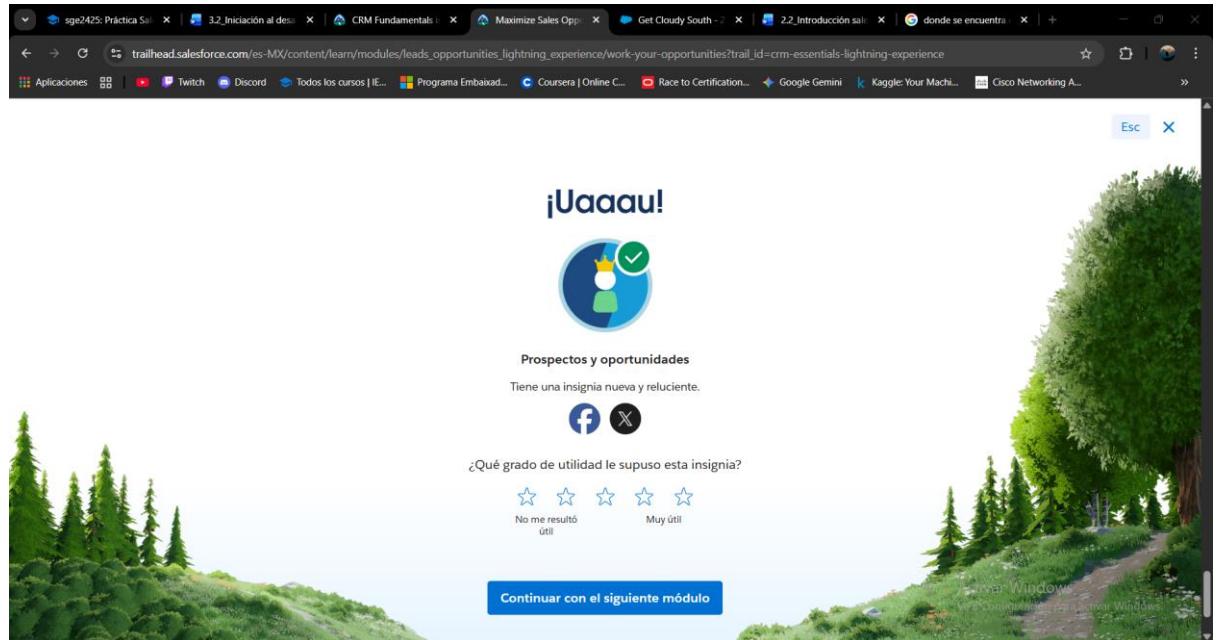
The screenshot shows the Trailhead Salesforce CRM Fundamentals in Lightning Experience course page. At the top, there's a navigation bar with links like 'Hoy', 'Aprender', 'Comunidad', 'Desarrollo profesional', 'Certificaciones', and 'Ayuda'. Below the navigation, there's a section titled 'Más información acerca de los fundamentos de CRM para Lightning Experience' with a 'Continuar →' button. To the right, there are two main modules: 'Cuentas y contactos' (with 600 PUNTOS) and 'Candidatos y oportunidades' (with 1.200 PUNTOS). Each module has a progress bar indicating completion status.

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

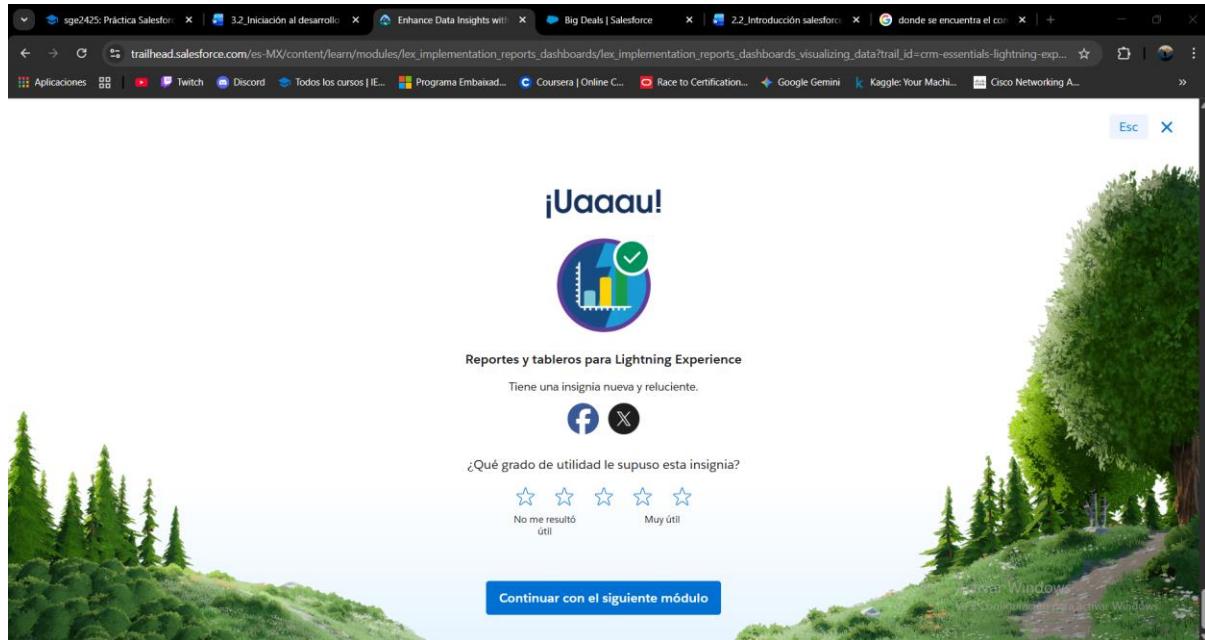
3.3.1 Más información sobre informes y tableros de Lightning

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

