

Postgraduate Certificate Salesforce Reporting and Dashboards





Postgraduate Certificate Salesforce Reporting and Dashboards

- » Modality: online
- » Duration: 6 weeks
- » Certificate: TECH Global University
- » Accreditation: 6 ECTS
- » Schedule: at your own pace
- » Exams: online

Website: www.techtute.com/us/school-of-business/postgraduate-certificate/salesforce-reporting-dashboards

Index

01

Introduction to the Program

p. 4

02

Why Study at TECH?

p. 8

03

Syllabus

p. 12

04

Teaching Objectives

p. 16

05

Study Methodology

p. 20

06

Teaching Staff

p. 30

07

Certificate

p. 34

01

Introduction to the Program

Salesforce, as one of the most widely used customer relationship management (CRM) platforms globally, offers advanced reporting and dashboard tools that enable real-time visualization and analysis of key metrics. According to a Gartner report, more than 60% of companies worldwide have adopted CRM-integrated business intelligence solutions to optimize their performance and improve the customer experience. As this is currently a highly relevant field, TECH has designed this Postgraduate Certificate to provide the knowledge needed to design personalized reports and dynamic panels that optimize business performance. All this, based on a 100% online, dynamic and innovative methodology.



“

A 100% online Postgraduate Certificate that will help you optimize processes, improve productivity and add strategic value to any organization. Enroll today and take your professional profile to the next level!”

Reporting and Dashboards in Salesforce are fundamental for data-based decision-making within an organization. In fact, they allow users to analyze information in real time, visualize key metrics and improve operational efficiency. All of this helps companies make more informed and strategic decisions.

With the aim of optimizing team performance and improving operational efficiency, TECH has designed this comprehensive Postgraduate Certificate in Salesforce Reporting and Dashboards. This academic program is distinguished by its practical and up-to-date approach, addressing essential topics such as creating reports in Salesforce, applying advanced filters, segmenting information, and designing interactive dashboards. Likewise, it will provide knowledge about the automation of analysis, integration with external sources and the use of predictive tools to facilitate data-based decision making. In this way, professionals will develop specialized skills in the generation of personalized reports and the configuration of dynamic panels in real time.

Based on this, graduates will be ready to access new opportunities in areas such as data analytics, commercial management and CRM consulting, playing key roles in the digital transformation of organizations. Therefore, those who complete this program will be prepared to face the challenges of the modern corporate environment, promoting strategies based on information and improving operational efficiency in their respective companies.

In addition, this program will be delivered 100% online, allowing students to balance their learning with their professional and personal responsibilities. At the same time, the implementation of the Relearning method will guarantee a progressive assimilation of the concepts, facilitating a dynamic and effective learning based on the reiteration of key contents. In short, TECH will provide a flexible and accessible environment, with materials available 24 hours a day.

This **Postgraduate Certificate in Salesforce Reporting and Dashboards** contains the most complete and up-to-date university program on the market. Its most notable features are:

- ♦ The development of case studies presented by experts in Salesforce
- ♦ The graphic, schematic, and practical contents with which they are created, provide scientific and practical information on the disciplines that are essential for professional practice
- ♦ Practical exercises where self-assessment can be used to improve learning
- ♦ Special emphasis on innovative methodologies in the management of audiovisual industries
- ♦ Theoretical lessons, questions to the expert, debate forums on controversial topics, and individual reflection assignments
- ♦ Content that is accessible from any fixed or portable device with an Internet connection



With Relearning, you will develop practical skills in Salesforce Reporting and Dashboards in a flexible and effective way. You will turn data into your best ally and excel in the digital world!"



Master the creation of advanced reports and interactive dashboards with this innovative TECH program. You will have access to 100% online education and take your career to the next level!"

Its teaching staff includes professionals from the Salesforce field, who bring their work experience to this program, as well as renowned specialists from leading companies and prestigious universities.

The multimedia content, developed with the latest educational technology, will provide the professional with situated and contextual learning, i.e., a simulated environment that will provide an immersive learning experience designed to prepare for real-life situations.

This program is designed around Problem-Based Learning, whereby the student must try to solve the different professional practice situations that arise throughout the program. For this purpose, the professional will be assisted by an innovative interactive video system created by renowned and experienced experts.

With an up-to-date syllabus and a flexible methodology, this program will prepare you to optimize data management in any company. What are you waiting for to enroll and excel in the world of CRM?

*Make data work for you with Salesforce!
With this Postgraduate Certificate, designed by industry experts, you will learn how to design dynamic dashboards and advanced reports. Enroll now!*



02

Why Study at TECH?

TECH is the world's largest online university. With an impressive catalog of more than 14,000 university programs, available in 11 languages, it is positioned as a leader in employability, with a 99% job placement rate. In addition, it has a huge faculty of more than 6,000 professors of the highest international prestige.



“

Study at the largest online university in the world and ensure your professional success. The future begins at TECH”

The world's best online university, according to FORBES

The prestigious Forbes magazine, specialized in business and finance, has highlighted TECH as "the best online university in the world" This is what they have recently stated in an article in their digital edition in which they echo the success story of this institution, "thanks to the academic offer it provides, the selection of its teaching staff, and an innovative learning method oriented to form the professionals of the future".

Forbes

The best online university in the world

The most complete **syllabus**

The most complete syllabuses on the university scene

TECH offers the most complete syllabuses on the university scene, with programs that cover fundamental concepts and, at the same time, the main scientific advances in their specific scientific areas. In addition, these programs are continuously updated to guarantee students the academic vanguard and the most demanded professional skills and the most in-demand professional competencies. In this way, the university's qualifications provide its graduates with a significant advantage to propel their careers to success.

The best top international faculty

TECH's faculty is made up of more than 6,000 professors of the highest international prestige. Professors, researchers and top executives of multinational companies, including Isaiah Covington, performance coach of the Boston Celtics; Magda Romanska, principal investigator at Harvard MetaLAB; Ignacio Wistumba, chairman of the department of translational molecular pathology at MD Anderson Cancer Center; and D.W. Pine, creative director of TIME magazine, among others.

TOP
international faculty



The most effective methodology

A unique learning method

TECH is the first university to use Relearning in all its programs. This is the best online learning methodology, accredited with international teaching quality certifications, provided by prestigious educational agencies. In addition, this innovative academic model is complemented by the "Case Method", thereby configuring a unique online teaching strategy. Innovative teaching resources are also implemented, including detailed videos, infographics and interactive summaries.

The world's largest online university

TECH is the world's largest online university. We are the largest educational institution, with the best and widest digital educational catalog, one hundred percent online and covering most areas of knowledge. We offer the largest selection of our own degrees and accredited online undergraduate and postgraduate degrees. In total, more than 14,000 university programs, in ten different languages, making us the largest educational institution in the world.

World's No.1
The World's largest online university

The official online university of the NBA

TECH is the official online university of the NBA. Thanks to our agreement with the biggest league in basketball, we offer our students exclusive university programs, as well as a wide variety of educational resources focused on the business of the league and other areas of the sports industry. Each program is made up of a uniquely designed syllabus and features exceptional guest hosts: professionals with a distinguished sports background who will offer their expertise on the most relevant topics.

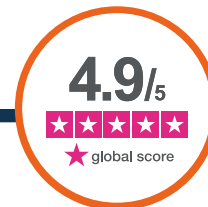
Leaders in employability

TECH has become the leading university in employability. Ninety-nine percent of its students obtain jobs in the academic field they have studied within one year of completing any of the university's programs. A similar number achieve immediate career enhancement. All this thanks to a study methodology that bases its effectiveness on the acquisition of practical skills, which are absolutely necessary for professional development.



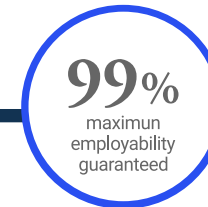
Google Premier Partner

The American technology giant has awarded TECH the Google Premier Partner badge. This award, which is only available to 3% of the world's companies, highlights the efficient, flexible and tailored experience that this university provides to students. The recognition not only accredits the maximum rigor, performance and investment in TECH's digital infrastructures, but also places this university as one of the world's leading technology companies.



The top-rated university by its students

Students have positioned TECH as the world's top-rated university on the main review websites, with a highest rating of 4.9 out of 5, obtained from more than 1,000 reviews. These results consolidate TECH as the benchmark university institution at an international level, reflecting the excellence and positive impact of its educational model.



03 Syllabus

This qualification offers a complete tour of the essential tools for data analysis and visualization, addressing topics such as the generation and customization of reports in Lightning, the advanced configuration of dynamic dashboards and integration with other data sources. Likewise, professionals will delve into the automation of analysis through filters and personalized formulas, as well as the interpretation of key performance indicators (KPIs) for strategic decision-making. In this way, they will develop key skills to optimize data management in business environments, boosting operational efficiency and maximizing the profitability of organizations.



“

Do you aspire to get highly valued positions in Salesforce Reporting and Dashboards? TECH will help you achieve your goals through this 100% online program"

Module 1. Salesforce Security

- 1.1. Security in Apex
 - 1.1.1. Best Practices for Secure and Attack Protected Code
 - 1.1.2. Data Encryption in Transit and at Rest
- 1.2. Security in Visualforce
 - 1.2.1. Security in Visualforce
 - 1.2.2. Security in Visualforce Framework
 - 1.2.3. Best Practices for Secure Code in Visualforce
- 1.3. Security in Aura
 - 1.3.1. Security in Aura Framework
 - 1.3.2. Practical Examples of Protection and Security Evidences in Aura
 - 1.3.3. Best Practices for Secure Code in Aura
- 1.4. Security in Lightning Web Components
 - 1.4.1. Security in LWC Framework
 - 1.4.2. Practical Examples of Protection and Security Evidences in LWC
 - 1.4.3. Best Practices for Secure Code in LWC
- 1.5. *User Access Management*
 - 1.5.1. User Profiling and Licensing (Profiles & Custom Permission)
 - 1.5.2. Role Hierarchy and Territory Model
 - 1.5.3. Team Management (Case, Account and Opportunity)
 - 1.5.4. Queues and User Groups
 - 1.5.5. Best Practices for External User Access
- 1.6. Security at the Registry Level
 - 1.6.1. OWD, Sharing Rules, ARSDR and Manual Sharing. Best Practices
 - 1.6.2. Blocking of Registries
 - 1.6.3. Implicit Sharing and Apex Sharing Reasons
 - 1.6.4. *Data Masking*
- 1.7. Security at the Field Level
 - 1.7.1. Advanced Profiling Modeling
 - 1.7.2. Best Practices for Dynamic Forms
 - 1.7.3. FLS Control and Record Visibility in Apex and SOQL





- 1.8. User Authentication and Salesforce Access Authorization
 - 1.8.1. Authentication Methods (U/P, SSO and Delegated Authentication)
 - 1.8.2. Login Flows Best Practices
 - 1.8.3. Best Practices for Internal and External Access (Experience Cloud)
 - 1.8.4. Setting Up Secure Access for External Applications to Salesforce
 - 1.8.5. Best Practices in OAuth Flows for Access Authorization
- 1.9. Monitoring and Security Policies
 - 1.9.1. Salesforce Shield. Advanced Use Cases
 - 1.9.2. Salesforce Shield. *Field Audit Trail*
 - 1.9.3. Salesforce Shield. *Transaction Security Policies*
- 1.10. Security at the Network Level
 - 1.10.1. HTTPS & TLS - Advanced Configuration in Salesforce
 - 1.10.2. 1-Way & 2-Way SSL Flow. Configuration and Applicability
 - 1.10.3. Best Practices in Network Configuration

“Enroll in this program and benefit from the best teaching tools that TECH offers you. You will boost your career growth and master Salesforce Reporting and Dashboards!”

04

Teaching Objectives

This Postgraduate Certificate will provide professionals with the skills necessary to manage and analyze information effectively within the most widely used CRM platform worldwide. Throughout the program, they will acquire the necessary tools to create advanced reports and dynamic dashboards that facilitate the visualization and understanding of key information for strategic decision making. In this way, graduates will have a comprehensive preparation that will allow them to excel in the field of data analysis and business management with Salesforce.





“

Thanks to this comprehensive qualification, you will make informed decisions based on accurate data, elevating your professional profile in a highly competitive environment”



General Objectives

- Design interactive dashboards in Salesforce for strategic decision making
- Configure personalized reports to analyze business performance
- Optimize data visualization using advanced Salesforce tools
- Implement key metrics to evaluate the performance of teams and processes
- Automate the generation and distribution of reports in Salesforce
- Integrate data from multiple sources to obtain a unified business vision
- Improve data interpretation with dynamic graphics and personalized filters
- Apply segmentation techniques to perform detailed customer and sales analysis
- Ensure security and controlled access to reports within Salesforce
- Boost business productivity by creating efficient reports





Specific Objectives

- Implement and manage security controls in Salesforce to protect sensitive company data
- Manage user authentication and platform security settings



You will have access to high-quality content, real-life case studies and specialized lessons from anywhere in the world. Start your education with the best today!"

05

Study Methodology

TECH is the world's first university to combine the **case study** methodology with **Relearning**, a 100% online learning system based on guided repetition.

This disruptive pedagogical strategy has been conceived to offer professionals the opportunity to update their knowledge and develop their skills in an intensive and rigorous way. A learning model that places students at the center of the educational process giving them the leading role, adapting to their needs and leaving aside more conventional methodologies.



“

TECH will prepare you to face new challenges in uncertain environments and achieve success in your career”

The student: the priority of all TECH programs

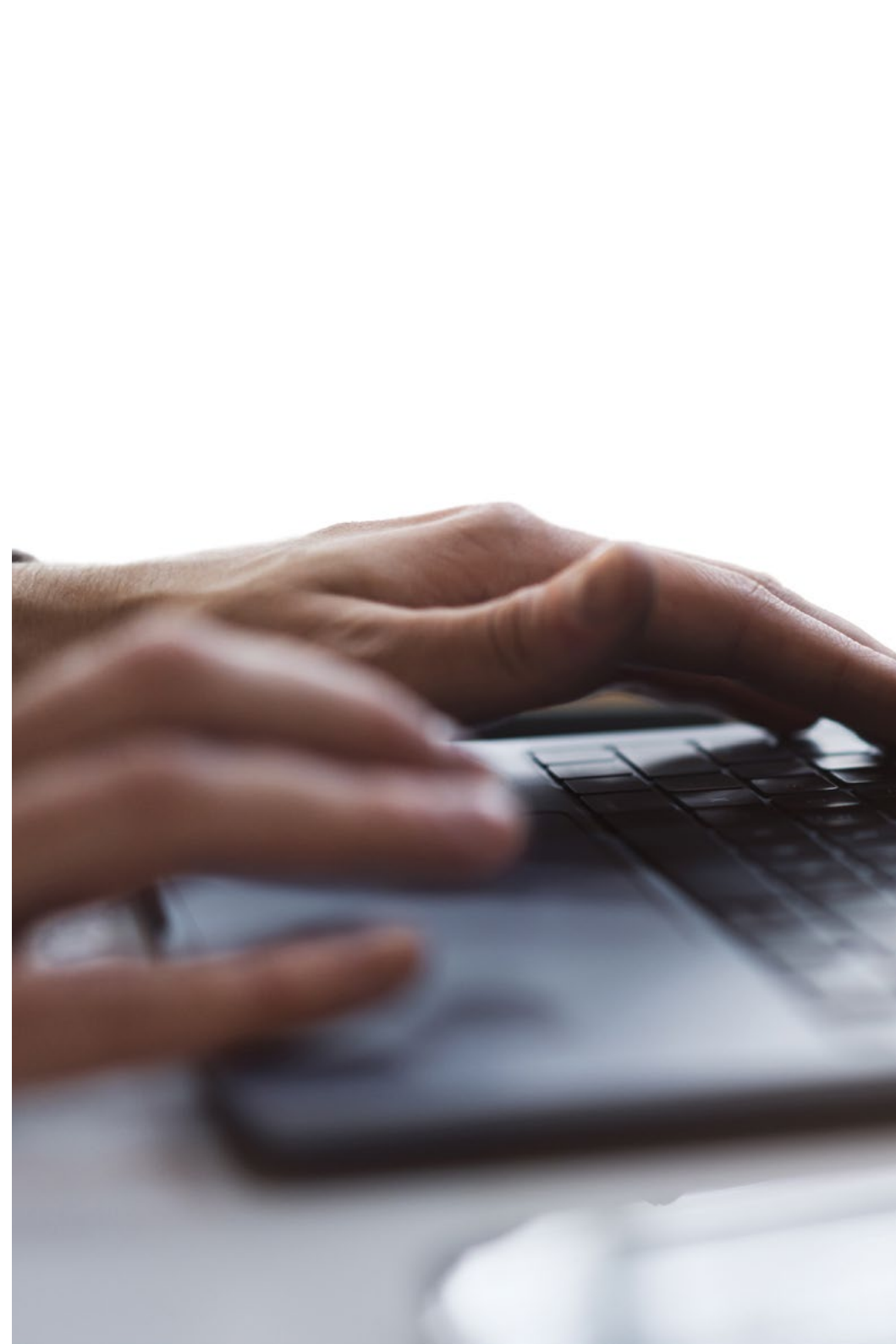
In TECH's study methodology, the student is the main protagonist.

The teaching tools of each program have been selected taking into account the demands of time, availability and academic rigor that, today, not only students demand but also the most competitive positions in the market.

With TECH's asynchronous educational model, it is students who choose the time they dedicate to study, how they decide to establish their routines, and all this from the comfort of the electronic device of their choice. The student will not have to participate in live classes, which in many cases they will not be able to attend. The learning activities will be done when it is convenient for them. They can always decide when and from where they want to study.

“

*At TECH you will NOT have live classes
(which you might not be able to attend)”*



The most comprehensive study plans at the international level

TECH is distinguished by offering the most complete academic itineraries on the university scene. This comprehensiveness is achieved through the creation of syllabi that not only cover the essential knowledge, but also the most recent innovations in each area.

By being constantly up to date, these programs allow students to keep up with market changes and acquire the skills most valued by employers. In this way, those who complete their studies at TECH receive a comprehensive education that provides them with a notable competitive advantage to further their careers.

And what's more, they will be able to do so from any device, pc, tablet or smartphone.

“*TECH's model is asynchronous, so it allows you to study with your pc, tablet or your smartphone wherever you want, whenever you want and for as long as you want*”

Case Studies and Case Method

The case method has been the learning system most used by the world's best business schools. Developed in 1912 so that law students would not only learn the law based on theoretical content, its function was also to present them with real complex situations. In this way, they could make informed decisions and value judgments about how to resolve them. In 1924, Harvard adopted it as a standard teaching method.

With this teaching model, it is students themselves who build their professional competence through strategies such as Learning by Doing or Design Thinking, used by other renowned institutions such as Yale or Stanford.

This action-oriented method will be applied throughout the entire academic itinerary that the student undertakes with TECH. Students will be confronted with multiple real-life situations and will have to integrate knowledge, research, discuss and defend their ideas and decisions. All this with the premise of answering the question of how they would act when facing specific events of complexity in their daily work.



Relearning Methodology

At TECH, case studies are enhanced with the best 100% online teaching method: Relearning.

This method breaks with traditional teaching techniques to put the student at the center of the equation, providing the best content in different formats. In this way, it manages to review and reiterate the key concepts of each subject and learn to apply them in a real context.

In the same line, and according to multiple scientific researches, reiteration is the best way to learn. For this reason, TECH offers between 8 and 16 repetitions of each key concept within the same lesson, presented in a different way, with the objective of ensuring that the knowledge is completely consolidated during the study process.

Relearning will allow you to learn with less effort and better performance, involving you more in your specialization, developing a critical mindset, defending arguments, and contrasting opinions: a direct equation to success.



A 100% online Virtual Campus with the best teaching resources

In order to apply its methodology effectively, TECH focuses on providing graduates with teaching materials in different formats: texts, interactive videos, illustrations and knowledge maps, among others. All of them are designed by qualified teachers who focus their work on combining real cases with the resolution of complex situations through simulation, the study of contexts applied to each professional career and learning based on repetition, through audios, presentations, animations, images, etc.

The latest scientific evidence in the field of Neuroscience points to the importance of taking into account the place and context where the content is accessed before starting a new learning process. Being able to adjust these variables in a personalized way helps people to remember and store knowledge in the hippocampus to retain it in the long term. This is a model called Neurocognitive context-dependent e-learning that is consciously applied in this university qualification.

In order to facilitate tutor-student contact as much as possible, you will have a wide range of communication possibilities, both in real time and delayed (internal messaging, telephone answering service, email contact with the technical secretary, chat and videoconferences).

Likewise, this very complete Virtual Campus will allow TECH students to organize their study schedules according to their personal availability or work obligations. In this way, they will have global control of the academic content and teaching tools, based on their fast-paced professional update.



The online study mode of this program will allow you to organize your time and learning pace, adapting it to your schedule”

The effectiveness of the method is justified by four fundamental achievements:

1. Students who follow this method not only achieve the assimilation of concepts, but also a development of their mental capacity, through exercises that assess real situations and the application of knowledge.
2. Learning is solidly translated into practical skills that allow the student to better integrate into the real world.
3. Ideas and concepts are understood more efficiently, given that the example situations are based on real-life.
4. Students like to feel that the effort they put into their studies is worthwhile. This then translates into a greater interest in learning and more time dedicated to working on the course.

The university methodology top-rated by its students

The results of this innovative teaching model can be seen in the overall satisfaction levels of TECH graduates.

The students' assessment of the teaching quality, the quality of the materials, the structure of the program and its objectives is excellent. Not surprisingly, the institution became the top-rated university by its students according to the global score index, obtaining a 4.9 out of 5.

Access the study contents from any device with an Internet connection (computer, tablet, smartphone) thanks to the fact that TECH is at the forefront of technology and teaching.

You will be able to learn with the advantages that come with having access to simulated learning environments and the learning by observation approach, that is, Learning from an expert.



As such, the best educational materials, thoroughly prepared, will be available in this program:



Study Material

All teaching material is produced by the specialists who teach the course, specifically for the course, so that the teaching content is highly specific and precise.

This content is then adapted in an audiovisual format that will create our way of working online, with the latest techniques that allow us to offer you high quality in all of the material that we provide you with.



Practicing Skills and Abilities

You will carry out activities to develop specific competencies and skills in each thematic field. Exercises and activities to acquire and develop the skills and abilities that a specialist needs to develop within the framework of the globalization we live in.



Interactive Summaries

We present the contents attractively and dynamically in multimedia lessons that include audio, videos, images, diagrams, and concept maps in order to reinforce knowledge.

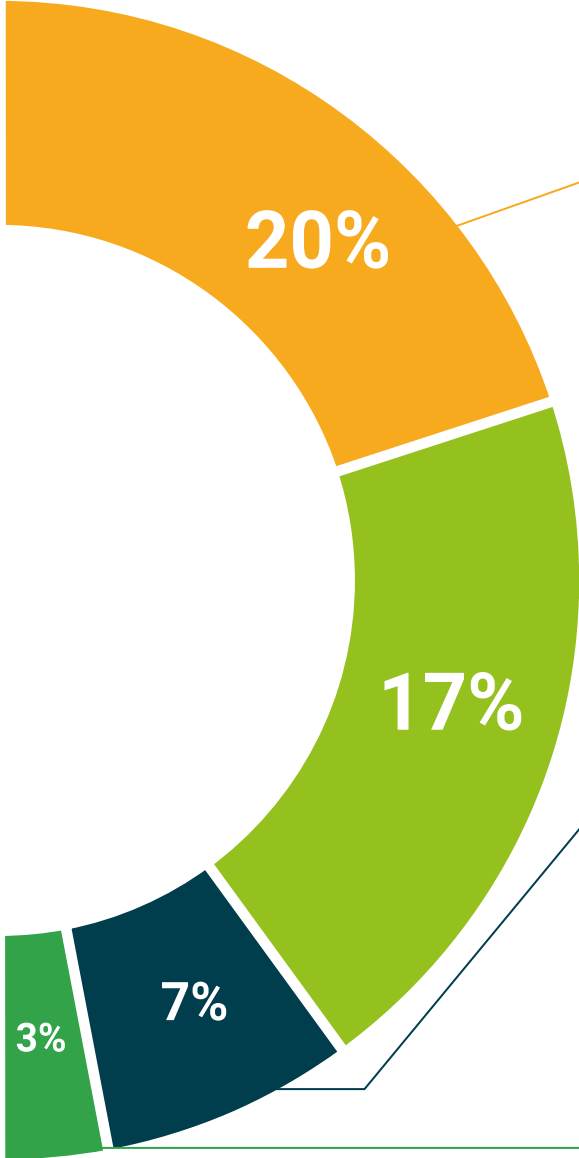
This exclusive educational system for presenting multimedia content was awarded by Microsoft as a "European Success Story".



Additional Reading

Recent articles, consensus documents, international guides... In our virtual library you will have access to everything you need to complete your education.





Case Studies

Students will complete a selection of the best case studies in the field. Cases that are presented, analyzed, and supervised by the best specialists in the world.



Testing & Retesting

We periodically assess and re-assess your knowledge throughout the program. We do this on 3 of the 4 levels of Miller's Pyramid.



Classes

There is scientific evidence suggesting that observing third-party experts can be useful.
Learning from an expert strengthens knowledge and memory, and generates confidence for future difficult decisions.



Quick Action Guides

TECH offers the most relevant contents of the course in the form of worksheets or quick action guides. A synthetic, practical and effective way to help students progress in their learning.



06

Teaching Staff

The teaching staff is made up of high-level professionals with a solid track record in the field of data analysis, business intelligence and advanced Salesforce management. In fact, the faculty not only stands out for its excellence in the use of this CRM platform, but also for its teaching ability to convey complex concepts in a clear and effective way. Thanks to their extensive experience in leading companies and digital transformation projects, the lecturers will offer an up-to-date and practical view of the use of advanced reporting and dashboard tools.



“

You will have the opportunity to learn from the best specialists and achieve a higher level of specialization in Salesforce Reporting and Dashboards. Come and be part of the world's largest online university according to Forbes!”

Management



Ms. Carrillo Pineda, Carmen

- ♦ CDP Data Specialist at Boehringer Ingelheim
- ♦ Degree in Journalism and Communication from the Universidad del Istmo
- ♦ Degree in Philosophy and Theology from the Pontifical University of the Holy Cross
- ♦ Master's Degree in Business Administration and Management from the IMF Business School
- ♦ Expert in Salesforce
- ♦ Specialist in Outbound Marketing from the Business School (Madrid)
- ♦ Expert in Business Intelligence (Power BI and Tableau) from the Center for Financial Studies



07

Certificate

This Postgraduate Certificate in Salesforce Reporting and Dashboards guarantees students, in addition to the most rigorous and up-to-date education, access to a diploma for the Postgraduate Certificate issued by TECH Global University.





Successfully complete this program and receive your university qualification without having to travel or fill out laborious paperwork"

This private qualification will allow you to obtain a diploma for the **Postgraduate Certificate in Salesforce Reporting and Dashboards** endorsed by **TECH Global University**, the world's largest online university.

TECH Global University, is an official European University publicly recognized by the Government of Andorra (*official bulletin*). Andorra is part of the European Higher Education Area (EHEA) since 2003. The EHEA is an initiative promoted by the European Union that aims to organize the international training framework and harmonize the higher education systems of the member countries of this space. The project promotes common values, the implementation of collaborative tools and strengthening its quality assurance mechanisms to enhance collaboration and mobility among students, researchers and academics.

This **TECH Global University** private qualification, is a European program of continuing education and professional updating that guarantees the acquisition of competencies in its area of knowledge, providing a high curricular value to the student who completes the program.

Title: **Postgraduate Certificate in Salesforce Reporting and Dashboards**

Modality: **online**

Duration: **6 weeks**

Accreditation: **6 ECTS**



*Apostille Convention. In the event that the student wishes to have their paper diploma issued with an apostille, TECH Global University will make the necessary arrangements to obtain it, at an additional cost.

future
health confidence people
education information tutors
guarantee accreditation teaching
institutions technology learning
community commitment
personalized service innovation
knowledge present
development language
classroom



Postgraduate Certificate Salesforce Reporting and Dashboards

- » Modality: online
- » Duration: 6 weeks
- » Certificate: TECH Global University
- » Accreditation: 6 ECTS
- » Schedule: at your own pace
- » Exams: online

Postgraduate Certificate Salesforce Reporting and Dashboards

