Salesforce NCCM Demo & Self-Directed Learning Resources

Salesforce Nonprofit Cloud Case Management (NCCM) System Demo

Follow this link for an introduction to and demonstration of Salesforce's NCCM application delivered by Provisio Partners CIO, Erica Cox. (The link above should start the video at the top of the demo presentation around 3:53.)

Trailhead Resources

Trailhead is a free and fun (in our opinion 🙂) platform provided by Salesforce that hosts a wealth of learning resources. All Trailhead learning modules can be combined in a Trail, a Salesforce-designed learning path focused on a specific learning objective, and Trailmixes, custom 'learning playlists' created by users. You can create a 'practice org' within Trailhead to practice your skills in a real Salesforce environment. Note you must create an account to access Trailhead.

Below is a list of recommended Trails to become more acquainted with your new NCCM system and build the skills of navigating Salesforce so you can hit the ground running!

Introductory Trailhead Courses

Understanding Salesforce – The Basics

- Understand Salesforce
- Navigate and Personalize Salesforce
- How to Set-up a Trailhead Playground

PMM/NCCM (this is the specific Salesforce App that WILS is using)
- Manage Programs with Salesforce for Nonprofits
- Nonprofit Cloud Case Management Basics

Admin/Super User Trailheads

The following resources are a deeper dive into topics that are more relevant for a Salesforce Admin or Super User. We recommend starting with the links noted with an asterisk* or with whatever interests you most!

The following is not necessary knowledge for an average system user, however the more you know about Salesforce, the more it can do for you! Deepening your Salesforce knowledge will help the system evolve with your organization.

Admin Basics

- [Navigate Setup](#)
- [User Management](#)
- [Create and Customize List Views](#)*

Data Management Tools

- [Use the Data Import Wizard](#)*
- [Data Loader](#)
- [Installing Data Loader](#)

Record Type, Page Layout, and Field Creation

- [Understand Custom & Standard Objects](#)*
- [Create Object Relationships](#)
- [Customize Record Details with Page Layouts](#)
- [Picklist Administration](#)*

Reports & Dashboards for Lightning Experience

- [Introduction to Reports and Dashboards in Lightning Experience](#)*
- [Create Reports with the Report Builder](#)*
- [Format Reports](#)

Data Management

- [Manage Data Effectively](#) (Multiple Resources)
- [Import Data](#)*
- [Export Data](#) (Data backup)

Data Security

- [Overview of Data Security](#)*
- [Control Access to the Org](#)
- [Control Access to Objects](#)
- [Control Access to Fields](#)
- [Control Access to Records](#)
- [Create a Role Hierarchy](#)*