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Tosa Salesforce

Exam Blueprint

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Introduction

to the Tosa® Exam Blueprint

For Tosa® Assessment and Certification

Tosa® (Test on Software Applications)

Tosa® assessments and certifications are designed to determine a candidate's proficiency level by evaluating their skills in office software and digital tools commonly used in a professional or educational environment.

These tests are specifically developed to validate the professional competencies of candidates looking to enhance their employability (employees, students, job seekers, and individuals undergoing career transitions).

Tosa® assessments and certifications are adaptive tests, developed using scientific methodologies. The scoring is based on Item Response Theory (IRT). The test algorithm adapts to each candidate's response in real time, adjusting the difficulty level of subsequent questions until it precisely determines the candidate's skill level by calculating the upper limit of their competencies. As a result, the tests provide a detailed and unique diagnosis of each candidate's abilities.

The rigor and reliability of Tosa® tests stem from the combination of a mathematical model for analyzing question difficulty and the relevance of the questions selected for each candidate (IRT).

Tosa® Exam Blueprint Objective

This exam blueprint outlines all the skills assessed within the domains and sub-domains of the Tosa® assessment and certification tests for Salesforce.

Tosa® assessment and certification solutions are designed to determine learners' proficiency levels using a single scoring scale—ranging from 0 to 1000 for certification—and divided into five levels, from "Beginner" to "Expert," for the assessment.

The purpose of this blueprint is to specify the technical knowledge expected at each level and within each of the four main skill categories of Salesforce. It is intended to help identify the most appropriate teaching or training programs to match a learner's target score.

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Unique Tosa® Scoring

The Tosa® assessments and certifications are based on a unique score, divided into five levels.

- Ranging from 1 to 1000 for the certification.
- Divided into five levels, from Beginner to Expert, for the assessment.

Beginner	Basic	Productive	Advanced	Expert
1-350	**351-550**	**551-725**	**726-875**	**876-1000**
Candidates' knowledge of the evaluated subject is limited.	Candidates have sufficient knowledge to perform simple tasks.	Candidates possess the skills needed to operate effectively in a professional environment.	Candidates have very strong knowledge and control of the subject matter being evaluated. Their productivity is excellent.	Candidates have an extensive knowledge of the subject evaluated. Their productivity in its use is optimal.
Certification failed	**Certification failed**	**Certification earned**	**Certification earned**	**Certification earned**
Certificate of completion issued	Certificate of completion issued	Diploma & Credly digital badge issued	Diploma & Credly digital badge issued	Diploma & Credly digital badge issued

About the Tosa® Salesforce certification

The Tosa Salesforce Certification relies on a database of more than 250 questions. It is composed of 35 questions from the question database and lasts for 1 hour. The algorithm adapts to each of the candidate's answers to adjust the difficulty level of the questions until reaching the candidate's skill limit. This ensures a precise and accurate result.

Since the test is adaptive, the series of questions that a candidate gets is unique for each test. This algorithm allows for a more accurate evaluation of the candidate's level. It also limits cheating and the memorization of questions on different passages.

Our platform allows individuals to take the certification in a classroom setting, an approved testing center, or remotely via our integrated asynchronous online proctoring solutions.

Our remote proctoring solutions provide added flexibility for both the administrator and the candidate, allowing the certification exam to be taken anywhere, at any time. The candidate only needs an internet connection and a computer equipped with a working webcam and microphone.

Candidates receive a numeric score out of 1000 points. This score corresponds to one of five proficiency levels. Candidates who score between 1 and 350 points do not earn the certification. They receive a certificate of completion in lieu of a diploma. Candidates who score 351 points or above earn the certification and will receive a diploma by email within five business days. If a candidate scores 551 points or above, they will also be eligible to receive a digital Credly badge.

There are no prerequisites to be eligible to take the exam, but to ensure a candidate is well prepared on exam day, we suggest they:

- Take at least one Tosa Salesforce adaptive assessment to estimate their level and get familiar with the test format
- Use the free practice tests on our website for training
- Follow an e-learning or training course (average duration per level is between 10 and 15 hours per certification, so around 150 hours total)

Tosa certification diplomas are valid for three years from the date of issue. This three-year period has been set to ensure that our certifications are consistently accurate and relevant, taking into account software version updates as well as the natural evolution of a candidate's skills over time. Limiting the certification period also reflects the need for life-long learning and continual professional development.

Tosa certifications can be retaken when they expire. Earners willing to improve their score and proficiency level can retake the exam at any time.

Tosa Sequence for Progressive Skills Development

Students and professionals can tailor their certification journey with Tosa through vertical progression, demonstrating increasing proficiency in Salesforce. Starting at a productive level, users can advance to advanced and expert levels as their skills grow. This clear path encourages continuous improvement and validates each stage of their development. Tosa's structure makes it easy to track progress and showcase evolving expertise.

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Isograd Learning Lab

The Isograd Learning Lab is a multifaceted and adaptable courseware solution designed to help learners prepare for Tosa certification exams. It offers personalized, self-paced, and fully interactive learning experiences, equipping candidates with the essential digital skills that employers seek. These skills span a wide and varied range, applicable to learners just starting their career journey to those wishing to advance on their path.

The browser-based platform supports all learning styles with a wide array of features, including in-application exercises. These in-application capabilities allow learners to experience real-world examples of specific tasks within a given software environment. The lab includes inclusive learning resources, along with extension activities and project-based learning challenges that foster creativity and critical thinking.

All course content on the Isograd Learning Lab is aligned to a Tosa exam blueprint, which is the foundation of any Tosa certification exam. By aligning course content to an exam blueprint, learners will be prepared to take the exam once they complete the courseware.

Exam Blueprint	Pre-Assessment	Courseware	Post-Assessment	Certification
1. Identify Outcomes	2. Identify Skill Gaps	3. Learn & Practice	4. Measure Progression	5. Certify Skills
Using a Tosa® exam blueprint, instructors integrate Tosa® certifications into their existing content or curriculum and set define outcomes.	Students begin with a formative pre-course assessment to identify their current skills level. Instructors gather data and adjust lesson plans based on students' results.	Instructors match courseware in the Isograd Learning Lab to student's proficiency levels and intended course objectives.	Once the courseware is completed, students take a summative assessment to verify their skills match the intended proficiency level. If skill gaps still exist, instructors can assign additional course content.	When instructors are satisfied with students' progress, certification exams are given.

Tosa® Salesforce Level Descriptions

At each level, candidates can:

Beginner

- Understand the basic concepts of Salesforce.
- Navigate the interface, locate key objects (accounts, leads, opportunities).
- Identify main elements in reports, dashboards, and calendars.
- Demonstrate limited ability to use Salesforce in a professional environment.

Basic

- Perform essential tasks such as creating accounts, contacts, and opportunities, managing campaigns, and organizing basic activities (calls, tasks, and events).
- Understand how to create and update records and use standard reports and dashboards.
- Are capable of basic CRM use for day-to-day operations.

Productive

- Work efficiently with Salesforce by customizing the interface (fields, layouts, views) and using automation features like workflows.
- Manage campaigns and opportunities, generate analytical reports, and synchronize calendars.
- Use Salesforce independently to manage clients and sales processes.

Advanced

- Master advanced configuration and automation tools such as Process Builder, approval processes, and Lightning Experience customization.
- Analyze and optimize sales and marketing data through detailed reports and dashboards.
- Use Salesforce strategically to improve team performance and business processes.

Expert

- Design and develop customized Salesforce solutions using Apex, Visualforce, and Lightning.
- Integrate Salesforce with other enterprise systems and creates custom applications.
- Train and support other users.
- Demonstrate full mastery of the platform to optimize business performance and digital transformation.

Business Applications

Attaining the Beginner score defines limited knowledge of the Salesforce platform, including the application's basic functions and features, highlighting the inability to use the application in a professional environment.	*For a sales or marketing assistant, skills at this level enable a candidate to create and update records for accounts, contacts, and opportunities; manage simple activities such as calls, tasks, or events; and generate standard reports and dashboards to monitor sales and customer interactions.*	*For a sales representative or CRM specialist, these skills enable a candidate to customize views and dashboards, manage campaigns and opportunities, automate recurring tasks through workflows, and synchronize calendars or emails. They can maintain reliable data and work efficiently across teams.*	*For a CRM administrator or sales operations manager, these skills enable a candidate to configure automation tools (Process Builder, approvals), customize Lightning pages, and create advanced reports and dashboards. They can optimize workflows, ensure data integrity, and support strategic decision-making.*	*For a Salesforce developer or CRM architect, these skills enable a candidate to design and build custom solutions using Apex, Visualforce, and Lightning components; integrate Salesforce with other enterprise systems; and lead platform optimization and user training across the organization.*

Domain 1: Tool Environment

Sub-domain 1: Interface and Navigation

Covers: Managing the App Launcher, quick search, and customizing the display (Lightning, menus, and list views).

Beginner

- Access elements in the application launcher
- Use the main menu and the quick search bar
- Locate created meetings in the calendar

Basic

- Identify the Salesforce object designating a potential customer
- Move a meeting in Salesforce

Productive

- Use the "Quick Find" bar to optimize searches and sort Salesforce objects
- Identify the required elements to create a meeting
- Know the characteristics of a meeting to move it
- Use the "Delete" option when canceling a meeting
- Identify mandatory fields when creating a list view
- Use the Salesforce profile menu features
- Identify user licenses allowing access to Salesforce via the mobile app

Advanced

- Connect to their Salesforce Organization via the smartphone app
- Understand the concept of “Lightning Experience” in Salesforce and its features
- Master calendar display options
- Cancel a meeting and know the event details
- Edit the display of their Salesforce environment and describe a Lightning page
- Edit the display of their Salesforce environment

Expert

- Edit the display of their Salesforce environment and describe a Lightning page
- Edit the display of their Salesforce environment
- Use the setup menu to manage settings and access features in Salesforce
- Identify users frequently involved in configuration
- Use the “Show All” option in the App Launcher for quick actions

Sub-domain 2: Reports and Dashboards

Covers: Creating, editing, and automating reports and dashboards; using charts and performance indicators.

Beginner

- Identify the zoom and detailed view area in the Dashboard Accounts Report

Basic

- Create and set up a dashboard
- Update records displayed on the dashboard
- Know the different types of charts available for a report
- Add charts to a report
- Schedule the sending of a report

Productive

- Edit a dashboard
- Improve the title description to better describe the skills assessed in the report
- Use the "Measure" component on a dashboard
- Refresh dashboard content
- Use Salesforce reports to group, present, and compare data with rows and columns
- Understand the differences in report rights and their impact on editing

Advanced

- Add different types of charts to a report
- Use dashboards in Salesforce for better data management
- Change the graphical component to a gauge on the dashboard
- Create and share a custom dashboard with specific users within an organization
- Edit the title of a dashboard component for appropriate display

Expert

- Know the required right to delete an obsolete report
- Correct errors in a report
- Differentiate report editing rights on leads
- Know possible actions on a report

Sub-domain 3: Data Management and Configuration

Covers: Creating and updating records, managing objects, fields, and access permissions.

Beginner

- N/A

Basic

- Configure data display in a view

Productive

- Know the required elements when entering and saving opportunity data
- Configure display and optimize registration page settings
- Differentiate types of email templates for scheduling automatic messages
- Schedule automatic messages and create notifications (repeated at Expert level but relevant for configuration context)

Advanced

- Describe a sales opportunity in Salesforce
- Create a custom contact

Expert

- Schedule automatic messages and create notifications

Domain 2: Client Relationship Management

Sub-domain 1: Accounts and Contacts

Covers: Creating, editing, and associating accounts and contacts.

Beginner

- Locate the required account

Basic

- Know the different methods of creating contacts
- Add a new account to the list
- Associate a contact to an account
- Identify account information and locate its characteristics

Productive

- Create an account
- Edit an account
- Identify contacts linked to multiple accounts

Advanced

- Edit a contact from their record
- Create a new contact in the "Accounts" tab
- Know the consultable elements in the "Associated" tab of an account
- Link a contact to an account

Expert

- Link a contact to an account
- Know different methods for editing contacts
- Identify non-critical elements when editing an account
- Verify account data

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Sub-domain 2: Leads and Prospects

Covers: Qualifying, converting, and tracking the status of leads and prospects.

Beginner

- Display details of the first lead in the list
- Identify the location to delete a lead

Basic

- Edit a lead

Productive

- Identify and convert a lead into an account
- Use the lead duplication function
- Transfer a lead to a colleague
- Know the conversion possibilities after the “Converted” stage when creating an account from a lead
- Change the owner of a lead

Advanced

- N/A

Expert

- Manage a lead with errors
- Determine non-required elements when creating a lead

Sub-domain 3: Campaigns and Marketing

Covers: Creating, executing, monitoring, and analyzing marketing campaigns.

Beginner

- N/A

Basic

- Analyze campaign results using the correct object
- Cancel a campaign

Productive

- Analyze campaign results and create a dashboard to evaluate performance
- Use the email sending feature from a campaign to a list of member persons
- Create a distribution list
- Create a campaign report

Advanced

- Use different types of reports
- Remove a campaign from a list
- Know best practices for scheduling a campaign
- Postpone sending campaign emails

Expert

- Schedule a campaign
- Postpone sending campaign emails

Domain 3: Organization of the Activity

Sub-domain 1: Tasks and Activity Tracking

Covers: Creating, transferring, and monitoring tasks and activity history.

Beginner

- Identify the required elements when modifying a task
- Identify actions not available in the history of an object's activity

Basic

- Complete a task using best practices
- Transfer a task and know how many people it is transferred to

Productive

- Identify the different methods of creating a task
- Know possible recipients when transferring tasks
- Edit the task transfer field to another person
- Add a future task
- Distinguish non-linkable elements to a default task
- Update the activity flow in Salesforce
- Edit a task
- Edit an object's history

Advanced

- Set a due date for an upcoming task
- Use the "Transfer" function

Expert

- N/A

Sub-domain 2: Communication and Interactions

Covers: Managing emails, calls, and events in Salesforce.

Beginner

- N/A

Basic

- N/A

Productive

- Send and receive emails from a lead
- Distinguish required and optional elements for sending an email
- Display received emails in Salesforce
- Record a client email exchange

Advanced

- Know who to transfer an email to

Expert

- Forward an email
- Record client information following a phone call
- Describe the Softphone concept in a call center
- Use the Open CTI tool to make calls from the browser and platform of choice

Sub-domain 3: Collaboration Tools and Integration

Covers: Synchronizing Salesforce with external calendars (Outlook, Google), integrating tools such as Softphone and Call Center.

Beginner	• N/A
Basic	• Create an event
Productive	• Identify objects that can be attached to an event
Advanced	• Attach an existing opportunity to a recorded phone call • Attach objects to an event • Know the steps to install the Call Center • Add Softphone in the Salesforce app
Expert	• Attach objects to an event • Know the steps to install the Call Center • Add Softphone in the Salesforce app • Understand the Open CTI of the call center • Edit an application to add the Salesforce Softphone

Domain 4: Sales Process Management

Sub-domain 1: Opportunities and Sales Cycle

Covers: Creating, tracking, converting, and closing opportunities.

Beginner

- Understand the utility of statuses in managing and organizing leads
- Know the possible options to convert an opportunity into a customer account

Basic

- Understand the concept of status in Salesforce
- Know best practices for managing an obsolete opportunity

Productive

- Define an opportunity in the context of converted deals
- Delete or close an opportunity
- Convert an opportunity into a customer account
- Know the editing and creation options for an opportunity
- Postpone the processing of an opportunity
- Create a task on an opportunity
- Link objects to convert an opportunity into a customer account
- Create and use a status
- Convert a status and revert to the previous status
- Schedule and close a task on a lead

Advanced

- Create an opportunity
- Edit an opportunity
- Revert to a previous status
- Advance to the next status
- Differentiate lead conversion options into opportunities
- Convert a lead into an opportunity
- Close an opportunity

Expert

- Identify objects with available statuses

Sub-domain 2: Automation and Process Integrity

Covers: Setting up workflows, Process Builder, validation rules, and Lightning Knowledge.

Beginner

- N/A

Basic

- N/A

Productive

- Trigger the progression of an automated process
- Complete an automated sales process after a successful lead

Advanced

- Know automation processes

Expert

- N/A

Sub-domain 3: Knowledge Base and Documentation

Covers: Managing articles, categories, and access rights within the Salesforce Knowledge Base.

Beginner
- N/A

Basic
- Publish an article on Salesforce
- Delete a category group
- Delete articles

Productive
- Understand the utility of the Lightning Knowledge configuration flow
- Identify the types of deletable articles

Advanced
- Create articles
- Know access rights to a knowledge base
- Understand the meaning of an expired article and its implications

Expert
- Identify required fields when creating a category group
- Activate a knowledge base
- Configure a knowledge base with Lightning Knowledge
- Understand the effects of manipulation on a published article
- Create and manage categories in Salesforce

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