

Salesforce - Administration Essentials for new Admins (ADM 201)

Code:	ADM-201
Length:	5 days
URL:	View Online

This comprehensive hands-on course is a must for new Salesforce administrators. Administration Essentials for New Admins is the core training that ensures your success with Salesforce. For maximum benefit, we recommend administrators take this course before starting a Salesforce deployment or when taking over an existing deployment. Note: You can take this course either in person or via our virtual classroom. Participants can save travel expenses by taking the class virtually. Both formats provide demonstrations, hands-on exercises, and personal attention from the instructor as well as interaction with your peers.

Skills Gained

- Customize your application, including page layouts, fields, tabs, and business processes.
- Create a secure Salesforce environment.
- Maintain and import clean data.
- Create high-value reports and dashboards.
- Setup workflow automation.

Who Can Benefit

Administration Essentials for New Admins is designed for new system administrators responsible for the setup, configuration, and maintenance of their organizations' Salesforce applications. Other groups that benefit from this course include power users, sales operations, and IT managers. Note that administrators of Salesforce Professional Edition should take Administration Essentials (Professional Edition).

Prerequisites

The prerequisites include a solid understanding of basic Salesforce concepts and functionality and completion of the following online courses:

- Getting Started: Navigating Salesforce
- Getting Started: Using the Sales Cloud

Course Details

Getting Around the App

- Data Model and Navigation
- Help & Training

Setting Up the User Interface

- Setting Up the UI and Search Options

Setting Up and Managing Users

- Managing User Profiles
- Managing Users
- Troubleshooting Login Issues

Security and Data Access

- Restricting Logins
- Determining Object Access
- Setting Up Record Access
- Creating a Role Hierarchy
- Dealing with Record Access Exceptions
- Managing field-level security

Customization: Fields

- Administrating Standard Fields
- Creating New Custom Fields
- Creating Selection Fields: Picklists and Lookups
- Creating Formula Fields
- Working with Page Layouts
- Working with Record Types and Business Processes
- Maintaining data quality

Managing Data

- Import Wizards
- Data Loader
- Mass Transfer
- Backing Up Data
- Mass Delete and the Recycle Bin

Reports and Dashboards

- Running and Modifying Reports
- Creating New Reports with the Report Builder
- Working with Report Filters
- Summarizing with Formulas and Visual Summaries
- Printing, Exporting, and Emailing Reports
- Building Dashboards

Automation

- Workflow Rules
- Lead and Case Automation

Collaboration

- Chatter and Chatter Free
- Email Administration and Email Templates
- Tracking Tasks and Events

Service Cloud

- Automating Support
 - Understanding the Service Cloud Console
 - Collaborating in the Service Cloud
 - Analyzing Support Data: Support Reports and Dashboards
-