

ADMINISTRATION ESSENTIALS FOR NEW ADMINISTRATORS

Course Description

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.

COURSE TITLE

ID: ADM-201

Length: 5 days

Price: \$ 4,500.00

Course Audience

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). 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 Outline

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

Administering 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


Available Dates

01/22/2018 12:00 pm - 01/26/2018 6:00 pm 

01/29/2018 12:00 pm - 02/02/2018 6:00 pm 

02/05/2018 12:00 pm - 02/09/2018 6:00 pm 

02/26/2018 9:00 am - 03/02/2018 6:00 pm 

03/05/2018 9:00 am - 03/09/2018 6:00 pm 

03/12/2018 12:00 pm - 03/16/2018 6:00 pm 