

ADMINISTRATION ESSENTIALS FOR NEW ADMINS



CURRICULUM

Who should take this course?

Administration Essentials for New Admins is designed for:

- New system administrators responsible for the setup, configuration, and maintenance of their organization's Salesforce applications
- Other groups that would benefit from deepening their knowledge of Salesforce, including power users, sales operations, and IT managers

Prerequisites

The prerequisites include a solid understanding of basic Salesforce concepts and functionality, and completion of the following online courses, which are available at help.salesforce.com.

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

What you will learn

When you complete this course, you'll be able to:

- 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
- Set up workflow automation

MODULES & TOPICS

Getting Around the App

- Understand the data model and navigation
- Find answers in Help & Training

Getting Your Organization Ready for Users

- Set up the company profile
- Configure the user interface
- Set up activities and calendars
- Configure search settings
- Set up Chatter

Setting Up and Managing Users

- Manage user profiles
- Create and manage users
- Troubleshoot user login issues
- Understand Salesforce capabilities
- Set up Chatter Free

Security and Data Access

- Restrict logins
- Determine object access

- Profile
- Permission set
- Manage field-level security
 - Profile
 - Permission set
- Manage record access
 - OWD
 - Manual Sharing
 - Criteria based sharing
 - Role hierarchy

Customization: Fields

- Administer standard fields
- Create new custom fields
- Create selection fields: picklists and lookups
- Create formula fields
- Work with page layouts
- Work with record types and business processes
- Maintain data quality

Managing Data

- Import new records using import wizards
- Update existing records with the data loader
- Mass transfer records between users
- Back up data with a weekly export
- Mass delete records
- Workbench
- Dataloader.io

Reports and Dashboards

- Run and modify reports
- Create new reports with the report builder
- Filter reports
- Summarize report data with formulas and visual summaries
- Print, export, and email reports
- Build dashboards

Automation

- Manage email administration
- Set up workflow rules and Process Builder
- Automate leads and cases

Managing the Support Process*

- For virtual classroom attendees, this content is delivered as an online module.
- Automate the support process
- Understand the the Salesforce Console
- Enable collaboration in the Service Cloud
- Analyze support data with reports and dashboards

Partners :



Java



development | consultancy | training

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