

Administration Essentials for New Admins

Duration
5 days

Delivery Format
Classroom or virtual classroom

Certification
Administration Essentials for New Admins is recommended as preparation for the Salesforce Certified Administrator exam.

Comprehensive and hands-on, Administration Essentials for New Admins is the core training that ensures your success with Salesforce. It's a must for new administrators. We recommend administrators take this course before starting a Salesforce deployment or when taking over an existing deployment.

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

You can take this course in person or in a 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. For the virtual class, all you need is a web browser and a telephone to watch, listen, and get hands-on experience with the application.

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

Administration Essentials for New Admins

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 SalesforceA capabilities
- Set up Chatter Free and Chatter external users
- Understand Salesforce1 settings

Security and Data Access

- Restrict logins
- Determine object access
- Set up record access
- Manage record access with the role hierarchy
- Deal with record access exceptions
- Control access to events
- Manage field-level security

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
- Keep records up to date with Data.com and social accounts and contacts
- Mass transfer records between users
- Back up data with a weekly export
- Mass delete records

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

About Salesforce University

Salesforce University offers a comprehensive catalog of courses and certifications to help you administer and develop your organization's Salesforce environment. Whether you need a customized private course for your whole team or an in-depth instructor-led classroom experience for one person, Salesforce University can help you take the next steps on your journey to success. Contact us today to learn how we can help you get the most out of your Salesforce investment.

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