ADMINISTRATION ESSENTIALS FOR NEW ADMINS

OVERVIEW

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.

WHEN YOU COMPLETE THIS COURSE, YOU WILL 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

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

DURATION

- 5 days

DELIVERY FORMAT

- Classroom
- Virtual Classroom
- Virtual Evening Class

CERTIFICATION

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

REGISTER NOW →

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MODULES & TOPICS

Getting Around the App
- Understand the data model and navigation
- Explore the Lightning Experience
- 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
- Enable mobile access with Salesforce1

Setting Up and Managing Users
- Manage user profiles
- Create and manage users
- Troubleshoot user login issues
- Understand SalesforceA capabilities
- Set up Chatter Free Users and Invites

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
- 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
- Email Templates
- 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 Salesforce Console
- Enable collaboration in the Service Cloud
- Analyze support data with reports and dashboards