



## **COURSE CONTENT**

# Administration Essentials for New Admins (ADM201)

## Overview

Become a Salesforce.com Certified Administrator! This comprehensive hands-on course is a must for new Salesforce administrators. For maximum benefit, we recommend administrators take this course before starting a Salesforce deployment or when taking over an existing deployment.

### **Who should take this course?**

- 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

### **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

## **Administrative Essentials for New Admins Pre-work**

Please complete the following before attending our expert-led class.

## Lessons and 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



# Administrative Essentials for New Admins in Lightning Experience + Certification (ADX201C)

## Overview

Extensive and interactive, Administrative Essentials for New Admins in Lightning Experience is the core training that ensures your success with Salesforce Lightning. It's a must for new administrators, and we recommend completing this course before starting a Salesforce deployment or when taking over an existing deployment.

### **Who should take this course?**

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 Lightning Experience, including power users, sales operations, and IT managers.

### **When you complete this course, you will be able to:**

- Customize your application, including page layouts, fields, tabs, and business processes in Lightning Experience.
- Learn how security settings created in Salesforce Classic are applied in Lightning.
- Maintain and import clean data in Lightning.
- Use Lightning features to create high-value reports and dashboards
- Understand how workflow automation complies with Lightning.

## Administrative Essentials for New Admins Pre-work

Please complete the following before attending our expert-led class.

## Lessons and Topics

### **Getting Around the App**

- Data Model and Navigation
- Lightning Experience
- Help & Training

## Getting Your Organization Ready for Users

- Setting Up the Company Profile
- Configuring the User Interface
- Setting Up Activities and Calendars
- Configuring Search Settings
- Setting Up Chatter Groups
- Mobile Access with Salesforce1

## Setting Up and Managing Users

- Managing User Profiles
- Managing Users
- Setting Up Chatter Free Users and Invites
- 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

## Object Customizations

- 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
- Data.com
- Mass Transfer
- Backing Up Data
- Mass Delete and 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**

- Email Templates
- Workflow Rules
- Process Builder
- Lead Automation

## **Managing the Support Process**

- Managing and Resolving Cases
- Customizing a Support Process
- Automating Support
- Understanding the Salesforce Console for Service
- Collaborating in the Service Cloud
- Analyzing Support Data



# Certification Preparation for Administrator (CRT101)

## Overview

Are you ready to take the next step in your career by becoming a Salesforce Certified Administrator? By covering the details around the exam objectives, this course will help hone your problem-solving skills and reinforce your knowledge of key topics. Instructors will present different administration and configuration scenarios tied to the exam objectives. Questions related to these scenarios will help you prepare for your exam.

### **Who should take this course?**

Certification Preparation for Administrator is designed for experienced Salesforce administrators who are planning to take the Salesforce Administrator Certification.

### **When you complete this course, you will be able to:**

- Understand the different exam objectives and their weighting on the exam
- Know which product areas to focus on to best prepare for your exam
- How to approach exam questions
- Additional resources available to help prepare for the exam



# Administrative Essentials for New Admins in Lightning Experience (ADX201)

## Overview

Extensive and interactive, Administrative Essentials for New Admins in Lightning Experience is the core training that ensures your success with Salesforce Lightning. It's a must for new administrators, and we recommend completing this course before starting a Salesforce deployment or when taking over an existing deployment.

### **Who should take this course?**

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 Lightning Experience, including power users, sales operations, and IT managers.

### **When you complete this course, you will be able to:**

- Customize your application, including page layouts, fields, tabs, and business processes in Lightning Experience.
- Learn how security settings created in Salesforce Classic are applied in Lightning.
- Maintain and import clean data in Lightning.
- Use Lightning features to create high-value reports and dashboards
- Understand how workflow automation complies with Lightning.

## Administrative Essentials for New Admins Pre-work

Please complete the following before attending our expert-led class.



## Getting Around the App

- Data Model and Navigation
- Lightning Experience
- Help & Training

## Getting Your Organization Ready for Users

- Setting Up the Company Profile
- Configuring the User Interface
- Setting Up Activities and Calendars
- Configuring Search Settings
- Setting Up Chatter Groups
- Mobile Access with Salesforce1

## Setting Up and Managing Users

- Managing User Profiles
- Managing Users
- Setting Up Chatter Free Users and Invites
- 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

## Object Customizations

- 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
- Data.com
- Mass Transfer
- Backing Up Data
- Mass Delete and 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**

- Email Templates
- Workflow Rules
- Process Builder
- Lead Automation

## **Managing the Support Process**

- Managing and Resolving Cases
- Customizing a Support Process
- Automating Support
- Understanding the Salesforce Console for Service
- Collaborating in the Service Cloud
- Analyzing Support Data



# Administrative Essentials for New Admins in Lightning Experience - Extended (ADX201E)

## Overview

Extensive and interactive, Administrative Essentials for New Admins in Lightning Experience is the core training that ensures your success with Salesforce Lightning — and it's now available in a flexible and virtual format! The new delivery gives you the option to get up to speed with the learning included in the **Administrative Essentials for New Admins in Lightning Experience (ADX201) class** over the course of 10 days. This course is perfect for anyone looking to dedicate less than 4 hours of learning a day over a 2-week period.

### Who should take this course?

- 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 Lightning Experience, including power users, sales operations, and IT managers

### When you complete this course, you will be able to:

- Customize your application, including page layouts, fields, tabs, and business processes in Lightning Experience.
- Learn how security settings created in Salesforce Classic are applied in Lightning.
- Maintain and import clean data in Lightning.
- Use Lightning features to create high-value reports and dashboards
- Understand how workflow automation complies with Lightning.

## Administrative Essentials for New Admins Pre-work

Please complete the following before attending our expert-led class.

## Lessons and Topics

### Getting Around the App

- Data Model and Navigation
- Lightning Experience
- Help & Training

## Getting Your Organization Ready for Users

- Setting Up the Company Profile
- Configuring the User Interface
- Setting Up Activities and Calendars
- Configuring Search Settings
- Setting Up Chatter Groups
- Mobile Access with Salesforce1

## Setting Up and Managing Users

- Managing User Profiles
- Managing Users
- Setting Up Chatter Free Users and Invites
- 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

## Object Customizations

- 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
- Data.com
- Mass Transfer
- Backing Up Data
- Mass Delete and 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**

- Email Templates
- Workflow Rules
- Process Builder
- Lead Automation

## **Managing the Support Process**

- Managing and Resolving Cases
- Customizing a Support Process
- Automating Support
- Understanding the Salesforce Console for Service
- Collaborating in the Service Cloud
- Analyzing Support Data