

Administration Essentials for New Admins (ADM 201)

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

HEAD OFFICE

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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

Live Chat

Enquire Now

Call back Request

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