Administration Essentials for New Admins Training

Duration: **5 Day**

BILGINÇ IT Academy
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Overview

This comprehensive hands-on course is a must for new administrators. Administration Essentials for New Admins is the core training that ensures your success with business. For maximum benefit, we recommend administrators take this course before starting a Salesforce deployment or when taking over an existing deployment.

Prerequisites

There are no prerequisites for this course.

Who Should Attend

- Administration Essentials for New Admins is designed for:
- New system administrators responsible for the setup, configuration, and maintenance of their organizations
- Other groups that benefit from this course include power users, sales operations, and IT managers.

What You Will Learn

- 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.
- Setup workflow automation.

Outline

1. Getting Around the App

- Data Model and Navigation
- Help and Training

2. Setting Up the User Interface (UI)

- Setting Up the UI and Search Options

3. Getting Your Organization Ready for Users

- Setting Up the Company Profile
- Configuring the UI
- Configuring Search Settings

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4. Setting Up and Managing Users

- Managing User Profiles
- Managing Users
- Troubleshooting Login Issues

5. 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

6. Customization: Fields

- Administrating Standard Fields
- Creating New Custom Fields
- Creating Selection Fields
- Picklists
- Lookups
- Creating Formula Fields
- Working with Page Layouts
- Working with Record Types and Business Processes
- Maintaining Data Quality

7. Managing Data

- Import Wizards
- Data Loader
- Mass Transfer
- Backing Up Data
- Mass Delete and the Recycle Bin

8. 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 E-Mailing Reports
- Building Dashboards

9. Automation

- Workflow Rules
- Lead and Case Automation

10. Collaboration

- Chatter and Chatter Free
- E-Mail Administration and E-Mail Templates
- Tracking Tasks and Events

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11. Service Cloud

- Automating Support
- Service Cloud Console
- Collaborating in the Service Cloud
- Analyzing Support Data
- Support Reports
- Dashboards