



Salesforce Service Cloud (Administrator)

ADM201: Salesforce Administration Essentials for New Admins

If you are an existing Salesforce Administrator who wants to learn the techniques and best practices to ensure the success of your deployment and sit for the Salesforce Administrator Certification examination, then this is the class for you.

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- 5 Days

Upcoming Dates

Course Description

In this five-day comprehensive and hands-on course, you will learn the fundamentals you'll need as a Salesforce Administrator, ranging from topics such as how to set up, configure, and maintain your Salesforce instance, to how to set up workflow automation. This is a combination learn & certify class, which gives you the option to sit for the highly valued Salesforce Administrator certification exam on the final day of class. If you want some more time, you'll be able to conserve your certification exam voucher for use at a later date.

Course Outline

Getting Around the Application

- 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
- Configure Search Settings
- Set Up Chatter

Setting Up and Managing Users

- Manage User Profiles
- Create and Manage Users
- Troubleshoot User Login Issues
- Understand Salesforce 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
- 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
- Automate the Support Process

- Understand the Salesforce Console for Service
- Enable Collaboration in the Service Cloud
- Analyze Support Data with Reports and Dashboards
- Managing the Support Process

Audience

Administration Essentials for Administrators is ideal for:

- System administrators responsible for the setup, configuration, and maintenance of their organization's Salesforce applications.
- Power users, sales operations personnel, and IT managers that would benefit from deepening their knowledge of Salesforce.
- People who are interested in taking the Salesforce Certified Administrator Exam.

Prerequisites

It is recommended that you have a solid understanding of basic Salesforce concepts and functionality. In addition, you should have completed 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 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
- Understand the main topic areas of the Salesforce Certified Administrator exam