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 trailmix on Trailhead:
• Administrative Essentials for New Admins Pre-work
ADMINISTRATION ESSENTIALS
FOR NEW ADMINS

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