ADMINISTRATION ESSENTIALS FOR NEW ADMINS: PROFESSIONAL EDITION

OVERVIEW
Administration Essentials for New Admins: Professional Edition is a must for all administrators wanting to maximize implementation of Salesforce Professional Edition. This is the core training that ensures your success with Salesforce. The class will focus on the features and tools needed to manage Salesforce Professional Edition implementation. For maximum benefit, we recommend administrators take this course before starting a Salesforce deployment.

WHO SHOULD TAKE THIS COURSE?
Administration Essentials for New Admins: Professional Edition is designed for anyone responsible for the setup, configuration, and data for an organization’s Salesforce Professional Edition implementation.

WHEN YOU COMPLETE THIS COURSE, YOU WILL BE ABLE TO:
• Set up and manage users
• Customize the application to your specific needs including creating custom fields and page layouts
• Import data and manage data quality

PREREQUISITES
The prerequisites include an understanding of basic Salesforce concepts and functionality and completion of the following online courses, which is available at www.salesforce.com or, for salesforce.com customers, right from the Help site in Salesforce.
• Getting Started: Navigating Salesforce

DURATION
• 2 days

DELIVERY FORMAT
• Classroom
• Virtual Classroom

AUDIENCE
• New administrators of Salesforce Professional Edition

REGISTER NOW ➔
ADMINISTRATION ESSENTIALS
FOR NEW ADMINS:
PROFESSIONAL EDITION

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
• Understand the company profile
• Learn about the user interface
• Configure search settings
• Set up list views

Setting up and managing users
• Understand user profiles
• Manage users
• Troubleshoot login issues
• Computer activation

Security and data access
• Set up record access
• Create a role hierarchy
• Deal with record access exceptions
• Manage field-level security

Customization
• Administer standard fields
• Create new custom fields
• Create selection fields: picklists and lookups
• Create formula fields
• Work with page layouts
• Maintain data quality with validation rules

Managing data
• Import records with import wizards
• Mass transfer records
• Merge records
• Back up data
• Mass delete records and use the recycle bin

Activity management
• Email templates
• Track tasks and events