

## Administration Essentials (EE/UE)

### ADM201

#### Duration

Classroom – 4 days  
Virtual classroom – 5 days

#### Delivery Format

Classroom or virtual classroom

#### Certification

ADM201 prepares you to take the Salesforce.com Certified Administrator exam. The exam is included in the price of the course.



This comprehensive hands-on course is a must for all administrators. Administration Essentials is the core training that ensures your CRM success. In this course, you learn best practices on how to set up, configure, and maintain your Salesforce CRM sales, support, and marketing functionality. For maximum benefit, we recommend administrators take this course before starting a Salesforce CRM deployment or when taking over an existing deployment.

#### Who should take this course?

**Administration Essentials** is designed for new system administrators responsible for the setup, configuration, and maintenance of their organizations' Salesforce CRM applications. Other groups that benefit from this course include power users, sales operations, and IT managers. Note that administrators of Salesforce CRM Professional Edition should take ADM202.

**Note: You can take this course either in person or via our virtual classroom.** Participants can save travel expenses and time away from the office 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.

#### Prerequisites

A solid understanding of basic Salesforce CRM concepts and functionality. Completion of the following online courses is mandatory:

- ⌘ Getting Started with Salesforce CRM Navigation
- ⌘ Getting Started with Salesforce CRM Sales

#### What you will learn

When you complete this course, you'll be able to:

- ⌘ Customize your application, including page layouts, fields, tabs, and business processes
- ⌘ Create a secure Salesforce CRM environment
- ⌘ Maintain and import clean data
- ⌘ Create high-value reports and dashboards
- ⌘ Use the specialized features of Salesforce CRM Sales, Salesforce CRM Marketing, Salesforce CRM Service, the Administration Console, and the AppExchange

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“The Salesforce CRM administrator training allowed me to fully utilize Salesforce CRM as a tool and was essential for moving our company to the next level.”

— Kimberly McCoskey  
Business Development Manager  
Spatial NetWorks, Inc.

**Course Outline: ADM201 Administration Essentials**

**Security Confirmation**

- ⌘ Activate your computer

**Navigation**

- ⌘ Set up Admin options & UI

**Organization Administration**

- ⌘ Set your organization's language & locale
- ⌘ Manage currency

**Customization**

- ⌘ Create custom profiles & custom fields
- ⌘ Define dependent picklists
- ⌘ Customize lookup fields & formula fields
- ⌘ Customize page layouts
- ⌘ Customize standard related lists
- ⌘ Learn about record types & business processes
- ⌘ Use field-level security

**Security & Access**

- ⌘ Create & manage your users
- ⌘ Set organization-wide defaults
- ⌘ Learn about record access
- ⌘ Create the role hierarchy
- ⌘ Learn about role transfer & mass transfer functionality
- ⌘ Learn about the Sharing model
- ⌘ Manually share records
- ⌘ Set up opportunity team selling & account teams
- ⌘ Learn about folder access

**Workflow**

- ⌘ Define workflow
- ⌘ Set up workflow rules
- ⌘ Set up workflow tasks & alerts

**Workflow Approvals**

- ⌘ Plan approvals using workflow
- ⌘ Use the approval wizard – standard vs. jump start
- ⌘ Create workflow approvals

**Data Validation**

- ⌘ Learn about Salesforce CRM data validation
- ⌘ Create data validation rules
- ⌘ Learn about custom field unique and duplicate properties
- ⌘ Execute an initial import
- ⌘ Update via the import wizard

**Data Utilities**

- ⌘ Importing overview
- ⌘ Learn about import solutions & custom object records using the data loader
- ⌘ Use mass delete
- ⌘ Initiate weekly export
- ⌘ Use storage

**Analytics**

- ⌘ Create custom reports
- ⌘ Use advanced filters
- ⌘ Use conditional highlighting
- ⌘ Use custom summary formulas
- ⌘ Use dashboards

**Marketing Administration**

- ⌘ Terminology overview
- ⌘ Use the Integrated Campaign Builder
- ⌘ Learn about lead assignment setup
- ⌘ Learn Web-to-lead & auto-response rules

**Service & Support Administration**

- ⌘ Learn about case escalation
- ⌘ Identify solution categories, & suggested solutions
- ⌘ Set up the self-service portal
- ⌘ Mass manage self-service portal users

**Administration Console**

- ⌘ Navigate the Administration Console
- ⌘ Create a Administration Console

**Extending Salesforce CRM**

- ⌘ Learn about custom objects
- ⌘ Learn about custom tabs
- ⌘ Learn about custom Web tabs
- ⌘ Build a custom app

**The AppExchange**

- ⌘ The AppExchange
- ⌘ Install an app
- ⌘ Delete an app

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