

## AGENDA

### PROFESSIONAL EDITION ADMINISTRATOR WORKSHOP

---

#### Monday 8:30 AM – 4:30 PM

---

- 8:30 AM – 9:00 AM **Opening and Introductions**
- 9:00 AM – 9:15 AM **Overview**
- General Overview of Salesforce
- 9:15 AM – 9:45 AM **Organization Administration**
- Setting Your Organization's Language & Locale
  - Setting Up Multi-Currency
- 9:45 AM – 12:00 PM **Customization**
- Creating Custom Fields
  - Defining Dependent Picklists
  - Customizing Lookup Fields and Formula Fields
  - Customizing Page Layouts
- 12:00 PM – 1:00 PM **Lunch**
- 1:00 PM – 2:00 PM **Customization (cont'd)**
- Customizable Standard Related Lists
  - Customizable Home Tab
- 2:00 PM – 4:30 PM **Security & Access**
- Managing & Creating Your Users
  - Setting Organization Wide Defaults
  - Understanding Record Access
  - Understanding & Creating The Role Hierarchy
  - Role Transfer and Mass Transfer Functionality

---

#### Tuesday 8:30 AM – 4:30 PM

---

- 8:30 AM - 10:00 AM **Security & Access (cont'd)**
- Understanding the Sharing Model
  - Manually sharing records
  - Folder Access
- 10:00 AM – 12:00 PM **Data Utilities**
- Import Overview
  - Executing An Initial Import
  - Updating Via Import
  - Importing Solutions and Custom Object Records
  - Using Mass Delete
  - Understanding Storage Utilization (attachments, documents, and records)
- 12:00 PM – 1:00 PM **Lunch**
- 1:00 PM – 3:30 PM **Analytics**
- Creating Custom Reports
  - Advanced Filters
  - Conditional Highlighting
  - Custom Summary Formulas
  - Dashboards

## AGENDA

### PROFESSIONAL EDITION ADMINISTRATOR WORKSHOP

3:30 PM – 4:30 PM

#### Marketing Administration

- Terminology Overview
- Lead Assignment Setup

---

## Wednesday 8:30 AM – 5:00 PM

---

8:30 AM - 10:00 AM

#### Marketing Administration (cont'd)

- Web-to-Lead and Auto Response Rules
- Lead Conversion

10:00 AM – 12:00 PM

#### Support Administration

- Case Escalation
- Solution Categories
- Suggested Solutions
- Setting up the Self-Service Portal
- Mass Managing Self-Service Portal Users

12:00 PM – 1:00 PM

#### Lunch

1:00 PM – 3:00 PM

#### Extending Salesforce

- Custom Objects
- Custom Tabs
- Custom Web Tabs
- Building a Custom App

3:00 PM – 4:30 PM

#### The AppExchange

- The AppExchange
- Installing an App
- Deleting an App

4:30 PM – 5:00 PM

#### Resources