

## ADM 201 (EE/UE) / ADM 202 (PE) Administration Essentials

### Duration

4 days for ADM 201

3 days for ADM 202

### Delivery Format

Classroom

### Certification

ADM 201 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 Sales, Support, and Marketing functionality.

For maximum benefit, 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** is designed for new system administrators responsible for the setup, configuration, and maintenance of their organizations' Salesforce applications. Other groups that benefit from this course include power users, sales operations, and IT managers. Administrators of Unlimited or Enterprise Edition should take ADM 201; administrators of Professional Edition should take ADM 202.

**Note:** ADM 201 prepares you to take the Salesforce.com Certified Administrator exam. The exam is included in the price of the course.

### Prerequisites

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

- :: ADM 100 Salesforce Fundamentals
- :: SFA 101 Sales Representative Fundamentals

### 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
- :: Use the specialized features of Salesforce Marketing, Salesforce Service and Support, Salesforce Console, and the Force.com AppExchange

**REGISTER ONLINE:** Check available classes at [www.salesforce.com/uk/training](http://www.salesforce.com/uk/training).

To speak with a training & certification expert, contact your local salesforce.com office or call +353 1 4403333

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

— Kimberly McCoskey  
Business Development Manager  
Spatial NetWorks, Inc.

**Course Outline: ADM 201 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

**Client Management**

- ⌘ Create person accounts

**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 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

**Salesforce Console**

- ⌘ Navigate the Salesforce Console
- ⌘ Create a Salesforce Console

**Extending Salesforce**

- ⌘ 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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