

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

Premier Training: Crank Up Your ROI

Imagine if your whole team had access to the entire salesforce.com course catalog, including unlimited seats in our classes, certification for key roles, and hours of exclusive, up-to-the-minute online training content. Learn more about Premier Training: our new unlimited, subscription-based training service. Visit www.salesforce.com/premier.

“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

REGISTER ONLINE: Check available classes at www.salesforce.com/uk/training. To speak with a training & certification expert, contact your local salesforce.com office or call +353 1 440333.



Corporate Headquarters
The Landmark @ One Market
Suite 300
San Francisco, CA, 94105
United States

1-800-NO-SOFTWARE
www.salesforce.com

Latin America
+52-55-9171-1857

Japan
+81-3-5785-8301

Asia/Pacific
+65-6302-5700

Europe, Middle East & Africa
+4121-6953700

Copyright ©2009, salesforce.com, inc. All rights reserved. Salesforce.com and the “no software” logo are registered trademarks of salesforce.com, inc., and salesforce.com owns other registered and unregistered trademarks. Other names used herein may be trademarks of their respective owners.

DS_ADM201_UK_120209