

Administration Essentials (PE)

ADM202

Duration

Classroom – 3 days

Virtual Classroom (20 hours – 4 days
for 5 hours per day)

Delivery Format

Classroom or Virtual Classroom



This comprehensive hands-on course is a must for all administrators of Salesforce CRM Professional Edition.

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. This course also covers data utilities, security, and analytics, and explores the key features of the Salesforce CRM applications. For maximum benefit, we recommend administrators take this course before starting a Salesforce CRM deployment or when taking over an existing deployment.

Note: You can now take this course either in person or via our virtual classroom! Participants in the virtual classroom format can save money traveling and time away from the office. Both formats provide demonstrations, interactivity, hands-on exercises, and personal attention from the instructor and interaction with your peers. To participate, you view the course presentation via a Web browser and use a telephone conference to listen and talk to the instructor and other participants.

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.

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 SFA

What You Will Learn

When you complete this course, you will be able to:

- ⚡ Customize your application, including page layouts, fields, and tabs
- ⚡ Create a secure Salesforce CRM environment
- ⚡ Maintain and import clean data
- ⚡ Create high-value reports and dashboards
- ⚡ Use the specialized features of Salesforce CRM SFA, Salesforce CRM Marketing, Salesforce CRM Service & Support, the Administration Console, and the Force.com 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: ADM202 (PE) 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 fields
- ⌘ Define dependent picklists
- ⌘ Customize lookup fields & formula fields
- ⌘ Customize page layouts
- ⌘ Customize standard related lists

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
- ⌘ Learn about folder access

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
- ⌘ 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 an Administration Console

Extending Salesforce CRM

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

The Force.com AppExchange

- ⌘ The Force.com AppExchange
- ⌘ Install an app
- ⌘ Delete an app

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