

ADM 201: Salesforce Administration Essentials



Knowledge is power. In this comprehensive, hands-on administrator workshop you gain that power by learning and practicing how to set up, configure, and maintain your Salesforce applications (Enterprise or Unlimited Edition) for optimal results. It's the core training you need to ensure your CRM success—and the first step in building your Salesforce knowledgebase.

To get the most from this workshop, we recommend that you take this course *before* starting your deployment. However, it will be useful at any stage of a deployment, as well as for new administrators coming on board.

Duration: 5 days

Pricing: €2700 or £2000

Who Should Participate in this Workshop?

The workshop is designed for system administrators who are responsible for the overall setup, configuration, and maintenance of your Salesforce applications. Other groups that benefit from this workshop include power users, sales operations, marketing users, and IT. During the workshop, participants will get an overview of how to set up and configure sales, support, and marketing functionality—the cornerstone to successful CRM.

Pre-Requisites:

The administrator workshop assumes a solid understanding of the basic elements of the Salesforce application. Completion of the following online courses (go to Help & Training after you log in to your Salesforce application) is mandatory:

- ❑ Salesforce Fundamentals
- ❑ Sales Representative Fundamentals
- ❑ Administrator Fundamentals: Setup
- ❑ Administrator Fundamentals: Customization
- ❑ Reporting Fundamentals

What You Will Learn:

At the end of this workshop, you will be able to:

- ❑ Customize your application, including page layouts, fields, tabs, and business processes
- ❑ Create high-value reports and dashboards
- ❑ Create customer-support routing strategies
- ❑ Drive user adoption and usage of your investment
- ❑ Leverage best practices from your peers
- ❑ Use the AppExchange to download or build custom Salesforce applications

REGISTER ONLINE: Check the Services section of our Web site at <http://www.salesforce.com/eu/services-training/education-services/>



Key Topics and Approach

ADM 201 gives you the knowledge you need to make the most of your Salesforce implementation. This interactive, hands-on class will provide real world examples and answer your questions about how to best use the many Salesforce application features in your every-day work.

Selected topics include:

- ⚡ Custom Profiles
- ⚡ Custom Formulas
- ⚡ Managing User Access
- ⚡ Org Sharing Models
- ⚡ Workflow Rules
- ⚡ Importing Data
- ⚡ Custom Reports
- ⚡ Self-Service Portal
- ⚡ Custom Objects

Course Outline

- ⚡ Welcome
- ⚡ Navigation
- ⚡ Organization Administration
- ⚡ Customization
- ⚡ Client Management
- ⚡ Security and Access
- ⚡ Workflow and Approvals
- ⚡ Data Validation
- ⚡ Data Utilities
- ⚡ Analytics
- ⚡ Marketing Administration
- ⚡ Salesforce Console
- ⚡ Extending Salesforce
- ⚡ The AppExchange

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