

AGENDA - ADM 201
EE/UE ADMINISTRATION ESSENTIALS

Day 1 9:15 AM – 5:00 PM

Welcome and Introductions

Overview

- General Overview of Salesforce

Navigation

- Admin Options
- UI Setup

Organization Administration

- Setting Your Organization's Language & Locale
- Managing Currency

Customization

- Creating Custom Profiles
- Creating Custom Fields
- Defining Dependent Picklists
- Customizing Lookup Fields and Formula Fields

Lunch

Customization (cont'd)

- Customizing Page Layouts
- Customizable Standard Related Lists
- Understanding Record Types and Business Processes
- Field Level Security

Day 2 9:00 AM – 5:00 PM

Customization (cont'd)

Client Management

- Person Accounts

Security & Access

- Managing & Creating Your Users
- Setting Organization Wide Defaults
- Understanding Record Access
- Understanding & Creating The Role Hierarchy
- Role Transfer and Mass Transfer Functionality

Lunch

Security & Access (cont'd)

- Understanding the Sharing Model
- Manually sharing records
- Setting Up Opportunity Team Selling and Account Teams
- Folder Access

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Day 3 9:00 AM – 5:00 PM

Workflow

- Defining Workflow
- Setting up Workflow Rule
- Setting up Workflow Tasks and Alerts

Workflow Approvals

- Planning Approvals using Workflow
- Using the Approval Wizard – Standard vs. Jump Start
- Creating Workflow Approvals

Data Validation

- Defining Salesforce Data Validation
- Create Data Validation Rules
- Explain Custom Field Unique/Duplicate Properties

Data Utilities

- Import Overview
- Executing An Initial Import
- Updating Via Import

Lunch

Data Utilities (cont'd)

- Importing Solutions and Custom Object Records Using Data Loader
- Using Mass Delete
- Initiating Weekly Export
- Understanding Storage Utilization (attachments, documents, and records)

Day 4 9:00 AM – 5:00 PM

Analytics

- Creating Custom Reports
- Advanced Filters
- Conditional Highlighting
- Custom Summary Formulas
- Dashboards

Marketing Administration

- Terminology Overview
- Utilizing The Integrated Campaign Builder
- Lead Assignment Setup
- Web-to-Lead and Auto Response Rules

Lunch

Service & Support Administration

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

Salesforce Console

- Navigating the Salesforce Console
- Creating a Salesforce Console

Day 5 9:00 AM – 5:00 PM

Extending Salesforce

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

The AppExchange

- The AppExchange
- Installing an App
- Deleting an App

Resources

Challenge Exercises