

ADM-202

Salesforce: Administration Essentials (PE)



Knowledge is power. In this comprehensive, hands-on course, you gain that power by learning and practicing how to set up, configure, and maintain your Salesforce applications (Professional 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 benefit, 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: 3 days
Delivery Format: Classroom

Who Should Take this Course?

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

Prerequisites

This course 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:

- :: ADM-100 Salesforce Fundamentals
- :: SFA-101 Sales Representative Fundamentals
- :: ADM-110 Administrator Fundamentals: Setup
- :: ADM-115 Administrator Fundamentals: Customization
- :: ADM-120 Reporting Fundamentals

What You Will Learn

After attendees complete this course, they will provide significant business value by:

- :: Increasing visibility into your business
- :: Creating high-value reports and dashboards
- :: Creating customer-support routing strategies
- :: Driving user adoption and usage of your investment
- :: Leveraging best practices from peer students
- :: Customizing your application, including page layouts, fields, tabs, and business processes
- :: Using the AppExchange to download or build custom Salesforce applications



Course Outline

Overview

- :: General Overview of Salesforce

Navigation

- :: Admin Options
- :: UI Setup

Organization Administration

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

Customization

- :: Creating Custom Fields
- :: Defining Dependent Picklists
- :: Customizing Lookup Fields and Formula Fields
- :: Customizing Page Layouts
- :: Customizable Standard Related Lists

Security & Access

- :: Managing & Creating Your Users
- :: Setting Organization Wide Defaults
- :: Understanding Record Access
- :: Understanding & Creating The Role Hierarchy
- :: Role Transfer and Mass Transfer Functionality
- :: Understanding the Sharing Model (PE specific rules)
- :: Manually sharing records
- :: Folder Access

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

Analytics

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

Lead Administration

- :: Terminology Overview
- :: Lead Assignment Setup
- :: Web-to-Lead and Auto Response Rules
- :: Lead Conversion

Service & Support Administration

- :: 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

Extending Salesforce

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

The AppExchange

- :: The AppExchange
- :: Installing an App
- :: Deleting an App

Resources