

ADMINISTRATION ESSENTIALS FOR NEW ADMINISTRATORS + CERTIFICATION



OVERVIEW

If you are an existing Salesforce Administrator who wants to learn the techniques and best practices to ensure the success of your deployment and sit for the Salesforce Administrator Certification examination, then this is the class for you.

In this five-day comprehensive and hands-on course, you will learn the fundamentals you'll need as a Salesforce Administrator, ranging from topics such as how to set up, configure, and maintain your Salesforce instance, to how to set up workflow automation. This is a combination learn & certify class, which gives you the option to sit for the highly valued Salesforce Administrator certification exam on the final day of class. If you want some more time, you'll be able to conserve your certification exam voucher for use at a later date.

WHO SHOULD TAKE THIS COURSE?

Administration Essentials for Administrators + Certification is ideal for:

- System administrators responsible for the setup, configuration, and maintenance of their organization's Salesforce applications.
- Power users, sales operations personnel, and IT managers that would benefit from deepening their knowledge of Salesforce.
- People who are interested in taking the Salesforce Certified Administrator Exam.


WHEN YOU COMPLETE THIS COURSE, YOU WILL BE ABLE TO:

- Customize your application, including page layouts, fields, tabs, and business processes
- Create a secure Salesforce environment
- Maintain and import clean data
- Create high-value reports and dashboards
- Set up workflow automation
- Understand the main topic areas of the Salesforce Certified Administrator exam.

PREREQUISITES

It is recommended that you have a solid understanding of basic Salesforce concepts and functionality. In addition, you should have completed the following online courses, which are available at help.salesforce.com:

- Getting Started: Navigating Salesforce
- Getting Started: Using the Sales Cloud



DURATION

- 5 days

DELIVERY FORMAT

- Classroom

CERTIFICATION

- NOTE: This course is not designated as a specific certification preparation course. Customers who sit for the certification exam should have experience beyond what is covered in this course.
- As an additional benefit of taking this specific course, on the afternoon of the fifth day, we provide exam proctoring for those who wish to sit for the exam onsite.
- The exam voucher is included in this course fee

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MODULES & TOPICS

Getting Around the Application

- Understand the Data Model and Navigation
- Explore the Lightning Experience
- Find Answers in Help & Training

Getting Your Organization Ready for Users

- Set Up the Company Profile
- Configure the User Interface
- Configure Search Settings
- Set Up Chatter
- Enable mobile access with Salesforce1

Setting Up and Managing Users

- Manage User Profiles
- Create and Manage Users
- Troubleshoot User Login Issues
- Understand Salesforce Capabilities
- Set up Chatter Free Users and Invites

Security and Data Access

- Restrict Logins
- Determine Object Access
- Set Up Record Access
- Manage Record Access with the Role Hierarchy
- Deal with Record Access Exceptions
- Manage Field-Level Security

Customization: Fields

- Administer Standard Fields
- Create New Custom Fields
- Create Selection Fields: Picklists and Lookups
- Create Formula Fields
- Work with Page Layouts
- Work with Record Types and Business Processes
- Maintain Data Quality

Managing Data

- Import New Records Using Import Wizards
- Update Existing Records with the Data Loader
- Keep Records Up to Date with Data.com
- Mass Transfer Records Between Users
- Back Up Data with a Weekly Export
- Mass Delete Records

Reports and Dashboards

- Run and Modify Reports
- Create New Reports with the Report Builder
- Filter Reports
- Summarize Report Data with Formulas and Visual Summaries
- Print, Export, and Email Reports
- Build Dashboards

Automation

- Email Templates
- Set Up Workflow Rules and Process Builder
- Automate Leads and Cases
- Automate the Support Process
- Understand the Salesforce Console for Service
- Enable Collaboration in the Service Cloud
- Analyze Support Data with Reports and Dashboards
- Managing the Support Process



LEARN

Learn at your own pace, from our experts, and your peers.

EARN

Earn points, badges, and skill-based credentials that grow your resume.

CONNECT

Connect with fellow Trailblazers to learn, inspire, and blaze new trails.

CONTACT US

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