

## SALESFORCE ADMIN TRAINING (CONFIGURING AND CUSTOMIZING THE PLATFORM)

### MODULES & TOPICS

#### Getting Around the App

- 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
- Set up activities and calendars
- 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 SalesforceA 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
- Control access to events
- 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

#### Managing the Support Process\*

- Automate the support process
- Understand the Salesforce Console
- Enable collaboration in the Service Cloud
- Analyze support data with reports and dashboards

\* Total 16 man.hours (2days) training.

\*\* Cost: 2400 \$ (Payment in advance).

\*\*\* Maximum 4 attendees.