



# Administration Essentials

## (Enterprise Edition/Unlimited Edition) (ADM201)

This comprehensive hands-on course is a must for new Salesforce administrators. Administration Essentials is the core training that ensures your success with Salesforce. For maximum benefit, we recommend administrators take this course before starting a Salesforce deployment or when taking over an existing deployment.

### Who should take this course?

**Administration Essentials** is designed for new system administrators responsible for the setup, configuration, and maintenance of their organizations' Salesforce applications. Other groups that benefit from this course include power users, sales operations, and IT managers. Note that administrators of Salesforce CRM Professional Edition should take Administration Essentials (Professional Edition) (ADM202).

**Note: You can take this course either in person or via our virtual classroom.** Participants can save travel expenses and time away from the office by taking the class virtually. Both formats provide demonstrations, hands-on exercises, and personal attention from the instructor as well as interaction with your peers. For the virtual class, all you need is a Web browser and a telephone to watch, listen, and get hands-on experience with the application.

### Prerequisites

The prerequisites include a solid understanding of basic Salesforce concepts and functionality and completion of the following online courses, which are available at [www.salesforce.com](http://www.salesforce.com) or, for salesforce.com customers, right from the Help Site in Salesforce:

- Getting Started with Salesforce CRM Navigation
- Getting Started with Salesforce CRM Sales

### What you will learn

When you complete this course, you'll 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

### Duration

Classroom – 4 days  
Virtual classroom – 5 days

### Delivery Format

Classroom or virtual classroom; for self-paced online training, visit [www.salesforce.com/premier](http://www.salesforce.com/premier) to learn about our subscription-based training and support solutions.

### Certification

ADM201 is recommended as preparation for the Salesforce.com Certified Administrator exam. The exam is included in the price of the classroom and virtual classroom courses.

“The Salesforce CRM administrator training allowed me to fully utilize Salesforce CRM as a tool and **was instrumental for moving our company to the next level.**”

Kimberly McCoskey  
Business Development Manager  
Spatial Networks, Inc.

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## Course Outline: Administration Essentials (ADM201)

Topic	Objective
<b>Getting Around the App</b>	<ul style="list-style-type: none"> <li>• Data model and navigation</li> <li>• Help &amp; Training</li> </ul>
<b>Setting Up the User Interface</b>	<ul style="list-style-type: none"> <li>• Setting up the UI and search options</li> </ul>
<b>Getting Your Organization Ready for Users</b>	<ul style="list-style-type: none"> <li>• Setting up the Company Profile</li> <li>• Configuring the UI</li> <li>• Configuring search settings</li> </ul>
<b>Setting Up and Managing Users</b>	<ul style="list-style-type: none"> <li>• Managing user profiles</li> <li>• Managing users</li> <li>• Troubleshooting login issues</li> </ul>
<b>Security and Data Access</b>	<ul style="list-style-type: none"> <li>• Restricting logins</li> <li>• Determining Object access</li> <li>• Setting up Record access</li> <li>• Creating a Role Hierarchy</li> <li>• Dealing with Record access exceptions</li> <li>• Managing field-level security</li> </ul>
<b>Customization: Fields</b>	<ul style="list-style-type: none"> <li>• Administrating standard Fields</li> <li>• Creating new custom Fields</li> <li>• Creating selection Fields: Picklists and Lookups</li> <li>• Creating Formula Fields</li> <li>• Working with Page Layouts</li> <li>• Working with Record Types and business processes</li> <li>• Maintaining data quality</li> </ul>
<b>Managing Data</b>	<ul style="list-style-type: none"> <li>• Import Wizards</li> <li>• Data loader</li> <li>• Mass transfer</li> <li>• Backing up data</li> <li>• Mass delete and the Recycle Bin</li> </ul>
<b>Reports and Dashboards</b>	<ul style="list-style-type: none"> <li>• Running and modifying reports</li> <li>• Creating new reports with the Report Builder</li> <li>• Working with Report Filters</li> <li>• Summarizing with Formulas and Visual Summaries</li> <li>• Printing, exporting, and emailing reports</li> <li>• Building dashboards</li> </ul>
<b>Automation</b>	<ul style="list-style-type: none"> <li>• Workflow rules</li> <li>• Lead and case automation</li> </ul>
<b>Collaboration</b>	<ul style="list-style-type: none"> <li>• Chatter and Chatter Free</li> <li>• Email administration and email templates</li> <li>• Tracking tasks and events</li> </ul>



### Register Online

Check available classes at [www.salesforce.com/training](http://www.salesforce.com/training). To speak with a training & certification expert, contact your local salesforce.com office or call 1-877-TRAIN10.

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