Administration Essentials for new Admins (ADM 201)

Course Details

Getting Around the App

- Data Model and Navigation
- Help & Training

Setting Up the User Interface

- Setting Up the UI and Search Options

Setting Up and Managing Users

- Managing User Profiles
- Managing Users
- Troubleshooting Login Issues

Security and Data Access

- Restricting Logins
- Determining Object Access
- Setting Up Record Access
- Creating a Role Hierarchy
- Dealing with Record Access Exceptions
- Managing field-level security

Customization: Fields

- Administrating Standard Fields
- Creating New Custom Fields
- Creating Selection Fields: Picklists and Lookups
- Creating Formula Fields
- Working with Page Layouts
- Working with Record Types and Business Processes
- Maintaining data quality

Managing Data

- Import Wizards
- Data Loader
- Mass Transfer
- Backing Up Data
- Mass Delete and the Recycle Bin

Reports and Dashboards

- Running and Modifying Reports
- Creating New Reports with the Report Builder
- Working with Report Filters

- Summarizing with Formulas and Visual Summaries
- Printing, Exporting, and Emailing Reports
- Building Dashboards

Automation

- Workflow Rules
- Lead and Case Automation

Collaboration

- Chatter and Chatter Free
- Email Administration and Email Templates
- Tracking Tasks and Events

Service Cloud

- Automating Support
- Understanding the Service Cloud Console
- Collaborating in the Service Cloud
- Analyzing Support Data: Support Reports and Dashboards