

**AGENDA – ADM 201**  
**EE/UE ADMINISTRATION ESSENTIALS**  
**4 Day**

<b>Day 1 Agenda</b>	
<b>Time</b>	<b>Topics</b>
<b>30 minutes</b>	<b>Welcome and Introductions</b>
<b>30 minutes</b>	<b>Overview of Salesforce</b>
<b>30 minutes</b>	<b>Introduction to Identity Confirmation</b> <ul style="list-style-type: none"> <li>• Activating your Computer</li> </ul>
<b>30 minutes</b>	<b>User Interface Settings</b> <ul style="list-style-type: none"> <li>• Admin Permissions</li> <li>• UI Options</li> </ul>
<b>30 minutes</b>	<b>Organization Administration</b> <ul style="list-style-type: none"> <li>• Language, Locale, Fiscal Year</li> <li>• Currency Management</li> </ul>
<b>1 hour</b>	<b>Customization</b> <ul style="list-style-type: none"> <li>• Creating Profiles</li> <li>• Creating Custom Fields</li> </ul>
<b>1 hour</b>	<b>Lunch</b>
<b>4 hours</b>	<ul style="list-style-type: none"> <li>• Customization (continued)</li> <li>• Defining Dependent Picklists</li> <li>• Customizing Lookup Fields and Formula Fields</li> <li>• Customizing Page Layouts and Related Lists</li> </ul>
<b>Day 2 Agenda</b>	
<b>Time</b>	<b>Topics</b>
<b>1 hour</b>	<b>Customization (Continued)</b> <ul style="list-style-type: none"> <li>• Record Types and Business Processes</li> <li>• Field Level Security</li> <li>• Login Hours and IP Restrictions</li> </ul>
<b>15 minutes</b>	<b>Review</b>
<b>2 hours 15 min</b>	<b>Security and Access</b> <ul style="list-style-type: none"> <li>• Creating Users</li> <li>• Understanding Record Ownership and Access</li> <li>• Organization Wide Defaults</li> <li>• Role Hierarchy</li> </ul>
<b>1 hour</b>	<b>Lunch</b>
<b>2 hours</b>	<ul style="list-style-type: none"> <li>• Role Hierarchy (continued)</li> </ul>

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	<ul style="list-style-type: none"> <li>• Mass Transfer Records</li> <li>• Sharing Rules</li> <li>• Manual Sharing and Team Sharing</li> <li>• Folder Access</li> </ul>
<b>2 hours</b>	<b>Workflow</b> <ul style="list-style-type: none"> <li>• Defining Workflow</li> <li>• Creating Workflow Rules with Tasks, Alerts and Field Updates</li> </ul>
<b>Day 3 Agenda</b>	
<b>Time</b>	<b>Topics</b>
<b>15 minutes</b>	<b>Review</b>
<b>1 hour 45 minutes</b>	<b>Workflow Approvals</b> <ul style="list-style-type: none"> <li>• Planning an Approval Process</li> <li>• Creating an Approval Process</li> <li>• Testing an Approval Process</li> </ul>
<b>1 hour</b>	<b>Data Validation</b> <ul style="list-style-type: none"> <li>• Defining Salesforce Data Validation</li> <li>• Creating Custom Validation Rules</li> <li>• Defining Custom Field Properties</li> </ul>
<b>30 minutes</b>	<b>Data Utilities</b> <ul style="list-style-type: none"> <li>• Import Overview</li> </ul>
<b>1 hour</b>	<b>Lunch</b>
<b>2 hours</b>	<b>Data Utilities</b> <ul style="list-style-type: none"> <li>• Import using Application Import Wizard</li> <li>• Update using Apex Data Loader</li> <li>• Mass Delete</li> <li>• Weekly Data Export</li> <li>• Understanding Storage (attachments, documents, and records)</li> </ul>
<b>2 hours</b>	<b>Analytics</b> <ul style="list-style-type: none"> <li>• Understanding Different Types of Reports</li> <li>• Creating Custom Reports</li> <li>• Advanced Filters</li> <li>• Custom Highlighting</li> <li>• Custom Summary Formulas</li> </ul>

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<b>Day 4 Agenda</b>	
<b>Time</b>	<b>Topics</b>
<b>45 minutes</b>	<b>Analytics (continued)</b> <ul style="list-style-type: none"> <li>• Dashboards</li> </ul>
<b>15 minutes</b>	<b>Review</b>
<b>30 minutes</b>	<b>Appexchange</b> <ul style="list-style-type: none"> <li>• Installing an App</li> <li>• Uninstalling an App</li> </ul>
<b>2 hours</b>	<b>Marketing Administration</b> <ul style="list-style-type: none"> <li>• Terminology Overview</li> <li>• Creating Campaigns</li> <li>• Integrated Campaign Builder</li> <li>• Lead Assignment, Lead Queues</li> </ul>
<b>1 hour</b>	<b>Lunch</b>
<b>30 minutes</b>	<b>Marketing Administration (continued)</b> <ul style="list-style-type: none"> <li>• Web to Lead, Auto Assignment Rules</li> <li>• Tracking Campaign Results</li> </ul>
<b>1 hour</b>	<b>Service and Support Administration</b> <ul style="list-style-type: none"> <li>• Overview of Cases and Solutions</li> <li>• Case Escalation</li> <li>• Solution Categories and Suggested Solutions</li> </ul>
<b>30 minutes</b>	<b>Salesforce Console</b> <ul style="list-style-type: none"> <li>• Navigating the Console</li> <li>• Creating a Console Layout</li> </ul>
<b>1 hour 45 minutes</b>	<b>Extending Salesforce</b> <ul style="list-style-type: none"> <li>• Custom Object Relationships</li> <li>• Creating Custom Objects</li> <li>• Custom Tabs</li> <li>• Rollup Summary Fields</li> <li>• Creating Custom Apps</li> </ul>
<b>15 minutes</b>	<b>Wrap up</b> <ul style="list-style-type: none"> <li>• Where to go for information</li> <li>• Survey</li> </ul>