

AGENDA – ADM 201
EE/UE ADMINISTRATION ESSENTIALS
4 Day

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

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

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