



Introduction to Salesforce Administration & Configuration SPADM203

Course ID #: 6510-100-00-W

Hours: 35

Course Content

Course Description:

This class was developed to teach students the basics of Salesforce and help students prepare for both the Salesforce Certified Administrator exam and the Force.com Certified Platform App Builder exam. This class is an alternative to both the Administration Essentials for New Admins (ADM 201), and the portions of the Building Applications with Force.com and Visualforce (DEV401) included in the Certified Platform App Builder exam.

A student in this class will learn how to administer Salesforce, configure Salesforce and develop new applications utilizing the Force.com platform.

This class is delivered by a senior instructor with many years of real world Salesforce experience and is specifically designed to prepare consultants to pass BOTH the Salesforce Certified Administrator Exam and the Force.com Certified Platform App Builder exam. The instructor will cover all the basic administration concepts within Salesforce in addition to sharing real world experiences and best practices.

The class presents a broad range of topics covering just about everything on which a student will be tested. These topics include but are not limited to: basic administration, the Force.com architecture, configuration, customization and data management. There is in depth coverage of system security topics such as: Users, Licenses, Profiles, Field Level Security, Permission Sets, Record Security, Organization Wide Defaults, Role Hierarchy & Roles, Sharing Rules, Account Teams, Sales Teams, and Queues. The object model related to sales force automation, marketing automation and service is thoroughly covered as well with sections on: Accounts, Contacts, Opportunities, Products & Price Books, Quotes, Leads, Campaigns, Cases, Solutions, Knowledge, Ideas and Answers. The automation of processes within Salesforce including the use of Workflow Rules, Approval Processes, and the Process Builder will be discussed and used in scenario driven exercises. Students will also learn to develop new applications on the Force.com platform using the declarative interface. Analytics, including reports, dashboards, and list views will be covered in detail as well. Students will be introduced to Lightning Experience, Lightning Connect, Lightning Components, Lightning Pages, Lightning Community Builder and Actions.



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As a participant in the class, each student will be given a practice learning environment to use during hands-on exercises during the class. The student will be able to use this learning environment indefinitely after the class without any additional fee.

Target Student:

People with a strong technical background, such as system administrators, developers, or consultants, who have experience with another CRM or ERP system and are looking to quickly develop equivalent skills on Salesforce.

Prerequisites:

To ensure your success in this course, you should possess end-user skills such as creating and managing opportunities, or have basic administrative experience such as setting up or managing the Sales Cloud® (Accounts, Contacts, opportunities, and so forth). You can obtain this level of skills and knowledge by taking the following course: Salesforce.com for Sales Representatives.

Topics:

Day 1

- Agenda and course overview
- Introduction to GenWatt
- Setting up a practice site
- Salesforce.com overview
- Organization settings
- System security
- Force.com architecture and model, view, controller
- Apex and Visualforce overview
- Record security

Day 2

- Folder access
- Customization
- Field-level security
- Security and sharing knowledge check
- Customization
- Products and price books
- Quotes

- Sales productivity tools
- Field history

Day 3

- Service relationships
- Case assignment rules
- Escalation rules
- Community relationships
- Object relationships
- Lookup and Master Detail fields
- Schema Builder
- Rollup Summary fields
- Lookup Field filters
- Recruiting application
- Setup audit trail



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Day 4

- Automation
- Debugging
- Data validation
- Workflow
- Approval processes
- User interface settings
- Search settings
- Salesforce record IDs
- Import wizards
- Data loader
- Mass transfer
- External IDs
- Upsert
- Mass delete
- Weekly data export
- List views
- Reports

Day 5

- Reports(Cont.)
- Dashboards
- Knowledge Check
- Marketing relationships
- Leads
- Campaigns
- Content
- Partner portal
- Force.com sites
- Administrator exam prep
- Developer exam prep
- Supplemental materials
- Session wrap-up