



ADMINISTRATION ESSENTIALS FOR NEW ADMINS: ADX-201

TRAINING THE
TRAILBLAZERS
OF TOMORROW



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TRAINING THE TRAILBLAZERS OF TOMORROW

The Administration Essentials for New Admins is a comprehensive, week-long course for individuals who wish to learn the fundamentals of Salesforce. If you want to learn how to configure and manage Salesforce and work to continuously improve features and capabilities, this course is for you. The time is now to start your journey on the path to being a trailblazer in the Salesforce ecosystem. Join and take the first step towards a future of new opportunities.

Course highlights

Obtain a comprehensive vision of Salesforce Administration essentials with Salesforce certified instructors. Learning the fundamentals of Salesforce applications will enhance your portfolio and give you a competitive advantage in the workplace, giving you the skills of tomorrow, today.



One week, in-person



Taught in Spanish
Materials in English



ISDI, Digital Acceleration Center
(Viriato 20, Madrid)



Salesforce certified instructors



40 hours of classroom training
(TBD)



Small class size allows more
personalized learning

Outcomes

Upon completion of the Administration Essentials For New Admins: ADX-201, you will be able to:

Customize your application, including page layouts, fields, tabs, and business processes. Create a

1. secure Salesforce environment.
2. Maintain and import clean data.
3. Create high-value reports and dashboards. Set
4. up workflow automation.
- 5.

You'll also be ready to move on to the next step in becoming a fully certified Administrator, pending completion of the Administration Essentials For Experienced Admins: CRT-211 course.

Aimed at

New system administrators responsible for the setup, configuration, and maintenance of their organization's Salesforce applications. Other groups that would benefit from deepening their knowledge of Salesforce, including power users, sales operations, and IT managers.

> Content & Methodology

Getting around the app

- Understand the data model and navigation
- Explore the Lightning Experience
- Find answers in Help & Training

Getting your organization ready for users

- Set up the company profile
- Configure the user interface Set up activities and calendars
- Configure search settings
- Set up Chatter
- Enable mobile access with Salesforce1

Setting up and managing users

- Manage user profiles
- Create and manage users
- Troubleshoot user login issues
- Understand SalesforceA capabilities Set up Chatter Free Users and Invites

Security and data access

- Restrict logins Determine object access Set up record access
- Manage record access with the role hierarchy
- Deal with record access exceptions
- Control access to events
- Manage field-level security

Reports and dashboards

- Run and modify reports
- Create new reports with the report builder
- Filter reports
- Summarize report data with formulas and visual summaries
- Print, export, and email reports
- Build dashboards

Managing data

- Import new records using import wizards
- Update existing records with the data loader
- Keep records up to date with Data.com
- Mass transfer records between users
- Back up data with a weekly export Mass delete records

Customization: Fields

- Administer standard fields Create new custom fields
- Create selection fields: picklists and lookups
- Create formula fields
- Work with page layouts
- Work with record types and business processes
- Maintain data quality

Automation

- Email Templates
- Set up workflow rules and Process Builder
- Automate leads and cases

Managing the support process*

**For virtual classroom attendees, this content is delivered as an online module.*

- Automate the support process
- Understand the Salesforce Console
- Enable collaboration in the Service Cloud
- Analyze support data with reports and dashboards



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