

**Introduction to Salesforce System Administration**

**Course Number:** SF-100  
**Duration:** 3 days

**Overview**

This course, designed for new Salesforce® system administrators, teaches attendees everything they need to get started with Salesforce from setting up and managing users to creating insightful Reports and Dashboards. This course sets the stage for the next class [Advanced Salesforce System Administration](file:////training/salesforce-system-administration-advanced).

**Note:** This Salesforce class can be taught using the Classic User Interface or the Lightning Interface.

**Prerequisites**

All students should have a working knowledge of Excel and be proficient using a browser. No other prerequisites are required.

**Materials**

All students will receive comprehensive courseware.

**Software Needed on Each Student PC**

Salesforce is web-based and attendees only need an Internet connection and modern web browser for training. Salesforce recommends Chrome.

**Objectives**

* Navigate in Salesforce
* Use help and training
* Understand Salesforce terminology
* Understand the Salesforce data model and object schema
* Configure global settings – company profile, UI, calendar, and activity settings
* Demonstrate login troubleshooting
* Restrict logins
* Configure profiles
* Configure new users
* Understand object access
* Understand record access
* Understand role hierarchy
* Configure sharing rules
* Manage field-level security
* Create and configure a data access model
* Configure custom fields and understand field level security
* Create and configure custom objects and custom fields
* Maintain data integrity
* Understand page layouts, record types, and business processes
* Import/export data
* Create reports and dashboards
* Use Salesforce automation
* Understand Chatter
* Understand Salesforce Mobile

**Outline**

* Introduction
* Navigating in Salesforce
  + Logging into Salesforce
  + Using search
  + Parent-child object relationships
  + Configuring personal settings
  + Understanding apps and tabs
  + Using the schema builder
* Understand and Configure Global Settings
  + Company profile
  + UI
  + Calendar
  + Chatter
  + Setting up activities
  + Using list views
* Setting Up New Users
  + Managing users
  + Managing profiles
  + Managing licenses
  + Understanding login security
  + Troubleshooting login issues
* Security and Data Access
  + Setting object access
  + Setting record access
  + Creating a role hierarchy
  + Record access exceptions
  + Managing field level security
  + Design and configure a data access model
* Standard and Custom Object Customizations
  + Customize standard objects and fields
  + Creating custom objects and custom fields
  + Creating formula fields
  + Page layouts
  + Record types
  + Business processes
  + Design and configure a business scenario
* Maintaining Data Integrity
  + Required fields
  + Matching and duplicate rules
  + Validation rules
  + History tracking
* Data importing and Exporting
  + Import using the data import wizard
  + Import using dataloader.io
* Reports and Dashboards
  + Folders and security
  + Create reports using standard report types
  + Create reports using custom report types
  + Create dashboards
* Emailing from Salesforce
  + Sending emails with tracking code
  + Mass emailing
  + Workflow
  + Process Builder
* Salesforce Automation
  + Workflow
  + Process Builder
* Chatter
  + Understand Chatter
  + Understand use cases for Chatter
  + Configure Chatter invites
* Salesforce Mobile
  + Understand the capabilities
  + Know how to configure
  + Understand SalesforceA
  + Use Quick Actions
* Conclusion