

**Comprehensive Salesforce System Administration**

**Course Number:** SF-104  
**Duration:** 5 days

**Overview**

This comprehensive Salesforce® training is designed for new Salesforce systems administrators. The course first teaches attendees about the Salesforce structure and terminology, as well as how to set up and manage users, login security, troubleshooting, object and record access, and more. Students then take their skills to the next level with essential system administrator skills, including customizing Salesforce, creating custom objects and report types, using sandboxes, and leveraging all the automation tools in Salesforce. The course includes a final project giving students a real-world design and customization scenario.

**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**

* Learn to navigate in Salesforce
* Understand 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
* Be able to 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
* Understand and configure object relationships
* Understand and use lookup and master-detail fields
* Understand and use rollup summary fields
* Create Custom Report Types
* Use Custom Summary Formulas and Bucket Fields
* Create Workflows
* Create Processes
* Create Flows
* Create Queues, Assignment Rules, Auto-Response Rules, Escalation Rules
* Configure Web to Case and Email to Case
* Configure and Customize a full business scenario
* Understand Sandboxes
* Understand metadata and Change Sets
* Use the AppExchange
* Know when to code
* Be prepared for the System Admin certification exam

**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
* Salesforce Automation
  + Workflow
  + Process Builder
  + Flows
* Chatter
  + Understand Chatter
  + Understand use cases for Chatter
  + Configure Chatter invites
* Salesforce Mobile
  + Understand the capabilities
  + Know how to configure
  + Understand Salesforce
  + Use Quick Actions
* Object Relationships
  + Recognizing the need to create a custom object
  + Lookup or master-detail?
  + Rollup summary fields
* Advanced Reporting
  + Custom Report Types
  + Custom Summary Formulas
  + Bucket Fields
* Support Processes
  + Queues
  + Assignment Rules
  + Auto-Response Rules
  + Escalation Rules
  + Web to Case
  + Email to Case
  + Support Settings
* Sandboxes
  + Types of Sandboxes
  + Creating and Refreshing Sandboxes
  + Metadata vs. Data
  + Change Sets
* Using the AppExchange
  + Using the AppExchange
  + How to assess apps
  + Unmanaged and Managed Apps
* Know When to Code
  + Understanding declarative limits
  + Evaluate customization priorities
  + Typical coding scenarios
* Final Project
  + Design, configure, and customize a business scenario in Salesforce
  + Review student solutions
* System Administrator Certification Discussion
  + Requirements
  + Exam Resources
  + Preparation
* Conclusion