



## Salesforce Administrator ADM (201)

### Module 1

Time: 3hr

#### Set up Organization for Users

Set up the company profile

Configure the user interface

Set up activities and calendars

Configure search settings

### Module 2. Time: 3hr

#### Users Management

Manage user profiles

Create and manage users

Troubleshoot user login issues



**Module 3.**

Time: 10hr

**Customization: Objects/Fields (ADM 201)**

Standard and Custom Object

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

**Module 4.**

Time: 8hr

**Security and Data Access (ADM 201)**

Restrict logins

Determine object access

Manage record access with the role hierarchy

Deal with record access exceptions

Manage field-level security

**Module 5.**

Time: 3hr

**Managing Data (ADM 201)**

Import new records using import wizards

Update existing records with the data loader



B - 33, 1st Floor, Near Laxmi Nagar  
Metro Pillor-43 Delhi - 110092  
Contact#:9311512927, 8766377390  
[info@stucorner.com](mailto:info@stucorner.com)  
[info@sharpencloud.com](mailto:info@sharpencloud.com)

Mass transfer records between users  
Back up data with a weekly export  
Mass delete records

**Module 6.**

Time: 4hr

**Reports and Dashboards (ADM 201)**

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

**Module 7.**

Time: 12hr

**Automation (ADM 201)**

Manage email administration  
Set up workflow rules  
Validation Rule  
Automate leads and cases  
Assignment Rule  
Approval Process



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**Module 8.**

Time: 6hr

**Managing the Support Process (ADM 201)**

Automate the support process

Understand the Service Cloud console

Analyze support data with reports and dashboards

**Module 9.**

Time: 6hr

**Lightning and Mobile Components of Salesforce**

Introduction to Salesforce1

Use case of appropriate Global and Object specific actions

Action Layouts for Salesforce1

Introduction to Lightning Process Builder

Deployment Considerations



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