ADMINISTRATION ESSENTIALS FOR NEW ADMINS (OVERVIEW)

Exercise Guide

SALESFORCE · UNIVERSITY ·

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Intro: Log In

Goal:

Log in to AW Computing's Salesforce org to get started with your new job!

Tasks:

1. Navigate to the Salesforce login page.
2. Log in with your username and password.
3. Upon logging in, you will be prompted to change your password. Please use the password provided by your instructor, or choose a password that you will remember.

Time:

5 minutes

Instructions:

1. Navigate to the Salesforce login page.
   A. Enter `www.salesforce.com/login` into your browser's address bar.
   B. Press **ENTER**.
2. Log in with your username and password.
   A. Enter your username and password.
      i. User Name: `admin@aw#####.com`
      ii. Password: `password1`
   B. Click **Log in to Salesforce**.
3. Upon logging in, you will be prompted to change your password. Please use the password provided by your instructor, or choose a password that you will remember.

Intro: Edit Your Chatter Profile

Goal:

Update your profile by entering your personal information.

Tasks:

1. Access your Chatter profile.
2. Edit your profile to add your own email address, name, experience and skills.
3. Turn off Chatter email notifications.

Time:

5 minutes

Instructions:

1. Access your Chatter profile.
   A. Click **Admin User**.
   B. Click **My Profile**.
2. Edit your profile to add your own email address, name, experience and skills.
   A. Click the **pencil** icon next to Contact.
   B. In the Email field, change the information to your own email address.
   C. Click the **About** tab.
   D. Edit the First Name and Last Name fields to reflect your own name.
   E. In the About Me field, add information about your experience and skills.
   F. Click **Save All**.
3. Turn off Chatter email notifications.
   A. Click **Your Name | My Settings | Chatter | Email Notifications**.
   B. Clear the **Receive emails** checkbox.
   C. Click **Save**.

1-1: Tour of the Application

Goal:

Take a tour of the application, reviewing the main objects in Salesforce that you just covered.

Tasks:

1. Tour the Home page and sidebar.
2. Tour tabs and apps.
3. Tour records.

Time:

5 minutes

Suggested Steps:

1. Tour the Home page and sidebar.
   A. Click the **Home** tab. Here you will see your Chatter updates and those of records you follow. You can also check status updates here for people you are following.
   B. Scroll down the Home page. Here you can view a dashboard snapshot, check tasks, and view upcoming events on your calendar.
   C. Scroll back up to the top of the Home page. On the left, you will see the sidebar, which gives you access to messages and links, and one-click access to up to ten of the most recent items you have looked at.

2. Tour tabs and apps.
   A. Look at the other tabs to the right of the Home tab. These give you access to more Chatter features, reports and dashboards, and the objects, such as Accounts and Opportunities, that you have learned about.
   B. Click the **Force.com App Menu** (button displaying Sales in top-right corner).
   C. Select **Recruiting**. (If you are prompted to watch a video, click **Skip**, **Skip**, and then the **X** button to close.) Notice how the tabs change. This is a custom app containing custom tabs and objects used by Ling Wu's recruiting team to track applicants applying for open positions at AW Computing.
   D. Click the **Force.com App Menu** (button now displaying Recruiting in top-right corner).
   E. Select **Sales**. Notice how the tabs change back again.
   F. Click the **Accounts** tab. The first thing you will see on an object tab like Accounts is a list of recent records you have viewed.
   G. In the top-right corner of the Recent Accounts section, click the **picklist**. You will notice that you can also select to view recently created or recently modified records.

H. At the top of the Accounts home page, click the **View** picklist. You will see a selection of filtered lists, called views.
I. Select **All Accounts**, and click **Go!** You will see a view of accounts. To make it easier to find a particular record in a view, you can click on a column header to sort the list, or click one of the letters above to display records starting with that letter.

3. Tour records.

A. In the Account Name column, click **ABC Labs**.
B. Scroll down the account detail page until you see the related lists. These related lists display the records related to the account.
C. Scroll back up to the top of the detail page. You will see links to the related lists, making it even easier to access these related records.
D. Hover your cursor over the **Contacts** link to see the related list without scrolling.
E. In the Contact Name column of the related list, click **Arnold Adams**. You will now see the contact detail page.
F. In the Account Name lookup field, hover over **ABC Labs**. You will see a pop-up summary of the account that this contact is related to.
G. In the Account Name lookup field, click **ABC Labs**. This takes you back to the account record.
H. In the Recent Items section of the sidebar, hover over **ABC Labs**. You will again see a pop-up summary of the account.
I. Click the **Home** tab.

1-2: Treasure Hunt

Goal:

Answer the questions using the navigation skills that were just demonstrated:

1. How many accounts begin with the letter “A”?
2. How many accounts begin with the letter “U”?
3. Where did Allison Wheeler get her business degree?
4. What did Ling Wu do before she started at AW Computing?
5. How many members are in the “Beat Targas!” group?
6. What department/division are they in?
7. How many people are following you in Chatter?
8. How many people, records, and files are you following?
9. Do you own any files that have been uploaded into the org?
10. Have any files been shared with you? How many?

Time:

5 minutes

Suggested Steps to Answer Questions:

1. How many accounts begin with the letter “A”?

   A. Click the **Accounts** tab.
   B. From the View picklist, select **All Accounts** if not already selected.
   C. Click **Go!**
   D. Check to make sure the records are sorted by Account Name by looking for an arrow in the Account Name column header. If you do not see an arrow, click **Account Name** in the column header to sort by this field.
   E. In the row of letters above the list, click **A**.
   F. Count the number of records you see in the list to get your answer.

2. How many accounts begin with the letter “U”?

   A. In the row of letters above the list, click **U**.
   B. Count the number of records you see in the list to get your answer.

3. Where did Allison Wheeler get her business degree?

   A. Click the **Chatter** tab.
   B. On the left, click **People**.

C. In the Type a Name... search box, enter `Allison`
D. In the results section, click **Wheeler, Allison**.
E. Click on the **Overview** tab, and in the About Me section, you will see where Allison studied.

4. What did Ling Wu do before she started at AW Computing?

A. In the Global Search box at the top of the screen, enter `Ling Wu` and click **Search**. (If you see a yellow popup, close it.)
B. In the People results section, click **Ling Wu**.
C. Click on the **Overview** tab, and in the About Me section, look at Ling's experience to find out where she worked before.

5. How many members are in the "Beat Targas!" group?

A. Click the **Chatter** tab.
B. On the left, click **Groups**.
C. In the Type a Group Name... search box, enter `Targas`
D. In the results section, you will see how many members the Beat Targas! group has.

6. What department/division are they in?

A. In the results section, click **Beat Targas!** (If you see a yellow popup, close it.)
B. On the right, under Members, hover over the **Chatter pictures** to see what department or division each member is in.

7. How many people are following you in Chatter?

A. Click **Your Name | My Profile**.
B. Click the **Overview** tab.
C. On the right, in the Followers section, look at the number in parentheses in the Show All link to see how many followers you have.

8. How many people, objects, and files are you following?

A. On the right, in the Following section, look at the number in parentheses in the Show All link to see how many items you are following.
B. Click the **Show All** link.
C. From the Filter By picklist, select **Account** to see which accounts you are following.
D. From the Filter By picklist, select **Contact** to see which contacts you are following.
E. From the Filter By picklist, select **Opportunity** to see which opportunities you are following.
F. Click **Done**.

9. Do you own any files that have been uploaded into the org?

Still in the Overview tab, look at the Files Owned section.

10. Have any files been shared with you? How many?

A. Click the **Chatter** tab.
B. On the left, click **Files**.
C. Click **Files Shared with Me** to answer the questions.

1-3: Enable Lightning Experience

Goal:

Enable Lightning Experience and recommended features for your organization.

Tasks:

1. Enable Lightning Experience and recommended features.

Time:

5 minutes

Instructions:

1. Enable Lightning Experience and recommended features.
   A. Click **Setup**.
   B. Click **Lightning Experience**.
   C. Slide the button to **Enabled** for the following:
      i. Account Insights
      ii. Social Accounts, Contacts, and Leads
      iii. Lightning Experience

1-4: Help & Training Portal

Goal:

Use the Help & Training Portal to locate documentation and online training.

Tasks:

1. Locate documentation on how to customize user interface settings.
2. Locate online training.

Time:

5 minutes

Instructions:

1. Locate documentation on how to customize user interface settings.
   A. Click the **Help & Training** link.
   B. In the Help search box, enter `user interface settings` and click the **search** button.
   C. Click the Help topic **Customizing User Interface Settings**.
2. Locate online training.
   A. Click the **Home** link below the Help search box.
   B. Scroll down to the Training gadget.
   C. Review the online titles listed.
   D. Close the Help & Training window.