



Becoming a Salesforce Administrator

A training path for Nonprofit and Higher Ed Admins



Marc Baizman, Customer Success Evangelist

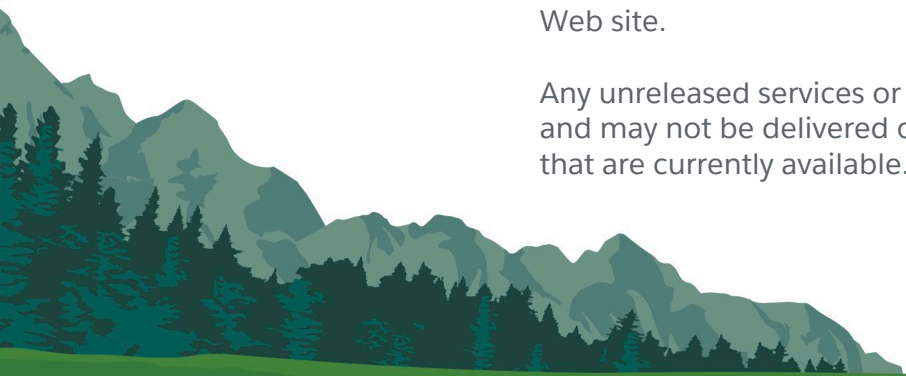
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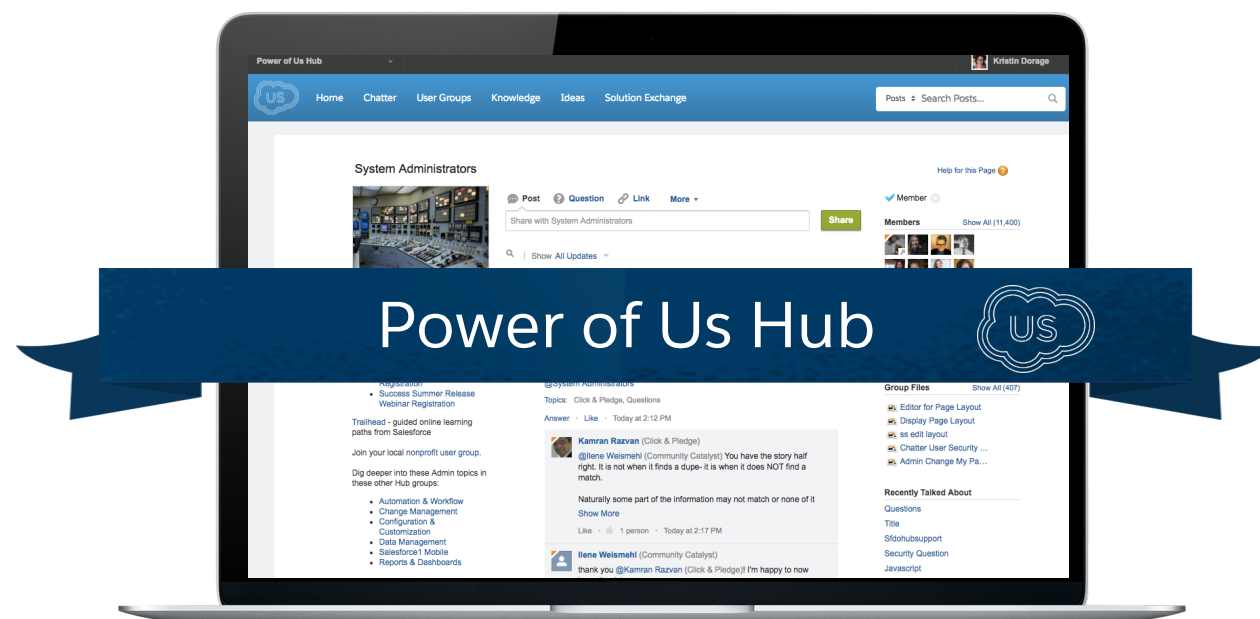
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Logistics

Questions, Answers and Staying in Touch

- How do you ask a question?
- Will this be recorded?
- Where can you get the presentation?
- Where can you go to get more information?



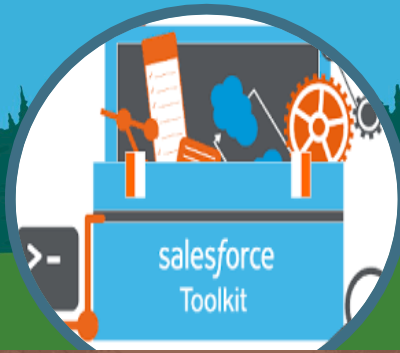
Join the System Administrators group in the Power of Us Hub!
<https://sfdc.co/sys-admin>

Objective for today:

Learn what you need to know to become a Nonprofit or Higher Education Salesforce Administrator and define your career as an Admin.



**Your Admin
Training Path**



**Your Admin
Toolkit**



**Your Career as a
Salesforce Admin**

Terry Cole, an Admin Trailblazer!

Missionary & Founder, Street Youth Ministry of Austin

What does an Admin Trailblazer do?

- Participates in the Power of Us Hub & Salesforce Success communities
- Actively gives back to the community
- Learns Salesforce on the job (largely self-taught)
- Teaches others about Salesforce
- Shares knowledge at events such as Dreamforce and with local User Group



You can be an
Admin
Trailblazer too!



Your Admin Training Path

Where to begin your Salesforce education



salesforce.org

Your Admin Training Path

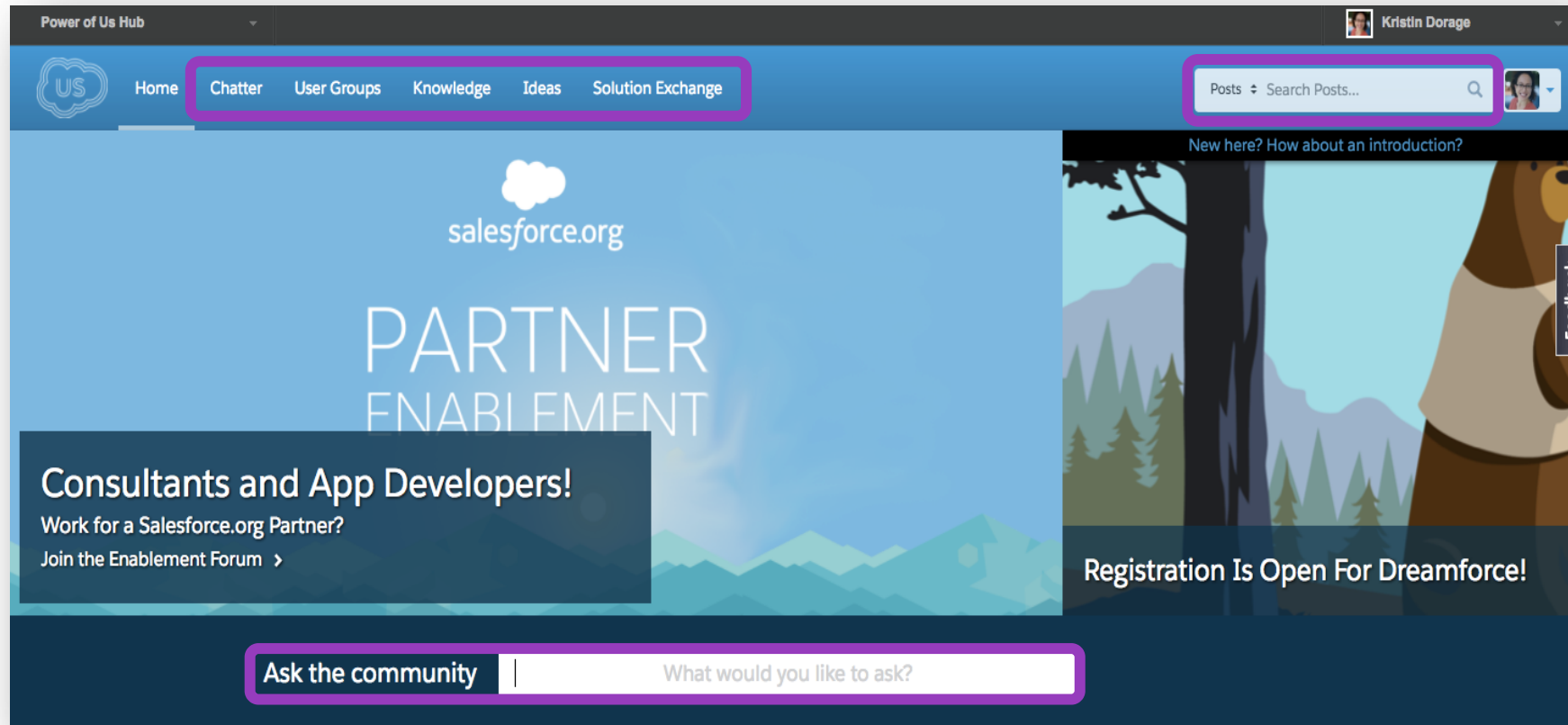
5 Steps to Becoming an Admin Trailblazer



Join the Community: The Power of Us Hub

With your Salesforce login, you have access to the Power of Us Hub

1. Join the Community





powerofus.force.com

Join the Community: Participation Tips

Tips for getting started with the Hub

1. Join the Community

- **Check out:** [Getting Started in the Power of Us Hub](#)
- **Join** these Chatter groups:
 - [Getting Started](#)
 - [System Administrators](#)
 - [About the Hub](#)
- **Read** your Chatter feed regularly, like a newspaper!
- **Explore** what people are talking about and **join** the conversation!

 **Berett Garbus** (KEEP AMERICA BEAUTIFUL (Main Org)) asked a question. 

How can I change the FieldLabel title?


How can I change the FieldLabel title on a preexisting field?

@Nonprofit Success Pack
@Fundraising
@Getting Started with Salesforce
@System Administrators

Topics: Questions


Answer · Like · July 7, 2017 at 10:02 AM

Show All Answers

 **Bob Bailey** (501cTECH / TechImpact)

@Berett Garbus (KEEP AMERICA BEAUTIFUL (Main Org)), Don't do it unless you have a really compelling reason. It can cause you or your successor TONS of problems down the road a bit.

Like · 1 person · July 7, 2017 at 3:14 PM



 **Jeff Dixon** (Queen's School of Business)

@Berett Garbus (KEEP AMERICA BEAUTIFUL (Main Org)) I would echo @Bob Bailey (501cTECH / TechImpact)'s advice. Having learned the hard way, I stick to three principles:

1) Wherever possible, if you're thinking of using a custom field to do the same thing that a standard field would do, resist that temptation

[Show More](#)

Like · 1 person · Today at 6:33 AM

 **John Melleky** (CEC/ Seabee Historical Foundation) asked a question. 

New to Salesforce - need assistance on setups


We are new to Salesforce and trying to have set ups for Campaigns, funds, and appeals, obtaining one mailing list for individuals and corporations, and processes and procedures for gift recordings. Any help would be appreciated.

@Fundraising
@Getting Started with Salesforce
@Nonprofit Success Pack

Topics: Questions

Answer · Like · July 7, 2017 at 8:45 AM

Adam Vatterott (Regional Arts Commission of St. Louis) likes this.

 **Samantha Shain** (Common Market Philadelphia Inc.)

h/t to @Michael Kolodner (Spark Program) for showing me this doc but I think this is enormously helpful! https://static1.squarespace.com/static/55eb512be4b049db23dd1ffa/t/58b8ace92e69cfa8e4f73ef6/1488497900246/The+New+Administrator+Learning+Journey_Collie_r_Feb17.pdf Also, find out if there is a Nonprofit User Group near you! The one in Philadelphia is a source of consistent learning, fun and commiseration for me 😊

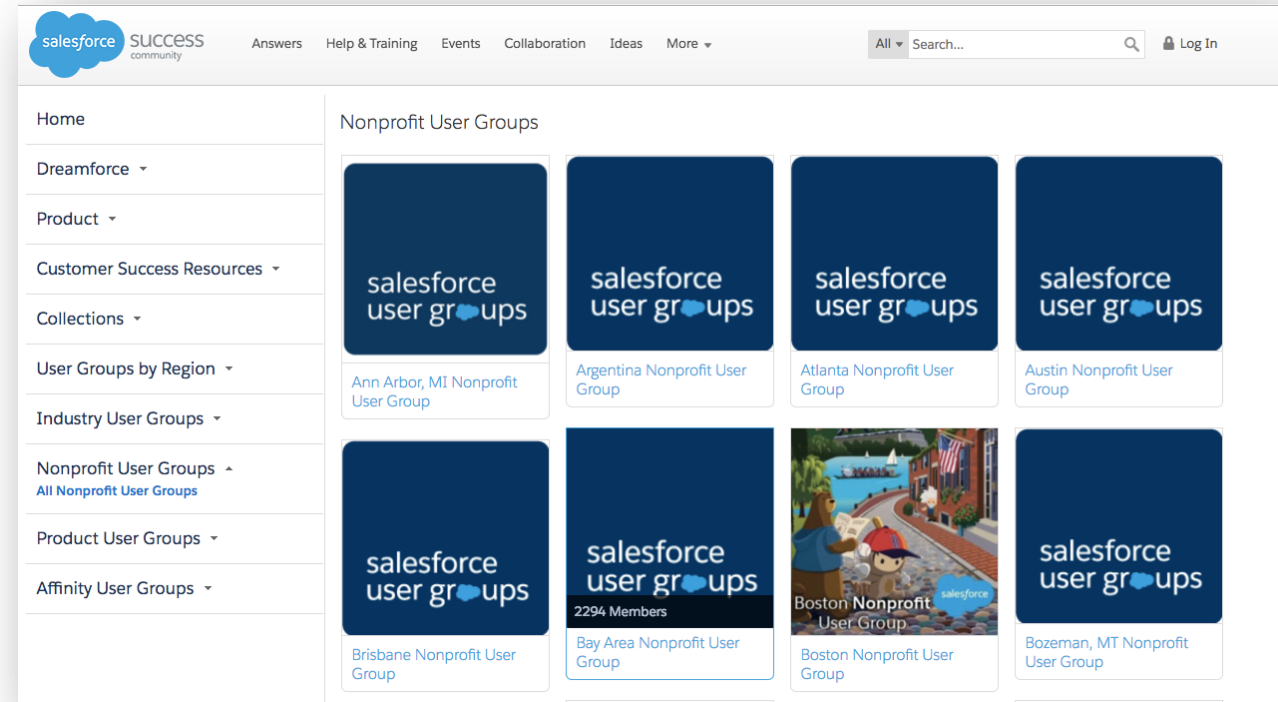
Like · July 7, 2017 at 1:35 PM

Write an answer...

Join the Community: Your Local User Group and the Success Community

1. Join the Community

- Join your local Nonprofit or Higher Ed **User Group**
- Join the Success Community




Create a free Developer Org

A great way to get hands-on practice

- **Sign up** for a Dev Org:
https://sfdc.co/trailhead_devorg
- **Tip:** Use a personal email for your Dev Org so it's not tied to your job!

2. Create a Dev Org



Earn Trailhead badges!
Create a Developer Org to do hands-on learning

salesforce trailhead

Sign Up for Trailhead

This will create a free Developer Edition which you'll use to take trailhead challenges

Name
First Last

Email
Your email address

Role
Developer

Company
Company Name

Country
United States

Postal Code

Username
Ex: name@trailhead.com

☐ By registering, you confirm you have read and agree to the [Terms of Use](#) and the [Master Subscription Agreement](#) and agree that my data is subject to the [Privacy Statement](#), including use for marketing purposes.

Sign me up >

Hit the Trails with Trailhead!

A fun, *free* way to learn Salesforce - <https://trailhead.salesforce.com/>

3. Hit the
Trailhead Trails



**THE FUN WAY TO
LEARN SALESFORCE**

START LEARNING FOR FREE



*Get Ready for 4 Phases of Learning – All You Need to Know
to be a Successful Admin!*



salesforce.org

Hit the Trails: Start with the CRM Basics

Phase 1

3. Hit the
Trailhead Trails



CRM Basics

Learn CRM Essentials

- CRM Basics (30 min)
- Accounts & Contacts (35 min)
- Leads & Opportunities (30 min)
- Data Quality (60 min)
- Reports & Dashboards (2hr 40 min)
- Chatter Basics (80 min)



Administration Basics

Admin Beginner

- Salesforce Platform Basics (50 min)
- Data Modeling (45 min)
- Data Management (20 min)
- Lightning Experience Reports and Dashboards (2hr 15 min)



Lightning Basics

Make the Move to Lightning

- Lightning Experience Basics (55 min)
- Lightning Experience Features (80 min)

Hit the Trails: Salesforce.org App Basics

Phase 2

3. Hit the
Trailhead Trails



Nonprofit Success Pack

Manage Fundraising for
Nonprofits

- Fundraising Basics (40 min)
- Donation Management (2 hrs 55 min)



Volunteers for Salesforce

Manage Volunteers for
Nonprofits

- V4S Basics (30 min)
- Volunteer Registration (1hr 50 min)
- Website Integration (1hr 10 min)
- Volunteer Management (45 min)



Higher Education Data Architecture

Manage Your Higher Ed Data
with HEDA

- HEDA Basics (35 min)
- HEDA Data Management (1hr 35 min)
- HEDA Reports (1hr 40 min)

Hit the Trails: Boost Productivity and Increase Value

3. Hit the Trailhead Trails

Phase 3



Mobile Access

- [Mobile Strategy Development](#) (1 hr 50 min)
- [Salesforce1 Mobile Customization](#) (1 hr 35 min)



Internal Collaboration

- [Lightning Experience Chatter Basics](#) (45 min)



Email Integration

- [Integrate Microsoft Email and Salesforce](#) (70 min)

Hit the Trails: Intermediate Trails

Phase 4

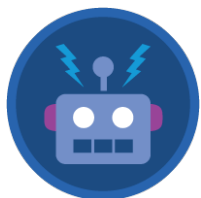
Security, Data Management and Automation



- Admin Intermediate Trail (11 hrs 20 min)



- Secure Identity and Access Management Trail (3 hrs)



- Automate Your Business Processes Trail (5 hrs 55 min)

Change Management



- Prepare for Salesforce Releases Trail (4 hrs)

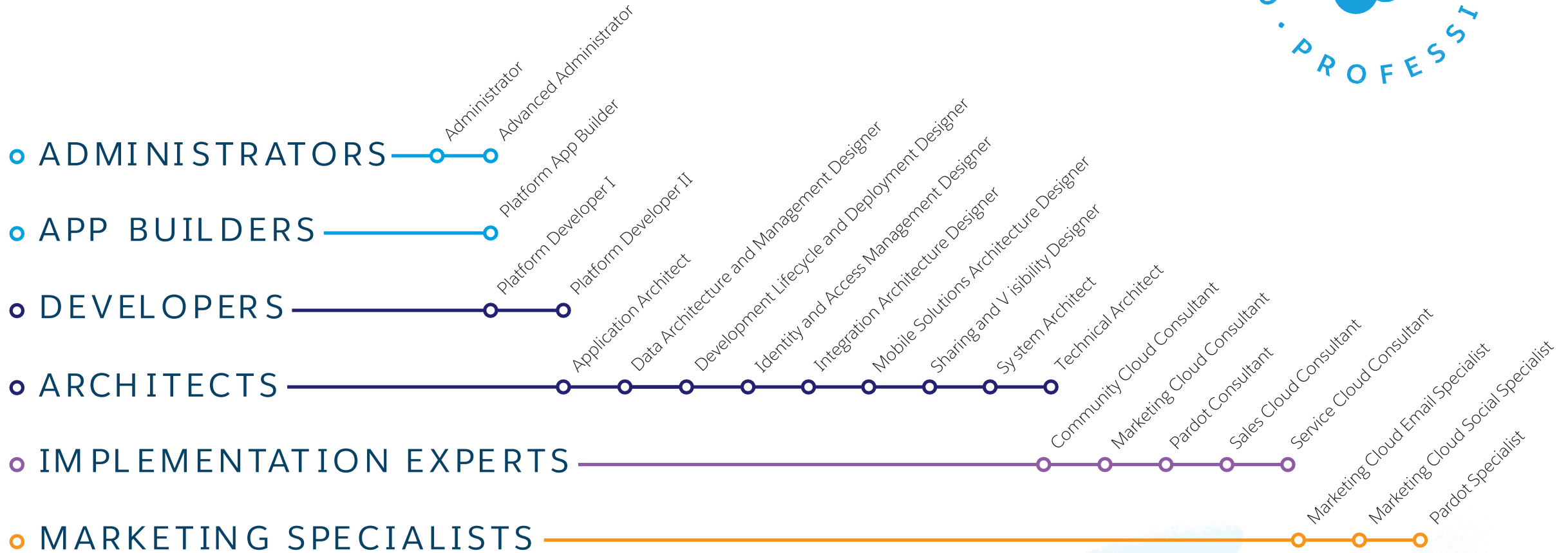


- Change Management Module (1 hr 15 min)

CERTIFICATION TRACKS

<http://certification.salesforce.com/home>

4. Choose a Certification



*Read: [Preparing for Salesforce Admin Certification for Nonprofits](#)

*Read: [Salesforce Training and Certification Options for .Org Customers](#)

4. Choose a
Certification

Consider Instructor-Led Training

50% discount for Salesforce.org customers

50%
off



Pros and Cons of Becoming Certified

4. Choose a Certification

<http://certification.salesforce.com/>



Pros

- It is the easiest way to validate yourself as a Salesforce professional.
- Communicates skill, expertise, and knowledge of the Salesforce platform.

Cons

- Exam costs money (but you do get a discount!)
- Certification is not necessary for being a great Admin.



salesforce.org

Study, study, study!

4. Choose a Certification

- [Girlforce Study Group](#) in the Hub
- [ADM 201 Study Group](#) in the Success Community



Grow your skills: Blogs, Webinars, and Events

Keep up to date on the latest from Salesforce and Salesforce.org

5. Grow Your Skills!

Blogs

- admin.salesforce.com
- adminhero.com
- salesforceben.com
- [MindShare](https://www.mindshare.com)

User Groups

- [Nonprofit User Groups](#)
- [Higher Ed User Groups](#)



Events and Webinars



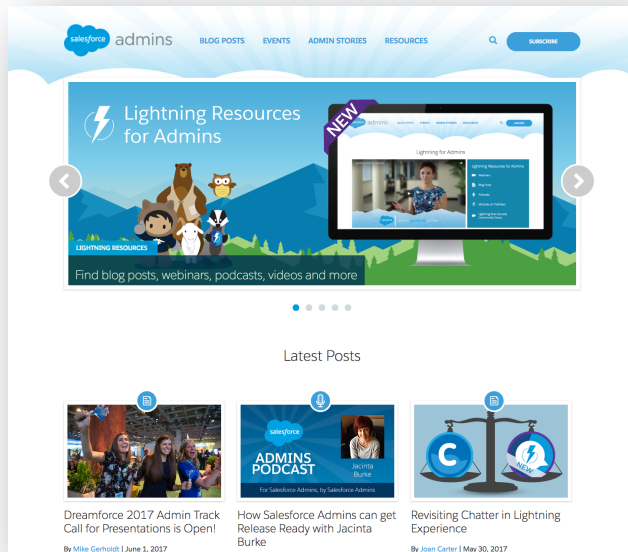
Release Webinars

- [Success: New Release Readiness](#)
- [HEDA: Release Announcements](#)
- [NPSP: New Release Announcements](#)

release announcements

Dreamforce

[November 6-9 in San Francisco](#)



Grow Your Skills: Help Others

5. Grow Your Skills!

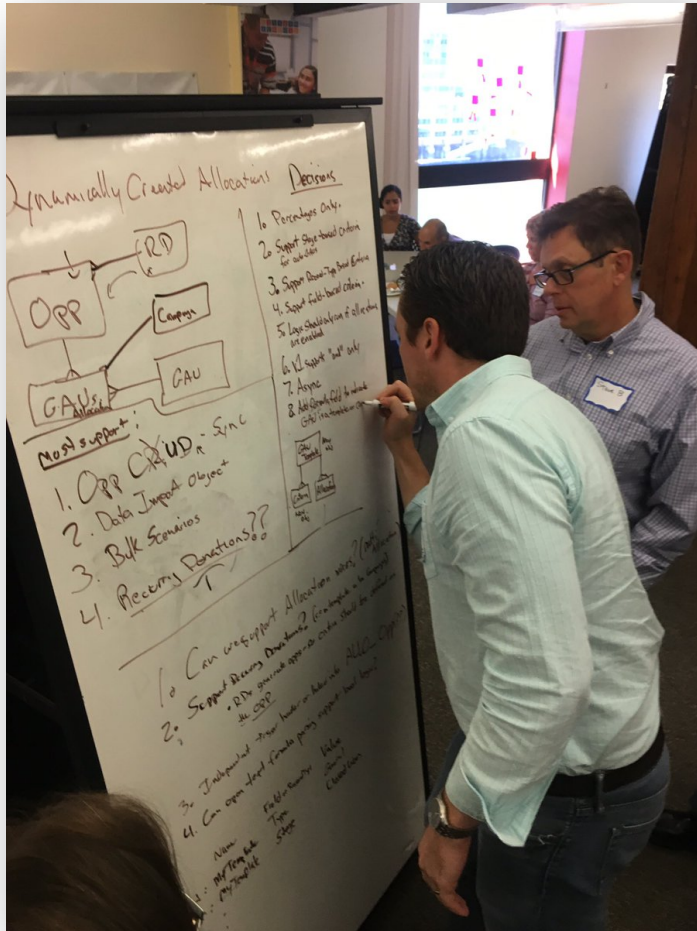


Photo credit: Tracy Kronzak



Photo credit: Liz Hafalia

Your Admin Training Path

5 Steps to Becoming an Admin Trailblazer

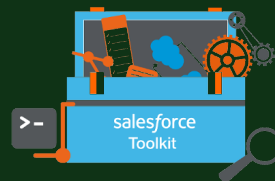


A wooden signpost with a horizontal beam and a vertical post. A dark brown rectangular sign is hanging from the beam, displaying the word 'DEMO' in white capital letters. The background is a stylized landscape with green grass, a line of dark green trees, and blue mountains under a bright blue sky with white clouds. A tree trunk is visible on the left side.

DEMO

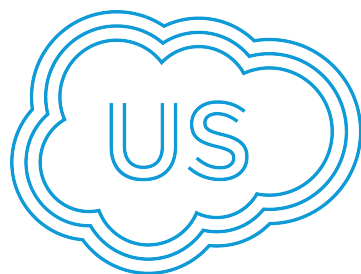
Sign up for Dev Org and
Certification exam

Your Admin Toolkit



How do I get help?

Start with the Hub!



the power of **US**
hub



Have a question and want to talk to a live expert? Or listen in on questions from users like you? Call the Hub Office Hours!



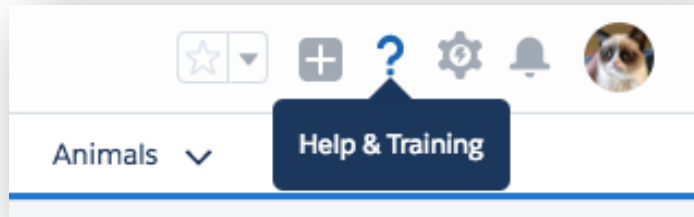
View full schedule:
http://bit.ly/hub_officehours



salesforce.org

The Hub didn't work! How do I get more help?

Contact Salesforce Tech Support!



[How to Log a Ticket with Salesforce Tech Support](#)

Case Description	
I need assistance with	<input type="text" value="General Salesforce Functionality"/>
Product Topics	<input type="text" value="Nonprofit & Higher Ed"/>
Subject	<input type="text"/> required!
Description	<div></div> required!

Is Salesforce down for Everyone or Just Me?

First stop = trust.salesforce.com



A screenshot of the Salesforce Trust & Status page. The page has a green header with the Salesforce logo and "Trust | Status". Below the header, there are tabs for "Status & Maintenance" and "Performance". The main content area is divided into two sections: "STATUS" and "MAINTENANCE". The "STATUS" section shows a grid of service status indicators, each with a green checkmark, indicating that all services are available. The "MAINTENANCE" section shows a calendar for June 2017, with a "List" button and a "Calendar" button. The calendar shows dates from 1 to 30, with some dates circled in blue.

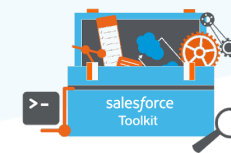
- System Status
- Security
- Compliance
- [Sign up for email alerts](#)




How Do I Extend Salesforce?

Use Apps from the AppExchange

<https://appexchange.salesforce.com/>



**apsona
for
salesforce**


Apsona for Salesforce

★★★★★ (249)

**LIGHTNING READY**

Salesforce Adoption Dashboards

★★★★★ (48) FREE

**Q** Field Trip

★★★★★ (129) FREE

**T** DemandTools - data quality powe...

★★★★★ (298)

**LIGHTNING READY**

Data Quality Analysis Dashboards

★★★★★ (30) FREE

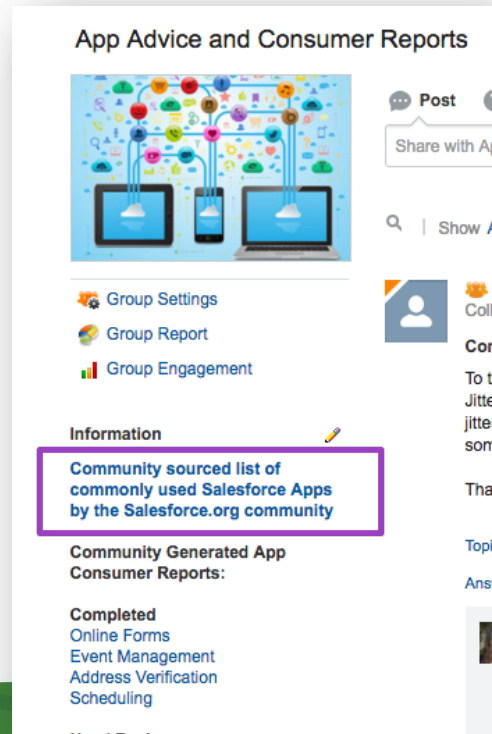
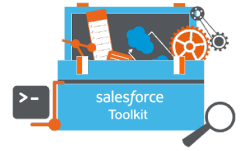
**OCTOPUS** Octopus

★★★★★ (29) FREE

How Do I Decide Which App to Choose?

Read community-sourced reviews of Apps

https://sfdc.co/apps_npos



App Comparison: Data Import Tools						
File Edit View Insert Format Data Tools Add-ons Help Last edit was made 8 days ago by Katie McFadden						
App	Name	CLICK TO UPDATE INFO	BASICS	Pricing Link	Pricing & Licenses	FEATURES
1						
2	Apex Data Loader	Update		N/A	Free and downloadable from SF	
3	apsona for salesforce	Update		Free	3 Free licenses for nonprofits with 10 users or less.	
4	DemandTools	Update		Free	Free license provided with NP documentation	

Pick a tool and stick with it!

Make Salesforce Administration Your Career!



salesforce.org

Make it a Career!

- **Network** – Attend user groups and events
- **Volunteer** – Help others!
- **Engage the Community** – Participate in the Hub!
- **Expand your Skills** – Get Salesforce certified!
- **Learn how others have done it** – Read and Ask!
 - [Trailblazer stories](#)
 - [Salesforce.org](#) blog about career [journeys](#)
 - Admin Hero Blog Series: “[So You Want My Job](#)”
 - Admin Hero Blog Post: “[5 Steps to Jumpstart Your Salesforce Career](#)”



Hard Skills: A Checklist

Data Model and Manipulation, Configuration, Data Security, Reporting, and Automation

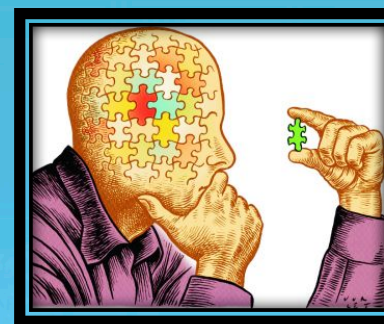
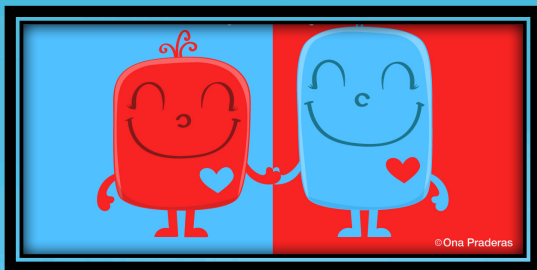
- ☐ Know the data model for commonly-used standard objects and all NPSP/HEDA objects
- ☐ Know how to optimize page layouts
- ☐ Be familiar with some type of bulk data loader tool and how to extract, modify, and load data in bulk
- ☐ Know how to add formula fields
- ☐ Know how to add custom fields to standard objects
- ☐ Know how to add custom objects (but never if a standard object can do the job!)
- ☐ Understand Profiles & Roles and how to set up these security features
- ☐ Know how to create and modify List Views
- ☐ Know all about reporting - making a report, customizing a report type, and scheduling reports
- ☐ Know how to set up dashboards and set permissions to view them
- ☐ Know process builder
- ☐ Know simple flows
- ☐ Know what general Salesforce limits are
- ☐ Know how to create and refresh sandboxes
- ☐ Be comfortable installing, configuring, and removing AppExchange apps
- ☐ Poke around every setting page of NPSP/HEDA and standard Salesforce. What is there? What does it do?



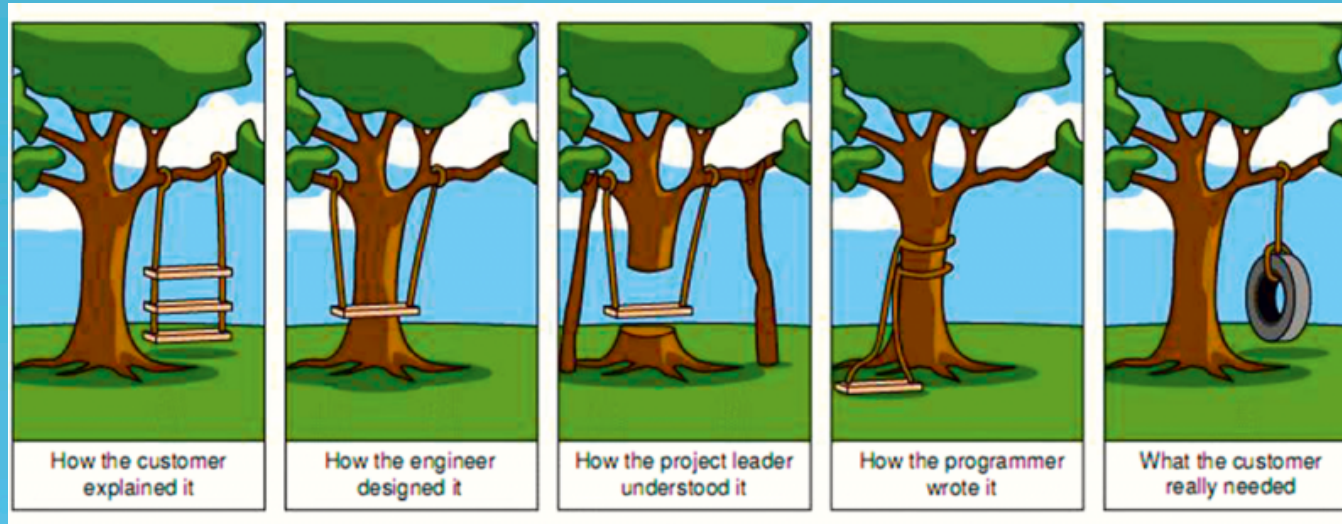
Move from Average Admin to Admin Trailblazer!

“Soft Skills” Make the Difference

- Empathy
- Communication (especially listening skills!)
- Critical Thinking



How Soft Skills Make the Difference



<http://www.projectcartoon.com/about/>

- Planning an implementation
- Understanding what end-users want
- Training end-users on new features
- Estimating time expenditures
- Documenting what you did
- Planning and prioritizing future enhancements

Admin Trailblazer Story

“One thing that [an Admin] needs to do is be able to see the ‘ripple effect’ and think through how making changes in one part of the Org affects everything else.”

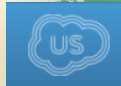
“Technical knowledge doesn’t matter if you don’t understand what the end-users want.”



Gordon Lee
Salesforce
Administrator, Common
Sense Media

Next Steps: Start your Admin Trailblazer journey today!

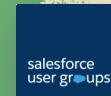
Join the **System Administrators** group in the **Power of Us Hub**




Bookmark resources from the Admin Toolkit in your web browser



Sign up for your local user group



 **Schedule time** for your own education



A stylized illustration of a wooden signpost in a forest. The signpost consists of a vertical wooden post and a horizontal wooden beam. A dark brown rectangular sign is hanging from the beam, displaying the text 'Q & A' in white. The background features a bright blue sky with large white clouds, green rolling hills, and a range of mountains in the distance. A tree is visible on the left side of the frame.

Q & A

Thank You

