



salesforce.org

# Becoming a Salesforce Administrator

A training path for Nonprofit and Higher Ed Admins



Marc Baizman, Customer Success Evangelist

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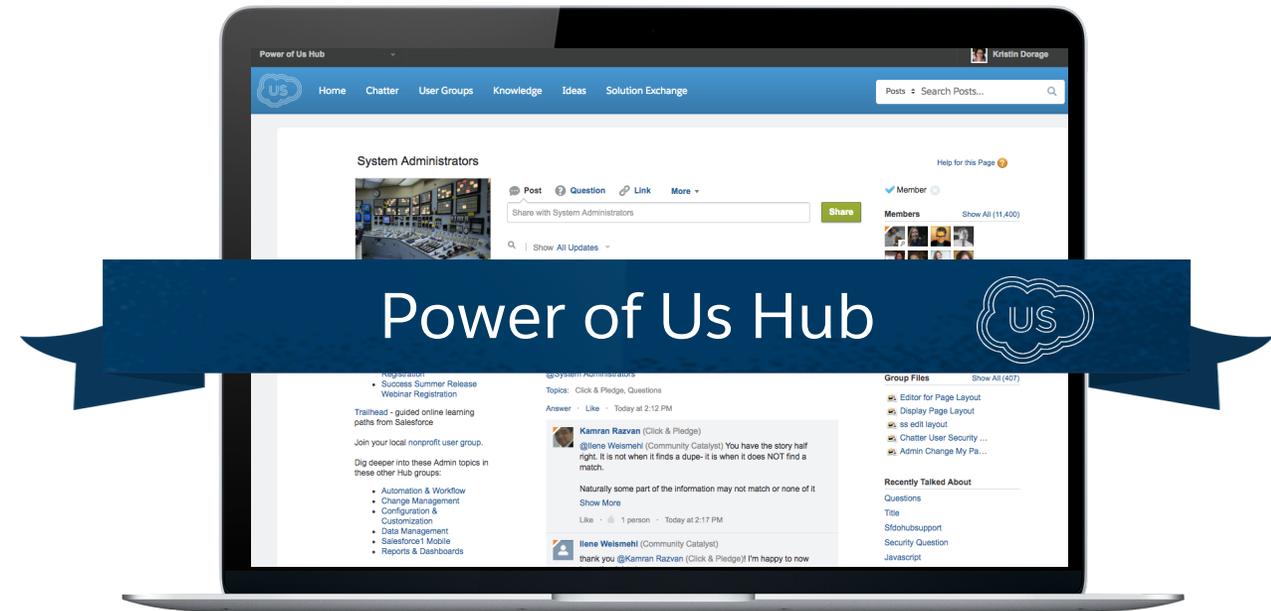
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# Logistics

## 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



# Your Admin Training Path

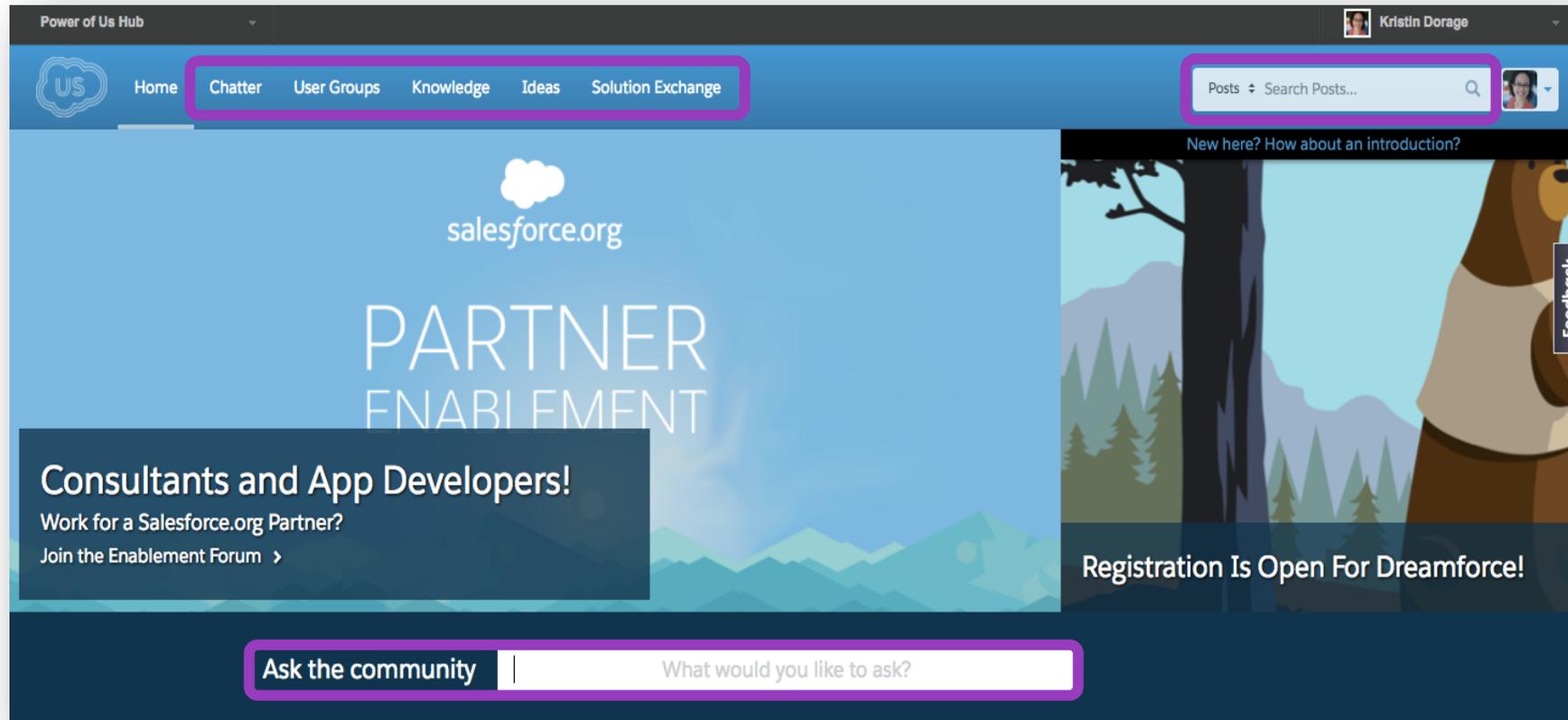
5 Steps to Becoming an Admin Trailblazer



# 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](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

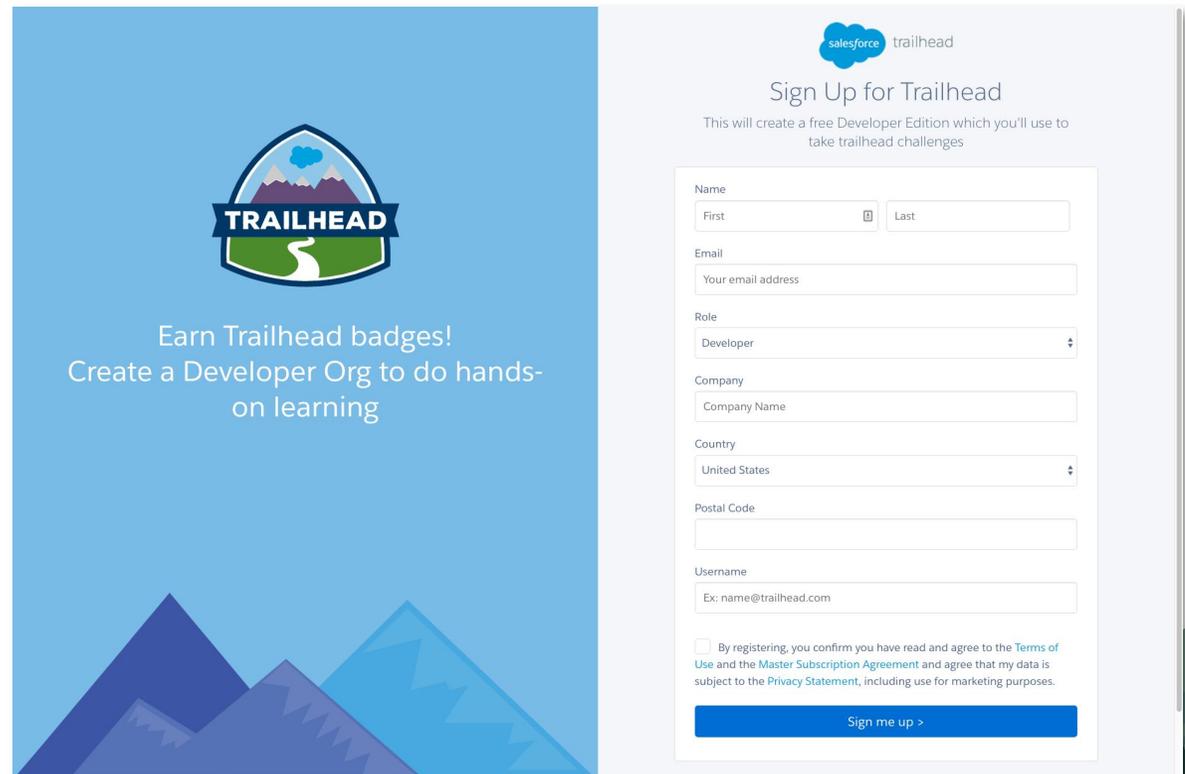
The screenshot displays the Salesforce Success Community interface. The top navigation bar includes the Salesforce logo, 'SUCCESS community', and links for 'Answers', 'Help & Training', 'Events', 'Collaboration', 'Ideas', and 'More'. A search bar and a 'Log In' button are also present. The left sidebar contains a menu with categories: Home, Dreamforce, Product, Customer Success Resources, Collections, User Groups by Region, Industry User Groups, Nonprofit User Groups (with a sub-link for 'All Nonprofit User Groups'), Product User Groups, and Affinity User Groups. The main content area is titled 'Nonprofit User Groups' and features a grid of eight user group cards. Each card has a dark blue header with the 'salesforce user groups' logo. The cards represent: Ann Arbor, MI Nonprofit User Group; Argentina Nonprofit User Group; Atlanta Nonprofit User Group; Austin Nonprofit User Group; Brisbane Nonprofit User Group; Bay Area Nonprofit User Group (with 2294 members); Boston Nonprofit User Group (with a small image of a person in a red hat); and Bozeman, MT Nonprofit User Group.

# Create a free Developer Org

A great way to get hands-on practice

- **Sign up** for a Dev Org:  
[https://sfdc.co/trailhead\\_devorg](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



**TRAILHEAD**

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!*

# 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

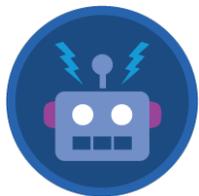
## Security, Data Management and Automation



- 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)

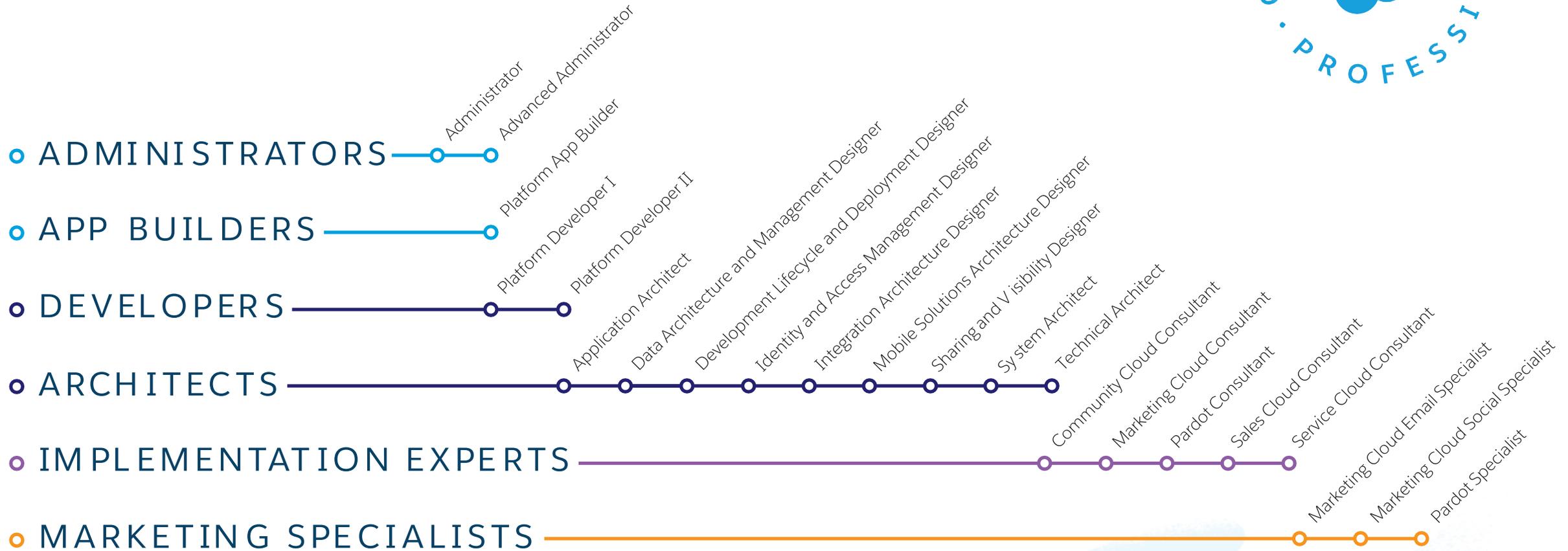


- Change Management Module (1 hr 15 min)

# 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.

# Study, study, study!

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

4. Choose a Certification



# 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](http://admin.salesforce.com)
- [adminhero.com](http://adminhero.com)
- [salesforceben.com](http://salesforceben.com)
- [MindShare](http://MindShare)

## 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!

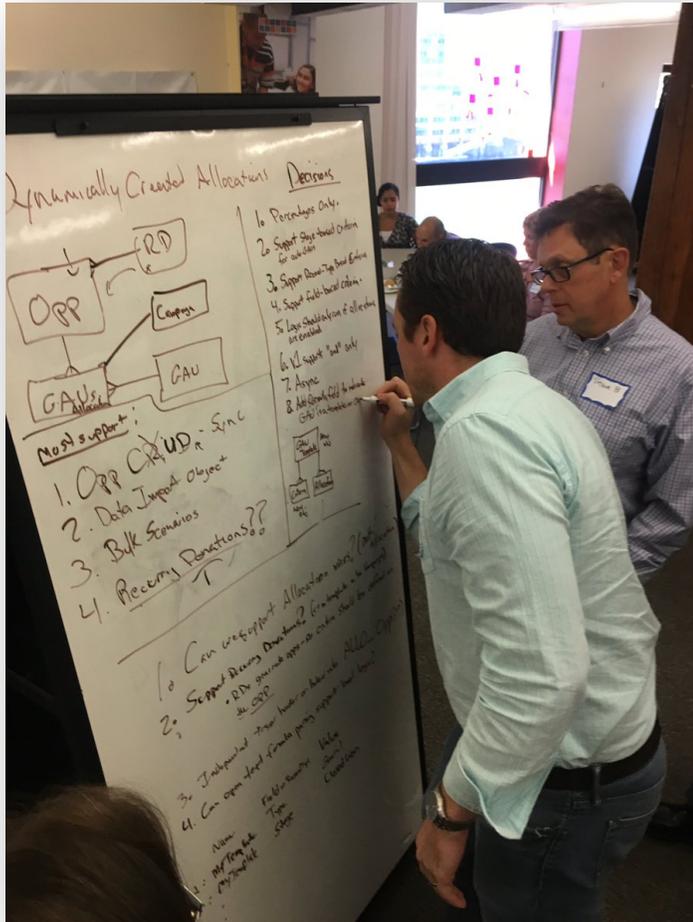


Photo credit: Tracy Kronzak



Photo credit: Liz Hafalia

# Your Admin Training Path

5 Steps to Becoming an Admin Trailblazer





**DEMO**

Sign up for Dev Org and  
Certification exam

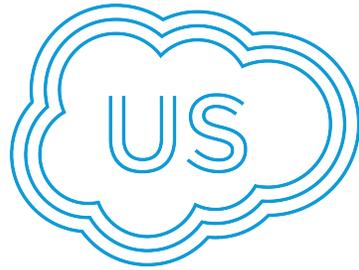


# Your Admin Toolkit



# 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!



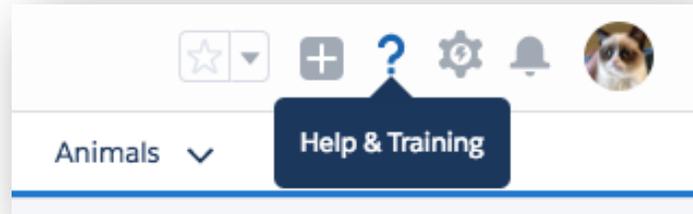
View full schedule:

[http://bit.ly/hub\\_officehours](http://bit.ly/hub_officehours)



# 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 &amp; Higher Ed"/>        |
| Subject                | <input type="text"/><br><small>required!</small>              |
| Description            | <input type="text"/><br><small>required!</small>              |

# Is Salesforce down for Everyone or Just Me?

First stop = [trust.salesforce.com](https://trust.salesforce.com)



A screenshot of the Salesforce Trust &amp; Status page. The page has a green header with the Salesforce logo and "Trust | Status". Below the header, there are tabs for "Status &amp; Maintenance" and "Performance". The main content area is divided into two sections: "STATUS" and "MAINTENANCE". The "STATUS" section has a grid of 100 status indicators, each with a green checkmark and a label (e.g., NA2, NA3, NA4, NA5, NA6, NA7, NA8, NA13, NA18, NA19, NA20, NA21, NA22, NA23, NA24, NA26, NA28, NA29, NA30, NA31, NA32, NA33, NA34, NA35, NA37, NA38, NA39, NA40, NA41, NA42, NA43, NA44, NA45, NA46, NA47, NA48, NA49, NA50, NA51, NA52, NA54, NA55, NA56, NA57, NA58, NA63, NA74, NA78, NA88, CS1, CS2, CS3, CS4, CS7, CS8, CS9, CS10, CS11, CS12, CS13, CS14, CS15, CS16, CS17, CS18, CS19, CS20, CS21, CS22, CS23, CS24, CS25, CS26, CS27, CS28, CS30, CS32, CS33, CS40, CS41, CS42, CS43, CS44, CS45, CS50, CS51, CS52, CS53, CS54, CS59, CS60, CS61, CS62, CS63, CS64, CS65, CS66, CS67, CS70, CS71). The "MAINTENANCE" section has a calendar view for June 2017, with a "List" button and a "Today" label. The calendar shows dates from 28 to 30, with some dates circled in red (29, 30, 31) and others in blue (2, 3, 9, 10, 17).

- 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**

★★★★★ (249)

 **Salesforce Adoption Dashboards**

★★★★★ (48) **LIGHTNING READY**

FREE

 **Field Trip**

★★★★★ (129) FREE

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

★★★★★ (298)

 **Data Quality Analysis Dashboards**

★★★★★ (30) **LIGHTNING READY**

FREE

 **Octopus**

★★★★★ (29) **LIGHTNING READY**

FREE

# How Do I Decide Which App to Choose?

Read community-sourced reviews of Apps

[https://sfdc.co/apps\\_npos](https://sfdc.co/apps_npos)



**App Advice and Consumer Reports**



Post

Share with App

Show A

- Group Settings
- Group Report
- Group Engagement

Information

Community sourced list of commonly used Salesforce Apps by the Salesforce.org community

Community Generated App Consumer Reports:

- Completed
- Online Forms
- Event Management
- Address Verification
- Scheduling

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!

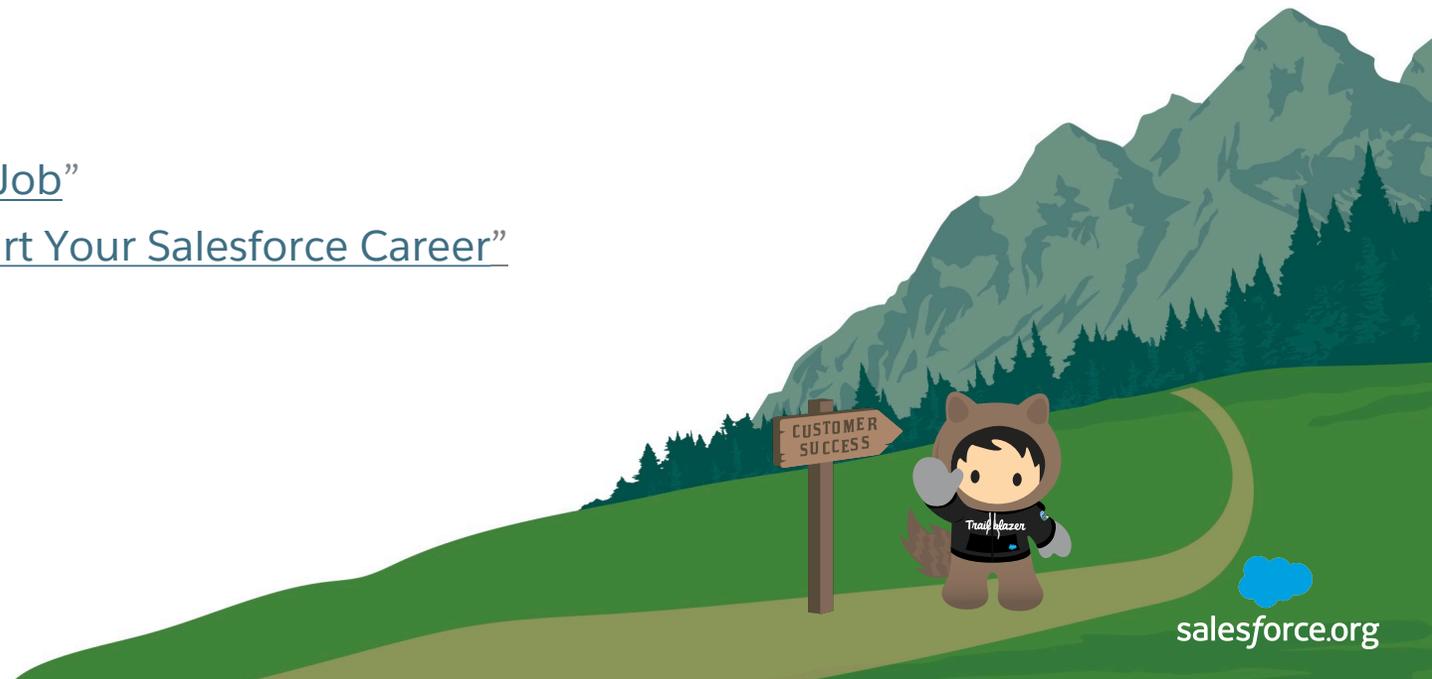
CUSTOMER  
SUCCESS



[salesforce.org](https://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

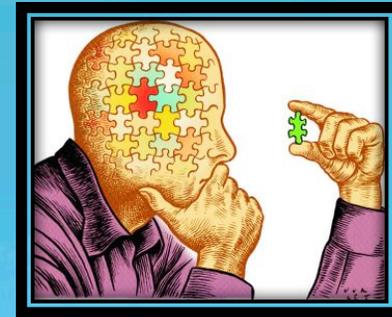
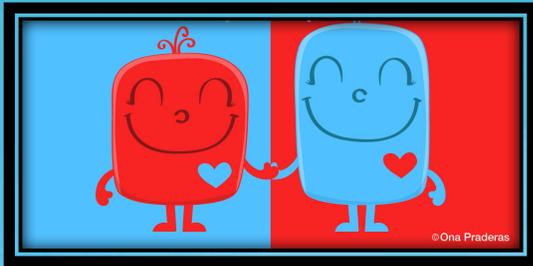
Data Model and Manipulation, Configuration, Data Security, Reporting, and Automation

- 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?

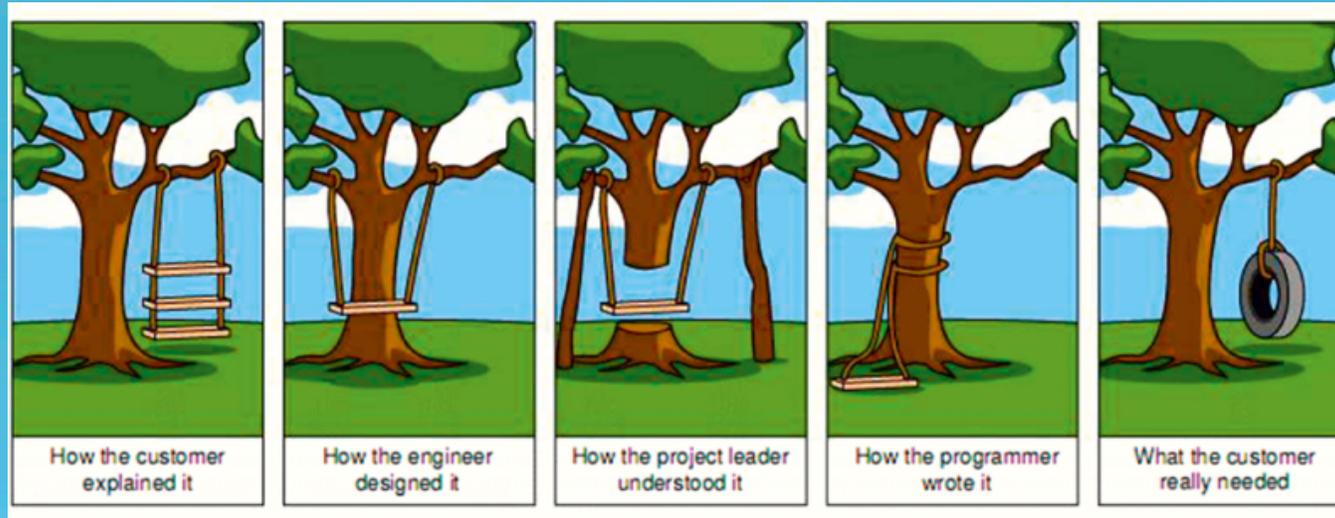
# Move from Average Admin to Admin Trailblazer!

“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 wooden signpost stands in a lush green field. The signpost is made of two vertical wooden posts and a horizontal crossbar. A dark brown rectangular sign is suspended from the crossbar by two black straps. The sign features the text 'Q & A' in a white, sans-serif font. The background is a vibrant landscape with rolling green hills, a dense line of dark green trees, and distant mountains under a bright blue sky with large, white, fluffy clouds. A large, light-colored rock sits at the base of the left post.

Q & A

# Thank You



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