

Fonteva System Administrator Training Agenda

Day 1

General Org Setup & User Management

Duration	Session	Topics
3 hours	General Org Setup & User Management	<p>Getting Org Ready for Users</p> <ul style="list-style-type: none"> ● Setup Company Information ● Grant Login Access for Support ● Organization-Wide Email Addresses ● Configure App Manager <p><i>10-MIN BREAK</i></p> <p>Setting Up and Managing Users</p> <ul style="list-style-type: none"> ● Create and Manage Users ● Troubleshoot User Login Issues and Password Resets <p>Manage Profiles</p> <ul style="list-style-type: none"> ● Overview of Profiles & Licenses ● Review Staff Profile <ul style="list-style-type: none"> ○ Determine Object Access ○ Security and Data Access ○ Manage Field Level Security ○ Restrict Logins ● Permission Sets <p><i>10-MIN BREAK</i></p> <p>Email Automation</p> <ul style="list-style-type: none"> ● Overview of Flows, Email Templates, & Email Alerts ● Review Flows <p>Report Administration</p> <ul style="list-style-type: none"> ● Custom Report Types ● Grant Report Access



Day 2

Fonteva & Salesforce Admin Topics

Duration	Session	Topics
3.5 hours	Fonteva & Salesforce Admin Topics	<p>Fonteva Configuration</p> <ul style="list-style-type: none">● Spark Admin<ul style="list-style-type: none">○ Product Updates○ Rollup Summary Fields○ Organization & User Preferences○ Registered Apps & Objects○ Access Manager● System Logs● Schedule Jobs <p><i>10-MIN BREAK</i></p> <p>All Sites</p> <ul style="list-style-type: none">● Overview of Community Site & Community Menu Items● Community Builder Overview<ul style="list-style-type: none">○ Login Page○ Theme○ Logo● Welcome Email (Site Settings)● Sharing Settings (Record Access) <p><i>10-MIN BREAK</i></p> <p>Object Manager</p> <ul style="list-style-type: none">● Field Sets:<ul style="list-style-type: none">○ Portal○ Financial Documents● Updating Page Layouts● Updating Lightning Page Layouts● Updating Compact Layouts● Configure Search Settings

Day 3

Managing Data

Duration	Session	Topics
1 hour	Managing Data	<p>Managing Data</p> <ul style="list-style-type: none">● Update Existing Records with the Data Loader● Backup Data with a Weekly Export
1 hour	Parking Lot	Parking Lot Q/A Session

