

# Fonteva System Administrator Training Agenda

## Day 1

### General Org Setup & User Management

Duration	Session	Topics
11 am - 1 pm (EST) 2 hours	General Org Setup & User Management - Part 1	<p>Getting Org Ready for Users</p> <ul style="list-style-type: none"> <li>• Setup Company Information</li> <li>• Grant Login Access for Support</li> <li>• Configure App Manager</li> </ul> <p>Salesforce Licenses, Profiles, &amp; Users</p> <ul style="list-style-type: none"> <li>• Licenses &amp; Profiles Overview</li> <li>• Users Overview</li> </ul> <p>Setting Up and Managing Users</p> <ul style="list-style-type: none"> <li>• Create and Manage Users</li> <li>• Troubleshoot User Login Issues and Password Resets</li> </ul>
<i>BREAK - 45 minutes</i>		
1:45 pm - 4:30 pm (EST) 2.75 hours	General Org Setup & User Management - Part 2	<p>Manage Profiles</p> <ul style="list-style-type: none"> <li>• Review Staff Profile <ul style="list-style-type: none"> <li>○ System Permissions</li> <li>○ Object Settings</li> <li>○ Security Sessions &amp; Password Policies</li> <li>○ Login Hours &amp; Login IP Ranges</li> </ul> </li> </ul> <p>Permission Sets &amp; Permission Set Groups</p> <ul style="list-style-type: none"> <li>• Permission Sets</li> <li>• Permission Set Groups</li> </ul>



## Day 2

### Fonteva & Salesforce Admin Topics

Duration	Session	Topics
11 am - 1 pm (EST) 2 hours	Fonteva & Salesforce Admin Topics - Part 1	Fonteva Configuration <ul style="list-style-type: none"><li>● Spark Admin<ul style="list-style-type: none"><li>○ Product Updates and Installed Packages</li><li>○ Rollup Summary Fields</li><li>○ Organization &amp; User Preferences</li><li>○ Registered Apps &amp; Objects</li><li>○ Access Manager</li><li>○ Fonteva Permissions Sets</li></ul></li></ul>
<i>BREAK - 45 minutes</i>		
1:45 pm - 4:30 pm (EST) 2.75 hours	Fonteva & Salesforce Admin Topics - Part 2	Fonteva Configuration Continued <ul style="list-style-type: none"><li>● System Logs</li><li>● Scheduled Jobs</li></ul> All Sites <ul style="list-style-type: none"><li>● Overview of Community Site &amp; Community Menu Items</li><li>● Community Builder Overview<ul style="list-style-type: none"><li>○ Login Page</li><li>○ Theme</li><li>○ Logo</li></ul></li><li>● Welcome Email (Site Settings)</li><li>● Sharing Settings (Record Access)</li></ul> Object Manager <ul style="list-style-type: none"><li>● Field Sets:<ul style="list-style-type: none"><li>○ Portal</li><li>○ Financial Documents</li></ul></li><li>● Updating Page Layouts</li><li>● Updating Lightning Page Layouts</li><li>● Updating Compact Layouts</li><li>● Configure Search Settings</li></ul>

## Day 3

### Managing Data

Duration	Session	Topics
11 am - 1:30 pm (EST)	Managing Data	Managing Data <ul style="list-style-type: none"><li>● Update Existing Records with the Data Loader</li></ul>



2.5 hours		<ul style="list-style-type: none"> <li>• Backup Data with a Weekly Export</li> </ul> <p>Salesforce APIs</p> <ul style="list-style-type: none"> <li>• API Overview</li> <li>• API Request Limits &amp; Allocations</li> </ul>
<i>BREAK - 45 minutes</i>		
2:15 pm - 3:30 pm (EST) 1.25 hour	Email Automation & Report Administration	<p>Email Automation</p> <ul style="list-style-type: none"> <li>• Organization-Wide Email Addresses</li> <li>• Overview of Flows, Email Templates, &amp; Email Alerts</li> <li>• Review a Flow</li> </ul> <p>Report Administration</p> <ul style="list-style-type: none"> <li>• Custom Report Types</li> <li>• Edit Report Layouts</li> <li>• Grant Report Access</li> </ul>
<i>BREAK - 15 minutes</i>		
3:45 pm - 4:30 pm (EST) 45 mins	Parking Lot	<p>Parking Lot Q/A Session</p> <ul style="list-style-type: none"> <li>• Q/A Review</li> </ul>

