

# Fonteva System Administrator Training Agenda

## Day 1

### General Org Setup & User Management

Duration	Session	Topics
2.5 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>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> <p><i>10-MIN BREAK</i></p> <p>Manage Profiles</p> <ul style="list-style-type: none"> <li>● Overview of Profiles &amp; Licenses</li> <li>● Review Staff Profile <ul style="list-style-type: none"> <li>○ Determine Object Access</li> <li>○ Security and Data Access</li> <li>○ Manage Field Level Security</li> <li>○ Restrict Logins</li> </ul> </li> <li>● Permission Sets</li> </ul>
<i>BREAK - 30 minutes</i>		
1.5 hours	General Org Setup & User Management - Part 2	<p>Email Automation</p> <ul style="list-style-type: none"> <li>● Organization-Wide Email Addresses</li> <li>● Overview of Workflows/Flows, Email Templates, &amp; Email Alerts</li> <li>● Review Flows</li> </ul> <p>Report Administration</p> <ul style="list-style-type: none"> <li>● Custom Report Types</li> <li>● Grant Report Access</li> </ul>



## Day 2

### Fonteva & Salesforce Admin Topics

Duration	Session	Topics
2.5 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</li><li>○ Rollup Summary Fields</li><li>○ Organization &amp; User Preferences</li><li>○ Registered Apps &amp; Objects</li><li>○ Access Manager</li></ul></li><li>● System Logs</li><li>● Schedule Jobs</li></ul>
<i>BREAK - 30 minutes</i>		
2 hours	Fonteva & Salesforce Admin Topics - Part 2	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> <p><i>10-MIN BREAK</i></p> 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
2 hour	Managing Data	Managing Data <ul style="list-style-type: none"><li>● Update Existing Records with the Data Loader</li><li>● Backup Data with a Weekly Export</li></ul>
<i>BREAK - 30 minutes</i>		
1 hour	Parking Lot	Parking Lot Q/A Session

