

## Lightning Experience Administrative Essentials for New Admins Extended

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### Course Summary

#### Description

Extensive and interactive, Administrative Essentials for New Admins in Lightning Experience is the core training that ensures your success with Salesforce Lightning — and it's now available in a flexible and virtual format! The new delivery gives you the option to get up to speed with the learning included in the Administrative Essentials for New Admins in Lightning Experience (ADX201) class over the course of 10 days.

#### Objectives

At the end of this course, students will be able to:

- Customize your application, including page layouts, fields, tabs, and business processes in Lightning Experience.
- Learn how security settings created in Salesforce Classic are applied in Lightning.
- Maintain and import clean data in Lightning.
- Use Lightning features to create high-value reports and dashboards
- Understand how workflow automation complies with Lightning.

#### Topics

- Getting Around the App
- Getting your Organization Ready for Users
- Setting Up and Managing Users
- Security and Data Access
- Object Customizations
- Managing Data
- Reports and Dashboards
- Automation
- Managing the Support Process

#### Audience

This class is designed for sales representatives and managers, as well as beginning administrators.

#### Prerequisites

There are no prerequisites for this course.

#### Duration

Ten days

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### Course Outline

- I. *Getting Around the App*
  - A. Data Model and Navigation
  - B. Lightning Experience
  - C. Help & Training
- II. *Getting your Organization Ready for Users*
  - A. Setting Up the Company Profile
  - B. Configuring the User Interface
  - C. Setting Up Activities and Calendars
  - D. Configuring Search Settings
  - E. Setting Up Chatter Groups
  - F. Mobile Access with Salesforce1
- III. *Setting Up and Manager Users*
  - A. Managing User Profiles
  - B. Managing Users
  - C. Setting Up Chatter Free Users and Invites
  - D. Troubleshooting Login Issues
- IV. *Security and Data Access*
  - A. Restricting Logins
  - B. Determining Object Access
  - C. Setting Up Record Access
  - D. Creating a Role Hierarchy
  - E. Dealing with Record Access Exceptions
  - F. Managing Field-level Security
- V. *Object Customizations*
  - A. Administering Standard Fields
  - B. Creating New Custom Fields
  - C. Creating Selection Fields: Picklists and Lookups
  - D. Creating Formula Fields
  - E. Working with Page Layouts
- F. Working with Record Types and Business Processes
- G. Maintaining Data Quality
- VI. *Managing Data*
  - A. Import Wizards
  - B. Data Loader
  - C. Data.com
  - D. Mass Transfer
  - E. Backing Up Data
  - F. Mass Delete and Recycle Bin
- VII. *Reports and Dashboards*
  - A. Running and Modifying Reports
  - B. Creating New Reports with the Report Builder
  - C. Working with Report Filters
  - D. Summarizing with Formulas and Visual Summaries
  - E. Printing, Exporting, and Emailing Reports
  - F. Building Dashboards
- VIII. *Automation*
  - A. Email Templates
  - B. Workflow Rules
  - C. Process Builder
  - D. Lead Automation
- IX. *Managing the Support Process*
  - A. Managing and Resolving Cases
  - B. Customizing a Support Process
  - C. Automating Support
  - D. Understanding the Salesforce Console for Service
  - E. Collaborating in the Service Cloud
  - F. Analyzing Support Data