

Essentials for New Lightning Experience Administrators

Duration: 5 Days Course Code: ADX-201

Overview:

Discover the world of a Salesforce Administrator by working firsthand to configure and customize a Salesforce org. In this 5-day class designed for new admins, our experts guide you through the important tasks and features that Salesforce Administrators encounter daily. Learn about Salesforce's architecture, how to manage users, and how to keep your org secure. Dive into best practices surrounding customization, set up automations to improve efficiency, and create reports and dashboards for data analysis.

Target Audience:

This class is ideal for new and beginner Salesforce System Administrators, as well as Trailblazers looking to increase their skills around the configuration, maintenance, and automation of a Salesforce org. This is also a great class for anyone looking to earn their Salesforce Administrator credential.

Objectives:

- Explain the Salesforce architecture and key terminology.
 - Describe use cases for data management and validation tools.
 - Use the application development lifecycle to define the process of managing an apps development, from design to final release.
 - Analyze key performance indicators with reports and dashboards.
 - Compare different methods for granting users access to functionality and data.
 - Automate business processes using key features and functionality.
 - Build and customize applications to meet business requirements.
 - Leverage the Salesforce ecosystem and resources to implement and maintain your Salesforce org.
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Content:

Salesforce Fundamentals

- Explore Salesforce
- Salesforce Architecture

Administrator Responsibilities

- Describe the Role of an Administrator
- Plan for Success

The Big Picture: All Users

- Company Information and Licensing
- Fiscal Year and Currency
- Organize and Collaborate
- Manage Users
- Login Security Controls

Feature Access and Object Security

- Profiles
- Permission Sets
- Field-Level Security

Salesforce Record Access

- Record Ownership
- Organization-Wide Defaults
- Role Hierarchy
- Sharing Rules
- Teams and Manual Sharing
- Restriction Rules

Customize Standard Functionality

- Object Overview
- Standard and Custom Fields
- Relationship Fields
- Custom Formula Fields

Customize the Existing User Interface (UI)

- Applications
- Home Page
- Tabs and List Views
- Page Layouts
- Buttons, Links, and Actions
- Record Types, Business Process, and Path

Create New with Clicks

- Create a New Object
- Dynamic Forms
- Create a New Custom Tab
- Create and Deploy a Change Set
- Mobile Layout

Declarative Automation

- Automation Fundamentals
- Validation Rules
- Lead and Case Management
- Workflow and Approval Process
- Process Builder

The Future of Automation: Flow

- Flow Overview
- Build a Flow to Update a Field
- Build and Combine Flows
- Deploy Flow with a Lightning Component
- Order of Execution

Data Management

- Back Up Data
- Import, Export, and Update Data
- Mass Delete and Mass Transfer
- Data Quality and Cleansing Tools

Analytics

- Report Components
- Filters and Formulas
- Conditional Formatting and Charts
- Exports and Subscriptions
- Dashboards

Further Information:

For More information, or to book your course, please call us on 0800/84.009

info@globalknowledge.be

www.globalknowledge.com/en-be/