

## Essentials for New Lightning Experience Administrators

**Duration: 5 Days**    **Course Code: ADX-201**    **Delivery Method: Virtuel deltagelse**

### Overview:

Extensive and interactive, Administrative Essentials in Lightning Experience is the core training that ensures your success with Salesforce Lightning.

It's a must for new administrators, and we recommend completing this course before starting a Salesforce deployment or when taking over an existing deployment.

Discover the world of a Salesforce Administrator by working first-hand 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 keep your org secure. Dive into best practices surrounding customization, set up automations to improve efficiency, and create reports and dashboards for data analysis.

### Virtuel deltagelse

Et V&C Select kursus indholder nøjagtig det samme som et almindeligt kursus. Før kursusstart modtager man kursusmaterialet. Dernæst logger man på kurset via internettet og ser via sin pc den selvsamme præsentation som de øvrige deltagere, man kommunikerer via chat med underviseren og de øvrige deltagere på kurset. Denne uddannelsesmodel er både tids-og omkostningsbesparende og kan være et oplagt alternativ til almindelig klasseundervisning, hvis man f.eks. har et begrænset rejsebudget.

### Target Audience:

The recommended 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. New system administrators responsible for the setup, configuration, and maintenance of their organization's Salesforce applications. Other groups that would benefit from deepening their knowledge of Salesforce Lightning Experience, including power users, sales operations, and IT managers.

### Objectives:

- After this course, you 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.

### Prerequisites:

The prerequisites include a solid understanding of basic Salesforce concepts and functionality, and completion of the following online courses, which are available at [help.salesforce.com](https://help.salesforce.com).

- Getting Started: Navigating Salesforce
- Getting Started: Using the Sales Cloud
- We also strongly recommend you complete the Get Started with Lightning Experience trail in Trailhead to get the most out of this course.

## Content:

### Getting Around the App

- Data Model and Navigation
- Lightning Experience
- Help & Training

### Getting Your Organization Ready for Users

- Setting Up the Company Profile
- Configuring the User Interface
- Setting Up Activities and Calendars
- Configuring Search Settings
- Setting Up Chatter Groups
- Mobile Access with Salesforce1

### Setting Up and Managing Users

- Managing User Profiles
- Managing Users
- Setting Up Chatter Free Users and Invites
- Troubleshooting Login Issues

### Security and Data Access

- Restricting Logins
- Determining Object Access
- Setting Up Record Access
- Creating a Role Hierarchy
- Dealing with Record Access Exceptions
- Managing Field-level Security

### Object Customizations

- Administering Standard Fields
- Creating New Custom Fields
- Creating Selection Fields: Picklists and Lookups
- Creating Formula Fields
- Working with Page Layouts
- Working with Record Types and Business Processes
- Maintaining Data Quality

### Managing Data

- Import Wizards
- Data Loader
- Data.com
- Mass Transfer
- Backing Up Data
- Mass Delete and Recycle Bin

### Reports and Dashboards

- Running and Modifying Reports
- Creating New Reports with the Report Builder
- Working with Report Filters
- Summarizing with Formulas and Visual Summaries
- Printing, Exporting, and Emailing Reports
- Building Dashboards

### Automation

- Email Templates
- Workflow Rules
- Process Builder
- Lead Automation

### Managing the Support Process

- Managing and Resolving Cases
- Customizing a Support Process
- Automating Support
- Understanding the Salesforce Console for Service
- Collaborating in the Service Cloud
- Analyzing Support Data

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## Further Information:

For More information, or to book your course, please call us on tlf.nr.: 44 88 18 00

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