ADMINISTRATIVE ESSENTIALS FOR NEW ADMINS IN LIGHTNING EXPERIENCE

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.

WHO SHOULD TAKE THIS COURSE?

- 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.

WHEN YOU COMPLETE 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.

- 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.

DURATION

- 5 days

DELIVERY FORMAT

- Classroom

AUDIENCE

New System Administrators,
Power Users,
Sales Operations, and
IT Managers

REGISTER NOW →

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MODULES & TOPICS

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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