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Course Outline :: ADX201::

Module Title   :   ADX201 - Essentials for New Lightning Experience Administrators

Duration   :   5 days

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.

WHO SHOULD TAKE THIS COURSE?

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.

WHEN YOU COMPLETE THIS COURSE, YOU WILL BE ABLE TO:

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

MODULES & TOPICS

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

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- Conditional Formatting and Charts
- Exports and Subscriptions
- Dashboards