ESSENTIALS FOR NEW LIGHTNING EXPERIENCE ADMINISTRATORS (ADX201)

OVERVIEW

Discover the world of a Salesforce Administrator by configuring and customizing a Salesforce org. In this 5-day instructor-led course designed for new admins, our experts guide you through the important tasks and features that Salesforce Administrators encounter daily. Learn about Salesforce architecture, how to manage users, and how to keep your org secure. Explore 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.
• Build a Sandbox to create, test, and move data to a Salesforce production org.
• Compare different methods for granting users access to functionality and data.
• Customize applications to meet business requirements.
• Describe use cases for data management and validation tools.
• Analyze key performance indicators (KPIs) with reports and dashboards.
• Automate business processes using key features and functionality.
• Use the Salesforce ecosystem and resources to implement and maintain your Salesforce org.

PREWORK

Please complete the following trailmix before attending our expert-led class:

Trailmix, Trailhead Academy

IMPORTANT : If you use your personal computer and a configuration is described in the Computer Setup Guide, you must complete it before attending the class.

CERTIFICATION

ADX201 is recommended to prepare Salesforce Certified Administrator exam. Other courses and self-study materials are recommended for this exam. The complete list of prerequisites is provided by Salesforce in the Exam Guide. Registration for an inter-company training session entitles you to a voucher to pass the corresponding certification exam. The voucher, valid for 6 to 12 months, is sent to the trainee on request, at no additional cost. Note that this offer is valid for only one voucher per certification; If you register for multiple courses preparing for the same certification, you will be entitled to only one free voucher.

Note :
- Salesforce certification exam doesn't take place during the training and it's up to the delegate to register to the exam via the webassessor
- We don't recommend passing the Salesforce certification exam directly after attending the course. Additional work must be provided

DURATION
5 days

DELIVERY FORMAT
- Classroom
- Virtual

LANGUAGE
Course in French /
Books in French and English /
Environment test in English

USER INTERFACE
Lightning Experience

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LESSONS & TOPICS

Salesforce fundamentals
- Explore Salesforce
- Navigate the Salesforce Architecture

The Big Picture: All Users
- Gather Company Information and Licensing
- Determine your Fiscal Year and Currency
- Organize and Collaborate
- Manage Users
- Assess Login Security Controls

Feature and Object Access
- Understand Profiles
- Define Permission Sets
- Evaluate Field-Level Security

Record Access
- Determine Record Ownership
- Establish Organization-Wide Defaults
- Build Role Hierarchy
- Implement Sharing Rules
- Design Teams and Manual Sharing
- Set Restriction Rules

Standard Functionality Customizations
- Understand an Object
- Explore Standard and Custom Fields
- Navigate Relationship Fields
- Generate Custom Formula Fields

The Existing User Interface (UI)
- Customize Applications
- Build a Home Page
- Explore Tabs and List Views
- Adjust Page Layouts
- Generate Dynamic Forms
- Incorporate Buttons, Links, and Actions
- Design Record Types, Business Process, and Path

Data Management
- Back Up Data
- Import, Export, and Update Data
- Mass Delete and Mass Transfer
- Use Data Quality and Cleaning Tools

Declarative Automation
- Learn Automation Fundamentals
- Build Validation Rules
- Manage Leads and Cases
- Design Workflows and Processes
- Outline an Approval Process

The Future of Automation: Flow
- Define Flow
- Build a Flow to Update a Field
- Build and Combine Flows
- Deploy Flow with a Lightning Component
- Follow Order of Execution

New Objects
- Create a New Object
- Create a New Custom Tab
- Deploy a Change Set
- Generate a Mobile Layout

Analytics
- Define Report Components
- Create Filters and Formulas
- Implement Conditional Formatting and Charts
- Manage Exports and Subscriptions
- Build Dashboards