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Expert-Led Classes > Essentials for New Lightning Experience Administrators

Essentials for New Lightning Experience Administrators (ADX201)

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.

Show Less

Overview   Class Regist…

Job Role

Admin

Duration

In-Person: 5 Day(s)

Virtual: 5 Day(s)

User Interface

Lightning Experience

Related Classes

In-person Class
Prepare for your Administrator Certification Exam

In-person Class
Reporting Fundamentals in Lightning Experience

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(https://trailhead.salesforce.com/help)

Overview

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.

Prework

Prepare for the course with this Trailmix.

Trailmix, Trailhead Academy

Essentials for New Lightning Experience Administrators Prework

Prepare for your Trailhead course by completing this prework.

Class Registration

Billing country

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Currency

Choose ⌄

Classes can only be purchased in a currency that your billing country supports. Use the Billing Country filter to see available classes. If your billing country/currency isn't available, contact us (https://trailhead.salesforce.com/help?topic=Trailhead_Academy&topicName=Trailhead%20Academy&groupName=Trailhead_Support).

Virtual Class

Essentials for New Lightning Experience Administrators (ADX201)

Nov 7 through Nov 11, 2022 at 9:00 AM - 5:30 PM CET (12:00 AM - 8:30 AM PST) · Delivered by Authorized Training Provider · K2 University Germany · Virtual

Register

Language: Deutsch   €3,625.00 (EUR)

Virtual Class

Essentials for New Lightning Experience Administrators (ADX201)

Nov 7 through Nov 11, 2022 at 8:30 AM - 5:00 PM CST (6:30 AM - 3:00 PM PST) · Delivered by Salesforce · Virtual Training #2 · Virtual

Register

Language: English $4,500.00 (USD)

Virtual Class

Essentials for New Lightning Experience Administrators (ADX201)

Nov 7 through Nov 11, 2022 at 8:30 AM - 5:00 PM PST · Delivered by Salesforce · Virtual Training #2 · Virtual

Register

Language: English $4,500.00 (USD)

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Lessons and 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
- Conditional Formatting and Charts
- Exports and Subscriptions
- Dashboards

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English