



# Essentials for New Lightning Experience Administrators – Extended (ADX201E)

Course ID #: 7000-826-ZZ-Z

Hours: 70

## Course Content

### Course Description:

In this course, you will work firsthand to configure and customize a Salesforce org. In this 10-day extended delivery 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.

### Course Objectives:

Upon successful completion of this course students will be able to:

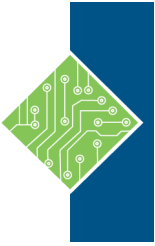
- Explain the Salesforce architecture and key terminology.
- Use the application development lifecycle to define the process of managing an app's development, from design to final release.
- Compare different methods for granting users access to functionality and data.
- Build and customize applications 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

### Prerequisites:

N/A

### Target 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.



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## Topics:

### Lesson 1: Salesforce Fundamentals

- Explore Salesforce
- Salesforce Architecture

### Lesson 2: Administrator Responsibilities

- Describe the Role of an Administrator
- Plan for Success

### Lesson 3: The Big Picture: All Users

- Company Information and Licensing
- Fiscal Year and Currency
- Organize and Collaborate
- Manage Users
- Login Security Controls

### Lesson 4: Feature Access and Object Security

- Profiles
- Permission Sets
- Field-Level Security

### Lesson 5: Salesforce Record Access

- Record Ownership
- Organization-Wide Defaults
- Role Hierarchy
- Sharing Rules
- Teams and Manual Sharing
- Restriction Rules

### Lesson 6: Customize Standard Functionality

- Object Overview
- Standard and Custom Fields
- Relationship Fields
- Custom Formula Fields

### Lesson 7: 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

### Lesson 8: Create New with Clicks

- Create a New Object
- Dynamic Forms
- Create a New Custom Tab
- Create and Deploy a Change Set
- Mobile Layout

### Lesson 9: Declarative Automation

- Automation Fundamentals
- Validation Rules
- Lead and Case Management
- Workflow and Approval Process
- Process Builder



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## **Lesson 10: 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

## **Lesson 11: Data Management**

- Back Up Data
- Import, Export, and Update Data
- Mass Delete and Mass Transfer
- Data Quality and Cleansing Tools

## **Lesson 12: Analytics**

- Report Components
- Filters and Formulas
- Conditional Formatting and Charts
- Exports and Subscriptions
- Dashboards

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[www.tcworkshop.com](http://www.tcworkshop.com) or calling us at 800-639-3535