Salesforce Administration and Configuration in Lightning Experience (SP-ADX201)

Course ID #: 7000-416-ZZ-Z

Hours: 35

Course Content

Course Description:

In this course, you will cover the foundation of Salesforce in Lightning Experience and prepare for the Salesforce Certified Administrator exam. This course is an alternative to the Administration Essentials for New Admins in Lightning Experience (ADX201) offered by Salesforce. A student in this course will learn how to administer and configure Salesforce in Lightning. The instructor will cover all the basic administration concepts within Salesforce in addition to sharing real world experiences and best practices.

The course presents a broad range of topics covering just about everything on which a student will be tested. These topics include but are not limited to: basic administration, configuration, customization and data management. There is in depth coverage of system security topics such as: Users, Licenses, Profiles, Field Level Security, Permission Sets, Record Security, Organization Wide Defaults, Role Hierarchy & Roles, Sharing Rules, Account Teams, Sales Teams, and Queues. The object model related to sales force automation, marketing automation and service is thoroughly covered as well with sections on: Accounts, Contacts, Opportunities, Products & Price Books, Quotes, Leads, Campaigns, Cases, Solutions, Knowledge, Ideas and Answers. The automation of processes within Salesforce including the use of Workflow Rules, Approval Processes, and the Process Builder will be discussed and used in scenario driven exercises. Analytics, including Lightning Reports, Lightning Dashboards, and list views will be covered in detail as well.

Target Audience:

This training course is recommended to system administrators, consultants, business analysts and other technologists needing to learn the basics of Salesforce Administration while also preparing to become Salesforce Administrator Certified.

Topics:

Lesson 1:
- Organizational Setup
- User Setup
- Security and Access

Lesson 2:
- Standard and Custom Objects
- Sales and Marketing Apps

Lesson 3:
- Continued – Sales and Marketing Apps
- Service and Support Apps

Lesson 4:
- Data Management
- Analytics – Reports and Dashboards

Lesson 5:
- Workflow and Process Automation
- Activity Management and Collaboration
- Desktop and Mobile Administration

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