



Upgrading to Salesforce Lightning Experience (SPLX-201)

Course ID #: 6500-201-LX-W

Hours: 24

Course Content

Course Description:

Stony Point developed this class to help Salesforce Administrators, Consultants and other Technicians quickly learn the basics of Salesforce Lightning Experience with a particular emphasis on upgrading from Salesforce Classic. This class is an alternative to the Declarative Development for Platform App Builders in Lightning Experience (DEX402) class offered by Salesforce. The Stony Point version of the class offers relevant, real world examples, is delivered in less time, and costs less. Students completing this class will be prepared to take the Salesforce Platform App Builder exam. This class is delivered by a senior instructor with many years of real world programming experience and will cover the following topics:

- Lightning Experience Overview, including navigation, new features, and Einstein
- Classic features that are not yet available in Lightning (or are limited)
- Enabling Lightning and important steps to upgrade from Classic to Lightning
- Lightning App Builder, standard Lightning Components, Lightning pages and buttons, and Lightning Actions
- Process Builder, designing for mobile, and Lightning reports & dashboards

As a participant in the class, each student will be given a practice learning environment to use during hands-on exercises during the class. The student will be able to use this learning environment indefinitely after the class without any additional fee.

Target Student:

People with a strong technical background who are already familiar with Salesforce Classic, such as system administrators, developers or consultants, OR those who have experience with another CRM or ERP system and are looking to quickly develop equivalent skills on Salesforce.

Topics:

Day 1

- Agenda & Course Overview
- Introduction to GenWatt
- Setting up a Practice Site
- Users
- Login Policies
- Session Settings
- Lightning Overview
- User Interface
- Platform
- Mobile
- Lightning Experience
 - App Launcher
 - Lightning Apps
 - Home Page
 - News



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- Activity Timeline (most objects)
 - Task Compact Layout
- List Views
 - Kanban View
 - Charts
- Path
 - Display fields
 - Validation rules
- Lead Conversion
- Einstein
 - Discovery
 - Readiness Assessor
 - Activity Capture
 - Lead Scoring
 - Opportunity Scoring
 - Opportunity Insights
 - Account Insights
 - Automated Contacts
- Collaborative Forecasting
- Einstein Forecasting
- Classic Features Not Yet Available (or limited)
 - Reports
 - Dashboards
- **Day 2**
 - Sales Cloud
 - Service Cloud
 - Chatter & Files
 - Platform
 - Sharing Buttons
 - Console
- Features No Longer Available
 - Alternative Features
 - Migrating Attachments to Files
- Upgrading from Classic to Lightning
 - Lightning Readiness Report
 - Visualforce Readiness Report
- Enabling Lightning
 - Permission Set
 - The Switcher
- Model - View - Controller in Lightning
- Lightning Platform Architecture
- Lightning Connect
- Changes to URLs in Lightning
 - MyDomain
 - URL Buttons & Links
 - Report Parameters
- Lightning App Builder
- Lightning Pages
- Lightning Components
- AppExchange Components
- Lightning Tabs
- Salesforce Fields
 - Custom Field Types
 - Formula Fields
- Page Layouts
- Record Types
- Assigning Apps & Pages
- Editing Lightning Pages
- Buttons
- Actions
 - Categories
 - Types
 - Global Actions
- Sharing Actions
 - Organization Wide Defaults
 - Lightning Sharing AppExchange Package
- **Day 3**
 - Editing Lightning Pages
 - Compact Layouts
 - Salesforce App
 - Designing for Mobile
 - Mobile Cards



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- Mobile Actions
- Mobile Considerations
- Email
- Sending Email Options
- Enhanced Email
- Lightning Sync
- Lightning for Outlook
- Lightning for Gmail
- Email Templates
- Process Builder
 - Creating Records
- Approval Processes
 - Automatic Approvals using Process Builder
- Apex
 - When to Use Apex
 - Development Path
 - Remote Site Settings
- Process Builder & Apex
 - Calling a Process from an Action
 - Calling an Apex class from a Process
- Visual Workflow
 - Creating Flows
- Workflow Best Practices
- Visualforce
 - When to Use
 - Upgrading
- Lightning Community Builder
- Partner Community
- Customer Community
- Lightning Sites
- Salesforce Metadata
 - Setup Audit Trail
- Deployment & Change Management
 - Sandboxes
 - Metadata API
 - Packages
 - Change Sets