

**Salesforce Administration in Lightning Experience**

**Course Number:** SF-114
**Duration:** 5 days

**Overview**

This Salesforce® Administration in Lightning Experience training course teaches attendees how to administer modern Salesforce. The class includes real-world tips and best practices and helps participants prepare for the Salesforce Certified Administrator exam.

**Prerequisites**

All students must have a strong technical background, such as system administrators, developers, or consultants, and have had experience with another CRM or ERP system.

**Materials**

All Salesforce training students will receive comprehensive courseware.

**Software Needed on Each Student PC**

Salesforce is web-based and attendees only need an Internet connection and modern web browser for training. Salesforce recommends Chrome.

**Objectives**

* Perform basic administration
* Navigate the Salesforce Platform architecture
* Configure Salesforce
* Customize and manage data
* Secure Salesforce
* Automate Salesforce using the Salesforce object model
* Automate processes within Salesforce, including the use of Workflow Rules, Approval Processes, and the Process Builder
* Develop new applications on the Salesforce Platform using the declarative interface
* Leverage analytic tools including Lightning Reports, Lightning Dashboards, and list views

**Outline**

* Introduction to Salesforce and the Salesforce Platform
	+ About this course
	+ Intros
	+ Housekeeping
	+ Agenda
	+ Set up Practice Site
* Salesforce Infrastructure
	+ Salesforce Architecture
		- Platform Foundation
		- Salesforce Stack
		- Instance
		- Trust.com
		- What is an Org?
		- Data Model
* Organizational Set up
	+ Company Information
		- Locale settings
		- Fiscal Year
		- Currency
		- User Interface Settings
		- Search
		- List Views (high-level overview)
		- Home Page sections
	+ Setting up Users
		- Users
		- User settings
		- Activate, deactivate, freeze
		- Create a new User
		- Login Access Policies
		- Security & Activation
		- Login History
		- Session Settings
		- Set Login as user setting
		- Granting access as a user
		- Knowledge Check
* System Security and Access
	+ Levels of Data Security
		- Security Categories Overview
		- Org Access
		- Object Access
		- Record Access
	+ Groups and Teams
		- Public Groups
		- Account Teams
		- Opportunity Teams
		- Case Teams
		- Team Comparison chart
		- Field Access
	+ Additional Security Measures
		- Queues and SecurityQueues
		- Folder Access & Security
		- Scenario Discussions: Security and Sharing
* Salesforce Objects
	+ Objects, Fields, and their relationships
		- Standard
		- Custom
		- Object Relationships
		- Salesforce Fields
* Page Layouts and Record Types
	+ Page Layouts and Record Types
		- Page Layouts
		- Assigning page layouts
		- Record Types
		- New Account page layouts and Record Types
		- Opportunity Page Layout
		- Create an Opportunity Page Layout
* Salesforce Sales and Marketing
	+ Sales
		- Sales Processes
		- Sales Productivity Features (Opportunity Tools)
	+ Marketing
		- Leads
		- Campaigns
		- Marketing Department
		- Create a Campaign
		- Web to Lead
		- Lead Assignment Rule
		- Auto-Response Rule
		- Create a Campaign
		- Web to Lead
		- Lead Assignment Rule
		- Auto-Response Rule
		- Salesforce Content
		- Content in Marketing
* Service and Support
	+ Cases
		- Case Management Tools
	+ Knowledge
		- Knowledge
		- Data Categories
	+ Entitlement Management
		- Entitlements
		- Milestones
	+ Case Feed
		- Case Feed – Classic
		- Chatter Feed – Lightning
	+ Experience Cloud Sites
		- Capabilities
		- Use Cases
		- Designing Options
* Data Management
	+ Data Quality
		- Garbage In, Garbage out
		- Results from Good and Bad Data
		- Ensuring Quality Data
	+ Salesforce Record IDs
		- Internal
		- External
		- External IDs
	+ Data Migration Tools
		- Lightning Connect
		- Import Wizard
		- Data Loader
		- Mass Transfer
		- 3
		- Mass Delete
	+ Data Validation
		- Data Validation
		- Validation Rules
		- Data Backup
* Analytics Reports and Dashboards
	+ Reports Overview
		- Security
		- Terminology
		- Prebuilt Reports
		- Reports Folders
	+ Types of Reports
		-
	+ Dashboards
		- Dashboard Overview
		- Prebuilt Dashboards
		- Creating Dashboards
		- Subscribing to Dashboards
* Process Automation
	+ What is Automation
		- Overview
		- Flow Terminology
		- Workflow Rule vs Flow
		- Apex
		- When to use Apex
		- Apex Key Concepts
		- Visualforce
		- When to use Visualforce
		- Development Path
* Workflow
	+ Rules
	+ Workflow Actions
	+ Workflow field update
	+ Time-based workflow
	+ Set Default Workflow User
	+ Approval Processes
	+ Lightning Process Builder
* Collaboration
	+ Chatter
		- Terminology
		- Using Chatter
		- Setting up your Chatter Profile
		- Using Chatter #
		- Using Chatter @
		- Following in Chatter
		- Chatter Groups
		- Chatter Feed Tracking
		- EX: Enable Chatter Feed Tracking
		- Chatter Security
* Mobile App and The App Exchange
	+ - Mobile App
* Exam and Exam Review