

**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