

**Salesforce End User (Lightning)**

**Course Number:** SF-108
**Duration:** 1 day

**Overview**

This Salesforce® End User (Lightning) training course teaches new users (and current users wanting to better leverage its full power) how to use the Salesforce platform effectively.

**Prerequisites**

No prior experience is presumed.

**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**

* Complete the login process
* Use Salesforce® nomenclature – Apps, Objects, Records
* Configure Personal Settings
* Navigate in Lightning
* Use the sharing model
* Use Standard Objects
* Use Custom Objects, Field types, Custom fields
* Create List Views
* Create, edit, and delete records
* Use Tasks
* Use Events
* Create email templates
* Email from record pages and List Views
* Create Reports and Dashboards
* Use Help and Training
* Use the AppExchange
* Find other Learning resources

**Outline**

* Introduction
* Logging in
	+ Username and passwords
	+ Password policies
* Salesforce Nomenclature
	+ Apps
	+ Objects
	+ Tabs
	+ Records
* Navigating in Salesforce
	+ App Launcher
	+ Search
	+ Tabs
	+ Favorites
	+ Global Actions
	+ Notifications
	+ Viewing Records
* Personal Settings
	+ User Info
	+ Customizing pages
	+ Email Settings
	+ Activity Reminders
	+ Adding Navigation Tabs
* Sharing Model
	+ Profiles
	+ OWD
	+ Roles
	+ Sharing Rules
* Objects
	+ The main standard objects
	+ Custom objects
	+ Records
	+ Fields
* Field Customization
	+ Custom Fields
	+ Formula Fields
	+ Required Fields
* List Views
	+ Standard List Views
	+ Custom List Views
	+ Tagging a List View as a Favorite
* Using Records
	+ Create, view, edit, delete
	+ Undelete Records
* Activities and Calendars
	+ Tasks
	+ Events
	+ Calendars
* Sending Email from Salesforce
	+ Email Integration
	+ Email Templates
* Reports and Dashboards
	+ Creating Reports
	+ Creating Dashboards
* Converting Leads
	+ Convert a Lead
* Other Tools
	+ Help and Training
	+ AppExchange
	+ Salesforce Community
	+ Trailhead
	+ User Groups
* Conclusion