

**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