

# ESSENTIALS FOR NEW LIGHTNING EXPERIENCE ADMINISTRATORS (ADX201)



## OVERVIEW

Discover the world of a Salesforce Administrator by working firsthand to configure and customize a Salesforce org. In this 5-day class designed for new admins, our experts guide you through the important tasks and features that Salesforce Administrators encounter daily. Learn about Salesforce's architecture, how to manage users, and how to keep your org secure. Dive into best practices surrounding customization, set up automations to improve efficiency, and create reports and dashboards for data analysis.

## WHO SHOULD TAKE THIS COURSE?

This class is ideal for new and beginner Salesforce System Administrators, as well as Trailblazers looking to increase their skills around the configuration, maintenance, and automation of a Salesforce org. This is also a great class for anyone looking to earn their Salesforce Administrator credential.

## WHEN YOU COMPLETE THIS COURSE, YOU WILL BE ABLE TO:

- Explain the Salesforce architecture and key terminology.
- Use the application development lifecycle to define the process of managing an app's development, from design to final release.
- Compare different methods for granting users access to functionality and data.
- Build and customize applications to meet business requirements.
- Describe use cases for data management and validation tools.
- Analyze key performance indicators with reports and dashboards.
- Automate business processes using key features and functionality.
- Leverage the Salesforce ecosystem and resources to implement and maintain your Salesforce org.

## PREWORK

Please complete the following trailmix before attending our expert-led class:

[Trailmix](#), [Trailhead Academy](#)

**IMPORTANT** : If you use your personal computer and a configuration is described in the [Computer Setup Guide](#), you must complete it before attending the class.

## CERTIFICATION

ADX201 is recommended to prepare Salesforce Certified Administrator exam. Other courses and self-study materials are recommended for this exam. The complete list of prerequisites is provided by Salesforce in the [Exam Guide](#). Registration for an inter-company training session entitles you to a voucher to pass the corresponding certification exam. The voucher, valid for 6 to 12 months, is sent to the trainee on request, at no additional cost. Note that this offer is valid for only one voucher per certification; If you register for multiple courses preparing for the same certification, you will be entitled to only one free voucher.

### **Note** :

- Salesforce certification exam doesn't take place during the training and it's up to the delegate to register to the exam via the webassessor
- We don't recommend passing the Salesforce certification exam directly after attending the course. Additional work must be provided



**DURATION**  
5 days

**DELIVERY FORMAT**  
- Classroom  
- Virtual

**LANGUAGE**  
Course in French /  
Books in French and English /  
Environment test in English

**USER INTERFACE**  
Lightning Experience

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## LESSONS & TOPICS

### Salesforce fundamentals

- Explore Salesforce
- Salesforce Architecture

### Administrator responsibilities

- Describe the Role of an Administrator
- Plan for Success

### The Big Picture: All Users

- Company Information and Licensing
- Fiscal Year and Currency
- Organize and Collaborate
- Manage Users
- Login Security Controls

### Feature Access and Object Security

- Profiles
- Permission Sets
- Field-Level Security

### Salesforce Record Access

- Record Ownership
- Organization-Wide Defaults
- Role Hierarchy
- Sharing Rules
- Teams and Manual Sharing
- Restriction Rules

### Customize Standard Functionality

- Object Overview
- Standard and Custom Fields
- Relationship Fields
- Custom Formula Fields

### Customize the Existing User Interface (UI)

- Applications
- Home Page
- Tabs and List Views
- Page Layouts
- Buttons, Links, and Actions
- Record Types, Business Process, and Path

### Create New with Clicks

- Create a New Object
- Dynamic Forms
- Create a New Custom Tab
- Create and Deploy a Change Set
- Mobile Layout

### Declarative Automation

- Automation Fundamentals
- Validation Rules
- Lead and Case Management
- Workflow and Approval Process
- Process Builder

### The Future of Automation: Flow

- Flow Overview
- Build a Flow to Update a Field
- Build and Combine Flows
- Deploy Flow with a Lightning Component
- Order of Execution

### Data Management

- Back Up Data
- Import, Export, and Update Data
- Mass Delete and Mass Transfer
- Data Quality and Cleaning Tools

### Analytics

- Report Components
- Filters and Formulas
- Conditional Formatting and Charts
- Exports and Subscriptions
- Dashboards

### Learn the Foundations of AI

Trailhead Academy classes include a lesson where you'll learn AI concepts, responsible AI practices, and how to use AI and Salesforce together to drive productivity.