Administrative Essentials for New Admins in Lightning Experience + Certification (ADX201C)

Getting Around the App

- Data Model and Navigation
- Lightning Experience
- Help & Training

Getting Your Organization Ready for Users

- Setting Up the Company Profile
- Configuring the User Interface
- Setting Up Activities and Calendars
- Configuring Search Settings
- Setting Up Chatter Groups
- Mobile Access with Salesforce1

Setting Up and Managing Users

- Managing User Profiles
- Managing Users
- Setting Up Chatter Free Users and Invites
- Troubleshooting Login Issues

Security and Data Access

- Restricting Logins
- Determining Object Access
- Setting Up Record Access
- Creating a Role Hierarchy
- Dealing with Record Access Exceptions
- Managing Field-level Security

Object Customizations

- Administering Standard Fields
- Creating New Custom Fields
- Creating Selection Fields: Picklists and Lookups
- Creating Formula Fields
- Working with Page Layouts
- Working with Record Types and Business Processes
- Maintaining Data Quality

Managing Data

- Import Wizards
- Data Loader
- Data.com
- Mass Transfer
- Backing Up Data
- Mass Delete and Recycle Bin

Reports and Dashboards

- Running and Modifying Reports
- Creating New Reports with the Report Builder
- Working with Report Filters
- Summarizing with Formulas and Visual Summaries
- Printing, Exporting, and Emailing Reports
- Building Dashboards

Automation

- Email Templates
- Workflow Rules
- Process Builder
- Lead Automation

Managing the Support Process

- Managing and Resolving Cases
- Customizing a Support Process
- Automating Support
- Understanding the Salesforce Console for Service
- Collaborating in the Service Cloud
- Analyzing Support Data