Sales force ADX-201 Administrator Workshop- 2019

Date of Event: 24th to 28th September, 2019.
Venue: Bill Gates Computer Laboratory, KCG College of Technology.

On September 24th 2019, a 5 Day workshop on Administrative Essentials for New Admins in Lightning Experience (ADX201) in association with ICT Academy, was inaugurated at KCG College of Technology by Head of the Computer Science and Engineering Department - Dr. M. Krishnamurthy, Head of the Information Technology Department Dr J. Frank Vijay along with ICT academy Relationship Manager Mr Dinesh & Resource Person for the 5 day workshop Mr Ravichandran along with others Trainers Graced the occasion.

Dr M. Krishnamurthy Head - CSE, Enlightened students the Purpose of this workshop being conducted for Final Years and the Objectives of this workshop was cited by him. He also emphasised students to learn the cloud technology skills to make them on par with industry standards. Last but Not Least Dr J. Frank Vijay concluded the inaugural of the event with vote of thanks and also shared his bright ideas on cloud technology and the importance of it with respect to industry Revolution 4.0

Extensive and interactive, Administrative Essentials for New Admins in Lightning Experience is the core training that ensures your success with Sales force Lightning. It's a must for new administrators, and highly recommends in completing the course before starting a Sales force deployment or when taking over an existing deployment.

Students have learnt these following things in Sales force CRM Platform

➤ Customize your application, including page layouts, fields, tabs, and business processes in Lightning Experience.
➤ Learn how security settings created in Sales force Classic are applied in Lightning.
➤ Maintain and import clean data in Lightning.
➤ Use Lightning features to create high-value reports and dashboards
➤ Understand how workflow automation complies with Lightning.

Lessons and Topics Covered extensively during the 5 days workshops are as follows

- 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: Pick lists 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 Sales force Console for Service

- Collaborating in the Service Cloud
- Analyzing Support Data

Three Super Badge Details:

1. **Business Administration Specialist**

   Things Earned by executing this Superbadge1

   - Clean and import account data
   - Create users and manage access
   - Create email templates for new marketing needs
   - Configure UI tools for a new product type
   - Create reports and dashboards
   - Manage and apply Chatter tools

2. **Lightning Experience Reports & Dashboards Specialist**

   Things Earned by executing this Superbadge2

   - Administer report and dashboard visibility and access
   - Apply report types and fields
   - Design a record filtering strategy
   - Create and surface report charts and dashboards
   - Apply buckets, groups, and custom summary formulas
   - Create dashboard components

3. **Security Specialist**

   Things Earned by executing this Superbadge3

   - Set object-level security settings to control which users can access which objects
   - Set record-level security settings to control which users can create and edit specific records
   - Set appropriate password policies to comply with security best practices
   - Track field-level changes to meet data retention requirements
   - Set report, dashboard, and public list view security settings to grant appropriate privileges to users
   - Set up two-factor authentication to enhance user login security
   - Describe capabilities to track changes to Sales force settings

Students actively participated in this workshop and enjoyed earning the super badges. Details of the Students Badges are attached for your perusal. Total number of Students Participated is 58 and the Total number of Students who cleared all 3 super Badges is 24.The Workshop came to an end on 28th September 2019 3.35 PM where the closing words were from our Principal & HoD - CSE about the Technology shift and the Need to adopt this CRM technique to equip the students in cloud platform.

ADX -201_KCG.xlsx

Coordinators:

Mr S. Prabakeran, Assistant Professor Senior Scale, Department of CSE

Dr R. Anand, Associate Professor, Department of IT

Glimpses of the Event