

Salesforce Lightning Interface

This Salesforce Lightning training was designed as user training to help take the weight off Salesforce administrators. After completing this Salesforce Lightning Interface training, your users will know how to navigate and personalize Salesforce Lightning and perform common and essential tasks, such as interacting with the navigation bar, creating and managing accounts, working with leads and opportunities, and much more.

[CBT Nuggets course material](#) →

WEEK 1

Transition to Salesforce Lightning for Business Users 152 min.

Welcome to Salesforce Lightning	3
Day in the Life of a Lightning User	7
Everyday Actions, The Lightning Way	3
Home Tab: Two New Efficiency Tools	5
Home Tab: What Else Is New?	5
Navigate Lightning Apps	4
Navigate Object Tabs: Familiar Actions the Lightning Way	5
Working with List Views in Salesforce Lightning	9
Working with Kanban Views in Lightning	11
List View for Data Cleanup	6
Opportunity Workspace	5
Working with Path in Lightning	5
Manage Accounts and Contacts in Lightning	5
Relate Contacts to Multiple Accounts	4
Lead Workspace: Create to Convert	12
Navigate Tasks in Lightning	5
Working with the Calendar in Lightning	4
What Is New on Lightning Reports and Dashboards?	5
Getting Started with the Salesforce Mobile App	6

Salesforce Lightning for Business Users

Overview	1
A Day in the Life of a Salesforce User	7
Tour Lightning Tabs and Navigation Bar	5
The Salesforce Data Model	4
Where is my data in Salesforce?	9

Create and Manage Accounts in Salesforce	8
Add Contacts Related to Accounts	8

WEEK 2

158 min.

What is a Lead in Salesforce?	3
Work Your Leads!	10
Convert a Lead	10
Create an Opportunity	11
Master the Opportunity Workspace	10
Use Path to Work your Opportunities	4

Navigate and Personalize Salesforce Lightning

Overview	1
Manage Your Day From the Lightning Home Tab	6
Tips for Using Lightning Search	5
Create a Custom List View	9
Working with Kanban Views	10
Working with Tasks in Salesforce Lightning	5
Capture Critical Notes in Salesforce	3
Relate Contacts to Multiple Accounts	4
Getting Started with the Salesforce Mobile App	6
Tips on using the Calendar in Lightning	4
What else can the Salesforce calendar show?	3
Personalize your Profile and Photo	2
Personalize your Salesforce Settings	6

Configure Core Lightning Features

Overview	1
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Working with the Salesforce Lightning Home Layout	4
Configuring Custom Home Layouts	12
Creating Apps in Salesforce Lightning	9
Working with the Account and Contact Lightning Record Page	10
Customizing Opportunity and Lead Lightning Page Layouts	8

WEEK 3

105 min.

Adding Items to the Utility Bar	8
Leveraging Notes in Lightning	4
Enabling Notes in Salesforce Lightning	8

Configure Path in Salesforce Lightning

Overview	1
Adapting Path in Salesforce Lightning for Your Business Processes	5
Configuring Business Processes to Prepare for Path	8
Creating Record Types to Support Business Processes and Path	5
Securing Helpful In-Context Guidance for Users in Path	3
Building Custom Path Records	7
Customizing Path Defaults for a Speedy Rollout	11

Manage Actions in Salesforce Lightning

Overview	1
Understanding Global Quick Actions	7
Adding and Removing Actions from the Global Actions Menu	7

Configuring Page-Level Quick Actions	7
Demystifying Object-Level Actions in Lightning	6
Making the Case for Custom Actions on Objects	9
Configuring Follow-Up Actions on the Activity Timeline	5