

Administer, Extend, and Automate Salesforce (ADX211)

ID ADX211 Price on request Duration 4 days

Who should attend

Administration Essentials for Experienced Admins is designed for:

- Administrators with at least six months of experience using Salesforce; and/or Administrators who have completed the Administration Essentials for New Admins course

This course is part of the following Certifications

Salesforce Certified Advanced Administrator (SFCAA)

Course Objectives

- Determine and implement appropriate data access and visibility settings
- Manage configuration changes in a sandbox environment and move data between environments using change sets
- Extend the functionality of your implementation with custom objects and apps
- Extend your reporting to provide up-to-date views of your business
- Customize the Salesforce1 app and create quick actions to increase efficiency
- Improve data quality so that the ongoing task of data maintenance is not so overwhelming
- Implement complex business processes using work flow rules, processes, approval processes, and flows.

Course Content

Troubleshoot Record Access and Field Visibility

- Troubleshoot record access
- Understand the impact of territory management on the sharing model
- Manage field visibility

Change Management

- Manage changes in a sandbox
- Deploy changes using change sets

Extend Salesforce with Custom Objects and Apps

- Build custom objects, tabs, and apps
- Create relationships between objects
- Use delegated administration

Extend Reporting

- Create custom report types
- Build exception reports with cross filters
- Categorize report data with bucketing
- Extend summaries in reports and dashboards
- Display multiple views of data using joined reports
- Analyze data over time with historical trending and reporting snapshots

Increase Efficiency with Salesforce1 and Quick Actions

- Customize the Salesforce1 mobile app
- Create object-specific quick actions
- Creating global quick actions

Improve Data Quality

- Assess, cleanse, and maintain data quality
- Prevent duplicate records using Duplicate Management
- Clean and enrich data with data.com

Automate Complex Business Processes

- Use validation rules, formula fields, workflow rules, and processes to enforce and automate business processes

Streamline Requests with Approval Processes

- Manage approval processes
- Troubleshooting approval processes

Increase Productivity with Visual Workflow

- Understand use cases for Visual Workflow
- Build and deploy a flow

Extend and Troubleshoot Business Process Automation

- Understand when to use Apex and Visualforce for extending business process automation.
- Understand the order of execution for automated processes.

- Use debug logs to troubleshoot business process issues.

Training Centres worldwide



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