Fast Lane

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)
Salesforce Certified Sales Cloud Consultant (SFCSCC)

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

- Managechanges 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

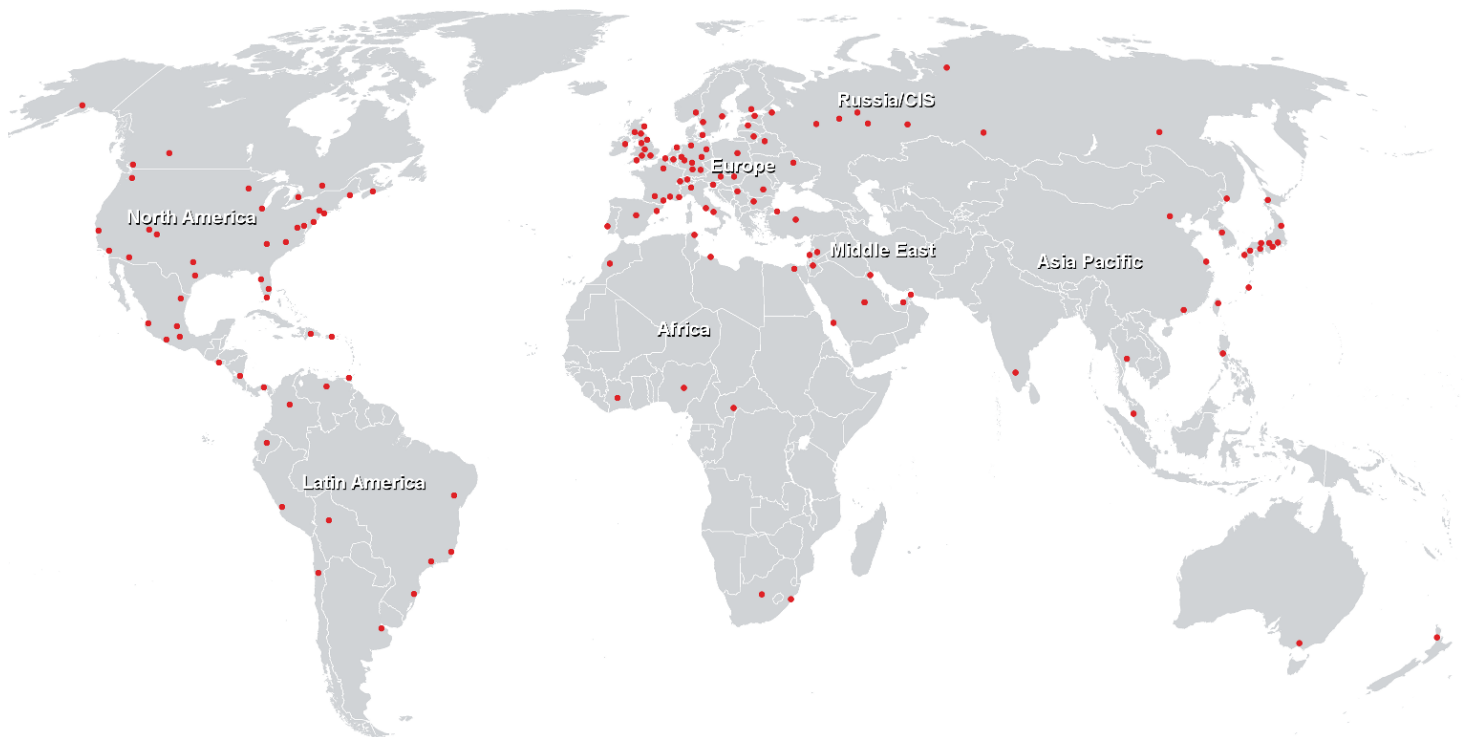### Extend and Troubleshoot Business Process Automation

- 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.

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Training Centres worldwide

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