Administer, Extend, and Automate Salesforce

Varighed: 4 Days   Kursus Kode: ADX-211   Leveringsmetode: Virtuel deltagelse

Beskrivelse:

Take your Salesforce Administrator skills to the next level and supercharge your knowledge to solve pressing business needs. In this 4-day class, discover how to extend Salesforce with custom objects and Lightning apps, generate complex reports and dashboards, and automate complex business requirements to work more efficiently. Our Salesforce experts will share tips and best practices to take your admin skills to the next level and arm you with the skills to get more out of Salesforce.

Målgruppe:

This class is ideal for admins with at least 6 months of experience administering Salesforce, and is a great foundational course for anyone looking to earn their Salesforce Advanced Administrator credential.

Agenda:

- When you complete this course, you will be able to:

- 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 Salesforce mobile 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 workflow rules, Process Builder, approval processes, and flows.

Indhold:

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

Custom Objects and Apps

- Build Custom Objects, Tabs, and Apps
- Create Relationships Between Objects
- Use Delegated Administration

Advanced 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

Salesforce Mobile App and Quick Actions

- Customize the Salesforce Mobile App
- Create Object-Specific Quick Actions
- Create Global Quick Actions

Data Quality

- Assess, Cleanse, and Maintain Data
- Prevent Duplicate Records Using Duplicate Management

Automated Business Processes

- Use Validation Rules, Formula Fields, Workflow Rules, and Process Builder to Enforce and Automate Business Processes

Approval Processes

- Manage Approval Processes
- Troubleshoot Approval Processes

Visual Workflow

- Understand Use Cases for Visual Workflow
- Build and Deploy a Flow

Advanced 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

Flere Informationer:

For yderligere informationer eller booking af kursus, kontakt os på tlf.nr.: 44 88 18 00

training@globalknowledge.dk

www.globalknowledge.com/da-dk/

Global Knowledge, Stamholmen 110, 2650 Hvidovre