

Administer, Extend, and Automate Salesforce

Duration: 4 Days Course Code: ADX-211

Overview:

Take your Salesforce Administrator skills to the next level! Supercharge your knowledge in this 4-day class by creating and implementing solutions for pressing business needs. Discover how to extend Salesforce with custom objects and Lightning apps. Become an automation champion by designing and creating complex flows, and increase efficiency by generating advanced reports and dashboards. Our Salesforce experts will share tips and best practices to take your admin skills to the next level, giving you the skills you need to get more out of Salesforce.

Target Audience:

This class is ideal for current admins who hold the Salesforce Certified Administrator credential or have at least 6 months of experience administering Salesforce. This class is a great foundational course for individuals looking to earn their Salesforce Advanced Administrator credential or deepen their understanding and capabilities within Salesforce.

Objectives:

- Troubleshoot and modify complex security models based on business requirements.
 - Identify the relationship types available in Salesforce and when each should be used.
 - Modify a Lightning app to meet business needs.
 - Increase data quality with advanced validation rules and formula functions.
 - Utilize Flow to solve business problems and increase productivity.
 - Troubleshoot flow errors stemming from the Order of Execution and invalid data inputs.
 - Plan and create an Approval Process.
 - Utilize the Order of Execution to explain why automations are running at specific times.
 - Determine when to configure, buy, or extend Salesforce.
 - Utilize advanced reporting techniques to analyze data.
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Content:

Securing Your Data

- Accessing the Org
- Object Permissions
- Impact of Sharing
- Delegated Administration

Objects, Fields, and Relationships

- Create Custom Objects
- Customize Fields
- Master Detail and Lookup Relationships
- Many to Many Relationships
- Benefits of Relationship Fields
- Additional Relationship Types

Increasing Efficiency with Lightning Apps

- Building Lightning Applications
- Selecting Tabs
- Page Layout Editor
- Applying Quick Actions
- Record Type ; Business Process

Improve Data Quality

- Data Quality Lifecycle
- Enforcing Data Quality
- Validation Rules ; Formula Functions
- Eliminate Duplicates

Salesforce Flow

- Identifying the Right Automation Tool
- Flow Overview
- Migrating to Flow
- Flow and the Order of Execution

Flow: Building From Scratch

- Building a Flow: The Basics
- Building a Flow: Resources ; Elements
- Collection Management
- Creating a Flow
- Record-Triggered Flow
- Schedule-Triggered Flow
- Screen Flow
- Autolaunched Flow

Flow: Considerations ; Troubleshooting

- Considerations
- Limitations
- Troubleshooting

The Approval Process

- What Is an Approval Process
- Create an Approval Process
- Troubleshoot an Approval Process

Audit and Extend Automations

- The Order of Execution
- Auditing Tools
- Extending Beyond Automations

Advanced Reporting

- Creating Custom Report Types
- Exception Reports with Cross Filters
- Bucketing Data
- Historical Reporting
- Extending Summaries in Reports and Dashboards

Further Information:

For More information, or to book your course, please call us on Head Office 01189 123456 / Northern Office 0113 242 5931

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