

## Administer, Extend, and Automate Salesforce

**Duration: 4 Days**    **Course Code: ADX-211**    **Delivery Method: Virtual Learning**

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### 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.

### Virtual Learning

This interactive training can be taken from any location, your office or home and is delivered by a trainer. This training does not have any delegates in the class with the instructor, since all delegates are virtually connected. Virtual delegates do not travel to this course, Global Knowledge will send you all the information needed before the start of the course and you can test the logins.

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### 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.

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### 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

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## Further Information:

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

[info@globalknowledge.co.uk](mailto:info@globalknowledge.co.uk)

[www.globalknowledge.com/en-gb/](http://www.globalknowledge.com/en-gb/)

Global Knowledge, Mulberry Business Park, Fishponds Road, Wokingham Berkshire RG41 2GY UK