ADMINISTER, EXTEND, AND AUTOMATE SALESFORCE (ADX211)

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.

WHO SHOULD TAKE THIS COURSE?

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.

WHEN YOU COMPLETE THIS COURSE, YOU WILL BE ABLE TO:

- 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.

DURATION
4 days

DELIVERY FORMAT
- Classroom
- Virtual

LANGUAGE
Course in French /
Materials in English

USER INTERFACE
Lightning Experience

PREREQUISITES AND PREWORK

To attend ADX211, you must have at least six months of experience using Salesforce; and/or have completed the Administrative Essentials for New Admins course.

Please complete the following trailmix before attending our expert-led class:
Trailmix, Trailhead Academy

IMPORTANT : If you use your personal computer and a configuration is described in the Computer Setup Guide, you must complete it before attending the class.

CERTIFICATION

ADX211 is recommended to prepare Salesforce Certified Advanced Administrator exam. Other courses and self-study materials are recommended for this exam. The complete list of prerequisites is provided by Salesforce in the Exam Guide. Registration for an inter-company training session entitles you to a voucher to pass the corresponding certification exam. The voucher, valid for 6 to 12 months, is sent to the trainee on request, at no additional cost. Note that this offer is valid for only one voucher per certification; If you register for multiple courses preparing for the same certification, you will be entitled to only one free voucher.

Note :

- Salesforce certification exam doesn't take place during the training and it's up to the delegate to register to the exam via the webassessor
- We don't recommend passing the Salesforce certification exam directly after attending the course. Additional work must be provided

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LESSONS & TOPICS

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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