



Salesforce Service Cloud (Administrator)

ADM211: Salesforce Administration Essentials for Experienced Admins

Comprehensive and hands-on, this course is for administrators who are ready to significantly ramp up their skills and knowledge about using Salesforce to solve their most pressing business needs.

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- 4 Days

Upcoming Dates

Course Description

This 4-day Salesforce Admin course uses real-world scenarios, Administration Essentials for Experienced Admins covers topics such as extending Salesforce with custom objects and apps, generating complex reports and dashboards, and automating complex business processes to help you work more efficiently and get more out of Salesforce.

Course Outline

Troubleshoot 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

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.

Audience

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

Prerequisites

It is recommended that you have a solid understanding of basic Salesforce concepts and functionality. In addition, you should have completed the following online courses, which are available at help.salesforce.com:

- Getting Started: Navigating Salesforce
- Getting Started: Using the Sales Cloud

What You Will Learn

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 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.