Administer, Extend, and Automate Salesforce (ADX211)

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 Salesforce Mobile App and Quick Actions

- Customize the Salesforce 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 Lightning Data

Automate Complex Business Processes

- Use validation rules, formula fields, workflow rules, and Process Builder 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, Lightning Components, and Visualforce for extending business process automation.

- Understand the order of execution for automated processes.

- Use debug logs to troubleshoot business process issues.