

# ADMINISTRATION ESSENTIALS FOR EXPERIENCED ADMINS



## OVERVIEW

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. Using 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.

## WHO SHOULD TAKE THIS COURSE?

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

## 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 Salesforce mobile 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 workflow rules, Process Builder, approval processes, and flows.



### DURATION

- 4 days

### DELIVERY FORMAT

- Classroom
- Virtual Classroom

### CERTIFICATION

Administration Essentials for Experienced Admins is recommended as preparation for the Salesforce Certified Advanced Administrator exam.

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## MODULES & TOPICS

### 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

### 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 and Visualforce for extending business process automation.
- Understand the order of execution for automated processes.
- Use debug logs to troubleshoot business process issues.



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