

# Salesforce - Administration Essentials for Experienced Administrators (ADM 211)

---

<b>Code:</b>	ADM-211
<b>Length:</b>	4 days
<b>URL:</b>	<a href="#">View Online</a>

---

This course is for experienced administrators who are ready to increase their skills and knowledge about how Salesforce can 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 from Salesforce.

## Skills Gained

- 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, custom apps, and the AppExchange.
- Improve data quality so that the ongoing task of data maintenance is not so overwhelming.
- Extend your analytics to provide up-to-date views of your business.
- Implement complex business processes using workflow rules, approval processes, and Visual Workflow.

## Who Can Benefit

This hands-on course is designed for experienced administrators who have used Salesforce for 6 months and/or have completed the Administration Essentials for New Admins course.

## Prerequisites

Familiarity with Salesforce for at least 6 months.

## Course Details

### Troubleshoot Record Access and Field Visibility

- Troubleshooting Record Access
- Understanding the Impact of Territory Management on the Sharing Model
- Managing Field Visibility

### Change Management

- Managing Changes in a Sandbox
- Deploying Changes Using Change Sets

### Extend Salesforce with Custom Objects and Apps

- Building Custom Objects, Tabs, and Apps
- Creating Relationships Between Objects
- Using Apps from the AppExchange

## **Extend Analytics**

- Creating Custom Report Types Building Exception Reports with Cross Filters
- Categorizing Report Data with Bucketing
- Extending Summaries in Reports and Dashboards
- Displaying Multiple Views of Data Using Joined Reports
- Analyzing Data Over Time with Analytic Snapshots

## **Improve Data Quality**

- Assessing, Cleansing, and Maintaining Data Quality
- Merging Duplicate Records
- Cleaning and Enriching Data with Data.com

## **Automate Complex Business Processes**

- Creating Formulas and Workflow Rules to Enforce Business Processes
- Troubleshooting Business Process Execution Issues
- Understanding When Business Process Automation Must Be Extended Using Programmatic Means

## **Streamline Requests with Approval Processes**

- Managing Approval Processes
- Troubleshooting Approval Processes

## **Increase Productivity with Visual Workflow**

- Understanding Use Cases for Visual Workflow
- Building and Deploying a Flow