

# ADMINISTER, EXTEND, AND AUTOMATE SALESFORCE (ADX211)



## OVERVIEW

Take your Salesforce Administrator skills to the next level! Supercharge your knowledge in this 4-day instructor-led course 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 is also a great foundational course for anyone interested in earning their Advanced Administrator credential.

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

- Troubleshoot 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

### Data Security

- Access the Org
- Enable Object Permissions
- Determine the Impact of Sharing
- Delegate Administration

### Objects, Fields, and Relationships

- Create Custom Objects
- Customize Fields
- Build Master Detail and Lookup Relationships
- Determine Benefits of Relationship Fields
- Implement Additional Relationship Types

### Efficiency with Lightning Apps

- Build Lightning Applications
- Select Tabs
- Understand Page Layout Editor
- Apply Quick Actions
- Follow Record Type & Business Process

### Data Quality

- Follow the Data Quality Lifecycle
- Enforce Data Quality
- Follow Validation Rules & Formula Functions
- Eliminate Duplicates

### Salesforce Flow

- Identify the Right Automation Tool
- Understand Flow
- Migrate to Flow
- Implement Flow and the Order of Execution

### Flow: Building From Scratch

- Build a Flow: The Basics
- Build a Flow: Resources & Elements
- Manage Collection
- Create a Flow

### Flow: Considerations & Troubleshooting

- Assess Considerations
- Determine Limitations
- Troubleshoot

### The Approval Process

- Define an Approval Process
- Create an Approval Process
- Troubleshoot an Approval Process

### Automation Audit and Extensions

- Follow The Order of Execution
- Harness Auditing Tools
- Extend Beyond Automations

### Advanced reporting

- Create Custom Report Types
- Generate Exception Reports with Cross Filters
- Bucket Data
- Conduct Historical Reporting
- Extend Summaries in Reports and Dashboards