



DAY ONE

Introductions

Welcome to AW Computing

Exercise 1-1: Update Your Chatter Profile

Exercise 1-2: Create a Sandbox

Change Management

- Managing Changes in a Sandbox
 - Exercise 2-1: Configure Changes in a Sandbox*
 - Exercise 2-2: Test Changes in a Sandbox*
- Deploying Changes using Change Sets
 - Exercise 2-3: Deploy Changes Using Change Sets*

Extend Salesforce with Custom Objects and Apps

- Creating Custom Objects and Tabs
 - Exercise 3-1: Create a Shipment Object*
 - Exercise 3-2: Set Shipment Record Access*
- Creating Relationships between Objects
 - Exercise 3-3: Create a New Relationship*
 - Exercise 3-4: Create a New Relationship (cont.)*
- Creating Custom Apps
 - Exercise 3-5: Create a Shipments Custom App*
 - Exercise 3-6: Test the Shipments App*

Improve Data Quality

- Improving Data Quality: Missing Data
 - Exercise 4-1: Analyze Missing Lead Data*
 - Exercise 4-2: Cleanse and Enforce Missing Lead Data*
- Improving Data Quality: Duplicates
 - Exercise 4-3: Prevent Duplicate Leads*



DAY TWO

Extend Reporting

- Creating Custom Report Types to Extend Reporting
Exercise 5-1: Create a CRT for “With or Without” Reports
Exercise 5-2: Build a Report Using a CRT
- Building Exception Reports with Cross-Filters
Exercise 5-3: Create an Exception Report
- Categorizing Report Data with Bucket Fields
Exercise 5-4: Add Bucket Fields to a Report
- Extending Summaries in Reports and Dashboards
Exercise 5-5: Calculate a Moving 3-Week Average

Automate Complex Business Processes

- Identifying the Right Automation Tools
- Using Validation Rules and Formula Fields to Automate a Business Process
Exercise 6-1: Use a Validation Rule and Formula Fields to Automate a Business Process
- Using Workflow Rules to Automate a Business Process
Exercise 6-2: Create Workflow Actions and a Workflow Rule
Exercise 6-3: Test the New B2B Opportunity Automation

Streamline Requests with Approval Processes

- Managing Approval Processes
Exercise 7-1: Create a Discount Approval Process
- Troubleshooting Approval Processes



DAY THREE

Security and Record Access

- Implications to Record and Field Data Access
- *Discussion and Analysis:*
Overview of topics, including: sharing model, controlled by parent, grant access by hierarchies, profile vs. sharing rules, portal/communities security settings, field and record level access, sharing rules, field level security, and record types

Extending Custom Objects and Applications

- Appropriate Use of Relationship Types When Building Custom Objects
- *Discussion and Analysis:*
Overview of topics, including: master-detail, lookup

Auditing and Monitoring

- Appropriate Tools for Monitoring and Troubleshooting System Activity
- *Discussion and Analysis:*
Overview of topics, including: debug log, set up audit trail

Sales Cloud Applications

- Customize and Maintain Sales Cloud Applications
- *Discussion and Analysis:*
Overview of topics, including: products, price books, schedules, and quotes
- Describe the Capabilities of Forecasting
- *Discussion and Analysis:*
Overview of topics, including: categories, hierarchy, and quotas

Service Cloud Applications

- Create and Maintain Salesforce Knowledge
- *Discussion and Analysis:*
Overview of topics, including: article types, data categories
- Service Entitlements and Entitlement Processes
- *Discussion and Analysis*
- Features of Salesforce Which Enable Interaction Between Support Agents and Customers
- *Discussion and Analysis:*
Overview of topics, including Live Agent, Case Feed, Service Cloud Console, and portals/communities



Data Management

- Tools and Best Practices for Improving and Enriching Data Quality
- *Discussion and Analysis:*
Overview of topics, including: validation, managing duplicates, enriching, and archiving

Content Management

- Set Up and Maintain Salesforce Content
- *Discussion and Analysis*

Content Management

- Options Available to Move Metadata Between Environments
- *Discussion and Analysis:*
Overview of topics, including: change sets, Force.com IDE
- Capabilities and Best Practices for Using Change Sets to Move Metadata Between Environments
- *Discussion and Analysis*

Analytics, Reports, and Dashboards

- Determination of the Appropriate Analytic Tools to Meet Complex Reporting Requirements
- *Discussion and Analysis:*
Overview of topics, including: custom report types, analytic snapshots, complex charting, custom summary formulas, bucketing, joined reports, cross-filters, dynamic dashboards, and dashboard filters

Process Automation

- Troubleshoot an Approval Process
- *Discussion and Analysis*
- Solutions Using a Combination of Automation Tools to Solve a Business Problem
- *Discussion and Analysis:*
Overview of topics, including: workflow rules, approval processes, formula fields, and when to use Visualforce and Apex triggers

Practice Test

- Practice Test and Question Discussion

AGENDA

Advanced Administrator Bootcamp



DAY FOUR

Curated Advanced Administrator Content at TrailheaDX

- Session list coming soon

DAY FIVE

Curated Advanced Administrator Content at TrailheaDX

- Session list coming soon