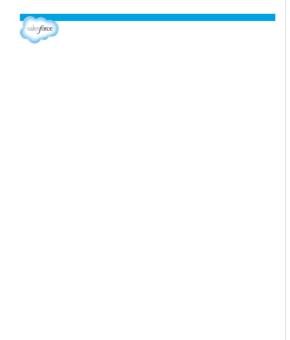WelcometoAWComputingExerciseGuide

**Administration Essentials
for Experienced Admins
(Enterprise and Unlimited
Editions)**

Module 1: Welcome to AW Computing
Exercise Guide

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Exercise 1-1: Update Your Chatter Profile

Goal:

Update your Chatter profile.

Tasks:

1. Log in to the AW Computing organization.
2. Update your Chatter profile with your name and email.

Time:

5 minutes

_____

Instructions:

1. Log in to the AW Computing organization.

   A. **URL:** login.salesforce.com
   B. **User Name:** (username)
   C. **Password:** (password)
   D. Click **Log in to Salesforce.**

2. Update your Chatter profile with your name and email.

   A. Click **Admin User | My Profile.**
   B. Click the pencil icon next to Contact.
   C. Enter your email information.

      i. **Email:** (your personal email)

   D. Click the About tab and enter your name information.

      i. **First Name:** (your first name)
      ii. **Last Name:** (your last name)

   E. Click **Save All.**

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Exercise 1-2: Create a Sandbox

Goal:
Create a sandbox to configure and test changes separate from the production environment.

Task:
Create a developer pro sandbox named TestOrg.

Time:
5 minutes

Instructions:

1. Create a developer pro sandbox named TestOrg.

   A. Click **Setup | Sandboxes.**
   B. Click **New Sandbox.**
   C. Enter the details for the sandbox.

      i. **Name:** TestOrg
      ii. **Description:** Sandbox used to configure and test changes

   D. In the Developer Pro section, click **Create.**

   Note: The time it takes to complete the copy will depend on the length of the queue at the time requested. You will receive an email letting you know when it has been completed.

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Exercise 1-3: Review the Sharing Model

Goal:
Become familiar with the sharing model for AW Computing.

Task:
Use the AW Computing organization to answer questions about the sharing model.

Time:
20 minutes

Questions:

1. What users are assigned to the Executive User profile?

   _____
   _____
   _____
   _____
   _____

2. What position object permissions are enabled in the Executive User, Recruiting User, and Sales User profiles?

   _____
   _____
   _____
   _____
   _____

3. What are the organization-wide defaults for accounts, contacts, leads, and campaigns?

   _____
   _____
   _____
   _____
   _____

4. What are the organization-wide defaults for opportunities, cases, and positions?

   _____
   _____
   _____
   _____

5. What roles are below the VP of Global Sales/Sales Ops role in the role hierarchy?

_____
_____
_____
_____
_____

6. What users are assigned to the VP of Global Sales/Sales Ops role?

_____
_____
_____
_____
_____

7. What sharing rules open up access to position records?

_____
_____
_____
_____
_____

8. Does the organization use account teams, opportunity teams, and case teams?

_____
_____
_____
_____
_____

9. Does the organization allow users to manually share opportunities?

_____
_____
_____
_____
_____

Answers for 1-3: Review the Sharing Model

1: What users are assigned to the Executive User profile?

Allison Wheeler, Conner McCoy, John Wiseman, Brent Bassi, Ling Wu, Noah Larkin

2: What position object permissions are enabled in the Executive User, Recruiting User, and Sales User profiles?

Executive User: Read, Create, Edit
Recruiting User: Read, Create, Edit, Delete
Sales User: Read, Create, Edit

3: What are the organization-wide defaults for accounts, contacts, leads, and campaigns?

Public Read Only

4: What are the organization-wide defaults for opportunities, cases, and positions?

Private

5: What roles are below the VP of Global Sales/Sales Ops role in the role hierarchy?

APAC Sales Director, APAC Sales Rep, EMEA Sales Director, EMEA Sales Rep, Sales Eng. Director, Sales Engineers, US Sales Director, US Sales Rep

6: What users are assigned to the VP of Global Sales/Sales Ops role?

Allison Wheeler, Yuko Ishikawa, Courtney Brown, Tony Jenkins

7: What sharing rules open up access to position records?

Position: Status EQUALS Open is shared with Group: VPs with an access level of Read Only.
Owner in Entire Organization is shared with Role and Subordinates: VP of Human Resources with an access level of Read/Write.

8: Does the organization use account teams, opportunity teams, and case teams?

Yes, account teams and opportunity teams are enabled in the organization. In addition, the Account Team related list is visible on the page layout for accounts. The Opportunity Team related list is visible on the page layout for opportunities. The Case Team related list is visible on the page layout for cases.

9: Does the organization allow users to manually share opportunities?

Yes, the Sharing button is visible on the opportunity page layouts.

Appendix: Sharing Model for AW Computing

Profiles

Sales User
Sales Operations
Sales Directors
Sales Reps
Sales Eng Directors
Sales Engineers

General Marketing User
Marketing Directors
Marketers

Executive User
CEO
VP of Global Sales
VP of Finance
VP of Services
VP of Marketing
VP of Human Resources

Support User
Customer Support Directors
Customer Support Reps

Recruiting User
Human Resources Directors
Human Resources

Accounts Receivable User
Finance Directors
Accounts Receivable

System Administrator
Salesforce Admin

Object Permissions

Sales User

Objects & Tabs	Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓
Contacts	✓	✓	✓	✓
Leads	✓	✓	✓	✓
Campaigns	✓			
Opportunities	✓	✓	✓	✓
Cases	✓	✓	✓	
Solutions	✓			
Candidates	✓			
Interviewers	✓	✓	✓	
Job Applications	✓			
Positions	✓	✓	✓	

Support User

Objects & Tabs	Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓
Contacts	✓	✓	✓	✓
Leads	✓			
Campaigns	✓			
Opportunities	✓			
Cases	✓	✓	✓	✓
Solutions	✓	✓	✓	✓
Candidates	✓			
Interviewers	✓	✓	✓	
Job Applications	✓			
Positions	✓	✓	✓	

General Marketing User

Objects & Tabs	Read	Create	Edit	Delete
Accounts	✓	✓	✓	
Contacts	✓	✓	✓	✓
Leads	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓
Opportunities	✓			
Cases	✓	✓	✓	
Solutions	✓			
Candidates	✓			
Interviewers	✓	✓	✓	
Job Applications	✓			
Positions	✓	✓	✓	

Recruiting User

Objects & Tabs	Read	Create	Edit	Delete
Accounts				
Contacts				
Leads				
Campaigns				
Opportunities				
Cases	✓	✓	✓	
Solutions				
Candidates	✓	✓	✓	✓
Interviewers	✓	✓	✓	✓
Job Applications	✓	✓	✓	✓
Positions	✓	✓	✓	✓

Executive User

Objects & Tabs	Read	Create	Edit	Delete
Accounts	✓	✓	✓	
Contacts	✓	✓	✓	
Leads	✓	✓	✓	
Campaigns	✓	✓	✓	
Opportunities	✓	✓	✓	
Cases	✓	✓	✓	
Solutions	✓	✓	✓	
Candidates	✓	✓	✓	
Interviewers	✓	✓	✓	
Job Applications	✓	✓	✓	
Positions	✓	✓	✓	

Accounts Receivable User

Objects & Tabs	Read	Create	Edit	Delete
Accounts	✓		✓	
Contacts	✓	✓	✓	
Leads	✓			
Campaigns	✓			
Opportunities	✓		✓	
Cases	✓	✓	✓	
Solutions	✓			
Candidates	✓			
Interviewers	✓	✓	✓	
Job Applications	✓			
Positions	✓	✓	✓	

Organization-Wide Defaults

Objects	Default Internal Access
Account, Contract and Asset	Public Read Only
Contact	Public Read Only
Lead	Public Read Only
Campaign	Public Read Only
Opportunity	Private
Case	Private
Candidate	Private
Interviewer	Private
Job Application	Controlled by Parent
Position	Private

Role Hierarchy