**Salesforce Advanced Admin Exam Study Guide: Topic 10 - Deploying and Managing Applications (10%)**

**Salesforce Basics: For Advanced Admin Newbies**

If you're leveling up to Advanced Admin or just joining this epic ride, don't sweat it—here's a massive, welcoming intro to get you jazzed, comfy, and ready to dive in.

- **What is Salesforce Advanced Admin?**

    o It's the pinnacle of Salesforce mastery—an online platform where you turn your org into a polished, enterprise-ready beast, mastering advanced security, data, changes, analytics, custom objects, content, automation, mobile, service, and app deployment, all in the cloud with no tech meltdowns needed.

    o Picture it as your business's rollout rockstar—like a brilliant stage manager who deploys new features and keeps the show running smoothly, building on your basic Admin skills to launch and maintain apps like a pro.

- **Why It's a Total Win**:

    o It goes beyond tweaking objects—like adding fields—and dives into deploying and managing apps: moving changes to production, installing packages, and keeping everything humming. It's like upgrading from assembling a model to launching a rocket—your team gets new tools without a hitch.

    o As an Advanced Admin, you're the deployment guru—shipping updates and managing apps, like teaching a super-smart robot to roll out enhancements while keeping the org stable.

- **Key Words to Start With**:

    o **Org**: Your company's Salesforce galaxy—like your team's high-tech stage where apps launch and shine.

    o **Setup**: The control hub (top-right gear icon) where you deploy—like the launchpad of your Salesforce spaceship, giving you the tools to push and manage apps.

    o **CRM**: Customer Relationship Management—the core of Salesforce, now with advanced deployment tricks to keep it evolving.

- **What This Topic Is All About**:

o   "Deploying and Managing Applications" is your deep dive into rolling out changes—using sandboxes, change sets, packages, and app management to deliver and maintain functionality. It's like being the captain of your org's deployment crew, ensuring every update lands perfectly.

## Overview

"Deploying and Managing Applications" (10%) is a vital piece of the Advanced Admin exam—it's about mastering the art of moving customizations to production, installing third-party apps, and managing their lifecycle. You'll go beyond sandbox testing, handling enterprise-scale deployments. It's 10% of the exam—a solid chunk—because smooth rollouts and app management keep orgs thriving.

## Exam Weight

- **Percentage**: 10%

- **Why It Matters**: Botched deployments crash systems—broken apps, lost data, or user chaos hurt productivity. With 10%, it's a critical skill for delivering updates in real-world orgs.

## Objectives (In Super-Simple Terms)

- Learn how to deploy changes—like a new app—from sandbox to production without breaking stuff.

- Figure out how to install apps—like "DocuSign"—from the AppExchange safely.

- Get comfy managing apps—like updating or removing them—to keep the org clean.

- Understand how to plan rollouts—like testing first—so users love the changes.

## Structure of the Study Guide

- **Definitions**: Big, clear explanations of key terms.

- **Categories**: Topics split into digestible pieces.

- **Bullet Points**: Massive, beginner-friendly summaries with heaps of detail.

- **Tables**: Side-by-side comparisons to keep it simple.

- **Practical Scenarios**: Tons of real-world examples you can picture doing.

- **Study Tips**: Step-by-step ways to nail this.

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**Definitions (Huge Summaries with Tons of Beginner Details)**

- **Change Set**:
  - **What It Is**: A package—like "New Fields + Flow"—to move changes from sandbox to production.
  - **Details**: Think of it as your moving van—it bundles customizations (e.g., "Case Layout") and ships them between orgs via point-and-click. It's like mailing a box of updates—Advanced Admins use it for controlled rollouts.

- **AppExchange**:
  - **What It Is**: A marketplace—like "Salesforce App Store"—for third-party apps.
  - **Details**: This is your app shop—it's where you grab pre-built tools (e.g., "Conga Composer") to extend Salesforce. It's like a plug-in store—Advanced Admins pick and install them to solve needs fast.

- **Package**:
  - **What It Is**: A bundle—like "Custom App + Objects"—to share or install customizations.
  - **Details**: Imagine it as your app suitcase—it's a zipped-up set of features (e.g., "Project Management App") you create or install. Managed packages lock code; unmanaged let you tweak—like a DIY kit vs. a locked box.

- **Sandbox Refresh**:
  - **What It Is**: A reset—like "Copy production now"—to update a test org.
  - **Details**: This is your sandbox reboot—it syncs your test environment (e.g., "Full Sandbox") with production data and setup for fresh testing. It's like hitting reset—Advanced Admins time it for deployment prep.

- **Deployment Status**:
  - **What It Is**: A check—like "Did it work?"—to track rollout success.
  - **Details**: Think of it as your flight tracker—it shows if changes (e.g., "Change Set") landed in production or crashed (e.g., "Error: Missing Field"). It's how Advanced Admins confirm the mission succeeded.

**Categories**

- **Deployment Tools**: The big areas you'll master.

    o Deploying Changes with Change Sets

    o Installing and Managing AppExchange Apps

    o Creating and Sharing Packages

    o Monitoring and Maintaining Deployments

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**Detailed Breakdown (Bullet Points with Massive Beginner Summaries)**

**1. Deployment Tools**

- **Deploying Changes with Change Sets**

    o **Summary**: Moving customizations—like "New Case Flow"—from sandbox to production with Change Sets.

    o **Details**:

      ▪ This is your deployment highway—like a courier for updates. Change Sets package components (e.g., fields, apps) and push them to production after testing. Advanced Admins wield it—like rolling out a new process for 1,000 users.

      ▪ **How You Set It Up**:

        ▪ **Sandbox**: Setup > Outbound Change Sets:

          ▪ **Details**:

            ▪ New: Name—like "Case Updates."

            ▪ Add: Components—like "Case Field: Priority," "Flow: Case Router."

            ▪ Upload: Send to production—needs connection (Setup > Deployment Connections).

          ▪ **Why It's Cool**: Simple—like "Pack and ship." Tracks—like "What's in here?"

- **Example**: "Sales Updates"—"Opportunity Field: Discount," upload—ready to go.
- **Production**: Setup > Inbound Change Sets:
  - **Details**:
    - Validate: Test—like "No errors?"
    - Deploy: Go live—changes apply.
  - **Why It's Cool**: Safe—like "Check before launch."
- **Why It's Great**: Controlled—like "No surprises!" Scales—like "1K users, smooth rollout."
- **What's Tricky**: Dependencies—missed items (e.g., "Flow needs Field") fail. One-way—sandbox to prod only. Test—prod's live!
- **Real-Life Example**: "Support Flow"—sandbox Change Set, "Case Flow," validate, deploy—live for agents.

- **Installing and Managing AppExchange Apps**
  - **Summary**: Adding third-party apps—like "Zoom Integration"—and keeping them updated or removed.
  - **Details**:
    - This is your app plug-in—like grabbing a tool off the shelf. AppExchange offers pre-built solutions (e.g., "DocuSign")—you install, configure, and manage them. Advanced Admins handle it—like integrating tools for 500 reps.
    - **How You Set It Up**:
      - **Install**: AppExchange (appexchange.salesforce.com):
        - **Details**:
          - Find: Like "DocuSign."
          - Install: "Get It Now"—pick org (sandbox/prod), agree terms.
          - Configure: Setup > Installed Packages—like "API Key."

- **Why It's Cool**: Fast—like "Sign docs in Salesforce!" Pre-built—like "No coding."

- **Example**: "Conga"—install in sandbox, test, prod—contracts flow.

- **Manage**: Setup > Installed Packages:

  - **Details**:

    - Update: New version—like "v2.1."

    - Remove: Uninstall—if unused (data loss warning).

  - **Why It's Cool**: Flexible—like "Swap apps easy."

- **Why It's Great**: Boosts—like "Features in hours!" Scales—like "1K users, no build."

- **What's Tricky**: Compatibility—check editions (e.g., Enterprise). Config—needs setup (e.g., keys). Test—bugs crash.

- **Real-Life Example**: "Zoom"—install, add "Zoom Link" to Events, update v1.2—meetings synced.

- **Creating and Sharing Packages**

  - **Summary**: Building packages—like "Project App"—to share customizations internally or externally.

  - **Details**:

    - This is your app factory—like packaging a gift. You bundle objects, fields, or apps into unmanaged (editable) or managed (locked) packages for reuse or sale. Advanced Admins craft it—like sharing a tool with 10 orgs.

    - **How You Set It Up**: Setup > Apps > Package Manager:

      - **Create**:

        - **Details**:

          - New: Name—like "Project Tools."

          - Type: Managed (locked) or Unmanaged (open).

- Add: Like "Project__c," "Flow: Task Assign."

- Save: Package ready.

  - **Why It's Cool**: Shareable—like "Give to another org."

  - **Example**: "Event Package"—"Event__c," unmanaged—team installs.

- **Share**:

  - **Details**:

    - Upload: Managed—get URL (e.g., "salesforce.com/pack/xyz").

    - Install: Other org—Setup > Packages > "Install from URL."

  - **Why It's Cool**: Reusable—like "One build, many uses."

- **Why It's Great**: Efficient—like "Build once!" Scales—like "10 orgs, same app."

- **What's Tricky**: Managed locks—plan all components. Dependencies—missed items fail. Test—install elsewhere.

- **Real-Life Example**: "Support Package"—"Case Tools," unmanaged, shared—sister org uses it.

- **Monitoring and Maintaining Deployments**

  - **Summary**: Tracking rollouts—like "Change Set landed?"—and keeping apps running smoothly.

  - **Details**:

    - This is your mission control—like a flight deck post-launch. You check Deployment Status, refresh sandboxes, and maintain apps (e.g., "Fix bugs"). Advanced Admins oversee it—like keeping 1,000 users happy post-deploy.

    - **How You Do It**:

      - **Monitor**: Setup > Environments > Deploy > Deployment Status:

        - **Details**:

- Check: Like "Case Updates"—"Success" or "Error: Field Missing."

- Logs: Debug—like "Why'd it fail?"

- **Why It's Cool**: Clear—like "It worked!" Fast—like "Spot issues."

- **Example**: "Flow Deploy"—"Success, 03/11/2025"—all good.

- **Maintain**:

  - **Sandbox Refresh**: Setup > Sandboxes—"Refresh" (e.g., Full, 29 days).

  - **App Updates**: Setup > Installed Packages—"Update v2."

  - **Cleanup**: Remove unused—like "Old Flow."

  - **Why It's Cool**: Fresh—like "Sandbox = Prod." Stable—like "Apps current."

- **Why It's Great**: Reliable—like "No crashes!" Scales—like "1K users, steady."

- **What's Tricky**: Errors vague—dig logs. Refresh limits—plan timing. Old apps clog—audit often.

- **Real-Life Example**: "Deploy Check"—"Sales App" success, refresh Partial sandbox, update "Conga"—org purring.

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**Tables**

**Table 1: Change Set vs. Package**

| What's Different | Change Set | Package |
|---|---|---|
| **Scope** | Sandbox to prod | Any org |
| **Type** | One-time move | Reusable bundle |
| **Example** | "New Field to Prod" | "App for All" |

**Table 2: Managed vs. Unmanaged Package**

| What's Different | Managed | Unmanaged |
| --- | --- | --- |
| Edit | Locked | Editable |
| Use | Sell/protect | Share freely |
| Example | "Paid App" | "Team Tool" |

**Table 3: Sandbox vs. Production Deploy**

| What's Different | Sandbox | Production |
| --- | --- | --- |
| Purpose | Test | Live |
| Risk | None | High |
| Example | "Try Flow" | "Flow for Users" |

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**Practical Scenarios**

1. **Deploy Flow**:
   - **Need**: New Case Flow to prod.
   - **Solution**: Change Set—"Case Router," upload from sandbox, deploy—live support.

2. **Install App**:
   - **Need**: Add DocuSign.
   - **Solution**: AppExchange—install "DocuSign" in sandbox, test, prod—signatures roll.

3. **Share Package**:
   - **Need**: Event tools for team.
   - **Solution**: Package—"Event__c," unmanaged, URL shared—team installs.

4. **Refresh Sandbox**:
   - **Need**: Test latest prod.

- o **Solution**: Full Sandbox—refresh, copy prod 03/11/2025—test-ready.

5. **Check Deploy**:

    - o **Need**: Confirm app works.

    - o **Solution**: Deployment Status—"Sales App Success"—users happy.

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**Study Tips**

- **Hands-On**: Free org (developer.salesforce.com)—deploy a Change Set, install an app, refresh sandbox.

- **Start Simple**: Trailhead's "Change Management" (overlaps) and "AppExchange Basics"—free, with videos and tasks.

- **Focus**: Master Change Sets (deploy), AppExchange (install), Packages (share), Monitoring (maintain).

- **Practice**: "Deploy a field?" or "Install an app?"—exam drills.

- **Beginner Boost**: Watch "Salesforce Deployment Basics" on YouTube; try one task daily—like Change Set, then Package.

- **Time**: Spend 10%—5 hours of 50—split: 1.5 on Change Sets, 1.5 on AppExchange, 1 on Packages, 1 on Monitoring.