ORGANIZATION SETUP

- Describe the information found in the company profile (e.g., fiscal year, business hours, currency management, default settings, company information).
- Distinguish between the various UI features that an administrator controls, including the implications (e.g., UI settings, search settings, list views, home page layouts).

- Company information= see various information related to my company profile. You'll see the company name, fiscal year starts, default time zone, Org ID
- Number of user licenses that are available
- Fiscal Year= is defined for your company to create account reports
- Can create a custom fiscal year but cannot disable it once enabled
- Business hours= specify the hours when your support team is available to serve customers. This helps make your department's processes, such as escalations and milestones more accurate.
- Currency Management= manage currency settings for Orgs with multiple currencies
- Will have to manually update conversion rates
- If conversion rates change, the amount in the fields will change
- Advanced currency management= allows you to set dated conversion rates in order to prevent rates from changing after they are closed
- Default settings= These are Salesforce settings for language, locale, time zone and currency. They can affect how objects such as accounts, leads, or opportunities are displayed. These settings are set when the org is first set up.
- Locale settings= First/Last name, date format, phone number format and currency format
- Create list views to see a specific set of contacts, documents, or other object records
- User permissions needed= create and customize list views and read on the record
- Settings= enable enhanced lists and enable inline editing
- You can customize the home tab to include components such as sidebar links, a company logo, a dashboard snapshot, or custom components that you create
- You can also assign different home page layouts to different users based on profile
- Settings= Home Page layouts in Setup
- Search Settings= enable "limit to items I own" search checkbox
- Number of search results displayed per object
- Set filters for search results so that users can refine their search results
- Enable document content search
- User Interface Settings:
  - Enable collapsible sidebar
  - Show quick create
  - Enable hover details
  - Enable related list hover links
  - Enable separate loading of related lists
  - Enable inline editing
  - Enable enhanced lists
  - Sidebar settings
  - Calendar settings

- ○ Setup settings
- Show quick create for create new drop-down menu
- Create new drop down can be disabled for users, not all companies like having it because it can lead to duplicates.
- The recycle bin contents remain for 15 days.
- Users will only have access to the apps that access is granted.
- Enable hover details and related list hover links.
- Enable separate loading of related lists so that if there are a lot of lists it will take less time waiting for things to load.
- Home Page Layout: Classic
- Sidebar = create new menu, recent items, custom links, messages and alerts
- Right pane = dashboard snapshot, items to approve, calendar, and tasks
- For lightning home and object page layouts you can chose what components are in the layout.
- Page layouts = fields, buttons, links, related lists
- Add or remove fields, make required or read only
- Can change section dividers
- Edit, add, or remove related lists
- List views are used to quickly segment list of records to allow you to use actions on multiple records at the same time so you can quickly change the owner or accept the leads from a queue.
- Can create custom views for users.

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https://help.salesforce.com/articleView?id=company_information_fields.htm&type=5
https://help.salesforce.com/articleView?id=customize_ui.htm&type=5
https://help.salesforce.com/articleView?id=customize_ui_settings.htm&type=5
https://help.salesforce.com/articleView?id=layouts_in_lex.htm&type=5
https://help.salesforce.com/articleView?id=accessibility_screen_reader.htm&type=5
https://help.salesforce.com/articleView?id=customize_layout.htm&type=5
https://help.salesforce.com/articleView?id=search_setup_parent.htm&type=5#search_setup_parent
https://help.salesforce.com/articleView?id=admin_language_locale_currency.htm&type=5
https://help.salesforce.com/articleView?id=admin_about_cfy.htm&type=5
https://help.salesforce.com/articleView?id=customize_homepage.htm&type=5

USER SETUP

- Identify the steps to set up and/or maintain a user (e.g., assign licenses, reset passwords, and resolve locked user accounts).
- Understand the implications of activating, deactivating, or freezing a user.

- If a user has issue logging in, first check the log in history of the user. If you see that the account hasn't been locked out or they've had unsuccessful attempts that means either incorrect username or wrong location.
- Setup→Manage Users→Click Edit
- Can assign or unassign licenses from here
- Setup→Manage Users→New Users
- Can assign role, profile, license

- Click generate new password
- Setup→Manage Users→Click checkbox by user→Reset Password
- Deactivate users when they leave
- Freeze accounts when they are an integral part of the system
    - Ex) if their account was used to run reports and dashboards
- Reassign after freezing the account then deactivate
- Active users count towards the number of licenses used in the org.
- Inactive users free up a license.
- To find out what people see, look at the permissions in the profile.

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https://help.salesforce.com/articleView?id=users_deactivate_considerations.htm&type=5
https://help.salesforce.com/articleView?id=users_unlock.htm&type=5
https://help.salesforce.com/articleView?id=adding_new_users.htm&type=5
https://help.salesforce.com/articleView?id=users_adding_multiple.htm&type=5

SECURITY AND ACCESS

- Explain the various organization security controls (e.g., passwords, IP restrictions, identity confirmation, network settings).
- Given a user request scenario, apply the appropriate security controls based on the features and capabilities of the Salesforce sharing model (e.g., organization-wide defaults, roles and the role hierarchy, manual sharing, sharing rules and public groups).
- Given a scenario, determine the appropriate use of a custom profile or permission set using the various profile settings and permissions.
- Describe how folders can be used to organize and secure communication templates, dashboards, and reports.

- The org = trusted IP ranges, login IP ranges, login hours
- Object = license, CRED permissions (via profile or permissions)
- Record = role hierarchy, sharing rules, teams & manual sharing
- Field = field level security, page layout
- Record access determines which individual records users can view and edit in each object they can access.
- Org wide defaults set the default level of access users have to records they do not own in each object.
- OWD = restrict access public/read write, public read-only, private
- Role Hierarchy = open up access (vertical)
- Sharing rules = open up access (lateral)
- Teams and manual sharing = open up access (flexible)
- A profile is a collection of permissions and settings that is instrumental in determining a user's functional access (apps, tabs, object-level permissions), how info is displayed to the user (page layouts, record types, field-level security), and a wide range of other permissions
- Each user must be assigned one profile
- Standard vs custom profile

- Permission sets are optionally assigned to a user to grant them privileges in addition to their profile.
- Can reduce the number of profiles needed in your org.
- The role hierarchy provides a frame work to structure access to records and folders in your org.
- Grant access using hierarchies is a setting for configuring OWD.
- For must standard objects, the option is always enabled.
- For custom objects, it is enabled but can be disabled.
- Users are granted CRED record-level permissions to the records meeting both criteria: the record is owned by a user in a subordinate role, the object has grant access using hierarchies enabled.
- Groups is comprised of users, roles, and other groups.
- Public groups are created and maintained by admins and can be referenced in OWD such as sharing rules.
- Personal groups are created and maintained by users and can only be referenced in select configuration such as outlook contact sync.
- Use public groups to streamline the process of sharing access to records and folders with a collection of users.
- Manual record sharing
- Delegated administration allows names users to manage other users within selected custom objects.
- Record ownership = have special privileges with their own records. Given the appropriate profiles permissions the user owning a record can always view and edit the record, transfer the record to a different owner, and delete.

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https://help.salesforce.com/articleView?id=admin_userprofiles.htm&type=5
https://help.salesforce.com/articleView?id=customize_fieldaccess.htm&type=5
https://help.salesforce.com/articleView?id=user_groups.htm&type=5
https://help.salesforce.com/articleView?id=managing_the_sharing_model.htm&type=5
https://help.salesforce.com/articleView?id=security_overview_passwords.htm&type=5
https://help.salesforce.com/articleView?id=security_overview_network.htm&type=5
https://help.salesforce.com/articleView?id=basics_identity.htm&type=5
https://help.salesforce.com/articleView?id=users_profiles_epui_login_ip_ranges.htm&type=5

STANDARD AND CUSTOM OBJECTS

- Describe the standard object architecture and relationship model.
- Explain how to create, delete, and customize fields and page layouts on standard and custom objects, and understand the implications of deleting fields.
- Given a scenario, determine how to create and assign page layouts, record types and business processes for custom and standard objects.

- Must map custom fields on the lead tab to custom fields on the account, contact, or opportunity record.
- Campaign　　Account　　Contacts
  ⎣ Lead　　⎣Contacts, Opportunities, Cases　　⎣Cases

- The related list on a parent record displays the related child records.
- A field on the child record links it to the parent record
- Record types = each object has a default master record type, but you can create new ones
- You must create at least one business process before you can create a record type for these objects: leads, cases, opportunities, and solutions.
- Create a record type prep: create a page layout, ensure picklist values are complete.
- Step 1: specify details, Step 2: select page layout for each profile, select pick list values
- To delete make sure it isn't used in validation or workflow rules
- Deactivate then delete
- Deleting a record type deletes the related path
- Deactivating a record type doesn't remove it from any user profiles or permission sets
- Create delete and customize fields in setup
- You can't delete a custom field that's referenced elsewhere. For example, you can't delete a custom field that's referenced by a field update or Apex.
- If the page layout is used within Salesforce, you will need to replace it with a different one before you can delete it.

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https://help.salesforce.com/articleView?id=customize_layout.htm&type=5
https://help.salesforce.com/articleView?id=customize_recordtype.htm&type=5
https://help.salesforce.com/articleView?id=creating_record_types.htm&type=5

SALES AND MARKETING APPLICATIONS

- Given a scenario, identify the capabilities and implications of the sales process.
- Given a scenario, identify the appropriate sales productivity features using opportunity tools and know when products and Price Books should be used
- Describe the capabilities of lead automation tools and campaign management.
- Describe the capability of Salesforce Content.

- A sales process is used to determine which opportunity stage are selectable when record types are enabled.
- A sales process is not required if record types are not enabled.
- Big deal alerts that automatically send an email notification for opportunities with large amounts.
- To ensure your team is keeping their opportunities up to date, create an automated email that contains a report of your team's open opportunities and send it to your direct reports
- Allow users to find closed/won opportunities that match the attributes of an opportunity they're currently working on, so they can quickly access information that might help them close their open deals.
- You can add the competitors related list to the opportunity.
- Customization is extremely limited, and the competitor information must be entered for each opportunity. Can use an app.
- Team selling allows users to work together on an opportunity and what each team member's role is.
- At least one price book must be configured and active in order to add products to either an opportunity or a quote.

- The use of multiple price books will allow orgs to price products independently for different groups of customers.
- Leads are converted when they have been identified as qualified sales prospects.
- Successful lead management helps sales and marketing manage the inbound lead process, track lead sources, and analyze return on their marketing investment.
- Mapping a custom lead field for conversion is a two-step process: create a field to store the data on the target object, map the lead field to the target object.
- Prioritize, distribute, and assign records to teams who share workloads.
- No limit to how many queues you can create.
- Anybody can take ownership of a record from the queue.
- Lead assignment rules will change the owner of a newly created or reassigned lead based on a set of rules defined by the system administration.
- Executed sequentially and only one active at a time.
- Web to lead generates a contact form that can be integrated within an existing website. Each form submissions creates a lead record in Salesforce.
- Lead auto-response rules are used to specify which email template is sent in reply to a web to lead submission.
- Manage outbound marketing campaigns with direct mail programs, seminars, print ads, email, and other kinds of marketing collateral.
- Organize campaigns into hierarchies for easy analysis to see what works best for increasing your company's sales.
- Campaign members are created from lead, contact, or person account records. These are added to campaigns.
- Hierarchies allow you to analyze and report on the health of your related campaigns with one another using a lookup relationship, you can group campaigns within a specific marketing program or initiative.
- Contain up to 5 levels and each campaign can have one parent campaign, but an unlimited number of sibling campaigns.
- Customizable campaign influence lets you and your marketing department decide how credit is assigned to each campaign that contributes to bringing in an opportunity.
- Content provides mechanisms to chare documents, version control, and granular access controls
- Workspaces is where you can upload documents to private or public workspaces aka libraries.
- A content delivery allows you to easily convert documents such as PowerPoint and word files into an optimized web-based version for easy online viewing.
- A content pack is a collection of related documents or files that are stored as a group in Salesforce CRM content.
- Tags are used to organize content.

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https://help.salesforce.com/articleView?id=campaigns_def.htm&type=5
https://help.salesforce.com/articleView?id=campaign_influence_parent.htm&type=5
https://help.salesforce.com/articleView?id=leads_def.htm&type=5
https://help.salesforce.com/articleView?id=sales_core_turn_opptys_into_deals.htm&type=5
https://help.salesforce.com/articleView?id=sales_core_manage_accounts_contacts.htm&type=5
https://help.salesforce.com/articleView?id=content_about.htm&type=5

SERVICE AND SUPPORT APPLICATIONS

- Describe the capabilities of case management (e.g., case processes, case settings, and case comments).
- Given a scenario, identify how to automate case management (e.g., case assignment, auto-response, escalation, web-to-case, email-to-case, case teams).
- Describe the capabilities of solution management and Salesforce Knowledge.
- Describe the capabilities of the Community application (e.g. Ideas, Answers).

— Case process is assignment rules, escalation rules, and validation rules also queues
— Case settings is choosing email templates, default case owner, case notifications and more.
— Case comments let you and your support agents add, edit, and delete public and private comments on a case.
— Case assignment rules are how cases are processed.
— Support processes detail the values for the status field on cases.
— The case status field identifies the high-level point in the case lifecycle
— Case escalations rules are used to reassign and optionally notify individuals when a case is not closed within a specified time period.
— Web to case and email to case for customers to send in a support need.
— Case auto-response rules send an email to the customer after submitting a case that the issue is being worked on.
— Case teams provide a clear way to document the roles of multiple users in a management of a single case. They also extend record access to team members (which can include community/portal users)
— A solution is a detailed description of a customer issue coupled with repeatable steps to resolve the issue.
— Solution categories allow you and your users to group similar solutions together, making them easier to find.
— Solution settings = enable solution browsing, multilingual solutions.
— Processes to control the steps your users follow for solution reviews.
— Portals allows customers to manage their cases, view solution/knowledge, contribute to communities (questions, answers, ideas) and access date with custom objects.
— Partner portal allows access to leads and opportunities.
— Self-service portal discontinued.
— Communities replaces the portals.
— Ideas provides a mechanism to capture feedback.
— Answers are Q&A.
— Salesforce knowledge is more robust solutions that are built from articles.

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https://help.salesforce.com/articleView?id=cases_intro.htm&type=5
https://help.salesforce.com/articleView?id=automation_rules_queues_parent.htm&type=5
https://help.salesforce.com/articleView?id=support_channels.htm&type=5
https://help.salesforce.com/articleView?id=knowledge_whatis.htm&type=5

ACTIVITY MANAGEMENT AND COLLABORATION

- Describe the capabilities of activity management (e.g., manage tasks, events, public calendars, multi-day events.
- Describe the features of Chatter (e.g., feed, groups, following, security).

— Tasks are used to represent to do items or actions such as phone calls, emails, physical mailings, and so on. Have a scheduled due date, with an optional reminder at a specified time.
— Quick ways to create and update tasks, prefiltered task lists, and task notification options.
— Events are used to represent scheduled meetings start and end than one day after they start.
— Create public calendars for managing group activities.
— Cloud scheduler is a way to set up meetings with customers.
— When feed tracking is enabled for an object, each time one or more tracked fields is updated, a chatter post is automatically generated.
— Users can view each other's Chatter feeds and profiles. However, when a user posts a record, other users must be able to view the record in order to see the post.
— Also for experience group archiving, records, unlisted, invitation.
— Three types of groups: public, private, unlisted
— Follow people, records, topics, file, dashboards, task and events, leads
— Feed = posts

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https://help.salesforce.com/articleView?id=collab_chatter_get_started.htm&type=5
https://help.salesforce.com/articleView?id=collab_feeds_parent.htm&type=5
https://help.salesforce.com/articleView?id=activities.htm&type=5
https://help.salesforce.com/articleView?id=tasks.htm&type=5
https://help.salesforce.com/articleView?id=events_and_calendars.htm&type=5

DATA MANAGEMENT

- Describe the considerations when importing, updating, transferring, and mass deleting data (e.g., CSV files, data quality, field mapping, record IDs, external IDs, duplicate records).
- Given a scenario, identify tools and use cases for managing data (e.g., dataloader, data import wizard).
- Describe the capabilities and implications of data validation tools.
- Describe the different ways to back up data (e.g., data export service, exports, dataloader).

— Data Import Wizard = import fewer than 50,000 records, prevent duplicates when importing new records, choose whether or not to trigger workflow rules.
— Can import accounts, contacts, leads, solutions, custom objects.
— Apex Data Loader = load up to 5,000,000 records, load objects such as products or opportunities, schedule imports, save mappings for later use, export or delete data.
— Backing up data is a regular part of any admins job, data should be backed up on a regular basis and before any major import or export operations. There are several ways to back up data in Salesforce.
— Reports = export specific data to CSV, excel, or another database, process can be manual or automated.
— Record ID's = every record in Salesforce is assigned a 15-digit record ID.
— Must be a CSV file to upload.

- External ID is a custom field that has the external ID attribute, meaning that it contains unique record identifiers from a system outside of Salesforce
- ID's are used to prevent the import from creating duplicate records
- Use validation or duplicate rules to prevent duplicates.
- Field mapping to match the fields in the CSV file to fields in Salesforce.
- Data.com verifys the accuracy of your data
- Uses Dun and Bradstreet

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https://help.salesforce.com/articleView?id=importing.htm&type=5
https://help.salesforce.com/articleView?id=data_import_wizard.htm&type=5
https://help.salesforce.com/articleView?id=data_loader.htm&type=5

ANALYTICS - REPORTS AND DASHBOARDS

- Describe the options available when creating or customizing a report (e.g., report type, report format, fields, summarizing data, filtering data, charting, scheduling, and conditional highlighting).
- Describe the impact of the sharing model on reports.
- Describe the options available when creating and modifying dashboards (e.g., dashboard components, data sources, chart types, scheduling, and running user).
- Describe the capabilities of custom report types.

- Report type = what object and related objects do you want to report on?
- Scope = what records do you want to see and for what time frame?
- Columns = what columns do you want to see?
- Format = do you want records displayed in a list (tabular), grouped (summary), in a grid (matrix), or in blocks (joined)?
- Grouping = which fields do you want to group by?
- Summaries = which numerical fields do you want to display group subtotals and grand totals?
- Filters = what additional filters do you want to limit records you see?
- Highlights/Charts = do you want to display summarized data with highlights are as charts?
- Report Types are predetermined combinations of related objects and fields used as starting points for new custom reports.
- Custom reports use a standard report type for related objects.
- Highlight exceptional values in key fields to make them stand out.
- Tabular reports = the simplest way to look at data, tabular reports are an ordered set of fields in columns, with each row representing a record.
- Summary reports = are similar to tabular reports, but they also allow you to group rows of data, view subtotals, and create charts.
- Matrix reports = allow you to group data by both rows and columns. They are good for comparing values in several fields.
- Joined reports = let you create multiple report blocks, with each block acting as its own "sub-report" with its own report type, fields, columns, sorting, and filtering.
- Add up to 20 additional filters to a report, directly in the filters pane, using the add button, or by dragging in fields from the preview pane.

- In addition, use filter logic to: link multiple filters using “and”, “or”, and “not” operators to create sophisticated conditions, offset priority conditions using parentheses and nested parentheses.
- Charts to view the data visually.
    - single groups = horizontal bar, vertical bar, line graph, funnel, pie, donut
    - multiple groups = side by side bar, stacked bar, stacked by 100% bar, grouped line
- to schedule and email reports need to specify a running user, frequently, start and end dates
- A dashboard is a visual representation of data from multiple reports and comprises up to 20 components.
- Displays data from custom source reports.
- Can use Visualforce pates to present data from other sources.
- Has a running user to determine what data is visible.
- Displays the data as of the last time the dashboard was refreshed.
- Can be scheduled to be refreshed and emailed automatically.
- Components use the first summarized field in the source report. You can edit chart components to change the grouping and field used.
- The running user determines what data users see.
- It can be:
    - Fixed (selected when creating dashboard)
    - Dynamically set to user viewing dashboard
    - Selected by authorized users viewing the dashboard
- Components can be charts, tables, gauges, metrics, or other components that you can create with visualforce.
- Custom report types let you pick which objects and fields you use.
- Access to reports and dashboards is controlled through folders on the reports tab.
- Traditionally all users with access to the folder have the same level of access.
- Access can be ready only or read/write
- Folders can be accessible to all users, hidden from all users, or shared using public groups or roles.
- Access to folders does not roll up in the role hierarchy.
- Enhanced folder sharing gives users finer control over how they share their reports and dashboards.
- Different groups of users can be given different access to the same folder
- Viewer can only view, editor can edit, manager can control who has access.
- Enabling enhanced folders sharing may change the existing access to reports and dashboards, depending on their user permissions.

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https://help.salesforce.com/articleView?id=rd_dashboards_overview.htm&type=5

WORKFLOW/PROCESS AUTOMATION

- Given a scenario, identify the appropriate automation solution based on the capabilities of workflow/process.
- Describe capabilities and use cases for the approval process.

- A workflow rule sets workflow actions into motion when certain conditions are met.

- Actions can take place immediately, or on a specific date, according to a trigger.
- Workflow actions can fire immediately once the record is saved, or they can be time delayed.
- Workflow rules are used to automatically take action when a record meets a specific criteria.
- Workflow can be tasks, email alerts, field updates, or outbound messages.
- Rule criteria = add filters when certain conditions are met.
- Rules created after saving records do not trigger for these records retroactively.
- Evaluation criteria = created, created and edited, created and edited meeting criteria.
- Lightning process builder lets you automate business processes using a visual interface.
- Processes allow you to execute actions when certain conditions are met.
- You can create add multiple groups of criteria and associate actions with each criterion.
- You can create immediate and scheduled actions.
- You can use versioning to easily track and maintain processes.
- It does more than workflow like create a record, post to chatter, use a quick action, submit for approval, launch a flow call apex.
- Assignment rules = assign leads/cases to owners based on criteria you specify with in the rule.
- An approval process is manually initiated by the user.
- The admin configures the approval process which determines the conditions that must be met in order to submit a record for approval, who must approve the record, and what actions take place as a result of approval or rejection.
- Is an automated process implemented to approve records in Salesforce.
- The process visualized allows you to examine and annotate an existing approval process.
- Validation rules → auto-response rules → workflow rules → processes → escalation rules
- Sample approval processes = PTO requests, expense reports, discounting opportunities, job candidates
- Sample process builder = opportunity management

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https://help.salesforce.com/articleView?id=customize_wf.htm&type=5
https://help.salesforce.com/articleView?id=what_are_approvals.htm&type=5

DESKTOP AND MOBILE ADMINISTRATION

- Describe the capabilities of the Salesforce Mobile App.
- Describe the installation and synchronization options of Salesforce Lightning for Outlook.

- Salesforce1 provides a way to access Salesforce from mobile devices. It can either be accessed via mobile web browser or from an installed application on the mobile device.
- SalesforceA is a mobile application that allows for some Saleforce administrative functions to be performed from a mobil device.
- Salesforce1 = you can view, edit, and create records, manage your activities, view your dashboards and reports, and use chatter.
- SalesforceA = deactivate or freeze users, reset passwords, unlock users, edit user details, and assign permission sets.
- Salesforce for Outlook allows you to sync your outlook contacts, calendars, tasks to and/or from Salesforce, add emails sent from Outlook into Salesforce, and more.

- Download the latest version
- Requires supporting software
- Select language
- Can choose to sync certain items
- Sync direction one or both
- Salesforce always wins or outlook always wins

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  https://help.salesforce.com/articleView?id=outlookcrm_sfo_about.htm&type=5

APPEXCHANGE

- Identify use cases for AppExchange applications.
  - the app exchange is a marketplace to buy, guild, sell and install apps for Salesforce.com
  - Common use cases include:
    - marketing automation (Marketo)
    - data quality (duplicate prevention)
    - connectors (to variety of external systems)
    - expense management(Concur)

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