Salesforce Certified Administrator – Master Cheat Sheet

Admin Cheat Guide

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Getting your org ready for Users

- CRM Implementation goals to track ROI
  - Maximize revenue
  - Productivity improvement and gains
  - User Adoption
- Chatter Profile
  - Photo
  - Description in About me
- Chatter Emails
  - Username > My Settings
  - Email Notifications can be turned on / off various activities such as likes, mentions etc.
- Objects
  - Standard – Campaign, Lead, Opportunity, Account, Contact, Case, Solution, User
  - Custom objects
  - Account
    - Opportunity
    - Contact

            - Case
        - Parent Account association – self lookup
        - 1 Contact to Multiple Accounts
            - **Associate Contact to Multiple Accounts** Setting in Setup
            - Related Contacts related list
- Tabs & Apps
    - Apps = Group of tabs
    - App Menu
- Home Page
    - Chatter updates for records you follow
    - Dashboard with max 3 components
    - My Tasks
    - Calendar – Upcoming events
- Lightning Experience
    - Currently available for Sales Cloud
    - Key Features
        - Performance Charts
        - Key Account Insights
        - Social Accounts, Contacts
        - Sales Path
        - Improved Search
            - Recent records
            - Pin specific search results
        - Details
    - Applicable for
        - Sales orgs with a B2B business model
        - Contacts, Lead, Opportunities, Account
        - Custom Objects
        - Can be rolled out to a specific set of users or pilot implementations
        - Reboot / revamp existing salesforce implementations
- Enabling Lightning Experience
        - Setup > Lightning Experience
        - Steps
            - Enable Recommended Features
                - Account Insights
                - Social Accounts, Contacts
                - Notes
            - Setup Users
                - Users who prefer to remain in the classic mode can do so using **Switch to Salesforce Classic** Link

        - Enable Lightning Experience
- Help and Training
    - Knowledgebase
    - Videos
    - Articles
    - Training and Certification details
    - Contact Support Option
        - Raise a support Case

Setting and Managing Users

- Global Settings
    - Apply to the entire org and comprise of
        - Company Profile
        - UI Settings
        - Calendar
        - Search Settings
        - Chatter
- Profiles
    - Settings & Permissions that control what User can see in the UI and do.
    - Settings control
        - Apps
        - Tabs
        - Page Layouts
        - Record Types
        - Fields
        - Salesforce Classic or Lightning Experience
    - Permissions control
        - Administrative Permissions
            - Customize app
        - General User Permissions
            - Run report
            - Mass email
        - Standard & Custom Objects
            - CRUD permissions
- Tab Settings
    - Tab Hidden – Always hidden cannot be displayed
    - Default On – Always displays

- Default Off – Hidden but can be turned on by User

- Profile Types
  - Cannot be edited or deleted
  - Best practice to Clone before using them
  - Standard Profiles
    - System Administrator – View + Modify All + Customize App
    - Standard User – View and Modify all accessible records
    - Solution Manager – Standard user + Manage published solutions
    - Marketing Manager - Standard user + Import Leads
    - Contract Manager - Standard user + Manage Contracts
    - Read Only – View All accessible records
  - Chatter Profiles
    - Driven by 2 main types of licenses
    - Chatter Free User License and offers 2 main types of Profiles
      - Chatter Free User
        - Access all Chatter users
        - Access all Chatter groups
        - Like and Post Comments
      - Chatter Moderator User
        - Admin Privileges
        - Activate / deactivate other Chatter Free Users or Moderators
        - Grant / revoke moderator privileges
        - Delete posts / comments
    - Chatter External User License
      - Access to groups which they are invited to only
      - Interact with people for that group only
      - Usually assigned to Customers
  - Custom Profiles
    - Available in Dev, Enterprise and Unlimited Editions
    - Limited to 1500 profiles per license type
    - Can be created by System Admins only

- Permission Delegation
  - Delegating specific permissions is possible without providing Manage Users permissions to all Users. Other permissions that can be selectively granted
    - Manage Internal Users
    - View All Users
    - Manage IP Addresses

- Manage Login Access Policies
- Reset User PW and Unlock Users
- Manage Roles
- Assign Permission Sets
- Manage Profiles and Permission sets
- Manage Sharing

- User Interface Settings
  - Enhanced Profile User Interface needs to be explicitly enabled.

- Profile Permission Categories – App & System
  - App Permissions
    1. Assigned Apps
    2. App Permissions
    3. Custom Permissions
    4. Connected Apps
    5. External Data Source Access
    6. Named Credential Access
    7. Object Access
    8. Apex Class Access
    9. Visualforce Page Access
  - System Permissions
    - System Permissions – Modify All
    - Desktop Access
    - Login Hours
    - Login IP Range
    - Password Policy
    - Session Timeout

- Users
  - Consists of 3 main types of info
    - Personal
      - Name
      - Email
      - Phone
      - Title
    - Security & Access
      - Username
      - License
      - Profile

        - Role
        - Login History
    - Locale
        - Timezone
        - Locale
        - Language
        - Currency

- Chatter Users
  - Can follow Records or People
  - 2 main license types
    - Chatter Free
      - No access to any SFDC data standard or custom objects
    - Chatter External
  - Chatter Users can be created
    - Manage Users > Add User screen
    - Chatter Settings
      - Co-worker invitations = Chatter Free License
      - Customer invitations = Chatter External License
  - Chatter Invite validity up to 30 days.
  - Chatter Free User Experience
    - Chatter
    - Profile
    - People
    - Groups
    - Files
  - Chatter Customer Experience
    - View Access to Groups and Profiles of the belonging Groups
    - Files shared in the groups they belong to.
    - No access to SFDC data
    - Cannot be followed or follow other people

- Troubleshooting Login Issues
  - User unable to login
    - Verify login history
    - Check for invalid password entry
    - Reset password using Forgot Password option
    - Unlock User if password lockout occurs
  - If no entry displays in Login History, then Invalid Password is being entered
  - Geographic Location supported in Salesforce Classic & Lightning Experience
  - Dealing with Invalid Passwords

        - Best practice for Users to Reset their own passwords
        - 5 Password Resets are allowed in a 24-hour period
        - Password can be reset
            - By users from the Forgot Password option on login page
            - Manage Users > Reset Password
    - Password Lockouts
        - Password Policy
            - Login attempts (3, 5, 10)
            - Lockout Period configurable by Admin (15, 30, 60 mins, Forever)
        - Unlock button on Manage Users to unlock locked out Users

- SalesforceA
    - Mobile App designed for administrators to carry out routine Admin tasks
    - SalesforceA helps with
        - Password Reset
        - Unlocking Users
        - Freeze Users
        - Deactivating Users
        - View and edit User information
        - Assign Permission Sets
        - System status
        - Account switching between multiple organizations
    - Supported OS
        - iOS 8 or later
        - Android 4.4 or later

Security and Data Access

- Security Enforcement Hierarchy
    - Org Level – Login Hrs., Login IP Restrictions
    - Object Level
    - Record Level
    - Field Level

- Org Level Security
    - Unrecognized Computer Logins Flow
        - First User Login
            - Salesforce creates a browser cookie
            - Login
        - Subsequent Login
            - SFDC verifies the cookie
            - Recognized computer

        - Yes = Login
        - No = Verification Code and Login
    - SMS Identity verification through SMS cannot be deactivated after activation
    - Identity verification
        - User tries to login from an untrusted IP Range
    - Trusted IP Range
        - Set Login IP Range
    - Login Hours
        - Permits login during specific hours
        - Controlled via Profiles
    - Health Check Tool
        - Proprietary tool to verify org's security profile against salesforce's baseline security guidelines
        - Health Check Status
            - High Risk
            - Low Risk
            - Meets Risk Standards
        - Permissions required
            - View Setup and Configuration
            - Modify All

- Object Level Security
    - Object level security permissions
        - CRUD
        - View & Modify All
    - CRUD Permissions
        - Mass CRUD permission update for Objects
            - User Interface > Enhanced Profile List Views
            - 200 records at a time
    - Permission Sets
        - Provides elevated permissions to an existing Profile
        - Controls access to Lightning experience
        - Max of 1000 permission sets / org
        - Controls
            - App
            - Tab
            - Field
            - Apex Class
            - Visualforce Page
        - User can be assigned to multiple permission sets

- Troubleshooting as End User
  - My Settings > Grant Login Access
  - Modify All & View Setup and Configuration can Login as any User

- Record Level Security
  - Controlled by Roles
    - Permission to View and Edit specific records
  - Data Access Models
    - Public
      - View All Records
      - Default model in Salesforce
    - Private
      - Access record owned by them only
      - Not accessible in Reports and Search
    - Hybrid
      - Public + Private
    - Record Ownership
      - Read, edit, delete & transfer own records
      - Case, Contact & Opportunity
        - View Account Records provided they at least have Read Only access
  - Org Wide Defaults
    - Baseline level of access to records they DO NOT own.
    - Most restrictive mechanism for access
    - Private
    - Public Read Only
    - Public Read Write
    - Public Read Write Transfer
      - Available for Lead and Case records only
  - Role Hierarchy
    - Opens up access to records Owned & Shared with Users below them
    - Users at same level DO NOT have access to each other's data
  - Techniques to Open Record Access
    - Sharing Rules comprise of
      - Which Records to share
        - By Record Ownership
        - By Field Values = Criteria
          - Text & Text Area Are Case Sensitive

            - Supported on Accounts, Contacts, Opportunity, Cases, Custom Objects
        - Share with
            - Public Groups
            - Roles
            - Roles & Subordinates
        - Access
            - Read Only
            - Read Write
        - Contact Sharing rules cannot be used on orgs having Territory Management or Person Accounts enabled
        -
    - Public Groups
        - Minimize creation of multiple sharing rules
        - Contains the following
            - Individual Users
            - Roles
            - Roles & Subordinates
            - Public Groups
        - Used to restrict access to Folders & List Views
    - Manager Groups
        - Share records up or down the management chain
        - Manager Groups checkbox should be enabled in OWD
        - Supports the following mechanisms to share records
            - Manual Sharing
            - Apex Sharing
            - Sharing Rules
        - Cannot be included in the other
    - Account and Opportunity Teams
        - Account Teams
            - Collaborative account management
            - Sharing & Reporting Purpose
        - Opportunity Teams
            - Collaborative Sales
            - Sharing & Reporting Purpose
            - Only informational and does not share revenue
            - Default teams can be selected by Opp Owners
        - Account and Opp Teams use the same Role list
    - Manual Sharing
        - Share button on record

- Can be shared by Record Owner, User above in the Role Hierarchy and Sys Admin

- Field Level Security
  - Enforces Data security
  - Ability to view and edit fields
  - Users view relevant data only
  - Restricts viewing data from
    - List Views
    - Search Results
    - Reports
  - Permissions
    - Visible
    - Visible + Read-only
    - None i.e. not accessible

Customization using Fields

- Standard Fields
  - Predefined and ready to Use
  - Cannot be deleted but hidden from page layouts
  - Permissible Actions
    - Label change
    - Help text change
    - Add or edit Lookup Filters
    - Add or edit Picklist Values
    - Set history tracking
    - Format Auto Number fields. Existing records if present remain unaffected and only new records are affected.
- Custom Fields
  - Available on Standard and Custom objects
  - Max of 25 long text area custom fields per object can be specified
  - Reasons for Data Loss
    - Change in Data Type
      - Deletes List Views or Assignment Rules based on fields
    - Field deletion
      - Can be restored along with data before being deleted permanently
      - Stored for a max 15 days before being deleted permanently

        - Soft Deleted fields count against the field limits

- Picklists
  - Picklists support
    - Speed of data entry
    - Data integrity for reporting, searching
  - If picklist options are removed existing records will need to updated explicitly
  - Dependent picklists
    - Controlling and dependent picklists
    - Accurate and consistent related information
    - Can be multilevel
      - Controlling
        - Standard picklist
        - Custom picklist
        - Standard checkbox
        - Custom checkbox
      - Dependent
        - Custom picklist
        - Custom multi select picklist

- Lookup Fields
  - Supports linking of
    - 2 diff objects
    - Object to itself
  - Special type of Parent – Child relationship where Parent is optional
  - Enhanced lookup interface provides
    - Searching
    - Sorting
    - Filtering
    - Pagination

- Lookup Filters
  - Can reference
    - Fields on the same record
    - Fields on Target object
    - Fields on records directly related to Target object
    - Fields on User, Profile, Role
  - Required or Optional
  - Dependent Lookups

- Formula Fields
    - Calculations for business rules
    - Support – Text, Number, Date, Checkbox
    - Can reference standard or custom formula fields
    - Do not support
        - Encrypted description
        - Custom long text area fields
    - Unavailable for
        - Lead Conversion
        - Weekly Export Service
    - Can traverse 10 level upwards for Parent fields
- Page Layouts

- Record Types
    - Web to Case
        - Default Record Type of Default Case Owner is used
    - Web to Lead
        - Default Record Type of Default Lead Owner is used
    - Business Process
    - Field History
        - 20 fields per object
        - Purpose
            - Auditing
            - Data Quality
            - Reporting

- Data Validation
    - 2 main types System & Custom
    - System Validations
        - Required fields
        - Unique fields
            - Email
            - Number
            - Text fields which are Case Sensitive
    - Custom Validation
        - Only execute if System Validation pass
        - Comprise of 2 parts
            - Criteria or Formula
            - Error Message

Data Management

- ## Data Import Wizard
  - Unified wizard that supports importing the following objects
    - Accounts
    - Contacts
    - Leads
    - Solutions
    - Campaign Member Status
    - All Custom Objects
  - Support Operations
    - Add new records
    - Update existing records
    - Add and update existing records
  - Supports import from the following sources, in CSV format only
    - CSV file
    - MS Outlook CSV
    - Gmail CSV
    - ACT CSV

- ## Preparing your import file
  - General considerations
    - Check for spellings
    - Check for empty or blank spaces
    - Ensure column headers are the same as field names for easy match
  - Additional considerations
    - Remove duplicate records
    - System & Custom Validation requirements
    - Required Fields
      - Need to be mapped else causes the import to fail generating an error
    - Owner fields
    - Currency fields
      - Unmapped currency field generates error
    - Picklist Values
      - All picklist values being imported should exist in Salesforce

- Data Loader
    - Client app that permits login using
        - Username
        - Password = Pwd + Security Token (Unverified machines)
    - Supports all Standard and Custom Objects
    - Support Operations
        - Insert
        - Update
        - Delete
        - Upsert
        - Export & Export All

- Import Wizard Vs Data Loader

Feature	Import Wizard	Data Loader
Record Volume	50,000	50,00,000
Supported Objects	Specific objects	All Objects
Schedule Exports	No	Yes
Dupe check during import	Yes	No
Fire Workflow Rules	Checks	Automatically always fires
Delete & Export Operations	No	Yes
Save Fields Mappings	No	Yes

- Data Import Best Practices
    - Picklist Values exist in the Salesforce Org
    - Clean and Dedupe data
    - Only required Record Ids should be exported
    - Deactivate Workflows & Validation Rules during import
    - Perform data imports during off hours in order to ensure minimum or no impact on business
    - Import a test batch before importing the complete set of records

- Data.com
    - Database that provides verified information for
        - Contacts
        - Organizations (Source D&B)
    - Provides an easy and efficient way to search and clean data
    - Requires a separate License
        - Premium Prospector

                - Add new Leads, Accounts, Contacts
                - Compare existing data with Data.com's data
                - Supported on Salesforce1
            - Corporate Prospector
                - Premium Prospector + Data.com Clean
        - Data.com Clean
            - Requires a separate license for every Salesforce User
            - Automated jobs to clean existing data
        - Data.com Accounts
            - Users without Data.com license
                - Search records but key information details are hidden
            - Users with Data.com License
                - Search
                    - Filter
                - Export & Add records to Salesforce
        - Data.com Contacts
            - Add Get Contacts button to Contacts page layout
            - Choose department
        - Prospecting Insights
            - Add Prospecting Insights button to Contacts page layouts
            - Provides key industry and financial details required by Sales reps

- Data.com Duplicate Management
    - Uses Data.com technology but does not require a Data.com License
    - Duplicate Rules
        - Approve / Reject creation of duplicates
        - If Duplicate creation is allowed
            - Alert User
            - Report on Duplicate data
    - Setting up Duplicate Management
        - Setup > Data.com Administration
        - Steps
            - Duplicate Rules Creation & Activation
            - Matching Rules Creation & Activation
            - Custom Report Types to report in duplicate data

- Social Accounts, Contacts and Leads
    - Requires explicit enablement from Setup > Customize > Social Media
    - Supported Social Platforms

  - Facebook
  - LinkedIn
  - Twitter
  - Klout

- Mass Transfer Records
  - Out of box tool to bulk transfer records from one SF User to another
  - Supported objects
    - Accounts
    - Opportunities
    - Leads
    - Cases
    - Service Contracts
    - Custom Objects
  - Permits criteria based searching

- Periodic Data Backup
  - Backup options
    - **Reports**
      - Schedule a report for future so that it is automatically exported to a CSV format
    - **Data Loader**
      - Command line interface that allows scheduling of data exports
      - Offers flexibility to
        - Choose which objects to backup
        - When to run the export service
    - **Data Export Service**
      - Out of box offering that permits scheduling a data export
        - Weekly
        - Monthly
      - Export format
        - Zip file containing CSV files for all objects chosen to be backed up
      - Supported Objects
        - All standard & custom objects
        - Permits exporting Attachments, images and files
        - Salesforce Content & Versions
        - Chatter Files
      - Automated notification email when zip files are ready

            - Zip files are available for only 48 hrs. after which they are deleted automatically

- Mass Delete
    - Out of box feature that permits deletion of multiple records
        - Permits criteria based search
        - Permanent or Soft Deletion
            - Soft delete keeps the deleted records in Recycle Bin for 15 days from date of deletion and then are permanently deleted
        - Recycle Bin
            - My Recycle Bin
                - Only their respective deleted records
            - All Recycle Bin
                - Access to Sys Admins or users with Modify All Permissions
                - All records deleted in the Salesforce org

Reports & Dashboards

- Reports
    - List of data which can be aggregated or summarized for data analysis
    - **Report formats**
        - Tabular
        - Summary
        - Matrix
        - Joined
    - **Report Types**
        - Standard Reports
            - Out of box
            - Stored in Standard folders
            - Cannot be overridden hence need to be saved as a Custom report to modify the same
        - Custom Reports
            - User defined
            - Stored in custom, personal or unfiled folder
    - **Enhanced Report Tab capabilities**
        - Search for folders
        - View contents of a selected folder
        - Search for specific reports within a folder

        - Follow to receive notifications for any modifications made to a report
        - Customize reports e.g. sort, add / remove columns
        - View Recently Viewed reports & dashboards

- Report & Dashboard Sharing Model
    - Access to Reports & Dashboards is controlled using folders
    - 2 main Report Sharing Models
        - Traditional Sharing
        - Enhanced Sharing Model
    - **Traditional Sharing Model**
        - All users with access to a folder have same level of permissions
        - Public folder access types
            - Read / Write – Save new reports
            - Read Only
        - Folders can be shared with the following
            - Users
            - Roles
            - Roles & Subordinates
            - Public Groups
    - **Enhanced Sharing Model**
        - Provides finer level of access to what users can do within folders
        - 2 main types of access permissions
            - Viewer
                - View data in R&D
            - Editor
                - Viewer + Modify R&D
                - Move R&D to other folders
            - Manager
                - Editor + Manage Users who can access folders

- Custom Reports
    - **Report Builder**
        - Drag and drop utility to build reports
        - 3 main sections
            - Preview Pane
            - Filters
            - Fields
    - Tabular reports

- Provide a list of data e.g. mailing lists
- Does not support summaries or sub totals

- Summary reports
  - Provides grouping
  - Summary at grouping
  - Sort
    - Grouped field
    - Summary field
    - Report formula
- Reports headers can be Floating
  - Setup > Report & Dashboards Settings
- Matrix Reports
  - Provides a pivot to view data in multiple dimensions
  - Reports can be grouped by Dates

Report Filters

- Ability to filter and show only relevant data
  - Add fields to filter
  - Supported operators
    - And, Or, Not
- Max of 20 filters can be added
- Relative Date values can be added to filters for finer level of filtering the data being displayed on the report
  - Today
  - Yesterday
  - Last n Days
  - Next n Days
  - Last n Quarter
  - Next n Quarters

Custom Summary Formula

- Custom algorithm that derives its values based on values from other fields
- Available for – Summary, Matrix and Joined
- Max chars - 3900
- At max 5 can be added
  - Can reference Formula fields on data
  - Cannot reference other Summary Formula fields
- Supported Return Types
  - Number
  - Currency
  - Percentage

- Displayed on Summary Rows only
- Supported summary types
  - Sum
  - Largest Value
  - Smallest Value
  - Average

- Adding Visual Highlights to Reports
  - Color highlighting based on Summary and Custom Summary Formula Fields

- Adding Charts
  - Graphs that represent report summary data visually
  - Can be added to Page Layouts
  - Chart Types
    - Line Chart
      - Preferred for trends over a time period i.e. group by dates
    - Bar Chart
      - Horizontal – High number of groups
      - Vertical – Low number of groups
    - Pie / Donut Chart
      - Donut charts display Grand Total
    - Funnel Charts
      - Compare summarized values of grouping
    - Scatter Chart
      - Compare numerical values within a group
      - Supported in Report Builder upgrade
  - Multiple Groupings on Charts
    - Side by Side Bar
    - Stacked Bar
    - Stacked to 100% Bar
    - Grouped Line

- Sharing Reports with Users
  - Supported mechanisms – Print, Email, Export
  - Print
    - Printable View button
      - Excel format
    - Browser's Print functionality
  - Export
    - Comma delimited .csv
    - Excel .xls

            - Report footers containing metadata are included
                - Can be turned off Setup > Report & Dashboard Settings
    - Schedule
        - Configure the following for scheduling a report
            - Use Schedule Future Runs
            - Running User
                - Requires access to folders where reports are stored
            - Frequency
            - Start & End Date
            - Recipients
        - Scheduled Report Email
            - Data in Html format with links to Salesforce
            - Link to actual report in Salesforce

- Dashboards
    - Visual representation of key business data
    - Max of 20 components per dashboard
    - Schedule, refreshed and emailed automatically
    - Running User
    - Visible to all Users who have access to the folder if Enhanced Sharing is enabled
    - Supported Components
        - Summarized data viewing for groups
            - Tables
            - Charts
        - Single data value
            - Gauge
                - Showcases progress towards a goal
                - Notification when a breakpoint is reached
            - Metric
                - Conditional highlighting
    - Dashboard Component Snapshots
        - Posts snapshot to a Chatter feed
        - Enable Feed Tracking
        - Enable Dashboard Component Snapshots
        - Visible to everyone in the feed
    - Dashboard Running User
        - Summary viewed based on the Running User
        - Detail data displayed in report is based on individual access
    - Dynamic Dashboards
        - Data in dashboards visible based on Security Settings of user viewing it

        - Specify users who can Change Running User
    - Dashboard Filters
        - At max of 3 filters each
        - Supported types
            - Currency
            - Picklist
            - Date & DateTime
            - Text
            - Lookup
        - At max of 10 options per filter
        - Actions
            - View diff subsets of data
            - Post Snapshots to Chatter
            - Scheduled or emailed DB show unfiltered data
            - VF Pages not supported
    - Drilldown
        - Source report (Default)
        - Filtered Source Report
        - Record Detail Page
        - Url
- Additional Features
    - Bucket Fields
    - Cross Filters
    - Joined Reports