

# **Salesforce Admin Topics (Complete List)**

---

## **1. Salesforce Basics**

- Salesforce Architecture (Multi-tenant, Metadata-driven, Cloud model)
  - Editions, Licenses, and Features
  - Company Profile (Fiscal Year, Business Hours, Holidays, Currencies)
- 

## **2. User Setup & Security**

- Creating & Managing Users
  - Profiles & Permission Sets
  - Permission Set Groups
  - Roles & Role Hierarchy
  - Organization-Wide Defaults (OWD)
  - Sharing Rules (Criteria-based, Owner-based)
  - Manual Sharing & Team Sharing (Account, Opportunity, Case Teams)
  - Login IP Ranges, Login Hours
  - Two-Factor Authentication (2FA)
  - Session Security Settings
  - Security Health Check
- 

## **3. Data Modeling**

- Objects (Standard vs Custom)
  - Fields (Standard, Custom, Formula, Roll-Up Summary, Geolocation)
  - Field Types (Lookup, Master-Detail, External Lookup, Indirect Lookup, Hierarchical)
  - Relationships (Lookup, Master-Detail, Many-to-Many with Junction Objects, Self-Relationship)
  - Field Dependencies (Controlling & Dependent Picklists)
  - Schema Builder
- 

## **4. Data Management**

- Data Import Wizard
- Data Loader (Insert, Update, Upsert, Delete, Export)
- External IDs
- Deduplication (Duplicate Rules, Matching Rules)
- Data Skew Issues

- Large Data Volume Best Practices
  - Mass Transfer Records, Mass Delete Records
  - Data Archiving & Storage Management
- 

## 5. Automation Tools

- Workflow Rules (legacy, deprecated)
  - Process Builder (legacy, deprecated)
  - **Flow Builder (current & most important):**
    - Record-Triggered Flow
    - Screen Flow
    - Autolaunched Flow
    - Schedule-Triggered Flow
    - Subflows
  - Approval Processes (Single/Multi-step)
  - Assignment Rules (Lead & Case)
  - Escalation Rules
  - Email Alerts & Templates
- 

## 6. UI Customization

- Page Layouts
  - Record Types
  - Business Processes (Sales, Support, Lead)
  - Compact Layouts
  - Path & Guidance for Success
  - Lightning App Builder (Record Page, Home Page, App Page)
  - Dynamic Forms & Dynamic Actions
  - Global Actions vs Object-Specific Actions
  - Buttons, Links, Quick Actions
- 

## 7. Reports & Dashboards

- Report Types (Standard, Custom, Joined)
  - Report Formats (Tabular, Summary, Matrix, Joined)
  - Filters (Cross Filters, Field-to-Field Filters)
  - Bucket Fields
  - Row-Level Formulas
  - Dashboards (Components, Filters, Dynamic Dashboards)
  - Report & Dashboard Subscriptions
-

## **8. Sales Cloud Features (Admin Scope)**

- Leads & Lead Conversion
  - Campaigns & Campaign Influence
  - Opportunities (Stages, Products, Quotes, Price Books)
  - Forecasting (Collaborative Forecasts)
  - Territory Management
- 

## **9. Service Cloud Features (Admin Scope)**

- Case Management
  - Queues & Assignment Rules
  - Case Escalation Rules
  - Email-to-Case, Web-to-Case
  - Service Console
  - Knowledge Base (Articles, Data Categories)
  - Entitlements & Milestones (SLA)
- 

## **10. Data Security & Compliance**

- Field-Level Security
  - Record-Level Security (Role Hierarchy, Sharing Rules, Teams)
  - Shield Platform Encryption (awareness)
  - Data Masking
  - Audit Trail & Setup Audit Trail
  - Login History
  - GDPR / Compliance Awareness
- 

## **11. AppExchange & Integrations (Admin Level)**

- AppExchange (Install, Manage, Uninstall Apps)
  - Connected Apps & OAuth Basics
  - Email Integration (Outlook, Gmail, Einstein Activity Capture)
  - Salesforce Mobile App (Setup, Compact Layouts, Navigation)
- 

## **12. Environment Management**

- Sandboxes (Dev, Partial, Full, Scratch Org awareness)
- Change Sets (Inbound & Outbound)

- Deployment Basics (Metadata Migration)
  - Salesforce Optimizer
  - App Packaging (Basics)
- 

## 13. Collaboration

- Chatter (Groups, Feed Tracking, Publisher Actions)
  - Slack Integration (awareness)
- 

## 14. Monitoring & Troubleshooting

- Setup Audit Trail
- Debug Logs (for Flows, Automation)
- Login History
- Optimizer Reports
- System Status ([trust.salesforce.com](https://trust.salesforce.com))