⚡ 2-DAY SALESFORCE ADMIN INTERVIEW PREP PLAN

✅ DAY 1 – FOUNDATION & CONFIGURATION

1. What is Salesforce?

- It's a **cloud-based CRM** (Customer Relationship Management) platform.

- Helps businesses manage customers, sales, and services.

- Salesforce Admin: Person who **configures, customizes, and automates** Salesforce without writing code.

---

2. Objects & Fields

- **Objects** = like tables in DB. (Standard: Account, Contact; Custom: Any you create)

- **Fields** = columns of those objects. (Text, Date, Lookup, etc.)

- **Record** = a row in a table.

- 👉 Admin must know how to **create custom objects and fields.**

---

3. Relationships

- **Lookup Relationship** – loose connection (optional).

- **Master-Detail Relationship** – strong connection (child depends on parent).

- **Many-to-Many** – done using a **junction object**.

---

4. Page Layouts, Record Types & Compact Layouts

- **Page Layouts** – control what fields, buttons, sections are shown.

- **Record Types** – different layouts or picklists for different users.

- **Compact Layouts** – summary view in mobile/app.

---

5. Validation Rules

- Ensure data quality using formulas.

Example: ISBLANK(Email) → "Email can't be blank"

---

6. Formula Fields

- Auto-calculate values.

Example: Age = TODAY() - Date_of_Birth

---

7. Automation Tools

Tool	Purpose
Workflow Rules	IF condition → action (limited now)
Process Builder	Visual automation (deprecated slowly)
Flow	Powerful drag-drop logic (USE THIS)
Approval Process	For getting approvals (ex: Leave req)

---

8. Security

- **Profiles** – What users can do (read, edit, delete).
- **Permission Sets** – Add more access on top of profile.
- **Role Hierarchy** – Who can see whose data.
- **Org-wide Defaults (OWD)** – Default access level.
- **Sharing Rules** – Open up access based on criteria.

---

9. Users & Setup

- Create/Edit Users.
- Assign roles, profiles.
- Reset passwords, deactivate, freeze users.

🍥 **End of Day 1 – Quick Revision Topics**

- Object types
- Fields and validation
- Layouts & record types
- Relationships

- Security layers

- Automation intro

✅ **DAY 2 – ADVANCED & INTERVIEW-FOCUSED TOPICS**

1. Flow Builder Deep Dive

- Types of Flows: Screen, Auto-launched, Scheduled, Record-triggered.

- Use Cases: Auto-create tasks, send emails, update records.

---

2. Reports & Dashboards

- **Report Types**: Tabular, Summary, Matrix, Joined.

- Create filters, groupings, charts.

- **Dashboards**: Visual display of multiple reports.

---

3. Data Management

- **Data Import Wizard** – simple tool for small imports.

- **Data Loader** – for bulk data (insert/update/delete/export).

- **Duplicate Rules** & **Matching Rules** – prevent duplicate records.

---

4. Change Management

- **Sandbox**: Test environment.

- **Change Set**: Package changes and deploy from Sandbox to Production.

---

5. AppExchange

- Salesforce marketplace to install apps (free/paid).

- Example: DocuSign, Conga Composer.

---

6. Activity Management

- Log Calls, Tasks, Events.

- Add Email, Notes, Attachments to records.

---

7. Audit & Monitoring Tools

- **Login History**

- **Field History Tracking**

- **Setup Audit Trail**

---

8. Deployment & Backups

- Best practice: Test in Sandbox → Deploy via Change Set.

- Export data regularly for backup.

🧠 **Day 2 – Final Topics to Review**

- Flow builder (hands-on is great!)

- Reports and Dashboards

- Data Import/Export

- Deployment Tools

- Real-time use cases (e.g., approval flows, auto email)

📒 **Bonus: Interview Tips**

- Prepare **real examples**: "I created a flow to auto-create a case on email."

- Know **limits**: Max fields, flows per org, etc.

- Show **clarity**: Interviewers love clean explanations.

Salesforce Admin Interview Concepts - Detailed Guide

---

1. What is Salesforce & Admin Role

- **Salesforce** is a leading cloud-based CRM platform used to manage customer data, automate sales, support, and marketing processes.

- An **Admin** is responsible for setting up users, customizing the platform (without code), ensuring data security, automating processes, and maintaining system integrity.

What interviewers expect:

A clear understanding of the Salesforce ecosystem and the ability to explain why businesses use it.

---

2. Objects & Fields

- **Objects:** These are like database tables. Standard (Account, Contact) or Custom (created by you).

- **Fields:** Attributes/data points on objects (Name, Email, etc.). Types include text, number, formula, checkbox.

- **Records:** A row in a table (i.e., one data entry).

What interviewers expect:

Know how to create custom objects, field types, and when to use formula or lookup fields.

---

3. Relationships in Salesforce

- **Lookup Relationship:** Loose relationship, child doesn't depend on parent.

- **Master-Detail Relationship:** Strong link, child record is deleted if the parent is.

- **Many-to-Many:** Implemented using a **junction object**.

What interviewers expect:

Ability to model real-world relationships using correct field types and relationship settings.

---

4. Page Layouts, Record Types, Compact Layouts

- **Page Layouts:** Control how fields, sections, buttons appear.

- **Record Types:** Allow different page layouts and picklist values for different users.

- **Compact Layouts:** Control what shows in highlights panel (Lightning).

What interviewers expect:

Understanding of when and why to use record types vs. just using layouts.

---

5. Validation Rules

- Enforce data quality by setting logic (formulas) to prevent incorrect data.

- Example: ISBLANK(Email) ensures email isn't empty.

What interviewers expect:

Know how to write and test validation rules and explain use cases from experience.

---

6. Formula Fields

- Read-only fields that calculate values dynamically.

- Example: Age = TODAY() - Date_of_Birth.

What interviewers expect:

Ability to write formulas using functions like IF, AND, OR, TEXT, etc.

---

7. Automation Tools

- **Workflow Rule:** Limited now; one condition = one action.

- **Process Builder:** Visual; allows multiple actions but deprecated.

- **Flow:** Most powerful; supports loops, decisions, CRUD operations.

- **Approval Process:** Route records for approval (e.g., leave request).

What interviewers expect:

Strong understanding of Flow builder. Be ready to explain real use cases.

---

8. Security in Salesforce

- **Profiles:** Define object-level and field-level permissions.

- **Permission Sets:** Add additional access without changing profiles.

- **OWD (Org-Wide Defaults):** Set default record-level access.

- **Role Hierarchy:** Determines visibility up the role tree.

- **Sharing Rules:** Open access to groups based on conditions.

What interviewers expect:

Precise differentiation between these layers and real scenarios using them.

---

9. User Management

- Add/edit/deactivate users.

- Assign profiles, roles, permission sets.

- Troubleshoot login issues.

What interviewers expect:

Knowledge of daily admin tasks and how to handle common user issues.

---

10. Reports & Dashboards

- **Reports:** Tabular, Summary, Matrix, Joined. Grouping, filters, charts.

- **Dashboards:** Visual display from multiple reports, refresh scheduling.

What interviewers expect:

Explain types of reports and how to build and share them effectively.

---

11. Data Management

- **Import Wizard:** Simple import tool, no delete.

- **Data Loader:** Powerful bulk import/export/update/delete.

- **Duplicate Rules:** Prevent creating duplicate records.

What interviewers expect:

Understanding of when to use what tool and how to handle errors.

---

12. Change Management

- **Sandbox:** Test environment.

- **Change Sets:** Package changes and move from Sandbox to Production.

What interviewers expect:

Good deployment strategy and knowledge of testing before going live.

---

13. AppExchange

- Salesforce's app marketplace. Install prebuilt solutions like Docusign.

What interviewers expect:

Familiarity with how and when to use third-party tools.

---

14. Activity Management

- Track Tasks, Events, Log Calls, Notes.

What interviewers expect:

Know how to use and customize these features for productivity.

---

15. Audit & Monitoring

- Login History, Setup Audit Trail, Field History Tracking.

What interviewers expect:

Demonstrate ability to troubleshoot and monitor system usage.