Admin Workshop
Lesson 5

- Salesforce Build for Social
- AppExchange
- Prepare for Admin Certification

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Objective

- Anything we did not finish Lesson 4…
- AppExchange
- Salesforce Built for Social
- Prepare for Admin Certification

Salesforce Built for Social

Video: Burberry's Social Story

Luxury brand Burberry uses salesforce.com platform to deliver rich and exciting retail and runway experiences that are social and mobile first.

http://www.youtube.com/watch?v=DzBIYwZsut0

- Published on Oct 1, 2012
- Published on Sep 23, 2013

The Customer Social Profile

Track information about your customers from inside and outside of your company

- Social feed shows latest collaboration about the customer … in **Chatter**
- Get complete & accurate business data … from **Data.com**
- Get social contact data from twitter & facebook … from **Social Contact**
- Get Sales Opportunity data & key influencers .. from **Sales Cloud**
- Track the latest of customer service issues … in **Service Cloud**
- Listen to the latest social conversions on social networks … with **Social Studio**
- Track use of Social Marketing Apps … with heroku
- Social Products posting need for upgrades or service … with **database.com**

- Customers are posting comments and questions on public social networks like twitter and sharing their “likes” on facebook
- This represents an amazing opportunity to understand the interests and future needs of their customers

The Social Profile

- Heart of the Social Enterprise
- Helps business manage the information they need to have relevant interaction with their customers
- Get a unified view of your customers

Amazing Customer Service = Customer For Life

"Customer Service is the new Marketing" – Lane Becker

77% of people think social will become a leading customer service channel

59% of consumers will switch brands to get better service

73% of consumers spend more when they experience good customer service

81% of Twitter users expect a same day response from companies

- Great Service builds loyalty and trust
- Top performing companies make social customer care a priority

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- App for automatic case creation – AppExchnage: Salesforce for Twitter and Facebook (v4.16.9)

- Add your companies Twitter Account
- Add Twitter Keywords – this is going to bring these conversions into Salesforce

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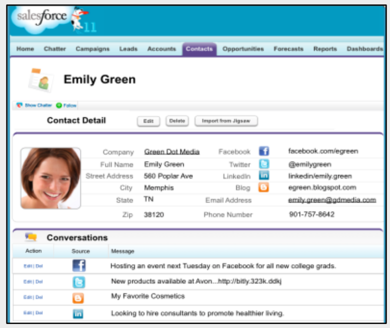
Video: Social for Service Feature Demo

Social for Service lets your agents listen and engage with customers across social channels.

https://www.youtube.com/watch?v=spxe0DWwmxI

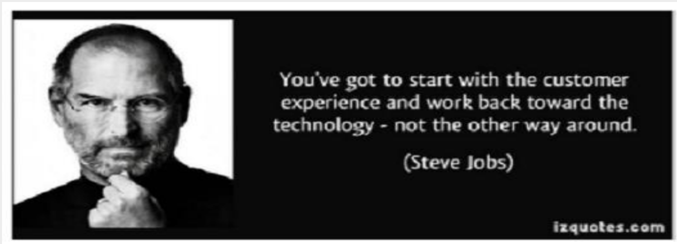
The Key to Delighting Customers: Common Social Profile

- Customers are posting comments and questions on public social networks like twitter and sharing their “likes” on Facebook
- This represents an amazing opportunity to understand the interests and future needs of their customers
- Find out who they are
- Build a common social profile
- Create unique experiences for them
- Build your brand



The Social Contact Center

- The social contact center strives to improve agent productivity, reduce costs, and increase customer experience and satisfaction
- Traditional differentiator s like price, promotion and product s are increasingly indifferent and Customer Service / Experience is the new differentiator & currency



- Listen & Engage on Social Media (Facebook & Twitter Integration)
- Social Hub – allows us to create the business rules to route cases
- Collaborative Case Swarming – get the right answer to the customer the first time

- Call centers provide support through support agents who capture and follow cases in real-time, use a SF knowledgebase, and collaborate through Chatter to resolve cases.
- Contact Center can also track conversations across all social networks an allows for in-channel response.

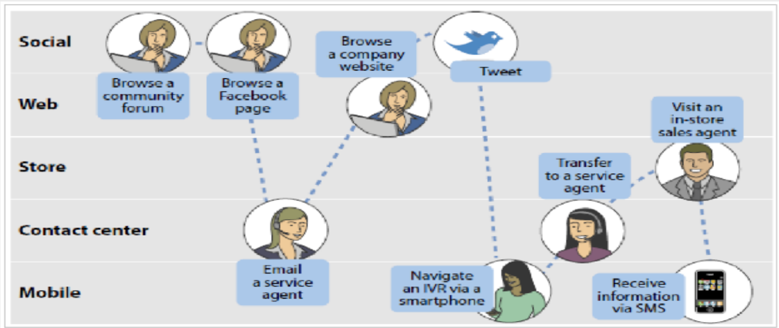
Video: Social Studio Videos

Salesforce Built for Social – The Comcast Story
http://www.youtube.com/watch?v=bPt5LTYx-pQ&feature=youtube_gdata

Social Studio Novemer 15 Release Overview
https://www.youtube.com/watch?v=GYRKuqPMeBA

The Social Contact Center

- Provide consistent customer engagement & support across all channels



- Monitor and manage customer interactions across every social channel by using real-time reports and customizable dashboards of Social Analytics

- Boundaries between inactions are blurring
- New patterns of engagement are emerging that cut across multiple touch points

AppExchange

AppExchange

- The Salesforce AppExchange is the destination for great business apps.
- Extend your success in the cloud with the AppExchange, salesforce.com's marketplace of business applications and consulting partners. Find, evaluate and install solutions for every department and industry.
- Browse hundreds of applications for CRM and beyond.
- Find system integrators and custom app developers that can help.
- Learn how to deliver and market your app or consulting service on the AppExchange.
- https://appexchange.salesforce.com/gettingstarted

Certification Prep

About the Exam

60 multiple-choice questions
90 minutes allotted to complete the exam
65% is the passing score
Registration fee is USD 200
Retake fee is USD 100
No hard-copy or online materials may be referenced during the exam
Available in English, French, German, Spanish and Brazilian Portuguese, additional details here
No prerequisites; Administration Essentials for New Admins (ADM 201) course is recommended
For a full exam outline, click here for the Study Guide

Questions, Topics and Weightage

Exam is comprehensive; you will need experience with all of the topics listed in the study guide. Topics are "weighted" – topics with the heaviest "weight" are the most significant and appear more frequently on the exam.

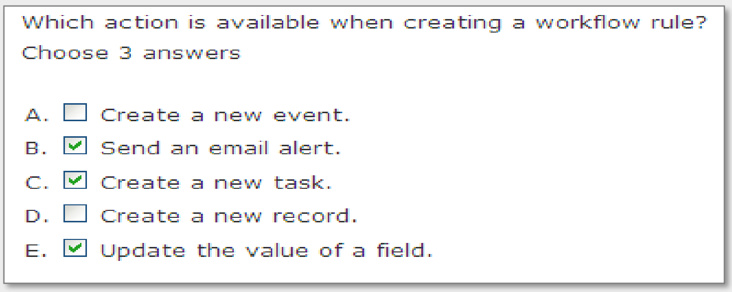
Organization Setup	1%
User Setup	9%
Global User Interface	1%
Security and Access	15%
Standard & Custom Objects	18%
Sales Cloud Applications	9%
Service Cloud Applications	6%
Activity Management	3%

Chatter	1%
Data Management	11%
Content & Folder Management	2%
Analytics – Reports & Dashboards	13%
Workflow Automation	7%
Desktop & Mobile Administration	2%
AppExchange	2%

Questions, Topics, and Weighting

- Each question is worth one point, and there is no partial credit given for multi-select questions.

Questions are multiple-choice or multiple-select; there are no essay questions or simulations.
Multiple-select items will tell you how many answer options to select.


Which action is available when creating a workflow rule?
Choose 3 answers

A. ☐ Create a new event.
B. ☑ Send an email alert.
C. ☑ Create a new task.
D. ☐ Create a new record.
E. ☑ Update the value of a field.

Administrator Exam

Advanced Administrator

CERTIFIED
SALESFORCE
ADMINISTRATOR

The Salesforce.com Certified Administrator exam is intended for an individual who has experience performing as a Salesforce Administrator. Here are examples of the concepts you should understand to pass the exam:

- Manage users, data, and security
- Maintain and customize Sales Cloud and Service Cloud applications
- Build reports, dashboards, and workflow

http://certification.salesforce.com/administrators

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Questions, Topics and Weightage

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- Questions are multiple-choice or multiple-select; there are no essay questions or simulations.
- Multiple-select items will tell you how many answer options to select.

Universal Containers needs to automate an outbound telesales contact center. The sales representatives will contact leads based on lists provided to them.

Which integration would drive efficiency in the contact center?
Choose 2 answers

A. ☑ Predictive dialer
B. ☐ Order management
C. ☐ Warranty system
D. ☑ Click-to-dial

Maintain Your Credentials

- You must maintain the prerequisite credential – **Salesforce.com Certified Administrator** – in order to keep your Certified Service Cloud Consultant credential current.
- Complete release-specific, online exams for each major Salesforce release.
- Exam cost includes access to Release Training and the associated maintenance exams for 1 year.
- You will be charged a maintenance fee of $100 when registering for every third release exam to keep the credential current for the following year.
- You will be notified automatically when release content and exams become available.

Register for the Exam

- Register to take the proctored exam at testing centers worldwide.
- Online proctoring is also available.
- You can only register for exams for which you meet the prerequisite.

Register @: www.webassessor.com/salesforce

Request extra 30 min by sending an email: certification@salesforce.com Email the code for the exam, type of exam, date, time and location.

- As a non-native English speaking student you can, after registering for the exam at Webassessor request extra 30 min by sending an email: certification@salesforce.com
- Please email them the code for the exam, type of exam, date, time and location.

A Look at the Study Guide

The study guide:

- Defines the target audience.
- Lists all study material (courses, documents, etc.).
- Lists the topics covered on the exam.
- Indicates the percentage of the exam dedicated to each topic.
- Includes sample questions.

http://certification.salesforce.com/administrators

- http://certification.salesforce.com/implementation-experts

Getting the most out of the Study Guide

The study guide is a tool that enables you to:

Understand the skills and experience required.

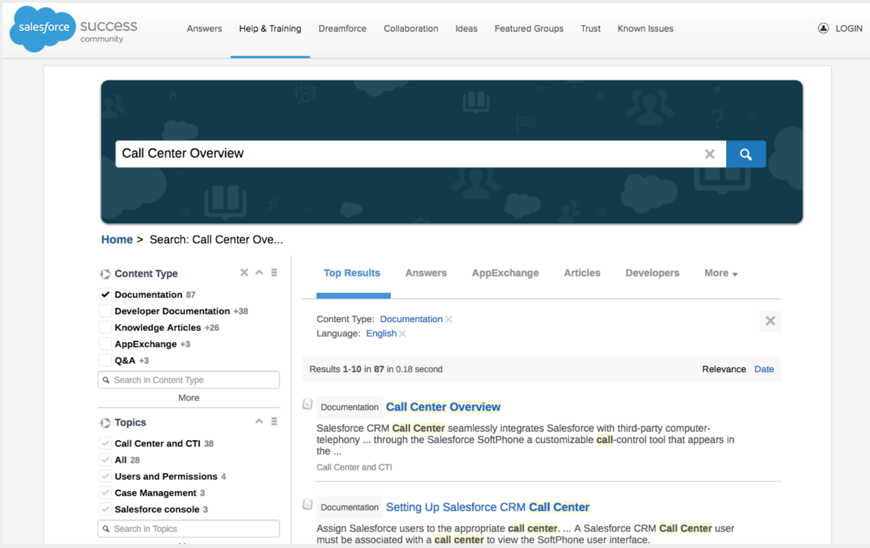
Understand what to expect on the certification exam.

- Evaluate your readiness by reviewing the objectives to determine those you have already mastered and those you still need to prepare for.

You will be tested on all of the areas listed in the objectives. Use them to focus your study time on the least familiar ones.

- Utilize online training.
- Search for relevant documentation, tips sheets, and user guides on the Help site
- Utilize **Help & Training** link on help.salesforce.com

Search for Documentation on the Help Site

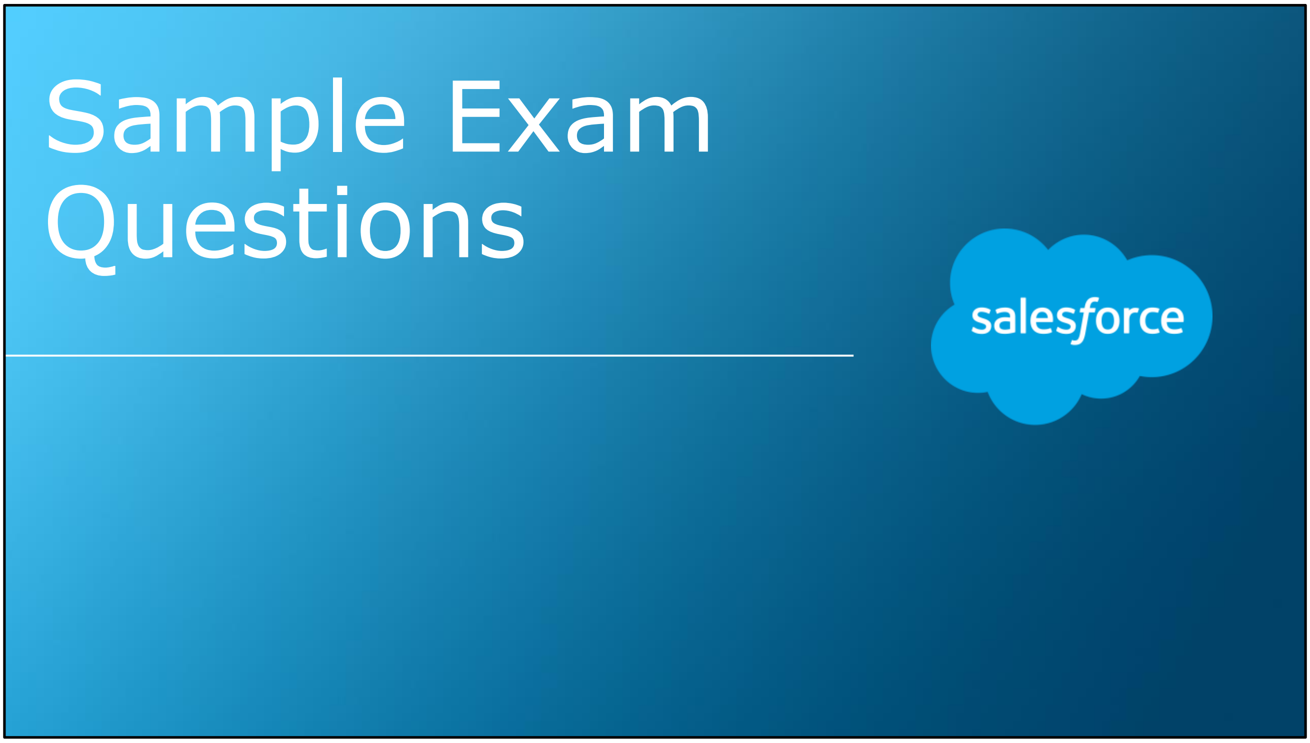


https://help.salesforce.com/

Test taking strategies

- Read question (don’t look at answers), think about your answer, then look at the options and choose the best one(s)
- Process of elimination
- Read and re-read the questions CAREFULLY!
- Come back to questions you aren’t sure of

- ***<This slide should not be presented during the recording session>***



- **Sample Exam Questions**

Which report type provides a simple list of data with no subtotals?

A. Matrix
B. Summary
C. Tabular
D. Custom
E. Standard

- C

Use Custom Summary Formulas to create calculated summaries on numerical fields in __________ and _________ reports.

A. Tabular and Summary

B. Custom and Standard

C. Summary and Matrix

D. Matrix and Tabular

C

Which statement about custom summary formulas is true?

A. Reports can be grouped by a custom summary formula result
B. Custom summary formulas can reference a formula field within a report
C. Custom summary formulas can reference another custom summary formula
D. Custom summary formulas can be used in a report built from a custom report type

- B & D

The following are true about scheduling and emailing reports.

A. The running user determines whose data is visible on the report.

B. The running user must have access to the folder in which the report is saved.

C. All email recipients must have access to the same folder.

D. The report is emailed within 30 minutes of the Preferred Start Time

E. All of the above

- E

A Dashboard is a visual representation of data from multiple reports and (choose all that apply)

A. Is comprised of up to 20 components

B. Displays data from standard reports

C. Has a running user to determine what data is visible

D. Displays data as of the last time the dashboard was refreshed

E. Always shows up to date data

F. Can be scheduled to be refreshed and emailed automatically

- A, C, D, F

Users can post a static image of a component to the dashboard feed, a user feed or a group feed, this feature is called

A. Dashboard Component Snapshot
B. The Running User
C. Chatter Groups
D. Dashboard Component
E. Dynamic Dashboards

A

Dynamic Dashboards allow data to be displayed by the user viewing it, rather than by a specified running user – eliminating the need to create the same dashboard for multiple users.

A. True

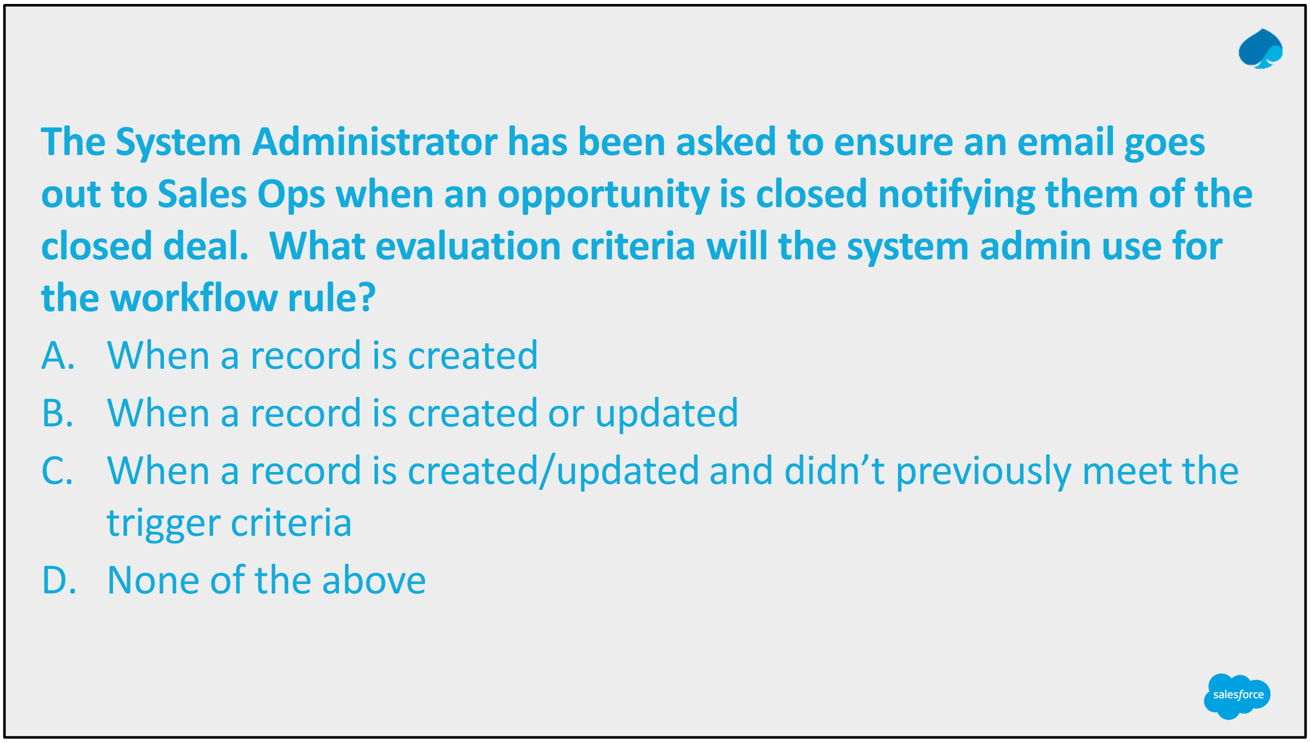
B. False

- A

A Sales VP wishes to view Dashboard data by region within his territory – what feature will allow this?

A. Dynamic Dashboards
B. Dashboard Filters
C. Dashboard Snapshots
D. This is not possible

- B


The System Administrator has been asked to ensure an email goes out to Sales Ops when an opportunity is closed notifying them of the closed deal. What evaluation criteria will the system admin use for the workflow rule?
A. When a record is created
B. When a record is created or updated
C. When a record is created/updated and didn't previously meet the trigger criteria
D. None of the above
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- C

The support team has asked the System Administrator to automate the notification of a customer's support plan ending – they would like for the Customer Support Rep to receive an email 30 days before the Support Plan Expires (Support Plan Expiration Date is on the Account record). What will the system administrator do?

A. Create a workflow rule with a time-based trigger to fire 30 days before the Support Plan Expiration Date and use an email action to notify the assigned Support Rep

B. Create a workflow rule with an immediate action to email the Support rep but with a due date of 30 days before the Support Expiration Date

C. Create an Apex trigger to fire 30 days before Support Plan Expiration Date and use an email action to notify the assigned Support Rep

D. This cannot be done

- A

The system administrator was testing workflow rules and needs to delete pending time-based workflow actions. How can he/she do this?

A. Delete the workflow rule
B. Deactivate the workflow rule
C. Delete the actions in the Time-based Workflow queue
D. Reset passwords for all users of the org
E. None of the above

- C

What feature would a system administrator implement to allow AW Computing's prospects/customers to complete a form on the corporate website and have that data automatically become a lead in Salesforce?

A. Auto Response Rules

B. Assignment Rules

C. Web-to-Lead

D. Escalation Rules

- C

When a Lead is converted, an Account, Contact and ________ record are created.

A. Lead
B. Case
C. Campaign
D. Opportunity

- D

Queues can be made up of the following:

A. Users
B. Public Groups
C. Roles
D. Profiles
E. External Chatter Users

- A, B, C

Assignment rules allow Leads and Cases to be automatically assigned to users and queues based on criteria defined by the system administrator.

A. True

B. False

- a

The system administrator needs to ensure that all Leads coming from the website are assigned a website lead queue, that all Leads for a recent trade show are assigned to Matt Wilson and all other leads are assigned to Phil Smith. The system administrator will

A. Create 3 assignment rules
B. Create 1 assignment rule with multiple criteria entries
C. Create an assignment rule and 2 workflow rules
D. Use workflow rules to accomplish this

- B

Auto response rules can be used to send an automated yet tailored response to customers based on the information they provide via the Web-to-lead form.

A. True

B. False

- A

When Chatter is enabled in an org, the following happens (choose all that apply).

A. The Chatter app is added to the Force.com app menu
B. The Chatter tab is added to all standard apps
C. Accounts, Contacts, Cases, Leads and Opportunities are enabled for Chatter
D. All users are added to the All Chatter group
E. All of the above

- A, B, C

The Chatter Free license gives users the ability to access People, Profiles, Groups and Files as well as (choose all that apply)

A. Make posts

B. View comments

C. Upload files

D. Join groups

E. View records

- A, B, C, D

Chatter External license allow users outside the company to join public Chatter groups.

A. True

B. False

- B

Who can invite Chatter customers into a Chatter group?

A. The system admin
B. Group owner
C. All Chatter users
D. None of the above

- A & B

Folders are used to organise the following (choose all that apply)

A. Dashboards

B. Reports

C. Documents

D. Email templates

E. All of the above

F. None of the above

- E

The ________ determines if a user can read, create and edit Contact records; the ___________ determines if he can see/edit contact records owned by his subordinates.

A. Role, Profile

B. OWD, Sharing rules

C. Sharing rules, Role Hierarchy

D. Profile, Role

- D

The page layout allows users to see the Next Steps field on an Opportunity record; Field Level Security dictates that the field is hidden, how will the field appear to the user?

A. The field will be hidden from the user

B. The field will be read only

C. The field will be visible and editable to the user

D. None of the above

- A

Record types specify the following elements:

A. Picklist values
B. Page layouts
C. Business processes
D. All of the above
E. None of the above

- D

Which objects support business processes?

A. Opportunities
B. Leads
C. Campaigns
D. Accounts
E. Solutions
F. Cases
G. Contacts

- A, B, E, F

Lead assignment rules assign leads to owners and queues based on the criteria the system admin specifies within the rule.

A. True

B. False

- A

Which of the following are actions triggered by workflow rules?

A. Email
B. Task
C. Field update
D. Record update
E. Record creation
F. Outbound message
G. Time trigger

- A, B, C, F

Quizlet – Test Quesitons

Use the following quizlet for a bank of questions - Link

Thank you