Unit 1: Study Up on Security and Access

Learning Objectives

After completing this unit, you'll be able to:

- Explain the various organization security controls.
- Given a user request scenario, apply the appropriate security controls based on the features and capabilities of the Salesforce sharing model.
- 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.

Key Topics

This unit prepares you for the security and access section of the Salesforce Administrator exam, which makes up 13% of the overall exam. This section of the exam tests these topics.

- Passwords
- IP restrictions
- Identity confirmation
- Network settings
- Organization-wide defaults
- Roles and role hierarchy
- Manual sharing
- Sharing rules
- Public groups
- Profile settings
- Profile permissions
- Permission sets
- Communication folder settings
- Report folder settings
- Dashboard folder settings

This unit provides a number of interactive, real-world, scenario-based questions that are a lot like the ones you'll encounter as a Salesforce administrator. Looking at these scenarios helps prepare you to take this security and access section of the Salesforce Administrator exam. As you tackle the practice questions, you get immediate feedback on your answers, along with detailed information on why your answers are correct (or incorrect).

The unit also contains interactive flashcards to help you prepare for the security and access section of the exam.

Download the Guide

Would you like a hard copy of the contents in these modules? Each module includes a link to a printable version you can download. Download the Administrator Certification Prep: Security and Data Management guide.

Administrator Certification Prep: Security and Data Management

Note: For more information on the Salesforce Administrator Certification exam prep, logistics and policies, and maintenance, see the Get Started with Administrator Certification Prep unit in the Administrator Certification Prep: Setup and Objects module.

Exam Practice Questions

Ready to jump in? The sample tool below is not scored—it's just an easy way to quiz yourself. To use it, read the scenario on the left side, then click on the answer you think is correct. Some questions may have more than one correct answer. Click submit, and you get a pop-up telling you whether the answer you chose is correct or incorrect, and why. When you reach the end, you can review the answers or retake the questions.

Scenario 1

The Executive Team at Ursa Major Solar is exploring ways to increase protection of the organization's Salesforce data from unauthorized access. It has been proposed to leverage the Trusted IP Ranges feature.

What is a benefit of entering Trusted IP ranges in the network access section?

ANSWER	FEEDBACK
A. USERS WHO LOG IN WITHIN THE NETWORK ARE NOT REQUIRED TO VERIFY THEIR IDENTITY	**Correct. Users logging in via the company network, a trusted IP range, are not required to verify their identity.**
B. ALL ATTEMPTS TO LOG IN FROM OUTSIDE THE NETWORK ARE DENIED	Incorrect. Users are still able to log in from addresses outside the Trusted IP Ranges through the activation process.
C. USERS ARE UNABLE TO LOG IN THROUGH THE API ON NETWORKS NOT MARKED AS TRUSTED	Incorrect: Users are still able to log in from addresses outside the Trusted IP Ranges through the activation process.
D. APPEXCHANGE PACKAGES CAN COMMUNICATE WITH AN EXTERNAL SITE.	Incorrect: Trusted IP Ranges do not affect AppExchange packages.

TRAILHEAD

Scenario 2

Ursa Major Solar uses a hybrid sharing model where contacts and accounts are read only and opportunities and cases are private. The Account Executive (AE) team owns all the accounts. Some contacts are owned by AEs, and other contacts are owned by support reps.

How should the system administrator ensure the AEs can edit all the contacts associated with their accounts, no matter who owns the contact?

ANSWER	FEEDBACK
A. ACCOUNT OWNER PRIVILEGES GIVE THE AE EDIT ACCESS TO ALL RELATED RECORDS BY DEFAULT.	Incorrect. Account owner privileges do not inherently give edit access to all related records.
B. SELECT THE EDIT ALL ASSOCIATED CONTACTS OPTION FOR THE AE ROLE IN THE ROLE HIERARCHY.	**Correct. The Role Hierarchy menu has a checkbox to allow editing of all associated contacts option.**
C. CREATE A PRIVATE CHATTER GROUP FOR AES AND SUPPORT REPS TO SHARE RELEVANT DATA.	Incorrect. Being part of a private Chatter group does not grant read/write access to objects that are otherwise restricted.
D. USE THE MASS TRANSFER TOOL TO TRANSFER OWNERSHIP OF ALL CONTACTS TO THE AES.	Incorrect: AEs need to be able to edit contacts associated to only their accounts, not all contacts.

Scenario 3

The password policy in Ursa Major Solar's org shows that the length of time until passwords expire is 60 days. However, sales reps are complaining that their passwords expire every 30 days.

Where should the system administrator change the password expiration period for the sales rep users?

ANSWER	FEEDBACK
A. INDIVIDUAL USER RECORDS	Incorrect. Password expiration is not accessible in a user's individual record.
B. PERMISSION SETS ASSIGNED TO THE USERS	Incorrect. A permission set is a collection of settings and permissions that give users access to various tools and functions. Password expiration is not one of those functions.
C. PROFILES ASSIGNED TO THE USERS	**Correct: Since the issue is affecting users with the same profile, the password expiration should be adjusted for the profile used by the sales reps.**
D. ROLES ASSIGNED TO THE USERS	Incorrect: Roles affect access on key components such as records and reports, not a setting such password expiration.

TRAILHEAD

Administrator Certification Prep: Security and Data Management

Scenario 4

Ursa Major Solar's vice president of global Sales has requested that the sales rep commission report be visible to the executive team.

How should the system administrator provide visibility to the sales rep commission report to the executive team only?

ANSWER	FEEDBACK
A. SET OPPORTUNITY ORG-WIDE DEFAULT SHARING SETTINGS TO PRIVATE.	Incorrect. Setting the opportunity object to Private makes all opportunity records visible only to record owners and those above them in the role hierarchy. This would have a greater effect on the org than needed.
B. SAVE THE REPORT IN A FOLDER SHARED WITH THE EXECUTIVE TEAM.	**Correct. Access to folder contents can be controlled based on roles, permissions, public groups, and license types**.
C. NAME THE REPORT "FOR EXECUTIVE TEAM USE ONLY - DO NOT USE."	Incorrect. While including the phrasing "do not use" in the folder name may deter some users, it is not a secure option.
D. SAVE THE REPORT IN THE MY PERSONAL REPORTS FOLDER.	Incorrect. As the My Personal Reports folder name implies, this report folder is inherently visible only to you. So, this doesn't meet the criteria of providing visibility to the Executive team.

TRAILHEAD

Administrator Certification Prep: Security and Data Management

Exam Topic Flashcards

The following flashcards cover security controls, profiles, permission sets, and report folder sharing. Use these interactive flashcards to brush up on some of the key topics you'll find on this part of the exam.

Read the question or term on each card, then click on the card to reveal the correct answer. Click the right-facing arrow to move to the next card, and the left facing arrow to return to the previous card.

Question/Term	Answer/Definition
How can a system administrator discover who added a field to the account page layout?	Use the Setup Audit Trail.
Ursa Major Solar uses a private sharing model for cases. Each product line has several product specialists who want to have visibility to all cases involving their product line. **How should the administrator meet this requirement?**	Create a predefined case team for each group of product specialists and assign the team using Case Assignment Rules.

TRAILHEAD

Ursa Major Solar uses a custom object within the product development team. Product development, executives, and administrators should be the only users with access to records of this object. Product development needs read/write access to all the records within the object, while the executives should be able to view only the records. **How can the administrator configure the security model to meet these requirements?**	Set the organization-wide defaults for the custom object to Public Read Write. Give the Product Development Profile Read, Create, and Edit permissions. Give the Executive Profile Read Only permissions for that object.
Ursa Major Solar created a new custom object to track Inventory items. The support team cannot see the Inventory object's tab. **What two settings should the system administrator check to find the cause of the problem? (Choose two answers.)**	Support team profiles Support team permission sets

Ursa Major Solar has three account record types: Prospect, Customer, and Vendor. The Customer record type is only for accounts that have a Closed Won opportunity. **How should a system administrator prevent users from selecting the Customer record type when they create new account records?**	Remove the Customer record type as an Assigned record type in the users' profiles and permission sets.
A system administrator cannot share a report folder. **What is a possible reason?**	The folder is private.
Sharing Rules	Sharing rules give chosen users greater access by making automatic exceptions to your org-wide sharing settings. Use sharing rules to extend sharing access to users in public groups, roles, or territories.

TRAILHEAD

Role Hierarchy	Salesforce offers a user role hierarchy that you can use with sharing settings to determine the levels of access that users have to your Salesforce org's data. Roles within the hierarchy affect access on key components such as records and reports.
Organization-wide Sharing Default (OWD)	Defines the default access level for an object's records with organization-wide sharing settings. Organization-wide sharing settings can be set separately for custom objects and many standard objects, including assets, campaigns, cases, and accounts and their contracts.

TRAILHEAD

Administrator Certification Prep: Security and Data Management

Related Badges

Looking for more information? Explore these related badges.

Badge	Content Type
Data Security	Module
Protect Your Data in Salesforce	Project
Reports & Dashboards for Lightning Experience	Module
Create Reports and Dashboards for Sales and Marketing Managers	Project

Congratulations! You've studied up on security and access. Up next, dive into the exam section on data management. Let's go!

TRAILHEAD

Unit 2: Review Data Management

Learning Objectives

After completing this unit, you'll be able to:

- Describe the considerations when importing, updating, transferring, and mass deleting data.
- Given a scenario, identify tools and use cases for managing data.
- Describe the capabilities and implications of data validation tools.
- Describe the different ways to back up data.

Key Topics

This unit prepares you for the data management section of the Salesforce Administrator exam, which makes up 10% of the overall exam. This section of the exam tests these topics.

- CSV files
- Data quality
- Field mapping
- Record IDs
- External IDs
- Duplicate records
- Data Loader
- Data Import Wizard
- Data export service
- Exports

Like the previous units, this unit contains practice scenario-based questions and flashcards.

Exam Practice Questions

Ready to jump in? The sample tool below is not scored—it's just an easy way to quiz yourself. To use it, read the scenario on the left side, then click on the answer you think is correct. Some questions may have more than one correct answer. Click submit, and you get a pop-up telling you whether the answer you chose is correct or incorrect, and why. When you reach the end, you can review the answers or retake the questions.

Scenario 1

Ursa Major Solar regularly imports accounts from an external order system that has its own ID field for each record.

What should the system administrator do to help prevent duplicates during these imports?

ANSWER	FEEDBACK
A. IMPORT THE DATA USING THE DATA LOADER.	Incorrect. Just using the Data Loader to import data does not prevent duplicates.
B. USE THE ID FROM THE ORDER SYSTEM IN PLACE OF THE SALESFORCE ID.	Incorrect. Each record in a Salesforce org requires a unique Salesforce ID. An external ID cannot be used in place of the Salesforce ID.
C. CREATE A UNIQUE EXTERNAL ID FIELD ON ACCOUNTS IN SALESFORCE FOR MATCHING.	**Correct: Creating a unique external ID field on accounts would guarantee no duplicates from an external order system.**
D. CREATE A FORMULA FIELD THAT IDENTIFIES MATCHES.	Incorrect. A formula field only works on data already imported into the org. Since the goal is to prevent data duplication before being imported, the formula field does is not an accurate solution.

TRAILHEAD

Scenario 2

The sales operations team at Ursa Major Solar needs to import and export accounts, contacts, opportunities, and orders.

Which profile permissions do the sales operation team need to be able to perform this task? (Choose two answers.)

ANSWER	FEEDBACK
A. API ENABLED	**Correct. To use the Data Loader for importing and exporting accounts, contacts, opportunities, and orders the profile permissions need API enabled.**
B. MODIFY ALL FOR THOSE OBJECTS	**Correct. The Modify All setting on accounts, contacts, opportunities, and orders objects means users with this permission can view, edit, and delete all records regardless of sharing. This meets the need of importing and exporting on just the stated objects.**
C. VIEW ALL DATA	Incorrect: View all data would give access to more objects than just accounts, contacts, opportunities, and orders.
WEEKLY DATA EXPORT	Incorrect: Weekly data export generates backup files of the data on a weekly basis depending on the edition. This does not meet the stated need of the sales operations team.

Scenario 3

The director of operations at Ursa Major Solar has noticed that when sales reps move opportunities to the closed stage, they don't always fill in the product installation date. When the date is not logged, the operations team has to reach out to the sales rep to confirm the installation date. The director of operations has requested that sales reps not be able to close an opportunity without first logging the product installation date.

Which feature allows Ursa Major Solar to require a value in the product installation date, a custom date field, when the opportunity stage changes to Closed?

ANSWER	FEEDBACK
A. VALIDATION RULE	**Correct: Validation rules can be used to make fields conditionally required based on the opportunity stage.**
B. DEPENDENT PICKLIST	Incorrect: A dependent picklist is a custom or multi-select picklist for which the valid values depend on the value of another field, called the controlling field. A dependent picklist is not inherently required so would not meet the requirements of the situation.
C. PAGE LAYOUT	Incorrect: While page layouts can determine which fields are required, they can't be set up to be conditional based on the stage.
D. RECORD TYPE	Incorrect: A record type allows users to select different page layouts and picklist values for different business scenarios, based on their profiles. Record type can not be used to require a date field to be entered when the stage is set to closed.

TRAILHEAD

Scenario 4

The VP of marketing at Ursa Major Solar loaded leads into the org and now realizes they need to be deleted. The VP has asked the system administrator to delete them.

Which best practices are recommended prior to mass-deleting records? (Choose two answers.)

ANSWER	FEEDBACK
A. DOWNLOAD A SETUP AUDIT TRAIL FOR THE LAST SIX MONTHS BEFORE DELETION.	Incorrect: The Setup Audit Trail is a history of the 20 most recent setup changes made to the org. It's not a data backup.
B. SCHEDULE A WEEKLY DATA EXPORT AND DOWNLOAD THE BACKUP ZIP FILES.	**Correct. Scheduling a weekly data export and downloading the backup zip file is a best practice. This is recommended just in case the system administrator accidentally deletes leads beyond the expected.**
C. CREATE A NEW LIST VIEW FOR ALL RECORDS THAT NEED TO BE DELETED.	Incorrect. A new list view only creates a new view of the records, not a data management best practice.
D. RUN AND EXPORT A REPORT TO ARCHIVE DATA BEFORE DELETION.	**Correct: Running and exporting a report to archive data before deletion is a best practice. This is recommended just in case the system administrator accidentally deletes leads beyond the expected.**

Administrator Certification Prep: Security and Data Management

Exam Topic Flashcards

The following flashcards cover importing data, managing data, data validation, and ways to back up data. Use these interactive flashcards to brush up on some of the key topics you'll find on this part of the exam.

Read the question or term on each card, then click on the card to reveal the correct answer. Click the right-facing arrow to move to the next card, and the left facing arrow to return to the previous card.

Question/Term	Answer/Definition
How long is data stored in the Recycle Bin?	Up to 15 days
Ursa Major Solar has inconsistent data in its 20,000 existing accounts and asked the system administrator to convert all of the standard country fields to ISO codes. **Which method should the system administrator use?**	Mass update addresses
Which set of Salesforce records is exported by choosing the Export All option instead of Export in Data Loader?	Records for a specified object including records in the recycle bin

TRAILHEAD

A system administrator uses the Import Wizard to update existing Account records. **Which two values can the Import Wizard use to find matching records?**	Account Name Site fields
Which configuration option shows sales representatives the fields they must fill in prior to saving an opportunity?	Page Layout required fields
Lookup Filter	Lookup filters are administrator settings that restrict the valid values and lookup dialog results for lookup, master-detail, and hierarchical relationship fields. For example: Restrict the Account Name field on opportunities to allow only active accounts.
Data Import Wizard	The Data Import Wizard is a tool to import data for many standard Salesforce objects, including accounts, contacts, leads, solutions, campaign members, and person accounts. You can also import data for custom objects. You can import up to 50,000 records at a time.

TRAILHEAD

Validation Rules	Validation rules verify that the data a user enters into a record meets the standards you specify before the user can save the record.
Data Loader vs. Import Wizard	Use Data Loader when: • You need to load 50,000 to 5,000,000 records. Data Loader is supported for loads of up to 5 million records. • You want to schedule regular data loads, such as nightly imports. • You want to export your data for backup purposes. Use the import wizard when: • You're loading less than 50,000 records. • You want to prevent duplicates by uploading records according to account name and site, contact email address, or lead email address.
CSV File	A Comma Separated Values (CSV) file is a plain text file that contains a list of data. CSV files are an accepted file format for Data Loader and Data Import Wizard.

TRAILHEAD

Related Badges

Looking for more information? Explore these related badges.

Badge	Content Type
Data Quality	Module
Improve Data Quality for Your Sales and Support Teams	Project
Data Management	Module
Import and Export with Data Management Tools	Project

Congratulations. You've covered over 20% of the Administrator Certification test material in this badge. You are well on your way.

You've reviewed these sections.
- Security and access
- Data management

TRAILHEAD

- Be sure to review the other three Administrator Certification Prep badges. Good luck on your exam!

TRAILHEAD