Guide de Révision - Certification Administrateur

Certification Administrateur

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Salesforce Admin Certification Study Guide

Data and Analytics Management: 17%

■ DATA MANAGEMENT OVERVIEW

Why Data Management Matters:

- **Salesforce is only as good as the data you put into it**

- Clean, accurate data = Better insights and decisions

- Poor data quality = Wasted time, lost opportunities, damaged trust

- Data is the foundation for reports, dashboards, and business intelligence

Exam Focus Areas:

1. **Data Operations** (Import, Export, Update, Delete, Backup)

2. **Data Quality** (Validation, Duplicate Management)

3. **Reports** (Formats, Custom Report Types, Formulas, Limitations)

4. **Dashboards** (Components, Filters, Running User, Dynamic Dashboards)

■ DATA IMPORT & EXPORT TOOLS

Tool Comparison: Data Import Wizard vs. Data Loader

Critical Exam Topic: Know which tool to use when!

Feature	Data Import Wizard	Data Loader
Location	Web-based (Setup)	Desktop application (requires installation)
Max Records	50,000 per import	5,000,000 per operation
Operations	Insert, Update, Upsert	Insert, Update, Upsert, Delete, Export, Export All
Objects Supported	**LIMITED:** Accounts, Contacts, Leads, Solutions, Campaign Members, Person Accounts, Custom Objects	**ALL:** All standard and custom objects

| **Notable Exclusions** | **CANNOT import:** Opportunities, Cases, Products, Contracts | Can import ALL objects |

| **Automation** | No (manual only) | Yes (CLI for scheduling) |

| **Duplicate Detection** | Built-in duplicate checking | No automatic duplicate checking |

| **Best For** | Small, simple imports | Large, complex data operations |

| **API Required** | No | Yes (requires API access) |

| **Skill Level** | Beginner-friendly | Advanced users |

| **Export Capability** | **NO** export function | Yes (Export & Export All) |

Data Import Wizard

When to Use:

- ■ Importing < 50,000 records

- ■ Simple imports (Accounts, Contacts, Leads)

- ■ One-time manual imports

- ■ Users with no API access

- ■ Quick imports with built-in duplicate checking

Supported Objects (Mnemonic: "C-CLASS"):

- **C**ampaign Members

- **C**ontacts

- **C**ustom Objects

- **L**eads

- **A**ccounts

- **S**olutions (plus Person Accounts)

Limitations:

- Cannot import Opportunities, Cases, Products

- Cannot export data

- Cannot delete records

- Cannot schedule automated imports

- 50,000 record limit

Access: Setup → Data Import Wizard

Steps:

1. Choose object to import (Accounts, Contacts, Leads, etc.)
2. Upload CSV file
3. Map CSV columns to Salesforce fields
4. Review and confirm mapping
5. Import (with duplicate checking option)

Data Loader

When to Use:

- ■ Importing > 50,000 records
- ■ Exporting data
- ■ Deleting records in bulk
- ■ Importing Opportunities, Cases, Products, Contracts
- ■ Scheduling automated imports/exports
- ■ Complex data migrations

Operations:

- **Insert:** Add new records
- **Update:** Modify existing records (requires Record ID)
- **Upsert:** Insert new + update existing (requires External ID)
- **Delete:** Remove records (soft delete to Recycle Bin)
- **Hard Delete:** Permanently delete (bypasses Recycle Bin)
- **Export:** Extract data to CSV
- **Export All:** Export including deleted/archived records

Access: Setup → Data Loader → Download

Installation Required: Yes (Windows or Mac application)

Automation: Command Line Interface (CLI) for scheduled jobs

Data Export (Scheduled Backup)

Purpose: Regular backup of ALL Salesforce data

Availability:

- **Weekly exports:** Enterprise, Performance, Unlimited, Developer Editions
- **Monthly exports:** Professional Edition

What Gets Exported:

- All objects and records
- All fields (including attachments in separate file)
- Files and documents
- Chatter data

Access: Setup → Data Export

Process:

1. Choose export frequency (weekly or monthly if available)
2. Select objects to include
3. Choose file format (CSV recommended)
4. Schedule export
5. Receive email when ready (valid for 48 hours)

Exam Tip: Data Export is the ONLY way to schedule automated backups

■ DATA VALIDATION & QUALITY

Validation Rules

Purpose: Ensure data meets quality standards BEFORE saving

When They Run: Step 6 in Order of Execution (after before-save flows, before save to database)

Key Components:

- **Formula:** Boolean expression (TRUE = error, FALSE = save allowed)

- **Error Message:** What user sees when validation fails

- **Error Location:** Top of page or specific field

Common Use Cases:

- Required fields (beyond standard required)

- Data format validation (email, phone, ZIP code)

- Business logic (discount cannot exceed 20%)

- Cross-field validation (End Date must be after Start Date)

- Conditional requirements (if A is selected, B is required)

Best Practices:

- Clear, specific error messages

- Test thoroughly

- Consider user experience

- Don't over-validate (frustrates users)

- Use field-level required when possible (faster)

Exam Scenario:

- "Prevent opportunities > $100K from being saved without manager approval field"

- Answer: Validation rule: `AND(Amount > 100000, ISBLANK(Manager_Approval__c))`

Duplicate Management

Two-Part System:

1. **Matching Rules** - Define HOW to identify duplicates

2. **Duplicate Rules** - Define WHAT ACTION to take

Matching Rules

Purpose: Define the criteria for identifying potential duplicates

Matching Methods:

- **Exact Match:** Field values must be identical

- **Fuzzy Match:** Allows for slight variations (typos, abbreviations)

Fuzzy Matching Examples:

- "John" matches "Jon"

- "123 Main Street" matches "123 Main St"

- "IBM" matches "I.B.M."

- "555-1234" matches "(555) 1234"

Standard Matching Rules:

- **Pre-built** for Accounts, Contacts, Leads

- Winter '15+ orgs: Must activate manually

- Newer orgs: Active by default

Custom Matching Rules:

- Create your own matching criteria

- Choose fields to compare

- Select exact or fuzzy matching per field

- Up to **5 active matching rules per object**

Creating Matching Rules:

1. Setup → Matching Rules → New Rule

2. Select object (Account, Contact, Lead, Custom Object)

3. Add matching criteria (fields + matching method)

4. Save and activate

Exam Tip: Matching rules IDENTIFY duplicates; duplicate rules CONTROL actions

Duplicate Rules

Purpose: Define what happens when duplicate is detected

Actions:

- **Allow:** User can create duplicate (with warning)

- **Block:** User CANNOT create duplicate

When Rules Run:

- On **Create** (new records)

- On **Edit** (updating existing records)

Components:

1. **Matching Rule(s):** Which matching rules to use (up to 3 per duplicate rule)

2. **Actions:** Allow or Block

3. **Alert Message:** Custom message shown to user

4. **Conditions:** When rule should run (optional)

Record-Level Security:

- **Enforce sharing rules:** Compare only records user can see

- **Bypass sharing rules:** Compare ALL records (recommended for thorough duplicate detection)

Standard Duplicate Rules:

- Pre-built for Accounts, Contacts, Leads

- Must activate manually

Creating Duplicate Rules:

1. Setup → Duplicate Rules → New Rule

2. Select object

3. Name and describe rule

4. Choose action (Allow or Block)

5. Select matching rule(s)

6. Configure conditions (optional)

7. Save and activate

Exam Scenarios:

- "Prevent users from creating duplicate contacts with same email"

- Answer: Matching Rule (Email, Exact) + Duplicate Rule (Block on Create)

- "Warn users about potential duplicate accounts with similar names"

- Answer: Matching Rule (Account Name, Fuzzy) + Duplicate Rule (Allow on Create with alert)

Duplicate Jobs

Purpose: Find existing duplicates in your database

Availability: Performance and Unlimited Editions only

How It Works:

1. Select object (Accounts, Contacts, Leads)

2. Choose matching rule

3. Salesforce scans up to **50 million records**

4. Creates Duplicate Record Sets

Result: List of potential duplicate records grouped together

Use Case: Clean up existing data after implementing duplicate rules

Limitations:

- Cannot merge automatically (manual merge required)

- Maximum 3 records can be merged at once

- Cannot cross objects (cannot detect Lead duplicate of Contact)

Exam Tip: Duplicate Jobs find OLD duplicates; Duplicate Rules prevent NEW duplicates

■ REPORTS

Report Formats - CRITICAL EXAM TOPIC

Four Main Formats:

1. Tabular Report

What It Is: Simple list (like a spreadsheet)

Characteristics:

- Rows = Records

- Columns = Fields

- **NO grouping**

- **NO subtotals**

- Grand total only (record count)

When to Use:

- Mailing lists

- Contact lists

- Export data

- Simple lists

Dashboard Compatibility:

- **Cannot be used in dashboards** UNLESS row limit applied

- **Cannot have report charts**

Exam Key Point: Simplest format, no grouping, limited dashboard use

2. Summary Report

What It Is: Grouped data with subtotals

Characteristics:

- **Groups rows** (vertical grouping)

- Displays subtotals

- Up to **3 grouping levels**

- Can have report charts

- **Most common report format**

When to Use:

- Group by category (sales by region, cases by priority)
- Need subtotals
- Dashboard components
- Charts and graphs

Grouping Example:

- Group 1: Account Type
- Group 2: Account Rating (within each type)
- Group 3: Industry (within each rating)

Dashboard Compatibility: ■ Yes (full compatibility)

Exam Tip: Summary reports are the "workhorse" - most versatile format

3. Matrix Report

What It Is: Grid with row AND column grouping

Characteristics:

- **Groups rows** (vertical grouping)
- **Groups columns** (horizontal grouping)
- Most complex format
- Up to **2 row groupings** and **2 column groupings**
- Great for cross-tabulation

When to Use:

- Compare data across two dimensions
- Revenue by month and product
- Cases by priority and status
- Data grids and pivot tables

Grouping Example:

- **Rows:** Close Month (January, February, March)

- **Columns:** Opportunity Type (New Business, Existing Customer, Renewal)

- **Result:** Grid showing revenue for each month-type combination

Detail Rows:

- Can toggle detail rows on/off

- Best viewed with **details hidden** (just show grid)

- If > 2,000 records, detail rows cannot be shown

Dashboard Compatibility: ■ Yes (full compatibility)

Exam Tip: Matrix = rows AND columns grouping

4. Joined Report

What It Is: Multiple reports combined into one

Characteristics:

- Up to **5 blocks** (sub-reports)

- Each block = separate report type

- Blocks must share at least **one common object**

- Each block can have own filters, sorting, grouping

- Each block returns up to **2,000 records** (total: 10,000)

When to Use:

- Compare different data sets

- Multi-perspective analysis

- Cross-object comparison

Common Use Cases:

- **Block 1:** Opportunities created this month

- **Block 2:** Leads created this month

- **Common field:** Owner

Availability: Enterprise Edition and above (NOT in Professional)

Limitations:

- NOT available in Lightning Experience (Classic only for creation)

- Slower performance (multiple report types)

- More complex to build

Dashboard Compatibility: ■ Yes

Exam Tip: Joined reports combine multiple report TYPES (not just different views)

Custom Report Types

Purpose: Define which objects and fields are available in reports

Standard Report Types:

- Pre-built (Accounts, Contacts, Opportunities, Cases, etc.)

- Cover most common scenarios

When to Create Custom Report Type:

- Need fields from objects not in standard types

- Need specific object relationships (parent-child-grandchild)

- Want to limit field selection for users

- Complex reporting requirements

Components:

- **Primary Object:** Starting point (always required)

- **Related Objects:** Connected via relationships (up to 4 levels deep)

- **Field Selection:** Choose which fields are available

- **Layout:** Organize fields into sections

Relationship Types:

- **"A" records may or may not have related "B" records** (Outer join - shows A even if no B)

- **"A" records must have related "B" records** (Inner join - only shows A with B)

Creating Custom Report Type:

1. Setup → Report Types → New Custom Report Type

2. Select primary object

3. Name and describe

4. Add related objects (if needed)

5. Select fields to include

6. Organize fields in layout

7. Set categories

8. Deploy to profiles

Exam Scenarios:

- "Need report showing Accounts with Opportunities AND related Contacts"

- Answer: Create custom report type with Account (primary), Opportunity (related), Contact (related)

- "Report showing Cases that DON'T have related solutions"

- Answer: Custom report type: Cases may or may not have Solutions

Bucket Fields

Purpose: Categorize data on-the-fly WITHOUT creating custom fields

Key Characteristics:

- Created IN the report (not on object)

- Only exists in THAT specific report

- **Does NOT create custom field** on object

- Quick categorization

- Up to **5 bucket fields per report**

- Each bucket can have **up to 20 values**

Supported Field Types:

- **Number** (ranges)

- **Picklist** (group picklist values)

- **Text** (categorize text values)

Common Use Cases:

- **Opportunity Amount buckets:** Small (< $10K), Medium ($10K-$50K), Large (> $50K)

- **Age ranges:** Under 30, 30-50, Over 50

- **Priority groupings:** High Priority (P1, P2), Low Priority (P3, P4)

Creating Bucket Field:

1. In Report Builder, click field → Bucket This Field

2. Name the bucket field

3. Create buckets (categories)

4. Define ranges or select values for each bucket

5. Save

Usage:

- Group reports by bucket field

- Filter by bucket field

- Use in charts

- **CAN reference in summary formulas**

Exam Tips:

- Buckets DON'T affect database (report-only)

- Can bucket on NUMBER, PICKLIST, TEXT fields

- **CANNOT bucket** on formula fields or summarized fields

- Maximum 5 bucket fields per report, 20 buckets each

Conditional Formatting

Purpose: Visually highlight data based on conditions

Availability:

- **Lightning Experience:** Summary, Matrix, Joined reports

- **Classic:** Dashboard components only (not in reports themselves)

How It Works:

- Set thresholds/ranges

- Apply color coding

- Highlight important data

Common Use Cases:

- Red for overdue tasks

- Green for high-performing reps

- Yellow for at-risk opportunities

Exam Tip: Conditional formatting is now available in Lightning reports (as of Summer 19)

Report Formulas

Three Types:

1. Row-Level Formulas

Purpose: Calculate value for EACH record

Key Points:

- **Only ONE row-level formula** per report

- References **maximum 5 fields**

- Calculated for each row

- Cannot reference bucket fields

- Cannot be used for grouping or filtering

Common Use Cases:

- Days between two dates

- Percentage calculations per record

- IF/THEN logic per record

Example:

IF(Billing_State__c = Shipping_State__c, "Match", "No Match")

Creating:

1. Report Builder → Columns → Add Row-Level Formula

2. Write formula

3. Name column

4. Save

2. Summary Formulas (Custom Summary Formulas)

Purpose: Calculate on grouped/aggregated data

Key Points:

- Available in Summary, Matrix, Joined reports (NOT Tabular)

- Calculate on summarized data (subtotals, grand totals)

- Up to **5 summary formulas per report**

- Uses special functions: **PARENTGROUPVAL**, **PREVGROUPVAL**

Return Types: Number, Currency, Percent only

Common Use Cases:

- Win rate: `WON:SUM / CLOSED:SUM`

- Average deal size: `AMOUNT:SUM / RowCount`

- Percentage of total: `AMOUNT:SUM / PARENTGROUPVAL(AMOUNT:SUM, GRAND_SUMMARY)`

Special Functions:

- **PARENTGROUPVAL:** Reference parent grouping level

- **PREVGROUPVAL:** Reference previous group value (for comparisons)

Limitations:

- **Cannot reference:**

- Another summary formula

- Row-level formulas

- **Cannot:**

- Group by summary formula

- Filter by summary formula

- Reorder summary formula columns

Example:

(AMOUNT:SUM - PREVGROUPVAL(AMOUNT:SUM, CLOSE_MONTH)) / PREVGROUPVAL(AMOUNT:SUM, CLOSE_MONTH)

(Growth rate from previous month)

3. Bucket-Level Formulas

Purpose: Calculate using bucket field values

Key Points:

- Reference bucket fields in formulas

- Requires API name of bucket field

- Used in summary formulas

Example: Calculate percentage of opportunities in "Large" bucket

Report Limitations

Record Limits:

- **Tabular reports:** Display first 2,000 rows (can export more)

- **Summary/Matrix:** Display first 2,000 rows PER grouping

- **Joined reports:** 2,000 rows per block (up to 5 blocks = 10,000 total)

- **Matrix with > 2,000 records:** Cannot show detail rows

Component Limits:

- **5 bucket fields** per report

- **5 summary formulas** per report

- **1 row-level formula** per report

- **3 grouping levels** for Summary

- **2 row + 2 column groupings** for Matrix

- **5 blocks** for Joined reports

Dashboard Limits:

- **Component groupings:** Max 1,000 groupings processed

- **Table rows:** Downloaded images capped at ~100 rows (3,000 pixels)

- **Images:** Max 20 images per component

Other Limits:

- **Report runtime:** 10 minutes maximum

- **Subscriptions:** Max 5 subscriptions per user per report

- **Cross-filter limit:** 3 cross-filters per report

Exam Tip: Know the 2,000 record limit and 5-formula limits

Report Subscriptions

Purpose: Automatically send report results via email

How It Works:

1. Schedule report to run

2. Choose frequency (daily, weekly, monthly)

3. Select recipients

4. Report runs automatically and emails results

Limitations:

- **Cannot attach report via workflow** (common wrong answer!)

- Maximum **5 subscriptions per user per report**

- Report must be in accessible folder

- Recipients must have report access

Exam Scenario:

- "Automatically send weekly sales report to team"

- Answer: Report subscription

- **WRONG Answer:** Workflow rule with email alert (workflows cannot attach reports)

■ DASHBOARDS

What Are Dashboards?

Definition: Visual display of report data using charts, graphs, tables, and metrics

Key Points:

- Built from **source reports**

- Each component = one source report

- Can use same/different reports per component

- Stored in folders (like reports)

- Up to **20 components per dashboard**

Dashboard vs. Report:

- **Dashboard:** Visual snapshot, multiple components, at-a-glance

- **Report:** Detailed data, export, drill-down

Dashboard Components

Available Component Types:

1. **Chart Components:**

- Horizontal Bar Chart

- Vertical Bar/Column Chart

- Stacked Bar Chart

- Line Chart

- Pie Chart

- Donut Chart

- Funnel Chart

- Scatter Chart

2. **Gauge:** Progress toward goal (like speedometer)

3. **Metric:** Single number with optional comparison

4. **Table:** Data in rows/columns

5. **Visualforce Page:** Custom component (Classic only)

6. **Lightning Component:** Custom component (Lightning)

7. **Rich Text:** Instructions, headers, context

8. **Image:** Logo, branding

Source Reports:

- **Summary and Matrix reports:** ■ Can be used for ALL components

- **Tabular reports:** ■ Cannot be used (UNLESS row limit applied)

Exam Tip: Tabular reports generally cannot be dashboard sources

Dashboard Filters

Purpose: Allow users to dynamically filter dashboard data

How It Works:

- Add filter to dashboard

- Users select values from dropdown

- ALL components using that field are filtered

Limitations:

- Up to **3 filters per dashboard**

- All components must use same field

- Only affects components that include the filter field

Types:

- List filter (picklist)

- Date filter (date range)

Exam Tip: Dashboard filters are interactive; report filters are static

Dashboard Refresh

When Dashboards Refresh:

- **Manual:** Click Refresh button

- **Scheduled:** Set refresh frequency

- **On view:** NOT automatic (common misconception)

Refresh Frequency Options:

- Daily at specific time

- Weekly on specific day

- Monthly on specific day

- Hourly (Lightning only)

Refresh Limitations:

- **One refresh per minute** per user (prevents overload)

- Refreshing queues multiple processes (slow for complex dashboards)

Email Notifications:

- Dashboards CAN be emailed on schedule

- **Filters are NOT applied to emailed dashboards** (shows unfiltered data)

Best Practices:

- Refresh sparingly

- Remove unnecessary components

- Combine multiple components where possible

- Split large dashboards into two

Exam Scenario:

- "Dashboard shows data from 2 hours ago"

- Answer: Dashboards don't auto-refresh on view; must manually refresh or schedule

Running User - CRITICAL EXAM TOPIC

Definition: The user whose security settings determine dashboard data

Three Options:

1. Run as Specified User (Static Dashboard)

How It Works:

- Dashboard runs using ONE person's security settings

- ALL users see the SAME data

- **Default behavior**

When to Use:

- Executive wants everyone to see full data

- Standardized view for all users

- Specific person's perspective needed

Example: CEO wants everyone to see company-wide sales (uses CEO's access)

Limitation: Everyone sees same data regardless of their own access

2. Run as Logged-In User (Dynamic Dashboard)

How It Works:

- Dashboard runs using EACH viewer's security settings

- Users see data based on THEIR access

- **One dashboard, personalized data**

When to Use:

- Show users ONLY their data

- Personalized views without creating separate dashboards

- Respect sharing rules and security

Example: Sales reps see their own opportunities; managers see their team's opportunities

Benefits:

- Single dashboard for all users

- Automatic personalization

- Respects security and sharing

Limitations:

- Counts toward **dynamic dashboard limit** (5 in Enterprise, 10 in Performance/Unlimited)

- **Cannot be stored in personal folder** (must be shared folder)

- Additional licenses can be purchased

Exam Key Point: Dynamic dashboards save time by eliminating need for multiple separate dashboards

3. Let Dashboard Viewers Choose

How It Works:

- Users can select whose perspective to view

- Dropdown allows switching between users

- Flexibility for different perspectives

When to Use:

- Users need to compare different perspectives

- Managers want to see individual rep views

- Training/coaching scenarios

Running User Drill-Down Behavior

Critical Distinction:

- **Dashboard data:** Based on running user's access

- **Drill-down report data:** Based on VIEWER's access

Example:

- Dashboard runs as CEO (shows all data)

- User clicks component to drill down

- Drill-down report shows ONLY data user can access

- **Data might not match!**

Exam Scenario:

- "User sees 100 opportunities in dashboard but only 20 in drill-down report"

- Answer: Dashboard runs as specified user (broader access), drill-down uses viewer's access (restricted)

Dynamic Dashboards - Deep Dive

Identification:

- Look for "Running User: The dashboard viewer" in settings

- Use SOQL query: `SELECT Id, Title, Type FROM Dashboard WHERE Type != 'SpecifiedUser'`

Limits by Edition:

- **Enterprise:** 5 dynamic dashboards

- **Performance:** 10 dynamic dashboards

- **Unlimited:** 10 dynamic dashboards

- **Developer:** 5 dynamic dashboards

Setup:

1. Create dashboard in SHARED folder (not personal)

2. Edit dashboard properties

3. Set "View Dashboard As" → "The dashboard viewer"

4. Save

Exam Tips:

- Dynamic dashboards MUST be in shared folders
- Count toward edition limit even if in Recycle Bin
- Can purchase additional dynamic dashboard capacity
- Old dynamic dashboards in personal folders still count toward limit

■ EXAM STRATEGY & KEY CONCEPTS

Critical Distinctions

1. Data Import Wizard vs. Data Loader

- **Wizard:** < 50K, web-based, limited objects, no delete/export
- **Loader:** 5M, desktop, all objects, all operations, automation

2. Matching Rules vs. Duplicate Rules

- **Matching Rules:** HOW to identify duplicates (exact/fuzzy)
- **Duplicate Rules:** WHAT ACTION to take (allow/block)

3. Report Formats

- **Tabular:** Simple list, no grouping, no dashboards
- **Summary:** Row grouping, subtotals, dashboard-ready
- **Matrix:** Row + column grouping, grid format
- **Joined:** Multiple report types, up to 5 blocks

4. Row-Level vs. Summary Formulas

- **Row-Level:** Calculates for EACH record, 1 per report, max 5 fields
- **Summary:** Calculates on GROUPS, up to 5 per report, aggregated data

5. Running User Options

- **Specified User:** Everyone sees same data
- **Logged-In User:** Each sees their data (dynamic)
- **Let Viewers Choose:** Users select perspective

6. Bucket Fields vs. Custom Fields

- **Bucket:** Report-only, no database impact, quick categorization

- **Custom Field:** Object-level, permanent, accessible everywhere

Common Exam Scenarios

Scenario 1: "Import 75,000 account records"

- **Answer:** Data Loader (exceeds 50K limit)

Scenario 2: "Import 5,000 leads with duplicate checking"

- **Answer:** Data Import Wizard (< 50K, has duplicate checking)

Scenario 3: "Export all opportunity data"

- **Answer:** Data Loader (Wizard cannot export)

Scenario 4: "Schedule weekly data backup"

- **Answer:** Data Export (only tool with scheduled backup)

Scenario 5: "Delete 10,000 old records"

- **Answer:** Data Loader (Wizard cannot delete)

Scenario 6: "Prevent duplicate contacts with same email"

- **Answer:** Matching Rule (Email, Exact) + Duplicate Rule (Block)

Scenario 7: "Report showing opportunities grouped by stage with revenue per stage"

- **Answer:** Summary Report (row grouping + subtotals)

Scenario 8: "Report showing revenue by month (rows) and region (columns)"

- **Answer:** Matrix Report (row + column grouping)

Scenario 9: "Compare opportunities created vs. closed this quarter"

- **Answer:** Joined Report (2 blocks, common object: Opportunity)

Scenario 10: "Dashboard showing each rep only their own opportunities"

- **Answer:** Dynamic Dashboard (run as logged-in user)

Scenario 11: "Calculate win rate in report"

- **Answer:** Summary Formula: `WON:SUM / CLOSED:SUM`

Scenario 12: "Categorize opportunities as Small, Medium, Large without custom field"

- **Answer:** Bucket Field on Amount

Scenario 13: "Automatically email weekly report to sales team"

- **Answer:** Report Subscription

Scenario 14: "Prevent saving opportunities with missing field based on stage"

- **Answer:** Validation Rule

Scenario 15: "User sees all data in dashboard but limited data in drill-down"

- **Answer:** Dashboard runs as specified user, drill-down uses viewer's access

Quick Reference: Tool Selection

Use Data Import Wizard When:

- < 50,000 records

- Simple objects (Accounts, Contacts, Leads)

- One-time manual import

- Want duplicate checking

- No API access

Use Data Loader When:

- > 50,000 records

- Any object (especially Opportunities, Cases)

- Delete/Export operations

- Automation/scheduling needed

- Complex migrations

Use Data Export When:

- Need scheduled automated backup

- Backup all org data
- Compliance/disaster recovery

Use Validation Rule When:

- Enforce data quality before save
- Business logic requirements
- Field dependencies

Use Matching Rule + Duplicate Rule When:

- Prevent/detect duplicate records
- Real-time duplicate checking
- Configurable duplicate actions

Use Tabular Report When:

- Simple lists (mailing lists, exports)
- No grouping needed
- Quick data view

Use Summary Report When:

- Need grouping and subtotals
- Dashboard components
- Most common scenarios

Use Matrix Report When:

- Need row + column grouping
- Grid/pivot table format
- Complex cross-tabulation

Use Joined Report When:

- Compare different report types
- Multiple perspectives
- Cross-object comparison

Use Bucket Field When:

- Quick categorization needed

- Don't want permanent custom field

- Report-specific grouping

Use Row-Level Formula When:

- Calculate per record

- Compare fields within record

- Simple per-row logic

Use Summary Formula When:

- Calculate on groups/aggregates

- Win rates, percentages, ratios

- Compare grouping levels

Report & Dashboard Limits Cheat Sheet

Reports:

- 2,000 rows displayed (Tabular, per grouping in Summary/Matrix)

- 10,000 total for Joined (2,000 per block × 5 blocks)

- 5 bucket fields per report

- 5 summary formulas per report

- 1 row-level formula per report

- 3 grouping levels (Summary)

- 2 row + 2 column groups (Matrix)

- 5 blocks (Joined)

- 10 minutes max runtime

Dashboards:

- 20 components per dashboard

- 3 filters per dashboard

- 1,000 groupings processed per component

- 1 refresh per minute per user

- 5 dynamic dashboards (Enterprise), 10 (Performance/Unlimited)

Data Operations:

- 50,000 records (Data Import Wizard)

- 5,000,000 records (Data Loader)

- 50,000,000 records (Duplicate Jobs)

■ Summary Checklist

Before the exam, make sure you can answer:

Data Management

- [ ] What's max records for Data Import Wizard? (50,000)

- [ ] Which tool can delete records? (Data Loader only)

- [ ] Which tool can export data? (Data Loader + Data Export)

- [ ] Can Data Import Wizard import Opportunities? (No)

- [ ] How to schedule automated back