Administrator Certification Prep: Configuration, Setup and Objects

Unit 1: Get Started with Administrator Certification Prep

Learning Objectives

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

- Describe the key topic areas of the Salesforce Administrator Certification.
- Access resources to prepare yourself for the Salesforce Administrator Certification.

The Salesforce Administrator Certification

The Salesforce Administrator credential is designed for individuals who have administrator experience with Salesforce and who are continually looking for ways to assist their companies in getting even more from existing and new features and capabilities.

This exam covers these key topics, each making up a certain percentage of the exam.

- Configuration and setup 20%
- Object Manager and Lightning App Builder 20%
- Sales and marketing applications 12%
- Service and support applications 11%
- Productivity and collaboration 7%
- Data and analytics management 14%
- Workflow/process automation 16%

By successfully passing the Salesforce Administrator exam, you demonstrate a thorough knowledge and understanding of the Salesforce platform across Sales, Service, and Collaboration clouds.

Preparing for the Exam

Preparing for the Salesforce Administrator exam takes time! This module takes you through preparing for part of the exam. There are three additional modules to help you continue your journey toward certification.

- Administrator Certification Prep: Applications and Activities
- Administrator Certification Prep: Data and Automation

All three modules contain real-world scenarios, interactive flashcards, links to resources, and key topic areas to study.

Don't forget to join the Trailblazer Community, where you can ask questions, collaborate, and join groups to help you prepare for your 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: Configuration, Setup and Objects guide.

Exam Logistics and Policies

Curious about the logistics of the exam? Here are some quick facts for you.

Recommended Experience	6 months hands-on experience as an administrator
Number of Questions	60
Passing Score	65% or 39 of 60
Results	Received immediately
Cost	$200
Location	Online or at a facility in your area
Restrictions	No hard-copy or online materials can be referenced during the exam

The quality of our certification exams and the value our credentials provide is our highest priority. Protecting the security and confidentiality of our exams is essential to providing our customers with credentials that are respected and industry-leading.

As a participant of the Salesforce Certification program, you're required to accept the terms of the Salesforce Certification Program Agreement. Click here to take a look at some important reminders about the certification exam.

Maintain Your Certification

Once you take and pass your exam (woohoo!), how do you maintain your certification?

To maintain Salesforce Certification credentials, all certified professionals must successfully complete release maintenance exams specific to their credential. So, you need to complete the Administrator Certification Maintenance module that's provided for each release. There are three releases each year for the Administrator Certification (Spring, Summer, Winter). If you don't complete your maintenance requirements by the completion due date, your credentials expire.

Note: If you'd like more information about certification maintenance, visit the Maintaining Your Salesforce Credential page.

Prepping for the Exam

This module is focused on these key topics, with each topic covered in its own unit.

- Configuration and setup 20%
- Object Manager and Lightning App Builder 20%

In each of the units, you learn the key areas to study for these three sections of the exam, including working through common scenarios.

Up first, dive into the exam section on organizational setup. Let's go!

Unit 2: Study Up on Configuration and Setup

Learning Objectives

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

- Describe the options found in the company settings.
- Distinguish and understand the administration of the declarative configuration of the user interface.
- Demonstrate the proper setup and maintenance of users.
- Explain the various organization security controls.
- Apply the appropriate security controls based on features and capabilities of the Salesforce sharing model.
- Determine the appropriate use of a custom profile or permission set using the various profile settings and permissions.

Key Topics

This unit prepares you for the organizational setup section of the Salesforce Administrator exam, which makes up 20% of the overall exam. This section of the exam tests these topics.

- UI features
- Company information
- Locale settings

- Search results
- List views
- Currency management
- Fiscal year
- Default settings
- Homepage layouts
- User management
- Security settings
- Sharing settings

This unit provides a number of interactive, real-world, scenario-based questions that are a lot like the ones you can encounter as a Salesforce administrator. Looking at these scenarios helps prepare you to take the org setup 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 org setup section of the exam.

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

Solar components and systems supplier, Ursa Major Solar wants to ensure that the information is up to date on their Company Information page in Salesforce.

Which set of information can an administrator specify in the Company Information page?

A	BUSINESS HOURS, TRANSLATION SETTINGS, CORPORATE CURRENCY	Incorrect. Though corporate currency is found on the Company Information page, Business Hours is found under Company Settings in its own category, and Translation Settings is found under the User Interface > Translation Workbench section.
B	ORGANIZATION NAME, DEFAULT TIME ZONE, DEFAULT LANGUAGE	Correct. The Organization Name, Default Time Zone, and Default Language are all found on the Company Information page.
C	PRIMARY CONTACT, CHATTER SETTINGS, SET DOMAINS	Incorrect. Primary Contact is found on the Contact Information page. However, Chatter Settings is found under the Chatter section, and you would create a custom domain under the Company Settings > My Domain section. You can find any domains that are already active under the User Interface > Domains section.
D	FISCAL YEAR, PASSWORD POLICIES, DEFAULT TIME ZONE	Incorrect. Though Default Time Zone is found on the Company Information page, Fiscal Year is found under the Company Settings section in its own category, and Password Policies is found under the Security section.

Scenario 2

Ursa Major Solar wants to ensure that all of its locale settings are up to date and consistent in the Salesforce system. The administrator is going through the process of making updates and configuring parameters for this information.

Which two sets of parameters are configured using Locale settings? (Choose two answers.)

A	BUSINESS HOURS AND HOLIDAYS	Incorrect. A locale is determined by language, and can be made up of many countries and business locations. Business hours should be set by individual locations and vary based on country, time zone, and so on. Holidays vary based on location as well.
B	TIME AND NUMBER DISPLAY FORMAT	Correct. Time and Number Display Format is universal within each locale.
C	FIRST/LAST NAME AND DATE FORMAT	Correct. First/Last Name and Date format are universal within each locale.
D	PHONE NUMBER AND CURRENCY FORMAT	Incorrect. Phone Number format and Currency Format vary based on the locale. There are varying currencies among different countries that fall within the same locale, and the same applies to phone numbers.

Scenario 3

The VP of sales has changed the naming convention for opportunities to make it more uniform across the company. The sales manager wants to update multiple opportunity names for his sales team in Europe using his “Team Europe” list view in Salesforce.

Which user interface settings should be used to allow users, with all required profile permissions, to edit records in List Views? (Choose two answers.)

A	ENABLE INLINE EDITING	Correct. Enable Inline Editing allows mass editing of a record’s fields straight from a list view. Note that this can be done on team list views that are predefined to contain only one record type.
B	ENABLE ENHANCED LISTS	Correct. Enable Enhanced Lists gives you the ability to quickly view, customize, and edit list data to speed up your daily productivity.
C	ENABLE ENHANCED PAGE LAYOUT EDITOR	Incorrect. Enable Enhanced Page Layout Editor allows you to customize page layouts, not list views.
D	ENABLE ENHANCED PROFILE LIST VIEWS	Incorrect. Enable Enhanced Profile List Views pertains to mass editing profiles, and permissions within those profiles. It’s a form of a filtering tool to access specific profile information and apply a blanket edit to all profile information that applies to that filter.

Scenario 4

A new hire at Ursa Major Solar has joined the customer service team to interact with customers and handle cases. This user needs access to the Service Console to manage the cases and customer information.

What should an administrator do to assign a Service Cloud user license to a new user?

A	ENABLE SERVICE CLOUD USER ON THE USER RECORD DETAIL PAGE.	Correct. Feature licenses such as Service Cloud User or Marketing Cloud User can be found on the user profile page. These licenses enable features in addition to the User Licenses, such as the Salesforce User License.
B	CLONE THE SAMPLE CONSOLE AND ASSIGN IT TO THE USER.	Incorrect. Assigning the Sample Console or clone of it does not assign a user to the Service Cloud User license. They would need to have the Service Cloud User feature license to even access the console.
C	CREATE A NEW PERMISSION SET LICENSE AGREEMENT.	Incorrect. You would not create a feature license through a permission set. A feature license is assigned to the company with the purchase of a product - such as the Service Cloud User license for the Service Cloud product. A permission set is a collection of settings and permissions that give users access to various tools and functions.
D	ENABLE SERVICE CONSOLE IN SUPPORT SETTINGS.	Incorrect. The Service Console should already be enabled, you just need to make sure the user is assigned the Service Cloud User license to access it.

Scenario 5

Ursa Major Solar, a medium-sized, Southwest-based supplier of solar components and systems, is growing internationally. An administrator receives details of a new hire in the Tokyo office, who requires access to the Salesforce organization. Which two requirements should the administrator consider when creating a new user in a production Salesforce org?

A	USERNAMES MUST BE UNIQUE ACROSS ALL PRODUCTION SALESFORCE ORGS.	Correct. All usernames must be unique across all production orgs. If a company has a standard email domain (which is used as a username), an administrator needs to add an additional identifier in the email to make it unique.
B	USERNAMES MUST BE IN THE FORM OF AN EMAIL ADDRESS.	Correct. All usernames must be in the form of an email address but do **NOT** need to be an actual email.
C	USERNAMES MUST BE THE SAME AS THE USER'S EMAIL ADDRESS.	Incorrect. A username can be different from the user's email address, but the username must be in the form of an email.
D	USERNAMES MUST INCLUDE THE COMPANY'S EMAIL DOMAIN.	Incorrect. Usernames can include any email domain, as long as it is in the form of an email.

Scenario 6

A new employee is trying to login to Salesforce, but is having trouble. He reaches out to ~~you~~ the Salesforce Admin for help.

What should the administrator do first to troubleshoot login error messages?

A	CHECK THE USER'S LOGIN HISTORY RELATED LIST ON THE USER RECORD.	Correct. First, the administrator will want to check the login history related list to get an understanding of what could be causing the login issue.
B	REVIEW ENTRIES IN THE SETUP AUDIT TRAIL.	Incorrect. The entries in the Setup Audit Trail track changes that an Admin has made in Salesforce, not the user.
C	LOG IN AS THE USER TO VIEW THE ERROR MESSAGE.	Incorrect. Logging in as the user would not show the login error message.
D	SEARCH THE DEBUG LOG FOR THE ERROR MESSAGE.	Incorrect. A debug login would not capture the login issue.

Scenario 7

The administrator is notified that one of Ursa Major Solar's employees is going on leave for a few weeks. Ursa Major Solar does not want the employee logging in to Salesforce while on leave.

What should the administrator do to temporarily prevent a User from logging into Salesforce?

A	RESET THE USER'S PASSWORD.	Incorrect. The user would still be able to log in once they reset their password.
B	FREEZE THE USER'S ACCOUNT.	Correct. You would freeze the user's account. The license will still be in use, but the user will not be able to log in. When they return from leave, you can simply unfreeze the account.
C	CHANGE THE USER'S LOGIN HOURS.	Incorrect. The user would still be able to log in during the newly created login hours.
D	DELETE THE USER'S ACCOUNT.	Incorrect. Deleting the user's account will deactivate their license. This means it is not temporary. You are able to reactivate an account that is deactivated, but this is not the most efficient answer to the scenario.

Scenario 8

The administrator is asked to deactivate the Salesforce user account for an employee who has recently left the company.

When a user account is deactivated, what happens to the associated license?

A	THE LICENSE BECOMES AVAILABLE FOR REASSIGNMENT.	Correct. When a User License is deactivated, it is available to be reassigned to another employee in the company.
B	THE LICENSE IS DELETED.	Incorrect. The User License is available for reassignment; it is not deleted.
C	THE LICENSE IS REMOVED FROM THE BILLABLE LICENSES FOR THE ORGANIZATION.	Incorrect. The company has already paid for this license. It is not removed from the billable licenses.
D	THE LICENSE IS AUTOMATICALLY ASSIGNED TO ANOTHER USER.	Incorrect. The license does not get automatically assigned to another user. You, as the Admin, would need to reassign the license.

Scenario 9

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?

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, will not be required to verify their identity.
B	ALL ATTEMPTS TO LOG IN FROM OUTSIDE THE NETWORK ARE DENIED.	Incorrect. Users would still be 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 would still be 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.

Scenario 10

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?

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 as password expiration.

Scenario 11

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?

A	SET OPPORTUNITY ORG-WIDE DEFAULT SHARING SETTINGS TO PRIVATE.	Incorrect. Setting the Opportunity object to Private would make 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 Report folder name implies, this report folder is inherently only visible to you. Therefore, this does not meet the criteria of providing visibility to the Executive Team.

Scenario 12

A user's profile can be controlled by which three settings?

A	RECORD TYPE ASSIGNMENT	Correct. Profiles define how users access objects and data, and what they can do within the application.
B	SECURITY AT THE FIELD-LEVEL	Correct. Profiles define how users access objects and data, and what they can do within the application.
C	ASSIGNED APPS	Correct. Profiles define how users access objects and data, and what they can do within the application.
D	FEATURE LICENSE ASSIGNMENT	Incorrect. Feature license grants access to features that need to be added to a user license.
	LOCALE SETTINGS	Incorrect.

Exam Topic Flashcards

The following flashcards cover UI features, company information, security settings and sharing settings. 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.

Card 1

Salesforce users at Ursa Major Solar complain that global search returns too many records. Which two configurations should an administrator perform to help users manage search results?	• Specify the Search Filter Fields for the object's search layout. • Reduce the number of records displayed for each object in the Search Results page.

Card 2

List View	A list of records that meet specific filter criteria.

Card 3

What are two reasons a user cannot be deactivated?	• The user is the recipient of Workflow Email Alerts. • The user is a Customer Community Administrator.

Card 4

User License	A user license determines the baseline of features that the user can access. Every user must have exactly one user license. You assign user permissions for data access through a profile and optionally one or more permission sets.

Card 5

Permission Set	• A permission set is a collection of settings and permissions that give users access to various tools and functions. • The settings and permissions in permission sets are also found in profiles, but permission sets extend users' functional access without changing their profiles.

Card 6

Profile	• Defines how users access objects and data, and what they can do within the application. • When you create users, you assign a profile to each one.

Card 7

How can a System Administrator discover who added a field to the account page layout?	Use the Setup Audit Trail.

Card 8

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.

Card 9

Organization-Wide Sharing Defaults (OWD)	• Defines the default access level for an object's records with organization-wide sharing settings. • Can be set separately for custom objects and many standard objects, including

	assets, campaigns, cases, and accounts and their contracts.

Card 10

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.

Card 11

A System Administrator cannot share a report folder. What is a possible reason?	The folder is private.

Card 12

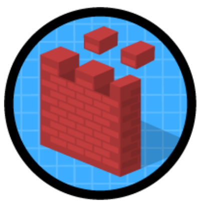
Sharing Rules	• Give particular users greater access by making automatic exceptions to your org-wide sharing settings. • Use to extend sharing access to users in public groups, roles, or territories.

Card 13

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.

Related Badges

Looking for more information? Explore these related badges.

Badge	Content Type
 Data Security	Module
 Prepare Your Salesforce Org for Users	Project
 Company-Wide Org Settings	Module
 Salesforce Platform Basics	Module
 User Authentication	Module

 User Management	Module
 Protect Your Data in Salesforce	Project
 Customize an Org to Support a New Business Unit	Project

Congratulations! You've studied up on configuration and setup. Next, let's take a look at Object Manager and Lightning App Builder.

Unit 3: Review Object Manager and Lightning App Builder

Learning Objectives

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

- Describe the standard object architecture and relationship model
- Explain how to create, edit, delete, and customize fields and page layouts on standard and custom objects and the implications of deleting fields.
- Determine how to create and assign page layouts, record types, and business processes for standard and custom objects.
- Practice common scenarios related to standard and custom objects.

Key Topics

This unit prepares you for the user setup section of the Salesforce Administrator exam, which makes up 20% of the overall exam. This section of the exam tests these topics.

- Object architecture
- Object relationships
- Creating, editing, and deleting fields
- Creating and assigning page layouts
- Creating and assigning record types
- Creating and assigning business processes
- Creating custom objects

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.

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Scenario 1

The VP of Sales at Ursa Major Solar wants to take a look at all of the sales deals that are currently in play for ~~his~~ the Sales team to determine how well they are tracking toward their goal for quarter end.

Which standard object stores information about sales deals?

A	ACCOUNTS	Incorrect. Accounts store information about customers or individuals you do business with. There are two types of accounts. Business accounts store information about companies. Person accounts store information about individual people.
B	ASSETS	Incorrect. Assets are the specific products that your customers have purchased. Assets have a serial number, purchase date, and other information related to an individual sale. Depending on how your organization uses assets, they can represent competitor products that your customers have or versions of your products.
C	PRODUCTS	Incorrect. Products are a base catalog of all the items and services you sell and their standard prices.
D	OPPORTUNITIES	Correct. Opportunities are sales deals in progress. Track progress by moving each opportunity through a series of business milestones called stages, like Prospecting, Proposal Sent, Negotiation, and Contract Signed. The goal is to “win” the opportunity, or move it to a final stage that represents a successful outcome for your business.

Scenario 2

A sales team member at Ursa Major Solar wants to view information related to one of their accounts to have a 360 degree view of the customer.

Which two standard objects are related to Account records? (Choose two answers.)

A	CASES	Correct. Cases is a standard object related to an Account.
B	CAMPAIGNS	Incorrect. Campaigns are not related to Accounts.
C	OPPORTUNITIES	Correct. Opportunities is a standard object related to an Account.
D	LEADS	Incorrect. Leads are not related to Accounts. They are converted into Accounts/Contacts.

Scenario 3

The marketing manager at Ursa Major Solar wants to run a marketing campaign for their upcoming event called the Ray-A-Thon. the manager wants to make sure to capture as much information as possible generated from the campaign in Salesforce.

Which three objects have a relationship with a Campaign? (Choose three answers.)

A	LEAD	Correct. You can find the Campaign related list on the Lead object. A Company's campaigns typically target prospective customers (leads). Associate contacts and leads with campaigns as campaign members.
B	CONTACT	Correct. A Company's campaigns typically target existing customers (contacts). Associate contacts and leads with campaigns as campaign members.
C	ACCOUNT	Incorrect. Accounts are not associated with Campaigns.
D	OPPORTUNITY	Correct. Opportunities are related to Campaigns, and can track which Opportunities were created as a result of various Campaigns .
	CONTACT ROLE	Incorrect. Contact Roles are not related to Campaigns.

Scenario 4

Ursa Major Solar needs a field that reflects Account size based on the standard field, number of employees. Which formula function should an administrator use to evaluate different results based on a specific condition with multiple outcomes?

A	ISPICKVAL	Incorrect. ISPICKVAL determines if the value of a picklist field is equal to a text literal you specify. It evaluates picklist values, and we are looking at the *number* of employees.
B	TEXT	Incorrect. TEXT converts a percent, number, date/time or currency type field into text anywhere formulas are used. This does not meet the requirements.
C	IF	Correct. IF determines if expressions are true or false. Returns a given value if true and another value if false. This is correct because you can string together multiple IFs to evaluate a specific condition with multiple outcomes.
D	AND	Incorrect. AND returns a TRUE response if all values are true, and returns a FALSE response if one or more values are false. This is incorrect because it joins together multiple conditions and our requirements are for a specific condition.

Scenario 5

The sales managers at Ursa Major Solar want Opportunities that have **NOT** been updated in the past 30 days to be flagged automatically . How should an administrator implement this requirement?

A	CREATE A FORMULA FIELD TO CALCULATE THE TIME SINCE LAST UPDATE AND DISPLAY AN IMAGE OF A RED FLAG IF IT MEETS THE DEFINED CRITERIA.	Correct. Adding a formula field to display a red flag if it has been at least 30 days since the last update would meet this requirement.

B	ADD A FORMULA TO THE DEFAULT VALUE OF THE LAST MODIFIED DATE FIELD TO TURN THE TEXT RED IF THE RECORD MEETS THE CRITERIA.	Incorrect. A formula can display an images for a color. Changing the color of text is not possible with declarative formulas.
C	ADD A FORMULA TO THE DEFAULT VALUE OF THE OPPORTUNITY NAME FIELD TO TURN THE BACKGROUND RED IF THE RECORD MEETS THE CRITERIA.	Incorrect. A formula can display an images for a color. Changing the color of text is not possible with declarative formulas.
D	CREATE A FORMULA FIELD TO SHOW THE LAST LOGIN DATE OF THE OWNER AND DISPLAY AN ALERT MESSAGE IF IT MEETS THE DEFINED CRITERIA.	Incorrect. Just because the Owner of the record has logged in recently, doesn't mean they have updated their opportunities.

Scenario 6

The Ursa Major Solar CEO does **NOT** want to see the list of Contacts when viewing an Account page, but still needs to access Contact records.

How should the administrator configure this?

A	REMOVE READ ACCESS PERMISSIONS FOR CONTACTS FROM THE CEO'S PROFILE.	Incorrect. This would remove all access to Contact records, and the CEO would still need access to Contact records, just not from the Account page.
B	SET THE CONTACT ORG-WIDE DEFAULT SHARING SETTINGS TO PRIVATE.	Incorrect. This would remove access to the Contact record for the whole organization.
C	CREATE AN ACCOUNT PAGE LAYOUT WITHOUT	Correct. Removing the Contacts Related list from the Account page layout would prevent the user from seeing Contacts on the Account page, but they would still have access to Contact records.

	THE CONTACTS RELATED LIST.	
D	REMOVE THE ACCOUNT RELATED LIST FROM THE CONTACT PAGE LAYOUT.	Incorrect. This would prevent the user from seeing the Account Related list on the Contact Record, not the Contact Related list on the Account Record.

Scenario 7

The VP of Sales at Universal Containers wants to ensure that there is a consistent, color-coded report to easily track picklist values from the Stage field on an Opportunity.

How should an administrator ensure that a picklist field's values display in consistent colors on all reports? (Choose two answers.)

A	USE A BUCKET FIELD THAT DEFINES THE COLOR FOR EACH VALUE.	Incorrect. Bucket fields colors are dynamically defined and do not default between reports.
B	CONFIGURE REPORT CONDITIONAL HIGHLIGHTING FOR EACH VALUE.	Incorrect. Conditional highlighting on reporting is for a range of values.
C	UPDATE THE PICKLIST FIELD AND SET THE COLOR FOR EACH VALUE.	Correct. Picklist values can be assigned fixed colors to all values.
D	CREATE A FORMULA FIELD THAT DEFINES THE COLOR FOR EACH VALUE.	Correct. Formula fields using the IMAGE function can be defined for each value in the picklist.

Scenario 8

Universal Containers wants to track Invoice Payments on an Opportunity Related List. Only the Finance Team should see this Related List; however, all Users should be able to view Invoice Payment reports.

How should the administrator implement this requirement?

A	CREATE A NEW PAGE LAYOUT AND PROFILE FOR THE FINANCE TEAM.	Correct. This solution would allow only the Finance Team to see the Page Layout with the Related list, and all users to view the Invoice Payment reports.
B	SET THE INVOICE PAYMENT ORG-WIDE SHARING SETTINGS TO PRIVATE.	Incorrect. This would prevent the Finance Team from seeing the information as well as all other users.
C	BUILD AN INVOICE PAYMENT REPORT WITH A RUNNING USER OF FINANCE.	Incorrect. This solution would only allow Users to view the reports. The Finance Team should see the Related List on the page layout.
D	GRANT FINANCE ACCESS ONLY TO THE INVOICE PAYMENT OBJECT.	Incorrect. This would not meet the requirements. The scenario states that all users would be able to view the Invoice Payments reports.

Scenario 9

The marketing team at Ursa Major Solar wants a chart added to the home page specific to their lead generation.

What should an administrator recommend to meet this requirement?

A	UPDATE THE MARKETING TEAM'S HOME PAGE IN THE APP LAUNCHER.	Incorrect. Home page updates are made in the Lightning App Builder.
B	UPDATE THE MARKETING TEAM'S HOME PAGE IN THE LIGHTNING APP BUILDER.	Correct. Home page updates can be made in the Lightning App Builder.
C	UPDATE THE ORG-WIDE HOME PAGE IN THE LIGHTNING APP BUILDER.	Incorrect. Updating the Org-wide home page updates the page for the entire org.
D	UPDATE THE MARKETING TEAM'S HOME PAGE WITH A HYPER LINK TO THE DASHBOARD.	Incorrect. Updating the home page with a link to the report would not populate the chart on the home page.

Scenario 10

The administrator updated the sales operation team's project record page with new fields and dynamic components. However, when they refreshed the page the changes are missing. What should the administrator troubleshoot to ensure the changes are implemented?

A	CONFIRM THE PAGE IS ACTIVATED IN THE LIGHTNING APP BUILDER.	Correct. The changes to the page will be unavailable until activated.
B	CREATE A PERMISSION SET TO GRANT ACCESS TO THE PROJECT OBJECT.	Incorrect. The sales operation team already has access to the page. Changes to the page need to be activated.
C	ADD THE PAGE TO THE APP LAUNCHER.	Incorrect. The page needs to be activated.
D	REVIEW THE COMPONENT VISIBILITY FILTERS.	Incorrect. The changes to the fields and components are missing. Changes to the page need to be activated.

Exam Topic Flashcards

The Object Manager and Lightning App Builder section of the exam covers user and license management, freezing and deactivation, and password management. 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.

Card 1

A delegated administrator at Ursa Major Solar cannot edit the Created Date field for the Account record.	This is a System Audit field and it is Read-Only for existing records without logging a case.

What reason should the administrator give for why this is occurring?	

Card 2

Ursa Major Solar wants to create a field to store credit card numbers and needs to make sure the information is protected. Which two actions allow the administrator to provide enhanced security for this field?	• Create an Encrypted Text field. • Update Field-Level Security settings.

Card 3

Ursa Major Solar has a renewals sales team that will use the Opportunity object. The team wants to use many of the same picklist fields that are already defined, but will need unique picklist values. Which feature allows an administrator to maintain the same field for two different teams?	Record types

Card 4

Ursa Major Solar has a sales team focused on renewals. The team will use many of the same Opportunity fields as other teams, but need different Stage values. What should the administrator update to support this requirement?	Stage Selected Values in the Sales Processes

Card 5

The customer support team wants to use a different Page Layout when closing a Case. Which method should the administrator use to fulfill this request?	Case Close Page Layout

Card 6

Formula Field	A read only field whose value is evaluated from the formula or expression defined by us. We can define formula field on both standard as well as custom objects. Any change in expression or formula will automatically update the value of formula field. We can define formula field for 8 types: • Number • Currency • Percent • Date • Date/Time • Checkbox • Text

Card 7

Custom Objects	Objects, having five standard fields, created by users to address their need.

Card 8

Roll-up Summary Field	• A custom object field that calculates values from related records or the records in a related list. • Created to display a value in a master record based on the values of fields in a detail record. • Roll-up summary can be defined on Master-Detail relationship only.

Card 9

Lookup Field	• Also a one-to-many relationship, but in this relationship, two objects has no effect on deletion or security. Child objects are independent. • Child objects have a separate setting. If you delete the parent object, the child object remains in the system. A child object may or may not have a parent.

Card 10

Master-detail	Closely links objects together such that the master record controls certain behaviors of the detail and subdetail record. (For example, you can define a two-object master-detail relationship, such as Account–Expense Report, that extends the relationship to subdetail records, such as Account–Expense Report–Expense Line Item. You can then perform operations across the master–detail–subdetail relationship.)

Card 11

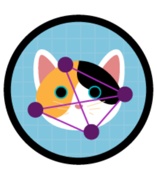
One-to-many	Relationship with many child objects but one Parent Object. (Example: Many metro cities are associated with one country.) This kind of relationship is represented in four different forms: ● Master-detail ● LookUp (Loosely Coupled Relationship) ● Self ● Hierarchical

Card 12

Lightning App Builder	A point-and-click tool that makes it easy to create custom pages for the Salesforce mobile app and Lightning Experience.

Related Badges

Looking for more information? Explore these related badges.

Badge	Content Type
 [Data Modeling]	Module
 Salesforce User Basics	Module
 Build a Battle Station App	Project
 Customize the User Interface for a Recruiting App	Project
 Build a Data Model for a Recruiting App	Project
 Build a Cat Rescue App That Recognizes Cat Breeds	Project

 Lightning Experience Customizations	Module
 Customize a Salesforce Object	Project

Congratulations. You've covered over 40% of the Administrator Certification test material in this badge. You are well on your way.

You've reviewed these sections.

- Configuration and setup
- Object Manager and Lightning App Builder

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