Administrator Certification Prep: Data and Automation

Unit 1: Practice Data and Analytics Management

Learning Objectives

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

- Describe the consideration when importing, updating, transferring, mass deleting, exporting and backing up data.
- Describe the capabilities and implication of data validation tools.
- Describe the options available when creating or customizing a report or report type.
- Describe the impact of sharing model on reports.
- Demonstrate the options available when creating and modifying dashboards.

Key Topics

This unit prepares you for the data and analytics management section of the Salesforce Administrator exam, which makes up 14% of the overall exam. This section of the exam tests these topics.

- Data types
- Validation rule
- Data Import Wizard
- Data Loader
- Recycle Bin
- Merge function
- Mass Transfer
- Mass Delete
- Duplicate Matching
- External ID
- Data Export
- Report creation
- Custom reports
- Editing and customizing reports
- Dashboard components
- Data sharing
- Report and dashboard filters

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 data and analytics management 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: Data and Automation.

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

A sales manager at Ursa Major Solar wants a team of sales reps to know how many open opportunities they have at any given time.

How should an administrator configure a report for each sales rep to see their own open opportunities?

A	CREATE A REPORTING SNAPSHOT GROUPED BY SALES REP.	Incorrect. This would not show a sales rep only their own open opportunities.
B	CREATE A REPORT WITH A CROSS FILTER BY MY OPPORTUNITIES.	Incorrect. Cross Filters are used in reports to filter for cross object fields.
C	CREATE A REPORT FILTERED BY MY OPPORTUNITIES.	Correct. This report would show a sales rep their own open opportunities.
D	CREATE A REPORT SCHEDULE FOR EACH SALES REP.	Incorrect. Incorrect. This doesn't meet the requirements for the scenario. A schedule wouldn't create a report that would allow each sales rep to see their own open opportunities.

Scenario 2

Which two of these report charts show how many leads are in the marketing pipeline based on lead status and what percent each lead status represents?

A	GROUPED BAR CHART	Incorrect. A grouped bar chart shows siloed, individual lead information.
B	PIE CHART	Correct. A pie chart shows the number of leads as well as the percentage of leads as part of the whole.
C	DONUT CHART	Correct. A donut chart shows the number of leads as well as the percentage of leads as part of the whole.
D	LINE CHART	Incorrect. A line chart does not show a percentage of leads relative to the whole.

TRAILHEAD

Scenario 3

A finance user with the View All Data permission enabled sees no opportunities when opening a sales pipeline report. However, a Sales Rep sees opportunities as expected. opportunities should be visible to only those with permission.

Which two actions should the administrator perform to resolve this problem?

A	SELECT SAVE HIERARCHY LEVEL ON THE PIPELINE REPORT.	Correct. The Save Hierarchy Level checkbox being selected will ensure that the hierarchy level that was used when creating a report will stay intact. That means, if the Finance User had permission to see reports originally, that will be the case when any subsequent report is created.
B	CREATE A NEW REPORT FORMULA ON THE PIPELINE REPORT.	Correct. Creating a formula will not change which opportunities are visible.
C	UPDATE THE REPORT FILTER TO SHOW ALL OPPORTUNITIES.	Correct. Using a filter to show All Opportunities would allow users with the View All Data permission enabled to see all of the opportunities on the report.
D	CHANGE THE OG-WIDE OPPORTUNITY SHARING DEFAULT TO PUBLIC READ.	Incorrect. This would allow everyone in the organization to see Opportunities.

Scenario 4

What should an administrator configure to provide each Sales Rep a dashboard that shows their current Opportunity pipeline?

A	SET A DASHBOARD FILTER TO THE CURRENT USER.	Incorrect. Setting the Dashboard filter to the current user would only show Opportunities for that user, not the user running the Dashboard.
B	CREATE A DASHBOARD FOLDER FOR EACH USER.	Incorrect. Creating a dashboard folder for each user would not filter the Dashboard for users. A Dashboard folder is for storing dashboards; limiting visibility to the dashboards in the folder.
C	FILTER THE DASHBOARD WITH A DYNAMIC VIEW SET TO THE VP OF SALES.	Incorrect. Dynamic dashboards are limited. The View Dashboard As options are Me, Another person or the dashboard viewer.
D	SET THE DASHBOARD RUNNING USER TO “THE DASHBOARD VIEWER.”	Correct. This will ensure the Dashboard shows only data relevant to the user viewing it.

Scenario 5

A sales user wants to add components to their dashboard. What is the maximum number of components that can be added to a single Dashboard?

A	3	Incorrect. Each dashboard can have up to 20 components. Each report can have up to 3 cross filters.
B	15	Incorrect. Each dashboard can have up to 20 components.
C	20	Correct. Each dashboard can have up to 20 components.
D	50	Incorrect. Each dashboard can have up to 20 components. A dashboard filter can have up to 50 values.

Scenario 6

What should the system administrator check when users are unable to find a Custom Report Type?

A	MAKE SURE THE NEW REPORT TYPE IS DEPLOYED.	Correct. Users will not be able to access a custom report type if it hasn't been deployed.
B	MAKE SURE THE USER PROFILE INCLUDES THE REPORT TYPE.	Incorrect. Access to objects is controlled by Profiles not based on report type.
C	ADD THE NEW REPORT TYPE TO THE RELATED OBJECTS.	Incorrect. Report Types are created for the object that is reported on.
D	ADD A BUTTON FOR THE NEW REPORT TYPE TO THE REPORT BUILDER.	Incorrect. Report Types are part of the Report Builder when deployed.

Scenario 7

Ursa Major Solar uses a private data access model. Product managers and sales representatives are in different branches of the role hierarchy. What should an administrator do to ensure that product managers can report on opportunities in their product line?

A	CREATE A SHARING RULE BASED ON CRITERIA.	Correct. Criteria-based sharing rules determine what records to share based on field values other than ownership.
B	SAVE ALL OPPORTUNITY REPORTS IN A PUBLIC FOLDER.	Incorrect. Saving reports in a public folder will give access to everyone.
C	MOVE ALL PRODUCT MANAGERS TO A ROLE BELOW THE SALES REPRESENTATIVES.	Incorrect. If product managers are in a role below sales representatives, they will not be able to see the reports. Product managers would have to be in a role above the sales representatives according to the role hierarchy.
D	CREATE A NEW ROLE FOR PRODUCT MANAGERS AND SALES REPRESENTATIVES.	Incorrect. Creating a new role would further separate the role hierarchy. The product managers and sales representatives would not need to be combined or branched off.

Scenario 8

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?

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 can not 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 works only on data already imported into the org. Since the goal is to prevent data duplication before being imported, the formula field is not an accurate solution.

Scenario 9

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

Which two profile permissions does the sales operation team need to be able to perform this task?

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.
D	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 Operation team.

Scenario 10

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?

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 therefore would not meet the requirements of the situation.
C	PAGE LAYOUT	Incorrect. While page layouts can determine which fields are required, they can not be setup to be conditional based on the stage.
D	RECORD TYPE	Incorrect. Record types allow 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.

Scenario 11

Ursa Major Solar is importing data and has many records that do not meet the data validation criteria. What will occur?

A	THE IMPORT PROCESS WILL REQUIRE USER AUTHORIZATION IN ORDER TO IMPORT THE INVALID RECORDS.	Incorrect. Salesforce runs validation rules on records before they are imported. Records that fail validation are not imported.
B	THE IMPORT PROCESS WILL FAIL, BUT ONLY FOR THE RECORDS WITH INVALID DATA.	Correct. Salesforce runs validation rules on records before they are imported. Records that fail validation are not imported.
C	THE IMPORT PROCESS WILL ABORT WHEN IT ENCOUNTERS THE FIRST INVALID RECORD.	Incorrect. Salesforce runs validation rules on records before they are imported. Records that fail validation are not imported.
D	THE IMPORT PROCESS WILL IGNORE THE DATA VALIDATION CRITERIA.	Incorrect. Salesforce runs validation rules on records before they are imported. Records that fail validation are not imported.

Scenario 12

Users at Ursa Major Solar are trying to create opportunities. When populating a custom picklist field, the users receive errors. Additionally, when the users select either of the two values in the picklist, they receive different error messages above the field and are unable to save the opportunities. Why is this error likely occurring?

A	THE USERS DON'T HAVE ACCESS TO THE PICKLIST FIELD.	Incorrect. Contradicting validation rules for the same field will cause users to not be able to save the record.
B	THE TWO PICKLIST VALUES ARE UNAVAILABLE TO THE RECORD TYPE.	Incorrect. Picklists are not set by record type.
C	THE PICKLIST FIELD HAS CONTRADICTING VALIDATION RULES.	Incorrect. Contradicting validation rules for the same field will cause users to not be able to save the record.
D	THE USERS DON'T HAVE ACCESS TO THE LARGE ENTERPRISE RECORD TYPE.	Incorrect. In this scenario, access to a record type would not cause a validation rule to fail.

Exam Topic Flashcards

The following flashcards cover reports, dashboards, and data 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.

Card 1

How long is data stored in the Recycle Bin?	Up to 15 days

Card 2

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

Card 3

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.

Card 4

A System Administrator will use the Import Wizard to update existing Account records. Which two values can the Import Wizard use to find matching records?	• Account Naame • Site fields

Card 5

Which configuration option shows sales representatives the fields they must fill in prior to saving an opportunity?	Page Layout required fields

Card 6

Lookup filter	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.)

Card 7

Data Import Wizard	• A tool to import data for many standard Salesforce objects, including accounts, contacts, leads, solutions, campaign members, and person accounts. • Can also import data for custom objects • Can import up to 50,000 records at a time

Card 8

Validation Rules	Verify that the data a user enters in a record meets the standards you specify before the user can save the record

Card 9

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 are 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.

Card 10

CSV File	• Comma Separated Values (CSV) • A plain text file that contains a list of data • An accepted file format for Data Loader and Data Import Wizard

Card 11

What report should an administrator use to display the number of contacts related to an account?	Summary report with a report formula

Card 12

Which three reports can be used to display a list of the Top 10 Accounts on a dashboard?	• Tabular report with Rows to Display set to 10 • Summary report with a chart • Summary report without a chart

Card 13

What should an administrator do to organize the fields available on a report?	Create a custom report type.

Card 14

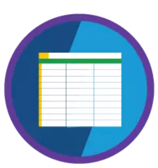
Tabular Report	This report is the simplest and fastest way to look at data. Similar to a spreadsheet, they consist simply of an ordered set of fields in columns, with each matching record listed in a row. Tabular reports are best for creating lists of records or a list with a single grand total. They can't be used to create groups of data or charts, and can't be used in dashboards unless rows are limited. Examples include contact mailing lists and activity reports.

Card 15

Summary Report	This report is similar to tabular reports, but also allow users to group rows of data, view subtotals, and create charts. They can be used as the source report for dashboard components. Use this type for a report to show subtotals based on the value of a particular field or when you want to create a hierarchical list, such as all opportunities for your team, subtotal by Stage and Owner.

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
	Project

Import and Export with Data Management Tools	
 Create Reports and Dashboards for Sales and Marketing Managers	Project
 Reports & Dashboards for Lightning Experience	Module
 Sales Reports for Lightning Experience	Module
 Lightning Experience Reports & Dashboards Specialist	Superbadge

Congratulations! You've studied up on data and analytics management. Next, let's take a look at workflow and automation.

Unit 2: Study Up on Workflow and Automation

Learning Objectives

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

- Identify the appropriate automation solution based on the capabilities of the tool.
- Describe capabilities and use cases for Flow
- Describe and demonstrate capabilities and use cases for the approval process.

Key Topics

This unit prepares you for the workflow and automation section of the Salesforce Administrator exam, which makes up 16% of the overall exam. This section of the exam tests these topics.

- Workflows
- Process Builder
- Flow Builder
- Approval Process

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

The administrator at Ursa Major Solar created a process in Process Builder that sends email alerts when a case with a high priority is created. A new support engineer who works remotely complains about not receiving the email alerts. All other users receive these email alerts.

How can a Salesforce administrator troubleshoot this issue?

A	VERIFY THE USER'S EMAIL ADDRESS.	Correct. You need to verify that the user's email address is correct, thus receiving the notifications.
B	CHECK THAT THE PROCESS IS ACTIVE.	Incorrect. Others are receiving the email alerts, so you know that the process is active.
C	CHECK THAT THE CORRECT EMAIL TEMPLATE IS USED.	Incorrect. Others are receiving the correct email from the email alerts, so you know the correct email template is used.
D	CHECK THAT THE PROCESS EVALUATION CRITERIA IS CORRECT.	Incorrect. Others are receiving the email, so you know the process evaluation criteria is correct when the process is being triggered.

Scenario 2

Ursa Major Solar created an action that sends a follow-up email to the customer two days after a case is closed. The administrator wants to verify that the process functions correctly. Which queue should the administrator view to monitor pending actions?

A	OUTBOUND MESSAGING DELIVERY QUEUE	Incorrect. Outbound Messaging Delivery Queue would show the messages that have already been sent and delivered.
B	MASS EMAIL QUEUE	Incorrect. The Mass Email Queue shows the mass emails that are sent out.
C	PAUSED FLOW INTERVIEWS	Correct. The Process Action Queue shows process actions and the administrator would be able to monitor pending process actions in this Queue.
D	BACKGROUND JOBS QUEUE	Incorrect. Time based actions do not show in the Background Jobs Queue. Background Jobs, such as when a parallel sharing recalculation is running can be monitored here.

Scenario 3

Ursa Major Solar has an auto-response rule to send emails when a customer submits a new case and an assignment rule to determine case ownership for new cases. In addition, the case object has validation rules to ensure that each case includes values for all fields needed by its owner to resolve the case.

In which order does Salesforce process the immediate actions associated with workflow rules and related business automations for a newly created record?

A	ESCALATION RULES, VALIDATION RULES, WORKFLOW RULES, AUTO-RESPONSE RULES, ASSIGNMENT RULES	Incorrect. Validation rules are evaluated before Escalation rules, and Auto-response rules are evaluated before Workflow rules.
B	VALIDATION RULES, ASSIGNMENT RULES, AUTO-RESPONSE RULES, WORKFLOW RULES, ESCALATION RULES	Correct. This is the correct order of evaluation.
C	WORKFLOW RULES, VALIDATION RULES, ASSIGNMENT RULES, ESCALATION RULES, AUTO-RESPONSE RULES.	Incorrect. Workflow rules are evaluated after Validation rules.
D	VALIDATION RULES, ESCALATION RULES, ASSIGNMENT RULES, AUTO-RESPONSE RULES, WORKFLOW RULES.	Incorrect. Workflow rules are evaluated before Escalation rules.

Scenario 4

Ursa Major Solar has a team of account managers that requested email alerts any time an opportunity or case is created on accounts that they own.

What is the minimum number of workflows needed to accomplish this task?

A	ONE WORKFLOW RULE WITH TWO EMAIL ALERTS	Incorrect. Each workflow rule applies to a single object. In this solution the email alerts would be for the same object.
B	TWO WORKFLOW RULES WITH ONE EMAIL ALERT EACH	Correct. Each workflow rule applies to a single object. Opportunity and/or case would need a separate workflow for each object.
C	NO WORKFLOW RULES, BUT TWO EMAIL ALERTS	Incorrect. Email alerts need a workflow to define criteria for the email to be sent.
D	FOUR WORKFLOW RULES FOR CREATE AND UPDATE ON OPPORTUNITIES AND ACCOUNTS	Incorrect. Opportunities and cases are created on accounts by the users. The email alerts are to communicate to the account managers that there is a record on their account.

Scenario 5

Ursa Major Solar has created an automated approval process to quickly communicate and improve their customer service. What are two final approval actions in an approval process?

A	CREATE A CHATTER POST.	Incorrect. Chatter posts are not a final approval action.
B	ADD AN EMAIL ALERT.	Correct. This is a final approval action.
C	SEND AN OUTBOUND MESSAGE.	Correct. Sending an outbound message is a final approval action in an approval process.
D	CALL APEX.	Incorrect. This is not a final approval action in an approval process.

Exam Topic Flashcards

The following flashcards cover workflows and automation. 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

Ursa Major Solar wants to assign a task automatically to account managers when a customer's agreement is about to expire. How should an administrator configure this functionality?	Create a Time-based Workflow on Account with a rule criteria of Agreement End Date > TODAY().

Card 2

An administrator created a workflow rule that sends email alerts when a case with a high priority is created. A new support engineer who works remotely at Ursa Major Solar complains about not receiving the email alerts. All other users at Ursa Major Solar receive these email alerts. How can an administrator troubleshoot this issue?	Verify the user’s email address

Card 3

Ursa Major Solar wants to create a workflow rule to send an email alert to members of its board of directors, none of whom use Salesforce. How many of the board members can be added to a single email alert?	Up to 5 additional email address can be added to the email alert.

Card 4

Flow	An application that can execute logic, interact with the Salesforce database, call Apex classes, and collect data from users.

Card 5

Quick Action	• Can be object-specific or global action • Only Create, Update, and Log a Call actions are supported • Can also use actions in a process, and can only set values for fields that are part of the action’s layout

Card 6

Process Trigger	• Every process includes a trigger, which tells the process when to start.
	• How you configure that trigger depends on what type of process you’re creating.
	    ○ Record change
	    ○ Event
	    ○ Invokable

Card 7

Approval Process	• Automates how records are approved in Salesforce • Specifies each step of approval including from whom to request approval and what to do at each point of the process.

Card 8

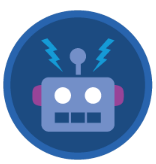
Delete an Approval Process	• Before you delete an approval process:, make sure it’s inactive. • Delete pending approval requests that are associated with it, and remove them from the recycle bin.

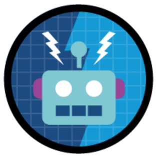
Card 9

Activate an Approval Process	An approval process must have at least one step before you can activate it. After an approval process is activated, you can't add, delete, or change the order of the steps or change its reject or skip behavior, even if the process is inactive.

Related Badges

Looking for more information? Explore these related badges.

Badge	Content Type
 Salesforce Flow	Module
 Automate Business Processes for a Recruiting App	Project
 Build a Discount Approval Process	Project

 Quick Start: Process Builder	Project
 Build a Battle Station App	Project

Practice Exam

Congrats! You've completed your Salesforce Administrator certification prep. Ready to put your knowledge to the test? The link below will take you to a timed Salesforce Certified Administrator interactive practice test. This practice test is designed to mimic the actual Administrator exam. When taking the test, be sure to read each question carefully then click on the answer you believe to be correct. Note: some questions may have more than one correct answer. If you are unsure of an answer and would like to come back to it later, click “Review” in the upper right-hand corner to mark a question for review.

When you reach the end of your practice test, click “Submit” to submit your answers. You'll be taken to a results screen which will display your overall practice test score, the time taken to complete the test, and how you performed on each section. If you'd like to review questions and answers in detail, click “Review” from the results page. You may print your results by clicking the “View/Print” button. Good luck, Trailblazer!