Administrator Certification Prep: Applications and Activities

Unit 1: Review Sales and Marketing Applications

Learning Objectives

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

- Given a scenario, identify the capabilities and implications of the sales process.
- Given a scenario, identify the appropriate sales productivity features using opportunity tools.
- Describe the capabilities of lead automation tools and campaign management.

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.

- Sales processes
- Opportunities
- Products
- Price Books
- Leads
- Campaigns
- Content

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 sales and marketing applications 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: Applications and Activities guide.

Exam Practice Questions

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

Scenario 1

Ursa Major Solar has created a new product line of solar panels with a special sales team to sell these products. The sales process for the new line is more complex than the current sales process and requires additional stages to the sales path.

How should the System Administrator configure Salesforce to ensure only the appropriate stages are visible based on the product line?

A	CREATE A SALES PROCESS AND OPPORTUNITY RECORD TYPE FOR EACH PRODUCT LINE.	Correct. Two configurations need to be made; 1) Create a new sales process to determine which stages will appear for this new product line. 2) Create a new Opportunity record type to display a unique page layout for this new product line.
B	CREATE A VALIDATION RULE TO DISPLAY THE APPROPRIATE STAGES BASED ON PRODUCT LINE.	Incorrect. Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. Therefore, a validation rule would not meet the needs of displaying the appropriate stages to the new sales team.
C	CREATE NEW FORECAST CATEGORIES AND ASSIGN THE NEW STAGE PICKLIST VALUES TO THOSE CATEGORIES.	Incorrect. A forecast category is the category within the sales cycle to which an opportunity is assigned based on its opportunity stage. Creating new forecast categories would not result in the appropriate stages becoming visible for the new sales team.
D	CREATE A VALIDATION RULE TO DISPLAY THE APPROPRIATE STAGES BASED ON THE USER'S ROLE.	Incorrect. Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. Therefore, a validation rule would not meet the needs of displaying the appropriate stages to the new sales team.

Scenario 2

Ursa Major Solar's Sales operations director has noticed an increase in sales reps logging opportunities without products. The operations team then has to go back into each opportunity after the fact and add products.

Which configuration change should the system administrator make to help sales reps remember to add products to every opportunity?

A	CREATE A RELATED LIST TO ENABLE THE USER TO VIEW THE RELATED PRODUCTS.	Incorrect. Adding a related list would not necessarily remind Sales Reps to add Products when logging Opportunities.
B	ENABLE THE OPPORTUNITY SETTING TO PROMPT USERS TO ADD PRODUCTS TO OPPORTUNITIES.	Correct. There is a setting that can be toggled on/off to prompt users to add a Product to an Opportunity.
C	CREATE A WORKFLOW RULE ON THE OPPORTUNITY OBJECT TO ADD A DEFAULT PRODUCT TO OPPORTUNITIES WITH NO PRODUCTS.	Incorrect. Adding a default Product to every Opportunity without a Product listed would not fix the problem of Sales Reps not adding Products when logging Opportunities.
D	SET THE ORG-WIDE DEFAULTS FOR PRICE BOOKS TO USE AND PRODUCTS TO READ ONLY.	Incorrect. Access and visibility of Price Books and Products would not remind Sales Reps to add Products when logging Opportunities.

Scenario 3

Ursa Major Solar's newest product line has just been announced. The web form on the Ursa Major Solar website is generating a lot of leads where prospects have indicated interest in particular products. These leads are automatically imported directly into Salesforce.

Which two features should the system administrator use to assign ownership of a Lead to the appropriate product team using the custom Lead field Product Interest?

A	ASSIGNMENT RULES	Correct. Assignment rules define conditions that determine how leads or cases are processed. In this scenario, when a potential customer indicates interest in a certain product (custom Lead field Product Interest) in the web form, the lead is generated and assigned to the appropriate product team.
B	ESCALATION RULES	Incorrect. Escalation Rules are used to specify the conditions under which a case escalates. Leads are not cases, so Escalation Rules do not apply in this situation.
C	LEAD TEAMS	Incorrect. A Lead Team refers to a group of users who can view/access a lead. It will not assign ownership as requested.
D	QUEUES	Correct. Queues prioritize, distribute, and assign records to teams who share workloads. In this scenario, it was indicated that the Lead needs to be assigned to the appropriate product teams so queues are needed.

Scenario 4

Sales representatives at Ursa Major Solar are working on opportunities and need to see how their colleagues have effectively managed other opportunities with comparable products, competing against the same competitors. Which two features should an administrator use to allow for this?

A	OPPORTUNITY DASHBOARD	Correct. An opportunity dashboard allows reporting and comparison of products.
B	CHATTER GROUPS	Correct. A chatter group will allow for discussion and sharing of the dashboard.
C	OPPORTUNITY UPDATE REMINDERS	Incorrect. Reminder updates will not allow food comparison or discussion.
D	BIG DEAL ALERTS	Incorrect. Big Deal Alerts automatically email your users whenever an opportunity reaches a threshold of amount and probability.

Exam Topic Flashcards

The following flashcards cover sales processes, opportunities, products, and leads. 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. Custom fields in the Lead object can be mapped to which two types of fields?	• Opportunity • Account • Contact

Card 2

Ursa Major Solar has an inside sales team that only sells warranty renewals and an outside sales team that only sells products. Each type of sale captures	Create a page layout, sales process, and record type for each type of sale.

different information and has a different sales cycle. How should the system administrator configure Salesforce to meet these requirements?	

Card 3

Ursa Major Solar offers a variety of products that are comparable to products from other companies. Sales representatives request a method to track product strengths and weaknesses compared to those offered by other vendors. What should the system administrator implement?	Competitors on the opportunity page layout

Card 4

Ursa Major Solar wants the sales team to access information about Closed Won opportunities with a common competitor for all pending big deals. Which set of features should the system administrator implement?	Competitors and Similar Opportunities

Card 5

How should the system administrator implement biweekly notifications for sales reps that include opportunities that need attention based on the opportunity owner's last login, past due opportunities, and all opportunities that have not been updated in the last 30 days?	Create opportunity update reminders.

Card 6

Ursa Major Solar sells through many different reseller networks. Each reseller's deals are tracked on separate opportunities. The sales manager is concerned that the pipeline report is not accurate	Change the forecast category to Omitted on the duplicate opportunities.

due to multiple opportunities for the same end customer. How should the sales process be modified to ensure opportunities are not double-counted in the pipeline?	

Card 7

Which two objects can be related to campaign members?	• Leads • Contacts

Card 8

How can multiple Campaign records be associated with a single opportunity?	Campaign Influence

Card 9

Which feature tracks how often a file is viewed?	Content Deliveries

Card 10

Which two related lists should be added to the Opportunity page layout to track how Campaigns contribute to the overall pipeline?	• Campaign Influence • Contact Roles

Related Badges

Looking for more information? Explore these related badges.

Badge	Content Type
 Leads & Opportunities for Lightning Experience	Module
 Opportunity Management	Module
 Campaign Basics	Module
 Manage Products, Prices, Quotes, and Orders	Project
 Process Automation Specialist	Superbadge

Congratulations! You've studied up on sales and marketing applications. Next, let's take a look at service and support applications.

Unit 2: Review Service and Support Applications

Learning Objectives

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

- Describe the capabilities of case management.
- Given a scenario, identify how to automate case management.

Key Topics

This unit prepares you for the user setup section of the Salesforce Administrator exam, which makes up 11% of the overall exam. This section of the exam tests these topics.

- Case management
- Support processes
- Assignment rules
- Case escalation rules
- Auto-response rules
- Web-to-case
- Email-to-case
- Case teams
- Knowledge
- Sites using Experience Cloud (formerly Communities)

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

Exam Practice Questions

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

Scenario 1

Ursa Major Solar provides various levels of customer support, based on the terms of the customer's support level agreement. The VP of support wants an automated way to notify the support team when an unresolved case may violate the support level agreement.

Which feature should be used to alert support managers when a case is in jeopardy of violating the customer's support level agreement?

A	CASE QUEUES	Incorrect. Case Queues prioritize, distribute, and assign records to teams who share workloads. However, just placing a case in a queue does not alert a Support Manager that a Case is in jeopardy.
B	AUTO-RESPONSE RULES	Incorrect. Auto-Response Rules send automatic email responses to lead or case submissions based on the record's attributes. For example, set up an auto-response rule to send quick replies to customers to let them know someone at your company received their inquiry or details about their issue.
C	ESCALATION RULES	Correct. Escalation rules automatically escalate cases when the case meets the criteria defined in the rule entry.
D	CASE ASSIGNMENT RULES	Incorrect. Case Assignment Rules define conditions that determine how leads or cases are processed. However, as soon as a match is found, Salesforce processes the item and stops evaluating the rule entries for that item.

Scenario 2

Ursa Major Solar has noticed an uptick in support cases that could be easily resolved if the customers had access to the proper documentation. Therefore, Ursa Major Solar wants to create a knowledge base where articles can be classified into categories.

What are two benefits of using Data Categories with Salesforce Knowledge?

A	ARTICLE OWNERS CAN TRACK VIEWS.	Incorrect. The use of Data Categories does not affect if article owners can track article views.
B	ARTICLES CAN BE CLASSIFIED INTO GROUPS.	Correct. Data Categories with Salesforce Knowledge allow articles to be classified into groups which makes the articles easier to find.
C	ARTICLE ACCESS CAN BE CONTROLLED.	Correct. A benefit of Data Categories with Salesforce Knowledge allows controlled article access. For example, US users could be limited to knowledge articles specific to US products vs European users only have access to knowledge articles regarding products exclusive to Europe.
D	ARTICLES CAN BE REFERENCED IN CHATTER POSTS.	Incorrect. Data Categories do not affect if articles can be posted to Chatter.

Scenario 3

Ursa Major Solar is looking to reduce support costs by allowing customers to work together to answer one another's questions and solve problems Which feature should a salesforce administrator use to allow its customers to interact with each other and share best practices?

A	SITES USING EXPERIENCE CLOUD (FORMERLY COMMUNITIES)	Correct. Sites using Experience Cloud are a great way to share information and collaborate with people who are key to your business processes, such as customers, partners, or employees. This also includes collaboration between customers.
B	CAMPAIGNS	Incorrect. A campaign is an outbound marketing project that you want to plan, manage, and track within Salesforce. It can be a direct mail program, seminar, print advertisement, email, or other type of marketing initiative.
C	OMNI-CHANNEL	Incorrect. Omni-Channel routes any type of incoming work item to the most qualified, available support agents in your call center. It is not a collaboration tool between customers.
D	MASS EMAILS	Incorrect. Mass Emails are inefficient as they do not allow customers to interact with each other to share best practices.

Exam Topic Flashcards

The following flashcards cover case management, knowledge, assignment rules, and sites using Experience Cloud. 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

Which configuration action should be performed to ensure every Case gets assigned to a valid Owner?	Define the Default Case Owner in Support Settings.

Card 2

Support Representatives at Ursa Major Solar want the same technical engineer group to be associated with each new case. What should a system administrator define to implement this requirement?	A case assignment rule to associate the case team

Card 3

What is a potential benefit of using Suggested Solutions?	Reduced support costs

Card 4

What Salesforce feature should a company implement to provide a method for its resellers to track their leads and opportunities?	Partner Site using Experience Cloud

Card 5

A system administrator enables Case Feed Actions and Feed Items in Support Settings. With the appropriate profile permissions enabled, what change will users see?	Cases use feed layouts rather than standard page layouts.

Card 6

Ursa Major Solar wants internal support requests to be directed to any of the IT representatives. They want external support requests to be directed to customer support representatives based on the contact's location. Who should the system administrator use to set this up?	Assignment Rules and Queues

Card 7

Web-to-Case	Gather customer support requests directly from your company's website and automatically generate new cases.

Card 8

Sites using Experience Cloud (formerly Salesforce Communities)	• Provide a way for employees, customers, and partners to connect in one place. • Companies can collaborate and communicate with people outside of the company who are key to the business.

Card 9

Assignment Rules	Define conditions that determine how leads or cases are processed.

Card 10

Auto-response Rules	Send automatic email responses to lead or case submissions based on the record's attributes.

Card 11

Salesforce Knowledge	• Create and manage a knowledge base with your company information • Securely share it when and where it's needed.

Card 12

Case Escalation Rules	Escalation rules automatically escalate cases when the case meets the criteria defined in the rule entry.

Related Badges

Looking for more information? Explore these related badges.

Badge	Content Type
 Service Cloud for Lightning Experience	Module
 Set Up Salesforce Knowledge	Project
 Create a Process for Managing Support Cases	Project
 Experience Cloud Basics	Module

 Set Up a Customer Site with Experience Cloud	Project

Congratulations! You’ve studied up on service and support. Up next, dive into the exam section on productivity and collaboration. Let’s go!

Unit 4: Study Up on Productivity and Collaboration

Learning Objectives

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

- Describe the capabilities of activity management such as managing tasks, events, public calendars, and multi-day events.
- Describe the features of Chatter such as feed, groups, following, and security.
- Describe the capabilities of the Salesforce mobile app.
- Identify use case for AppExchange applications.

Key Topics

This unit prepares you for the standard and custom objects section of the Salesforce Administrator exam, which makes up 7% of the overall exam.

This section of the exam tests these topics.

- Activities
- Chatter
- Salesforce mobile app
- Compact Layout
- Lightning Web Browser
- AppExchange

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 sales director at Ursa Major Solar has a team of 50 sales reps located around the world. The sales director's team uses the calendar feature in Salesforce to access the team's busy schedule. However, team members each log their all-day events differently and the sales director wants some uniformity.

How should a sales rep create an all-day event in Salesforce?

A	USE A TASK FOR AN ALL-DAY EVENT BECAUSE THEN NO TIME FIELDS ARE NEEDED.	Incorrect. Tasks within Salesforce are used mostly as to-dos or reminders. Tasks should not be used in lieu of events.
B	CHECK THE ALL-DAY EVENT CHECKBOX ON THE EVENT.	Correct. Using the all-day event checkbox is the most efficient way to log an all-day event. This avoids the office hours discrepancies of sales reps across multiple time zones.
C	ENSURE THE EVENT IS SCHEDULED FOR TIMES WITHIN THE START AND END OF DAY HOURS.	Incorrect. Start and End of Day hours differ among the team, so this is not a consistent option for the entire team.
D	ASK THE SYSTEM ADMINISTRATOR TO CHECK ALL-DAY EVENTS IN THE ACTIVITY SETTINGS.	Incorrect. This option is inefficient as the System Administrator shouldn't have to fix each sales rep's events.

Scenario 2

Ursa Major Solar is implementing Salesforce within its organization. All users at Ursa Major Solar have been loaded into the system but a small group of users have been identified to be the test users before full company adoption. These test users will provide feedback via Chatter to ensure all features and tools are adjusted to work for the company-wide deployment.

Which two actions allow the system administrator to limit Chatter access during roll-out to a subset of Salesforce users?

A	CREATE A PERMISSION SET WITH THE ENABLE CHATTER PERMISSION FOR THE SUBSET OF USERS.	Correct. A permission set is a collection of settings and permissions that give users access to various tools and functions, such as Chatter.
B	ADD THE SUBSET OF USERS TO THE COMPANY-WIDE CHATTER GROUP.	Incorrect. Adding the subset of users to the company-wide Chatter group does not limit access to Chatter to just the needed subset of users.
C	EDIT A PROFILE TO ENABLE CHATTER FOR THE SUBSET OF USERS.	Correct. Profiles define how users access objects and data, and what they can do within the application. When users are created, they are assigned a profile. In this situation, customizing the profile settings of the subset of users can limit Chatter access to just the specified subset of users.
D	CREATE AN EMAIL INVITATION FOR THE SUBSET OF USERS.	Incorrect. An email invitation is not a way to limit Chatter access as this does not limit other users from accessing Chatter.

Scenario 3

As Salesforce adoption has increased throughout Ursa Major Solar, the sales reps need access to the Salesforce mobile app while on the road. However, the Salesforce Mobile App needs to be customized to fit their needs. Which two functions can be customized for the Salesforce mobile app?

A	FIELD PERMISSIONS	Incorrect. Field security cannot be customized exclusively for the Salesforce mobile app. The same field permissions on the desktop versions are reflected on the mobile app.
B	NAVIGATION MENU CONTENT	Correct. The navigation menu can be customized for the Salesforce mobile app.
C	CUSTOM OBJECTS	Incorrect. Custom objects cannot be customized exclusively for the Salesforce mobile app. Custom objects have the same read/write access on the desktop version as they do on the mobile app.
D	OBJECT COMPACT LAYOUT	Correct. The Object Compact layout can be customized for the Salesforce mobile app.

Scenario 4

Ursa Major Solar uses Outlook for its email needs. As Ursa Major Solar has begun to implement Salesforce, Sales Reps are concerned that Salesforce won't integrate with Outlook and they will be forced to change email providers (which they don't want to do).

What can the system administrator synchronize between Salesforce and Outlook using Lightning for Outlook?

A	ACCOUNTS	Incorrect. Account information can be accessed via Lightning for Outlook but Account information is not synchronized (downloaded) from Salesforce to Outlook.
B	EVENTS	Correct. Events in Salesforce can be synchronized between Salesforce and Outlook.
C	TASKS	Correct. Tasks are not synchronized between Salesforce and Outlook.
D	NOTES	Incorrect. Notes are not synchronized between Salesforce and Outlook.

Scenario 5

The managers at Ursa Major Solar asked the administrator to quickly provide access to sales reports and dashboards. How can this be done?

A	BUILD REPORTS AND DASHBOARDS.	Correct. Building all the reports and dashboards would take longer than using the Salesforce Adoption Dashboards app from the AppExchange.
B	USE THE SALESFORCE AUTO-REPORT BUILDER.	Incorrect. The report builder does not auto generate reports.
C	SEARCH THE APPEXCHANGE FOR FREE ADOPTION REPORT APPS.	Incorrect. Salesforce Adoption Dashboards app can be found on the AppExchange.
D	LOG A CASE TO SALESFORCE SUPPORT.	Incorrect. Salesforce support is not needed.

Exam Topic Flashcards

The following flashcards cover Chatter, tasks, and events. 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 should a Chatter user send a message to another Chatter user that cannot be viewed by anyone else?	Post a private message to the recipient.

Card 2

Activities	Records, either tasks or events, of the interactions your organization has with records such as your accounts, contacts, and opportunities.

Card 3

Chatter Groups Features	Users in a Chatter group can: • Collaborate in a private, public, or unlisted group. • Use Announcements for important messages. • Post updates, files, and links. • Include customers in private groups.

Card 4

Which option can be added to Outlook Publisher Layouts?	Quick Actions

Card 5

Lightning for Outlook	• Link emails in Microsoft Outlook to contacts, leads, accounts, opportunities,

Some users complain about the Record Type selection screen when creating new Opportunities. What two actions should the administrator take to allow these users to bypass choosing a record type?	and cases in Salesforce. It can also relate Events to records within Salesforce. • Relate events to records within Salesforce

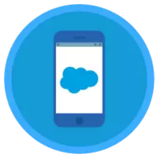
Card 6

Salesforce Mobile App	Gives you access to the same information you see on your computer, but organized for getting work done while away from the office.

Related Badges

Looking for more information? Explore these related badges.

Badge	Content Type
 Chatter for Lightning Experience	Module
 Lightning Experience Productivity	Module
 Lightning Experience for Salesforce Mobile App	Module

 [Salesforce Mobile App Customization]	Module
 [Outlook Integration]	Module

Congratulations! You've covered 30% of the Administrator Certification test material in this badge. That's a lot! You've reviewed these sections:

- Sales and marketing applications
- Service and support applications
- Productivity and collaboration

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