

## **Salesforce Admin Syllabus**

### **Topic No. 1: ORGANIZATION SETUP**

- Describe the components of the company profile (e.g., fiscal year, business hours, currency management, default settings, company information).

### **Topic No. 2: USER SETUP**

- Identify the steps to set up and/or maintain a user (e.g., assign licenses, reset passwords, and resolve locked user accounts).
- Given a scenario, troubleshoot common user access and visibility issues.

### **Topic No. 3: GLOBAL USER INTERFACE**

- Distinguish between the various UI features that an administrator controls, including the implications (e.g., UI settings, search settings, list views, home page layouts).

### **Topic No. 4: SECURITY AND ACCESS**

- Explain the various organization security options (e.g., passwords, IP restrictions, identity confirmation, network settings).
- Describe the features and capabilities of the Salesforce sharing model (e.g., record ownership, organization-wide defaults, roles and the role hierarchy, manual sharing, sharing rules and public groups).
- Given a scenario, apply the appropriate security controls (e.g., organizationwide defaults, roles and the role hierarchy, manual sharing, sharing rules and public groups).

- Describe the various settings and permissions a profile controls (e.g., IP access, login hours, record types, access to tabs, permissions, object permissions, fieldlevel security).
- Given a scenario, determine the appropriate use of a custom profile.  
Weighting 1% Weighting 15% Weighting 9% Weighting 1%

### **Topic No. 5: STANDARD AND CUSTOM OBJECTS**

- Describe the standard object architecture and relationship model.
- Explain how to create, delete, and customize fields, page layouts, and list views for custom and standard objects.
- Given a scenario, determine the appropriate fields and page layouts for custom and standard objects.
- Explain how to create, delete, and customize record types for custom and standard objects.
- Given a scenario, determine the appropriate record types and business processes for custom and standard objects.
- Explain the implications of deleting fields.
- Describe when to use and how to create formula fields.

### **Topic No. 6: SALES AND MARKETING APPLICATIONS**

- Given a scenario, identify the capabilities and implications of the sales process.
- Given a scenario, identify when to apply the appropriate sales productivity features (e.g., big deal alerts, update reminders, similar opportunities, competitors, team selling).
- Describe the capabilities of products and price books.

- Describe the capabilities of lead management (e.g., lead conversions, lead source, lead field mapping).
- Given a scenario, identify how to automate lead management (e.g., queues, assignment rules, web-to-lead, and auto-response).
- Describe the capabilities of campaign management (e.g., hierarchies, influences, campaign members).

### **Topic No. 8: SERVICE AND SUPPORT APPLICATIONS**

- Describe the capabilities of case management (e.g., case processes, case settings, and case comments).
- Given a scenario, identify how to automate case management (e.g., case assignment, auto-response, escalation, web-to-case, email-to-case, case teams).
- Describe the capabilities of solution management (e.g., settings, categories, processes).
- Describe the basic capabilities of portals. ♣ Describe the capabilities of the Community application (e.g. Ideas, Answers).
- Describe the capabilities of Salesforce Knowledge. Weighting 18%  
Weighting 6% Weighting 9%

### **Topic No. 9: ACTIVITY MANAGEMENT**

- Describe the capabilities of activity management (e.g., manage tasks, events, public calendars, multi-day events, cloud scheduler).

### **Topic No. 10: CHATTER**

Describe the features of Chatter (e.g., feed, groups, following, security).

### **Topic No. 11: DATA MANAGEMENT**

- Describe the considerations when importing, updating, transferring, and mass deleting data (e.g., CSV files, field matching, matching types, record IDs, external IDs, duplicate records).
  - Given a scenario, identify tools and use cases for managing data (e.g., dataloader, data import wizard).
  - Describe the capabilities and implications of the data validation tools.
  - Describe the different ways to back up data (e.g., weekly data export service, exports, dataloader).
- CONTENT AND FOLDER MANAGEMENT**
- Describe the capabilities of Salesforce Content (e.g., presentation assembly, content delivery, content packs, workspaces, tags).
  - Describe how folders can be used to organize and secure communication templates, dashboards, reports, and documents.

### **Topic No. 12: ANALYTICS, REPORTS AND DASHBOARDS**

- Describe the options available when creating or customizing a report (e.g., report type, report format, fields, summarizing data, filtering data, charting, scheduling, and conditional highlighting).
- Describe the impact of the sharing model on reports.
- Describe the options available when creating and modifying dashboards (e.g., dashboard components, data sources, chart types, scheduling, and running user).
- Describe the capabilities of custom report types. Weighting 3 3%%  
Weighting 1% Weighting 11% Weighting 13% Weighting 2%

### **Topic No. 13: WORKFLOW AUTOMATION**

- Describe when workflow are evaluated.

- Describe the capabilities of workflow rules and actions.
- Given a scenario, identify the appropriate workflow solution.
- Describe capabilities and use cases for the approval process.

#### **Topic No. 14: DESKTOP AND MOBILE ADMINISTRATION**

- Describe the capabilities of Salesforce Mobile.
- Describe the installation and synchronization options of Salesforce for Outlook.

#### **Topic No. 15: APPEXCHANGE**

- Identify use cases for AppExchange applications