



Salesforce Certified Administrator

KSU Exam Preparation Guide

March 2016

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Salesforce Certified Administrators

As an Administrator with broad knowledge of Salesforce applications, you configure and manage Sales and Service Cloud applications and suggest ways for your company to get even more from additional features and capabilities.

With an Administrator credential, you'll demonstrate your core knowledge and your ability to take on the responsibilities of this job. It's an important investment in your career as an Administrator. To earn these credentials, you must pass a multiple-choice exam at a testing center or in an online-proctored environment.

If you are comfortable with user management and security, have good experience with workflow and approvals, know how to get the most out of core Sales and Service Cloud features, and are a master in reporting, then you may be ready for the Administrator exam. If you are already a Certified Administrator and know how to build advanced analytics, automate, and extend using more complex functionality, you may be ready for the Advanced Administrator exam.

The Study Guides for these credentials include a detailed listing of what the exams cover and what else you should know to become a Salesforce Certified Administrator or Advanced Administrator.

With a Salesforce Administrator Certification, you are granted permission to download the certified logo to use on business cards, email signatures, and professional networking sites. You will be required to maintain your credential by passing short online maintenance exams after each major Salesforce release. Release training and a release exam schedule will be provided to help you keep your credential. To take it to the next level, consider preparing for the Advanced-level credential.

This preparation guide will explain the recommended steps involved in preparing for the Salesforce Administrator Certification Exam, and provide information on accessing various study tools and materials available to aid in learning the information needed to earn the certification.

About The Exam

Administrator Exam



The Salesforce Certified Administrator exam is intended for an individual who has experience performing as a Salesforce Administrator. Here are examples of the concepts you should understand to pass the exam:

- Manage users, data, and security
- Maintain and customize Sales Cloud and Service Cloud applications
- Build reports, dashboards, and workflow

About the Exam

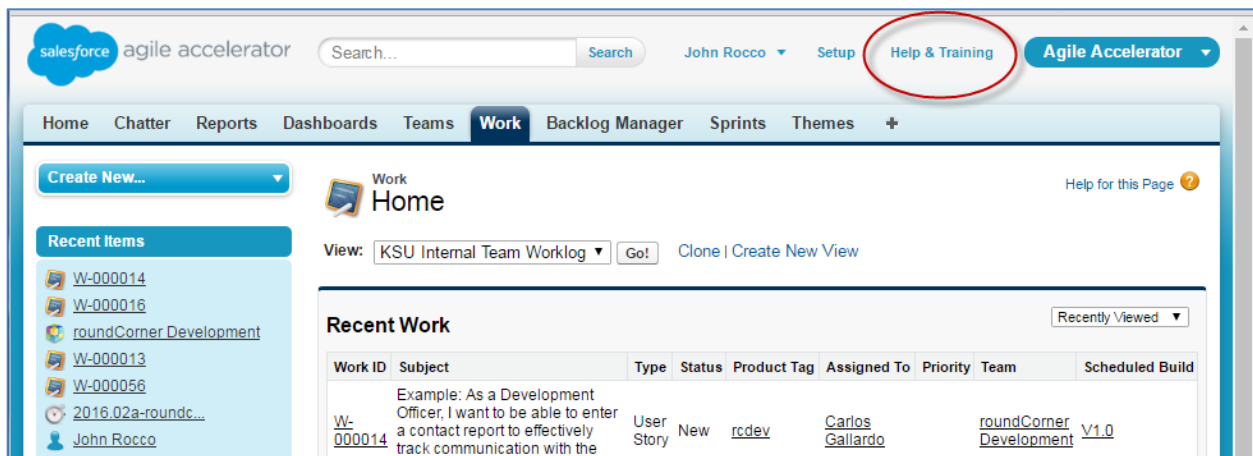
- 60 multiple-choice questions
- 90 minutes allotted to complete the exam
- 65% is the passing score
- Registration fee is USD 200
- Retake fee is USD 100
- No hard-copy or online materials may be referenced during the exam
- Available in English, French, German, Spanish and Brazilian Portuguese, additional details [here](#)
- No prerequisites; [Administration Essentials for New Admins \(ADM 201\)](#) course is recommended
- For a full exam outline, click [here](#) for the Study Guide

<http://certification.salesforce.com/administrators>

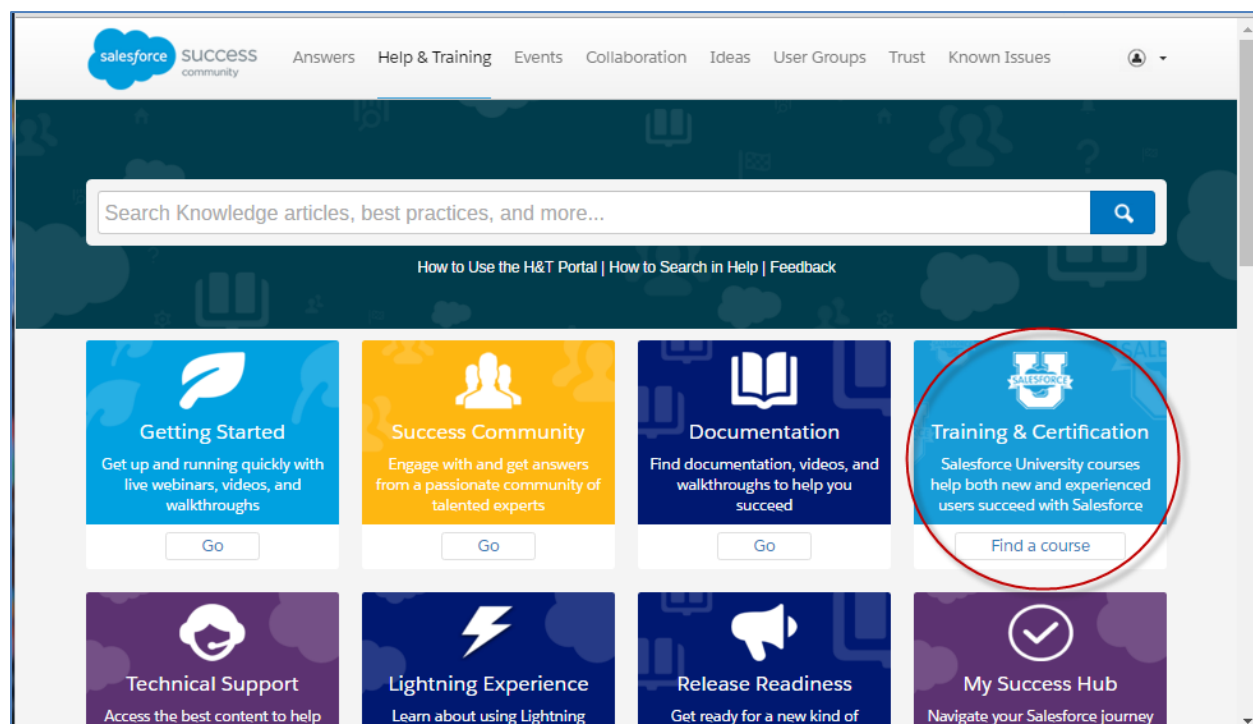
Administrator Training in Salesforce

Once logged in, there are many training resources available through the Salesforce.com website.

1. go to: <https://login.salesforce.com/>
 2. Enter your Username and Password
 3. Click Log In
- Click on **Help & Training**



The **Help & Training** link is located in the top right corner of the Salesforce.com web page.



Salesforce study courses and certification information may be accessed in the Help & Training Portal via the “Find a Course” link in the section for Training & Certification.

The screenshot displays the Salesforce Success Community Training Catalog interface. At the top, the navigation bar includes links for Answers, Help & Training, Dreamforce, Collaboration, Ideas, Featured Groups, Trust, and Known Issues. The main header shows the path Home > Training Catalog and the page title Training Catalog. Below the header, there are tabs for Find a Course and My Training, with a shopping cart icon showing 0 items. A search bar prompts users to 'Start a new search for courses'. The left sidebar contains filter sections: Content Type (with 'Online Courses' selected), Language (with 'English' selected), Product(s) (with 'Marketing Cloud' selected), and Job Role(s) (with 'Beginning Administrator' selected). The main content area displays search results for 'Administration Essentials for New Admins', including a description and a list of items. Other courses like 'Getting Started with Reports and Dashboards', 'Social Studio 101', and 'Marketing Cloud 101' are also visible.

Many courses are available to increase user knowledge. Courses may be found by searching for key words, filtering by items such as course content type or job roles, or by scrolling through the many selections offered by Salesforce.com.

Recommended Training and References

As preparation for this exam, Salesforce Training and Certification recommends a combination of six or more months of hands-on experience as a Salesforce system administrator, training course completion, and self-study in the areas listed in the Exam Outline section of the study guide.

Salesforce Training and Certification recommends the following instructor-led and online courses to guide your study:

- *Instructor-led course: Administration Essentials for New Admins (ADM-201)*
- *Instructor-led course: Preparing for Your Salesforce Administrator Certification (CRT-101)*
***Note:** Kent State University has purchased the online courses, and will not be scheduling any instructor-led sessions.
- *Study guide - [Salesforce Certified Administrator Study guide-Winter 2016](#)*
- *Online course: **Administration Essentials for New Admins***
- *Online course: **Administration Essentials for the Service Cloud***
- *Other helpful resources:*
 - *Online course: **Analyze Your Data with Reports***
 - *Online course: **Getting a Head Start with Chatter***
 - *Online course: **Getting Started with Managing Data***
 - *Online course: **Managing Users and Troubleshooting Login Issues***
 - *Online course: **Summarize Your Data with Dashboards***
- *Trailhead: <https://developer.salesforce.com/trailhead>*

Launch online training from your Salesforce application by clicking the **Help & Training** link in the upper right corner of the screen (requires login) and searching for the desired courses, listed above.

In addition, Salesforce University recommends reviewing online Documentation, Tip Sheets, and User Guides by searching for the topics listed in the Exam Outline section of the Study Guide and studying the information related to those topics. Documentation, Tip Sheets, and User Guides can also be accessed through **Help & Training**. Documentation is also available in PDF format here: <https://na1.salesforce.com/help/pdfs/en/sf.pdf>.

On-Line Courses

Salesforce University Online Courses

Salesforce University courses are separated into modules to allow for learning and studying in sections. Each module contains various tools to offer different educational methods.

Presentation – Each module will include a presentation to deliver detailed information about the module subject. They will vary in length depending upon the complexity of the subject. The presentations may include intermittent Knowledge Checks to act as a brief review of the information and to assure understanding of the subject matter.

Knowledge checks – Knowledge Checks are brief, basic questions of understanding that may appear within a presentation or at the end of the module. They are quick assessments of subject comprehension designed to restate the module information and assist in learning. If the questions are answered incorrectly, the appropriate response and reasoning are explained, and the user may opt to repeat the question and amend their answer.

Tasks – Many sections within the presentations and modules include hands-on opportunities to apply the material by including tasks to be accomplished labeled, “Your Turn to Practice”. These will vary in estimated length of time to accomplish depending upon the subject. The practical assignments are delivered through a “Resources” tab found to the left of the presentation.

The Salesforce University recommended courses are estimated as follows:

Administration Essentials

	Modules	Presentation (mins)	Knowledge Checks	Practical Assignments	
				Tasks	Estimated Time (hrs)
1	Overview	25:12	0	6	0:30
2	Getting Your Organization Ready for Users	51:48	1	10	1:10
3	Setting Up and Managing Users	25:24	1	6	0:40
4	Security and Data Access	50:48	4	12	1:45
5	Customization: Fields	1:08:49	3	18	3:25
6	Managing Data	39:34	1	8	1:05
7	Reports and Dashboards	55:51	1	12	1:15
8	Automation	59:34	1	8	1:25
6:17:00					11:15

Approximate time for completion 17-19 Hours

Administration Essentials for the Service Cloud

	Modules	Presentation (mins)	Knowledge Checks	Practical Assignments	
				Tasks	Estimated Time (hrs)
1	Administration Essentials for the Service Cloud	1:01:42	0	0	0:00
1:01:42					0:00

Approximate time for completion 1-1.5 Hours

Other Helpful Resources

	Modules	Presentation (mins)	Knowledge Checks	Practical Assignments	
				Tasks	Estimated Time (hrs)
1	Analyze Your Data with Reports	35:46	5	0	0:00
2	Getting a Head Start with Chatter	33:14	1	0	0:00
3	Getting Started with Managing Data	28:22	0	0	0:00
4	Managing Users and Troubleshooting Login Issues	13:01	4	0	0:00
5	Summarize Your Data with Dashboards	0:35:07	2	0	0:00
2:25:30					0:00

Approximate time for completion 2-3 Hours

Administration Essentials for New Admins

Administration Essentials for New Admins is a thorough introduction to the setup and configuration of the Salesforce application. Using explanation, demonstration, and hands-on exercises, the course guides you through topics that are critical for administrators to understand, such as user management, security and access, customization, and data management. In addition, you will learn how to build reports and dashboards to analyze your company's data and how to automate your company's business processes using workflow rules, assignment rules, and queues.

MODULE	DESCRIPTION
Overview	Take an introductory tour of the Salesforce application. Specifically, you'll learn to find your way around the application and gain an understanding of the different standard objects that are used to store and manage your data.
Getting Your Organization Ready for Users	Learn how to enable and customize a variety of user interface settings for your end users, including list views, tabs, and search. Learn the basics of organization administration, including how to set up your company profile, add multiple currencies, and change the calendar used in Salesforce.
Setting Up and Managing Users	Learn how to configure the Salesforce application to suit your business needs, including how to create custom profiles, custom fields, and page layouts. You'll also learn to manage users and troubleshoot login issues.
Security and Data Access	Walk through the basics of configuring security and access settings in Salesforce. This includes setting up your company's organization-wide defaults, role hierarchy, and sharing model. In addition, explore manual sharing and the use of account and sales teams. You'll also learn how to enter trusted IP ranges and login hours and keep your application both secure and accessible for your users.
Customization: Fields	Learn how to configure the Salesforce application to suit your business needs, including how to administer standard fields and create custom fields and page layouts. In addition, you'll learn how to use record types and business processes, and how to maintain data quality and integrity using validation rules.
Managing Data	Learn the basics of using data utilities, including how to use data import tools like Data Loader to import and export records or update existing data. In addition, you'll learn about the weekly export feature and best practices for storage utilization, as well as mass data transfers.
Reports and Dashboards	Learn the basics of reporting in Salesforce, including how to create standard and custom reports by using different report types and filter criteria. In addition, you'll learn about creating custom summary formulas, using dashboards to display your results, and enhancing reports with charts and highlighting.

MODULE	DESCRIPTION
Automation	Learn the fundamentals of setting up Salesforce workflow to automate the business processes that are common for your organization. You'll learn how to configure and set up workflow rules and actions, including automated tasks, field updates and email alerts. In addition, you'll learn to set up assignment rules and queues, and how to enable and use auto-response rules and Web-to-Lead to enter information into Salesforce.

Administration Essentials for the Service Cloud

MODULE	DESCRIPTION
Administration Essentials for the Service Cloud	Take your administration skills into the Service Cloud! Learn how to customize the Service Cloud to meet the service and support needs of your company and end users. Watch a support agent demonstrate a case management process and an administrator create solution categories, enable web-to-case, and configure the Service Cloud console. Get your own hands-on experience with Service Cloud automation by creating a support process, agent queues, a case assignment rule, and a case escalation rule.

Other Resources

Analyze Your Data with Reports

MODULE	DESCRIPTION
Analyze Your Data with Reports	Explore how you can use Salesforce reports to analyze your data. Learn how to modify reports to meet your requirements or create custom reports from scratch. Also discover how to add groupings and subtotals, and set up a schedule to email the report.

Getting a Head Start with Chatter

MODULE	DESCRIPTION
Getting a Head Start with Chatter	Get ahead of the curve with Chatter, the Enterprise collaboration tool. This course covers everything from business use cases and visibility to how to enable Chatter and train your users on best practices. Join the conversation today! Mobile? Take this course on an iPad.

Getting Started with Managing Data

MODULE	DESCRIPTION
Getting Started with Managing Data	Learn the basics of using data utilities, including how to use data import tools like Data Loader to import and export records or update existing data. In addition, you'll learn about the weekly export feature and best practices for storage utilization, as well as mass data transfers.

Managing Users and Troubleshooting Login Issues

MODULE	DESCRIPTION
Managing Users and Troubleshooting Login Issues	Learn the key components of a user record. For example, discover how to add users so they can begin leveraging the power of Salesforce. By the end of this course, you will also be able to create new users, deactivate existing users, troubleshoot user login issues, and log in as an end user to troubleshoot data access issues.

Summarize Your Data with Dashboards

MODULE	DESCRIPTION
Summarize Your Data with Dashboards	Bring your reports to life using visual summary tools. Discover how data is summarized on a report and how to use conditional highlighting to make the key information stand out. Learn how to use charts to summarize large amounts of data and how to pick the right chart for the job. Then, learn how to bring it all together with a dashboard displaying summary information from up to twenty reports, all in one place!

Taking the Exam

The exam can be scheduled by registering at webassessor.com or by visiting the site at: <https://www.webassessor.com/wa.do?page=enterCatalog&branding=SALESFORCE&tabs=111>

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- + Marketing Cloud Exams

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- Administrator Exams

Salesforce Certified Administrator (WI16)

The Salesforce Certified Administrator exam is intended for an individual who has experience performing as a Salesforce Administrator. To learn more about the exam, please download the study guide: http://certification.salesforce.com/SG_CertifiedAdministrator.pdf.

Salesforce Certified Administrator (WI16)	Retake Policy :	PR001119	Onsite Proctored	USD 200.00	Register
Salesforce Certified Administrator (WI16)	Retake Policy :	PR001119	Online Proctored	USD 200.00	Register

From the available options, select the appropriate exam to be taken and click on the “Register” button for the **Online Proctored** exam.

Maintaining a Certification

Successful completion of online, release-specific Salesforce Administrator exams is required to maintain this credential. Release exams are published three times a year for each of the Salesforce product releases throughout the year. The initial cost of the certification includes the Salesforce Administrator exam plus two online release exams. In subsequent years, an annual maintenance fee will be charged when registering for every third release exam, to keep the certification current. The maintenance fee includes the three release exams and access to the supporting training material. Salesforce Certified professionals will be notified automatically when new release training material and exams become available