Salesforce Admin Exam Study Guide: Configuration and Setup (20%)

Salesforce Basics: For Complete Beginners

If Salesforce is a complete unknown to you, don't stress—here's a huge, welcoming intro to get you excited, comfortable, and ready to dive in headfirst.

- **What is Salesforce?**
    - It's an online platform that businesses use to manage everything they care about—customer details, sales opportunities, team tasks—all in one slick, cloud-based spot, no need for complicated software or tech wizardry.
    - Picture it as your business's personal superhero sidekick, like a magical organizer who keeps everything in order, finds what you need instantly, and helps your team shine without breaking a sweat.

- **Why It's a Total Game-Changer**:
    - It rescues you from chaos—like digging through messy spreadsheets, chasing emails, or juggling sticky notes—and puts customer info, sales progress, and work jobs in one crystal-clear hub. Whether your team's selling products, solving customer problems, or planning big moves, it's like a teamwork turbo-booster that saves time, cuts out repetition, and keeps everyone on the same page.
    - As an admin, you're the genius who shapes it to fit your team—like teaching a super-smart robot your company's exact way of doing things, making it work perfectly for everyone from the newbie rep to the big-shot manager.

- **Key Words to Start With**:
    - **Org**: Your company's own Salesforce world—like your team's private clubhouse where all the data lives and the action happens.
    - **Setup**: The control center (top-right gear icon on the screen) where you tweak things—like the cockpit of your Salesforce spaceship, giving you the power to steer and adjust everything.
    - **CRM**: Customer Relationship Management—just a fancy way of saying Salesforce is all about keeping customers happy, organized, and at the core of your business.

- **What This Topic Is All About**:

- This section is your foundation—it's about setting up Salesforce to match your company's needs, from picking the right settings to customizing how it looks and works. It's like building the base of your Salesforce house before you move in the furniture (users, data, etc.).

Let's dive in with a beginner's curiosity and build this up step-by-step!

Overview

"Configuration and Setup" is the backbone of your Salesforce org—it's where you lay the groundwork by configuring company settings, customizing the platform, and making sure it's ready for your team to use. You'll learn to set up basics like company info, tweak the interface with apps and tabs, and use tools like Lightning App Builder to make it your own. It's 20% of the exam—the biggest chunk—because it's the starting point for everything else.

Exam Weight

- **Percentage**: 20%

- **Why It Matters**: This is the foundation—if your org isn't set up right, nothing else (users, data, automation) works properly. With 20%, it's a huge part of your test score and the first big skill you'll flex as an admin.

Objectives (In Super-Simple Terms)

- Learn how to set up basic company info—like your business name and time zone—so Salesforce knows who you are.

- Figure out how to customize what users see—like apps, tabs, and pages—so it's easy for them to work.

- Get comfy with tools like Lightning App Builder—like dragging and dropping blocks—to make Salesforce look and feel right.

- Understand how to tweak settings—like languages or currencies—so it fits your team's needs perfectly.

Structure of the Study Guide

- **Definitions**: Big, clear explanations of key terms.

- **Categories**: Topics split into easy-to-digest pieces.

- **Bullet Points**: Massive, beginner-friendly summaries with tons of detail.

- **Tables**: Side-by-side comparisons to keep it simple.

- **Practical Scenarios**: Real-world examples you can picture doing.

- **Study Tips**: Step-by-step ways to master this.

Definitions (Huge Summaries with Tons of Beginner Details)

- **Company Profile**:

    o **What It Is**: The basic info about your business in Salesforce—like your name, address, and time zone.

    o **Details**: Think of it as your org's ID card—it tells Salesforce who you are and how you operate. You set stuff like your company name, logo, default language, and currency here. It's like filling out a "Welcome to Our Business" form so Salesforce knows the basics before you start adding users or data.

- **Lightning Experience**:

    o **What It Is**: The modern, flashy version of Salesforce—like a shiny new interface—compared to the older "Classic" look.

    o **Details**: This is your user-friendly workspace—like upgrading from an old flip phone to a sleek smartphone. It's got a clean design, cool features like drag-and-drop customization, and a focus on making work faster and prettier. You'll configure it to match your team's vibe.

- **App**:

    o **What It Is**: A collection of tabs and tools in Salesforce—like "Sales" or "Service"—that users see when they log in.

    o **Details**: Imagine it as a toolbox—each app bundles tabs (like "Accounts" or "Opportunities") and features for a specific job, like selling or support. You set up apps to give users what they need without clutter—like a "Sales" app for reps with just sales stuff.

- **Tab**:

    o **What It Is**: A clickable link in Salesforce—like "Contacts" or "Reports"—that takes you to a specific type of data or tool.

- **Details**: These are like bookmarks—they show up in an app's navigation bar and let users jump to stuff like customer lists or dashboards. You decide which tabs show up where, like picking what goes on your desk for quick access.

- **Lightning App Builder**:

  - **What It Is**: A drag-and-drop tool to customize pages in Salesforce—like rearranging a room.

  - **Details**: This is your design playground—you use it to build or tweak pages (like the Account page) by dragging components (like fields or charts) onto a layout. It's like playing with Lego blocks to make Salesforce look exactly how you want, no coding needed.

- **Fiscal Year**:

  - **What It Is**: How Salesforce tracks your company's financial calendar—like when your year starts.

  - **Details**: This is your money timeline—like telling Salesforce, "Our year starts in April, not January." It affects reports and forecasts, so you set it to match your business's rhythm, whether it's standard (Jan-Dec) or custom (e.g., Apr-Mar).

- **Multi-Currency**:

  - **What It Is**: A setting to let Salesforce handle money in different currencies—like dollars and euros.

  - **Details**: Think of it as your global wallet—if your team works across countries, this lets you track deals in local currencies (e.g., USD, GBP) and convert them automatically. It's like having a built-in currency exchanger for sales and reports.

Categories

- **Configuration Tools**: The big areas you'll tweak to set up your org.

  - Company Settings (Profile, Fiscal Year, Currency)

  - Apps and Tabs

  - Lightning App Builder and Page Customization

Detailed Breakdown (Bullet Points with Massive Beginner Summaries)

1. Configuration Tools

- **Company Settings**

    - **Summary**: The core settings that define your business in Salesforce—like your name, time zone, fiscal year, and currency—so it's tailored to how you operate.

    - **Details**:

        - This is your org's DNA—it's where you tell Salesforce the essentials about your company so everything else (users, data, reports) lines up right. You'll set up stuff like your business name, address, default settings, and how you track time and money. It's like setting up your phone with your name, location, and preferences before you start texting.

        - **How You Set It Up**: Go to Setup (gear icon) > "Company Settings" section. Here's the step-by-step:

            - **Company Information**:

                - **What It Does**: Sets your org's identity—like "Acme Corp," address, and logo.

                - **Details**: Find it at Setup > Company Settings > Company Information. Fill in:

                    - **Organization Name**: Like "Acme Corp"—shows on emails and pages.

                    - **Address**: Your HQ—like "123 Main St, Chicago, IL"—for records and taxes.

                    - **Default Time Zone**: Like "(GMT-05:00) Central Time"—so dates/times match your clocks.

                    - **Default Locale**: Like "United States"—affects date formats (MM/DD/YYYY) and numbers (1,234.56).

- **Default Language**: Like "English"—what users see by default (they can change it later).

- **Logo**: Upload a pic—like "AcmeLogo.png"—to brand your org (shows in Lightning).

- **Why It's Cool**: It's your org's "Hello, world!"—makes it feel like home. For example, set "Default Time Zone" to "Pacific Time" for a Cali team so meeting times aren't off.

- **Example**: You're at "GrowEasy Inc." in New York—set Name = "GrowEasy Inc.," Time Zone = "Eastern Time," Locale = "United States," upload your green leaf logo— now it's your org.

- **Fiscal Year**:

  - **What It Does**: Defines your financial calendar—like starting in July instead of January.

  - **Details**: Setup > Company Settings > Fiscal Year. Pick:

    - **Standard**: Jan 1-Dec 31—easy, default for most.

    - **Custom**: Like Apr 1-Mar 31—matches your business cycle. Set the start month (e.g., "July") and year naming (e.g., "FY 2025" for July 2024- June 2025).

  - **Why It's Cool**: Aligns reports and forecasts—like if your sales goal resets in April, Salesforce tracks it right. Can't change mid-year without planning, so set it early.

  - **Example**: Your retail biz starts its year in Feb for post- holiday planning—set Custom Fiscal Year to "February," name it "FY 2025" (Feb 2025-Jan 2026)—sales reports now match.

- **Currency Settings**:

  - **What It Does**: Manages money types—like dollars, euros, or yen.

  - **Details**: Setup > Company Settings > Currency:

- **Single Currency**: Pick one—like "USD - US Dollar"—if you're all local.

- **Multi-Currency**: Enable it (Setup > Company Settings > Manage Currencies) to add more—like "EUR - Euro" or "GBP - British Pound." Set exchange rates (e.g., 1 USD = 0.85 EUR) and a "Corporate Currency" (like USD) for totals.

  - **Why It's Cool**: Handles global teams—like a UK rep logs a £10,000 deal, and Salesforce converts it to $12,000 USD for reports. Rates update manually or via admin tweaks.

  - **Example**: Your US-based tech firm sells in Europe— enable Multi-Currency, set Corporate = "USD," add "EUR" with rate 1 USD = 0.90 EUR—deals in euros show right in dollars too.

- **Why It's Great**: These settings are your org's heartbeat—everything from dates in emails to sales totals depends on them. Get them right, and your team's off to a smooth start.

- **What's Tricky**: Some settings (like Fiscal Year) are hard to change later—plan ahead. Multi-Currency needs enabling by Salesforce support first (not instant). Test how locales affect dates/numbers— like "1,234" vs. "1.234" in Europe.

- **Real-Life Example**: You're "Sunny Farms" in Texas—set Name = "Sunny Farms," Time Zone = "Central Time," Fiscal Year = "January" (standard), Currency = "USD," upload your sun logo—your org's ready to grow.

- **Apps and Tabs**

  - **Summary**: Tools to customize what users see when they log in—like creating "Sales" or "Support" apps with specific tabs—so they get the right tools for their job.

  - **Details**:

    - This is your user menu planner—like picking what's on the buffet for each team. Apps bundle tabs (links to data like "Accounts" or

"Reports") into a workspace, and tabs decide what's clickable. You set these up so a sales rep sees sales stuff, not support clutter, and everyone finds their tools fast.

- **How You Set It Up**: Go to Setup > Apps section. Here's the mega-breakdown:

    - **App Manager**:

        - **What It Does**: Create or edit apps—like "Sales" or a custom "Marketing" app.

        - **Details**: Setup > Apps > App Manager:

            - **New Lightning App**: Click "New Lightning App":

                - **Name**: Like "Sales Team"—shows in the app launcher (9-dot icon).

                - **Description**: Like "For sales reps"—helps you remember.

                - **Logo**: Upload an icon—like a dollar sign—for the launcher.

                - **Tabs**: Pick what's in it—like "Home," "Accounts," "Opportunities," "Reports." Drag them in order (e.g., "Home" first).

                - **Assign Profiles**: Choose who sees it—like "Sales Rep" profile—so only they get it in their launcher.

            - **Edit Existing**: Tweak defaults—like add "Dashboards" to the "Sales" app or reorder tabs.

        - **Why It's Cool**: Tailors the experience—like a sales rep opens Salesforce, picks "Sales Team" app, and sees only sales tabs—no distractions.

        - **Example**: Make a "Support Crew" app—Name = "Support Crew," Tabs = "Home, Cases, Contacts, Reports," assign to "Support Agent" profile—support team's ready.

- **Tabs**:
  - **What It Does**: Add or tweak clickable links—like "Leads" or a custom "Orders__c" tab.
  - **Details**: Setup > Objects and Fields > Object Manager > [Object] > Edit:
    - **Standard Tabs**: Like "Accounts" or "Contacts"—already there, just show/hide per app.
    - **Custom Tabs**: For custom objects—like "Orders__c":
      - Go to Object Manager > "Orders__c" > "Tab Settings" > "Create Tab."
      - Pick a style (e.g., truck icon), name it "Orders," add to apps (e.g., "Sales Team").
    - **Tab Visibility**: Setup > Apps > App Manager > Edit App > "Navigation Items"—add/remove tabs or set "Default" (shows on login).
  - **Why It's Cool**: Keeps navigation simple—like a rep clicks "Orders" and jumps to their custom order list, no hunting needed.
  - **Example**: You've got a custom "Projects__c" object—create a "Projects" tab, add it to a "Project Team" app—team sees it right away.
- **Why It's Great**: It's like curating a playlist—each team gets their hits. A "Sales" app with "Opportunities" and "Leads" tabs keeps reps focused, while a "Service" app with "Cases" suits agents.
- **What's Tricky**: Too many apps confuse users—keep it lean (e.g., 3-5 apps max). Tab order matters—put "Home" first for flow. Profiles control who sees what—test it so reps don't miss their app.
- **Real-Life Example**: Your sales team needs focus—create a "Sales Pros" app with "Home, Leads, Opportunities, Reports" tabs, assign to "Sales Rep" profile—they log in, pick it, and go.

- **Lightning App Builder and Page Customization**
  - o **Summary**: A drag-and-drop tool to design pages—like the Account page—so users see what they need in a way that works for them.
  - o **Details**:
    - This is your interior designer—like rearranging a room to make it cozy and functional. Lightning App Builder lets you tweak pages (e.g., Home, Account, custom objects) by dragging components—like fields, charts, or buttons—onto a layout. It's how you make Salesforce pretty and practical without needing a coder's brain.
    - **How You Set It Up**: Go to Setup > User Interface > Lightning App Builder. Here's the full scoop:
      - **Create/Edit a Page**:
        - **What It Does**: Build pages—like a custom Home or Account layout.
        - **Details**: Setup > Lightning App Builder > "New" or "Edit":
          - **New Page**: Pick a type:
            - **App Page**: Standalone—like a "Team Hub" page with news and stats.
            - **Home Page**: What users see on "Home" tab—like a welcome mat.
            - **Record Page**: For objects—like "Account" or "Orders__c"—shows record details.
          - **Name It**: Like "Sales Home" or "Account Enhanced."
          - **Template**: Choose a layout—like "One Column" (simple) or "Header and Two Columns" (fancy).
          - **Components**: Drag from the left:
            - **Standard**: Like "Record Detail" (shows fields), "Related List" (e.g., Contacts

under Account), "Tabs" (organizes sections).

- **Custom**: Like a "Recent Items" list or third-party widgets (if installed).

- **Fields**: Drag specific fields—like "Account Name" or "Amount"—to rearrange.

- **Customize**: Click components to tweak—like set "Tabs" to show "Details" and "Activity," or filter "Related List" to "Open Opportunities."

- **Assign It**: Save, then "Activation":

  - **Org Default**: Everyone sees it—like new Account page for all.

  - **App/Profile**: Specific users—like "Sales" app or "Manager" profile.

- **Why It's Cool**: Makes pages yours—like a rep's Account page has a big "Phone" field and "Open Deals" list, no clutter.

- **Example**: Build a "Sales Home" page—One Column, drag "Recent Opportunities," "Chatter Feed," "Key Metrics" (custom report)—assign to "Sales Pros" app—reps love it.

- **Page Layouts (Classic Option)**:

  - **What It Does**: Older way to set fields/buttons—still used in some spots.

  - **Details**: Setup > Object Manager > [Object] > Page Layouts:

    - Edit layout—like "Account Layout"—drag fields (e.g., "Industry"), buttons (e.g., "New"), related lists (e.g., "Opportunities").

    - Assign to profiles—like "Sales Rep" gets a slim layout, "Manager" gets full.

- **Why It's Cool**: Quick for Classic users—like tweaking a form—but Lightning App Builder's the future.

- **Example**: Edit "Contact Layout"—add "Mobile Phone" field, "Related Cases" list—assign to "Support Agent" profile.

- **Why It's Great**: It's like decorating—drag, drop, done. A sales rep's Opportunity page might show "Amount" big, with a "Recent Notes" section—keeps them focused and happy.

- **What's Tricky**: Too many components slow pages—keep it lean (e.g., 5-7 max). Test per profile—reps might see less than managers. Lightning vs. Classic needs checking—some users might still use Classic.

- **Real-Life Example**: Your support team wants a better Case page— use Lightning App Builder, pick "Record Page," "Case," drag "Record Detail" (fields like "Case Number"), "Related List" (e.g., "Attachments"), "Chatter"—assign as Org Default—cases now pop.

Tables

Table 1: Company Settings Breakdown

Setting	What It Controls	Example
Company Info	Name, logo, time zone	"Acme Inc., Eastern Time"
Fiscal Year	Financial calendar	"Apr-Mar, FY 2025"
Currency	Money types and rates	"USD + EUR, 1 USD = 0.85 EUR"

Table 2: Apps vs. Tabs

What's Different	Apps	Tabs
What It Is	Bundle of tabs/tools	Single clickable link
Purpose	User workspace	Data/tool access
Examples	"Sales Team" app	"Leads" tab

What's Different	Apps	Tabs
Where Set	App Manager	Object Manager/App Manager

Table 3: Lightning App Builder vs. Page Layouts

What's Different	Lightning App Builder	Page Layouts
How It Works	Drag-and-drop, modern	Drag fields, Classic
Where Used	Lightning pages (Home, Record)	Classic pages
Flexibility	High—charts, custom components	Medium—fields, buttons
Example	Custom "Case" page with tabs	"Contact" layout with fields

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Practical Scenarios

1. **Set Up Company Info**:

   o **Need**: Brand your org for "TechTrendz" in Seattle.

   o **Solution**: Setup > Company Information, set Name = "TechTrendz," Address = "456 Pine St, Seattle, WA," Time Zone = "Pacific Time," upload tech logo—org's branded.

2. **Create a Sales App**:

   o **Need**: Sales team needs their own workspace.

   o **Solution**: Setup > App Manager > New Lightning App, Name = "Sales Hub," Tabs = "Home, Leads, Opportunities, Dashboards," assign to "Sales Rep" profile—reps get their tools.

3. **Add a Custom Tab**:

   o **Need**: Show "Projects__c" object in navigation.

   o **Solution**: Setup > Object Manager > "Projects__c" > Create Tab, Name = "Projects," add to "Sales Hub" app—team clicks "Projects" to see project list.

4. **Customize Account Page**:

   o **Need**: Sales reps want key Account info first.

- **Solution**: Setup > Lightning App Builder > New Record Page, "Account," drag "Record Detail" (fields like "Name," "Phone"), "Related List" ("Opportunities"), assign as Org Default—Account page shines.

5. **Set Multi-Currency**:

   - **Need**: Track deals in USD and CAD.

   - **Solution**: Setup > Manage Currencies > Enable Multi-Currency, Corporate = "USD," add "CAD" (1 USD = 1.35 CAD)—deals convert seamlessly.

Study Tips

- **Hands-On**: Get a free org (developer.salesforce.com)—set Company Info, make an app with tabs, build a Home page in Lightning App Builder.

- **Start Simple**: Trailhead's "Salesforce Platform Basics" and "Lightning Experience Customization"—free, with videos and tasks.

- **Focus**: Know Company Info (time, currency), Apps/Tabs (user view), Lightning App Builder (page design).

- **Practice**: Try questions—"Set a fiscal year for July?" or "Make a Sales app?"—exam-style drills.

- **Beginner Boost**: Watch "Salesforce Setup for Beginners" on YouTube; tweak one setting daily—like logo, then app, then page.

- **Time**: Spend 20% here—10 hours of 50—split: 4 on Company Settings, 3 on Apps/Tabs, 3 on Lightning App Builder.