Salesforce Admin Exam Study Guide: Data Management (15%)

Salesforce Basics: For Complete Beginners

If Salesforce is brand new to you, don't panic—here's a big, friendly intro to get you excited and ready to roll.

- **What is Salesforce?**
  - It's an online tool that businesses use to keep track of everything important—customers, sales, tasks—all in one simple place, no complicated software to wrestle with.
  - Picture it as your business's super-organized assistant, like a magical filing cabinet that knows where everything is and helps you find it fast.

- **Why It's Amazing**:
  - It cuts out the chaos—like digging through messy spreadsheets or chasing people for updates—and keeps customer info, sales deals, and team jobs in one neat spot. Whether your team's selling products or fixing issues, it's like a teamwork turbocharger that saves time and keeps everyone on the same page.
  - As an admin, you're the wizard who makes it work for your team—like teaching a smart robot your company's unique way of doing things.

- **Key Words to Know Before You Start**:
  - **Org**: Your company's own Salesforce space—like your team's private headquarters where all the action happens.
  - **Setup**: The control zone (top-right gear icon on the screen) where you tweak things—like the dashboard of your Salesforce car.
  - **CRM**: Customer Relationship Management—fancy way of saying Salesforce helps you take care of customers and keep them happy.

- **What This Topic Is All About**:
  - This section is your guide to managing data in Salesforce—getting it in, keeping it clean, moving it around, and making sure it's safe. It's like learning to be the librarian of your company's info.

Let's jump in with a beginner's enthusiasm and unpack this step-by-step!

Overview

"Data Management" is all about handling the info that lives in Salesforce—how to bring it in, keep it neat and accurate, move it out when needed, and protect it from messes or mistakes. You'll learn tools to import data, clean it up, back it up, and control who sees what. It's 15% of the exam—a solid piece of the puzzle that's key to being a great admin.

Exam Weight

- **Percentage**: 15%

- **Why It Matters**: Data is the lifeblood of Salesforce—if it's messy or missing, everything falls apart. With 15%, this is a big deal for your test score and your admin skills.

Objectives (In Super-Easy Terms)

- Learn how to bring data into Salesforce—like adding customer lists—and make sure it goes to the right spots.

- Figure out ways to keep data clean—like fixing duplicates or filling in blanks—so it's useful and trustworthy.

- Understand how to back up data and move it out—like saving a copy or sending it somewhere else—so nothing gets lost.

- Get the hang of controlling who sees or changes data—like locking private stuff—so it stays safe and secure.

Structure of the Study Guide

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

- **Categories**: Topics broken into bite-sized chunks.

- **Bullet Points**: Long, beginner-friendly summaries with heaps of detail.

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

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

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

Definitions (Big Summaries with Tons of Beginner Details)

- **Data Import**:

  - **What It Is**: Bringing info—like customer names or sales records—into Salesforce from outside.

  - **Details**: Think of it as moving a pile of papers into your Salesforce filing cabinet. You might have a spreadsheet with customer contacts, and data import is how you get those into Salesforce so your team can use them. It's like unpacking boxes into a new house—you want everything in the right drawers (objects) and labeled right (fields).

- **Data Export**:

  - **What It Is**: Taking info out of Salesforce—like saving a copy or sending it somewhere else.

  - **Details**: This is like making a backup of your filing cabinet or sharing some files with another team. You might export all your Accounts to save them offline or send them to another system. It's your way to keep data safe or move it around when needed.

- **Data Loader**:

  - **What It Is**: A tool to import, export, update, or delete lots of data in Salesforce.

  - **Details**: Imagine it as a big truck that hauls data in and out. It's more powerful than the simple import wizards in Setup—it can handle thousands of records at once, update existing stuff, or even delete things in bulk. You'll use it on your computer, not just in the browser, and it's perfect for big jobs.

- **Duplicate Management**:

  - **What It Is**: Tools to stop or fix repeat records—like two entries for the same customer.

  - **Details**: This is like cleaning up your contacts list so you don't have "John Smith" listed twice by mistake. Salesforce can warn you when you're adding a duplicate or help you merge them, keeping your data neat and avoiding confusion.

- **Data Security**:

- **What It Is**: Controlling who can see or change data in Salesforce—like locking private info.

- **Details**: Think of it as putting locks on certain drawers in your filing cabinet. You decide who gets a key—like only managers seeing salaries—and make sure sensitive stuff stays safe from prying eyes or accidental changes.

Categories

- **Data Management Tools**: How you get data in, out, and cleaned up.

  - Data Import Wizard

  - Data Loader

  - Duplicate Management

  - Data Export and Backup

  - Data Security (Field-Level Security)

Detailed Breakdown (Bullet Points with Massive Beginner Summaries)

1. Data Management Tools

- **Data Import Wizard**

  - **Summary**: A simple, built-in tool in Salesforce to bring in data—like customer lists or sales records—from spreadsheets.

  - **Details**:

    - This is your beginner-friendly way to move data into Salesforce—like a friendly helper who walks you through it. Say you've got a spreadsheet with 500 customer names and phone numbers—you can use this wizard to get them into Accounts or Contacts without needing to be a tech whiz.

    - **How You Set It Up**: Go to Setup > Data Import Wizard (under "Data"). Here's the step-by-step:

- **Pick What You're Importing**: Choose an object—like Accounts, Contacts, or Leads. It only works with certain standard objects or custom ones you've set up for it.

- **Upload Your File**: Grab a CSV file (that's a spreadsheet saved as "comma-separated values"—like "Name,Phone,Email" in rows). You can make this in Excel and save it as CSV.

- **Match Fields**: Tell Salesforce where your data goes—like "Column A: Name" maps to the "Account Name" field, and "Column B: Phone" goes to "Phone." It's like labeling boxes so they end up in the right rooms.

- **Run It**: Hit "Import," and it adds the records—or updates them if you're matching existing ones (like by email or ID).

- **Why It's Great**: It's super easy—like following a recipe. It can handle up to 50,000 records at a time, and it's got built-in checks—like spotting duplicates if you've turned that on. For example, if you're importing Leads from a trade show list, it'll add them to the Leads object and warn you if "Jane Doe" is already there.

- **What's Tricky**: It's limited—it only works with certain objects (not all custom ones), and it can't delete or do fancy updates. It's also slower for huge batches compared to Data Loader.

- **Real-Life Example**: Your marketing team hands you a spreadsheet with 200 new Leads from an event. You use the Data Import Wizard, upload the CSV, map "Name" to "Lead Name" and "Company" to "Company," and boom—200 Leads are in Salesforce, ready for sales to call.

- **Another Example**: You've got a list of 300 updated Account phone numbers. Import Wizard matches them by "Account Name," updates the "Phone" field, and skips any duplicates it finds.

- **Data Loader**

  - **Summary**: A powerful tool you install on your computer to import, export, update, or delete lots of data in Salesforce—way more flexible than the wizard.

  - **Details**:

- This is your heavy-duty data hauler—like a moving truck compared to the wizard's bicycle. It can bring in thousands of records, update existing ones, pull data out, or even delete stuff in bulk. Say you need to add 100,000 Contacts, update 50,000 Accounts, or export everything for a backup—Data Loader's your go-to.

- **How You Set It Up**: You download it from Setup > Data Loader (look for the download link), install it on your computer, and log in with your Salesforce credentials. Here's how it works:

  - **Import**: Pick "Insert" to add new records—like uploading a CSV with 10,000 Leads. Map fields (e.g., "Email" to "Email"), and run it.

  - **Update**: Choose "Update" to change existing records—like fixing 5,000 Account addresses. Use a unique ID (like "Salesforce ID" or "Email") to match them, then map new values (e.g., "Street" to "Billing Street").

  - **Upsert**: A mix of insert and update—if a record exists (by ID or key), it updates; if not, it adds it. Great for syncing data.

  - **Export**: Pick "Export" to pull data out—like all Contacts into a CSV. Choose fields (e.g., "Name, Phone") and save it.

  - **Delete**: Select "Delete" to remove records—like wiping 2,000 old Leads. Match by ID and confirm they're gone.

- **Why It's Great**: It's a powerhouse—it can handle up to 5 million records, works with any object (standard or custom), and does more than just import (like delete or export). For example, you could import 20,000 custom "Order__c" records, then export them later for analysis—all in one tool.

- **What's Tricky**: It's not as newbie-friendly—you need to install it, know your Salesforce IDs (unique codes for records), and be comfy with CSVs. It's like driving a manual car—takes practice but gives you control.

- **Real-Life Example**: Your company switches systems and gives you a CSV with 50,000 Contacts. You use Data Loader to "Insert" them into Contacts, mapping "FirstName" to "First Name" and "LastName" to "Last Name"—done in minutes.

- **Another Example**: You need to update 10,000 Accounts with new regions. Export their IDs and old data with Data Loader, edit the CSV in Excel (add "Region" column), then "Update" via Data Loader—bam, all fixed.

- **Duplicate Management**

  - **Summary**: Tools in Salesforce to stop or fix duplicate records—like two "John Smiths" for the same person—so your data stays clean.

  - **Details**:

    - This is your cleanup crew—like a librarian making sure there's only one book per title on the shelf. Duplicates happen—like when two reps add the same Lead—or mess up reports—like counting "Jane Doe" twice. Salesforce helps you catch them before they're added or merge them if they sneak in.

    - **How You Set It Up**: Go to Setup > Duplicate Rules and Matching Rules. Here's the breakdown:

      - **Matching Rules**: Define what makes a duplicate—like "Email matches exactly" or "Name and Phone are close." You set these up first—like telling Salesforce, "If these fields look the same, it's a dupe."

      - **Duplicate Rules**: Decide what to do—like "Block" (stop the duplicate from saving) or "Alert" (warn the user but let them save). You tie these to Matching Rules and pick objects (e.g., Leads, Contacts).

      - **Merge Duplicates**: If dupes get in, go to an object (e.g., Accounts), find "Potential Duplicates," and merge them—keeping the best data (e.g., newest phone number).

    - **Why It's Great**: It keeps your data trustworthy—like avoiding two "John Smiths" with different phones confusing everyone. For example, a rep tries to add a Lead with "jdoe@email.com," and Salesforce pops up, "Hey, that's already here!"—saving the day.

    - **What's Tricky**: You need to tweak rules to fit—like deciding if "John Smith" and "Jon Smith" are the same (fuzzy matching helps). Merging takes care—you pick which record "wins" if fields differ.

- **Real-Life Example**: A sales rep adds a Contact "Jane Doe, jane@email.com," but Duplicate Rules block it because "jane@email.com" is already in Contacts—rep sees "Duplicate Alert" and checks instead of doubling up.

- **Another Example**: You spot two Accounts—"ABC Inc." and "ABC Incorporated"—with similar addresses. Matching Rules flag them, you merge them in Accounts, keeping the latest "Phone" and "Owner," so it's one clean record.

- **Data Export and Backup**

  - **Summary**: Tools to pull data out of Salesforce—like saving a copy or sharing it—so you don't lose it and can use it elsewhere.

  - **Details**:

    - This is your safety net—like making a backup of your phone or sending files to a friend. Salesforce holds your data, but you might need it offline (for emergencies) or in another system (like analytics). These tools let you grab everything and store it safely.

    - **How You Set It Up**: Two main ways:

      - **Data Export Service**: Go to Setup > Data Export (under "Data"). Here's how:

        - **Schedule It**: Pick "Export Now" or set a weekly/monthly run (e.g., every Saturday at midnight).

        - **Choose Data**: Select objects—like Accounts, Contacts, or everything (includes attachments like files).

        - **Get Files**: Salesforce emails you a link to download ZIP files with CSVs—like "Accounts.csv" with all fields.

      - **Data Loader**: Use the installed tool (see above):

        - Pick "Export," choose an object (e.g., Opportunities), select fields (e.g., "Name, Amount"), and save as CSV.

        - Can export specific records with filters—like "Opportunities Closed This Year."

- **Why It's Great**: It's your insurance—if Salesforce crashes (rare!) or you need data elsewhere, you've got it. For example, export all Contacts weekly to a secure drive, or pull Opportunities for a report in Excel—it's peace of mind and flexibility.

- **What's Tricky**: Data Export Service takes time (hours for big orgs) and needs admin access. Data Loader's faster but manual—you pick what to export each time. CSVs don't include fancy formatting, just raw data.

- **Real-Life Example**: Your boss says, "Back up everything!" You use Data Export Service, schedule a weekly Saturday export, and get ZIPs with all Accounts, Contacts, and Cases—saved to a company drive.

- **Another Example**: You need all "Closed Won" Opportunities for a report. Use Data Loader, export Opportunities with "Stage = Closed Won," and get a CSV to analyze in Excel.

- **Data Security (Field-Level Security)**

  - **Summary**: Controls who can see or change specific fields in Salesforce—like hiding salaries or locking addresses—so data stays safe.

  - **Details**:

    - This is your lock-and-key system—like deciding who gets into certain rooms in your house. Not everyone should see or edit everything—like sales reps don't need "Employee Salary" but need "Customer Phone." Field-Level Security (FLS) lets you set those rules field-by-field.

    - **How You Set It Up**: Go to Setup > Object Manager > [Object] (e.g., Account) > Fields & Relationships. Here's the process:

      - **Pick a Field**: Click a field—like "Annual Revenue."

      - **Set Security**: Click "View Field Accessibility" or "Set Field-Level Security":

        - **Visible**: Check this if a profile (like "Sales Rep") can see it.

        - **Read-Only**: Uncheck "Edit" if they can see but not change it.

- **Hidden**: Uncheck "Visible" if they can't see it at all—like "Salary" for non-managers.

    - **Apply to Profiles**: Set this for each user type—like "Sales Reps" see "Phone" but not "Revenue," while "Managers" see both.

- **Why It's Great**: It's like a privacy shield—keeps sensitive data safe and stops accidental changes. For example, a rep sees "Account Name" and "Phone" but not "Billing Info," while accounting sees it all—everyone gets what they need, nothing more.

- **What's Tricky**: It's per-field, so you need to check every object and field—it's detailed work. It also layers with other security (like profiles and roles), so you need to test what users actually see.

- **Real-Life Example**: You set "Annual Revenue" on Accounts to "Hidden" for "Sales Rep" profile but "Visible" for "Manager"—reps see basic info, managers see financials, and no one messes up the numbers.

- **Another Example**: On a custom "Employee__c" object, "Salary" is "Read-Only" for HR and "Hidden" for everyone else—HR can view but not edit, others don't even know it's there.

Tables

Table 1: Data Import Wizard vs. Data Loader

What's Different	Data Import Wizard	Data Loader
What It Does	Import/update (limited objects)	Import, update, export, delete
How Easy?	Super simple—browser-based	Takes practice—install needed
Record Limit	Up to 50,000	Up to 5 million
Objects	Standard + some custom	All objects
Examples	Add 200 Leads	Update 50,000 Accounts

Table 2: Data Export vs. Data Security

What's Different Data Export		Data Security (FLS)
Goal	Save/move data out	Control who sees/edits
Tools	Export Service, Data Loader	Field settings in Setup
When Used?	Backup or transfer	Daily access control
Examples	Weekly backup of Contacts	Hide "Salary" from reps
Focus	Data movement	Data protection

Practical Scenarios

1. **New Customer List**:

   o **Need**: Import 1,000 new Accounts from a trade show.

   o **Solution**: Data Import Wizard—Setup > Data Import Wizard, pick Accounts, upload CSV (Name, Phone), map fields, import—1,000 Accounts ready.

2. **Update Addresses**:

   o **Need**: Update 5,000 Contact addresses from a new list.

   o **Solution**: Data Loader—Export Contact IDs, edit CSV with new addresses, "Update" with ID matching, 5,000 Contacts refreshed.

3. **Clean Duplicates**:

   o **Need**: Stop duplicate Leads with same email.

   o **Solution**: Setup > Duplicate Rules, set Matching Rule "Email exact match," Duplicate Rule "Block" on Leads—reps get "Duplicate!" alerts.

4. **Weekly Backup**:

   o **Need**: Save all data weekly.

   o **Solution**: Data Export Service—Setup > Data Export, schedule Saturday exports, download ZIPs with Accounts, Contacts, etc.

5. **Hide Sensitive Fields**:

   o **Need**: Reps see "Phone" but not "Revenue" on Accounts.

- o **Solution**: Setup > Object Manager > Account > Fields, set "Annual Revenue" to "Hidden" for "Sales Rep" profile, "Visible" for "Manager."

Study Tips

- **Hands-On**: Get a free org (developer.salesforce.com)—import a small CSV with Data Import Wizard, then try Data Loader for an update.

- **Start Simple**: Trailhead's "Data Management" module—free, with videos and practice imports.

- **Focus**: Know Import Wizard (easy imports), Data Loader (big jobs), Duplicate Rules (clean data), Export (backups), FLS (security).

- **Practice**: Try questions like "Which tool for 100,000 records?" or "Hide a field for reps"—exam-style drills.

- **Beginner Boost**: Watch "Salesforce Data Management Basics" on YouTube; do one task daily (e.g., import, then export).

- **Time**: Spend 15% here—7-8 hours of 50—split across tools, with extra on Data Loader and Flow.