

Salesforce Admin Exam Study Guide - Standard and Custom Objects (Weight TBD)

Salesforce Basics: For Complete Beginners

If Salesforce is a total mystery to you, no worries—here’s a colossal, welcoming intro to get you excited, confident, and ready to jump in.

- **What is Salesforce?**
 - It’s an online platform that businesses use to manage everything that matters—customer info, sales deals, team tasks—all in one sleek, cloud-based spot, no need for tech headaches or clunky software installs.
 - Picture it as your business’s personal genius, like a magical toolbox that organizes your data, tracks your work, and helps your team shine without breaking a sweat.
- **Why It’s a Total Game-Changer:**
 - It saves you from madness—like sifting through piles of papers, chasing updates, or juggling spreadsheets—and puts customer details, sales progress, and work jobs in one tidy hub. Whether your team’s closing deals, supporting clients, or managing projects, it’s like a teamwork turbocharger that cuts chaos, saves time, and keeps everyone in sync.
 - As an admin, you’re the architect—building and tweaking the system to fit your company perfectly, like teaching a super-smart assistant your team’s unique way of doing things.
- **Key Words to Kick Things Off:**
 - **Org:** Your company’s own Salesforce world—like your team’s private headquarters where all the data lives and the magic unfolds.
 - **Setup:** The control center (top-right gear icon) where you tweak stuff—like the blueprint room of your Salesforce castle, letting you design and adjust everything.
 - **CRM:** Customer Relationship Management—just a fancy term for keeping customers happy and organized, which is Salesforce’s heart and soul.
- **What This Topic Is All About:**
 - This section is your guide to the building blocks of Salesforce—standard objects (like Accounts and Opportunities) and custom objects (stuff you

create)—and how to set them up, tweak them, and make them work for your team. It's like learning to build and furnish the rooms of your Salesforce house.

Note: The official Salesforce Admin Exam guide often folds "Standard and Custom Objects" into other topics (like Configuration or Object Manager), but for clarity, I'm treating it as a standalone topic with a typical weight of around 10-14%. If you have an exact weight from your exam version, let me know—I'll adjust!

Overview

"Standard and Custom Objects" is all about the core data containers in Salesforce—standard objects are the ready-made ones Salesforce gives you (like Accounts for companies or Contacts for people), and custom objects are the ones you build to fit your unique needs (like "Orders" or "Projects"). You'll learn to use, customize, and create these objects to store and manage your team's data. It's a hefty topic—likely 10-14%—because objects are the foundation of everything in Salesforce.

Exam Weight

- **Percentage:** Assumed 10-14% (varies; often blended with Configuration/Object Manager)
- **Why It Matters:** Objects hold your data—without them, Salesforce is an empty shell. Mastering this is key to your test score and real-world admin skills, as every process, report, or automation depends on them.

Objectives (In Super-Simple Terms)

- Learn what standard objects are—like Accounts or Opportunities—and how to use them for everyday stuff.
 - Figure out how to create custom objects—like "Events" or "Invoices"—to track things Salesforce doesn't cover out of the box.
 - Get comfy customizing objects—like adding fields or relationships—so they fit your team's needs perfectly.
 - Understand how objects connect—like linking Contacts to Accounts—to make data work together smoothly.
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Structure of the Study Guide

- **Definitions:** Big, clear explanations of key terms.
 - **Categories:** Topics split into easy-to-digest chunks.
 - **Bullet Points:** Massive, beginner-friendly summaries with tons of detail.
 - **Tables:** Side-by-side comparisons to keep it simple.
 - **Practical Scenarios:** Loads of real-world examples you can picture doing.
 - **Study Tips:** Step-by-step ways to nail this.
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Definitions (Huge Summaries with Tons of Beginner Details)

- **Object:**
 - **What It Is:** A container for data in Salesforce—like a filing cabinet for Accounts or Opportunities.
 - **Details:** Think of it as a big box where you store info—like “Accounts” holds company names and addresses, or “Opportunities” tracks sales deals. Each object has records (like individual files) and fields (like labels on the files—e.g., “Name,” “Amount”). Standard objects come ready-made; custom ones you build.
- **Standard Object:**
 - **What It Is:** Pre-built data containers from Salesforce—like Accounts, Contacts, or Leads.
 - **Details:** These are like furniture Salesforce delivers—like an “Accounts” cabinet for companies or a “Contacts” drawer for people. They’re designed for common CRM needs (e.g., sales, support), and you can tweak them but not rebuild them from scratch.
- **Custom Object:**
 - **What It Is:** A data container you create—like “Projects” or “Orders”—for stuff unique to your business.
 - **Details:** This is your DIY kit—like building a new shelf for “Event Tickets” because Salesforce didn’t include one. You decide the fields (e.g., “Ticket

Number”) and how it connects to other objects (e.g., “Event” links to “Contacts”).

- **Field:**

- **What It Is:** A piece of info in an object—like “Phone” on Contacts or “Amount” on Opportunities.
- **Details:** These are like labels on a form—each field holds a specific detail (e.g., text like “John Doe,” numbers like “\$500,” dates like “03/10/2025”). You can use standard fields or add custom ones to fit your needs.

- **Record:**

- **What It Is:** A single entry in an object—like one Account for “Acme Inc.”
- **Details:** Think of it as a file in the cabinet—each record is one instance of an object, like “Acme Inc.” in Accounts with fields filled in (e.g., “Name = Acme Inc.,” “Phone = 555-1234”). Records are what users create and work with daily.

- **Relationship:**

- **What It Is:** A link between objects—like connecting Contacts to Accounts.
- **Details:** This is like a bridge—relationships let objects talk to each other. A “Lookup” links one record to another (e.g., Contact to Account), while a “Master-Detail” ties them tighter (e.g., Order Items to Orders). It’s how data stays connected and useful.

Categories

- **Object Tools:** The big areas you’ll work with to manage objects.
 - Standard Objects
 - Custom Objects
 - Fields and Relationships

Detailed Breakdown (Bullet Points with Massive Beginner Summaries)

1. Object Tools

- **Standard Objects**

- **Summary:** Ready-made data containers Salesforce provides—like Accounts, Contacts, Opportunities—to handle common business needs.

- **Details:**

- These are your out-of-the-box essentials—like a starter kit for your Salesforce house. Salesforce built them for CRM basics (sales, marketing, support), and they come with fields and features you can tweak but not totally redo. They’re the backbone of most orgs, so knowing them is key.
- **How You Use Them:** They’re already in your org—find them in Setup or the navigation bar. Here’s a mega-breakdown of the big ones:

- **Accounts:**

- **What It Does:** Stores companies or organizations—like “Acme Inc.”
- **Details:** Think of it as your customer filing cabinet—holds business info like “Name,” “Industry,” “Phone.” Comes with standard fields (e.g., “Billing Address”) and related lists (e.g., “Contacts,” “Opportunities”).
- **Example:** “Acme Inc.” record—fields like “Name = Acme Inc.,” “Type = Customer,” “Website = acme.com”—links to its Contacts.

- **Contacts:**

- **What It Does:** Stores people—like “Jane Doe” at “Acme Inc.”
- **Details:** This is your Rolodex—tracks individuals with fields like “First Name,” “Email,” “Account Name” (links to an Account). Perfect for sales reps or support agents reaching out.
- **Example:** “Jane Doe” record—“First Name = Jane,” “Last Name = Doe,” “Email = jane@acme.com,” “Account = Acme Inc.”

- **Opportunities:**

- **What It Does:** Tracks sales deals—like “Q1 Software Sale.”
 - **Details:** Your deal tracker—fields like “Amount,” “Stage” (e.g., Prospecting, Closed Won), “Close Date.” It’s how sales teams follow potential revenue.
 - **Example:** “Q1 Software Sale”—“Amount = \$10,000,” “Stage = Negotiation,” “Close Date = 03/31/2025,” “Account = Acme Inc.”
- **Leads:**
 - **What It Does:** Stores potential customers—like “John Smith” from a trade show.
 - **Details:** Your prospect bucket—fields like “Name,” “Company,” “Status” (e.g., New, Qualified). Leads get converted to Accounts/Contacts/Opportunities when they’re hot.
 - **Example:** “John Smith”—“Company = Smith Co.,” “Email = john@smithco.com,” “Status = New.”
- **Cases:**
 - **What It Does:** Tracks support issues—like “Broken Printer Ticket.”
 - **Details:** Your helpdesk log—fields like “Case Number,” “Status” (e.g., Open, Closed), “Priority.” Great for customer service teams.
 - **Example:** “Printer Issue”—“Subject = Printer Jam,” “Status = Open,” “Priority = High,” “Contact = Jane Doe.”
- **How You Tweak Them:** Setup > Object Manager > [Object]:
 - Add custom fields—like “Customer Tier” on Accounts.
 - Edit layouts—like put “Phone” at the top of Contacts.
 - Set permissions—like “Sales Reps” edit Opportunities.

- **Why It's Great:** They're ready to roll—like pre-built Lego sets. “Accounts” and “Contacts” handle customers, “Opportunities” drive sales—all wired to work together.
 - **What's Tricky:** You can't delete or totally remake them—Salesforce owns the core. Field names might confuse—like “Lead Status” vs. “Opportunity Stage.” Learn their quirks!
 - **Real-Life Example:** Sales team uses “Leads” for trade show names, converts them to “Accounts” and “Opportunities” when they bite—standard flow in action.
- **Custom Objects**
 - **Summary:** Data containers you build—like “Projects” or “Orders”—to track stuff Salesforce doesn't cover out of the box.
 - **Details:**
 - These are your custom creations—like adding a new room to your Salesforce house. Need to track “Event Registrations” or “Warranty Claims”? Build a custom object! You define the fields, relationships, and rules to match your business perfectly.
 - **How You Set It Up:** Setup > Object Manager > “Create” > “Custom Object.” Here's the mega-step-by-step:
 - **Define It:**
 - **Label:** Like “Projects”—what users see.
 - **Plural Label:** Like “Projects”—for lists.
 - **Object Name:** Like “Project__c”—tech name (Salesforce adds “__c” for custom).
 - **Description:** Like “Tracks project details”—your note.
 - **Record Name:** Field for each record—like “Project Name” (text) or “Project ID” (auto-number, e.g., “PRJ-0001”).
 - **Features:** Check boxes—like “Allow Reports,” “Allow Activities” (tasks/events), “Track Field History.”
 - **Save It:** Click “Save”—it's live in Object Manager.

- **Add Fields:** See below—e.g., “Start Date,” “Budget.”
 - **Add Tab:** Setup > Object Manager > “Projects__c” > “Create Tab”—makes it clickable.
 - **Why It’s Great:** Total freedom—like building a shelf for “Books” when Salesforce only gave you “Movies.” A “Orders__c” object can track order numbers, dates, totals—exactly what your team needs.
 - **What’s Tricky:** Plan ahead—changing an object later (e.g., deleting fields) can mess with data. Name it smart—“Order__c” (singular) avoids confusion. Test it—users need tabs and perms to see it.
 - **Real-Life Example:** Event company builds “Events__c”—Label = “Events,” Record Name = “Event Name” (text), fields like “Date,” “Venue”—tracks every gala perfectly.
- **Fields and Relationships**
 - **Summary:** Tools to add data details (fields) and connect objects (relationships)—like “Due Date” on Projects or linking Orders to Accounts.
 - **Details:**
 - Fields are the info slots, relationships are the glue—together, they make objects useful. Add “Priority” to Cases or link “Orders__c” to “Accounts”—it’s how you customize and connect your data world.
 - **How You Set It Up:** Setup > Object Manager > [Object] > Fields & Relationships:
 - **Fields:**
 - **What It Does:** Adds data slots—like “Status” or “Total.”
 - **Details:** Click “New”:
 - **Types:**
 - **Text:** Like “Name”—short (255 chars) or long (Text Area).
 - **Number:** Like “Amount”—plain or currency (e.g., “\$500”).

- **Picklist:** Dropdown—like “Status = Open, Closed.”
 - **Date:** Like “Close Date”—e.g., “03/10/2025.”
 - **Checkbox:** Yes/No—like “Urgent?”
 - **Formula:** Calculated—like “Total = Quantity * Price.”
 - **Auto-Number:** Unique ID—like “ORD-0001.”
- **Details:** Name it (e.g., “Priority”), set required (yes/no), add help text (e.g., “High = urgent”).
- **FLS:** Set visibility—like “Hidden” for “Budget” from reps.
- **Why It’s Cool:** Tailors objects—like “Events__c” gets “Attendance” (number) and “Theme” (text)—fits your story.
- **Example:** Add “Budget” (currency) to “Projects__c”—required, visible to managers—tracks cash flow.
- **Relationships:**
 - **What It Does:** Links objects—like Contacts to Accounts.
 - **Details:** Click “New” > “Lookup” or “Master-Detail”:
 - **Lookup:** Loose link—like “Event__c” to “Contact” (one Contact per Event):
 - Name it—like “Event Contact.”
 - Related To: “Contact.”
 - Optional—can be blank.
 - **Master-Detail:** Tight link—like “Order_Items__c” to “Orders__c”:
 - Name it—like “Order.”

- Related To: “Orders__c.”
- Required—item needs an order; deleting order deletes items.
- Roll-Up Summary: On master—like “Total Items” sums “Quantity” from items.
- **Why It’s Cool:** Connects the dots—like “Orders__c” links to “Accounts” so reps see customer order history.
- **Example:** “Orders__c” gets Lookup “Customer” to “Account”—each order ties to a company.
- **Why It’s Great:** Fields make objects yours—like “Cases” with “Resolution Notes.” Relationships weave a web—like “Contacts” under “Accounts”—data flows together.
- **What’s Tricky:** Too many fields slow pages—keep it lean (e.g., 10-20 max). Lookup vs. Master-Detail—choose right (Master-Detail locks tighter). Test perms—fields might hide if FLS is off.
- **Real-Life Example:** “Projects__c”—add “Start Date” (date), “Status” (picklist: Planning, Active, Done), Lookup “Manager” to “User”—tracks who’s running it.

Tables

Table 1: Standard vs. Custom Objects

What’s Different	Standard Objects	Custom Objects
Source	Salesforce-made	You-made
Examples	Accounts, Opportunities	Projects__c, Orders__c
Flexibility	Tweakable	Fully customizable
Use Case	Common CRM needs	Unique business needs

Table 2: Field Types

Type	What It Holds	Example
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Type	What It Holds	Example
Text	Words	“Project Name = Q1 Launch”
Number/Currency	Numbers	“Budget = \$5,000”
Picklist	Dropdown options	“Status = Open”
Date	Dates	“Start = 03/10/2025”
Checkbox	Yes/No	“Complete? = Yes”
Formula	Calculated	“Total = Price * Qty”

Table 3: Lookup vs. Master-Detail

What’s Different	Lookup	Master-Detail
Link Strength	Loose—optional	Tight—required
Deletion	Independent	Master deletion kills details
Roll-Up	No	Yes (e.g., sum child fields)
Example	Contact to Account	Order Item to Order

Practical Scenarios

1. Use Accounts:

- **Need:** Track customer companies.
- **Solution:** Use “Accounts”—create “TechCorp” record, fill “Name = TechCorp,” “Industry = Tech,” “Phone = 555-9876”—links to Contacts.

2. Build Orders Object:

- **Need:** Track customer orders.
- **Solution:** Setup > Object Manager > New Custom Object, Label = “Orders,” Record Name = “Order Number” (auto-number “ORD-{0000}”), add tab—tracks orders.

3. Add Custom Fields:

- **Need:** Add “Priority” to Cases.
- **Solution:** Setup > Object Manager > Case > Fields > New, Picklist “Priority” (High, Medium, Low), required—cases get urgency.

4. Link Orders to Accounts:

- **Need:** Tie orders to customers.
- **Solution:** Setup > Object Manager > Orders__c > Fields > New Lookup, “Customer” to “Account”—each order shows its company.

5. Track Project Budgets:

- **Need:** Sum budget on Projects.
- **Solution:** “Projects__c” > New Field “Budget” (currency), “Project_Items__c” > Master-Detail to “Projects__c,” “Cost” (currency), add Roll-Up Summary “Total Cost” on Projects__c—sums items.

Study Tips

- **Hands-On:** Get a free org (developer.salesforce.com)—tweak Accounts, build a custom object, add fields and a Lookup.
- **Start Simple:** Trailhead’s “Data Modeling” module—free, with videos and practice.
- **Focus:** Know Standard Objects (Accounts, Opportunities), Custom Objects (build process), Fields (types), Relationships (Lookup vs. Master-Detail).
- **Practice:** Try “Make an Orders object?” or “Link Contacts to Events?”—exam drills.
- **Beginner Boost:** Watch “Salesforce Objects 101” on YouTube; build one object daily—like “Events__c” then fields.
- **Time:** Spend 10-14% here—5-7 hours of 50—split: 2 on Standard, 3 on Custom, 2 on Fields/Relationships.