

## Salesforce Admin Exam Study Material: Object Manager and Lightning App Builder (20%)

### Salesforce Basics: For Complete Beginners

If you've never touched Salesforce before, here's a quick scoop to get you comfy.

- **What is Salesforce?**
  - It's an online tool that helps companies organize their customer info, sales, and daily tasks—all in one spot without needing fancy software.
  - Think of it as a digital helper that keeps your business running smoothly.
- **Why It's Helpful:**
  - It saves time, keeps track of who's buying what, and lets your team work together—whether they're chasing sales or solving problems.
  - As an admin, you're the one tweaking it to match what your team needs, like setting up a perfect workspace.
- **Starter Words:**
  - **Org:** Your company's own Salesforce setup.
  - **Setup:** The control area (top-right gear icon) where you make changes.
  - **CRM:** Customer Relationship Management—Salesforce's way of keeping customers front and center.
- **What This Topic Covers:**
  - This part is about managing objects (where data lives) and building pages (what your team sees) so everything's easy to use.

Let's dive in with this newbie-friendly lens!

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### Overview

This topic teaches you how to handle objects—Salesforce's storage system—and create pages that make work a breeze. You'll set up standard and custom objects, tweak fields and layouts, and use a drag-and-drop tool to design screens. It's 20% of the exam, so it's a big piece of the puzzle.

## Exam Weight

- **Percentage:** 20%
- **Why It Counts:** It's one of the heaviest topics, so getting good at it boosts your chances big time.

## Objectives (In Plain English)

- Learn to add, remove, or adjust fields and layouts—and know what happens if you delete something.
  - Understand how Salesforce's built-in objects link up.
  - Solve real examples by setting up layouts, record types, and processes.
  - Figure out how to build custom objects and get them ready.
  - Master designing user-friendly pages with an easy tool.
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## Structure of the Study Guide

- **Definitions:** Clear meanings for key terms.
  - **Categories:** Topics split into chunks.
  - **Bullet Points:** Summaries with beginner-friendly details.
  - **Tables:** Handy comparisons.
  - **Practical Scenarios:** Real-world tries.
  - **Study Tips:** How to get it down.
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## Definitions (Summaries with Beginner Details)

- **Object Manager:**
  - **What It Is:** The spot in Salesforce where you manage objects—the containers that hold your data.
  - **Details:** It's like your control room. You go here to tweak the objects Salesforce gives you (like Account) or make new ones (like "Project"). It lives in Setup and helps you decide what info matters to your team.

- **Lightning App Builder:**
  - **What It Is:** A drag-and-drop tool for making pages your team sees.
  - **Details:** Imagine it as a playground—you grab pieces and arrange them to build dashboards or record screens that look nice and work well. No tech wizardry needed, just move stuff around.
- **Standard Object:**
  - **What It Is:** Prebuilt objects from Salesforce, like Account or Contact.
  - **Details:** These are ready-made storage spots for common stuff—like customers or sales deals. You can't delete them, but you can add your own fields or change how they look to fit your crew.
- **Custom Object:**
  - **What It Is:** Objects you create for unique data, like "Project" or "Invoice."
  - **Details:** When the standard ones don't cut it, you whip these up. You name them, decide what goes inside, and set them up however your team needs—like a custom box for special info.
- **Field:**
  - **What It Is:** A single piece of info inside an object, like "Phone" or "Date."
  - **Details:** Fields are like little drawers in an object—each holds one thing, like a name or number. You pick the type (text, date) so it matches what you're tracking.
- **Page Layout:**
  - **What It Is:** The way fields and buttons show up on a screen.
  - **Details:** It's how you arrange things so your team finds what they need fast—like putting "Email" up top or hiding "Bonus" from some folks. It's all about making work smooth.
- **Record Type:**
  - **What It Is:** A trick to make one object work differently for different tasks.
  - **Details:** It's like giving an object multiple personalities—like "New Sale" vs. "Renewal" for Opportunity, each with its own setup. Keeps things neat for different jobs.

- **Relationship:**
    - **What It Is:** How objects connect to each other.
    - **Details:** This links your data—like tying a Contact to an Account. It's the glue that shows how everything fits together, making it easier to follow.
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## Categories

- **Object Management:** Handling your data containers.
    - Standard Objects
    - Custom Objects
    - Fields and Relationships
  - **Customization:** Tweaking how things look and flow.
    - Page Layouts
    - Record Types
    - Business Processes
  - **Lightning App Builder:** Building screens your team loves.
    - Page Types
    - Components
    - Dynamic Features
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## Detailed Breakdown (Bullet Points with Expanded Summaries)

### 1. Object Management

- **Standard Objects**
  - **Summary:** Prebuilt objects Salesforce gives you, like Account for companies or Opportunity for sales.
  - **Details:**

- You get handy ones right away: Account (for businesses you deal with), Contact (for people), Opportunity (for deals you're working), Lead (for possible customers), and Case (for help requests).
  - They're locked in—you can't delete them—but you can add fields or change their setup. They're already connected, like Contact linking to Account, so your team can see how people and companies relate without extra work.
- **Custom Objects**
    - **Summary:** Objects you make yourself for special info, like "Projects" or "Donations."
    - **Details:**
      - These are for when the standard objects don't cover what you need—like tracking volunteer sign-ups or event tickets.
      - Go to Setup > Object Manager > Create, give it a name (like "Project\_\_c"), and choose if each record gets a name (e.g., "Summer Project") or a number (e.g., "P-001").
      - You can turn on extras—like letting it show in reports or tracking changes—so it fits your team perfectly. It's all about making Salesforce yours.
- **Fields and Relationships**
    - **Fields Summary:** The pieces of info you put in objects, like names or dates.
    - **Fields Details:**
      - **Text:** For words—like "Customer Name." It's where you type anything short, like a note or label, up to a few sentences.
      - **Number:** For counting—like "Total Cost." Use it for anything you'd tally up, like money or quantities, so you can do math later.
      - **Picklist:** A list to pick from—like "Status: Open, Closed." It keeps everyone choosing the same options, so data stays clean.
      - **Checkbox:** Yes or no—like "Done?" Just check it if it's true—great for simple stuff like marking something finished.

- **Date:** For calendar days—like "Start Date." It's your way to track when things happen, like deadlines or events.
  - **Formula:** Auto-fills with math—like "Profit = Sales - Costs." You set a rule, and it figures it out for you—saves time!
  - Add them in Object Manager > Fields & Relationships > New—pick the type and name it. Deleting a field wipes its data, so check it's not used in reports or rules first!
  - **Relationships Summary:** How objects tie together to make sense.
  - **Relationships Details:**
    - **Lookup:** A loose connection—like "Volunteer" to "Event." The volunteer's okay if the event's gone—it's not a must-have link, just a handy tie.
    - **Master-Detail:** A strong connection—like "Payment" to "Invoice." If the invoice disappears, the payment does too—they're joined tight. You can also add up payments for one invoice, which is super useful.
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## 2. Customization

- **Page Layouts**
  - **Summary:** How you arrange fields and buttons on a record's screen.
  - **Details:**
    - It's like setting up a desk—you put key stuff like "Phone" where it's easy to see and tuck away things like "Private Notes" from some users.
    - You can add buttons (like "Email Now") or lists of related info (like "Past Sales") to make it a one-stop shop.
    - Do it in Object Manager > Page Layouts, then decide who gets which version—like a simple one for reps, a detailed one for managers.
- **Record Types**
  - **Summary:** Different setups for one object based on what it's for.
  - **Details:**

- Think of splitting Opportunity into "New Sales" (for fresh deals) and "Renewals" (for repeat customers)—each gets its own style.
  - You can tweak what options show—like "New" has "Pitching" while "Renewal" has "Check-In"—and pair them with custom screens.
  - Set them up in Object Manager > Record Types—it's like giving one object two jobs, keeping everything clear for your team.
- **Business Processes**
    - **Summary:** The steps an object follows, like a path for sales or support.
    - **Details:**
      - For Opportunity, it's a roadmap like "Start > Talk > Win"—so everyone knows where they stand.
      - Make it in Object Manager > Business Processes, picking the steps, and link it to record types so "New Sales" and "Renewals" can have their own flows.
      - It's a guide that keeps work on track and helps you see what's done or coming up.
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### 3. Lightning App Builder

- **Page Types**
  - **Summary:** The kinds of screens you can build for your team.
  - **Details:**
    - **Home Page:** The first screen in an app—like a welcome spot with quick updates, like tasks or sales numbers.
    - **Record Page:** A screen for one record—like an Account's details, set up to be clear and helpful.
    - **App Page:** A custom screen for something special—like a "Team Goals" page that's not about just one thing.
- **Components**
  - **Summary:** The pieces you add to screens to make them useful.

- **Details:**
  - **Record Detail:** Shows the fields—like all the info (name, email) for a Contact. It's the main chunk of data on the page.
  - **Related List:** Lists tied-in records—like all Opportunities for an Account. Keeps connections right there to see.
  - **Tabs:** Splits the page into parts—like "Details" and "Notes" tabs, so it's not a big mess.
  - **Charts:** Pictures of data—like a bar graph of sales. Turns numbers into something easy to get.
  - **Custom:** Extra goodies from outside—like a map or tool you grab from AppExchange to make it fancy.
  - Build in Lightning App Builder—just start a page, drag these on, and it comes to life.
- **Dynamic Features**
  - **Summary:** Smart ways to make screens adjust to who's using them.
  - **Details:**
    - **Visibility Rules:** Show or hide stuff based on rules—like only managers see "Approve," or it shows when a deal's ready to close.
    - **Dynamic Forms:** Add fields right on the page—like putting "Due Date" wherever you want, no extra steps. You can even make them pop up only when needed (e.g., "Bonus" if sales are high).

## Tables

**Table 1: Standard vs. Custom Objects**

<b>What's Different</b>	<b>Standard Objects</b>	<b>Custom Objects</b>
<b>Who Made It</b>	Salesforce	You
<b>Examples</b>	Account, Contact	Project, Invoice
<b>Can You Delete?</b>	No	Yes

What's Different	Standard Objects	Custom Objects
<b>Customize It?</b>	Add fields, tweak layouts	Build it your way
<b>Name Style</b>	Simple (e.g., "Lead")	"__c" (e.g., "Event__c")

**Table 2: Lookup vs. Master-Detail Relationships**

What's Different	Lookup	Master-Detail
<b>Must Have It?</b>	Optional	Required
<b>If Parent Goes?</b>	Child stays	Child goes too
<b>Can Add Up?</b>	No	Yes (e.g., total payments)
<b>Who Owns It?</b>	Separate	Child follows parent
<b>Example</b>	Volunteer to Event	Payment to Invoice

**Table 3: Page Layouts vs. Lightning Pages**

What's Different	Page Layouts	Lightning Pages
<b>Where You Build</b>	Object Manager	Lightning App Builder
<b>What It Covers</b>	Fields, buttons	Whole page
<b>Works Where?</b>	Classic & Lightning	Lightning only
<b>Smart Stuff?</b>	Basic	Hide/show, flexible fields
<b>Who Sees It?</b>	By role or type	By app, role, or type

## Practical Scenarios

### 1. Consulting Firm:

- Make a "Project\_\_c" object, add fields like "Name" (Text) and "Budget" (Number), link to Account.
- Add a "Status" picklist (Active, Done) and total budgets on Account.

### 2. Sales Team:

- Split Opportunity into "New" and "Renewal" record types, set steps, assign layouts.
- Build a Lightning page with a sales chart for "New."

### 3. Discount Control:

- Add "Discount" to Opportunity in Lightning App Builder, make it manager-only with a rule.
- Include a "Reason" field that shows if there's a discount.

### 4. School Enrollment:

- Create "Enrollment\_\_c," link to Contact and "Course\_\_c," set steps (Applied > Enrolled).

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## Study Tips

- **Hands-On:** Get a free Salesforce org (developer.salesforce.com) and play with objects and pages.
- **Easy Start:** Try Trailhead's "Platform Basics" then "Object Manager"—it's free and simple.
- **Focus:** Learn field types, how objects connect, and page-building tricks.
- **Practice:** Do sample questions on deleting fields or setting record types.
- **Beginner Boost:** Watch a "Salesforce Basics" video; try one small thing (like a field) daily.
- **Time:** Spend 20% of your study here—like 10 hours of 50 total.