

Salesforce Advanced Admin Exam Study Guide: Topic 1 - Security and Access (20%)

Salesforce Basics: For Advanced Admin Newbies

If you're stepping up from the basic Admin cert or just diving into Advanced Admin territory, don't worry—here's a huge, welcoming intro to get you pumped, comfortable, and ready to roll.

- **What is Salesforce Advanced Admin?**
 - It's the next level of Salesforce mastery—an online platform where you take your org from “works fine” to “runs like a dream,” focusing on advanced security, automation, and optimization, all in the cloud with no tech nightmares required.
 - Think of it as your business's master strategist—like a genius architect who locks down data, streamlines processes, and makes Salesforce sing for your team, building on your basic Admin skills.
- **Why It's a Game-Changer:**
 - It takes you beyond the basics—like setting up users or simple reports—and dives into complex stuff: granular security, delegated administration, and enterprise-level tweaks. It's like upgrading from managing a small shop to running a bustling city—your team gets efficiency, safety, and power without the chaos.
 - As an Advanced Admin, you're the pro who fine-tunes the org—like teaching a super-smart robot not just the basics but the fancy tricks, ensuring it's secure, scalable, and tailored to perfection.
- **Key Words to Start With:**
 - **Org:** Your company's Salesforce universe—like your team's high-tech fortress where data lives and advanced magic happens.
 - **Setup:** The control hub (top-right gear icon) where you tweak the deep stuff—like the master console of your Salesforce spaceship, giving you ultimate control.
 - **CRM:** Customer Relationship Management—the heart of Salesforce, now with advanced tools to keep customers and your team thriving.
- **What This Topic Is All About:**

- “Security and Access” is your deep dive into locking down Salesforce—advanced user permissions, role hierarchies, sharing models, and delegated admin setups. It’s like being the chief security officer of your org, mastering the locks, keys, and secret passages.
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Overview

"Security and Access" (20%) is the cornerstone of the Advanced Admin exam—it’s about mastering complex security setups, from profiles and roles to sharing rules, manual sharing, and delegated administration. You’ll go beyond basic CRUD and OWD, tackling enterprise-level access control, troubleshooting, and optimization. It’s 20% of the exam—the biggest chunk—because security is mission-critical for any org.

Exam Weight

- **Percentage:** 20%
- **Why It Matters:** Advanced security keeps data safe and users productive in big, complex orgs. Mess it up, and sensitive info leaks or workflows stall—20% reflects its weight in real-world impact and exam focus.

Objectives (In Super-Simple Terms)

- Learn how to set up advanced user permissions—like mixing profiles, roles, and permission sets—so everyone gets just the right access.
 - Figure out complex sharing—like team-based rules or manual overrides—to open data securely.
 - Get comfy with delegated administration—like handing mini-keys to team leads—so you’re not the only gatekeeper.
 - Master troubleshooting—like fixing “Why can’t Jane see this record?”—to keep the org humming.
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Structure of the Study Guide

- **Definitions:** Big, clear explanations of key terms.
- **Categories:** Topics split into digestible pieces.
- **Bullet Points:** Massive, beginner-friendly summaries with heaps of detail.

- **Tables:** Side-by-side comparisons to keep it simple.
 - **Practical Scenarios:** Tons 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)

- **Profile:**
 - **What It Is:** A permission set defining what users can do—like edit Opportunities or run reports.
 - **Details:** Think of it as a job uniform—it’s the foundation of user powers, controlling app access, object CRUD (Create, Read, Update, Delete), and system permissions (e.g., “Customize Application”). Every user gets one, and Advanced Admins tweak it for precision—like tailoring a suit for a specific role.
- **Role Hierarchy:**
 - **What It Is:** A ladder of positions—like “CEO” to “Rep”—that controls record visibility.
 - **Details:** This is your org’s family tree—higher roles see all records below them (e.g., a Manager sees Reps’ Accounts). It’s about data access, not actions (that’s profiles), and Advanced Admins use it to mirror real-world reporting lines—like a boss overseeing team files.
- **Permission Set:**
 - **What It Is:** Extra permissions added to a user—like “Delete Cases”—without changing their profile.
 - **Details:** Imagine it as a power-up—like giving a superhero a bonus gadget. It’s a flexible way to grant specific access (e.g., “Let Mike export reports”) without rewriting the “Sales Rep” profile—perfect for exceptions or temporary boosts.
- **Sharing Rule:**
 - **What It Is:** A rule to share records—like “West Team sees West Accounts”—beyond OWD or hierarchy.

- **Details:** This is your spare key—it opens data to specific roles, groups, or users based on ownership or criteria (e.g., “Region = East”). Advanced Admins use it to fine-tune access—like letting sales teams collaborate without making everything public.
 - **Manual Sharing:**
 - **What It Is:** A one-off share—like “Give Jane this Account”—set by a record owner.
 - **Details:** Think of it as a handwritten note—it’s a quick, manual way to grant access to a single record. It’s user-driven, not admin-set, and Advanced Admins manage its chaos—like ensuring it doesn’t override tighter rules.
 - **Delegated Administration:**
 - **What It Is:** Giving limited admin powers—like “Manage Users”—to non-admins.
 - **Details:** This is your deputy badge—lets team leads or managers handle tasks (e.g., reset passwords) without full admin access. It’s how Advanced Admins scale—delegating grunt work while keeping control.
 - **Organization-Wide Defaults (OWD):**
 - **What It Is:** The default lock on an object—like “Private” for Accounts—so only owners see records.
 - **Details:** Picture it as the org’s master lock—it sets the baseline (Private, Public Read Only, Public Read/Write) before roles or rules kick in. Advanced Admins balance it with sharing—like starting tight, then opening strategically.
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Categories

- **Advanced Security Tools:** The big areas you’ll master.
 - Profiles, Permission Sets, and Roles
 - Sharing Models (OWD, Sharing Rules, Manual Sharing)
 - Delegated Administration
 - Troubleshooting Access Issues
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Detailed Breakdown (Bullet Points with Massive Beginner Summaries)

1. Advanced Security Tools

- **Profiles, Permission Sets, and Roles**
 - **Summary:** Tools to define what users can do (profiles), add extra permissions (permission sets), and control record visibility (roles)—layered for precision in complex orgs.
 - **Details:**
 - These are your security building blocks—like a three-part lock system. Profiles set the base (e.g., “Edit Accounts”), permission sets tweak it (e.g., “Add Delete”), and roles decide what records show up (e.g., “Team’s Opportunities”). Advanced Admins juggle them for enterprise needs—like balancing 500 users across 20 teams.
 - **How You Set It Up:**
 - **Profiles:** Setup > Users > Profiles:
 - **What It Does:** Controls apps, objects, fields, and system perms.
 - **Details:** Edit or clone (e.g., “Standard User” to “Sales Pro”):
 - **Apps:** Check “Sales” for visibility.
 - **Object Permissions:** “CRUD”—like “Read/Edit” on Opportunities, no “Delete.”
 - **Field-Level Security (FLS):** “Visible” or “Hidden”—like “Revenue” off for reps.
 - **System Permissions:** Like “View All Data” (rare) or “Manage Users.”
 - Assign: Setup > Users > [User] > Profile = “Sales Pro.”
 - **Why It’s Cool:** One profile fits many—like “Sales Pro” for 50 reps. Advanced tweak—like “No Delete” keeps data safe.

- **Example:** “Support Pro” profile—“Read/Edit” Cases, “Read Only” Accounts, “Service” app visible—agents locked in.
- **Permission Sets:** Setup > Users > Permission Sets:
 - **What It Does:** Adds specific perms—like “Export Reports.”
 - **Details:** “New”:
 - Name: Like “Report Guru.”
 - Perms: Check “Export Reports” or “Delete Opportunities.”
 - Assign: Setup > Users > [User] > Permission Set Assignments > Add “Report Guru.”
 - **Why It’s Cool:** Granular—like “Jane gets Delete, others don’t.” Stackable—multiple sets per user.
 - **Example:** “Case Closer” set—“Delete Cases”—assigned to senior agent Mike—flexible power-up.
- **Roles:** Setup > Users > Roles:
 - **What It Does:** Builds hierarchy—like “CEO > Sales VP > Rep.”
 - **Details:** “Set Up Roles”:
 - Add: Like “Sales Rep - West” under “Sales Manager - West.”
 - Assign: Setup > Users > [User] > Role = “Sales Rep - West.”
 - **Why It’s Cool:** Higher roles see below—like VP sees all sales. Scales big orgs—like 10 regions, 100 reps.
 - **Example:** “CEO > Sales VP > West Manager > West Rep”—Rep owns “Acme Deal,” Manager sees it, VP sees all West.

- **Why It's Great:** Layers control—like profiles for actions, roles for visibility, sets for extras. A rep edits their deals, Manager sees all, Jane deletes—perfect balance.
 - **What's Tricky:** Overlap—profile says “Edit,” but role hides records. Too many sets clog it—track them. Test combos—reps might miss data if misaligned.
 - **Real-Life Example:** “Sales Pro” profile (Edit Opportunities), “West Rep” role (sees West deals), “Report Guru” set (exports reports)—rep’s ready, tailored, and reporting.
- **Sharing Models (OWD, Sharing Rules, Manual Sharing)**
 - **Summary:** Systems to set default access (OWD), auto-share records (Sharing Rules), and manually grant access (Manual Sharing)—advanced control for enterprise data.
 - **Details:**
 - This is your data-sharing toolkit—like a lockbox with smart keys. OWD sets the base, Sharing Rules open it strategically, and Manual Sharing handles one-offs. Advanced Admins wield these for big teams—like sharing across 5 regions without chaos.
 - **How You Set It Up:** Setup > Security > Sharing Settings:
 - **OWD:**
 - **What It Does:** Default lock—like “Private” for Accounts.
 - **Details:** “Edit”:
 - Options: “Private” (owner only), “Public Read Only” (all see), “Public Read/Write” (all edit).
 - Set per object—like “Opportunities = Private.”
 - **Why It's Cool:** Starts secure—like “Private” keeps deals tight until you share. Advanced tweak—like “Public Read Only” for visibility, not edits.
 - **Example:** “Cases = Private”—only owner or hierarchy sees—customer data locked.
 - **Sharing Rules:**

- **What It Does:** Auto-shares—like “East Accounts to East Sales.”
- **Details: “New”:**
 - **Type:**
 - Owner-Based: “Accounts owned by East Reps” to “East Sales” role.
 - Criteria-Based: “Accounts where Region = West” to “West Sales.”
 - **Access:** “Read Only” or “Read/Write.”
 - **Share With:** Roles, groups—like “Sales Managers.”
- **Why It’s Cool:** Scales—like “Share 100 West Accounts at once.” Criteria flexes—like “Industry = Tech” to specialists.
- **Example:** “Opportunities where Amount > 20,000” to “Managers,” “Read Only”—big deals tracked.
- **Manual Sharing:**
 - **What It Does:** One-off access—like “Jane sees this Case.”
 - **Details:** On record > “Sharing” button:
 - Add user (e.g., “Jane”), set “Read” or “Edit.”
 - Owner or above OWD can do it—like “Private” needs owner approval.
 - **Why It’s Cool:** Quick fix—like “Jane needs this now.” User-driven—no admin bottleneck.
 - **Example:** Rep shares “Acme Account” with “Mike” (Read)—teamwork on demand.
- **Why It’s Great:** OWD locks, rules scale, manual flexes—like a vault with team keys and guest passes. Advanced Admins mix them—like “Private” OWD, “Region” rules, spot shares.

- **What's Tricky:** OWD changes ripple—test “Public” shifts. Rules stack—order matters (first wins). Manual sharing piles up—audit it (Setup > Security > View Sharing).
 - **Real-Life Example:** “Accounts = Private,” Rule “Region = East” to “East Sales” (Read/Write), Manual share “Acme Inc.” to “Jane”—secure base, team access, one-off fix.
- **Delegated Administration**
 - **Summary:** Giving limited admin powers—like “Reset Passwords”—to non-admins for efficiency in big orgs.
 - **Details:**
 - This is your helper squad—like deputizing lieutenants. You grant specific tasks (e.g., “Manage Users”) to team leads or managers, offloading work while keeping full admin control. Advanced Admins use it to scale—like supporting 1,000 users without drowning.
 - **How You Set It Up:** Setup > Security > Delegated Administration:
 - **Create Group:**
 - **Name:** Like “Sales Admins.”
 - **Delegated Tasks:** Check boxes:
 - “Manage Users” (add/edit users).
 - “Assign Permission Sets” (grant extras).
 - “Manage Roles Below” (tweak hierarchy).
 - “Customize Application” (limited—e.g., fields, not org-wide).
 - **Objects:** Like “Accounts”—they manage records here.
 - **Assign Users:** Add—like “Jane” (Sales Manager)—to group.
 - **Enable:** Save—they’re live.
 - **Why It's Great:** Scales—like “Jane resets passwords for 50 reps.” Keeps you free for big stuff—like org-wide security audits.

- **What's Tricky:** Limited scope—they can't touch OWD or profiles. Monitor—too many delegates muddy control. Test perms—they might overstep.
- **Real-Life Example:** “Support Admins” group—“Manage Users” and “Cases”—agent lead “Mike” adds newbies, assigns cases—support runs smooth.

- **Troubleshooting Access Issues**

- **Summary:** Fixing “Why can't they see this?”—diagnosing profile, role, sharing, or FLS problems in complex setups.
- **Details:**
 - This is your detective work—like solving a locked-door mystery. Advanced Admins dig into why access fails—like “Jane can't edit Opportunities”—checking layers (profile, role, OWD, etc.) to pinpoint and fix.
 - **How You Do It:**
 - **Steps:**
 - **Check User:** Setup > Users > [User]—Profile? Role? Permission Sets?
 - **Profile:** Setup > Profiles > [Profile]—Object perms (e.g., “Edit” on Opportunities)? FLS (e.g., “Amount” visible)?
 - **Role:** Setup > Roles—Hierarchy right? Records visible below?
 - **OWD:** Setup > Sharing Settings—Too tight (e.g., “Private” blocking)?
 - **Sharing:** Rules or Manual—Anything granting access?
 - **Debug Tool:** Setup > Security > Sharing Settings > “Why Can't They See It?”—run for user/record.
 - **Fixes:**
 - Add perm (e.g., “Edit” to profile).
 - Adjust role (e.g., move up hierarchy).

- Tweak sharing (e.g., new rule).
- **Why It's Great:** Saves the day—like “Jane’s back in action!” Advanced skill—handles 500-user orgs with overlapping rules.
- **What's Tricky:** Layers confuse—like profile says “Yes,” but OWD says “No.” Test fixes—small tweak can cascade. Logs help—check Setup Audit Trail.
- **Real-Life Example:** “Mike can’t see West Accounts”—Profile OK (Read), Role “East Rep” (wrong region), fix: move to “West Rep”—access restored.

Tables

Table 1: Profiles vs. Permission Sets vs. Roles

What's Different	Profiles	Permission Sets	Roles
Controls	What users do (CRUD)	Extra perms (e.g., Delete)	What records they see
Scope	Apps, objects, fields	Specific boosts	Hierarchy visibility
Example	“Edit Accounts”	“Export Reports”	“See team Accounts”
Assigned	One per user	Many per user	One per user (optional)

Table 2: Sharing Options

Type	What It Does	Example
OWD	Default lock	“Accounts = Private”
Sharing Rule	Auto-share by rule	“West Accounts to West Sales”
Manual Sharing	One-off user share	“Jane sees Acme Inc.”

Table 3: Delegated Admin vs. Full Admin

What's Different	Delegated Admin	Full Admin
Power	Limited (e.g., Manage Users)	Everything (e.g., OWD)

	What's Different Delegated Admin	Full Admin
Scope	Specific tasks/objects	Org-wide
Example	"Reset passwords"	"Set sharing model"

Practical Scenarios

1. Sales Team Access:

- **Need:** Reps edit Opportunities, Managers see all.
- **Solution:** Profile "Sales Rep" (Edit Opportunities), Role "Rep" under "Manager," OWD "Private"—reps edit, Managers oversee.

2. Region Sharing:

- **Need:** East Sales sees East Accounts.
- **Solution:** OWD "Private," Sharing Rule "Region = East" to "East Sales" (Read/Write)—team collaborates.

3. Delegated User Management:

- **Need:** Sales Lead adds reps.
- **Solution:** Delegated Group "Sales Admins," "Manage Users," assign "Jane"—she onboard reps.

4. Troubleshoot Visibility:

- **Need:** Rep can't see Case.
- **Solution:** Check—Profile (Read OK), Role (no hierarchy), OWD "Private"—fix: add to "Support Rep" role.

5. Manual Share Fix:

- **Need:** Rep shares Opportunity with peer.
 - **Solution:** Opportunity > Sharing > Add "Mike" (Read)—peer jumps in.
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Study Tips

- **Hands-On:** Free org (developer.salesforce.com)—tweak profiles, set sharing rules, delegate tasks.
- **Start Simple:** Trailhead’s “Advanced Security” module—free, with videos and practice.
- **Focus:** Master Profiles/Roles (layers), Sharing (OWD + rules), Delegated Admin (scale), Troubleshooting (logic).
- **Practice:** “Why can’t they edit?” or “Set up team sharing?”—exam-style drills.
- **Beginner Boost:** Watch “Advanced Admin Security” on YouTube; tweak one setting daily—like profile, then rule.
- **Time:** Spend 20%—10 hours of 50—split: 3 on Profiles/Roles, 3 on Sharing, 2 on Delegated, 2 on Troubleshooting.