# Unit 1: Practice Reports and Dashboards

Note: Hello there! Everyone likes to view/study content in different ways. Do you prefer to print a hard copy of this content? Click here to download a printable version of this module and take notes as you go.

## Learning Objectives

After completing this unit, you will be able to:

- Describe the options available when creating or customizing a report, including report type, report format, fields, summarizing data, filtering data, charting, scheduling, and conditional highlighting.
- Demonstrate the impact of the sharing model on reports.
- Demonstrate the options available when creating and modifying dashboards, such as dashboard components, data sources, chart types, scheduling, and running user.
- Describe the capabilities of custom report types.

## Key Topic Areas

This unit prepares you for the analytics section of the Salesforce administrator exam, which makes up 10% of the overall exam. This section of the exam tests these topics.

- Report creation
- Custom reports
- Editing and customizing reports
- Dashboard components
- Data sharing
- Report and dashboard filters

This unit provides a number of interactive, real-world, scenario-based questions that are a lot like the ones you'll encounter as a Salesforce administrator. Looking at these scenarios helps prepare you to take the analytics section of the Salesforce administrator exam. As you tackle the practice questions, you get immediate feedback on your answers, along with detailed information on why your answers are correct (or incorrect).

You can also find interactive flashcards to help you prepare for the analytics section of the exam.

## Download the Guide

Would you like a hard copy of the contents in these modules? Each module includes a link to a printable version you can download. Download the [Administrator Certification Prep: Reporting and Automation guide].

Note: For more information on the Salesforce administrator Certification exam prep, logistics and policies, and maintenance, see the Get Started with Administrator Certification Prep unit in the [Administrator Certification Prep: Setup and Objects module].

# Administrator Certification Prep: Reporting and Automation

## Exam Practice Questions

Ready to jump in? The sample tool below is not scored—it's just an easy way to quiz yourself. To use it, read the scenario on the left side, then click on the answer you think is correct. Some questions may have more than one correct answer. Click submit, and you get a pop-up telling you whether the answer you chose is correct or incorrect, and why. When you reach the end, you can review the answers or retake the questions.

## Scenario 1

A sales manager at Ursa Major Solar wants a team of sales reps to know how many open opportunities they have at any given time.

How should an administrator configure a report for each sales rep to see their own open opportunities?

| ANSWER | FEEDBACK |
|---|---|
| A. CREATE A REPORTING SNAPSHOT GROUPED BY SALES REP. | Incorrect. This does not show a sales rep just their own open opportunities. |
| B. CREATE A REPORT WITH A CROSS FILTER BY MY OPPORTUNITIES. | Incorrect. Cross filters are used in reports to filter for cross object fields. |
| C. CREATE A REPORT FILTERED BY MY OPPORTUNITIES. | **Correct. This report shows a sales rep their own open opportunities.** |
| D. CREATE A REPORT SCHEDULE FOR EACH SALES REP. | Incorrect. A schedule doesn't create a report that allows each sales rep to see their own open opportunities. |

## Scenario 2

Which three report charts show how many leads are in the marketing pipeline based on lead status and what percent each lead status represents? (Choose three answers.)

| ANSWER | FEEDBACK |
|---|---|
| A. GROUPED BAR CHART | Incorrect. A grouped bar chart shows siloed, individual lead information. |
| B. PIE CHART | **Correct. A pie chart shows the number of leads and the percentage of leads as part of the whole.** |
| C. DONUT CHART | **Correct. A donut chart shows the number of leads and the percentage of leads as part of the whole.** |
| E. FUNNEL CHART | **Correct. A funnel chart shows the number of leads and the percentage of leads as part of the whole.** |

## Scenario 3

A finance user with the View All Data permission enabled sees no opportunities when opening a sales pipeline report. However, a sales rep sees opportunities as expected. Opportunities should be visible to only those with permission.

Which two actions should the administrator perform to ensure that the finance user sees opportunities in the pipeline report? (Choose two answers.)

| ANSWER | FEEDBACK |
|---|---|
| A. SELECT SAVE HIERARCHY LEVEL ON THE PIPELINE REPORT. | **Correct. The Save Hierarchy Level checkbox being selected ensures that the hierarchy level that was used when creating a report stays intact. So if the finance user had permission to see reports originally, the same applies when any subsequent report is created.** |
| B. CREATE A NEW REPORT FORMULA ON THE PIPELINE REPORT. | Incorrect: Creating a formula does not change which opportunities are visible. |
| C. UPDATE THE REPORT FILTER TO SHOW ALL OPPORTUNITIES. | **Correct. Using a filter to show all opportunities allows users with the View All Data permission enabled to see all of the opportunities on the report.** |
| D. CHANGE THE ORG-WIDE OPPORTUNITY SHARING DEFAULT TO PUBLIC READ. | Incorrect. This would allow everyone in the organization to see opportunities. |

## Scenario 4

What should an administrator configure to provide each sales rep a dashboard that shows their current Opportunity pipeline?

| ANSWER | FEEDBACK |
|---|---|
| A. SET A DASHBOARD FILTER TO THE CURRENT USER. | Incorrect. Setting the dashboard filter to the current user would only show opportunities for that user, not the user running the dashboard. |
| B. CREATE A DASHBOARD FOLDER FOR EACH USER. | Incorrect. Creating a dashboard folder for each user would not filter the dashboard for users. A dashboard folder is for storing dashboards, limiting visibility to the dashboards in the folder. |
| C. FILTER THE DASHBOARD WITH A DYNAMIC VIEW SET TO THE VP OF SALES. | Incorrect. Dynamic dashboards are limited. The View Dashboard As options are:<br>• Me<br>• Another person<br>• Dashboard viewer |
| D. SET THE DASHBOARD RUNNING USER TO “THE DASHBOARD VIEWER.” | **Correct. This ensures that the dashboard shows data relevant to only the user viewing it.** |

## Scenario 5

A sales user wants to add components to their dashboard.

What is the maximum number of components that can be added to a single dashboard?

| ANSWER | FEEDBACK |
|---|---|
| A. 3 | Incorrect. Each dashboard can have up to 20 components. Each report can have up to 3 cross filters. |
| B. 15 | Incorrect. Each dashboard can have up to 20 components. |
| C. 20 | **Correct. Each dashboard can have up to 20 components.** |
| D. 50 | Incorrect. Each dashboard can have up to 20 components. A dashboard filter can have up to 50 values. |

## Scenario 6

What should the system administrator do when users are unable to find a custom report type?

| ANSWER | FEEDBACK |
|---|---|
| A. MAKE SURE THE NEW REPORT TYPE IS DEPLOYED. | **Correct. Users are not able to access a custom report type if it hasn’t been deployed.** |
| B. MAKE SURE THE USER PROFILE INCLUDES THE REPORT TYPE. | Incorrect. Access to objects is controlled by profiles not based on report type. |
| C. ADD THE NEW REPORT TYPE TO THE RELATED OBJECTS. | Incorrect. Report types are created for the object that is reported on. |
| D. ADD A BUTTON FOR THE NEW REPORT TYPE TO THE REPORT BUILDER. | Incorrect. Report types are part of the Report Builder when deployed. |

## Scenario 7

Ursa Major Solar uses a private data access model. Product managers and sales representatives are in different branches of the role hierarchy.

What should an administrator do to ensure that product managers can report on opportunities in their product line?

| ANSWER | FEEDBACK |
|---|---|
| A. CREATE A SHARING RULE BASED ON CRITERIA. | **Correct. Criteria-based sharing rules determine what records to share based on field values other than ownership.** |
| B. SAVE ALL OPPORTUNITY REPORTS IN A PUBLIC FOLDER. | Incorrect. Saving reports in a public folder will give access to everyone. |
| C. MOVE ALL PRODUCT MANAGERS TO A ROLE BELOW THE SALES REPRESENTATIVES. | Incorrect. If product managers are in a role below sales representatives, they will not be able to see the reports. Product managers would have to be in a role above the sales representatives according to the role hierarchy. |
| D. CREATE A NEW ROLE FOR PRODUCT MANAGERS AND SALES REPRESENTATIVES. | Incorrect. Creating a new role would further separate the role hierarchy. The product managers and sales representatives would not need to be combined or branched off. |

## Exam Topic Flashcards

The following flashcards cover reports, dashboards, and data sharing. Use these interactive flashcards to brush up on some of the key topics you'll find on this part of the exam.

Read the question or term on each card, then click on the card to reveal the correct answer. Click the right-facing arrow to move to the next card, and the left facing arrow to return to the previous card.

| Question/Term | Answer/Definition |
|---|---|
| **What report should an administrator use to display the number of contacts related to an account?** | Summary report with a report formula |
| **What are three reports that can be used to display a list of the top 10 accounts on a dashboard?** | Tabular report with Rows to Display set to 10<br><br>Summary report with a chart<br><br>Summary report without a chart |
| **What should an administrator do to organize the fields available on a report?** | Create a custom report type. |

| | |
|---|---|
| **Tabular Report** | This report is the simplest and fastest way to look at data. Similar to spreadsheets, it consist simply of an ordered set of fields in columns, with each matching record listed in a row. Use this report type for creating lists of records or a list with a single grand total. They can't be used to create groups of data or charts, and can't be used in dashboards unless rows are limited. Examples include contact mailing lists and activity reports. |
| **Summary Report** | This report is similar to a tabular report, but allow users also to group rows of data, view subtotals, and create charts. It can be used as the source report for dashboard components. Use this type of report to show subtotals based on the value of a particular field, or when you want to create a hierarchical list, such as all opportunities for your team, subtotal by Stage and Owner. |

| | |
|---|---|
| **Matrix Report** | Matrix reports allow you to group and summarize data by both rows and columns. They can be used as the source report for dashboard components. Use this type of report for comparing related totals, especially if you have large amounts of data to summarize and you need to compare values in several different fields, or you want to look at data by date and by product, person, or geography. Matrix reports without at least one row and one column grouping show as summary reports on the report run page. |
| **Report Type** | Two kinds of report types:<br>• Standard report<br>• Custom report<br><br>Standard report type gives you access to most Salesforce data. For example, the opportunities report type gives you access to opportunity records and fields in your report.<br><br>Custom report type gives you access to custom objects in Salesforce, or custom views of standard objects, which an admin configures. |

| | |
|---|---|
| **Filter Logic** | Use filter logic to customize how existing filters apply to a report. Each filter is assigned a number. If you'd like your report to return records that meet the criteria of Filter 1 and either Filter 2 or Filter 3, use this filter logic: Filter 1 AND (Filter 2 OR Filter 3). Filter logic requires at least one field filter. |

## Related Badges

Looking for more information? Explore these related badges.

| Badge | Content Type |
|---|---|
|  Create Reports and Dashboards for Sales and Marketing Managers | Project |
|  Reports & Dashboards for Lightning Experience | Module |
|  Sales Reports for Lightning Experience | Module |
|  Lightning Experience Reports & Dashboards Specialist | Superbadge |

Congratulations! You’ve studied up on analytics—reports- and dashboards-related. Up next, dive into the exam section on workflow and automation. Let’s go!

# Unit 2: Study Up on Workflow and Automation

## Learning Objectives

After completing this unit, you will be able to:

- Identify the appropriate automation solution based on the capabilities of workflow/process.
- Describe and demonstrate capabilities and use cases for the approval process.

## Key Topic Areas

This unit prepares you for the workflow and automation section of the Salesforce administrator exam, which makes up 8% of the overall exam. This section of the exam tests these topics.

- Approval processes
- Workflows
- Time dependent workflows
- Approval processes
- Process Builder

Like the previous units, this unit contains practice scenario-based questions and flashcards.

## Exam Practice Questions

Ready to jump in? The sample tool below is not scored—it's just an easy way to quiz yourself. To use it, read the scenario on the left side, then click on the answer you think is correct. Some questions may have more than one correct answer. Click submit, and you get a pop-up telling you whether the answer you chose is correct or incorrect, and why. When you reach the end, you can review the answers or retake the questions

## Scenario 1

The administrator at Ursa Major Solar created a process in Process Builder that sends email alerts when a high-priority case is created. A new support engineer who works remotely complains about not receiving the email alerts. All other users receive these email alerts.

How can a Salesforce administrator troubleshoot this issue?

| ANSWER | FEEDBACK |
|---|---|
| A. VERIFY THE USER'S EMAIL ADDRESS. | **Correct. Make sure the user's email address is in that support engineer's user record, and thus receiving the notifications.** |
| B. CHECK THAT THE PROCESS IS ACTIVE. | Incorrect. Others are receiving the email alerts, so you know that the process is active. |
| C. CHECK THAT THE CORRECT EMAIL TEMPLATE IS USED. | Incorrect. Others are receiving the correct email from the email alerts, so you know the correct email template is used.\ |
| D. CHECK THAT THE PROCESS EVALUATION CRITERIA IS CORRECT. | Incorrect. Others are receiving the email, so you know the process evaluation criteria is correct when the process is being triggered. |

## Scenario 2

Ursa Major Solar created an action that sends a follow-up email to the customer two days after a case is closed. The administrator wants to verify that the process functions correctly.

Which queue should the administrator view to monitor pending actions?

| ANSWER | FEEDBACK |
|---|---|
| A. OUTBOUND MESSAGING DELIVERY QUEUE | Incorrect. Outbound Messaging Delivery Queue shows the messages that have already been sent and delivered. |
| B. MASS EMAIL QUEUE | Incorrect. The Mass Email Queue shows only the mass emails that are sent out. |
| C. PROCESS ACTION QUEUE | **Correct. The Process Action Queue shows process actions, and the administrator iswould be able to monitor pending process actions in this queue.** |
| D. BACKGROUND JOBS QUEUE | Incorrect. Time-based actions do not show in the Background Jobs Queue. Background Jobs, such as when a parallel sharing recalculation is running, are monitored here. |

## Scenario 3

Ursa Major Solar has an auto-response rule to send emails when a customer submits a new case, and an assignment rule to determine case ownership for new cases. In addition, the case object has validation rules to ensure that each case includes values for all fields needed by its owner to resolve the case.

In which order does Salesforce process the immediate actions associated with workflow rules and related business automations for a newly created record?

| ANSWER | FEEDBACK |
|---|---|
| A. ESCALATION RULES, VALIDATION RULES, WORKFLOW RULES, AUTO-RESPONSE RULES, ASSIGNMENT RULES | Incorrect. Validation rules are evaluated before escalation rules, and auto-response rules are evaluated before workflow rules. |
| B. VALIDATION RULES, ASSIGNMENT RULES, AUTO-RESPONSE RULES, WORKFLOW RULES, ESCALATION RULES | **Correct. This is the correct order of evaluation.** |
| C. WORKFLOW RULES, VALIDATION RULES, ASSIGNMENT RULES, ESCALATION RULES, AUTO-RESPONSE RULES | Incorrect. Workflow rules are evaluated after validation rules. |
| D. VALIDATION RULES, ESCALATION RULES, ASSIGNMENT RULES, AUTO-RESPONSE RULES, WORKFLOW RULES | Incorrect. Workflow rules are evaluated before escalation rules. |

## Scenario 4

Ursa Major Solar has a team of account managers that requested email alerts anytime an opportunity or case is created on accounts that they own.

What is the minimum number of workflows needed to accomplish this task?

| ANSWER | FEEDBACK |
|---|---|
| A. ONE WORKFLOW RULE WITH TWO EMAIL ALERTS | Incorrect. Each workflow rule applies to a single object. In this solution the email alerts would be for the same object. |
| B. TWO WORKFLOW RULES WITH ONE EMAIL ALERT EACH | **Correct. Each workflow rule applies to a single object. Opportunity and/or case would need a separate workflow for each object.** |
| C. NO WORKFLOW RULES, BUT TWO EMAIL ALERTS | Incorrect. Email alerts need a workflow to define criteria for the email to be sent. |
| D. FOUR WORKFLOW RULES FOR CREATE AND UPDATE ON OPPORTUNITIES AND ACCOUNTS | Incorrect. Opportunities and cases are created on accounts by the users. The email alerts are to communicate to the account managers that there is a record on their account. |

## Scenario 5

Ursa Major Solar has created an automated approval process to quickly communicate and improve their customer service.

What are two final approval actions in an approval process?

| ANSWER | FEEDBACK |
|---|---|
| A. CREATE A CHATTER POST. | Incorrect. Posting to Chatter is not a final approval action. |
| B. ADD AN EMAIL ALERT. | **Correct. This is a final approval action.** |
| C. SEND AN OUTBOUND MESSAGE. | **Correct. Sending an outbound message is a final approval action in an approval process.** |
| D. CALL APEX. | Incorrect. This is not a final approval action in an approval process. |

## Exam Topic Flashcards

These flashcards cover workflows and automation. Use these interactive flashcards to brush up on some of the key topics you'll find on this part of the exam.

Read the question or term on each card, then click on the card to reveal the correct answer. Click the right-facing arrow to move to the next card, and the left facing arrow to return to the previous card.

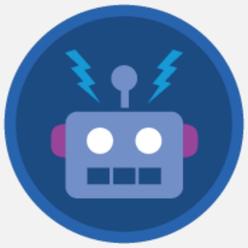
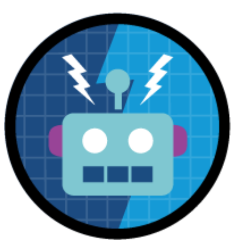
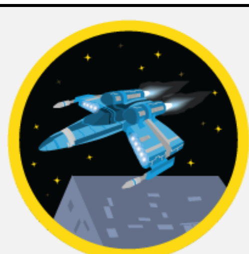
| Question/Term | Answer/Definition |
|---|---|
| **Ursa Major Solar wants to assign a task automatically to account managers when a customer's agreement is about to expire.**<br><br>**How should an administrator configure this functionality?** | Create a time-based workflow on account with a rule criteria of Agreement End Date > TODAY(). |
| **An administrator created a workflow rule that sends email alerts when a case with a high priority is created. A new support engineer who works remotely at Ursa Major Solar complains about not receiving the email alerts. All other users at Ursa Major Solar receive these email alerts.**<br><br>**How can an administrator troubleshoot this issue?** | Verify the user's email address. |

| | |
|---|---|
| **Ursa Major Solar wants to create a workflow rule to send an email alert to members of its board of directors, none of whom use Salesforce.**<br><br>**How many of the board members can be added to a single email alert?** | Up to 5 additional email addresses can be added to the email alert. |
| **Flow** | A flow is an application that can execute logic, interact with the Salesforce database, call Apex classes, and collect data from users. |
| **Quick Action** | Quick actions can be object-specific or global actions. Only Create, Update, and Log a Call actions are supported. You can also use actions in a process, and can only set values for fields that are part of the action’s layout. |
| **Process Trigger** | Every process includes a trigger, which tells the process when to start. How you configure that trigger depends on what type of process you’re creating—record change, event, invokable. |

| | |
|---|---|
| **Approval process** | An approval process automates how records are approved in Salesforce. An approval process specifies each step of approval, including from whom to request approval and what to do at each point of the process. |
| **Delete an Approval Process** | Before you delete an approval process, make sure it's inactive. Delete pending approval requests that are associated with it, and remove them from the recycle bin. |
| **Activate an Approval Process** | An approval process must have at least one step before you can activate it. After an approval process is activated, you can't add, delete, or change the order of the steps, or change its reject or skip behavior, even if the process is inactive. |

## Related Badges

Looking for more information? Explore these related badges.

| Badge | Content Type |
|---|---|
|  Lightning Flow | Module |
|  Automate Business Processes for a Recruiting App | Project |
|   Build a Discount Approval Process | Project |
|  Quick Start: Process Builder | Project |
|  Build a Battle Station App | Project |

# Administrator Certification Prep: Reporting and Automation

Congratulations. You've covered over 20% of the Administrator Certification test material in this badge. You are well on your way.

You've reviewed these sections.

- Reports and dashboards
- Workflow and automation

Be sure to review the other three Administrator Certification Prep badges. Good luck on your exam!