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ABOUT ME

My name is Mike Wheeler, and I am the founder of [Mike Wheeler Media](#). I have been working on the Salesforce platform since 2012 and have taught hundreds of thousands of students how to do the same, since 2016.

ABOUT THIS CHECKLIST

This *Salesforce Self-Assessment Checklist* is focused on the Salesforce Certified Administrator Exam. I have spent countless hours dissecting the [Exam Guide Outline](#) for the Administrator Exam.

In the following pages, you will find the checklist divided into the various Knowledge Areas of the Exam Guide. I have also included the weighting of each Knowledge Area for your reference.

Moving left-to-right across the different column headers in the checklist, you will also see 'KA #' and 'Tot. #' referenced. These are the number of topics in the current Knowledge Area and in total, respectively.

Next you will see the 'Topic' column. Each topic is hyperlinked, which you can click on to go to the Salesforce online help for that particular topic.

Finally, the 'Know?' column is to be checked if you feel confident that you know and understand that particular topic.

HOW TO SCORE YOURSELF

Go through the checklist and count the number of checkmarks for the topics that you feel confident that you understand. (TIP – If you have to click the help article to even understand what that topic is, you likely shouldn't check it.)

WASH, RINSE, REPEAT

I highly recommend that you complete this checklist weekly (or monthly) during your learning journey to measure your progress. This checklist will quickly help you focus on your weak areas that need improvement.

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Knowledge Area & Weighting	KA #	Tot. #	Topic	Know?
Organization Setup (3%)	1	1	Fiscal Year Settings and Options	<input type="checkbox"/>
	2	2	Business Hours	<input type="checkbox"/>
	3	3	Enabling Multiple Currencies and Setting Up Dated Exchange Rates	<input type="checkbox"/>
	4	4	Default Settings (Local, Language and Time Zone)	<input type="checkbox"/>
	5	5	User Interface Settings	<input type="checkbox"/>
	6	6	Search Settings	<input type="checkbox"/>
	7	7	List Views (creating, filtering, pinning, kanban view,)	<input type="checkbox"/>
	8	8	Homepage Layouts (Default Home Page, App and Profile Home Page Combinations)	<input type="checkbox"/>
User Setup (7%)	1	9	Assigning a Salesforce License to a User	<input type="checkbox"/>
	2	10	Resetting User Password	<input type="checkbox"/>
	3	11	Resolving Locked User Accounts	<input type="checkbox"/>
	4	12	Implications of Activating a User	<input type="checkbox"/>
	5	13	Implications of Deactivating a User	<input type="checkbox"/>
	6	14	Implications of Freezing a User	<input type="checkbox"/>
Security and Access (13%)	1	15	Setting an Organization's Password Policies	<input type="checkbox"/>
	2	16	IP Restrictions	<input type="checkbox"/>
	3	17	Identity Confirmation (renamed Device Activation in Spring '21 release)	<input type="checkbox"/>
	4	18	Network Settings	<input type="checkbox"/>
	5	19	Organization Wide Defaults	<input type="checkbox"/>
	6	20	Roles and the Role Hierarchy	<input type="checkbox"/>
	7	21	Manual Sharing	<input type="checkbox"/>
	8	22	Sharing Rules	<input type="checkbox"/>
	9	23	Public Groups	<input type="checkbox"/>

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Security and Access (CONT. 13%)	10	24	Custom Profile	<input type="checkbox"/>
	11	25	Permission Set	<input type="checkbox"/>
	12	26	Profile Settings	<input type="checkbox"/>
	13	27	Profile Permissions	<input type="checkbox"/>
	14	28	How folders can be used to organize and secure communication templates	<input type="checkbox"/>
	15	29	How folders can be used to organize and secure dashboards	<input type="checkbox"/>
	16	30	How folders can be used to organize and secure reports	<input type="checkbox"/>
Standard and Custom Objects (14%)	1	31	Standard Object Architecture	<input type="checkbox"/>
	2	32	Relationship Model	<input type="checkbox"/>
	3	33	Create Fields	<input type="checkbox"/>
	4	34	Edit / Customize Fields	<input type="checkbox"/>
	5	35	Page Layouts for Standard and Custom Objects	<input type="checkbox"/>
	6	36	Understand the implications of deleting fields	<input type="checkbox"/>
	7	37	Create and Assign Page Layouts	<input type="checkbox"/>
	8	38	Create and Assign Record Types	<input type="checkbox"/>
	9	39	Create Business Processes for Standard Objects and Custom Objects	<input type="checkbox"/>
Sales and Marketing Applications (14%)	1	40	Capabilities and Implications of the Sales Process	<input type="checkbox"/>
	2	41	Sales Productivity Features Using Opportunity Tools	<input type="checkbox"/>
	3	42	When Products Should Be Used	<input type="checkbox"/>
	4	43	When Price Books Should Be Used	<input type="checkbox"/>
	5	44	Capabilities of Lead Automation Tools	<input type="checkbox"/>
	6	45	Capabilities of Campaign Management	<input type="checkbox"/>
	7	46	Capability of Salesforce Content	<input type="checkbox"/>
Service and Support Applications (13%)	1	47	Capabilities of Case Processes	<input type="checkbox"/>
	2	48	Capabilities of Case Settings	<input type="checkbox"/>
	3	49	Case Comments	<input type="checkbox"/>

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Service and Support Applications (CONT. 13%)	4	50	Case Assignments	<input type="checkbox"/>
	5	51	Case Auto-Response	<input type="checkbox"/>
	6	52	Case Escalation	<input type="checkbox"/>
	7	53	Web-to-Case	<input type="checkbox"/>
	8	54	Email-to-Case	<input type="checkbox"/>
	9	55	Case Teams	<input type="checkbox"/>
	10	56	Capabilities of Salesforce Knowledge	<input type="checkbox"/>
	11	57	Capabilities of Salesforce Communities	<input type="checkbox"/>
Activity Management and Collaboration (3%)	1	58	Manage Tasks	<input type="checkbox"/>
	2	59	Events	<input type="checkbox"/>
	3	60	Public Calendars	<input type="checkbox"/>
	4	61	Multi-Day Events	<input type="checkbox"/>
	5	62	Chatter Feed	<input type="checkbox"/>
	6	63	Chatter Groups	<input type="checkbox"/>
	7	64	Following in Chatter	<input type="checkbox"/>
	8	65	Chatter Security Features	<input type="checkbox"/>
Data Management (10%)	1	66	Considerations when importing, updating and mass deleting data	<input type="checkbox"/>
	2	67	Data Quality	<input type="checkbox"/>
	3	68	Field Mapping	<input type="checkbox"/>
	4	69	Record IDs	<input type="checkbox"/>
	5	70	External IDs	<input type="checkbox"/>
	6	71	Duplicate Records	<input type="checkbox"/>
	7	72	Data Loader	<input type="checkbox"/>
	8	73	Data Import Wizard	<input type="checkbox"/>
	9	74	Capabilities and Implications of Data Validation Tools	<input type="checkbox"/>
	10	75	Data Export Service	<input type="checkbox"/>
	11	76	How to back up data using Dataloader	<input type="checkbox"/>

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Analytics - Reports & Dashboards (10%)	1	77	Types of Reports	<input type="checkbox"/>
	2	78	Report Formats	<input type="checkbox"/>
	3	79	Report Fields	<input type="checkbox"/>
	4	80	Summarizing Data in Reports	<input type="checkbox"/>
	5	81	Filtering Data in Reports	<input type="checkbox"/>
	6	82	Adding Charts to a Report	<input type="checkbox"/>
	7	83	Scheduling a Report	<input type="checkbox"/>
	8	84	Conditional Highlighting in a Report	<input type="checkbox"/>
	9	85	Sharing Model Impact on Reports	<input type="checkbox"/>
	10	86	Dashboard Components	<input type="checkbox"/>
	11	87	Data Sources for Dashboards	<input type="checkbox"/>
	12	88	Dashboard Chart Types	<input type="checkbox"/>
	13	89	Subscribing to Dashboards	<input type="checkbox"/>
	14	90	Dashboard Running User / Dynamic Dashboards	<input type="checkbox"/>
	15	91	Custom Report Types	<input type="checkbox"/>
Workflow/Process Automation (8%)	1	92	Capabilities of Workflow Rules and Actions	<input type="checkbox"/>
	2	93	Capabilities of Processes (Process Builder)	<input type="checkbox"/>
	3	94	Capabilities and Use Cases for Approval Processes	<input type="checkbox"/>
Desktop and Mobile Administration (3%)	1	95	Capabilities of the Salesforce Mobile App	<input type="checkbox"/>
	2	96	Installation and Synchronization Options of Salesforce Lightning for Outlook	<input type="checkbox"/>
AppExchange (2%)	1	97	Use Cases for AppExchange applications	<input type="checkbox"/>