20 Essential Life Hacks

Every Salesforce Admin Should Know

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Introduction

As a Salesforce admin, there are hundreds of tips, tricks and hacks that can keep you at the top of your game. Regardless of tenure, whether you've been in the role for fifteen years or fifteen months, you're the type of person who looks for the most efficient solution and is always optimizing for success. So which tips are the most important?

Truth is, there are an unlimited number of ways to become better at what you already do. And mastering your skills will not only benefit your career, but will also benefit the organizations you work with. The trick is knowing the right hacks to continuing your success.

As a Salesforce affiliated business with over 10 years of experience working with Salesforce admins, we've nailed down three focus areas to help you master your craft:

- **Career Insights**

- **Salesforce Tips**

- **Productivity Hacks**

One thing we've learned over the years is that every Salesforce admin has a different career path. Whatever path led you to becoming an admin, we've found that you all inherently share several commonalities that make you successful:

1. **Solid IT knowledge or experience**

2. **A knack for puzzle solving**

3. **A predisposition to details**

These traits likely helped you land your start as a Salesforce admin, and have probably made you successful. But what's the most important skill a Salesforce admin can have? How can you stay ahead of the pack?

The following pages offer advice, tips and hacks gathered from seasoned admins that answer these questions and more.

Career Insights

Whether your career is just beginning or you've been at it for 20+ years, the best way to continue growing in your career path is to never close the door on learning. The number of opportunities available to increase your Salesforce knowledge continues to grow — here are a few we hear the most:

1. Complete On-The-Job Training

Beyond getting certified as a Salesforce admin, the true test of knowledge often comes from hands-on experience. There are almost always at least two or more ways to do something in Salesforce, so completing on-the-job training gives you more practice at performing tasks multiple ways.

2. Don't Forget Trailhead Trainings

As an admin you likely know that Salesforce Trailhead trainings are an invaluable opportunity. Why? Trailheads help you get your hands dirty. These gamified assessments give you new skills while helping you improve and hone your current ones. Trailheads are fun, free and a must for growing your skillset and overall career.

3. Find A Mentor

No matter how experienced you are as a Salesforce admin, there will always be someone with more technical knowledge or who thinks about solving problems differently than you do. Take advantage of these resources by finding a mentor inside your organization (or out of it) to learn from and challenge your thinking.

4. Join A User Group

Another key way to help bolster your career path as an admin is to join a user group. User groups can be online or local and vary from student led to industry specific and everything in between. Most metropolitan cities have user groups that host events where Salesforce admins, developers and architects can connect with one another and discuss the latest updates with Salesforce. These groups offer multiple levels of networking, learning and mentoring opportunities. Find a group that fits your interests here: Salesforce Featured Groups

5. Build Your Admin Network

When looking for ways to grow your career as an admin, some people tend to overlook the importance of growing a peer network of other admins. Because Salesforce admins come from varied backgrounds, there's much you can learn from one another. Don't pass up a chance to deep dive into issues with other admins and see their approach. You'll likely learn something new. Build your network by getting active on social media (there are tons of users following @SalesforceAdmns on Twitter), join a LinkedIn Group or plan virtual coffee dates with admins you met at user groups and conferences like Dreamforce.

6. Attend Dreamforce

Speaking of Dreamforce, as an admin you've definitely heard of Salesforce's annual Dreamforce conference. It's like a family reunion, but better. With over two thousand different breakout sessions and unlimited networking opportunities, Dreamforce connects Salesforce admins of all levels with paths to grow in your career. Having trouble convincing your team or getting the budget to attend? Check out this great resource from the Salesforce archives that can help you convince any naysayers.

Pro Tip:

Set a quarterly goal to get yourself outside of your comfort zone and meet at least one new person (virtually or in person) in the Salesforce community. The benefits of expanding your network extend far beyond the office.

7. Keep Certifications Up To Date

Certifications are more than just something fancy to put on your resume, so if you've done the work and have the proper experience, make sure you get certified and stay certified. Once you are certified, stay up to date and don't let it lapse.

*Note: If you're new to being certified, keep in mind you don't immediately lose your certification if it lapses. You have two more releases to get your certification renewed.

8. Practice, Practice, Practice

If you're wanting to take the leap into more technical work and grow in your career, there's no secret formula. The biggest hack to progressing? Hours, commitment and goal setting. Practice your skills in a personal sandbox where you can log in and experiment with things. One of the greatest benefits Salesforce offers is providing a free Developer Edition for anyone to experiment, train and practice in. Sign up here for your Free Salesforce Developer Edition and start experimenting today.
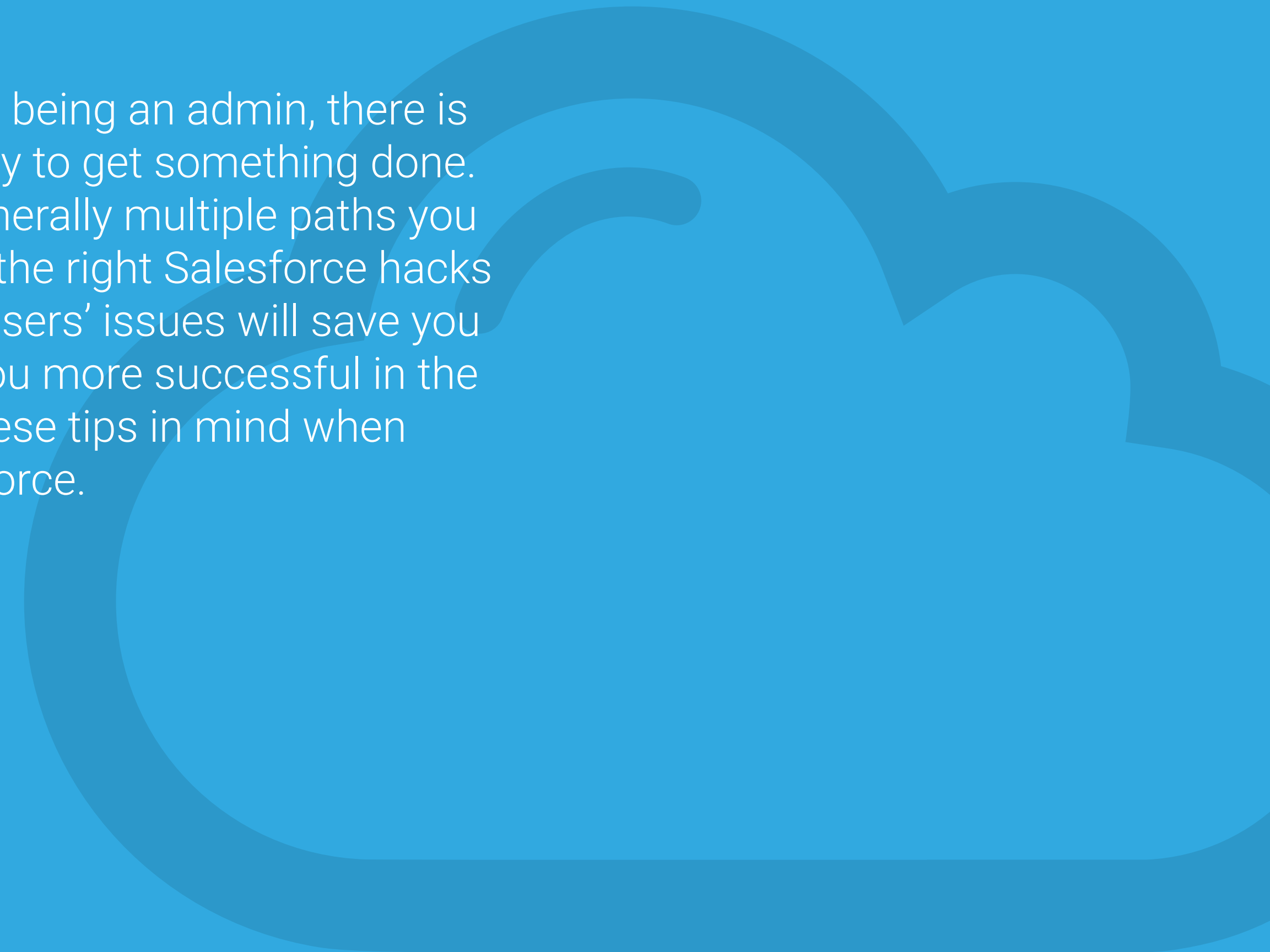
Pro Tip:

Try to get a few projects under your belt before sitting for your certification. This will ensure you're ready to maximize that certification and you'll have a better foundation for passing the exam.

Salesforce Tips

When it comes to being an admin, there is never just one way to get something done. In fact, there's generally multiple paths you can take. Having the right Salesforce hacks as you solve for users' issues will save you time and make you more successful in the long run. Keep these tips in mind when working in Salesforce.

9. Stay Current On Release Notes

Three times a year Salesforce introduces a new set of [release notes](). Staying current on release notes ensures that you stay up to date with new features. Following the release notes and taking the most recent maintenance exam every release cycle (at least three times a year) keeps you current (and certified) with what's new in Salesforce.

10. Solve Problems Multiple Ways

As we've mentioned before, there's never just one way to do things in Salesforce, there's several. Be sure to learn multiple ways to do things because eventually you'll rely on those options for efficiency. Some projects may be better suited for using one workflow, while the next is better off with another workflow. It all depends on the project details and what you're trying to accomplish. The key is to always default to the most efficient and maintainable way of doing things.

11. Let Google Be Your Friend

Because Salesforce has been an established platform for quite some time, there's likely been a user who has experienced and solved the puzzle you are trying to figure out. Relying on sources like Google to research common issues will actually increase your efficiency and help you reach a resolution faster. "Just Google it" may seem like a simple hack, but it is often overlooked. Next time you've hit a wall with an issue, try searching online for a quick solution. Google Search, Salesforce help documentation and the [Trailblazer Community forum]() are extremely well indexed for answering tricky questions.

12. Use Bookmarks

Speaking of finding solutions quickly, you don't have to reinvent the wheel every time! If you come across a resource that solves a problem you frequently run into in a community group or online elsewhere, bookmark it. Flagging significant information to refer back to is a hack you'll thank yourself for later. Common resources to bookmark:

- **Your most frequented tabs**

- **Dashboards/reports that you check daily**

- **Community forums you read**

- **Different dev or sandbox orgs for easy access**

13. Back Up!

Curious what the number one Salesforce tip every admin should do is? Back up, back up, back up. When dealing with data, always back up in multiple places. Whether it's Dataloader, Excel, Notepad, screenshots or a paid full service back-up solution, always make sure your data is backed up securely. Another tip is to grab a quick screenshot even when you're doing minor updates like modifying page layouts, fields or related lists. This way you can easily refer back to how it was set up previously should anything happen. The second most important hack is to ALWAYS make changes in a sandbox first before making changes to production orgs. Finally, never delete data until you are certain you have a backup of what you want to delete. If you follow these tips, you will have multiple ways to recover should something go wrong.

Productivity Hacks

No matter how many Salesforce certifications and Trailheads you have under your belt, solving for efficiency is crucial as an admin. Your goal as an admin should be to save your users time, so you should always be utilizing the best productivity hacks. You can be more proactive about solving issues by using the following productivity hacks in your workflows.

14. Keep track of projects

As a Salesforce admin it's crucial to track the multiple projects you're working on - whether it's a big internal overhaul or something more simple like adding a step in process builder, you'll want to make sure you have autonomy over your to-do list. This will help ensure nothing falls through the cracks. Whether it's a digital tracking tool like Trello (it's one of our favorites and it's free!), the Tasks object in Salesforce, or a whiteboard near your desk, find a path that works well for you. Tracking projects efficiently means being able to see immediate updates at a glance and manage what's on your plate.

15. Use Internal Messaging Channels

Quick and easy communication platforms make Salesforce admins' jobs run more smoothly. External platforms like Slack or internal Salesforce collaboration solutions such as Chatter serve as excellent tools to pass information between users. Try setting up an @admins Chatter group so a user can easily mention the admins on a specific issue or request. Be sure to implement a priority case log to prioritize those requests, for example, does a sales rep have a workflow suggestion? Do they need a new data field added? Did an iframe disappear from their view? These simple everyday 'issues' that users encounter can clog the strategic projects admins are brought in to execute.

Implementing a system that helps prioritize incoming requests can help keep your team focused on what matters and solve problems in the right order.

16. Automate wherever you can

Adding automation tools to your workflow is the ultimate hack because it saves time, reduces errors and helps your users become more self-sufficient. Isn't that every Salesforce admin's goal? Consider using a document automation solution to alleviate those tedious documents no one enjoys pulling together. S-Docs, for example, is a useful document generation and e-signature solution that enables users to create documents with the click of a button and electronically sign them in seconds. By implementing a solution like S-Docs, you'll not only save time and limit frustrations, but your users will be more self-sufficient and you'll have more time to focus on bigger projects.

17. Troubleshooting Best Practices

Noticing a slow Salesforce or glitches in your system? Salesforce is good about reporting issues.The first place you should go is trust.salesforce.com to check your Salesforce Instance or POD. A "POD" refers to a group of 10,000 customers together in what Salesforce calls a Point of Deployment. This is a self-contained unit and each user is allocated to one and only one POD.

Next, check to see if other users are having the same issue and see if you're able to replicate the problem. A good troubleshooting step is to determine if the issue is isolated to a specific browser. Try replicating the issue on a different browser. If the issue does not occur then you can conclude the issue has to do with the browser. At the same time, if the issue persists try one of these troubleshooting resources:

- **Google it - really!**

- **Check Salesforce Help for articles related to your specific issue**

- **Test, test, test in your sandbox**

- **Inquire with your user group online**

18. Keyboard Shortcuts

Shortcuts by definition are an accelerated way of doing something, which can save you time in the long run. Use keyboard shortcuts for your most used functions to maximize your efficiency as an admin. Here are the most used shortcuts that every admin should know:

Copy:
Ctrl + C

Cut:
Ctrl + X

Paste:
Ctrl + V

Open link in new tab:
Ctrl + Click Link

Quickly switch between open windows:
Alt + Tab

Find/search any text:
Ctrl + F

Accidentally close a tab? Re-open immediately with:
Ctrl +Shift + T

Increase or decrease screen size:
Ctrl + + or -

The Universal Truth About Salesforce Admins

Sure, we're all different from one another. But the more Salesforce admins we talked to, we began to see two common themes emerge that appear to be true for everyone — which we know is a big piece of what makes a great admin.

19. Tap Into Your Puzzle Solving Skills

Salesforce admins are puzzle solvers by nature and have a knack for getting to the root of issues quickly. You get requests or complaints from users all the time, some of which may not be accurately described. Be the puzzle solver you were born to be. Ask leading questions to get the root of the problem, which will ultimately save your organization time and headaches.

20. Look At The Whole Landscape, And The Small Picture

Your technical background will always be the backbone of your career as a Salesforce admin. But it's your aptitude to solve issues in a way that has the greatest impact on your organization that makes you successful in your role. As the Salesforce guru in your organization, it's your job to understand how each object relates to one another and how something as simple as updating a field will impact the user, the workflow and ultimately the organization. The ability to clearly see the ripple effect of each action at a granular, isolated level while maintaining the overarching operational view is what catapults you into that next level of being a trusted resource for your organization.

Summing It Up

Whether you've been in your career for fifteen years or fifteen months, there's always room to grow. Use this guide to equip yourself with the necessary hacks to crush it as a Salesforce admin (or continue to crush it, as we know you're already doing). Learning opportunities within the Salesforce ecosystem are endless, so take advantage of all you can and you'll be well on your way to reaching new heights in your career.

Actionable Takeaways

Start blazing your admin trail and making waves in your organization with this printable checklist.

☐ Attend Dreamforce

☐ Perform on-the-job training

☐ Complete new Trailhead trainings

☐ Find a mentor

☐ Join a user group

☐ Build your network of admins

☐ Don't let certifications lapse

☐ Practice, practice, practice

☐ Stay current on release notes

☐ Solve problems multiple ways

☐ Use Google

☐ Bookmark knowledge resources

☐ Back up!

☐ Track your projects

☐ Use internal messaging channels

☐ Know keyboard shortcuts

☐ Troubleshoot

☐ Automate wherever you can

☐ Puzzle solve

☐ See how the small details fit into the whole landscape

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