



Certification Exam Guide

# SALESFORCE CERTIFIED SHARING AND VISIBILITY DESIGNER

Spring '18

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## ABOUT THE SALESFORCE CERTIFIED SHARING AND VISIBILITY DESIGNER CREDENTIAL

A Salesforce Certified Sharing and Visibility Designer credential is created for architects, analysts, and administrators who want to demonstrate their knowledge, skills, and abilities to design secure, scalable security models on the Lightning Platform. A Salesforce Certified Sharing and Visibility Designer should be able to communicate technical solutions to technical stakeholders and provide a project delivery framework that ensures quality and meets business requirements.

Here are examples of concepts you should know in order to pass the exam:

- Design a security and sharing model within Salesforce based on complex requirements.
- Articulate system design considerations, benefits, tradeoffs, and recommendations for a security and sharing model.
- Use best practices and know which standard Salesforce functionality to use when designing to complex requirements.

## SECTION 1. PURPOSE OF THIS EXAM GUIDE

This Exam Guide is designed to help candidates evaluate their readiness to pass the Salesforce Certified Sharing and Visibility Designer exam. This guide provides information about the target audience for the certification exam, recommended training and documentation, and a complete list of exam objectives - all with the intent of helping candidates achieve a passing score. Salesforce highly recommends a combination of on-the-job experience, and self-study to maximize the likelihood of passing the exam.

## SECTION 2. AUDIENCE DESCRIPTION: SALESFORCE CERTIFIED SHARING AND VISIBILITY DESIGNER

A Salesforce Certified Sharing and Visibility Designer assesses the security and sharing requirements necessary to design secure, scalable solutions on the Salesforce platform. The designer has experience designing and implementing complex security and sharing models; as well as communicating the solution and design trade-offs to business and technical stakeholders alike.

The Salesforce Certified Sharing and Visibility Designer has the following background:

- Two to three years with Salesforce technology
- Four to five years managing sensitive data in an enterprise environment
- Experience with security methods and data policies that support the handling of sensitive data

Typical job roles may include:

- Advanced Administrator
- Technical Architect
- Solution Architect
- Advanced Business Analyst

The Salesforce Certified Sharing and Visibility Designer candidate has the experience, skills, knowledge, and ability to:

- Describe the usage and implementation of sharing rules, both criteria based and ownership based.
- Architect the appropriate object relationships given a scenario.
- Articulate how Org-Wide defaults may impact a security model.
- Articulate how different Salesforce license types may impact a security & sharing model.
- Describe how the Role Hierarchy may impact the decisions made when designing a security model.
- Describe how Profile configuration may impact a security and sharing model.
- Describe the fundamental concepts around role hierarchy, apex sharing etc. to different levels of audience.
- Articulate different security capabilities with respect to record visibility, CRUD based security, record level access and the differences between the three.

- Describe the limits of declarative capabilities and when a more custom security solution is required with associated risks and limitations.
- Articulate what Apex Sharing is and when it should be used.
- Articulate the security implications of using Dashboards, Apex run as an Administrator, VisualForce pages or other "run in context" tools to expose aggregate data.
- Identify and mitigate performance and scalability concerns for a recommended solution.
- Develop a test process to validate a security model.
- Articulate use cases for complex sharing such as territory management or account teams should be used.

A candidate for this exam will likely need assistance with the following:

- Designing and implement a tokenization strategy.
- Identifying off platform data security considerations.
- Determining non-core platform data security considerations (E.g. AppExchange) and other Salesforce products (E.g. Heroku).
- Describing how specific security constructs work (E.g. SSL, RSA).
- Identifying common use-cases for requirements gathering.
- Determining performance issues and scalability of large data sets with sharing.
- Determining what types of sharing are impacted in an LDV scenario.
- Determining security requirements around certain kinds of data: PCI, PII, HIPPA, etc.
- Articulating security concepts such as Least Privilege, Defense in Depth, and Failure Securely.
- Implementing project and development lifecycle methodologies.
- Defining identity management and SSO architecture.

A candidate for this exam is not expected to know:

- Complex Role Hierarchy Design
- Measuring/Predicting LDV impacts on security Design
- Documenting/gathering legal requirements around sensitive data
- Org merge security design
- Creation of test plan for security design

## SECTION 3. ABOUT THE EXAM

The Salesforce Certified Sharing and Visibility Designer exam has the following characteristics:

- Content: 60 multiple-choice/multiple-select questions\* (5 unscored questions will be added)
- Time allotted to complete the exam: 120 minutes (time allows for unscored questions)
- Passing Score: 68%
- Registration fee: USD 400, plus applicable taxes as required per local law
- Retake fee: USD 200, plus applicable taxes as required per local law
- Delivery options: Proctored exam delivered onsite at a testing center or in an online proctored environment. Click [here](#) for information in scheduling an exam.
- References: No hard-copy or online materials may be referenced during the exam.
- Prerequisite: None

\*Please note that as of November 16, 2017, all Salesforce certification exams will contain five additional, randomly placed, unscored questions to gather data on question performance. The duration of each exam has been evaluated and adjusted to accommodate the inclusion of the unscored questions. These five questions will be in addition to the 60 scored questions on your exam, and will have no impact whatsoever on your score.

## SECTION 4. RECOMMENDED TRAINING AND REFERENCES

As preparation for this exam, Salesforce recommends a combination of: hands-on experience, training course completion, Trailhead trails, and self-study in the areas listed in the Exam Outline section of this exam guide.

To access the most comprehensive training list, download a copy of our Salesforce Guide to Certification available [here](#).

To enroll in instructor-led courses and launch online training from your Salesforce application, click the **Help & Training** link in the upper right corner of the screen (requires login) and search for the desired courses. Non-Salesforce customers can register for instructor-led courses [here](#).

To review online Documentation, Tip Sheets, and User Guides – search for the topics listed in the Exam Outline section of the exam guide and study the information related to those topics. Documentation, Tip Sheets, and User Guides can also be accessed through **Help & Training**.

### TRAILHEAD TRAILMIX

Check out the official [Certification Trailmix](#) for this credential. We have included essential Trailhead learning specifically with you in mind.



## SECTION 5. EXAM OUTLINE

The Salesforce Certified Sharing and Visibility Designer exam measures a candidate's knowledge and skills related to the following objectives. A candidate should have hands-on experience with Integration Architecture application and demonstrate the knowledge and expertise in each of the areas below.

### DECLARATIVE SHARING

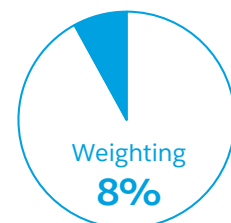
- Given a particular customer scenario, describe the appropriate use and limitations of relevant object and field level security settings needed to allow and limit user's access to different types of information.
- Given a particular customer scenario, describe the relevant settings required for all the declarative platform security features that would ensure proper data access to relevant users.
- Demonstrate your ability to properly evaluate the use case for and implement Account and Opportunity Teams to ensure the proper visibility and collaboration requirements are met.
- Demonstrate how views and folders can be segmented for different groups using out of box security features, such as groups or roles, in an effective manner while keeping in mind security considerations and how these differ from record level security considerations.
- Given a particular customer's organization hierarchy describe the impact of role hierarchy on record sharing.
- Given a scenario that involves external users, describe how the security and sharing setup can be utilized to properly enforce record visibility for different types of community users (e.g. Internal, Customer Community, and Partner Community).
- Given a particular customer scenario, have awareness of how Territory Management 2.0 can (or cannot be applied) to resolve more complex security requirements.
- Given a customer's particular data storage and data residency requirements, have awareness of solution options in the marketplace that properly leverages declarative and programmatic security features of Salesforce.
- Given an Architect's design and configuration of the sharing and security model, describe the methods of validating the sharing and visibility.




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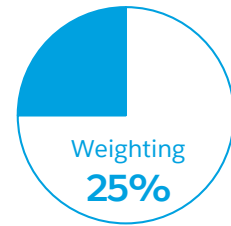
### PERFORMANCE

- Given a particular complex customer org setup, describe how apex sharing (and calculation) can impact system performance.
- Given a particular complex customer org setup, design a security model that is maintainable at large numbers of users and records.



## PROGRAMMATIC SHARING

- Given a scenario, design a solution that leverages programmatic sharing functionalities to achieve a requirement that cannot be met using declarative functionality.
  - Given a scenario, describe how to minimize security risks in programmatic customizations (Apex and Visualforce) relative to data visibility.
  - Demonstrate how to properly design unit tests to verify programmatic security solutions.
  - Demonstrate how to properly enforce Object and Field level permission when designing Programmatic Solutions.
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## SECTION 6. SAMPLE EXAM QUESTIONS

The following questions are representative of those on the Salesforce Certified Sharing and Visibility Designer exam. These questions are *not* designed to test your readiness to successfully complete the certification exam, but should be used to become familiar with the types of questions on the exam. The actual exam questions may be more or less difficult than this set of questions.

1. A remote user is complaining that they can't see a certain account when they run a particular Private Account List View that they created for themselves. How might a System Administrator assist in troubleshooting this issue?

*Choose one answer*

- A. VPN to the User's location and establish a remote desktop session.
  - B. Have the User send the List View link URL via email and investigate.
  - C. Use the Login As feature to see what the User is seeing in her login.
  - D. Temporarily make the user a System Administrator so she can fix the issue.
2. Universal Containers has created a custom Sales Operations profile with read and edit access to the Category field on a custom object. There is a new requirement that 3 of the 100 users assigned to the Sales Operations Profile should have read-only access to the Category field.

How can the Architect support this request?

*Choose one answer*

- A. Create a permission set in the Category field to read-only and assign it to the users.
- B. Create a new profile without edit access to Category and assign it to the users.
- C. Create a new page layout with the Category Field set to read-only for these users.
- D. Create a custom permission to grant read-only access to Category and assign it to the users.

3. At Universal Containers, the Sales VP likes to re-assign Opportunity Teams every six months. Each Opportunity Team has the following resources:
- AE (owner)
  - Sales Engineer
  - Vertical Overlay
  - Sales Ops

What should the Architect use to re-assign Opportunity Team members so they have access to the appropriate Opportunity records?

*Choose one answer*

- A. From the User Setup menu, click "Update Team members on open Opportunities."
  - B. Build a Visualforce page that will query the default team and update open Opportunities.
  - C. From the Opportunity record detail page, use the "Update Team Members" function.
  - D. Use the Mass Reassign Opportunity Team wizard on the Opportunity Tab Home Page.
4. Universal Containers has successfully implemented a large Service Cloud rollout for their national call center 3 months ago. One of their largest customer accounts, United Automotive, has over 15,000 open cases. Agents are now having trouble opening new cases for United Automotive. When they try to create a case, the following Error message appears for them:

UNABLE\_TO\_LOCK\_ROW

They notice that this only occurs for the United Automotive account. If they try to save the case again it will usually work, but the problem seems to be happening more and more often.

What option should the Architect recommend?

*Choose one answer*

- A. Review all Account sharing rules to ensure that the Customer Service team has Read/Write access to the United Automotive Account.
- B. Review the Account structure to split the United Automotive account into multiple branch accounts.
- C. Review all Case Sharing Rules and consolidate where appropriate to reduce the total number of sharing rules.
- D. Review the Customer Service Profile to ensure that they have Read/Write access to the appropriate Case and Account Fields.

5. Which two license types can be assigned the permissions to create and edit reports?

*Choose two answers*

- A. Customer Community Plus
- B. Customer Community
- C. Customer Community Plus Login
- D. Partner Community Plus Login

## SECTION 7. ANSWERS TO SAMPLE EXAM QUESTIONS

1. C
2. B
3. D
4. B
5. A, C

## SECTION 8. MAINTAINING A CERTIFICATION

One of the benefits of holding a Salesforce credential is always being up to date on new product releases. Our release exams are designed to ensure you have the latest information you need to be a successful Salesforce Certified expert.

Bookmark these useful resources for maintaining your credentials:

- [Maintenance Exam Due Dates](#)
- [Credential Status Request Overview](#)
- [Overall Maintenance Requirements](#)

**Don't let your hard-earned credential expire!** Once you earn the credential, if you do not complete all maintenance requirements by the due date, your credential will expire, or in some cases, become suspended. For more information, click [here](#).

### ABOUT TRAILHEAD

Trailhead is your path into the Salesforce economy. It's the fun way to learn the skills you need to transform your company, earn credentials that grow your career, and connect with a global movement of Trailblazers to continue learning together.

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The fun way to  
learn Salesforce

#### LEARN

Learn at your own pace, from our experts, and your peers.

#### EARN

Earn points, badges, and skill-based credentials that grow your resume.

#### CONNECT

Connect with fellow Trailblazers to learn, inspire, and blaze new trails.

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