Exam

ADMN-201

Salesforce Certified Platform Administrator

Free demo	30 sample questions
Full exam	148 questions with answers and explanations
Contents	Questions with answers and explanations

Exam domains

Domain	Exam weight	Questions
D1 Configuration and Setup	20%	7
D2 Object Manager and Lightning App Builder	20%	5
D3 Sales and Marketing Applications	12%	3
D4 Service and Support Applications	11%	3
D5 Productivity and Collaboration	7%	1
D6 Data and Analytics Management	14%	4
D7 Workflow/Process Automation	16%	6

This is a free demo from Dumpsgate: 30 of the exam's 148 questions. **Get the full ADMN-201 exam** with every question, answer and explanation.

Question 1

Single choice · Domain: D1 Configuration and Setup › Determine the appropriate administrative settings

A Platform Administrator at Universal Containers is trying to deactivate a user who has left the company but is unable to do so. What is preventing the administrator from deactivating this user?

A. The user is the running user of a dashboard.
B. The user is part of an active case assignment rule.
C. The user is part of an Opportunity team.
D. The user is part of an Account team.

Answer: A. The user is the running user of a dashboard.

Explanation

The user is configured as the running user for a dashboard. Salesforce requires a dashboard's specified running user to remain active, so this configuration prevents the administrator from deactivating the user until the dashboard's running-user setting is changed.

✓ **A** The user is the running user of a dashboard.
This is the blocker in this scenario: a dashboard configured to run as this user depends on that user remaining active. The administrator must change the dashboard's running-user configuration before deactivating the user.

✗ **B** The user is part of an active case assignment rule.
Being included in an active case assignment rule is not the restriction identified here. The dashboard running-user setting is what prevents deactivation.

✗ **C** The user is part of an Opportunity team.
Opportunity team membership is not the deactivation blocker in this scenario. The issue is that the user is configured as a dashboard's running user.

✗ **D** The user is part of an Account team.
Account team membership is not the deactivation blocker in this scenario. The issue is that the user is configured as a dashboard's running user.

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Question 2

Single choice · Domain: D1 Configuration and Setup › Determine the appropriate security controls

The sales reps at Cloud Kicks should be able to report on each other's account and opportunity records with the organization-wide default for Account and Opportunity both set to Private. What should a Platform Administrator do to achieve this?

A. Create an owner-based sharing rule for Accounts with sharing between a Public Group of Sales Reps and Read Only Opportunity Access.

B. Create an Account and Opportunity report to show any owned by each member of the Sales Team and save the report into a shared report folder.

C. Utilize Apex sharing to programmatically share records between a group of Sales Rep users.

D. Create manual sharing to share specific account and opportunity records between the sales reps.

Answer: A. Create an owner-based sharing rule for Accounts with sharing between a Public Group of Sales Reps and Read Only Opportunity Access.

Explanation

With Account and Opportunity organization-wide defaults set to Private, sales reps need record-level access beyond their own records to report on one another's data. An owner-based sharing rule can share records owned by the Sales Reps public group with that group, and the rule can grant Read Only access to the related opportunities. This provides the access needed for reporting without changing the private defaults.

✓ **A** Create an owner-based sharing rule for Accounts with sharing between a Public Group of Sales Reps and Read Only Opportunity Access.
This is the record-sharing mechanism that addresses the private defaults: it shares accounts based on their owners and grants the Sales Reps group access to them. The Read Only Opportunity Access setting also allows the reps to see related opportunities for reporting.

✗ **B** Create an Account and Opportunity report to show any owned by each member of the Sales Team and save the report into a shared report folder.
A shared report folder controls who can access the report, not who can access the underlying account and opportunity records. With both objects set to Private, the report does not by itself give reps access to one another's records.

✗ **C** Utilize Apex sharing to programmatically share records between a group of Sales Rep users.
Apex sharing could be used to create record access, but it is unnecessary for this requirement because an owner-based sharing rule provides a declarative way to share records among the Sales Reps group. The question asks what the administrator should do, and option A directly fits that need.

✗ **D** Create manual sharing to share specific account and opportunity records between the sales reps.
Manual sharing applies to selected individual records and would require repeated, record-by-record sharing as sales reps need access to one another's data. It is not the appropriate scalable approach for sharing records based on ownership across the sales group.

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Question 3

Single choice · Domain: D1 Configuration and Setup › Determine the appropriate setup and maintenance features

There are multiple system administrators at Cloud Kicks that make configuration changes. Which tool gives the system administrators the ability to track these changes?

A. Health Check
B. Setup Audit Trail
C. History Tracking
D. Feed Tracking

Answer: B. Setup Audit Trail

Explanation

Setup Audit Trail records configuration changes made in Salesforce Setup, including who made each change and when. Because multiple administrators are making configuration changes, it lets the team review and attribute those changes.

✗ **A** Health Check
Health Check evaluates security settings against recommended baselines and identifies potential risks. It does not provide a log of configuration changes made by individual administrators.

✓ **B** Setup Audit Trail
Setup Audit Trail records changes made in Setup and identifies the administrator who made each change and when. This makes it the appropriate tool for tracking configuration changes by multiple administrators.

✗ **C** History Tracking
Field History Tracking records changes to selected fields on records, such as changes to an account or opportunity. It is not intended to track changes to the Salesforce configuration made in Setup.

✗ **D** Feed Tracking
Feed Tracking displays selected record changes in a record's feed so users can follow updates. It does not provide an audit log of administrators' configuration changes.

Question 4

Single choice · Domain: D1 Configuration and Setup › Determine the appropriate administrative settings

A Platform Administrator at Cloud Kicks is trying to set up a new user but receives an error about a duplicate username when trying to save the user record. What is causing this error to happen?

A. The username was not configured in the format of an email address.
B. The email address and username must be unique across all Salesforce orgs.
C. The username must be unique across all Salesforce orgs.
D. The username has a restricted domain name within it.

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Answer: C. The username must be unique across all Salesforce orgs.

Explanation

Salesforce usernames must be globally unique across all Salesforce orgs, not just unique within Cloud Kicks' org. The duplicate-username error means the username being assigned is already in use elsewhere, so a different username is required.

✗ **A** The username was not configured in the format of an email address.
A Salesforce username must be formatted like an email address, but that format alone does not prevent a duplicate-username error. The issue described is that the username is already in use, not that it has an invalid format.

✗ **B** The email address and username must be unique across all Salesforce orgs.
The username must be globally unique, but the email address does not have to be unique across all Salesforce orgs. This option incorrectly applies the global uniqueness requirement to both fields.

✓ **C** The username must be unique across all Salesforce orgs.
Salesforce requires each username to be unique across its orgs, not merely within the org where the user is being created. A username already assigned in another Salesforce org can therefore trigger this error.

✗ **D** The username has a restricted domain name within it.
The error is about a duplicate username, which indicates that the username is already in use. A restricted domain is not the cause identified by this scenario.

Question 5

Single choice · Domain: D1 Configuration and Setup › Determine the appropriate administrative settings

Cloud Kicks has been seeing exponential growth and will be hiring an additional 10 sales reps and 15 support reps to its teams. The support team will need access to the Service Console to manage cases.

A Platform Administrator will be assigning the users to existing custom sales and support profiles.

How should the administrator ensure the support reps have the appropriate access to the console?

A. Enable the Service Cloud User feature license for the support reps on the User Detail page.
B. Create a permission set for the Service Console and assign it to the support reps.
C. Build a Service Console using Lightning App Builder for the custom service profile.
D. Assign the Salesforce Platform User License to the support reps.

Answer: A. Enable the Service Cloud User feature license for the support reps on the User Detail page.

Explanation

The support reps need access to the Service Console to manage cases, so the administrator should enable the Service Cloud User feature license for those users. This feature license provides the Service Cloud access required for the console while the users retain their assigned custom support profile. A permission set or building a console does not replace the required feature license.

✓ **A** Enable the Service Cloud User feature license for the support reps on the User Detail page.
The support reps need Service Cloud access to use the Service Console for case management. Enabling the Service Cloud User feature license on each user's details provides that access while they use the existing custom support profile.

✗ **B** Create a permission set for the Service Console and assign it to the support reps.
A permission set can grant permissions, but it does not provide the Service Cloud User feature license required for Service Console access. The scenario calls for enabling that feature license for the support reps.

✗ **C** Build a Service Console using Lightning App Builder for the custom service profile.
The requirement is to give support reps access to the Service Console, not to build or customize a console. Creating a console with Lightning App Builder would not substitute for enabling the required Service Cloud User feature license.

✗ **D** Assign the Salesforce Platform User License to the support reps.
The Salesforce Platform User License is not the feature license needed to access the Service Console. The support reps should use their assigned support profile and have the Service Cloud User feature license enabled.

Question 6

Single choice · Domain: D1 Configuration and Setup › Determine the appropriate security controls

Service reps in a call center do not have assigned desks. They sit at any available desk and use the computer on that desk to access Salesforce. A Platform Administrator has been asked to streamline the login process so the reps do not have to authenticate each time they log in at a different computer. Which function should the administrator use to implement this request?

A. Custom Profile
B. Trusted IP Ranges
C. Multi-factor Authentication
D. Permission Set

Answer: B. Trusted IP Ranges

Explanation

Trusted IP Ranges let the administrator designate the call center's network addresses as trusted. When reps move between desks on that network, Salesforce can avoid additional identity-verification prompts based on the computer change, streamlining their logins.

✗ **A** Custom Profile
A profile controls a user's permissions and settings, not whether Salesforce treats logins from the call center's network as trusted. It would not address the repeated authentication prompts when reps change desks.

✓ **B** Trusted IP Ranges
The administrator can mark the call center's network IP addresses as trusted. Reps using different computers on that network can then avoid additional identity-verification prompts triggered by logging in from an unfamiliar location.

✗ **C** Multi-factor Authentication
Multi-factor authentication adds an authentication step rather than streamlining repeated logins. It does

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not designate the shared call center network as trusted.

✗ **D** Permission Set
A permission set grants additional access to Salesforce features or data. It does not change how Salesforce verifies logins from different computers or locations.

Question 7

Single choice · Domain: D1 Configuration and Setup › Determine the appropriate security controls

A Platform Administrator for Cloud Kicks needs to ensure that only the financial records belonging to each individual user are visible on the report in order to meet scope of the data privacy requirements. How should the administrator achieve this?

A. Set sharing model as Public Read/Write for the respective object(s).
B. Set sharing model as Private for the respective object(s).
C. Create multiple reports, each filtered to show records owned by each user.
D. Use Apex sharing to hide records.

Answer: B. Set sharing model as Private for the respective object(s).

Explanation
Set the object's organization-wide default sharing model to Private. This restricts each user's record access by default to records they own, so a report respects those access boundaries instead of exposing other users' financial records. Additional sharing rules or permissions would need to be configured carefully so they do not broaden access beyond the privacy requirement.

✗ **A** Set sharing model as Public Read/Write for the respective object(s).
Public Read/Write would allow users broad access to records on the object, including records they do not own. That conflicts with the requirement to limit report visibility to each user's own financial records.

✓ **B** Set sharing model as Private for the respective object(s).
Private makes record access restricted by default, so users generally see only records they own unless access is explicitly granted through other sharing mechanisms. Reports honor record-level access, which supports keeping each user's financial records private from other users.

✗ **C** Create multiple reports, each filtered to show records owned by each user.
Report filters are not a reliable security boundary: users with access to the underlying records may be able to view them through other reports or remove or change filters. Record access should be controlled with the object's sharing model, rather than relying on separate filtered reports.

✗ **D** Use Apex sharing to hide records.
Apex sharing is not the appropriate default mechanism for restricting access to each user's records when the object's sharing model can enforce that baseline. It adds custom complexity and does not replace setting the object's organization-wide default to Private.

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Question 8

Multiple choice · Domain: D2 Object Manager and Lightning App Builder › Determine options and considerations when importing and deleting data

A Platform Administrator at Ursa Major Solar imported records into an object by mistake. Which two tools should the administrator use to undo this import?

A. Weekly Data Export
B. Data Loader
C. Data Import Wizard
D. Mass Delete Records

Answer

- B. **Data Loader**
- D. **Mass Delete Records**

Explanation

To undo an accidental import, the administrator needs tools that can remove the imported records. Data Loader supports deleting records, typically by identifying the imported records and supplying their record IDs. Mass Delete Records provides Salesforce's built-in way to delete records in bulk, so B and D are the correct choices.

✗ **A** Weekly Data Export
Weekly Data Export creates an export of Salesforce data for backup or retrieval; it does not delete records that were imported by mistake. It therefore does not undo the import.

✓ **B** Data Loader
Data Loader supports deleting records, so it can remove the accidentally imported records when their IDs are identified and provided for deletion. This makes it an appropriate tool to undo the import.

✗ **C** Data Import Wizard
The Data Import Wizard is used to add or update records, not to delete records that have already been imported. Using it would not reverse the mistaken import.

✓ **D** Mass Delete Records
Mass Delete Records is a Salesforce tool for deleting groups of records. The administrator can use it to remove records created by the mistaken import, making it a valid way to undo the import.

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Question 9

Single choice · Domain: D2 Object Manager and Lightning App Builder › Create, delete, and customize fields and page layouts

What are three characteristics of a master-detail relationship?

A. Each object can have up to five master-detail relationships.
B. Permissions for the detail record are set independently of the master.
C. Roll-up summaries are supported in master-detail relationships.
D. The master object can be a standard or custom object.1
E. The owner field on the detail records is the owner of the master record.2

Answer: C, D, E3

Explanation

C, D, and E describe master-detail relationship characteristics. Master-detail relationships support roll-up summary fields, can use a standard or custom object as the master, and make the detail record's ownership follow the master record. A and B are incorrect because an object can have at most two master-detail relationships, and access to detail records is controlled by the master.

✗ **A** Each object can have up to five master-detail relationships.
An object can have at most two master-detail relationships, not five. Therefore, this is not a characteristic of the relationship.

✗ **B** Permissions for the detail record are set independently of the master.
Access to a detail record is determined by access to its master record rather than being set independently. This is the opposite of how master-detail sharing works.

✓ **C** Roll-up summaries are supported in master-detail relationships.
A master-detail relationship supports roll-up summary fields on the master, which can aggregate values from related detail records. This is a defining capability of the relationship.

✓ **D** The master object can be a standard or custom object.
The master side of a master-detail relationship can be a standard object or a custom object. The relationship is not limited to custom master objects.

✓ **E** The owner field on the detail records is the owner of the master record.
Detail records inherit ownership from their master record, so their owner is the master record's owner. A detail record does not have independently controlled ownership.

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Question 10

Single choice · Domain: D2 Object Manager and Lightning App Builder › Create, delete, and customize fields and page layouts

A salesperson complains that the Log a Call button is missing from the highlights panel of an Opportunity page. What is the reason for this?

A. The Log a Call action will appear within the Activity Component as a standard behavior rather than the highlights panel.

B. The Log a Call action has not been added to the Salesforce Mobile and Lightning Experience Actions section of the page layout.

C. The custom Log a Call permission is missing from the user's profile and assigned permission sets.

D. The custom Log a Call permission has been disabled at the org level in Setup.

Answer: B. The Log a Call action has not been added to the Salesforce Mobile and Lightning Experience Actions section of the page layout.

Explanation

The Log a Call action is controlled by the Opportunity page layout's Salesforce Mobile and Lightning Experience Actions section. If it has not been added there, it may not appear among the record's highlights panel actions. The scenario points to a page-layout configuration issue, not a custom permission.

✗ **A** The Log a Call action will appear within the Activity Component as a standard behavior rather than the highlights panel.
The Activity component can provide activity actions, but that does not mean Log a Call is restricted to the component or cannot appear in the highlights panel. The issue described is addressed by configuring the action on the page layout.

✓ **B** The Log a Call action has not been added to the Salesforce Mobile and Lightning Experience Actions section of the page layout.
The actions available in the highlights panel can depend on the actions configured in this page-layout section. Adding Log a Call there is the relevant configuration when it is missing from the panel.

✗ **C** The custom Log a Call permission is missing from the user's profile and assigned permission sets.
The question describes a missing standard action, not a custom permission-controlled feature. The indicated fix is to add the action to the page layout, rather than assign a purported custom Log a Call permission.

✗ **D** The custom Log a Call permission has been disabled at the org level in Setup.
The scenario does not indicate that an organization-wide permission is controlling the action. The relevant setting is the page layout's Salesforce Mobile and Lightning Experience Actions section.

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Question 11

Single choice · Domain: D2 Object Manager and Lightning App Builder › Create and assign record types, business processes, and page layouts

Cloud Kicks' management team is hoping to increase user productivity by switching to consoles instead of the current traditional Salesforce user interface. What should a Platform Administrator use to implement this request?

A. App Builder
B. Screen Flow
C. App Manager
D. Omni-Channel

Answer: C. App Manager

Explanation

Cloud Kicks wants users to work in console apps rather than the traditional Salesforce interface. A Platform Administrator can create and configure a console app in App Manager, including selecting the console navigation style. Therefore, App Manager is the appropriate tool for this request.

✗ **A** App Builder
App Builder is used to create and customize pages, such as Lightning record pages. It is not the tool for creating and configuring the console app itself.

✗ **B** Screen Flow
A Screen Flow guides users through an interactive process. It does not switch the Salesforce interface to a console app.

✓ **C** App Manager
App Manager is where an administrator creates and manages Salesforce apps, including console apps. It lets the administrator configure the app users will use instead of the traditional interface.

✗ **D** Omni-Channel
Omni-Channel routes work to users and supports workload management. It can be used alongside a console, but it does not create or configure the console app.

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Question 12

Single choice · Domain: D2 Object Manager and Lightning App Builder › Create, delete, and customize fields and page layouts

The client services and customer support teams share the same profile but have different permission sets. The custom object Retention related list needs to be restricted to the client services team on the Lightning record page layout. What should a Platform Administrator use to fulfill this request?

A. Page Layout Assignment
B. Component Visibility
C. Record Type Assignment
D. Sharing Settings

Answer: B. Component Visibility

Explanation

Use Component Visibility on the Lightning record page to show the Retention related list only to the client services team. Because both teams share a profile, the page-layout assignment cannot distinguish them; visibility can instead be controlled using a criterion tied to the client services team, such as a permission associated with its permission set. This restricts the component's display without changing record access.

✗ **A** Page Layout Assignment
Page layout assignments determine which layout users receive, typically by profile and record type. Since both teams share the same profile, this would not selectively hide the Retention related list from customer support.

✓ **B** Component Visibility
Component Visibility lets an administrator conditionally display the Retention related list component on the Lightning record page. Its visibility can be based on a criterion that distinguishes client services users, such as a permission granted through their permission set.

✗ **C** Record Type Assignment
Record type assignment controls which record types users can access and can influence available business processes and layouts. It does not directly control visibility of this related-list component for two teams that share a profile.

✗ **D** Sharing Settings
Sharing settings govern access to records, not whether a related-list component appears on a Lightning record page. The request is to restrict the component's display to one team, so component visibility is the appropriate feature.

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Question 13

Single choice · Domain: D3 Sales and Marketing Applications › Determine the capabilities and implications of opportunity tools

Universal Containers wants to track all stakeholders involved in its sales opportunities to ensure proper relationship management. Sales reps need to identify who has decision-making authority, who influences the buying process, and who serves as the primary contact for each deal. Which feature should a Platform Administrator configure to meet this requirement?

A. Configure opportunity team members to track internal and external stakeholders.
B. Set up account teams to track stakeholders across multiple opportunities.
C. Use standard fields on opportunities to track stakeholder information.
D. Use contact roles on opportunities to identify stakeholder involvement and influence.

Answer: D. Use contact roles on opportunities to identify stakeholder involvement and influence.

Explanation

Configure contact roles on opportunities so sales reps can associate multiple contacts with a specific deal and identify each person's involvement, such as decision-maker, influencer, or primary contact. This provides deal-level stakeholder tracking rather than tracking internal team members or relying on general opportunity fields. [1]

✗ **A** Configure opportunity team members to track internal and external stakeholders.
Opportunity team members represent people working on the deal internally, not the external contacts involved in the buying process. This would not reliably identify which customer contact is the decision-maker, influencer, or primary contact.

✗ **B** Set up account teams to track stakeholders across multiple opportunities.
Account teams track people collaborating on an account, rather than the roles external contacts play in a particular opportunity. The requirement is to identify stakeholder involvement for each deal.

✗ **C** Use standard fields on opportunities to track stakeholder information.
Standard opportunity fields do not provide a suitable way to associate multiple contacts with distinct roles on a deal. Contact roles capture each contact's relationship to the opportunity.

✓ **D** Use contact roles on opportunities to identify stakeholder involvement and influence.
Contact roles let sales reps associate contacts with an opportunity and describe their involvement in the deal. This supports identifying decision-makers, influencers, and the primary contact for each opportunity. [1]

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Question 14

Single choice · Domain: D3 Sales and Marketing Applications › Determine the capabilities and implications of opportunity tools

A sales team is having difficulty understanding which stage their opportunity is in and what the company sales process requires of them in that stage. Which feature should a Platform Administrator implement to help the sales team quickly determine where they are in the sales process and what is required of them?

A. Reports & Dashboards
B. Opportunity Sales Path
C. Big Deal Alerts
D. List Views

Answer: B. Opportunity Sales Path

Explanation

Opportunity Sales Path displays the current opportunity stage and can provide stage-specific guidance about the actions and information required to move forward. This directly helps the sales team understand both where they are in the sales process and what is expected at that stage. The other options support reporting, notifications, or record filtering rather than stage-by-stage guidance.

✗ **A** Reports & Dashboards
Reports and dashboards summarize sales data and progress, but they do not provide sellers with stage-specific guidance about what the company requires them to do in an opportunity stage.

✓ **B** Opportunity Sales Path
Opportunity Sales Path makes the opportunity's current stage visible and can show guidance and key information for each stage. That helps sellers quickly identify their place in the process and what they should do next.

✗ **C** Big Deal Alerts
Big Deal Alerts notify users about significant opportunities or deal changes. They do not explain the sales process requirements for the opportunity's current stage.

✗ **D** List Views
List Views help users find and organize records using filters and columns. They do not provide the stage-by-stage process guidance requested in this scenario.

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Question 15

Single choice · Domain: D3 Sales and Marketing Applications › Determine the capabilities and implications of lead automation tools

When a qualified lead is converted, what happens to its related records?

A. Records from custom objects are attached to the resulting contact, account, and opportunity records.
B. Open activities only are attached to the resulting contact, account, and opportunity records.
C. All activities are attached to the resulting contact, account, and opportunity records.
D. Campaign history is attached to the resulting contact, account, and opportunity records.

Answer: C. All activities are attached to the resulting contact, account, and opportunity records.

Explanation

When a qualified lead is converted, its activities are carried over to the resulting contact, account, and opportunity. This includes both open and completed activities, so the choice limited to open activities is too narrow.

✗ **A** Records from custom objects are attached to the resulting contact, account, and opportunity records.
Lead conversion carries over the lead's activities, but it does not generally attach records from custom objects to all three resulting records. This option describes a broader transfer of related records than the conversion behavior in question.

✗ **B** Open activities only are attached to the resulting contact, account, and opportunity records.
Activities are carried over when the lead is converted, but the transfer is not limited to open activities. Completed activities are included as well.

✓ **C** All activities are attached to the resulting contact, account, and opportunity records.
The lead's activities are associated with the records created or selected during conversion: the contact, account, and, when created, opportunity. This includes both open and completed activities.

✗ **D** Campaign history is attached to the resulting contact, account, and opportunity records.
Campaign history is not what this conversion behavior describes, and this option incorrectly says it is attached to all three resulting records. The relevant records carried over here are the lead's activities.

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Question 16

Single choice · Domain: D4 Service and Support Applications › Determine the capabilities and implications of case management

At Cloud Kicks, when a rep needs to seek additional support help, there's a series of actions the company wants to ensure are taken. The steps include sending an email and changing the status and owner of the case. What should a Platform Administrator use to give the reps an easy way to make these updates?

A. Case Assignment Rules
B. Macros with Quick Actions
C. Quick Text with Email Templates
D. Autolaunched Flows with Email Alerts

Answer: B. Macros with Quick Actions

Explanation

Macros with Quick Actions let reps run a predefined sequence of actions from the case workflow. That fits the requirement to send an email and update the case status and owner through one easy, repeatable process. Case assignment rules, email templates, and autolaunched flows do not provide the same direct, rep-invoked convenience described in the scenario.

✗ **A** Case Assignment Rules
Assignment rules automatically route cases based on configured criteria, typically when a case is created or updated. They are not a rep-facing way to carry out a sequence that sends an email and changes both the status and owner on demand.

✓ **B** Macros with Quick Actions
A macro can package multiple actions for a rep to run, such as sending an email and updating case fields. Quick Actions make those steps accessible from the case workflow, giving reps the easy, repeatable process the scenario asks for.

✗ **C** Quick Text with Email Templates
Quick Text and email templates help reps compose messages more efficiently. They do not, by themselves, change the case status and owner as part of the same set of actions.

✗ **D** Autolaunched Flows with Email Alerts
An autolaunched flow can automate logic and send an email alert, but it runs without a user-facing launch interface by itself. This is not the straightforward rep-invoked tool described for performing the support steps from a case.

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Question 17

Single choice · Domain: D4 Service and Support Applications › Determine the capabilities and implications of case management

A Platform Administrator deactivates an agent to add a new topic and action. What happens to any ongoing user conversations with the agent?

A. The agent will pause the conversation and resume once reactivated.
B. The agent will continue conversations using the deactivated agent until reactivated.
C. The agent window automatically closes to prevent new messages.
D. The agent will send a system error message as a response to any new messages.

Answer: B. The agent will continue conversations using the deactivated agent until reactivated.

Explanation

Deactivating the agent to make changes does not interrupt conversations that are already in progress. Those conversations continue using the deactivated agent until it is reactivated, so the expected behavior is that existing users can continue their conversations rather than having them paused or closed.

✗ **A** The agent will pause the conversation and resume once reactivated.
Deactivation does not pause conversations that are already underway. Those conversations continue with the deactivated agent until it is reactivated.

✓ **B** The agent will continue conversations using the deactivated agent until reactivated.
This describes what happens to ongoing conversations: they continue using the deactivated agent while the administrator makes changes. Reactivation is not required for those existing conversations to continue.

✗ **C** The agent window automatically closes to prevent new messages.
Deactivating the agent does not automatically close the conversation window for users who already have ongoing conversations. Their conversations continue with the deactivated agent until it is reactivated.

✗ **D** The agent will send a system error message as a response to any new messages.
Ongoing conversations do not switch to error responses merely because the agent is deactivated. They continue using the deactivated agent until it is reactivated.

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Question 18

Single choice · Domain: D4 Service and Support Applications › Determine the capabilities and implications of case management

Cloud Kicks wants to ensure that every client has support based on the level of service that has been agreed on in the sales cycle. There are tiers to this support model, Gold, Silver, and Bronze. What should a Platform Administrator create to ensure that this is part of every client's account once they become a client?

A. A flow to assign Entitlements
B. Routing Configuration for each client
C. Email to Case for each service level
D. Case Assignment Rules for each client

Answer: A. A flow to assign Entitlements

Explanation

Create a flow that assigns the appropriate Entitlement when an account becomes a client. Entitlements represent the agreed support terms, so the flow can associate the Gold, Silver, or Bronze level with each client's account. This makes the support tier part of the client record rather than relying on case-routing or case-assignment settings.

✓ **A** A flow to assign Entitlements
A flow can respond when an account becomes a client and assign the Entitlement that matches the service tier agreed during sales. The Entitlement records the client's support terms, making it the appropriate choice for this requirement.

✗ **B** Routing Configuration for each client
Routing configurations control how work such as cases is routed to agents or queues. They do not record the support tier agreed with each client on the account.

✗ **C** Email to Case for each service level
Email-to-Case turns incoming customer emails into cases. Creating a separate setup for each service level would not associate the agreed support tier with every client's account.

✗ **D** Case Assignment Rules for each client
Case assignment rules determine which user or queue receives a case. They do not define the client's support terms or attach a Gold, Silver, or Bronze tier to the account.

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Question 19

Single choice · Domain: D5 Productivity and Collaboration › Determine the capabilities and implications of activity management

The VP of sales at AW Computing would like sales reps to check in with their top account every Monday. The VP would like a dashboard component to show the status of the check-ins. What should a Platform Administrator configure to remind the reps to contact their top account?

A. Create a time-based workflow task.
B. Enable the creation of recurring tasks.
C. Add the email action to the page layout.
D. Use a process email alert on the account.

Answer: B. Enable the creation of recurring tasks.

Explanation

Enable the creation of recurring tasks so reps can schedule a task to contact their top account every Monday. The tasks can then be tracked and their status displayed in a dashboard component, matching the VP's recurring reminder and status-reporting needs.

✗ **A** Create a time-based workflow task.
A time-based workflow task is triggered by a configured time condition, rather than creating a repeating weekly check-in task for each rep. It does not directly meet the requirement for Monday check-ins whose completion status can be tracked as recurring tasks.

✓ **B** Enable the creation of recurring tasks.
Recurring tasks let reps schedule a task to contact their top account every Monday. Those tasks provide trackable check-in statuses that can be surfaced in a dashboard component.

✗ **C** Add the email action to the page layout.
An email action gives users a way to send an email from the page, but it does not schedule a weekly reminder or create a trackable check-in task. Therefore, it does not address the dashboard status requirement.

✗ **D** Use a process email alert on the account.
A process email alert sends an email when its configured conditions are met; it is not a recurring task assigned to remind each rep to make a Monday check-in. It also does not provide recurring task statuses for the requested dashboard component.

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Question 20

Single choice · Domain: D6 Data and Analytics Management › Determine the capabilities and implications of reports and dashboards

The sales and service teams at Cloud Kicks would like to have more visibility into their pipeline and stay on top of every case. A Platform Administrator needs to quickly create dashboards for each of the teams but does not know where to start. What should the administrator do?

A. Use the Salesforce Labs Field Service Dashboards for service teams from AppExchange.
B. Enable Einstein Analytics and build custom dashboards using advanced analytics tools.
C. Use the Salesforce Labs CRM Dashboards for sales teams from AppExchange.
D. Manually create dashboards without using any prebuilt templates or packages.

Answer: C. Use the Salesforce Labs CRM Dashboards for sales teams from AppExchange.

Explanation

The Salesforce Labs CRM Dashboards package is the quickest suitable starting point for the sales team's pipeline visibility because it provides prebuilt sales dashboards from AppExchange. It avoids the time and complexity of building dashboards from scratch or enabling an advanced analytics platform. The other AppExchange option is focused on Field Service, not the sales pipeline described.

✗ **A** Use the Salesforce Labs Field Service Dashboards for service teams from AppExchange.
This package is aimed at Field Service, which is not the same as tracking the sales pipeline or staying on top of general support cases. It is therefore not the best fit for the stated dashboard needs.

✗ **B** Enable Einstein Analytics and build custom dashboards using advanced analytics tools.
The administrator needs a quick starting point, not an advanced analytics implementation. Building custom dashboards with these tools adds setup and development work when a prebuilt AppExchange option is available.

✓ **C** Use the Salesforce Labs CRM Dashboards for sales teams from AppExchange.
This prebuilt package is specifically intended for sales teams, making it a direct starting point for improving visibility into the pipeline. Using it is quicker than designing dashboards manually or setting up an advanced analytics solution.

✗ **D** Manually create dashboards without using any prebuilt templates or packages.
Creating dashboards from scratch requires more work and does not meet the administrator's need to get started quickly. A ready-made package for sales dashboards is a more efficient starting point.

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Question 21

Single choice · Domain: D6 Data and Analytics Management › Determine the capabilities and implications of reports and dashboards

The call center manager at Ursa Major Solar wants to provide agents with a case dashboard that can be drilled down by case origin, status, and owner. What should a Platform Administrator add to the dashboard to fulfill the request?

A. Dashboard Filter
B. Dashboard Widget
C. Combination Chart
D. Bucket Column

Answer: A. Dashboard Filter

Explanation

A dashboard filter lets agents interactively narrow the dashboard's case data by fields such as case origin, status, and owner. This directly supports the requested drill-down without requiring separate dashboard components for each value.

✓ **A** Dashboard Filter
A dashboard filter lets agents select values for case fields such as origin, status, and owner to narrow the dashboard's displayed data. That matches the requested interactive drill-down.

✗ **B** Dashboard Widget
A widget is a dashboard component for displaying information, but adding a generic widget does not provide the requested controls for filtering cases by origin, status, and owner.

✗ **C** Combination Chart
A combination chart displays data using multiple chart types, but it is a visualization rather than an interactive way for agents to filter dashboard data by the requested fields.

✗ **D** Bucket Column
A bucket column groups report values into categories. It does not add dashboard-level controls that agents can use to filter case data by origin, status, and owner.

Dumpsgate

Question 22

Single choice · Domain: D6 Data and Analytics Management › Determine the appropriate data validation tools

Northern Trail Outfitters (NTO) wants to ensure new Contacts are validated before they can be saved.

If a user selects that the LeadSource picklist value is Other, NTO also wants to populate a custom text field called Source c. Which validation rule should a Platform Administrator configure to meet this requirement?

A. AND(LeadSource = 'Other', Source c = '')
B. AND(NOT(LeadSource = 'Other'), NOT(Source c = ''))
C. AND(ISPICKVAL(LeadSource,'Other'), ISBLANK(Source c))
D. AND(NOT(ISPICKVAL(LeadSource,'Other'))), NOT(ISBLANK(Source c))

Answer: C. AND(ISPICKVAL(LeadSource,'Other'), ISBLANK(Source c))

Explanation

A validation rule blocks saving when its formula evaluates to true. Option C uses `ISPICKVAL` to check whether the LeadSource picklist is `Other` and `ISBLANK` to check whether the custom text field is empty, so it blocks exactly the records that need a Source value.

✗ **A** AND(LeadSource = 'Other', Source c = '')
This uses direct equality to test a picklist value rather than the Salesforce picklist comparison function `ISPICKVAL`. It also does not use `ISBLANK` to check whether the text field is empty, as the correct formula does.

✗ **B** AND(NOT(LeadSource = 'Other'), NOT(Source c = ''))
This condition targets records where LeadSource is not Other and the text field is not empty. It therefore does not block a record with Other selected and a blank Source field, which is the scenario the rule must catch.

✓ **C** AND(ISPICKVAL(LeadSource,'Other'), ISBLANK(Source c))
`ISPICKVAL` correctly checks whether the LeadSource picklist is set to Other, and `ISBLANK` checks whether the custom text field has no value. Because the conditions are joined with `AND`, the validation rule fires only when Other is selected and Source is blank.

✗ **D** AND(NOT(ISPICKVAL(LeadSource,'Other'))), NOT(ISBLANK(Source c))
The condition is reversed: it tests for a LeadSource value other than Other and a nonblank Source field, rather than Other with a blank Source field. As written, it also has an extra closing parenthesis after the first condition, making the formula malformed.

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Question 23

Single choice · Domain: D6 Data and Analytics Management › Determine the capabilities and implications of reports and dashboards

Users at DreamHouse Realty are only allowed to see opportunities they own. Leadership wants an enterprise-wide dashboard of all open opportunities in the pipeline so that users can see how the company is performing at any point in time. How should a Platform Administrator create the dashboard without changing any sharing settings?

A. Create a dashboard with the running user set as someone who can see all opportunities.
B. Add a filter to the dashboard to filter the opportunities by owner role.
C. Build individual dashboards for profiles that need to see the enterprise results.
D. Update the dashboard folder settings to manager for the sales reps role.

Answer: A. Create a dashboard with the running user set as someone who can see all opportunities.

Explanation

A dashboard's running user determines which records its results can include. Setting the running user to someone who can see all opportunities lets the dashboard show the enterprise-wide open pipeline while leaving users' opportunity-sharing settings unchanged.

✓ **A** Create a dashboard with the running user set as someone who can see all opportunities.
The dashboard runs with the selected user's record access, so a running user who can see all opportunities can provide an enterprise-wide view of the pipeline. This does not change the sharing settings that limit users' own access to opportunities.

✗ **B** Add a filter to the dashboard to filter the opportunities by owner role.
A filter narrows or segments the dashboard results; it does not grant access to records that the dashboard's running context cannot see. Filtering by owner role therefore does not meet the requirement for an enterprise-wide view without changing sharing.

✗ **C** Build individual dashboards for profiles that need to see the enterprise results.
Separate dashboards for profiles do not, by themselves, make opportunities visible beyond the record access available to each dashboard's running user. This adds maintenance and does not reliably provide the requested enterprise-wide results.

✗ **D** Update the dashboard folder settings to manager for the sales reps role.
Dashboard folder settings govern access to the dashboard itself, not which opportunity records its results can include. Changing folder access would not create an enterprise-wide opportunity view and would change access settings contrary to the requirement.

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Question 24

Single choice · Domain: D7 Workflow/Process Automation › Determine the capabilities and implications of approval processes

Which component of an approval process defines the chain of approval, determines which records can advance, and specifies where to assign approval requests? 1717

A. Process Definition Detail
B. Approval Steps
C. Entry Criteria
D. Approval Actions

Answer: B. Approval Steps

Explanation

Approval Steps define the sequence of approvers in an approval process. They can specify criteria that determine whether a record advances to a step and identify the approver or approvers who receive the request. Therefore, Approval Steps meet all three requirements in the question.

✗ **A** Process Definition Detail
Process Definition Detail contains information about the approval process itself, but it does not define the chain of approvers or assign requests to them. Those responsibilities belong to the approval steps.

✓ **B** Approval Steps
Approval Steps establish the approval sequence and specify who receives each approval request. They can also use step criteria to determine whether a record advances through the process.

✗ **C** Entry Criteria
Entry Criteria determine whether a record qualifies to enter the approval process. They do not define the chain of approvers, govern advancement between approval steps, or specify where requests are assigned.

✗ **D** Approval Actions
Approval Actions specify actions to perform at points in the process, such as when a request is submitted or approved. They do not define the approval chain or assign approval requests.

Question 25

Single choice · Domain: D7 Workflow/Process Automation › Determine the capabilities and implications of approval processes

Which action should a Platform Administrator configure to reverse a submitted approval request and unlock the associated record when setting up an approval process? 99

A. Final Rejection Actions
B. Recall Actions
C. Final Approval Actions
D. Initial Submission Actions

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Answer: B. Recall Actions

Explanation

Configure Recall Actions to handle a submitted approval request that is recalled. This is the approval-process action category for reversing the pending submission, and it can be used to unlock the associated record.

✗ **A** Final Rejection Actions
These actions run when an approver rejects the request. The scenario asks how to reverse a submitted request and unlock its record, which is handled through recall rather than rejection.

✓ **B** Recall Actions
Recall Actions apply when a submitted approval request is recalled. Configure the record-unlock action here to reverse the submission and make the associated record available again.

✗ **C** Final Approval Actions
These actions run after the request is approved. They do not reverse a pending submission or unlock a record because it has been recalled.

✗ **D** Initial Submission Actions
These actions run when a record is first submitted for approval. They are not the actions for reversing that submission and unlocking the record afterward.

Question 26

Single choice · Domain: D7 Workflow/Process Automation › Determine the capabilities and implications of Flow

Cloud Kicks wants Agentforce to adapt its behavior based on real-time customer input. Which feature directly enables this capability? 1

A. Data Cloud
B. Custom actions
C. Screen flow
D. Tableau

Answer: B. Custom actions

Explanation

Custom actions let Agentforce take action in response to what a customer says or provides, so the agent can adapt its behavior during the interaction. Data Cloud can provide customer data, but custom actions are the direct mechanism among these choices for responding dynamically to input.

✗ **A** Data Cloud
Data Cloud can supply customer data that may inform an agent's responses. It is not the direct feature for defining actions Agentforce can take in response to real-time customer input.

✓ **B** Custom actions
Custom actions give Agentforce capabilities it can invoke based on the customer's input, enabling it to respond with relevant actions during an interaction. This directly supports the requested behavior

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adaptation.

✗ **C** Screen flow
A screen flow guides a user through a configured sequence of screens and steps. It is not the direct Agentforce feature for dynamically choosing actions based on real-time customer input.

✗ **D** Tableau
Tableau is used for data visualization and analytics. It does not directly enable Agentforce to adapt its behavior during a customer interaction.

Question 27

Single choice · Domain: D7 Workflow/Process Automation › Determine the capabilities and implications of approval processes

DreamHouse Realty has an approval process. A manager attempts to approve a record but receives an error. What should a Platform Administrator do to troubleshoot this issue?

A. Check if the user in the next approver is inactive or missing.
B. Review the page layout to ensure the fields updated in the process are visible.
C. Update the field-level security to view on fields that are updated in the process.
D. Add a delegated approver for the next approver in the process.

Answer: A. Check if the user in the next approver is inactive or missing.

Explanation

Check whether the user assigned as the next approver is inactive or missing. Approval routing depends on a valid approver, so this is the most relevant cause to investigate when a manager receives an error while approving the record. Page layout visibility and field-level security do not address whether the next approver can be resolved.

✓ **A** Check if the user in the next approver is inactive or missing.
A missing or inactive user assigned as the next approver can prevent the approval process from routing correctly. Checking that assignment directly is the appropriate troubleshooting step for an approval error.

✗ **B** Review the page layout to ensure the fields updated in the process are visible.
Page layout visibility affects what users see on the record, not whether the approval process can identify a valid next approver. It does not address the likely routing issue in this scenario.

✗ **C** Update the field-level security to view on fields that are updated in the process.
Field-level security controls a user's access to view fields, while the issue described concerns approving and routing an approval request. Changing field visibility does not resolve an inactive or missing next approver.

✗ **D** Add a delegated approver for the next approver in the process.
A delegated approver can provide an alternate approver in applicable situations, but adding one does not first verify that the assigned next approver is active and correctly specified. The administrator should investigate the next approver assignment itself.

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Question 28

Single choice · Domain: D7 Workflow/Process Automation › Determine the capabilities and implications of Flow

An agent is being developed with several actions that all retrieve information from different databases. A Platform Administrator has named the actions as follows: GetCustomerInfo, GetOrderDetails, GetShippingStatus. Which best practice should the administrator follow to improve these names?

A. Remove all verbs and use only nouns, such as CustomerInfo, OrderDetails, and ShippingStatus.

B. Add the word "Salesforce" to the beginning of each action name to improve context for the large language model.

C. Use a consistent naming convention by starting each action with the verb "Get".

D. Use additional related verbs, such as Find, Retrieve, or Identify.

Answer: C. Use a consistent naming convention by starting each action with the verb "Get".

Explanation

The actions all retrieve information, and their names already use the verb “Get.” Keeping that shared verb-first pattern makes the actions consistent and helps distinguish them by the information they retrieve: customer info, order details, or shipping status. Therefore, the administrator should retain the consistent “Get” naming convention.

✗ **A** Remove all verbs and use only nouns, such as CustomerInfo, OrderDetails, and ShippingStatus.
Removing the verbs would discard the shared indication that these actions retrieve information. The current names make that action clear while the nouns identify the type of information.

✗ **B** Add the word "Salesforce" to the beginning of each action name to improve context for the large language model.
The scenario does not indicate that Salesforce context is needed, and adding the same platform prefix would not improve the consistency of the action verbs. The existing “Get” prefix already consistently describes what the actions do.

✓ **C** Use a consistent naming convention by starting each action with the verb "Get".
All three actions retrieve information, so using the same verb accurately describes their shared purpose. Their distinct nouns still make clear whether each action returns customer information, order details, or shipping status.

✗ **D** Use additional related verbs, such as Find, Retrieve, or Identify.
Using different verbs for actions that all retrieve information would make their names less consistent. A shared “Get” prefix is clearer for this group of actions.

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Question 29

Single choice · Domain: D7 Workflow/Process Automation › Determine the capabilities and implications of Flow

Which task is especially suited for Agentforce?

A. Single-step predefined processes
B. Static document generation
C. Multi-step processes that need adaption to change
D. Tasks without decision-making

Answer: C. Multi-step processes that need adaption to change

Explanation

Agentforce is especially suited to processes that involve multiple steps and may need to adjust as circumstances change. That adaptive, decision-oriented workflow is a better fit for an agent than a fixed process or a task that requires no decisions. [1, 6]

✗ **A** Single-step predefined processes
A fixed, single-step process does not need the multi-step coordination or adaptability that makes an agent especially useful. It is generally a better fit for straightforward automation.

✗ **B** Static document generation
Generating a document from fixed inputs is typically a predictable task, rather than a process that must adapt its steps to changing circumstances. It does not describe Agentforce's distinctive fit in this question.

✓ **C** Multi-step processes that need adaption to change
This describes workflows where an agent must coordinate multiple actions and adjust its approach as conditions or requirements change. Agent-based orchestration is suited to such dynamic workflows. [1, 6]

✗ **D** Tasks without decision-making
If a task requires no decisions, a fixed rule or conventional automation can often perform it. The option therefore lacks the adaptive decision-making characteristic that makes Agentforce especially suited to a task.

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Question 30

Single choice

A Platform Administrator is designing a prompt template for a new agent. The agent's purpose is to help service reps troubleshoot technical issues by providing concise, step-by-step instructions. Based on best practices for creating effective prompts, which approach should the administrator use when writing this prompt? 16

A. Write a detailed prompt with multiple nested conditions to cover all the major troubleshooting scenarios.

B. Use specific technical terms and abbreviations to ensure the AI understands the specialised domain.

C. Focus on providing high-level, theoretical concepts so the AI has the flexibility to respond creatively.

D. Use natural, easy-to understand language and clear, concise instructions to guide the AI's behavior.

Answer: D. Use natural, easy-to understand language and clear, concise instructions to guide the AI's behavior.

Explanation

The agent must give service reps concise, step-by-step troubleshooting instructions, so its prompt should state the desired behavior plainly and clearly. Natural language and concise directions make the expected response easier to follow than a prompt crowded with nested rules, unexplained jargon, or abstract concepts. This approach aligns the prompt with the practical, actionable help the scenario requires.

✗ **A** Write a detailed prompt with multiple nested conditions to cover all the major troubleshooting scenarios.
Multiple nested conditions can make the prompt complicated and harder to follow. The goal is concise, step-by-step help, so the instructions should guide the agent clearly rather than try to encode every scenario in a dense prompt.

✗ **B** Use specific technical terms and abbreviations to ensure the AI understands the specialised domain.
Technical terms may be useful when they are necessary, but relying on abbreviations and specialized language can make instructions less clear. The prompt should use language that reliably guides the agent to give service reps understandable troubleshooting steps.

✗ **C** Focus on providing high-level, theoretical concepts so the AI has the flexibility to respond creatively.
Theoretical concepts do not specify the concrete behavior needed: concise, step-by-step troubleshooting instructions. Leaving the response overly open-ended can produce answers that are less actionable or consistent for service reps.

✓ **D** Use natural, easy-to understand language and clear, concise instructions to guide the AI's behavior.
Plain, direct instructions make the intended response style clear and help the agent produce practical guidance. This fits the requirement for concise, step-by-step troubleshooting help for service reps.

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