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Question 1

Question Type: MultipleChoice

Cloud Kicks has hired a new sales executive who wants to implement a document merge solution in Salesforce. How should a Platform Administrator implement this solution?

Options:

A- Download the solution from AppExchange.

B- Install a package from the Partner Portal.

C- Create a managed package in AppExchange.

D- Configure the package from Salesforce Setup.

Answer:

A

Explanation:

Salesforce does not provide a robust, native 'document merge' engine that can handle complex templates, headers, and advanced formatting out of the box. Therefore, the standard practice for implementing such a solution is to download a third-party application from the AppExchange. The AppExchange is the primary marketplace for Salesforce-integrated solutions, offering popular document generation tools like Conga Composer, Nintex DocGen, or S-Docs. These tools allow administrators to create professional-grade documents (like quotes, contracts, and invoices) by merging Salesforce record data into Word, PDF, or Excel templates. As a Platform Administrator, the process involves researching the best-fit app for the requirements, installing the package into a Sandbox for testing, and then deploying it to Production. This approach is highly efficient because it leverages existing, vetted technology that is specifically designed to handle the complexities of document generation, saving the organization from trying to build a costly and difficult-to-maintain custom solution using code or complex automation.

Question 2

Question Type: MultipleChoice

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?

Options:

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

Answer:

B, D

Explanation:

To 'undo' a mistaken import, the administrator must delete the incorrectly created records. Two standard tools facilitate this:

Mass Delete Records (Option D): This is a browser-based tool in Setup that allows administrators to delete up to 250 records at a time (standard) or use criteria to identify and remove larger sets of records. It is the quickest way for smaller mistakes.

Data Loader (Option B): For large-scale errors, the administrator can use the Success file generated during the original import (which contains the new record IDs) and perform a 'Delete' operation.

The Data Import Wizard (Option C) is for adding or updating data, but it does not have a 'Delete' function. Weekly Data Export (Option A) is a backup tool and cannot be used to remove existing data from the system.

Question 3

Question Type: MultipleChoice

Ursa Major Solar wants to automatically notify a manager about any cases awaiting a response from an agent for more than 2 hours after case creation. Which feature should a Platform Administrator use to fulfill this requirement?

Options:

A- Assignment Rule
B- Case Escalation Rule
C- Formula field
D- Omni-Channel Supervisor

Answer:

B

Explanation:

Case Escalation Rules are the dedicated tool for time-based notifications and reassignments in Service Cloud. The Platform Administrator can set an escalation rule entry that triggers when a case is 'Older than 2 hours' and meets specific status criteria (e.g., Status = New). The rule can then be configured to send an Email Notification to a manager or a specific distribution list. This ensures that management is alerted to potential SLA breaches. Assignment Rules (Option A) only run when a case is first created. Formula fields (Option C) can calculate time but cannot send notifications. Omni-Channel Supervisor (Option D) allows for real-time monitoring but does not provide automated email alerting based on specific time-elapsed thresholds.

Question 4

Question Type: MultipleChoice

A Platform Administrator creates a custom text area field on the Account object and adds it to the service team's page layout. The service team manager loves the addition of this field and wants it to appear in the highlights panel so that the service reps can quickly find it when on the Account page. How should the administrator accomplish this?

Options:

A- In the Account object manager, create a custom compact layout.
B- Make the field required and move it to the top of the page.
C- Create a new page layout and a new section titled highlights panel.
D- From the page layout editor, drag the field to the highlights panel.

Answer:

A

Explanation:

In the Salesforce Lightning Experience, the Highlights Panel at the top of a record page is controlled by the Compact Layout. The compact layout determines which fields (up to 7) appear in the record header and in the hover-over details. To add a new custom field to this area, the Platform Administrator must go to the Object Manager for Accounts, select Compact Layouts, and either edit the existing primary layout or create a new custom one. After adding the custom text area field to the 'Selected Fields' list and saving, the field will immediately appear in the Highlights Panel for users. It is a common misconception that the standard Page Layout editor (Option D) controls the highlights panel; while the page layout controls the 'Details' section and 'Related Lists,' it does not manage the header area. Option B might make the field easier to find in the details section but will not place it in the highlights panel.

Question 5

Question Type: MultipleChoice

A Platform Administrator has reviewed an upcoming critical update. How should the administrator proceed with activation of the critical update?

Options:

A- Allow the critical update to auto-activate in a sandbox.
B- Activate the critical update in production.
C- Activate the critical update in a sandbox.
D- Allow the critical update to auto-activate.

Answer:

C

Explanation:

Salesforce Critical Updates (now often called Release Updates) can significantly change the behavior of the platform, potentially impacting custom code, integrations, or existing automation. The best practice for any Platform Administrator is to activate and test the update in a Sandbox environment first. This allows the administrator to identify and resolve any breaking changes without disrupting the live business operations in Production. Only after the update has been thoroughly vetted and all necessary adjustments have been made should the update be activated in the Production environment. Allowing an update to 'auto-activate' (Options A and D) is risky because it removes the administrator's control over the timing and testing of the change. Activating directly in Production (Option B) bypasses the essential quality assurance steps that are fundamental to professional org management.

Question 6

Question Type: MultipleChoice

Management at Universal Containers would like to share dashboard components with their team in Chatter but currently does not have access to this capability. How should a Platform Administrator make this functionality available to management?

Options:

A- Enable reporting snapshots.

B- Select Download Chart on the component.

C- Set View Dashboard As to the dashboard viewer.

D- Enable dashboard feed tracking.

Answer:

D

Explanation:

To allow users to post snapshots of dashboard components and engage in discussions about data directly on the dashboard, the Platform Administrator must enable Feed Tracking for dashboards. In Salesforce, Chatter Feed Tracking allows changes to records and interactions to be tracked and shared in the Chatter feed. For dashboards specifically, enabling this feature allows users to 'Follow' a dashboard and use the 'Post to Feed' functionality on individual dashboard components. This is highly effective for management teams who want to call out specific successes or areas of concern by tagging team members in a post that includes the visual chart. Reporting snapshots (Option A) are used for historical trend reporting, not social sharing. Downloading charts (Option B) is a manual file-handling process rather than an integrated social feature. Setting the 'View Dashboard As' (Option C) determines data visibility but does not control Chatter functionality.

Question 7

Question Type: MultipleChoice

Cloud Kicks has implemented an Employee Agent to answer benefits questions for its employees. How should a Platform Administrator prevent the agent from responding to staff members' questions about the CEO's private health plan and benefits?

Options:

A- Configure assignment rules to assign the agent to employee data.

B- Ensure the users' permissions and field-level security restrict access to the CEO's health plan.

C- Modify the agent's instructions and guardrails to block questions related to the CEO's health plan.

D- Train the agent on employee health plans instead of the CEO's health plan.

Answer:

B

Explanation:

In the context of Agentforce AI, grounding and data security are paramount. Salesforce AI agents, including Employee Agents, respect the existing security model of the Salesforce organization1. This means that the most effective way to prevent an agent from accessing or disclosing sensitive information, such as a CEO's private health plan, is to leverage Field-Level Security (FLS) and user permissions2. When an agent 'grounds' its response, it only considers data that the running user (or the agent's service user) has the permission to view3. If the CEO's health records are stored in fields or records that are restricted via FLS or Sharing Settings from the profiles or permission sets used by the agent's context, the agent will simply not 'see' that data during its retrieval phase4. While modifying instructions and guardrails (Option C) provides an additional layer of safety, it is not as foolproof as the underlying security architecture5. Training the agent (Option D) is not a standard configuration step for preventing specific record access in a production environment6. Therefore, maintaining a robust security model is the critical prerequisite for ensuring that AI agents provide accurate and safe responses without leaking confidential business information.

Question 8

Question Type: MultipleChoice

Users at Cloud Kicks are reporting different options when updating a custom picklist on the Opportunity object based on the kind of opportunity. Where should a Platform Administrator update the option in the picklist?

Options:

A- Related lookup filters
B- Record type
C- Picklist value sets
D- Fields and relationships

Answer:

B

Explanation:

When a single picklist field needs to show different values to different users or for different business contexts, Record Types are the configuration point. While the master list of all possible values is defined in 'Fields and Relationships' (Option D) or a 'Global Value Set' (Option C), the Record Type determines which of those values are 'available' for a specific type of record. For example, a 'Wholesale' record type might show different discount levels than a 'Retail' record type. If users are seeing inconsistent or incorrect options, the Platform Administrator must go to the specific Record Type settings for the Opportunity object, find the picklist in question, and move values between the 'Available' and 'Selected' columns. This provides a tailored user experience and prevents users from selecting values that do not apply to the specific type of record they are managing.

Question 9

Question Type: MultipleChoice

A sales rep has left the company, and a Platform Administrator has been asked to re-assign all their accounts and opportunities to a new sales rep and keep the team as is. Which tool should the administrator use to accomplish this?

Options:

A- Data Loader
B- Dataloader.io
C- Mass Transfer Records
D- Data Import Wizard

Answer:

C

Explanation:

The Mass Transfer Records tool is a built-in Salesforce feature designed specifically for the scenario of a person leaving the company or changing roles. It allows a Platform Administrator to select a 'From' user and a 'To' user and then choose specific record types to transfer, such as Accounts and Opportunities. A major advantage of this tool is that it gives the administrator the option to transfer related records (like open opportunities or cases) and keep existing teams (like Account Teams) intact during the move. While Data Loader (Option A) or Dataloader.io (Option B) could technically perform a bulk update of the 'OwnerId' field, they require several steps, including exporting data, manipulating CSV files, and re-uploading. The Data Import Wizard (Option D) is primarily for creating or updating records from an external file and does not have a dedicated 'transfer' function. Mass Transfer is the fastest and safest standard way to reassign ownership within the Setup menu.

Question 10

Question Type: MultipleChoice

A VP of sales needs to report on records owned by individuals in various parts of the role hierarchy. The organization-wide default is set to Private. What should a Platform Administrator configure to achieve this?

Options:

A- Field-Level Security
B- Sharing Rules
C- Permission Sets
D- Restriction Rules

Answer:

B

Explanation:

When the Organization-Wide Default (OWD) for an object is set to Private, users can only see records they own or those shared with them. While the Role Hierarchy automatically grants 'upward' visibility (managers see what subordinates own), it does not naturally allow for 'lateral' visibility or visibility across different branches of the hierarchy. To solve this, a Platform Administrator should use Sharing Rules. Sharing Rules allow the admin to create exceptions to the Private OWD based on record ownership or specific criteria. For example, the admin can create an 'Owner-based Sharing Rule' that shares all records owned by the 'East Coast Sales' role with the VP of Sales (or a Public Group the VP belongs to). This provides a scalable way to grant the necessary visibility for reporting without making the data public to the entire company. Sharing Rules are a core security feature that ensures the right people have access to the right data while maintaining the principle of least privilege.