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Exam : **Plat-Admn-201**

Title : **Salesforce Certified Platform Administrator**

Vendor : **Salesforce**

Version : **DEMO**

NO.1 In an approval process, which feature allows a user to temporarily assign their approval responsibilities to another user for a predefined time period?

- A. Approval Rule
- B. Queue
- C. Delegated Approver
- D. Manager

Answer: C

Explanation:

A Delegated Approver is a user designated by an individual or an administrator to act on their behalf when an approval request is received. This is particularly useful for planned absences, such as vacations. While the delegated approver has the power to approve or reject a record, they cannot reassign the request to someone else. This is a temporary manual assignment and is different from a Manager (Option D), who is part of the permanent role hierarchy, or a Queue (Option B), which allows a group of people to share approval tasks. There is no feature called an "Approval Rule" (Option A) that handles temporary user reassignment in this manner.

NO.2 The VP of sales at Cloud Kicks has a standard sales profile and is receiving an error message that prevents them from saving an opportunity. A Platform Administrator attempted the same edit without receiving an error. How should the administrator troubleshoot this issue?

- A. Log in as a system administrator to troubleshoot.
- B. Use 'Login as' to log in as the user.
- C. Use an AppExchange product to troubleshoot.
- D. Ask the user for their password so the admin can log in as the user.

Answer: B

Explanation:

When a specific user encounters an error that an administrator cannot replicate, the most effective troubleshooting technique is to "Login as" that user. This feature, which must be enabled in the organization's login policies, allows the administrator to see exactly what the user sees and experience the system through their specific profile, role, and sharing permissions²². This is vital for identifying issues related to Validation Rules, Field-Level Security, or Record-Triggered Flows that might only trigger under specific user contexts. Logging in as a system administrator (Option A) is ineffective because administrators often bypass certain restrictions that apply to standard users⁴. Asking for a password (Option D) is a major security violation and is never required in Salesforce⁵. By using the "Login as" feature, the admin can pinpoint whether the error is caused by the user's data input or a specific permission conflict assigned to their profile.

NO.3 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

Explanation:

In Salesforce, validation rules use formulas to verify if the data entered by a user meets specific criteria before saving the record¹. To check the value of a picklist field like LeadSource, the ISPICKVAL() function must be used, as picklist fields do not support standard text operators like "=" in validation formulas². The requirement is to block the save if LeadSource is "Other" but the Source__c text field is empty³. The ISBLANK() function effectively checks if a text field contains no data⁴. Therefore, the correct logic uses AND() to trigger the error message only when both conditions are met: the picklist is set to "Other" AND the text field is blank⁵. Option A is incorrect because it treats a picklist like a text field⁶. Option B and D use NOT() logic, which would trigger errors in the wrong scenarios.

NO.4 Sales managers would like to know what could be implemented to surface important values based on the stage of the opportunity? Which tool should a Platform Administrator use to meet this requirement?

- A. Workflow Rules
- B. Path Key Fields
- C. Opportunity Processes
- D. Dynamic Forms

Answer: B

Explanation:

The Opportunity Path is a visual tool that guides sales reps through the stages of a sales cycle. One of its most powerful features for administrators is the ability to define Key Fields for each individual stage. For example, when an opportunity is in the "Discovery" stage, the administrator can choose to display fields like "Budget" and "Decision Maker." When the deal moves to "Negotiation," the Path can be configured to surface "Contract Terms" and "Discount Percentage." This ensures that reps are prompted to enter and review the most relevant data at exactly the right time in the process. While Dynamic Forms (Option D) can show or hide fields on the main record page, the Path specifically organizes this information at the top of the record in a way that is directly tied to the sales methodology. Workflow Rules (Option A) are a legacy automation tool that cannot modify the user interface. Path Key Fields empower sales teams to maintain focus and data accuracy throughout the deal lifecycle.

NO.5 The Activity Timeline is missing from the Account record page. What should a Platform Administrator do to correct this?

- A. Add the standard Activities component to the Account Lightning record page.
- B. Update the user's permission to allow Edit access to the Activity Timeline.
- C. Run a report to verify whether any activities have been logged for that Account.
- D. Add a button for the Activity Timeline in the Object Manager for the Account object.

Answer: A

Explanation:

The Activity Timeline is a standard Lightning component that displays open tasks, upcoming events, and past activities (like logged calls or sent emails) in a chronological view. If this timeline is missing from an Account page, it is usually because the component has been removed from the Lightning Record Page layout. To fix this, the Platform Administrator should open the Account record in the

Lightning App Builder. From the list of standard components on the left, the admin must drag the Activities component onto the page canvas-typically in the right-hand column or a dedicated tab. Once the page is saved and activated, the timeline will be visible to users. Visibility of the timeline is a layout configuration, not a specific "Edit access" permission (Option B). Running a report (Option C) might confirm if data exists, but it won't fix the UI issue. There is no "button" for the Activity Timeline in the Object Manager (Option D); it is managed strictly as a component within the App Builder.

NO.6 What are three characteristics of a master-detail relationship?

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

Answer: B,C,D

Explanation:

A Master-Detail Relationship is a tight coupling between two objects that provides several unique functionalities:

Master Object Types: The master can be either a standard object (like Account) or a custom object (Option B).

Roll-up Summaries: This relationship type is the only one that natively supports Roll-up Summary fields, allowing the master record to calculate counts, sums, or averages of fields on the detail records (Option C).

Ownership and Security: The detail record inherits its owner and its security/sharing settings from the master record. Consequently, there is no "Owner" field on a detail record; it is always owned by the owner of the master (Option D).

Option A is incorrect because detail records cannot have independent permissions. Option E is incorrect because an object can only have a maximum of two master-detail relationships. This relationship is ideal for parent-child scenarios where the child's existence is entirely dependent on the parent.

NO.7 In an approval process, what happens when a queue is selected as the approver?

- A. The queue requires unanimous approval from all of its members before the record is approved.
- B. Any member of the queue can approve or reject the record and the queue is treated as a single entity.
- C. Only the queue owner is notified about the approval request, not its members.
- D. The queue can only be used for objects that do not support individual user approvals.

Answer: B

Explanation:

Salesforce allows Queues to be designated as assigned approvers in an approval process. When a record is submitted for approval and routed to a queue, an email notification is sent to all queue members (depending on queue settings). The core behavior is that any member of the queue can "claim" the request and either approve or reject it. Once one member takes action, the step is considered complete, and the queue is treated as a single decision-making entity. Unanimous approval (Option A) is a specific setting for multiple individual assigned approvers, but it does not apply to queues in this way. Option C is incorrect because the purpose of a queue is to notify all

members to ensure a timely response. Queues are supported for most standard and all custom objects (negating Option D).

NO.8 Ursa Major Solar classifies its accounts as Silver, Gold, or Platinum Level. When a new case is created for a Silver or Gold partner, it should go to the Regular Support Queue. When an account is Platinum Level, it should automatically go to the Priority Support Queue. What should a Platform Administrator use to achieve this?

- A. Escalation Rules
- B. Assignment Rules
- C. Case Rules
- D. Workflow Rules

Answer: B

Explanation:

Case Assignment Rules are the standard Salesforce tool for automatically routing cases to specific users or queues based on record criteria. A single assignment rule can contain multiple "Rule Entries" processed in a specific order. To meet this requirement, the Platform Administrator would create a rule with two entries: one that checks if the Account's "Level" field equals "Platinum" and routes it to the Priority Support Queue, and another that checks if the level is "Silver" or "Gold" and routes it to the Regular Support Queue. This automation happens the moment the case is created, ensuring that high-value customers receive immediate attention from the appropriate team. Escalation Rules (Option A) are used to move a case after it has been sitting for a period of time, not for initial routing. Workflow Rules (Option D) are a legacy tool that cannot natively assign cases to queues in the same direct manner as Assignment Rules.

NO.9 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

Explanation:

The core logic of any approval process is contained within its Approval Steps¹⁸. While the overall process defines the "Entry Criteria" for which records can start the process, the individual Approval Steps are what define the actual "chain of approval"¹⁹¹⁹¹⁹. Each step can have its own specific criteria to determine if a record should enter that particular step or skip to the next one. Furthermore, the Approval Step is where the administrator specifies the Assigned Approver, whether it be a specific user, a manager, or a queue. This granularity allows for complex routing, such as sending small discounts to a manager but large discounts to a VP. Process Definition Detail (Option A) provides a high-level overview of the process settings. Entry Criteria (Option C) only act as the initial gatekeeper. Approval Actions (Option D) are the automated results (like email alerts or field updates) that happen once a step is decided.

NO.10 A Platform Administrator is creating a new action instruction for an agent. This action, named createCase, is designed to generate a new Salesforce Case record based on the user's conversation

with the agent. Which set of Action Instructions should the administrator use for the createCase action, according to best practices for action instructions?

- A.** "This action provides the ability to create a new case record in the Salesforce system. Its function is to simply save customer information as a record. Use this when the user wants to create a case."
- B.** "Use this action to create a new Salesforce Case record. The goal is to document a customer's issue in the system. Use this when the user's intent is to create a formal record of their problem or question."
- C.** "Creates a new case record in the system for any type of customer inquiry. The purpose of this is to ensure a record of the interaction is saved."
- D.** "The createCase code snippet is configured to create a case. It runs in the background to handle the user's request to log a new issue. Its purpose is to solve the customer's issue."

Answer: B

Explanation:

Best practices for Agentforce Action Instructions emphasize clarity, intent, and specific usage scenarios to help the LLM (Large Language Model) understand exactly when and why to trigger an action¹³. Option B is the best choice because it explicitly defines the Action (create a Case), the Goal (document a customer's issue), and the User Intent (formal record of a problem or question)¹⁴. High-quality instructions act as a guide for the agent's reasoning process¹⁵. Vague instructions, like those in Option A or C, may lead to the agent triggering the action at inappropriate times, such as during a simple inquiry that doesn't require a formal case. Instructions that focus on "code snippets" (Option D) are less effective because the LLM needs to understand the functional business context rather than the technical implementation details to interact naturally with the user¹⁷.

NO.11 Ursa Major Solar has its business hours set from 9:00 AM to 5:00 PM for the reps that are on Pacific Time. The reps on Eastern Time need business hours set to start 3 hours earlier to cover for support. How should a Platform Administrator solve for this issue?

- A.** Adjust the current business hours to accommodate the Eastern time zone.
- B.** Allow the reps to set business hours manually.
- C.** Set temporary business hours for each time zone.
- D.** Create one set of business hours per time zone.

Answer: D

Explanation:

Salesforce allows for the creation of multiple Business Hours records to support global teams working in different time zones. To solve the requirement for Ursa Major Solar, the Platform Administrator should create two distinct sets of business hours: one for "Pacific Support" (9 AM - 5 PM PT) and one for "Eastern Support" (9 AM - 5 PM ET). This is essential because Business Hours are used by the system to calculate escalation rules and milestones correctly. For example, an escalation rule for an Eastern-based case should start counting at 9 AM ET, not 9 AM PT. Adjusting the current record to "accommodate" both (Option A) would result in a 12-hour window that doesn't accurately reflect either team's true availability. Users cannot manually set their own business hours (Option B) in a way that affects system automation. Creating one set per time zone ensures that the support team's performance metrics and automated routing are accurate and localized.

NO.12 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

Explanation:

In the Salesforce Lightning Experience, the buttons and actions that appear in the header (Highlights Panel) of a record are controlled by the Salesforce Mobile and Lightning Experience Actions section of the Page Layout. If a specific action like "Log a Call" is missing, it is usually because it has not been dragged into this specific section in the Page Layout editor. While standard actions sometimes appear in the Activity component (Option A), they are explicitly configured for the header via the Page Layout. There is no specific "Log a Call permission" (Options C and D) that would hide only that button; if a user has permission to create Tasks, they generally have the ability to use the Log a Call feature if it is present on the layout.

NO.13 A Platform Administrator needs to create a new prompt template to automatically summarize customer cases for a sales team. The administrator wants to dynamically populate the response with data from the case record. What should the administrator use to display real Salesforce data in an agent response from a prompt template?

- A.** Flow
- B.** Picklists
- C.** Agent Instructions
- D.** Merge Fields

Answer: D

Explanation:

When building prompt templates within the Prompt Builder, the most direct way to inject specific record data into the AI's instructions is through Merge Fields. Much like an email template or a mail merge, merge fields allow the administrator to reference specific fields from the object in context-in this case, the Case object. For example, an administrator might use `{!$Input:Case.Subject}` or `{!$Input:Case.Description}` within the prompt template. When the agent runs, it replaces these placeholders with the actual data from the specific case record being viewed. This ensures that the AI has the "grounding" information it needs to generate an accurate and relevant summary. While Flows (Option A) can be used for more complex data retrieval, Merge Fields are the standard, low-code tool for simple record-to-prompt data population. Agent Instructions (Option C) provide the "how-to" logic for the AI but do not themselves represent the dynamic data points from the Salesforce database.

NO.14 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

Explanation:

In Salesforce, Trusted IP Ranges (configured under Network Access in Setup) define a set of IP addresses from which users can log in without being prompted for a verification code (identity confirmation). In a call center environment where reps use different machines but are all within the same corporate network (sharing a common external IP or range), adding those corporate IPs to the Trusted IP Ranges list "streamlines" the login process. This prevents the system from seeing each new machine as an "unrecognized device". Multi-factor Authentication (Option C) actually adds an extra step to the login process, which is the opposite of streamlining. Profiles (Option A) and Permission Sets (Option D) can manage "Login IP Ranges" (which restrict access to specific IPs), but Trusted IP Ranges are the primary tool for bypassing identity verification within a known network.

NO.15 Cloud Kicks uses the standard Account Type field to indicate different account tiers. Users find this confusing, so management has asked that the field be changed to read "Tier" on the page layouts. How should a Platform Administrator implement this change?

A. Edit the Type field and change the name.

B. Use Rename Tabs and Labels.

C. Build a custom field called Tier and delete Type.

D. Create a global picklist value set.

Answer: B

Explanation:

To change the display name of a standard field (like "Account Type") globally across the entire organization, the correct tool is Rename Tabs and Labels in the Setup menu. This tool allows an administrator to modify the singular and plural labels for standard objects and the field labels for their standard fields. By renaming "Type" to "Tier," the change will be reflected on page layouts, in report column headers, and in list views. This is the preferred method because it preserves the underlying data and logic associated with the standard field. Option A is incorrect because standard field names cannot be edited in the "Fields and Relationships" menu. Option C is a destructive and complex process that would require data migration and could break existing reports or integrations. Option D does not address the label of the field itself.