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Salesforce CRT-211

Version Demo

Total Demo Questions: 30

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Topic Break Down

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QUESTION NO: 1

Which two ways can an administrator review the page performance for a Lightning record page?

Choose 2 answers

A. Lightning Usage App

B. Analyze Button

C. Activation Button

D. Pages Menu

ANSWER: A B

Explanation:

Administrators can review Lightning record-page performance from the Lightning Usage App and with the Analyze Button in Lightning App Builder. The Lightning Usage App provides the Lightning Page Performance dashboard, which reports performance data for Lightning record pages that users access. It helps an administrator identify pages with slower load experiences and view performance information across the organization, so it is useful for ongoing monitoring and prioritizing optimization work.

The Analyze Button is available while editing a Lightning record page in Lightning App Builder. It runs page analysis for that page's current configuration and identifies potential performance concerns, including factors related to the page's components and fields. This allows an administrator to evaluate the impact of a page design before activation or after making changes, then refine the layout to improve users' page-load experience. Together, the Lightning Usage App supplies organization-level observed performance data, while the Analyze Button supplies page-design analysis directly in the builder. Salesforce documents these tools in its Analyze Your Lightning Record Pages guidance and the Lightning Usage App documentation.

QUESTION NO: 2

Cloud Kicks (CK) is working on adding a Knowledge base to its online customer community. The administrator suggests using Salesforce Knowledge to meet this requirement.

What are three reasons CK should utilize Data Categories when creating articles in Knowledge?

Choose 3 answers

A. Up to five Data Category groups can be created for segmentation.

B. Data Categories help organize the Knowledge base content displayed.

C. Every article is required to have a Data Category for sorting.

D. Data Categories provide a way to secure access to the Knowledge base content.

E. A Knowledge article can be tagged to more than one Data Category.

ANSWER: B D E

Explanation:

Data Categories help organize the Knowledge base content displayed because they provide a structured, hierarchical classification system for articles. Cloud Kicks can define meaningful groups and categories—such as product lines, regions, or support topics—then associate articles with them. This structure helps customers browse and filter knowledge content in the customer community, making relevant answers easier to find.

Data Categories provide a way to secure access to the Knowledge base content through category visibility settings. Salesforce administrators can assign visibility for category groups to roles, permission sets, and profiles, allowing the organization to control which audience can view articles classified under particular categories. This supports audience-specific knowledge experiences without requiring separate article repositories.

A Knowledge article can be tagged to more than one Data Category, allowing a single article to be discoverable through multiple relevant paths. For example, an article about configuring a product for a particular region can be classified under both the product and regional category structures. This improves findability while enabling consistent organization and access control. See Salesforce Trailhead's Data Categories in Knowledge unit and Knowledge Visibility guidance.

QUESTION NO: 3

An administrator created and activated several record-triggered flows that are configured to run before the record is saved on the same object.

What should the administrator consider about the order of execution for flows?

A. The flow type will determine the order of execution.

B. The last created date of the flow will determine the order.

C. The order of flow execution is unpredictable.

D. The flows will execute in alphabetical order based on their names.

ANSWER: C

Explanation:

The order of flow execution is unpredictable. Before-save record-triggered flows are optimized to update the triggering record efficiently, but merely activating several such flows on the same object does not establish a dependable execution sequence. When flows have no explicitly assigned trigger order, Salesforce treats them as unordered; their relative run order is not guaranteed. Administrators therefore must not build logic that depends on one unordered flow's field updates being available to another unordered flow in a particular sequence.

Where the business process requires a defined sequence, the administrator should assign trigger-order values in Flow Trigger Explorer. Salesforce executes ordered flows according to those values for the applicable object and trigger context. This lets related automation be deliberately sequenced instead of relying on behavior that can vary. A practical design is to use explicit ordering for flows with dependencies and to keep each flow focused on a clear responsibility. Salesforce's record-triggered automation documentation describes trigger order and the treatment of unordered flows: Order of Execution for Record-Triggered Flows. For configuration details, see Set Trigger Order for Record-Triggered Flows.

QUESTION NO: 4

Ursa Major Solar (UMS) wants to identify customers that need to install a new solar panel monitor system it recently released. UMS tracks the installed products as Asset records that art related to the Account. Sales management has asked the administrator to create a report for users.

What is the recommended method for the administrator to meet the requirement?

A. Use PREVGROUPVAL() in Report Builder.

B. Use Role Hierarchy filter to restrict related records.

C. Use a Summary report with Bucket Columns.

D. Use a Cross Filter with WITHOUT logic.

ANSWER: D

Explanation:

Use a Cross Filter with WITHOUT logic. A cross filter lets an administrator build a report based on the existence, or absence, of related records. Because UMS stores each customer's installed products as Asset records related to an Account, the report can start with Accounts and apply a filter for accounts without a related Asset matching the newly released solar panel monitor system. This returns the customer accounts that do not yet have that installation recorded and are therefore appropriate candidates for outreach. Administrators can further narrow the related Asset criteria using subfilters, such as Product, Product Family, asset name, status, or installation-related fields available in the organization. The result is a maintainable declarative report: users can see the customer population directly without exported data, formulas intended for aggregate comparisons, or manual reconciliation of Account and Asset lists. Cross filters are designed specifically for reporting on parent records according to whether related child records do or do not exist. Salesforce describes cross filters and their subfilters in its Cross Filters documentation. For additional reporting configuration guidance, see the Salesforce Reports and Dashboards Trailhead module.

QUESTION NO: 5

Ursa Major Solar uses the custom object Product Development to track Ideas R&D is wording on. A former administrator added the custom object Potential Name with a lookup to Product Development to allow R&D to track names under consideration for those product. The R&D manager recently ran a record and noticed several potential names where the relationship to the Product Development record was missing. The current administrator needs to change this relationship to master detail to ensure a potential name only exists when there is product development.

Which two options are available for altering the existing Potential Name records for the deployment of this change to be successful?

Choose 2 answers

A. Move any Potential Name records with blank lookup fields to the recycle bin.

B. Assign any Potential Name records with blank lookup fields to an existing record from Product Development.

C. Remove any existing data in the lookup field n Potential Name records

D. Remove the lookup field from the page layout so the data is maintained without changes.

ANSWER: A B

Explanation:

Changing a lookup relationship to a master-detail relationship requires every existing child record to have a value in the relationship field. A master-detail child cannot exist independently: each Potential Name record must be associated with one Product Development record. Therefore, the administrator can assign every Potential Name record that currently has a blank lookup to an appropriate existing Product Development record. This preserves the Potential Name data while satisfying the required-parent condition needed for conversion.

The administrator can alternatively move Potential Name records with blank lookup fields to the Recycle Bin. Once those orphaned records are removed, all remaining Potential Name records have a parent Product Development record, allowing the relationship conversion to proceed. The administrator should review whether deleted records are still needed and, if so, associate them with the appropriate parent before conversion. After conversion, Salesforce enforces the parent-child dependency and the related record's ownership and sharing behavior is inherited from the master record. Salesforce documents the requirements and effects of relationship-field changes in Relationship Considerations and explains master-detail behavior in Master-Detail Relationships.

QUESTION NO: 6

The security department at AW Computing wants to prevent users from exporting more data than they need. Included in this request is limiting records containing sensitive information, such as bankaccounts and Personal Identifiable Information (PII).

Which feature should an administrator recommend to help limit what data is exported?

A. Salesforce Platform Encryption

B. Export Data Settings

C. Salesforce Shield

D. Muted Permission Sets

ANSWER: C

Explanation:

Salesforce Shield is the appropriate recommendation because it includes Event Monitoring and Transaction Security, which can be used together to identify and control potentially risky export activity. An administrator can create Transaction Security policies for report export events and define conditions that identify exports exceeding an acceptable record threshold or involving users and scenarios that require additional protection. When the policy criteria are met, Salesforce can block the export rather than merely recording that it occurred. This provides a preventative control at the time a user attempts to export data, helping reduce unnecessary disclosure of records that could include bank-account details or personally identifiable information.

Shield's event data also supports security investigation and ongoing monitoring, allowing the security team to review export behavior and refine policies as usage patterns change. The control is especially useful when standard object, field, and report access has already limited what users can view, but the organization also needs to govern the volume of data that can leave Salesforce in a single export action. Salesforce documents Transaction Security as a Shield capability for monitoring events and taking actions, including blocking activity, in its Transaction Security Trailhead module and its Event Monitoring Trailhead module.

QUESTION NO: 7

AW Computing has implemented the Contacts to Multiple Accounts functionality. Users should be able to distinguish between contacts and related contacts.

What should the administrator do to configure the account page layout?

A. Display both the contacts and the related contacts related lists.

B. Display the related accounts related list on the page layout.

C. Display the related contacts related list and add the direct field.

D. Display the contacts related list and add the related field.

ANSWER: C

Explanation:

Display the related contacts related list and add the direct field. Contacts to Multiple Accounts uses account-contact relationships to associate one contact with more than one account. On an account record, the Related Contacts related list provides visibility into contacts connected through these relationships, including both contacts whose primary Account Name is the current account and contacts associated with it through an additional relationship.

Adding the **Direct** field to that related list gives users the visual distinction requested. A checked Direct value identifies a contact directly associated with the account through its primary account relationship; an unchecked value identifies a related, or indirect, contact connected through an account-contact relationship. This lets users review the complete set of people related to an account while immediately understanding the nature of each association. The administrator configures the Related Contacts related list in the account page layout and selects Direct as a displayed related-list column. Salesforce describes these account-contact relationships and the direct relationship indicator in its Contacts to Multiple Accounts documentation. For additional administrative context on managing account and contact relationships, see the Salesforce Trailhead relationships unit.

QUESTION NO: 8

AW Computing wants to embed a report chart on the Account record page that shows the value of closed sales for that account. The chart should be limited to users in the Sales Manager role on the Account record pages.

how should this be accomplished?

A. Create a new report and assign it to the component.

B. Create a new page layout for the Sales Manager role.

C. Filter component visibility for the Account ID.

D. Filter component visibility for the Sales Manager role.

ANSWER: D

Explanation:

Filter component visibility for the Sales Manager role. is correct because Lightning App Builder can control whether an individual component on a Lightning record page is displayed by evaluating conditions about the current user. For the embedded report chart component, the administrator can create a component visibility rule using the user's Role field and set the condition to the Sales Manager role. As a result, users assigned to that role see the chart when viewing an Account record, while the component is not rendered for users outside that role.

The report chart itself should be based on a report configured to summarize closed-sales value and to provide account-specific context as required by the record-page use case. Component visibility is the appropriate page-level capability for restricting the chart's audience; it governs access to that visual component without requiring separate Account record pages or layouts solely for the role. Salesforce supports visibility rules for standard and custom components in Lightning App Builder, including conditions based on user attributes such as role. See Salesforce's guidance on [component visibility in Lightning App Builder]() and [visibility rules]().

QUESTION NO: 9

An administrator at Cloud kicks recently built a screen flow in a sandbox that creates a case and follow-up task. When the flow runs in the sandbox, it works just as expected. When tested in production, the flow errors when creating the records.

Choose 2 answers

A. Change the user experiencing the issue to the System Administrator profile.

B. Open the flow In Debug mode and Run the Flow as another user.

C. Change the Default Case Creator to the user's manager.

D. Log in as another user and run the flow.

ANSWER: B D

Explanation:

Open the flow In Debug mode and Run the Flow as another user. is an appropriate diagnostic step because it lets the administrator test the flow using the runtime context of a selected active user. This can reveal whether the production failure is tied to that user's access to create Case or Task records, access required by flow elements, or user-specific configuration and data conditions. Debugging also provides element-level detail that helps identify the precise operation at which the record creation fails.

Log in as another user and run the flow. is also useful because it reproduces the production experience in an actual user session. Comparing outcomes across users helps establish whether the failure is isolated to a particular user or permission setup, rather than being an issue inherent to the flow design. The administrator can then investigate the affected user's assigned permission sets, profile permissions, field access, and record access using the error details produced by the failed interview.

Salesforce recommends testing flows in the context of the users who will run them, particularly when a flow creates or updates records. See Salesforce's [Flow testing and debugging documentation]() and [flow execution context documentation]().

QUESTION NO: 10

The security department at AW Computing wants to prevent users from exporting more data than they need. Included in this request is limiting records containing sensitive information, such as bank accounts and Personal Identifiable Information (PII).

Which feature should an administrator recommend to help limit what data is exported?

A. Salesforce Platform Encryption

B. Export Data Settings

C. Salesforce Shield

D. Muted Permission Sets

ANSWER: C

Explanation:

Salesforce Shield is the appropriate recommendation because it includes Event Monitoring and Transaction Security, which allow an organization to monitor and control sensitive data-export activity. Event Monitoring captures user activity involving exports, including report exports and other download-related events, giving administrators the visibility needed to identify when data is being extracted and by whom. Transaction Security policies can then evaluate designated events in near real time and take protective action, such as blocking an export or requiring additional verification, when an export matches the organization’s risk criteria.

This capability supports a least-privilege approach: users can retain access to the records and reports necessary for their work while export activity involving sensitive datasets receives additional controls. Policies can be targeted to relevant users, event types, reports, network contexts, or other conditions, allowing AW Computing to focus protection on bank-account and PII-related information rather than applying a blanket restriction to every user action. Salesforce Shield also provides audit-quality event data that security teams can use for investigations and compliance monitoring. See Salesforce Trailhead’s Event Monitoring module and its overview of Salesforce Shield.

QUESTION NO: 11

Cloud Kicks has a custom object named Store Visit. Sales managers need to see a history of changes to the Visit Status and Follow-Up Date fields, including the user who made each change.

Which two actions should the administrator take? Choose 2 answers

A. Enable field history tracking for the Store Visit object.

B. Add the Store Visit History related list to the page layout.

C. Create a roll-up summary field on Store Visit.

D. Enable Setup Audit Trail for the object.

ANSWER: A B

Explanation:

The administrator must **enable field history tracking** for the Store Visit object and select Visit Status and Follow-Up Date as tracked fields. Field history tracking stores the prior and new values, the date of the change, and the user who made the change.

The administrator should also add the **Store Visit History related list** to the appropriate page layout so managers can view the tracked changes from the record. A report can be created for history data when needed, but the related list provides the requested record-level visibility. See Salesforce's Field History Tracking documentation.

QUESTION NO: 12

What should an administrator do to keep secure fields protected in email templates'?

A. Implement GDPR.

B. Set up an approval process for email alerts.

C. Remove the fields from the email.

D. Use classic encrypted fields.

ANSWER: D

Explanation:

Use classic encrypted fields. Classic Encryption encrypts supported custom-field data at rest and is designed for storing sensitive values, such as personally identifiable information, in Salesforce. When an administrator defines a custom field as encrypted, Salesforce applies encryption to the stored value and controls visibility of the unencrypted value through the *View Encrypted Data* permission. This creates an additional layer of protection beyond normal object- and field-level access controls, which is important when sensitive information could otherwise be exposed through automation or template-driven communications.

For email-template use, administrators should design templates with encrypted-field behavior and recipient exposure in mind, granting access to unencrypted values only where there is a valid business need. Encryption is therefore the relevant platform control for protecting the data itself while it is stored and accessed in Salesforce. Salesforce documents Classic Encryption, including its supported field types, access considerations, and functional limitations, in its Encrypted Custom Fields documentation. For broader guidance on selecting and managing Salesforce encryption capabilities, see the Salesforce Data Encryption Trailhead module.

QUESTION NO: 13

AW Computing (AVVC) has customers In multiple countries. AWC would li

Which two considerations should AWC be aware or prior to implementing this change to the existing system?

Choose 2 answers

A. When a currency is added to an organization's List of supported currencies, it cannot be deleted.

B. Opportunities will only display sales In the customer's localized currency.

C. Historical trend reports will only use the last dated exchange rate.

D. Once enabled, advanced currency management cannot be disabled.

ANSWER: A D

Explanation:

When a currency is added to an organization's List of supported currencies, it cannot be deleted is an important implementation consideration. Salesforce retains configured currencies to preserve the integrity of existing records, including records that may contain values in that currency. An administrator can make a currency inactive when it is no longer available for new use, but the supported-currency entry remains in the organization. This means the currency list should be planned carefully before currencies are activated.

Once enabled, advanced currency management cannot be disabled is also correct. Advanced Currency Management introduces dated exchange rates, allowing Salesforce to convert opportunity-related amounts using the rate effective for the relevant date rather than relying solely on static conversion rates. Because enabling this feature permanently changes how Salesforce maintains and applies currency conversion data for the organization, admins should review reporting, forecasting, integrations, and historical data requirements before enabling it. Salesforce describes Advanced Currency Management and its use of dated exchange rates in its currency management documentation. Additional implementation guidance is available in the Salesforce Trailhead currency management unit.

QUESTION NO: 14

Users report that the industry picklist field is no longer visible on account records. What test can an administrator use to troubleshoot the issue?

A. Field audit history

B. Setup audit trail

C. Field history tracking

D. Debug log

ANSWER: B

Explanation:

Setup audit trail is the appropriate troubleshooting resource because a field that was previously displayed and is now absent commonly reflects a recent configuration change. An administrator can review the Setup Audit Trail for changes made in Setup, including modifications that can affect whether users see a field on Account records, such as page-layout assignments, field-level security, record type configuration, or other metadata and administrative settings. The trail identifies the date and time of the change, the user who made it, the action taken, and often the affected setup component. This lets the administrator establish whether the Industry picklist's disappearance coincided with an administrator deployment or configuration update, then inspect and restore the relevant visibility setting if needed. Salesforce retains Setup Audit Trail history for a limited period, so it should be checked promptly after the issue is reported. The audit trail is accessed from Setup and can be downloaded for more detailed review. Salesforce documents the purpose and availability of this feature in its Setup Audit Trail documentation. For the related visibility controls an administrator may validate after identifying a change, see Salesforce's field-level security documentation.

QUESTION NO: 15

Cloud Kicks has an export of Order and Order Item data from an enterprise resource planning (ERP) system. The data must be imported into the Salesforce Order and Order Product objects, while maintaining the relationships in the data.

What are two ways the administrator should load the data?

Choose 2 answers

A. Use an Upsert operation to load data.

B. Use an Insert operation to load data.

C. Replace the Salesforce record ID with the External ID.

D. Map an External ID data value to the object.

ANSWER: A D

Explanation:

Use an Upsert operation to load data. is appropriate because upsert uses a Salesforce record ID or an external-ID field to identify whether an incoming row corresponds to an existing record. This makes the load repeatable and avoids creating duplicate Order records when data is reloaded from the ERP system. An administrator can define a custom external-ID field on Order that stores the ERP order identifier, then use that identifier as the upsert matching field.

Map an External ID data value to the object. is necessary to preserve the parent-child relationship between Orders and Order Products. The Order data should contain a stable external identifier, and each Order Product row should include the ERP identifier for its related Order. During import, Data Loader can use an external-ID relationship reference to resolve the parent Order rather than requiring the Salesforce-generated Order record ID in the source export. This approach supports loading related records from an external system while retaining their original relationship structure. Salesforce documents that upsert can match records using an external ID, and external IDs can be used to relate imported records to existing parent records. See Salesforce Data Loader: Upsert Records and Salesforce API: Relationships Among Objects.

QUESTION NO: 16

Universal Containers has a service-level agreement requiring high-priority cases to be escalated if they are not resolved within four business hours. The support manager must be notified when an escalation occurs.

Which two features should the administrator configure? Choose 2 answers

A. Business Hours

B. Escalation Rules

C. Case Assignment Rules

D. Case Auto-Response Rules

ANSWER: A B

Explanation:

Business Hours are correct because they define the service schedule used to calculate the four-hour escalation period. Business hours can account for the organization's working days, operating times, holidays, and time zone so cases are not escalated based on non-business time.

Escalation Rules are also correct because they evaluate Cases against time-based criteria and can perform escalation actions when the criteria are met. The administrator can configure a rule entry for high-priority cases, specify the four-business-hour age threshold, and use an escalation action to notify the support manager.

Assignment rules determine initial Case ownership, while auto-response rules acknowledge receipt of a Case. Neither feature performs time-based service escalations. See Salesforce documentation on Case Escalation Rules and Business Hours.

QUESTION NO: 17

Cloud Kicks (CK) wants the forecast numbers to be shown by territory regardless of who owns the record. CK also wants a way to forecast based on role hierarchy.

Which three options should an administrator recommend?

Choose 3 answers

A. Have the user select the forecast type listed under the Forecast Type in the Display Settings.

B. Enable Territory Forecast.

C. Make a custom field to track the amounts for Territory and Hierarchy Forecast.

D. Modify the Territory Forecast to match the Hierarchy Forecast model.

E. Enable Role Hierarchy Forecast.

ANSWER: A B E

Explanation:

Enable Territory Forecast because territory forecasts organize forecast totals using the territory hierarchy and territory assignments rather than relying solely on the opportunity owner's role. This gives Cloud Kicks a territory-oriented view of the pipeline and supports rollups through the territory structure, which is the appropriate model when forecast reporting must be aligned to assigned sales territories.

Enable Role Hierarchy Forecast because Collaborative Forecasts can also use the role hierarchy as the forecast hierarchy. This provides the separate owner-and-role-based forecasting approach Cloud Kicks requested, allowing managers to view and roll up forecasts through the organization's sales roles.

Have the user select the forecast type listed under the Forecast Type in the Display Settings. Once the relevant forecast types and hierarchies are available, users can select the applicable forecast type in the forecasts display to work with the territory-based or role-hierarchy-based forecast view. This lets the organization support both forecasting perspectives without requiring a custom amount-tracking field. Salesforce's Collaborative Forecasts documentation describes the supported forecast hierarchies and forecast-type configuration: Salesforce Help: Collaborative Forecasts Overview. See also the official Trailhead coverage of forecast setup and usage: Trailhead: Forecasts and Quotas.

QUESTION NO: 18

The administrator at AW Computing has been asked to review whether any users are making configuration changes directly in production.

Which item should the administrator review to find these details?

A. Setup Audit Trail

B. Field History Tracking

C. Login History

D. Organization-Wide Defaults

ANSWER: A

Explanation:

Setup Audit Trail is the appropriate item to review because it records configuration and administrative changes made in an org, including the user who performed the action and the date and time it occurred. This gives the administrator an auditable record for determining whether users are making changes directly in the production environment. The trail includes many setup-related actions, such as changes to users, permissions, security settings, customizations, and other organization configuration. Administrators can view recent entries from Setup and download the setup audit trail history for a longer review period, making it useful for governance, change-management reviews, and investigating unexpected production configuration changes. Salesforce retains setup audit trail history for up to 180 days in the downloadable file, while the Setup page displays a more limited recent history. Reviewing this trail allows AW Computing to identify exactly which user made a setup change and assess whether the change followed the organization's deployment and approval process. See Salesforce's Setup Audit Trail documentation and the Monitor Setup Changes documentation for details on accessing and using these records.

QUESTION NO: 19

The Cloud Kicks security team has seen an increase in unattended device attacks, where hackers can view sensitive information when users leave devices unlocked in public settings. The security team wants to ensure Salesforce data cannot be viewed after 10 minutes of inactivity.

What is the recommended security setting to configure?

A. Enforce login IP ranges on every request.

B. Lock sessions to the domain in which they were first used.

C. Require a high assurance session.

D. Force logout on session timeout.

ANSWER: D

Explanation:

Force logout on session timeout. is the appropriate setting because it ends the user's Salesforce session once the configured period of inactivity expires. An administrator can set the organization's session timeout value to 10 minutes in Session Settings, then enable the force-logout behavior so the inactive session is terminated rather than merely becoming inactive. This directly reduces the risk of a person viewing Salesforce records, reports, or other sensitive information on a device that was left unattended in a public location. When the original user returns, they must authenticate again before accessing Salesforce data, providing a practical control for protecting exposed workstations and shared or mobile devices. Session timeout settings apply at the Salesforce-org level and are designed specifically to manage the duration of inactive browser sessions. Administrators should also ensure the selected timeout aligns with the organization's security policy and user workflow needs, while using the shortest practical timeout for environments where unattended-device exposure is a significant concern. See Salesforce's Session Settings documentation and the session timeout guidance for configuration details.

QUESTION NO: 20

DreamHouse Realty currently deals only with single-family homes but is expanding its business it include condos in large cities. There are some features and amenities that inly apply to condos, such as the amount of a deposit and concierge services.

How should an administrator configure the Opportunity object to ensure that only relevant fields are displayed on the record?

How should an administrator configure the Opportunity object to ensure that only relevant fields are displayed on the record?

A. Build a Lightning component to display fields that only apply to condos.

B. Create a Record Type for the type of property and custom page layouts for each.

C. Configure a validation rule to display fields based on the type of property the user is viewing.

D. Make is custom Lightning page to display specific fields based on the type of property.

ANSWER: B

Explanation:

Create a Record Type for the type of property and custom page layouts for each. Record types let DreamHouse distinguish Opportunity records for single-family homes from those for condos. The administrator can then associate each record type with a dedicated page layout. The single-family-home layout can contain the standard and relevant property details, while the condo layout can include condo-specific fields such as deposit amount and concierge-service information. As users create a new Opportunity, selecting the appropriate property record type ensures that they see the matching layout; when viewing an existing record, Salesforce presents the layout assigned to that record's type. This configuration is declarative, maintainable, and directly supports different business processes or data requirements within the same object. Page-layout assignment can also vary by profile when different groups of users need different arrangements or levels of field access, while field-level security remains the mechanism for controlling whether users can access a field at all. Salesforce documents that record types can provide different business processes, picklist values, and page layouts, making them appropriate when an object needs distinct record experiences. See Salesforce Help: Record Types and Salesforce Help: Page Layouts.

QUESTION NO: 21

An administrator is preparing to deactivate a user who is leaving the company. The user owns Accounts and is the running user of a scheduled dashboard.

Which two actions should the administrator take before deactivating the user? Choose 2 answers

A. Transfer ownership of the user's records to an active user.

B. Change the running user of the scheduled dashboard.

C. Delete the user's profile.

D. Remove the user from the role hierarchy.

ANSWER: A B

Explanation:

The administrator should **transfer ownership of the user's records** to an active user. Records can remain owned by an inactive user, but transferring ownership supports continued business management, sharing, and reporting responsibilities.

The administrator should also **change the running user of the scheduled dashboard** to an active user or stop the dashboard schedule. A dashboard schedule cannot continue to run under an inactive running user. Reviewing scheduled jobs and ownership dependencies before deactivation helps avoid interruptions to business processes. See Salesforce's Deactivate Users documentation and Schedule Dashboard Refreshes.

QUESTION NO: 22

users at Northern Trail Outfitters have a lot of fields on their new account records because they track their accounts and competitors on the Account object. For accounts created for customers, they need access to different fields than the accounts used to track competitors. For partner accounts, they need different values in the Industry field.

What should the administrator use to resolve the issues?

A. Business Processes

B. Required Fields

C. Flow Builder

D. Record Types

ANSWER: D

Explanation:

Record Types are the appropriate solution because they let an administrator support distinct business scenarios on the same Account object. The administrator can create record types for customer, competitor, and partner accounts, then associate each record type with a tailored page layout. This controls which fields users see and can edit when creating or maintaining each kind of account, reducing unnecessary fields for each use case. Record types also allow the administrator to assign different picklist values by record type. Therefore, the Industry picklist can present values that are appropriate for partner accounts while maintaining different value sets for customer or competitor accounts. Record types can be made available to the relevant profiles or permission sets so users only select the account classifications they are authorized to use. This design preserves a single Account data model while delivering focused data-entry experiences and consistent picklist values for each account category. Salesforce documents that record types determine available picklist values and the page layouts available to users. See Salesforce Help: Record Types and Salesforce Help: Record Types and Picklist Values.

QUESTION NO: 23

What should the administrator consider before enabling Person Accounts?

A. Person Account cannot be disabled.

B. Person Account requires less data storage.

C. Person Account and Business Accounts cannot be in the same sharing model.

D. All standard Account news can be converted to Person Account field.

ANSWER: A

Explanation:

Person Account cannot be disabled. is the key consideration because enabling Person Accounts is a permanent, org-level change. Salesforce requires the feature to be enabled by Salesforce Support, and after it is enabled, the organization can't revert to an Accounts-and-Contacts-only data model. Administrators should therefore confirm that the business actually needs to represent individual consumers as accounts, rather than as contacts associated with business accounts, before requesting activation.

This decision affects configuration and long-term administration. Person Accounts combine account and contact characteristics in one record type, introduce person-specific standard fields, and require careful review of integrations, automation, page layouts, reporting, sharing design, and data-loading processes. A prudent approach is to validate the intended model and test relevant customizations and integrations in a sandbox before enabling the feature in production. Because the decision cannot be undone, stakeholders should agree on the business use case and the implications for future account-management processes.

Salesforce documents Person Accounts and their setup considerations in Person Accounts. For implementation guidance, see Trailhead: Person Accounts.

QUESTION NO: 24

A user at Universal Containers wants to load records Into a custom object named Location from a .csv file. While using Data Loader, they cannot find the Location object.

What are two reasons this is happening?

Choose 2 answers

A. The label of Location may have been changed.

B. Data Loader should only be used with standard objects.

C. Location has a master-detail field to Account.

D. The users profile needs create access to Location.

ANSWER: A D

Explanation:

The label of Location may have been changed. Data Loader identifies Salesforce objects through the API and presents the object names that are available to the running user. An administrator can change a custom object's singular or plural label without changing its API name. For example, an object originally created with the API name `Location__c` could be displayed under a different label in Data Loader, so searching for "Location" would not locate it. The administrator can confirm the object's label and API name in Object Manager, while the user can use Data Loader's object list or describe capabilities to identify accessible objects.

The users profile needs create access to Location. Data Loader operations run with the permissions of the user who logs in. To insert records, that user needs object-level Create permission for the custom object; applicable field-level security and access to referenced records are also evaluated during the load. Object permissions can be granted through the user's profile or a permission set, after which the object is available for the appropriate Data Loader operation. Salesforce documents Data Loader's support for both standard and custom objects and its reliance on the connected user's access rights in Data Loader documentation and explains object permissions in Object Permissions.

QUESTION NO: 25

The director of sales wants to make sure that every opportunity has either a sales engineer or an account executive assigned to the deal.

How should the administrator meet this requirement?

A. Write a validation rulethat checks if the fields are blank and require that one of them of completed in order to save the opportunity.

B. Create a different record type for deals with Sales Engineers and deals with Account Executives to capture one or the other.

C. Require theSales Engineer and the Account Executive lookup fields on the page layout.

D. Assign a task to the owner if an opportunity is created without one of these fields filled out.

ANSWER: A

Explanation:

Writing a validation rule that checks whether both assignment fields are blank and prevents the Opportunity from being saved is the appropriate solution. Validation rules evaluate record data when a user attempts to save a record and display an error message when the formula evaluates to true. The administrator can create a rule using a formula such as `AND(ISBLANK(Sales_Engineer__c), ISBLANK(Account_Executive__c))`, substituting the organization's actual API names for the two lookup fields. This formula is true only when neither a Sales Engineer nor an Account Executive has been assigned. The error message should clearly instruct the user to populate at least one of those fields, and it can be shown at the top of the page or next to a relevant field. Because the validation runs for new records and subsequent edits, it consistently enforces the director's required data-quality standard regardless of how the Opportunity is updated. Salesforce documents validation rules as a mechanism for enforcing business rules and preventing invalid data from being saved. See Salesforce Validation Rules Overview and Define Validation Rules.

QUESTION NO: 26

Cloud Kicks (CK) has a backup team of employees that helps short-staffed departments. These users could be working with sales one day and service the next. CK is implementing new Lightning record pages for each department so that they view records In a way that makes sense for each department.

How should the administrator ensure this Is configured correctly?

A. Configure one app per department and activate record pages for each app.

B. Create permission sets for each department and assign them to the backup team users.

C. Adjust the profile of the backup users each day to align with the proper access they require.

D. Allow the backup team users to update their own profile with Delegated Administration.

ANSWER: A

Explanation:

Configure one app per department and activate record pages for each app. Lightning record pages can be activated and assigned using criteria that includes the Lightning app in which a user is working. This lets Cloud Kicks create a Sales app and a Service app, then make the appropriate record page the default for that app. When a backup employee works with Sales, they open the Sales app and see the sales-oriented Lightning record page; when they support Service, they open the Service app and see the service-oriented page. The same user can therefore have a context-appropriate record experience without needing daily changes to their user setup.

This design is particularly suitable when the distinction is based on the department's working context rather than on a permanent user population. App-based activation controls the page presentation while users retain the access granted through their existing profile and permission sets. Administrators configure these assignments during Lightning record page activation in Lightning App Builder. Salesforce documents the available page-activation assignments, including app, profile, and record type, in its Lightning record page activation guidance. For practical configuration details, see the Salesforce Trailhead module on customizing record pages with Lightning App Builder.

QUESTION NO: 27

An administrator has found a free app on the AppExchanged and would like to install it.

Which three items should the administrator take to consideration before installed he managed package?

Choose 3 answers

A. Custom objects and custom fields used by the app count against the org's limits.

B. Managed apps do not undergo a formal security review by Salesforce.

C. Apps may require certain Salesforce editions or features to be enabled.

D. Apps may require external, third-party web services to function properly.

E. Apps must be installed in production before the app can be installed in a sandbox.

ANSWER: A C D

Explanation:

Before installing a managed package, the administrator should confirm that the organization has sufficient capacity for the package's components. Package-provided custom objects and custom fields contribute to applicable organization limits, so reviewing the package contents and current limit consumption helps prevent an installation from creating capacity issues. The administrator should also review the package's stated prerequisites. Some AppExchange apps support only particular Salesforce editions or depend on features that must be enabled in the target org, such as specific product licenses, permissions, or platform functionality. Finally, the administrator should understand whether the app relies on external, third-party web services. Such dependencies can require separate accounts, credentials, configuration, network access, ongoing vendor availability, and potentially additional security review before the app will operate as intended. Salesforce recommends reviewing an AppExchange package's listing, documentation, components, and installation requirements before deployment, ideally by testing in a sandbox first. See Salesforce's guidance on installing packages and its overview of AppExchange solutions.

QUESTION NO: 28

Cloud Kicks has organization-wide snaring defaults on the opportunity set to prvete. However, members of the finance team need to see closed won opportunities. The Drama team members all have roles under the finance director, while the sales team members have roles under the sales marager.

Which two options should the administrator use to meet these criteria?

Choose 2 answers

A. Share with roles and subordinates of the finance director role.

B. Make an owner-based sharing rule where the Won field = true.

C. Create a criteria-based sharing rule where the Won field = true.

D. Select all opportunities owned by the sales manager role.

ANSWER: A C

Explanation:

With Opportunity organization-wide defaults set to Private, users do not automatically have access to opportunities they do not own. A criteria-based sharing rule is appropriate because access must be granted according to an opportunity attribute: whether the opportunity is closed won. The administrator can define the rule criteria using the standard Opportunity *Won* field, setting it to true, so that the rule dynamically includes every opportunity that reaches the Closed Won stage. Salesforce evaluates criteria-based sharing rules as records are created or updated, allowing finance access to remain current as opportunities are won.

The rule should share the matching records with the finance director role and its subordinate roles. Because the finance team members are positioned beneath the finance director in the role hierarchy, selecting "roles and subordinates" grants access to the intended finance users. The administrator should grant the least level of access needed, typically Read Only when the stated requirement is to see the records. Salesforce documents criteria-based sharing rules and role-based recipient selection in its sharing-rule guidance: Salesforce Sharing Rules and About Sharing Rules.

QUESTION NO: 29

Cloud Kicks would like to reassign ownership of all leads that are open and more than 60 days old. The system administrator has written an assignment rule to distribute these leads to the correct owners or queues.

Which two tools should the administrator use to update the owner of these leads?

Choose 2 answers

A. Bulk API

B. Mass Update

C. Dataloader.io

D. Import Wizard

ANSWER: A B

Explanation:

Bulk API is appropriate for updating a large, filtered population of existing Lead records. A Bulk API job can include the ID of the lead assignment rule to run, allowing Salesforce to evaluate each updated lead against the organization's rule criteria and assign it to the designated user or queue. This approach is well suited to a potentially high-volume reassignment operation and can be run through an API-capable data-management process. Salesforce documents the Bulk API job property used to identify an assignment rule in its Bulk API job creation reference.

Mass Update is also suitable when an administrator can identify the qualifying leads in a list view and update them together. During a mass owner change for leads, the administrator can choose to apply the active assignment rule rather than selecting one fixed new owner. Salesforce then evaluates the assignment rule for each selected open lead and routes the leads individually to the intended owners or queues. This provides an administrative, user-interface-based way to apply the existing routing logic without editing every lead separately. Lead assignment rules are designed to automatically route leads to users or queues based on defined criteria; see Salesforce's Lead Assignment Rules documentation.

QUESTION NO: 30

Cloud Kicks (CK) does business directly with individual consumers (B2C) and large businesses (B2B). Some of CK's B2C customers are employed at its larger customer accounts and should be tracked under both.

Which two options will CK need to use to manage its customers' accounts?

Choose 2 answers

A. Contacts to Multiple Accounts

B. Leads

C. Person Accounts

D. Campaign Members

ANSWER: A C

Explanation:

Person Accounts are appropriate for Cloud Kicks' direct-to-consumer customers because they represent an individual rather than a business. A person account combines account and contact characteristics into one record, allowing the organization to store customer-specific information and conduct B2C sales and service processes without requiring a separate business account structure for every consumer. Salesforce supports person accounts specifically for organizations that operate in B2C scenarios alongside traditional business-account use cases.

Contacts to Multiple Accounts lets Cloud Kicks associate an individual contact with more than one account. After a person is represented in the account/contact model, this feature can identify the person's relationship to an additional business account, such as the large company where that consumer is employed. The relationship record can include a role and is designed to preserve the person's primary account relationship while making relevant associated accounts visible to users. Together, these capabilities support distinct consumer records while also capturing the individual's connection to a B2B customer account. See Salesforce's documentation on Person Accounts and Contacts to Multiple Accounts.