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Salesforce Plat-101

Version Demo

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Topic Break Down

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Topic 1, Salesforce Ecosystem	60
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QUESTION NO: 1

A Salesforce associate tries to create a new user in a sandbox using Astro©getdoudy.org as the username and it fails.

What is the problem with creating the Astro3getcloudy.org' username?

A. Salesforce usernames must include the user s full name and be formatted like an email address.

B. Salesforce usernames must be unique across all Salesforce orgs and that one is already in use.

C. Salesforce usernames must be formatted like an email address with.com at the end.

D. Salesforce usernames must be formatted like an email address and include an @ symbol.

ANSWER: D

Explanation:

The username **Astro3getcloudy.org** is invalid because a Salesforce username must be in an email-address format, which includes an **@** character. Although a Salesforce username does not have to be a real, deliverable email address, it must follow the general email-style syntax used for usernames. In this case, the value has text before and after a period but no @ symbol, so it does not meet Salesforce's username-format requirement. A valid format could look like *Astro3@getcloudy.org*. This requirement applies when creating users in sandboxes as well as production orgs. Salesforce also requires each username to be globally unique across Salesforce orgs, but the format issue alone explains why the username shown cannot be created. See Salesforce's guidance on adding users and the Trailhead module on user management.

QUESTION NO: 2

Which action(s) must be taken for Salesforce updates?

A. Updates are automatic; nothing needs to be downloaded or installed.

B. Updates require purchasing an updated license.

C. Updates need to be downloaded with each release

ANSWER: A

Explanation:

Updates are automatic; nothing needs to be downloaded or installed. Salesforce is a cloud-based service, so Salesforce deploys its seasonal releases to customer environments as part of operating the platform. Organizations do not download an installer, apply patches to servers, or perform a local software upgrade to receive the standard Spring, Summer, and Winter releases. This delivery model enables customers to receive platform enhancements, fixes, and new functionality without maintaining Salesforce infrastructure themselves.

Although no download or installation is required, responsible release readiness remains important. Administrators should review release notes, assess the potential effect of changed behavior or new features on their configuration and custom development, and test relevant business processes in a sandbox when appropriate. Salesforce also provides tools and communications to help customers prepare for release activity. Those readiness activities are distinct from installing the update: the core Salesforce release is delivered by Salesforce automatically. Some individual features or release updates can require administrator review, activation, testing, or action by a stated deadline, but that does not change the automatic nature of the platform release itself. See Salesforce's Release Notes and Release Updates documentation for release planning and feature-specific actions.

QUESTION NO: 3

A sales manager at Get Cloudy Consulting wants a report that shows their top-selling product families by quantity.

A. Group by opportunity stage> Filter by product family > Sum the total number sold

B. Group by product family > Filter to show only Closed Won opportunities >Sum the total number sold

C. Croup by active products > Filter to show opportunities this year > Sum the quantity

ANSWER: B

Explanation:

“Group by product family > Filter to show only Closed Won opportunities >Sum the total number sold” is correct because it organizes the report around the value the manager wants to compare: Product Family. Product Family categorizes products in the product catalog, so grouping opportunity line items by this field produces one summarized result for each family. The Quantity field on an opportunity product records the number of units associated with that line item; summing Quantity therefore measures units sold rather than revenue or number of opportunities. Filtering the underlying opportunities to Closed Won ensures that the quantities represent completed sales. The manager can then sort the Quantity subtotal in descending order to identify the highest-selling families. In Salesforce, this is typically built from an Opportunities with Products report type, which includes opportunity product fields such as Product Family and Quantity. Salesforce report builders support grouping records and summarizing numeric fields, including sums, to compare performance across categories. See Salesforce Trailhead’s guidance on creating and grouping reports: Customize Reports, and its overview of products and related opportunity product records: Set Up Products.

QUESTION NO: 4

A manager can see all of the records owned by their team, but not records owned by other teams.

How is access to the records being controlled?

A. Permission Sets

B. Profiles

C. Role Hierarchy

ANSWER: C

Explanation:

Role Hierarchy is correct because it grants record access based on a user’s position relative to other users in the organization. In a typical Salesforce role hierarchy, users higher in the hierarchy, such as managers, can access records owned by users below them, including members of their team. Access does not automatically extend sideways to users in separate branches of the hierarchy, so a manager would not inherently see records owned by another team at the same level or in a different reporting structure.

This behavior applies to record access and works alongside an organization’s sharing model. For objects that support role-hierarchy access, Salesforce uses the hierarchy to open access upward from record owners to their managers. This lets managers supervise team data without requiring individual record shares for every subordinate-owned record. The hierarchy therefore reflects the stated pattern precisely: visibility to records owned by the manager’s own team, but not to records owned by users in other teams. See Salesforce’s Role Hierarchy documentation and the Trailhead module on roles and the role hierarchy.

QUESTION NO: 5

What is the maximum number of rows a report will display?

A. 5,000

B. 3,000

C. 2,000

ANSWER: C

Explanation:

2,000 is the maximum number of detail rows Salesforce displays when a report is run in the report viewer. This display limit keeps interactive report execution and rendering responsive, particularly for reports that query large volumes of records. It applies to the rows visible in the report results rather than defining how many records can be included in the underlying report query or retrieved through other supported mechanisms.

When users need to work with more report data than can be shown on screen, Salesforce provides export capabilities with separate limits and behaviors. For example, an appropriately authorized user can export report details to analyze a larger result set outside the report viewer. Administrators and report builders should therefore distinguish the report viewer's row-display limit from export limits when designing reporting processes for high-volume data.

Salesforce documents report row limits and related reporting constraints in its Reports and Dashboards Limits reference. Additional guidance on running and exporting reports is available in the Exporting Reports documentation.

QUESTION NO: 6

Get Cloudy Consulting (GCC) wants to customize its Sales applicationâ€™s Home tab with additional components.

Outside of the org, where should GCC' Salesforce associate go to collaborate with others on solutions that might resonate with GCC users?

A. Explore documents In Help and Training.

B. Ask a question In a Trailblazer Community Group.

C. Search for modules in Trailhead.

ANSWER: B

Explanation:

Ask a question In a Trailblazer Community Group is correct because Trailblazer Community is Salesforce's external, peer-based collaboration space. It connects administrators, developers, consultants, partners, and other Salesforce customers who can share practical experience, configuration ideas, and implementation patterns. For a team considering additional Home tab components, posting a focused question in a relevant group lets the associate describe the business goal, ask how others have approached similar user experiences, and gather feedback from people who have implemented comparable solutions. This can help GCC identify ideas that are useful and appropriate for its users before building them in the org. Community participation also supports follow-up discussion, so the associate can clarify requirements and compare suggested approaches with the organization's needs. Salesforce describes Trailblazer Community as a place to connect with other Trailblazers, ask questions, and share knowledge. Learn more at Salesforce Trailblazer Community Groups and Trailblazer Community.

QUESTION NO: 7

A sales manager allows representatives to offer discounts up to 10% without review. Any discount greater than 10% must be submitted to the sales manager, who can approve or reject it before the opportunity progresses.

Which declarative feature should the Salesforce associate recommend?

A. An assignment rule

B. An approval process

C. A validation rule

ANSWER: B

Explanation:

An approval process is correct because it routes records through defined approval steps when they meet specified criteria. GCC can configure entry criteria for opportunities with discounts greater than 10%, assign the sales manager as the approver, and define actions for approval or rejection.

A validation rule can stop an invalid save but cannot obtain a manager's approval. An assignment rule is used to assign records, such as leads or cases, rather than manage approval decisions.

QUESTION NO: 8

Get Cloudy Consulting's growing marketing team is on a custom profile named Marketing Team.' The team currently has Read access to leads and opportunities- Two marketing managers need Edit access on leads.

What should the Salesforce associate do to grant them the access they need?

A. Create a permission set that grants Edit access to leads and assign it to the marketing managers.

B. Create a permission set that grants Edit access to leads and assign it to the marketing team.

C. Create a new profile that grants Edit access to leads and assign it to the marketing managers.

ANSWER: A

Explanation:

Create a permission set that grants Edit access to leads and assign it to the marketing managers. Permission sets are designed to extend a user's access without changing the permissions assigned through their profile. In this situation, the Marketing Team profile can remain unchanged with its existing Read access to leads and opportunities, while the two managers receive the additional object-level Lead permission required for their responsibilities. This follows Salesforce's recommended approach of using profiles for baseline access and permission sets to grant targeted, incremental privileges to particular users. The permission set should include the Lead object permission for Read and Edit, because object permissions are additive: a permission set can add access beyond the profile but cannot reduce access. After the permission set is assigned to each manager, Salesforce combines the permissions from the user's profile and assigned permission sets, enabling those users to edit Lead records when record-level sharing also allows access to those records. For more information, see Salesforce Help: Profiles and Permission Sets and Salesforce Help: Permission Set Overview.

QUESTION NO: 9

Get Cloudy Consulting requires a value in the Status field every time a record is created or edited.

What should they do to enforce this?

A. Make the field required in Object Manager.

B. Make the field required with a validation rule.

C. Make the field required in organization-wide defaults.

ANSWER: A

Explanation:

Making the field required in Object Manager is the appropriate declarative solution when Status must always contain a value. In Object Manager, an administrator can edit the field's properties and mark it as required. Salesforce then enforces completion of that field when users create or update records, preventing a record from being saved without a Status value. This is the most direct configuration for a universal field-level requirement and clearly communicates the requirement in the record-editing experience. It is especially suitable when the rule has no exceptions and does not depend on other field values, user attributes, or record state. Required-field configuration also helps ensure that downstream reporting, automation, and business processes can rely on Status being populated consistently. Salesforce distinguishes field requirements configured at the object-field level from requirements that apply only to particular page layouts, so configuring the field itself provides the intended broad enforcement. For details, see Salesforce's overview of custom fields and field property configuration guidance.

QUESTION NO: 10

Finance users need to view Account records, but they must not see the confidential Credit Limit field on those records. Other users should continue to see the field when appropriate.

Which Salesforce security feature should the administrator use?

A. Organization-wide defaults

B. Field-level security

C. A sharing rule

ANSWER: B

Explanation:

Field-level security is correct because it controls whether users can view or edit a specific field, regardless of whether they can access the record. The administrator can hide the Credit Limit field from finance users while leaving it available to authorized users.

Organization-wide defaults and sharing rules control access to records, not individual fields. Page layouts can remove a field from a page, but they do not prevent a user with field access from seeing the field through other Salesforce features.

QUESTION NO: 11

A marketing coordinator wants to invite qualified Leads to a webinar and measure how many invitees later become Opportunities.

Which Salesforce feature should the coordinator use to organize the invitees and track their responses?

A. A public group

B. A campaign

C. An account team

ANSWER: B

Explanation:

A campaign is correct because campaigns organize marketing initiatives and allow users to add Leads and Contacts as campaign members. Member statuses can record responses such as Sent, Registered, or Attended, and campaign reporting can help measure influence and outcomes.

A public group is used primarily for sharing and access management. An account team is used for internal collaboration on a particular Account rather than managing marketing audiences.

QUESTION NO: 12

Get Cloudy Consulting ' ^ ' s dashboard shows all of the company ' s key performance indicators (KPIs) in one view. The company ' s Salesforce associate is asked to add functionality that allows the dashboard to show all the same KPIs for each of the regions.

How should the associate add this functionality?

A. Create new dashboards for each region.

B. Add a Region filter to the dashboard.

C. Use an analytics package from the AppExchange.

ANSWER: B

Explanation:

Add a Region filter to the dashboard. A dashboard filter is designed to let viewers change which subset of dashboard data they see while retaining the same dashboard layout, components, and underlying KPI reports. The associate can configure a filter using a Region field and provide the relevant regional values. A user can then select a region, such as a sales territory or geographic area, and the dashboard refreshes its displayed values to reflect that selection across compatible components. This supplies an efficient, interactive view of the same KPIs for each region without requiring separate dashboard definitions or duplicating reporting work.

For dashboard filters to affect a component, the component's source report must contain a field that can be mapped to the dashboard filter. Salesforce supports mapping the dashboard filter to equivalent fields in the underlying reports, allowing a single regional selection to filter multiple KPI components together. This approach also keeps dashboard maintenance centralized: changes to the KPI layout, such as adding or updating a component, are made once and remain available for every region. Salesforce's guidance on creating and applying dashboard filters is available in the Salesforce Help documentation for dashboard filters and the Trailhead dashboard filters unit.

QUESTION NO: 13

Get Cloudy Consulting (GCC) wants to integrate its financial system with its Salesforce environment. After searching the AppExchange and reviewing documentation for its financial system. GCC did not find anything.

What should be used to build this integration?

A. Commerce Cloud

B. MuleSoft

C. Financial Services

ANSWER: B

Explanation:

MuleSoft is the appropriate choice because it is Salesforce's integration platform for connecting Salesforce with external applications, data sources, and systems when a ready-made AppExchange solution is unavailable. A financial system commonly contains important customer, account, invoice, payment, or transaction data that must be exchanged reliably with Salesforce. MuleSoft can build and manage APIs and integration flows to connect those systems, transform data between their differing formats, and orchestrate processes across both environments.

Using MuleSoft does not depend on finding a prebuilt package for the specific financial application. Its connectors, API-led approach, and support for common protocols let an organization integrate systems through available interfaces such as REST or SOAP APIs, databases, files, or messaging services. This makes it suitable when GCC must create a custom integration based on the financial system's documented capabilities. MuleSoft also supports reusable APIs and centralized management, which helps the integration remain maintainable as business requirements evolve. Salesforce describes MuleSoft as a platform for integrating applications, data, and devices, while its API-led connectivity model is designed to make those connections reusable and scalable. See Salesforce MuleSoft and MuleSoft API-led connectivity.

QUESTION NO: 14

Get Cloudy Consulting (GCC) needs an environment to onboard new hires as well as develop, implement, and test new requirements.

Which type of environment should OCC use?

A. Sandbox

B. Production

C. Trailhead Playground

ANSWER: A

Explanation:

Sandbox is correct because it is an isolated copy of a Salesforce organization intended for training, development, testing, and configuration work without putting live business data or production processes at risk. GCC can give new hires a safe place to learn navigation, data entry, and business processes while allowing its delivery team to build and validate new requirements before releasing them. Depending on the sandbox type selected, the organization can include metadata, sample data, or a copy of production data appropriate for the work being performed. This separation supports a controlled lifecycle: changes are developed and tested in the sandbox, then deployed to production after they have been validated. Salesforce also allows organizations to create multiple sandboxes for distinct purposes, such as individual development, integration testing, user acceptance testing, and training. Using a sandbox therefore provides the practical, nonproduction environment needed to support both onboarding and implementation activities while preserving the stability and integrity of the live organization. See Salesforce's Sandbox Overview and Trailhead guidance on sandboxes.