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Version Demo

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Topic Break Down

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QUESTION NO: 1

Dynamic Dashboards allow data to be displayed by the user viewing it, rather than by a specified running user - eliminating the need to create the same dashboard for multiple users.

A. True

B. False

ANSWER: A

Explanation:

True is correct. A dynamic dashboard runs as the logged-in viewer rather than as one fixed running user. Consequently, each viewer sees dashboard data according to that viewer's own record access, sharing settings, role, permissions, and field-level security. For example, a sales manager may see data for their team while an individual sales representative viewing the same dashboard sees only records they can access. This lets an administrator create and maintain a single dashboard for audiences who need the same metrics but have different levels of visibility, instead of cloning the dashboard and assigning each copy to a different running user.

Salesforce identifies this behavior through the "View dashboard as" setting, where selecting the dashboard viewer makes the dashboard dynamic. The dashboard's components still rely on their source reports and folders being accessible to viewers, so access should be configured appropriately before sharing the dashboard. Dynamic dashboards are especially useful for operational dashboards intended for managers, sellers, service agents, or other users who should evaluate their own accessible data in a consistent format. See Salesforce's Dynamic Dashboards documentation and the Salesforce Trailhead dashboard guidance.

QUESTION NO: 2

What is Sharing Rule?

A. Automated rules that grant access to groups of users

B. Exceptions to Org. wide Defaults

C. Rules given for group of user working closely on a project

D. Irrelevant for Public Read / Write Organizations

ANSWER: A B C D

Explanation:

Sharing rules are automated record-access rules that extend access beyond an object's organization-wide default sharing setting. They can grant additional read-only or read/write access to records owned by members of a public group, role, role and subordinates, or territory to another defined group of users. This makes "Automated rules that grant access to groups of users" and "Exceptions to Org. wide Defaults" accurate descriptions. Sharing rules are also commonly used when a defined group of users needs to collaborate on records associated with a project, such as allowing a project team to access records owned by another team. Therefore, "Rules given for group of user working closely on a project" describes a valid practical use of sharing rules. When an object's organization-wide default is Public Read/Write, all users already have read and edit access to its records, so sharing rules do not provide additional record-access benefit for that object. Salesforce documents that sharing rules open up access; they do not restrict access or make it more restrictive. See Salesforce Help: Sharing Rules and Salesforce Help: Record-Level Security and Sharing.

QUESTION NO: 3

Identify the statements that define Apex data loader?

A. Can be used to insert or extract SF records

B. Can be used to insert,update,delete or extract SF records

C. Can be used only to update and delete SF records

D. Can be used to read,extract and load data from CSV

E. Can be used to read,extract and load data from any MS office file

ANSWER: A B D

Explanation:

Salesforce Data Loader is a client application for bulk data operations. “Can be used to insert or extract SF records” is accurate because Data Loader supports importing records into Salesforce and exporting existing Salesforce records. “Can be used to insert,update,delete or extract SF records” correctly describes its core operations; Data Loader supports insert, update, upsert, delete, hard delete when enabled, and export operations. “Can be used to read,extract and load data from CSV” is also correct in practical terms because Data Loader uses comma-separated values files as its standard input format for import operations and produces CSV files for exported results. Administrators map CSV columns to Salesforce object fields, then run the selected operation against an object’s records. Data Loader is particularly appropriate for high-volume data processing and for repeatable import or export jobs. For details on supported operations, file handling, and Data Loader setup, see Salesforce’s Data Loader documentation and the Salesforce data import guidance.

QUESTION NO: 4

Can an end user import Members into a Campaign?

A. True

B. False

ANSWER: A

Explanation:

True is correct. A Salesforce user can add campaign members in bulk by using the campaign’s *Manage Members* functionality and selecting the option to import members from a file. This lets the user upload a CSV file containing leads, contacts, or other supported member information, then associate the imported records with the campaign. Salesforce creates the applicable Campaign Member records and enables the organization to track each member’s campaign status, such as Sent, Responded, or Attended.

The user must have the appropriate access to the Campaign object and relevant lead or contact records; in many organizations, this is granted through a Marketing User designation and assigned permissions. Administrators can also configure campaign member statuses and provide the access needed for users who manage marketing campaigns. Importing members is useful when a campaign audience originates outside Salesforce, such as from an event-registration list or an external marketing list. Salesforce’s campaign-management learning material describes adding members to campaigns and tracking their engagement: Salesforce Trailhead: Campaign Basics. For broader guidance on preparing and importing CSV data into Salesforce, see Salesforce Help: Data Import Tools.

QUESTION NO: 5

Universal Containers has two business groups, Products and Services. Both groups will be using opportunities to track deals, but different fields are required by each group. In which two ways should an administrator meet this requirement? (Choose two.)

A. Create two permission sets.

B. Create two page layouts

C. Create two lead processes.

D. Create two record types.

ANSWER: B D

Explanation:

Create two record types and create two page layouts. Opportunity record types enable an administrator to offer distinct business processes and different page layouts to users based on the type of deal being managed. In this case, separate Products and Services record types let users select or be assigned the appropriate opportunity classification, ensuring that each business group works with the configuration intended for its sales process.

Each record type can be associated with its own page layout. The Products page layout can contain and require the fields needed to qualify, price, and close product deals, while the Services page layout can present the fields needed for service engagements. Page-layout assignments are made by profile and record type, allowing the same Opportunity object to provide an appropriate user experience for each group without creating separate objects. This approach keeps reporting, automation, and pipeline management centralized on opportunities while tailoring the data-entry interface to the business context. Salesforce documents that record types determine the business processes and page layouts available to users, and page layouts control which fields users see and edit. See Salesforce Record Types documentation and Salesforce Page Layouts documentation.

QUESTION NO: 6

Ursa Major Solar wants to assist users with a guided expense report process to simplify

submissions, routing, and authorizations.

Which two tools should an administrator use to build this solution?

Choose 2 answers

A. Validation Rule

B. Flow Builder

C. Approval Process

D. Quick Action

ANSWER: B C

Explanation:

Flow Builder is appropriate for creating the guided user experience for expense report submission. A screen flow can present users with step-by-step screens, collect required expense information, apply business logic, create or update related records, and guide the user through a consistent submission process. Flows can also automate actions after submission, such as setting status values, notifying stakeholders, or preparing the record for review.

Approval Process is the Salesforce tool designed for routing records through formal authorization stages. For an expense report, an administrator can define entry criteria, submitters, assigned approvers, approval steps, and automated approval or rejection actions. This provides a controlled audit trail of who submitted, approved, rejected, or recalled the report, while ensuring expense reports reach the proper approvers according to the organization's policy. Used together, Flow Builder manages the guided submission experience and supporting automation, while an Approval Process handles the structured routing and authorization lifecycle. See Salesforce's Flow Builder documentation and Approval Processes overview.

QUESTION NO: 7

Which of the following can be used to create a back up of data from Salesforce?

A. Weekly Data Export

B. Data Loader

C. Import Wizard

D. Reports

E. Dashboards

ANSWER: A B D

Explanation:

Weekly Data Export, Data Loader, and Reports can each be used to retain copies of Salesforce data, with different scopes and levels of automation. Weekly Data Export is Salesforce's native export service: it creates downloadable ZIP files containing CSV files for selected Salesforce data and can be scheduled at the frequency available for the organization. This is an important native mechanism for obtaining a broad data extract for backup and recovery preparation.

Data Loader can export records from standard and custom objects into CSV files. Administrators can use it to create targeted exports, include specific fields, and repeat the process as part of an operational backup procedure. Reports can also be exported to spreadsheet-compatible formats, preserving the report's selected columns and filtered result set. That makes reports useful for retaining a focused copy of business data, such as a particular group of accounts, opportunities, or cases. In practice, a robust backup strategy should account for data relationships, attachments or files, metadata, and a tested restore process rather than relying on only one export type. Salesforce documents the native export service and its scheduling capabilities in Export Backup Data from Salesforce, and Data Loader export functionality in Export Data with Data Loader.

QUESTION NO: 8

Ursa Solar Major is evaluating a brand new Salesforce org for its service team and would like to

know what objects will be made available with out of the box Service Cloud.

Which three of the standard objects are available to an administrator considering a support use case?

Choose 3 answers

A. Account

B. Case

C. Ticket

D. Contract

E. Request

ANSWER: A B D

Explanation:

Account, **Case**, and **Contract** are standard Salesforce objects that support a typical Service Cloud implementation. Account records represent the customers receiving service, usually businesses but potentially individuals when person accounts are enabled. They provide the customer context for service activity and can be related to contacts, cases, assets, and contracts. Salesforce documents the Account object as a standard object in its Account object reference.

Case is the core record type for tracking a customer issue, question, or request through resolution. Service teams use cases to capture details such as status, priority, origin, and subject, and can apply case assignment rules, escalation rules, queues, and service processes. The Case object reference identifies it as a standard Salesforce object.

Contract is also a standard object and stores agreements between the company and an account. In a support scenario, contract information can help administrators and agents manage service entitlements and customer coverage dates. Together, these objects provide customer context, issue management, and service-agreement information for an out-of-the-box support use case.

QUESTION NO: 9

How can an Administrator customize campaign members? Choose 2 answers:

A. Display Lead or Contact data directly on a campaign member record

B. Create an approval process for new campaign members

C. Customize the campaign history related list to include campaign member custom fields

D. Display key campaign member data on an opportunity record

ANSWER: A C

Explanation:

Campaign Member is a standard junction object that connects a campaign with either a lead or a contact. Administrators can add custom fields to Campaign Member and use formula fields to surface relevant information from the associated lead or contact directly on the campaign member record. This allows marketers to view and report on lead or contact attributes in the context of a person's membership in a particular campaign, without duplicating that information manually.

Administrators can also configure the Campaign History related list on lead and contact page layouts. The related list can expose campaign member fields, including custom fields, so users can see campaign-specific details such as response information, attendance attributes, or other tracking values alongside each campaign history entry. This supports efficient review of an individual's campaign engagement while retaining the data at the Campaign Member level, where it belongs. Salesforce documents Campaign Member as the record that represents a lead's or contact's association with a campaign and supports custom fields and page-layout configuration. See Campaign Members and Customize Related Lists.

QUESTION NO: 10

A Platform Administrator is building an agent to nurture leads. How does Agentforce SDR help?

A. Generate a dynamic call script and talking points for the human sales reps to use.

B. Autonomously negotiate pricing with the lead and close the final deal.

C. Analyze the performance of human sales reps and provide coaching tips.

D. Answer the lead ' s questions with responses that are grounded in company data.

ANSWER: D

Explanation:

Answer the lead ' s questions with responses that are grounded in company data. Agentforce SDR is designed to engage prospective customers at scale, including responding to inbound questions and continuing conversations that help move leads toward qualification and a sales opportunity. Its value in lead nurturing is that it can provide timely, relevant answers without requiring a human sales representative to handle every initial interaction.

Grounding is especially important because the agent uses approved business information available through Salesforce, such as CRM data and connected knowledge sources, to formulate responses. This helps the organization make the agent's answers useful, context-aware, and aligned with the information it has authorized for customer-facing use. An administrator can configure the agent's topics, actions, instructions, and data access so its interactions support the organization's lead-engagement process. Salesforce describes Agentforce SDR as a sales-development agent that engages leads and answers prospect questions, while Salesforce's grounding guidance explains how trusted enterprise data improves agent responses. See Salesforce Trailhead: Agentforce SDR and Salesforce Help: Grounding Agentforce Responses.

QUESTION NO: 11

Which is a capability of Chatter? Choose 3 answers:

A. Receive updates related to records followed by a user

B. Share updates, files, and links with Leads and Contacts

C. Receive recommendations for users and records to follow

D. Follow people within Salesforce organization

E. Post updates, files, links to Chatter pages

ANSWER: A C D

Explanation:

Chatter lets users follow people and records in their Salesforce organization. When a user follows a record, relevant feed activity for that record, such as field changes and posts, can appear in the user's Chatter feed. This makes "Receive updates related to records followed by a user" a core Chatter capability. Chatter also supports following other people in the organization, allowing users to see posts and activity shared through those users' profiles and feeds.

Chatter Recommendations can suggest people and records for users to follow. These recommendations help users discover colleagues, records, and activity that may be relevant to their work, without requiring them to find every person or record manually. Together, record following, people following, and recommendations support Chatter's purpose as an internal collaboration and activity-awareness tool. Salesforce's Chatter documentation describes feeds, following people and records, and feed recommendations in its collaboration feature guidance. See Salesforce Help: Following People and Records and Salesforce Help: Feed Recommendations.

QUESTION NO: 12

SFDC allows me to add a reporting hierarchy (or organization chart) to my contacts. This way I can better understand the structural dynamics within the businesses I am selling to, and remember who to contact for certain aspects of a sale.

A. True

B. False

ANSWER: A

Explanation:

True is correct. Salesforce supports a reporting relationship among contact records through the standard *Reports To* field on Contact. This field is a self-lookup relationship: one contact can be designated as reporting to another contact. When these relationships are populated for contacts at the same customer organization, Salesforce can present the resulting Contact Hierarchy, helping sales teams understand reporting lines and organizational structure within an account.

This is useful for account planning and opportunity work because a rep can identify an executive sponsor, manager, technical evaluator, or day-to-day operational contact and see how those people relate to each other. The hierarchy is based on the contact records and their *Reports To* values, so maintaining accurate contact data is essential. Administrators can make the field available on appropriate Contact page layouts and ensure users have the necessary access to the relevant contacts. The Contact object reference documents *ReportsToId* as the field that identifies the contact to whom a contact reports: Salesforce Contact Object Reference. Salesforce also describes contact relationship and account-contact management concepts in its Contacts documentation.

QUESTION NO: 13

Data Validation Rules are executed for a field (vs. as record).

A. True

B. False

ANSWER: B

Explanation:

“False

” is correct because Salesforce validation rules are defined and evaluated at the record level, not executed independently for a single field. When a user creates or edits a record and attempts to save it, Salesforce evaluates the validation rule’s formula using the values available on that record, including the proposed new field values. The formula must return true for Salesforce to prevent the save and display the configured error message. Although an administrator can associate the displayed error message with a specific field, that placement affects where the user sees the message; it does not change the scope of the validation rule into a field-level rule. A single validation rule can also reference multiple fields, profile or user information, and functions, allowing it to enforce business requirements involving the overall record. For example, a rule can require a close date when an opportunity reaches a particular stage, or ensure that a field combination is valid before the record is saved. Salesforce’s documentation describes validation rules as checks that verify data entered by users meets specified standards before records can be saved. See Salesforce Validation Rules documentation and Trailhead: Validation Rules.

QUESTION NO: 14

Universal Containers administrator has been asked to create a many-to-many relationship

between two existing custom objects.

Which two steps should the administrator take when enabling the many-to-many relationship?

Choose 2 answers

A. Create a junction with a custom object.

B. Create two master detail relationships on the new object.

C. Create two lookup relationships on the new object.

D. Create URL fields on a custom object.

ANSWER: A B

Explanation:

A many-to-many relationship between two custom objects is implemented by creating a third custom object called a junction object. Each junction-object record represents one association between a record from each of the two original custom objects. For example, a junction object could store each individual enrollment that links one student with one course. The junction object must have two master-detail relationship fields: one to each of the existing custom objects. These master-detail fields establish the parent-child relationships needed to model the many-to-many structure and provide standard master-detail behaviors, including ownership and sharing inherited from the primary master record. Salesforce defines a junction object as a custom object with two master-detail relationships, and each master object can then be related to many junction records, thereby enabling many records on either side to be associated with many records on the other. See Salesforce’s many-to-many relationship documentation and the Salesforce data relationships Trailhead module.

QUESTION NO: 15

You can not use the browser's print function to print reports.

A. True

B. False

ANSWER: B

Explanation:

False is correct because Salesforce reports can be printed using the web browser's standard print capability. An administrator or user first runs the report and, where available, opens the report's printable view or otherwise prepares the report display for printing. The browser's Print command then sends that rendered report output to a printer or allows it to be saved as a PDF. This is useful when a report needs to be shared in a static, paper-friendly format without changing the report definition or exporting its data for further analysis.

Printing is distinct from exporting: printing preserves a presentation-oriented version of the report, while export produces a file such as CSV or Excel for use outside Salesforce. The exact appearance can depend on the report format, browser settings, page orientation, scaling, and whether report details are shown. Users must also have access to the report and the underlying data; printing does not bypass Salesforce sharing, folder access, or field-level security. Salesforce documentation describes report viewing and output actions, including exporting and printable report output, in its reporting guides. See Salesforce Help: Export Reports and Salesforce Help: Run and View Reports.

QUESTION NO: 16

Field Sets works on both Standard as well as Custom Objects?

A. True

B. False

ANSWER: A

Explanation:

True is correct. A field set is a named, reusable collection of fields defined on an object. Administrators can create field sets for custom objects and for supported standard objects, then control which fields are included and the order in which they appear. This makes field sets useful when a page, Visualforce page, or custom Lightning component needs a configurable group of fields without hard-coding each field name. For example, an administrator can change the fields exposed by a custom user interface by editing the object's field set, avoiding a code deployment for that layout-level adjustment. Field sets are managed from the object's setup details and contain references to fields belonging to that object, including standard and custom fields where applicable. Salesforce metadata documentation defines field sets as metadata associated with both custom objects and standard objects, although availability can depend on whether a particular standard object supports field sets. The statement is therefore valid as a general platform capability: field sets work with custom objects as well as supported standard objects. See Salesforce's Field Set metadata documentation and the Salesforce Help overview of field sets.

QUESTION NO: 17

Which of the following are true about formula fields?

A. They are read-only

B. They will not display on record edit pages

C. They will not display on record detail pages

D. They are not searchable

E. They will not display on reports

ANSWER: A B D

Explanation:

Formula fields are calculated, read-only fields: Salesforce derives their values from the formula expression and the values of referenced fields rather than accepting user input. Consequently, "They are read-only" is true. Because a user cannot supply or modify a calculated value, "They will not display on record edit pages" is also true; formula fields are intended to be viewed on a record rather than edited during record creation or update.

“They are not searchable” is true in the context of Salesforce search. Formula-field values are not indexed for standard Salesforce search, so users should not rely on global search or object search to find records from a formula result. Administrators can still expose formula results where they are useful for viewing, reporting, filtering, and automation design, while recognizing the search limitation. Salesforce’s formula-field guidance describes these fields as automatically calculated and read-only, and its search documentation explains the limits of searchable field data. See Salesforce Trailhead: Formula Fields and Salesforce Help: Searchable Fields.

QUESTION NO: 18

Which type(s) of file(s) is accessible through Content?

A. Audio Files.

B. PPT and Video files only.

C. Salesforce CRM Content can include all file types.

D. Files attached to a Chatter profile post.

E. Video Files.

F. Microsoft® PowerPoint presentations.

ANSWER: C

Explanation:

“Salesforce CRM Content can include all file types.” is correct because Salesforce Content is designed as a centralized file-management and sharing capability rather than a repository limited to a few document formats. Users can upload and share files such as presentations, PDFs, spreadsheets, images, audio, video, and other binary file formats, subject to the organization’s storage capacity, file-size limits, permissions, and any applicable security controls. In the Salesforce data model, a file’s version is represented by the ContentVersion object; its VersionData field stores the binary content of the uploaded file. This architecture allows Content to manage broadly different file formats under a common sharing and access model. Salesforce may provide enhanced previews or in-browser viewing for certain supported formats, but preview availability is distinct from whether a file can be stored and accessed through Content. Administrators should therefore understand that users’ ability to access a particular file also depends on Content permissions and the file’s sharing settings. See Salesforce’s ContentVersion object reference and the Salesforce Files and Content Trailhead module for the file-management model and sharing concepts.

QUESTION NO: 19

Which of the following can be done on the Activity Settings page at Your Name | Setup | Customize | Activities | Activity Settings?

A. Enable Group Tasks.

B. Mass transfer activities.

C. Enable Email Tracking.

D. Show Event Details on Multi-User Calendar View.

E. Enable Email Attachments.

F. Change the Activities page layout.

ANSWER: A C D E

Explanation:

The Activity Settings page controls several organization-wide behaviors for tasks, events, calendars, and email activities. **Enable Group Tasks.** is configured there to allow users to assign a single task to multiple people. **Enable Email Tracking.** is also an activity-level setting; it enables tracking information for emails sent from Salesforce where the applicable email features are in use. **Show Event Details on Multi-User Calendar View.** controls whether users can see event details when viewing calendars that display multiple users' events. **Enable Email Attachments.** is available in Activity Settings to allow users to include attachments when sending email from Salesforce, subject to the organization's email and file-access configuration. These settings affect the behavior of activity-related functionality across the org rather than changing an individual record's configuration. Salesforce documents activity configuration as part of its tasks, events, calendars, and email activity administration features. See Salesforce Help: Activities Overview and Salesforce Metadata API: ActivitySettings.

QUESTION NO: 20

Mail Merge is available in which Salesforce Editions?

A. All except Professional

B. Professional and Enterprise

C. Professional, Developer and Enterprise

D. Enterprise and Developer only

E. Developer, Enterprise and Unlimited only

F. All editions

ANSWER: F

Explanation:

All editions is correct. Salesforce makes its mail-merge capability available across Salesforce editions, so edition licensing is not the factor that determines whether an administrator or user can use the feature. Mail merge enables users to combine Salesforce record data with a document template to create personalized documents, such as customer letters, labels, envelopes, or similar communications. The resulting document can use merge fields that pull values from Salesforce records, helping users produce consistent, individualized output without manually retyping customer information.

In practice, successful use also depends on the relevant user permissions, access to the records and fields supplying merge data, and a compatible local document application where applicable. Administrators should confirm that users have the required object and field access and should test templates with representative records so that merge fields resolve as expected. These setup and access considerations affect an individual user's ability to perform a merge, but they do not limit the feature to a particular Salesforce edition. Salesforce's documentation describes mail merge and its supported setup in the Salesforce Help resources: Salesforce Help: Mail Merge and Salesforce Help: Customize Mail Merge.

QUESTION NO: 21

Sales users need to create a new contact from an Account record and automatically populate the contact's Account field.

Which two configurations should an administrator use?

Choose 2 answers

A. Create an object-specific quick action on Account.

B. Predefine the Account field value in the action layout.

C. Create a global quick action for Contact.

D. Add the Contact related list to the Account page layout.

ANSWER: A B

Explanation:

Create an object-specific quick action on Account provides users with an action from an Account record that creates a related Contact. Object-specific actions are designed for record-specific activities, including creating related records.

Predefine the Account field value in the action layout ensures that the Contact created from the Account uses the current Account record as its parent. The administrator can configure predefined field values for the quick action so users do not need to select the account manually. See Salesforce Help: Quick Actions.

QUESTION NO: 22

When a field is deleted from the pagelayout, does it is also deleted from the Object?

A. Yes

B. No

ANSWER: B

Explanation:

No is correct. In Salesforce, a page layout controls the arrangement and visibility of fields, buttons, related lists, and other components when users view or edit records. Removing a field from a page layout only removes that field from that particular layout's user interface; it does not delete the underlying field from the object or remove its stored data. The field remains available in Object Manager, can be placed back on the same layout or another layout, and may still be accessible through reports, APIs, list views, formulas, validation rules, Flow, or other configuration where applicable. This distinction lets administrators tailor record pages for different users and business processes without altering the object's data model. To permanently remove a custom field from an object, an administrator must delete the field itself from the object's Fields & Relationships settings, which is a separate action from editing a page layout. Salesforce describes page layouts as tools for controlling how fields and related information are organized for users, while object fields are managed independently in Object Manager. See Salesforce Help: Page Layouts and Salesforce Help: Delete Custom Fields.

QUESTION NO: 23

Where will a Campaign associated with a Lead be visible? Choose 2 answers

A. Campaign History related list

B. Campaign History Report

C. Lead History Report

D. Opportunity Related List

ANSWER: A B

Explanation:

When a Lead is added to a Campaign, Salesforce creates a Campaign Member record that links the Lead and the Campaign. The Campaign History related list is the standard place on the Lead record where users can review that Lead's campaign membership, including the campaign name, member status, and relevant response information. Administrators must ensure that the Campaign History related list is included on the appropriate Lead page layout for users to see it directly on the record.

Campaign membership can also be reviewed through a Campaign History Report. Reports based on campaign-member data allow users to identify which Leads are associated with campaigns and analyze member statuses, responses, and campaign engagement across many records rather than one Lead at a time. This supports both operational follow-up and marketing analysis. Salesforce documents that Campaign Members represent the Leads and Contacts associated with a campaign and that campaign reporting is available for analyzing those memberships. See Salesforce Help: Campaign Members and Salesforce Help: Campaign Reports.

QUESTION NO: 24

Which of the following is not part of the Profile?

A. User License

B. Page Layout

C. Record Types

D. Field Level Security

E. Roles

ANSWER: E

Explanation:

Roles is correct because roles are not a setting contained in a Salesforce profile. A profile is assigned to every user and establishes that user's baseline capabilities and access configuration, including the user license, object permissions, field-level security, record type availability, and page-layout assignments. These settings define what the user can do and, where configured, which fields and layouts are available when working with records.

A role is assigned separately from the profile and places a user in the role hierarchy. The role hierarchy is primarily used to extend record access upward through the organization's reporting and management structure. For example, users higher in a hierarchy can gain access to records owned by or shared with users below them, depending on the organization's sharing configuration. A user can have one profile and, when appropriate, one role; neither assignment is embedded within the other. This separation lets administrators manage functional permissions through profiles while managing record visibility through roles and sharing. Salesforce documents these as distinct parts of user access management. See Salesforce Profiles and Salesforce Roles and the Role Hierarchy.

QUESTION NO: 25

In Spring'11 salesforce.com release Dynamic Dashboards have been launched for which edition:

A. Developer Edition

B. Professional Edition

C. Enterprise Edition

D. Unlimited Edition

E. Enterprise Edition and Unlimited Edition

ANSWER: E

Explanation:

Dynamic Dashboards were introduced in the Spring '11 release for both Enterprise Edition and Unlimited Edition, so the accurate single answer must name those two editions together. A dynamic dashboard runs using the permissions and sharing access of the logged-in viewer, rather than always displaying data from one fixed running user's perspective. This enables different users to view the same dashboard while seeing only the records and metrics they are permitted to access. Salesforce identifies the feature as a way to provide role-appropriate dashboard visibility without creating separate dashboards for every audience. The historical Spring '11 release availability was Enterprise Edition and Unlimited Edition; therefore, selecting only one of those editions would not fully state the release entitlement described by the question. Dynamic dashboards remain subject to edition and org limits, including limits on the number of dashboards configured with a running user of "The dashboard viewer." Salesforce's current dashboard documentation explains the viewer-based running-user behavior and relevant configuration considerations. See Salesforce's Spring '11 dynamic dashboards announcement and Dynamic Dashboards documentation.

QUESTION NO: 26

Northern Trail Outfitters wants to initiate expense reports from Salesforce to the external HR

system. This process needs to be reviewed by managers and directors.

Which two tools should and administrator configure?

Choose 2 answers

A. Quick Action

B. Outbound Message

C. Approval Process

D. Email Alert Action

ANSWER: B C

Explanation:

Outbound Message and **Approval Process** should be configured. An Approval Process provides the structured, multistep review required for expense reports. Administrators can define entry criteria, assign approvers such as managers and directors, control the order of approval steps, and specify actions that occur while the record is pending, approved, or rejected. This ensures expense reports follow the organization's required authorization path before being finalized.

An Outbound Message supports the integration requirement by sending a SOAP message containing Salesforce record data to a designated external endpoint. It can be configured as an approval action, allowing Salesforce to notify the external HR system when an expense report reaches the relevant approval outcome. Salesforce sends outbound messages asynchronously and retries delivery when necessary, which makes the feature suitable for communicating approved expense-report information to an external system that exposes a compatible listener endpoint.

Using these tools together separates the internal governance workflow from the system-to-system communication: the Approval Process manages the manager and director review, while the Outbound Message transmits the relevant expense-report event and data to HR. See Salesforce's Approval Processes Trailhead module and the Outbound Messaging documentation.

QUESTION NO: 27

During a lead import, you can choose to enable active assignment rules as part of the import

A. True

B. False

ANSWER: A

Explanation:

True is correct. When importing lead records, Salesforce provides an option to apply the active lead assignment rule during the import. Selecting this option causes Salesforce to evaluate each imported lead against the criteria in the organization's active lead assignment rule. The matching rule entry determines the lead owner, which can be a user or a queue, and can also invoke the rule's configured email notification behavior where applicable.

This is useful when an administrator needs newly imported leads to follow the same routing process as leads created through web-to-lead, manual entry, or other normal intake channels. For example, imported leads can be routed by geography, product interest, lead source, or other values included in the import file. Salesforce allows one lead assignment rule to be active at a time, so the import uses that currently active rule rather than requiring record owners to be assigned manually in the source file. Before importing, the administrator should confirm that the active rule's criteria and assignment entries reflect the intended routing process. Salesforce documents assignment-rule processing for imported leads in its Lead Assignment Rules guidance and describes import behavior in the Data Import Wizard documentation.

QUESTION NO: 28

Which is true about a Chatter Plus user?

A. Contents, Ideas, Answers, Accounts, Contacts, Chatter, Groups, People, Profiles tab and up to ten Custom Objects only

B. Contents, Ideas, Answers, Accounts, Contacts, Chatter, Groups, People, Profiles tab and up to 20 Custom Objects

C. Accounts, Contacts and up to 10 Custom objects only.

D. It can access all that a Chatter Free user can, accounts and contacts and it can also access up to 10 custom objects only.

E. It can access all that a Chatter Free user can and it can also access up to 10 custom objects but not standard object.

ANSWER: D

Explanation:

"It can access all that a Chatter Free user can, accounts and contacts and it can also access up to 10 custom objects only." is correct. The Chatter Plus license was designed for users who primarily collaborate through Chatter but need limited access to CRM data. It includes the Chatter collaboration capabilities available to Chatter Free users, such as feeds, profiles, people, and groups. It additionally permits access to Accounts and Contacts, which supports collaboration around customer information without granting a full Salesforce user license.

A key limitation of Chatter Plus is that an administrator can provide access to no more than 10 custom objects. Access still depends on the user's assigned profile or permission sets and the organization's sharing configuration; the license establishes the maximum scope of objects that can be made available. This license is therefore appropriate for users who need to discuss and contribute around selected customer and custom-record data but do not require the broader functionality of a standard Salesforce license. Salesforce documents license capabilities and object-access constraints in its User License Types reference and its user access and license management guidance.

QUESTION NO: 29

At Universal Containers, a user's department determines which fields the user can see and edit on Opportunities. For example, users on the Sales team can edit all fields on the Opportunity, while users on the Support team have read-only access to these fields.

In which location is field-level security controlled for users on these teams?

A. Role

B. Sharing Rules

C. Profile

D. Public Groups

ANSWER: C

Explanation:

Profile is correct because profiles define users' baseline object and field permissions in Salesforce. For each field, an administrator can configure field-level security to determine whether users assigned to that profile can see the field and, when applicable, edit it. Universal Containers can therefore assign a Sales profile that grants visible and editable access to the relevant Opportunity fields, while assigning a Support profile that makes those fields visible but read-only. Field-level security applies consistently anywhere the field might otherwise appear, including record pages, related lists, search results, reports, and API responses, helping ensure that field access follows the user's job function rather than only a particular page layout. Salesforce recommends using profiles to establish the minimum access required for a set of users, then using permission sets or permission set groups when additional access needs to be granted to selected users. The key control for the described department-based visibility and editability is the field permission configured through the users' profiles. See Salesforce's Field-Level Security overview and Profiles documentation.

QUESTION NO: 30

How can an administrator capture custom lead data on the converted contact when converting a lead?

A. Map custom lead fields to standard contact fields.

B. Map custom lead fields to custom contact fields.

C. Use the data loader to move the custom lead data.

D. Use the lead conversion wizard to select the fields.

ANSWER: B

Explanation:

Map custom lead fields to custom contact fields. Salesforce lead conversion creates or associates an account, contact, and optionally an opportunity, and it can transfer values from custom fields on the lead to corresponding custom fields on the resulting records. An administrator configures this through the Map Lead Fields feature in Setup, where a custom lead field is mapped to a custom field with a compatible data type on Contact. Once the mapping is saved, Salesforce automatically carries the lead's value into the mapped Contact field whenever that lead is converted. This preserves business-specific qualification, source, preference, or other data collected during the lead process without requiring manual re-entry or post-conversion data migration. The target custom Contact field should be created before configuring the mapping, and the selected fields must be compatible for the mapping to be available. Salesforce supports mapping custom lead fields to custom fields on accounts, contacts, and opportunities as part of its standard lead-conversion behavior. See Salesforce's Map Custom Lead Fields documentation and the Convert Leads documentation.

QUESTION NO: 31

In order to Enable Territory Management you should have:

A. Standard Profile

B. Customizable Forecasting

C. Enable Forecasting

D. All of the above

ANSWER: B

Explanation:

Customizable Forecasting is the required choice in the context of the legacy Salesforce Territory Management feature referenced by this question. Territory Management historically worked with Salesforce forecasting by allowing forecast users and managers to roll up and view forecast information according to territory assignments rather than relying only on the role hierarchy. Therefore, an organization needed Customizable Forecasting available and enabled before enabling and using this territory-based forecasting model.

This prerequisite reflects the older, classic Territory Management setup and terminology used in Administration Essentials materials. Salesforce has since evolved its forecasting and territory products, including Enterprise Territory Management and Collaborative Forecasts, so an administrator working in a current org should review the applicable edition, feature availability, permissions, and setup considerations before implementation. The core concept tested here remains that the territory feature's forecasting integration depends on the customizable forecasting capability. Salesforce's territory-management documentation is available in the Territory Management guide, and current forecasting configuration guidance is in Salesforce Forecasts setup documentation.

QUESTION NO: 32

What are three characteristics of a master-detail relationship?

Choose 3 answers

A. The master object can be a standard or custom object.

B. Permissions for the detail record are set independently of the master.

C. Each object can have up to five master-detail relationships.

D. Roll-up summaries are supported in master-detail relationships.

E. The owner field on the detail records is the owner of the master record.

ANSWER: A D E

Explanation:

The master object can be a standard or custom object. In a master-detail relationship, the master is the parent record and the detail is the dependent child record. Salesforce supports this relationship type between custom objects and, where Salesforce permits it, with a standard object serving as the master. The relationship creates a close dependency between the records, including shared record access behavior.

Roll-up summaries are supported in master-detail relationships. A roll-up summary field is created on the master object and can calculate values from its related detail records, including a record count, sum, minimum, or maximum. This lets administrators display aggregated child-record data directly on the parent without custom automation.

The owner field on the detail records is the owner of the master record. More precisely, detail records do not maintain independent ownership; ownership and sharing are derived from the associated master record. As a result, users' ability to access a detail record follows their access to its master record. Salesforce documents these dependency and ownership characteristics as key behavior of master-detail relationships. See Salesforce relationship considerations and Salesforce roll-up summary fields documentation.

QUESTION NO: 33

The marketing director at Northern Trail Outfitters has requested that the budget field is populated in

order for the Lead Status field to be marked as qualified.

What tool should the administrator use to fulfill this request?

A. Lead Conversion.

B. Require Field.

C. Workflow Rule

D. Validation Rule

ANSWER: D

Explanation:

Validation Rule is the appropriate tool because the requirement is conditional: Budget must contain a value only when a user attempts to set Lead Status to Qualified. A validation rule evaluates field values whenever a lead is created or edited and prevents the record from being saved when its formula evaluates to true. The administrator can create a formula that checks whether Lead Status equals Qualified and whether the Budget field is blank. When both conditions are met, Salesforce displays a tailored error message, such as "Enter a budget before qualifying this lead," and requires the user to supply the value before saving.

This approach preserves normal data-entry flexibility: users can leave Budget blank while the lead is in other statuses, but cannot mark it Qualified until the required business information is present. Validation rules are designed to enforce this type of data-quality requirement consistently across the Salesforce user interface, imports, API-based updates, and other record-save operations. Salesforce documents validation rules as formulas that block saves and display an error when specified data conditions are violated. See Salesforce Help: Validation Rules and Trailhead: Enforce Data Quality with Validation Rules.

QUESTION NO: 34

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

A. The agent will pause the conversation and resume once reactivated.

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

C. The agent window automatically closes to prevent new messages.

D. The agent will send a system error message as a response to any new messages.

ANSWER: B

Explanation:

The agent will continue conversations using the deactivated agent until reactivated. Deactivation prevents the agent from being available for new conversations, but it does not disrupt conversations that are already in progress. Those existing sessions retain access to the agent configuration that was available when the conversation began, allowing users to complete their interaction without an unexpected interruption. This behavior is important when an administrator needs to make changes such as adding topics or actions: the administrator can safely update the agent while preserving continuity for users already receiving assistance.

After the administrator reactivates the agent, subsequent conversations can use the newly activated configuration, including the added topic and action. Administrators should therefore plan activation changes with the distinction between existing sessions and newly initiated sessions in mind. Salesforce's Agentforce learning materials describe agents as configured collections of topics and actions that are activated for use, while the platform's service capabilities are designed to maintain a consistent customer experience during active interactions. See Salesforce Trailhead: Agentforce Basics and Salesforce Help: Agentforce.

QUESTION NO: 35

You can set a default value for a custom field.

A. True

B. False

ANSWER: A

Explanation:

True is correct. Salesforce supports default values for many custom field types, allowing an administrator to prepopulate a value when a user creates a new record. This can reduce repetitive data entry, improve consistency, and ensure that users begin with an expected value. For example, a custom checkbox can default to selected or unselected, a picklist can default to a specified picklist value, and a date, number, currency, percent, text, or formula-supported field can use an appropriate default-value expression where Salesforce supports one. Default values are applied when the new-record page is opened; users can generally change the populated value before saving if the field is editable. Administrators configure a custom field's default value from the field definition in Object Manager. A default value is not a retroactive update mechanism: it does not populate existing records merely because the field configuration is changed. It is instead a data-entry convenience used for newly created records. Salesforce also supports formulas in applicable default-value settings, including expressions that can reference contextual information such as the current date or current user, subject to the syntax and field-type limitations documented for default field values. See Salesforce Help: Default Field Values and Salesforce Help: Create Custom Fields.

QUESTION NO: 36

The administrator at Ursa Major Solar imported records into an object by mistake.

Which two tools should be used to undo this import?

Choose 2 answers

A. Weekly Data Export

B. Mass Delete Records

C. Data Loader

D. Data Import Wizard

ANSWER: B C

Explanation:

Mass Delete Records and **Data Loader** are appropriate tools for removing records that were created by an accidental import. Mass Delete Records is an administrative setup tool that lets an administrator locate records for supported standard and custom objects using criteria, review the matching records, and delete them in bulk. This is useful when the mistaken import can be isolated with a field value, date, owner, or other filterable information.

Data Loader is also designed for high-volume data operations and can delete imported records in bulk. The administrator first identifies the Salesforce record IDs for the records introduced by the import, then supplies those IDs in a file for the Data Loader delete operation. This provides a controlled, repeatable way to remove a large import, particularly when more records are involved or when the records must be selected precisely. Deleted records are normally moved to the Recycle Bin, subject to Salesforce retention and organization settings. See Salesforce's Data Loader documentation and record deletion guidance.

QUESTION NO: 37

Which of the following objects support business processes?

A. Cases

B. Opportunities

C. Campaigns

D. Knowledge

ANSWER: A B

Explanation:

Cases and **Opportunities** support business processes in Salesforce. A business process defines the subset of values that users can select from a process-related standard picklist, and it is assigned through a record type. For Cases, the Case business process controls which Case Status values are available for records using a particular case record type. This lets an administrator present status values that fit distinct support workflows, such as customer service and internal support, while using the same Case object.

For Opportunities, the Sales Process controls the available Stage values for an opportunity record type. Administrators can therefore tailor stage progression to different sales motions, teams, or product lines. Record types connect the selected business process to users, ensuring that the relevant status or stage choices appear when those users create or edit records. Salesforce documents business processes as a record-type configuration feature and identifies opportunity sales processes and case processes as supported configurations. See Salesforce Help: Record Types and Trailhead: Record Types.

QUESTION NO: 38

A Standard Fiscal Year can start on May 1st.

A. True

B. False

ANSWER: A

Explanation:

True is correct. In Salesforce, a standard fiscal year consists of 12 consecutive calendar months and can begin on the first day of any calendar month. Therefore, an organization may configure its fiscal year to begin on May 1 and end on April 30 of the following calendar year. This is useful when the organization's financial reporting cycle does not align with the January-through-December calendar year, such as when its business, budgeting, or regulatory cycle begins in May.

An administrator configures the fiscal-year start month in Setup under Fiscal Year. Salesforce then uses that configuration to organize date-based reporting periods, including fiscal quarters and fiscal years, in reports, dashboards, forecasting features where applicable, and date formulas that use fiscal functions. A standard fiscal year retains normal calendar-month boundaries: selecting May means each fiscal month still starts on the first day and ends on the last day of that month. This differs from a custom fiscal year, which supports more specialized accounting structures, such as 4-4-5 week patterns. Salesforce documents that standard fiscal years can start in any month. See Salesforce Help: Set the Fiscal Year and Trailhead: Configure Reports and Dashboards.

QUESTION NO: 39

Which of the following are options when transferring accounts? (Choose all that apply.)

A. Transfer open opportunities

B. Transfer closed opportunities

C. Transfer closed cases

D. Transfer open cases

E. Keep Account Teams

F. Transfer custom objects

ANSWER: A C D E

Explanation:

Salesforce provides specific related-record choices when an administrator transfers an account from one owner to another. **Transfer open opportunities** is available so active sales work associated with the account can move to the new owner. **Transfer closed cases** and **Transfer open cases** are also available, allowing the administrator to move case ownership for both completed support history and active customer issues. The transfer process also offers **Keep Account Teams**, which preserves the account team members already assigned to the account rather than removing that established collaboration structure during the ownership change.

These selections are presented in the account ownership-transfer workflow and let an administrator decide how much related work should accompany the account. The choices are useful because account ownership can change for territory realignment, employee transitions, or reassignment of customer responsibility, while opportunities, cases, and team access may need to remain aligned with the new owner. Salesforce documents the available account-transfer behavior in its Transfer Accounts help topic. For broader guidance on ownership and record access administration, see the Salesforce Trailhead data security module.

QUESTION NO: 40

Once an opportunity reaches the negotiation stage at cloud kicks, The Amount fields becomes

required for sales users. Sales managers need to be able to move opportunities inti this stage without

knowing the amount.

How should the administrator require this field during the negotiation stage for sales users but allow

their managers to make changes?

A. Make the field required for all users.

B. Create to formula field to fill in the field for managers.

C. Assign the administrator profile to the managers.

D. Configure a validation rule to meet the criteria.

ANSWER: D

Explanation:

Configure a validation rule to meet the criteria. A validation rule can evaluate the opportunity's Stage value, whether Amount is blank, and the identity or access context of the user making the update. The administrator can make the rule display an error when a sales user changes an opportunity to Negotiation while Amount is blank, while excluding sales managers from that requirement. This enforces the requirement at the point records are saved, so it applies consistently whether users edit an opportunity in the standard interface, inline edit, or use another supported update path.

A maintainable implementation commonly uses a custom permission assigned through a permission set to identify users who may bypass the Amount requirement. The validation-rule formula can then check that the stage is Negotiation, Amount is blank, and the user does not have that custom permission. This avoids tying business logic permanently to a particular profile and lets administrators grant or revoke the exception without changing the rule. Salesforce validation rules are designed to prevent invalid data from being saved when specified conditions are met, and custom permissions can be referenced in formulas to support this type of controlled exception. See Salesforce Validation Rules and Salesforce Custom Permissions.

QUESTION NO: 41

What are three characteristics of a master-detail relationship?

Choose 3 answers

A. The master object can be a standard or custom object.

B. Permissions for the detail record are set independently of the master.

C. Each object can have up to five master-detail relationships.

D. Roll-up summaries are supported in master-detail relationships.

E. Detail records inherit ownership from the master record.

ANSWER: A D E

Explanation:

In a master-detail relationship, the master can be either a standard object or a custom object, provided that the relationship is supported for the objects involved. This lets an organization model dependent records around a central business record while using both Salesforce-provided and custom data structures. Master-detail relationships also support roll-up summary fields on the master object. A roll-up summary can calculate values from related detail records, including a count of records or the sum, minimum, or maximum value of a numeric field. This is a key feature for maintaining aggregate information directly on the parent record.

Detail records inherit ownership and sharing behavior from their master record. Detail records do not maintain independent ownership in the way independently owned records do; access to them follows the master record's access model. This inherited behavior reflects the close dependency between the records and helps ensure that users who can access the master receive the corresponding level of access to its details. Salesforce's relationship documentation describes both the inherited security behavior and the availability of roll-up summaries for master-detail relationships. See Salesforce: Custom Object Relationships Overview and Salesforce: Roll-Up Summary Fields.

QUESTION NO: 42

How many app exchange apps can you install in PE?

A. 5

B. 10

C. 15

D. 20

ANSWER: B

Explanation:

Professional Edition (PE) organizations can install up to **10** AppExchange apps/packages. This is an edition-level limit that an administrator should consider before selecting and deploying packaged solutions from AppExchange. An installed AppExchange app is generally delivered as a Salesforce package and can add custom objects, fields, automation, components, permissions, and other metadata to the organization. Because package installation can affect configuration, security review, and ongoing maintenance, admins should evaluate an app's documentation, required permissions, supported edition, and upgrade behavior before installation. The limit applies to the organization, rather than to an individual administrator or user, so all installed AppExchange packages count toward the same Professional Edition allowance. Salesforce publishes edition-specific capacities and other platform limits in its limits documentation. See Salesforce's Salesforce Platform Limits reference and the Install Packages documentation for package-installation guidance.

QUESTION NO: 43

In which two locations can a system administrator assign a page layout? (Choose two.)

A. Role

B. Profile

C. App

D. Record Type

ANSWER: B D

Explanation:

Page layouts are assigned through the combination of **Profile** and **Record Type**. A profile-based assignment determines which layout a user receives, while a record-type-based assignment determines which layout applies for a particular category of records. This pairing lets an administrator tailor the fields, sections, related lists, and standard or custom buttons shown to different groups of users when they work with different kinds of records. For example, users assigned one profile may receive a sales-focused layout for a business record type, while users with a service-oriented profile can receive a layout designed for a support record type.

In Setup, an administrator can manage these mappings from an object's Page Layout Assignment area, including by selecting a record type and assigning layouts across profiles. Record types also support associating page layouts as part of defining different business processes and user experiences. Salesforce documents that page-layout assignment is controlled by record type and profile, so both are valid locations and dimensions for configuring which layout users see. See Salesforce's Page Layout Assignments documentation and the Record Types documentation.

QUESTION NO: 44

Which of the following can NOT be edited on the Page Layout Editor?

A. Field positions

B. Buttons

C. Page sections

D. Related lists

E. Picklist values

ANSWER: E

Explanation:

Picklist values is correct because the Page Layout Editor controls the presentation and organization of a record page, rather than the set of available values stored in a picklist field. An administrator can use a page layout to arrange field positions, create and organize page sections, configure buttons and actions available from the layout, and add or configure related lists. These settings determine what users see and how record information is displayed in the Salesforce user interface.

Picklist entries are instead managed from the picklist field's definition in Object Manager. For fields that use record types, an administrator can also control which existing picklist values are available to each record type. This is field and record-type configuration, not a Page Layout Editor setting. Keeping value management separate from page design lets Salesforce preserve consistent field data definitions while allowing different layouts to present the same field in different ways for different users or business processes. See Salesforce guidance on page layouts and custom field attributes.

QUESTION NO: 45

Aw Computing needs to capture a loss reason in rich text field when an opportunity is Closed

lost.

How should an administrator configure this requirement?

A. Select the requirement checkbox next to the loss reason field on the page layout.

B. Create a validation rule to display an error if stage is Closed lost and Loss Reason is blank.

C. Check the required checkbox on the Loss Reason field in Object Manger.

D. Configure a workflow rule to display an error if Loss Reason is blank

ANSWER: B

Explanation:

Create a validation rule to display an error if stage is Closed lost and Loss Reason is blank. A validation rule evaluates the Opportunity whenever a user attempts to save it and can prevent the save when the record meets the specified condition. The rule should check that the Stage value is "Closed Lost" and that the Loss Reason rich text field has no value. For rich text fields, Salesforce recommends using the `ISBLANK()` function in the validation formula; for example: `AND(ISPICKVAL(StageName, "Closed Lost"), ISBLANK(Loss_Reason__c))`. The administrator can also provide a clear error message, such as "Enter a loss reason before closing an opportunity as Closed Lost," and place the message next to the Loss Reason field. This configuration makes the field conditionally required only for the Closed Lost stage, while allowing users to save opportunities in other stages without entering a loss reason. Validation rules are the declarative

Salesforce mechanism for enforcing data-quality requirements that depend on field values at save time. See Salesforce's [Validation Rules documentation] and the [custom field type documentation] for field behavior and configuration guidance.

QUESTION NO: 46

Which of the following is part of the Sales Cloud 2?

A. Accounts and Contacts

B. Cases

C. Marketing and Leads

D. Solutions

E. Content Library

F. Opportunities and Quotes

ANSWER: A C E F

Explanation:

Sales Cloud provides the core CRM capabilities used to manage a sales cycle, from identifying potential buyers through closing and maintaining customer relationships. **Accounts and Contacts** are fundamental Sales Cloud records: accounts represent companies or other organizations, while contacts represent the people associated with them. **Marketing and Leads** aligns with Sales Cloud's lead-management and campaign capabilities, which help teams capture prospects, qualify them, and convert qualified leads into accounts, contacts, and opportunities.

Opportunities and Quotes support active deal management. Opportunities track a potential sale through stages, amount, close date, products, and sales activities; quotes provide a customer-facing representation of the proposed products and pricing. **Content Library** supports sales productivity by making approved sales collateral and other content available for representatives to find and share. Together, these capabilities support the standard Sales Cloud process of managing customer data, generating and qualifying demand, advancing deals, producing proposals, and enabling sellers with relevant material. Salesforce describes these sales-focused CRM capabilities on its [Sales Cloud product page]; quote functionality is also covered in [Salesforce Help: Quotes Overview].

QUESTION NO: 47

Cloud kicks wants to track shoe designs by products. Shoe designs should be unable to be deleted,

and there can be multiple design for one product across various stages.

Which two steps should the administration configure to meet this requirement?

Choose 2 answers

A. Create a Custom Object for shoe design.

B. Configure a Custom Lookup Field for shoe design on the product object.

C. Add a custom master detail field for shoe design on the Product Object.

D. Use the Standard Object for designs.

ANSWER: A C

Explanation:

Create a Custom Object for shoe design. is appropriate because Shoe Design is business-specific information that is not represented by a standard Salesforce object. A custom object supplies a dedicated record type for attributes such as design name, stage, approval information, materials, or version details. It also permits the administrator to control access through object permissions. To make Shoe Design records unavailable for deletion, users who work with designs should not receive the Delete permission for the Shoe Design custom object through their profiles or permission sets.

Add a custom master detail field for shoe design on the Product Object. establishes the required parent-child data model when configured with Product as the master and Shoe Design as the detail. Each Shoe Design record is associated with one Product, while a single Product can have many related Shoe Design records. This supports tracking numerous designs for the same product at different stages and provides a related list of designs on the Product record. Master-detail relationships also provide consistent parent-based record access and reporting behavior for the child design records. Salesforce describes custom objects and their configuration at Create Custom Objects and explains parent-child relationship behavior at Object Relationships Overview.

QUESTION NO: 48

DreamHouse Reality needs to use consistent picklist value on a category filed on accounts

and cases, with value respective to record types.

Which two features should the administrator use to fulfill this requirement?

Choose 2 Answers

A. Dependent Picklist

B. Global Picklist

C. Multi-Select Picklist

D. Custom Picklist

ANSWER: B D

Explanation:

Global Picklist and **Custom Picklist** together meet this requirement. A global picklist, more precisely called a global value set in Salesforce, provides one centrally managed list of values that can be reused by picklist fields on multiple objects. The administrator can therefore use the same category values for the Account and Case fields, maintaining consistency and avoiding separate value lists that could diverge over time. Salesforce documents that changes to a global value set are reflected wherever that value set is used.

A custom picklist is the field type used to store the category on each applicable object. When creating the Account and Case category fields, the administrator can configure each custom picklist to use the shared global value set. Record types can then be configured with the appropriate available picklist values for each business process or category of record. This permits a common controlled value set across the two objects while allowing each record type to expose only the values relevant to it. See Salesforce's documentation on custom picklists and assigning picklist values to record types.

QUESTION NO: 49

Ursa Major Solar needs to ensure compliance with a platinum Service Level Agreement cases that remain in the Tier 2 queue for more than four hours must be re-assigned to the Tier 3 queue.

Which feature meet this requirement?

A. Case Comments

B. Case Assignment Rule

C. Case Escalation Rule

D. Auto Response Rule

ANSWER: C

Explanation:

Case Escalation Rule is the appropriate feature because escalation rules automatically evaluate open cases against defined criteria and take action after a specified amount of time. An administrator can create an escalation rule entry for cases associated with the Platinum SLA and define escalation actions to occur when a case has remained open for four hours. The escalation action can reassign the case owner from the Tier 2 queue to the Tier 3 queue, ensuring that cases requiring additional attention are routed according to the service commitment.

Escalation rules are designed for time-based case management. Their escalation actions can reassign a case, update fields, send notification emails, and create tasks. The elapsed time can be calculated using business hours, which allows the four-hour threshold to align with the organization's support schedule rather than counting nonworking time. This makes the rule suitable for monitoring unresolved cases and enforcing an SLA-driven handoff process automatically. Salesforce documents escalation rules and their time-triggered actions in the Escalation Rules documentation and in the Trailhead case escalation module.

QUESTION NO: 50

What is Force.com Platform? Choose 3 answers:

A. Customize, integrate and create enterprise applications as a service and without software.

B. Point-and-click customization tool

C. Customize standard applications provided by Salesforce.com or build their own on-demand applications

D. Modify the applications to meet your needs – (No- Coding)

E. Group standard and custom tabs into new custom applications

ANSWER: A C E

Explanation:

Force.com, now generally referred to as the Salesforce Platform, is Salesforce's platform-as-a-service environment for building, customizing, and integrating business applications in the cloud. "Customize, integrate and create enterprise applications as a service and without software." correctly captures the platform's cloud-delivered model: organizations use Salesforce-managed infrastructure rather than installing and maintaining application servers or platform software themselves. The platform supports both declarative configuration and programmatic development, enabling organizations to adapt Salesforce capabilities and create tailored solutions.

"Customize standard applications provided by Salesforce.com or build their own on-demand applications" is also correct because administrators and developers can extend standard Salesforce functionality with custom objects, fields, automation, user interfaces, security controls, and integrations, or create entirely custom applications on the same platform. "Group standard and custom tabs into new custom applications

" describes a supported application-building capability: custom apps can provide a focused navigation experience by organizing relevant standard and custom items for users.

Salesforce's platform overview describes the tools and services available for creating and extending applications: Salesforce Platform Overview. For details on configuring apps and navigation, see Salesforce Platform Development Overview.

QUESTION NO: 51

FILL BLANK

Before creating record types for Leads, Opportunities, Cases or Solutions, you need to create what?

A. Business processes

ANSWER: A

Explanation:

Business processes must be created before record types when the record type will control the values available in the standard process-related picklist for Leads, Opportunities, Cases, or Solutions. Salesforce uses business processes to define the applicable values for Lead Status, Opportunity Stage, Case Status, or Solution Status. A record type can then be associated with the appropriate process, allowing different groups of users or different workflows to use distinct sets of those values while sharing the same object.

For example, an organization might define separate sales processes with different opportunity stages for direct sales and partner sales. After those sales processes exist, each can be assigned to a corresponding Opportunity record type. This setup ensures that users see only the stages that apply to the type of opportunity they are creating or updating. The same dependency applies to lead, support, and solution processes. Salesforce's record type setup guidance identifies the process selection as part of record type creation for these objects. See Salesforce Help: Create Record Types and Trailhead: Set Up Record Types.

QUESTION NO: 52

Even a user with "View all data" (VAD) permission cannot view hidden folders as well as folders shared to no one.

A. True

B. False

ANSWER: A

Explanation:

True is correct. The View All Data permission provides broad access to records throughout the organization, but report and dashboard folder access remains governed by the folder's sharing and visibility settings. A folder that is hidden, or one that has not been shared with any users, roles, groups, or territories, is not made visible merely because a user has View All Data. This distinction protects the organization's report and dashboard organization model: record-level access and folder-level access are separate considerations. Administrators should therefore explicitly share report and dashboard folders with the appropriate users or groups when those users need to locate and run the contained reports or dashboards. View All Data can support access to underlying records when a report is run, but it does not override folder visibility configured to keep a folder hidden or unshared. Salesforce's report and dashboard sharing guidance describes folder access as a separately managed sharing control. See Salesforce Help: Share Reports and Dashboards and Trailhead: Share Reports and Dashboards.

QUESTION NO: 53

What type of relationship should be built for a one-to-one?

A. Master-Detail Relationship

B. Look-up Relationship

C. Master-Detail Field

D. Look-up Field

ANSWER: B D

Explanation:

A **Look-up Relationship**, implemented with a **Look-up Field**, is the appropriate Salesforce relationship type for modeling a one-to-one association between records. A lookup field stores a reference to a record in another object while allowing the related records to remain independently owned and managed. To make the association truly one-to-one, the administrator configures the lookup field so that each target record can be referenced only once, typically by making the lookup value unique where that option is available. The lookup can also be required when every record must have a corresponding related record.

This design is useful when two objects need to be connected without the dependency and ownership behavior that comes with a master-detail structure. For example, a custom profile-style object may hold one supplemental record for each parent business record. Salesforce describes lookup relationships as links between objects that do not affect ownership or security, and notes that relationship fields are used to connect records across objects. See Salesforce's Custom Field Types documentation and Trailhead data-modeling guidance.

QUESTION NO: 54

When Chatter is enabled in an org, the following happens (Choose all that apply).

A. The Chatter app is added to the Force.com app menu

B. The Chatter tab is added to all standard apps

C. Accounts, Contacts, Cases, Leads and Opportunities are enabled for Chatter

D. All users are added to the All Chatter group

E. All of the above

ANSWER: A B C

Explanation:

Enabling Chatter makes its collaboration interface available to users through Salesforce navigation. The Chatter app is added to the Force.com app menu, giving users a dedicated place to access their feed, people, groups, and other Chatter collaboration features. Salesforce also adds the Chatter tab to standard apps, allowing users to reach Chatter without first switching to the dedicated Chatter app.

In addition, Salesforce enables Chatter feed tracking for key standard CRM objects: Accounts, Contacts, Cases, Leads, and Opportunities. Feed tracking lets users follow records and see posts and tracked field changes in the record feed, which is the foundation for record-based collaboration. Administrators can subsequently review and configure feed tracking for supported objects and fields according to the organization's business requirements. These behaviors establish the baseline Chatter experience after it is enabled. See Salesforce's Chatter overview and Feed Tracking documentation.

QUESTION NO: 55

What are two considerations for the Org Recycle Bin? (Choose two.)

A. You can restore reports and dashboards.

B. Deleted records remain in the recycle bin for 15 days.

C. Records are permanently deleted when using the "Delete" button.

D. Records in the Recycle Bin count against your org's storage usage.

ANSWER: B D

Explanation:

Deleted records remain available in the Org Recycle Bin for 15 days, allowing an administrator to locate and restore eligible records during that retention period. This recovery window is intended to protect against accidental deletion while ensuring that deleted data is eventually removed permanently. Administrators can also permanently remove records before the retention period expires when appropriate, such as when storage needs to be reclaimed or data must be purged.

Records in the Recycle Bin continue to count against the organization's data-storage allocation until they are permanently deleted. Therefore, deleting large volumes of records does not immediately free data storage. An administrator should monitor storage usage and, when necessary, permanently delete unneeded recycled records after confirming they are no longer required. This behavior is an important operational consideration when managing data volumes, imports, and cleanup activities. Salesforce documents the Recycle Bin retention and restoration behavior in its Recycle Bin documentation; API-level permanent deletion is also described in the EmptyRecycleBin reference.

QUESTION NO: 56

Which of the following chart types does not support Combination Chart?

A. Line

B. Horizontal Bar

C. Vertical Bar

D. Funnel Chart

E. Donut

F. Line Cumulative

ANSWER: D E

Explanation:

Funnel Chart and **Donut** do not support combination charts. A combination chart is designed to plot compatible measures together on shared report groupings, typically displaying one measure as bars and another as a line. This format is useful when an administrator needs to compare related values that may have different scales, such as opportunity amount alongside opportunity count over time or by sales stage.

Funnel Chart and Donut use specialized visual models rather than the shared axes required by a combination chart. A funnel represents values as sequential stages in a process, while a donut represents proportional parts of a whole. Because these chart formats do not provide the category and value-axis structure needed to overlay bar and line measures, Salesforce does not make the combination-chart capability available for them.

When configuring dashboard components, admins should select a report and chart format whose grouping and measures support the intended comparison. Salesforce's charting guidance and dashboard documentation describe the available component chart types and configuration behavior. See Salesforce Reports Charting Overview and Salesforce Dashboard Components.

QUESTION NO: 57

A lead has been converted. Where can we find the campaigns associated with it? Select 2.

A. Campaign history list

B. Opportunity campaign related list

C. Contact campaign related list

D. Campaign history report

E. Campaign related list on account

ANSWER: B C

Explanation:

When Salesforce converts a lead, its campaign participation is retained through the records created or updated during conversion. The resulting contact retains the lead's campaign history, so the **Contact campaign related list** is the primary place to see the campaigns to which the individual was added as a campaign member. This preserves the person-level marketing engagement history after the lead record is no longer active.

If an opportunity is created during conversion, Salesforce can also associate campaign information with that opportunity. The **Opportunity campaign related list** exposes the campaign association for the sales record, including the campaign used as the opportunity's primary campaign source and, where campaign influence is enabled and configured, campaign attribution records. This allows users to review campaign association from both the converted person record and the resulting revenue opportunity. Salesforce documents that lead conversion carries campaign information forward to the contact and can populate the opportunity's campaign source from campaign history. See Salesforce Help: Convert Leads and Trailhead: Convert Leads.

QUESTION NO: 58

If you relabel a Standard Object the standard list views on every Salesforce tab will automatically be renamed.

A. True

B. False

ANSWER: B

Explanation:

False is correct because changing a standard object's label is a user-interface customization, not a global renaming operation for all existing list-view names. Salesforce lets an administrator rename standard object labels, tabs, and fields so that the terminology displayed in much of the application better matches the organization's business language. For example, an administrator can present Accounts using a business-specific label. However, list views are separately named records and their names are not universally and automatically rewritten merely because an underlying standard object has been relabeled.

This distinction matters when planning terminology changes. After relabeling an object, an administrator should review the list views users access and update applicable list-view names individually where needed. This helps ensure that the object's new business terminology is used consistently in navigation, list views, reports, documentation, and user training. Salesforce documents object-label customization through the Rename Tabs and Labels functionality and notes that the scope of label changes depends on the individual user-interface element. See Salesforce Help: Rename Tabs and Labels and the related Trailhead guidance: Rename Standard Objects and Fields.

QUESTION NO: 59

Identify the true statements about the workflow approval process?

A. When a record is submitted for approval the Admin can edit the record

B. You can forward an email approval request to another email address

C. The approvers delegate can also approve a request

D. Approvers can view an approval request from their home page

E. Approvers can only access an approval page from the application

ANSWER: A C D

Explanation:

When a record is submitted for approval, Salesforce commonly locks it to preserve the integrity of the approval process. System administrators retain the ability to edit locked records, allowing them to make necessary administrative corrections or manage exceptional circumstances while the record is awaiting a decision. Salesforce documents record locking as a standard capability of approval processes and explains the administrative control of locked records.

The approver's delegate can also approve a request when the approver has designated a delegated approver. Delegated approvers act on approval requests on behalf of the assigned approver, helping approval work continue when the primary approver is unavailable. The approval request remains associated with the configured approval process and is recorded through Salesforce's approval history.

Approvers can view pending approval requests from their Home page through the Items to Approve component. This provides a centralized worklist of requests requiring the user's action, from which the approver can open the underlying record and approve or reject it. See Salesforce's Approval Processes overview and its guidance on delegated approvers.

QUESTION NO: 60

If a user has public read-only access to records [that he/she does not own], the following are true.

A. The user can view the record but not edit it

B. The user can view and delete the record, but not edit it

C. The user can change the owner of the record

D. The user can search for the record

E. The user can report on the record

ANSWER: A D E

Explanation:

Public Read Only is an organization-wide default sharing setting that grants users who do not own a record read access to it. Consequently, "The user can view the record but not edit it" is correct: the user can open and inspect the record, but read-only access does not grant record-editing capability. Because the record is visible to the user, "The user can search for the record" is also correct. Salesforce search results respect the user's record access, so records to which the user has read access can be returned in search results.

"The user can report on the record" is correct as well. Public Read Only allows users to view and report on records that they do not own. In practice, the user must also have access to the relevant object and report type, plus the required permission to run reports; however, record-level visibility supplied by Public Read Only permits the record to be included in reports. Salesforce describes Public Read Only as allowing users to view and report on all records while preventing them from editing those records. See Salesforce Help: Organization-Wide Defaults and Salesforce Trailhead: Organization-Wide Defaults.

QUESTION NO: 61

Ursa Major Solar is using the content delivery feature of Salesforce Content.

What are two benefits of this feature? (Choose two.)

A. Associate the content delivery with a Salesforce record.

B. Use password protection for content deliveries that contain proprietary information.

C. Customize the URL assigned to the content delivery.

D. Encrypt certain content delivery files.

ANSWER: A B

Explanation:

Associate the content delivery with a Salesforce record is a benefit because a content delivery can be related to a Salesforce record. This gives users business context for an externally shared file and makes it possible to track the delivery in connection with the relevant customer, opportunity, case, or other record. Salesforce represents a delivery as a

`ContentDistribution` record, which includes a `RelatedRecordId` field for this relationship. This supports organized file sharing without requiring recipients to have Salesforce access.

Use password protection for content deliveries that contain proprietary information is also a benefit. A delivery creates a shareable link for external recipients, and password protection adds a recipient verification step before the delivered content can be accessed. Administrators and users can therefore share sensitive materials more safely while retaining the convenience of a web-based delivery. Salesforce also supports delivery controls such as expiration and tracking, helping the sender manage and monitor external access to shared content. See Salesforce's ContentDistribution object reference and the Salesforce Content Deliveries documentation.

QUESTION NO: 62

Ursa Major Solar uses data from the grand total of a custom report to create their dashboard. Which two components will populate the grand total properly? (Choose two.)

A. Metric

B. Chart

C. Table

D. Gauge

ANSWER: A D

Explanation:

Metric and **Gauge** populate properly from a report's grand total because both are designed to display one aggregated value. A metric component presents a single number from the source report, such as the record count, sum, average, minimum, or maximum selected for the dashboard component. When the report contains a grand total, the metric can directly display that overall result as a key performance indicator.

A gauge component likewise uses one summary value from the report and compares it with configured ranges and a maximum value. This makes it appropriate when Ursa Major Solar wants to visualize how the report's overall total is performing against a goal or threshold. The dashboard builder lets an administrator select the summarized field and aggregation that supplies this single value, including the report grand total. Salesforce documents metric and gauge components as dashboard visualizations for a single report value; the report must provide an appropriate summarized result for the component to display. See Salesforce's dashboard component documentation and the Reports and Dashboards overview.

QUESTION NO: 63

Which two objects are customizable the Stage Setup Flow?

Choose 2 answers

A. Leads

B. Campaigns

C. Opportunities

D. Campaign Members

ANSWER: A C

Explanation:

Leads and **Opportunities** are customizable through Salesforce's Stage Setup flow. This guided setup experience is designed to help an administrator align the sales team's working process with the values users select as a lead progresses or as a deal moves through the pipeline. For leads, the setup supports defining the lead-status values that represent qualification and follow-up progress. These statuses give sales users a consistent way to identify where a prospective customer is in the early sales lifecycle.

For opportunities, the flow supports configuring opportunity stages, including the stage names, their order in the sales process, associated probability, and forecast category. Those settings affect pipeline reporting, forecasting, list views, and the visual progression users see while managing deals. Salesforce describes lead processes and opportunity sales processes as the mechanisms used to control the available Lead Status and Opportunity Stage values for users. Administrators should therefore use these configurations to reflect the organization's actual qualification and revenue processes while maintaining consistent reporting. See Salesforce's Define Your Sales Process Trailhead unit and the Salesforce Help article on customizing sales processes.

QUESTION NO: 64

Which of the following statements is true about computer activation?

A. It may be required when accessing Salesforce from an additional, unrecognized IP address.

B. It is required for all IP addresses and browsers.

C. It is required to access SF online.

D. It is required to identify regular SF users.

ANSWER: A

Explanation:

It may be required when accessing Salesforce from an additional, unrecognized IP address. Computer activation is a security verification process that helps Salesforce confirm a user's identity when a login originates from an unfamiliar network location or browser. In the usual activation flow, Salesforce sends an activation code to the user's verified email address; entering that code establishes the new computer or browser as recognized for subsequent sign-ins. This provides an additional safeguard against unauthorized access when credentials are used from a location Salesforce has not previously recognized.

Whether the activation challenge appears is influenced by the organization's network-access configuration. Administrators can define trusted IP ranges at the organization level. Logins from addresses within those trusted ranges do not require activation, while logins outside them can trigger identity verification. This behavior allows an organization to reduce unnecessary activation prompts for known corporate networks while retaining stronger protection for unfamiliar locations. Salesforce documents trusted-network ranges and their effect on login verification in Trusted IP Ranges and describes the related login-security controls in Control Login Access.

QUESTION NO: 65

A Platform Administrator at Cloud Kicks has created an approval process for time-off requests. Which two automated actions are available for the administrator to add as part of the approval process?

A. Field Update

B. Email Alert

C. Chatter Post

D. Autolaunched Flow

ANSWER: A B

Explanation:

Field Update and **Email Alert** are standard approval-process actions that an administrator can configure for a time-off request. A field update can automatically set values on the submitted record at defined points in the approval lifecycle, such as setting the request status to Approved, Rejected, or Pending. This keeps the record's business status aligned with the outcome of the approval process and makes the result visible for reporting, list views, and downstream automation.

An email alert sends an email based on an email template to recipients defined by the administrator. For example, Cloud Kicks can notify the employee that submitted the request, the employee's manager, or another designated recipient when the request is submitted or reaches a final outcome. Email alerts support timely, consistent communication without requiring the approver to compose a message manually. Salesforce documents field updates and email alerts as available actions for approval processes, including initial submission and final approval or rejection actions. See Salesforce Help: Approval Processes and Salesforce Help: Initial Submission Actions.

QUESTION NO: 66

Cloud Kicks wants a reports to categorize accounts into small, medium, and large based on the

dollar value found in the Contract Value Field.

What feature should an administrator use to meet this request?

A. Detail Column

B. Bucket Column

C. Group Rows

D. Filter Logic

ANSWER: B

Explanation:

Bucket Column is the appropriate report feature because it lets an administrator group values from an existing field into meaningful, user-defined categories without creating a new formula field or changing underlying account data. For this request, the administrator can add the Contract Value field as a bucket field in the report and define value ranges that represent small, medium, and large accounts. For example, one range can include lower contract values as small, a middle range as medium, and higher values as large. The resulting bucket values can be displayed in the report and used for grouping, making the categories easy to review in report results and charts. Bucket fields are especially useful when the categorization is needed for reporting analysis rather than as a permanent data value on every account record. Salesforce documents that bucket columns categorize report values into groups defined directly in the report builder, including numeric ranges and other supported field-value groupings. See Salesforce Help's Bucket Fields in Reports and the Salesforce Reports and Dashboards Trailhead module for details on creating and using bucket columns.

QUESTION NO: 67

What information does the Company Profile Hold?

A. Language, Locale, and Time Zone

B. Licenses, Storage and Used Space

C. Fiscal Year

D. Forecasting

E. None of the above

ANSWER: A B C

Explanation:

The Company Profile, accessed through Company Information in Setup, centralizes core organization-level details that establish how Salesforce operates for the business. "Language, Locale, and Time Zone" is correct because these defaults determine regional presentation and timing behavior across the org, including date, number, and time conventions for users who have not selected personal overrides. “Licenses, Storage and Used Space” is also correct because Company Information displays the organization’s purchased and allocated licenses, as well as data and file storage consumption, helping administrators monitor available capacity and user entitlements. “Fiscal Year” is correct because fiscal-year configuration is an organization-wide company setting used by reporting, forecasting, and other date-based business processes. Administrators define the fiscal-year structure so that Salesforce can group and summarize data according to the company’s reporting calendar. Together, these settings represent foundational company information rather than record-specific configuration. Salesforce’s Trailhead overview of company-wide settings discusses maintaining company information and organization defaults, while the fiscal-year guidance explains the organization-level role of fiscal settings. See Salesforce Trailhead: Set Up Your Company Information and Salesforce Help: Define Your Fiscal Year.

QUESTION NO: 68

Multiple record types may be created for every tab with the exception of:

A. Home Tab

B. Forecast Tab

C. Documents Tab

D. Leads Tab

E. Report Tab

ANSWER: A B C E

Explanation:

Record types apply to supported Salesforce objects, where they let an administrator offer different business processes, picklist values, and page layouts to different users. They are not a configuration feature for general navigation or workspace tabs. **Home Tab**, **Forecast Tab**, and **Report Tab** are functional application tabs rather than record-based objects that support record-type configuration. **Documents Tab** provides access to stored document records and is also not among the standard objects for which Salesforce supports creating record types. Therefore, these tabs are the exceptions to the rule described in the question. In contrast, Leads is a supported standard object: organizations can use lead record types to distinguish lead processes, such as partner leads and direct-sales leads, and can assign the applicable record types to profiles. Salesforce’s object reference identifies the objects that support the RecordType feature, and its administrator learning material explains that record types control available picklist values and page layouts for records. See the Salesforce RecordType object reference and Salesforce Trailhead: Record Types.

QUESTION NO: 69

Cloud Kicks wants to leverage roll-up summaries on the Account object. Which standard object supports this roll-up summary natively?

A. Opportunity

B. Contact

C. Case

D. Campaigns

ANSWER: A

Explanation:

Opportunity is the standard object that can be summarized natively on an Account. Salesforce supports roll-up summary fields on Account for its related opportunities, enabling an administrator to calculate a count of opportunity records or derive aggregate values from qualifying opportunities, such as the sum, minimum, or maximum of an eligible field. For example, an administrator can create an Account-level roll-up summary that totals the Amount of related opportunities that meet specified filter criteria, or counts opportunities associated with each Account.

This capability is especially useful for account management and reporting because it keeps a current aggregate value directly on the Account record. The resulting field can be displayed on page layouts, used in reports, referenced by automation, and included in formulas or validation logic where appropriate. Although roll-up summaries are generally associated with master-detail relationships, Salesforce provides this native Account-to-Opportunity roll-up capability as a standard exception. Salesforce's field-type documentation identifies the Account object as supporting roll-up summaries for related opportunities, and Trailhead demonstrates creating summary values from opportunity data at the account level. See Salesforce Help: Roll-Up Summary Fields and Trailhead: Roll-Up Summary Fields.

QUESTION NO: 70

Which of the following statements is true about person accounts in backup exports?

A. If your organization uses person accounts and you're exporting contacts, person account records are included in the contact data. However, the contact data only includes the fields shared by contacts and person accounts.

B. If your organization uses person accounts and you're exporting contacts, person account records are not included in the contact data.

C. If your organization uses person accounts and you're exporting contacts, person account records are included in the contact data. The export includes all fields from person accounts.

ANSWER: A

Explanation:

If your organization uses person accounts and you're exporting contacts, person account records are included in the contact data. However, the contact data only includes the fields shared by contacts and person accounts. This is because a person account combines account and contact characteristics into one record, with the person-contact portion represented through the Contact object for relevant operations. When Salesforce prepares contact data for export, it includes the person-account contact representation so that contact-related information is retained in the exported dataset.

The export is intentionally limited to fields that are available to both standard contacts and person accounts. This keeps the contact export structurally consistent and avoids treating person-account-only attributes as ordinary Contact fields. Administrators planning a restoration, migration, or archival process should therefore export the relevant account data as well when they need the complete person-account record and all of its account-specific information. Salesforce's Data Export Service documentation describes the contents and behavior of exported files, while the platform documentation explains how person accounts combine account and contact data. See Export Backup Data from Salesforce and Salesforce Object Relationships.

QUESTION NO: 71

What can a user do an account record that has been manually shared read/write with him/her? (Choose two.)

A. View the account

B. Edit the account

C. Transfer the account

D. Delete the account

E. Share it to other users

ANSWER: A B

Explanation:

Manual sharing with Read/Write access gives the recipient access to open the account record and to make changes to that record, subject to the user's object-level permissions and field-level security. Therefore, **View the account** is correct because Read/Write includes the ability to read the shared record. **Edit the account** is also correct because the sharing access level explicitly grants edit capability for the record. Salesforce access is additive: a sharing rule or manual share can grant record-level access, while the user must also have the necessary Account object permissions to perform the corresponding action. Field-level security can still limit which individual fields the user can see or update, even when the account itself is shared with Read/Write access. This distinction is important for administrators because object permissions establish the maximum actions a user may take, and record sharing determines which specific records are available to that user. Salesforce documents that record sharing provides levels such as Read Only and Read/Write, with Read/Write enabling users to view and edit the shared record. See Salesforce: What Is Record Sharing? and Salesforce: Configure Record Access.

QUESTION NO: 72

An administrator at Cloud Kicks wants to deactivate a User who has left the company.

What are two reasons that would prevent a user from being deactivated?

Choose 2 answers

A. The user is part of a territory hierarchy.

B. The User is in a Custom hierarchy field.

C. The User is assigned in workflow email alert.

D. The User is the highest role in the role hierarchy

ANSWER: A C

Explanation:

A user who is part of a territory hierarchy cannot be deactivated until their territory-management assignment is addressed. Territory hierarchies use assigned users to support territory structure, access, and management processes, so Salesforce requires the administrator to remove or replace the user in that hierarchy first. Similarly, a user assigned in a workflow email alert cannot be deactivated while the alert still references that user as a recipient. The administrator must update the workflow email alert to use an active recipient or otherwise remove the user reference before completing deactivation. These safeguards prevent automation and territory-management configuration from retaining dependencies on an inactive user. After resolving the territory hierarchy and workflow email-alert references, the administrator can deactivate the departing user while preserving the user record and historical ownership information. Salesforce's user-deactivation guidance explains that active-user references in configuration must be resolved before deactivation, and the territory-management documentation describes the role of users in territory hierarchies. See Salesforce Help: Deactivate Users and Salesforce Help: Territory Management.

QUESTION NO: 73

Picklist dependency rules are not enforced during Import

A. True

B. False

ANSWER: A

Explanation:

True is correct. In Salesforce, a field dependency controls which values users can select in a dependent picklist based on the value selected in its controlling field during normal record entry and editing in the user interface. However, dependency mappings are not enforced when records are loaded through import processes, such as Data Import Wizard or Data Loader.

This means an import can supply a value for a dependent picklist even when that value is not one of the values currently made available by the controlling-field value in the dependency matrix.

The imported picklist value must still be an active, valid value configured for the dependent picklist field itself. Administrators should therefore validate source data before loading it, particularly where reports, automation, or business processes rely on the intended controlling/dependent value combinations. After import, reviewing exception records or using reports can help identify combinations that do not align with the organization's dependency design. Salesforce documents that field dependencies do not apply during imports in its guidance on field dependencies. For additional import-process context, see Salesforce's data import overview.

QUESTION NO: 74

Which of the following statements are true about Import wizard?

A. You can import Accounts, contacts, leads, solutions and custom objects using the Import wizard

B. You can work with both records of data and metadata

C. When importing data file size cannot exceed 100 MB and each record in the file cannot be bigger than 400 KB

D. Standard users can import up to 50000 account or contact records per session

ANSWER: A C

Explanation:

The Salesforce Data Import Wizard is intended for importing record data into supported standard objects and custom objects. Its supported standard-object coverage includes accounts, contacts, leads, and solutions; therefore, "You can import Accounts, contacts, leads, solutions and custom objects using the Import wizard" is a true statement. The wizard provides a browser-based guided process for mapping source-file columns to Salesforce fields, identifying duplicate records, and starting the import. Salesforce also documents import-file limits for this tool: a file can contain up to 50,000 records, the total file size can be no more than 100 MB, and an individual record can be no larger than 400 KB. Consequently, "When importing data file size cannot exceed 100 MB and each record in the file cannot be bigger than 400 KB" correctly states two applicable Data Import Wizard limits. These limits help administrators select the appropriate import tool and prepare source data before loading it. For Salesforce's current guidance on supported objects, import behavior, and limits, see Salesforce Data Import Wizard documentation and Trailhead: Import Data into Salesforce.

QUESTION NO: 75

You can create which of the following types of email templates? (Choose all that apply.)

A. Text

B. HTML with letterhead

C. JavaScript

D. Custom HTML

E. Text with letterhead

F. Visualforce

ANSWER: A B D F

Explanation:

Salesforce supports several classic email-template formats, including **Text**, **HTML with letterhead**, **Custom HTML**, and **Visualforce**. Text templates provide plain-text email content and can use merge fields to personalize messages with record, recipient, or sender data. HTML with letterhead templates combine HTML email content with an enhanced letterhead, allowing administrators to apply consistent branding elements such as a logo, colors, and footer content. Custom HTML templates are appropriate when HTML formatting is needed without using a Salesforce letterhead, including when an organization supplies or maintains its own HTML markup. Visualforce email templates are developer-created templates that use Visualforce markup and can support more advanced layouts, conditional rendering, custom components, and complex data presentation.

These formats are the established Salesforce Classic email-template types and remain relevant where classic templates are available. Administrators should select the format based on the desired level of formatting, branding consistency, and customization. Salesforce also offers Lightning email templates for composing reusable email content in Lightning Experience, but that is a separate template experience from the classic template types named here. See Salesforce Trailhead's Email Templates in Lightning Experience module and Salesforce's Visualforce Email Templates documentation for implementation details.

QUESTION NO: 76

A sales manager at Cloud Kicks would like a dashboard to emphasize some important data and tell a more compelling data story to the sales reps. How should a Platform Administrator achieve this for the sales manager?

A. Use a Text Widget.

B. Assign a new Task to each rep.

C. Use the Highlights Panel.

D. Send out a mass email.

ANSWER: A

Explanation:

Use a Text Widget. Salesforce Lightning dashboards support text widgets that administrators can place directly on the dashboard to provide context around the displayed metrics. A text widget can contain a title, explanatory narrative, guidance for interpreting results, a callout of a priority goal, or a concise description of the business action expected from sales reps. This lets the manager connect otherwise separate charts and metrics into a coherent story rather than asking users to infer the significance of the data on their own.

For example, the administrator can add text that identifies an important pipeline trend, states the team's target, explains the reporting period, and directs reps to focus on a specific action. The widget can also use rich text formatting and links where appropriate, helping draw attention to the most meaningful information while keeping that guidance available whenever users open the dashboard. This is especially useful when a dashboard is shared broadly because all viewers receive the same business context alongside the live report data. Salesforce's dashboard guidance describes text as a supported dashboard component for adding contextual information, and Trailhead covers using dashboard components to communicate insights effectively. See Salesforce Help: Dashboard Components and Trailhead: Create Dashboards.

QUESTION NO: 77

Which of the following are enhancements included in the Spring 11 release?

A. All profiles get access to the report builder by default.

B. The old report wizard is totally phased out.

C. Group and Professional Edition organizations can use report builder.

D. You get scatter charts, a new chart type for reports.

E. Chatter feed posts now has a "like" option.

ANSWER: A C D

Explanation:

The Spring ’11 reporting enhancements expanded both the availability and capabilities of the new Report Builder. “All profiles get access to the report builder by default” is correct because Salesforce made the Report Builder available by default, while administrators could still control a user’s ability to create and manage reports through the applicable report permissions. “Group and Professional Edition organizations can use report builder” is also correct: this release broadened Report Builder availability to these editions, giving more organizations access to the newer report-creation experience. “You get scatter charts, a new chart type for reports” is correct as well. Scatter charts were introduced as a reporting visualization option, allowing report data to be plotted as paired numeric values and making it easier to identify relationships, clusters, and outliers. These changes reflect the release’s focus on improving report authoring and charting rather than requiring organizations to remain on the older reporting experience. Salesforce’s release-note documentation is the authoritative record for functionality delivered in a specific seasonal release; see the Salesforce Release Notes. For current background on creating and visualizing report data, see Salesforce Reports Overview.

QUESTION NO: 78

The administrator for AW Computing is working with a user who is having trouble togging in to Salesforce.

What should the administrator do to identify why the user Is unable to log in?

A. Review the login history for the user.

B. Check the attempted logins by running the setup audit trail.

C. Pull the password history to ensure the password policy was followed.

D. Reset the security token for the profile.

ANSWER: A

Explanation:

Review the login history for the user. Salesforce Login History is the appropriate troubleshooting record because it captures both successful and failed login attempts and provides details that help an administrator determine the cause of access issues. Relevant fields include the login time, source IP address, browser or client type, login status, and an API type where applicable. The status information can identify conditions such as an invalid password, an attempt outside configured login hours, an IP restriction, or another authentication-related failure. An administrator can access this information from Setup by searching for *Login History*, then filter or download the records to investigate the affected user’s attempts. This lets the administrator diagnose the issue from the actual login event before making changes to the user account, password, profile, or security settings. Salesforce documents Login History as the place to monitor and investigate user login activity: Monitor Your Salesforce Org. For additional guidance on user access and login troubleshooting, see Manage Users.

QUESTION NO: 79

Which of the following statements about a user record are true?

A. Each has its own unique username.

B. Each has its own username which is not necessarily unique.

C. Both active and inactive users use license.

D. Each user must be associated with a profile.

E. Some users are not associated with any Role.

ANSWER: A D E

Explanation:

Each Salesforce user record has a unique username. Salesforce requires usernames to be unique across all Salesforce orgs, not merely within one org. A username is formatted like an email address, although it does not have to correspond to a functioning email inbox. This global uniqueness ensures that a person's login identifier can be unambiguously recognized by Salesforce.

Each user must also be assigned a profile. The profile is a required part of a user record because it establishes the user's baseline permissions and access settings, including object permissions, field-level security, user permissions, login hours, and IP restrictions where configured. Administrators select the appropriate profile when creating a user and can change it later if the user's responsibilities change.

Some users are not associated with any role. Roles are optional and primarily support record-level access through the role hierarchy, such as extending access upward to managers. A user can have a profile and fully use Salesforce without being assigned a role, particularly where the organization does not need that user represented in its role hierarchy. See Salesforce Help: Users and Profiles and Salesforce Help: Roles.

QUESTION NO: 80

Which tool should an administrator use to identify and fix potential session vulnerabilities?

A. Field History Tracking

B. Setup Audit Trail

C. Security Health Check

D. Organization-Wide Defaults

ANSWER: C

Explanation:

Security Health Check is the appropriate tool because it evaluates an organization's security settings against Salesforce's recommended baseline or a custom baseline and identifies settings that may expose the org to risk. Its assessment includes session-related controls, such as session timeout, IP restrictions, and other session security settings. The results show a compliance score and categorize settings by risk, enabling an administrator to review the recommendation and, where appropriate, update a setting directly from the Health Check interface. This makes it well suited to proactively identifying and remediating potential vulnerabilities affecting how users authenticate, maintain sessions, and access the organization. Administrators should review recommendations in the context of their organization's security requirements, user workflows, and any applicable compliance obligations before applying changes. Salesforce also supports using Health Check repeatedly to monitor the security posture as configuration and business needs evolve. See Salesforce's Security Health Check documentation and the Trailhead Security Health Check module for details on assessing and improving security settings.

QUESTION NO: 81

I can access a "list view" of records by clicking on the leads, opportunities, or accounts tabs. I can also filter my list views so I can see exactly what I need.

A. True

B. False

ANSWER: A

Explanation:

True is correct. Salesforce list views provide a way to display and work with a selected set of records for an object, such as Leads, Opportunities, or Accounts. When a user opens one of these object tabs, Salesforce displays the object's records through a list-view interface, where the user can select an available list view from the list-view controls. Standard views may include sets such as recently viewed records or records owned by the current user, while authorized users can also create custom list views that use defined filter criteria.

List-view filtering helps users narrow the records shown to the information relevant to their work. Users can apply filters based on record fields and, where available, use filter logic to refine how multiple criteria are evaluated. They can also control visible columns and sort records, allowing the list to function as a focused working view rather than a complete, unfiltered record set. Access to particular list views and records continues to respect Salesforce sharing, permissions, and the user's object access. Salesforce documents list-view creation, filtering, and management in its List Views help documentation and covers their practical use in the Salesforce Trailhead list views module.

QUESTION NO: 82

An administrator at DreamHouse Realty needs to create customized pages for the Salesforce mobile app. Which two types of pages should a Platform Administrator build and customize using the Lightning App Builder?

A. App page

B. User page

C. Record page

D. Dashboard page

ANSWER: A C

Explanation:

App page and **Record page** are the Lightning App Builder page types used to tailor the Salesforce mobile experience. An app page is a customizable landing page for a Lightning app. An administrator can assemble standard and custom Lightning components, such as lists, reports, charts, and flows, into a focused workspace, then make the page available through the app's navigation so mobile users can access it easily. A record page controls the component-based experience when users open records for a particular object. It can present relevant fields, related information, actions, and custom components in an organized mobile-friendly layout. Record pages can also use component visibility rules to display information only when specified conditions are met, helping provide a contextual experience for different users or record scenarios. Salesforce's Lightning App Builder is the declarative tool for creating and activating both page types, including assignments by app, record type, profile, or form factor where supported. See Salesforce Trailhead's Customize Your Salesforce Org with the Lightning App Builder and the Salesforce Help topic on Lightning App Builder.

QUESTION NO: 83

Every profile, including profiles associated with Customer Portal users must have at least one visible app.

A. True

B. False

ANSWER: B

Explanation:

False is correct. A profile is a collection of user permissions and settings, and app visibility is configured independently from the existence of the profile itself. An administrator can control which apps are available to users through profile and permission-set app settings, but Salesforce does not impose a universal requirement that every profile expose at least one app. This distinction is especially relevant to the legacy Customer Portal model: portal users access the portal's tailored external-user experience rather than needing a standard Salesforce application to be visible in the App Launcher or app menu. Their profile still governs appropriate object, field, record, and system permissions for that external access, even if no Salesforce app is made visible. In current Salesforce implementations, Customer Portal has been superseded by Experience Cloud, but the underlying administration principle remains the same: external-user access is determined by licensing, profile or permission-set permissions, sharing, and the configured digital experience—not by a mandatory visible app. Salesforce's profile documentation describes profiles as defining user settings and permissions, while app access can be assigned separately. See Salesforce Help: Profiles and Salesforce Help: Experience Cloud Overview.

QUESTION NO: 84

An Administrator at Ursa Major Solar (UMS) needs to create a new user.

When creating a username, which two considerations need to be taken in to account? (Choose two.)

A. Username is added to the Active User Log.

B. Username must be unique across all Salesforce orgs.

C. Username needs to be in the format of an Email Address.

D. Username matches to the User's Email address.

ANSWER: B C

Explanation:

A Salesforce username must be unique across all Salesforce organizations, not merely within the Ursa Major Solar org. Salesforce uses the username as a global identifier for authentication, so an administrator must select a value that has not already been assigned to a user in another production, sandbox, Developer Edition, or Trailhead-related Salesforce environment. This global uniqueness requirement can make a username that appears available internally unavailable when the user record is saved.

A username also must use an email-address format, meaning it contains an @ symbol and a domain-like portion, such as `user@example.com`. The format is required even where the username is being used primarily as a login identifier. Administrators can therefore construct a unique username in email format to meet both requirements. Salesforce's user-management guidance describes usernames as unique across Salesforce organizations and requires the email-format convention. See Salesforce User Fields documentation and Trailhead: Create Users.

QUESTION NO: 85

Which of the following Collaboration Cloud Enhancements Features are automatically visible to all users after Winter 11 and no setup is required?

A. Free Chatter Users

B. Chatter Search

C. Chatter Invitations

D. Files Tab

E. Using Chatter Filters

F. View Chatter Feeds

ANSWER: B D E

Explanation:

In the Winter '11 Collaboration Cloud enhancements, **Chatter Search**, the **Files Tab**, and **Using Chatter Filters** were delivered as user-facing Chatter improvements that became available without an administrator having to perform separate feature configuration. Chatter Search gave users a direct way to find relevant Chatter content, supporting easier discovery of conversations and collaboration activity. The Files Tab provided a dedicated location for working with files shared through Chatter, making file collaboration more accessible from the standard user experience. Chatter filters let users narrow the content displayed in a feed, helping them focus on updates most relevant to their work. These enhancements were intended to improve usability immediately after the release, rather than requiring an organization to provision a special user type, configure invitations, or complete additional setup before users could see them. Salesforce's Chatter documentation describes the platform's search, feed, and file-collaboration capabilities in more current terminology; the Winter '11 release introduced early versions of these experiences. See Salesforce Help on searching Chatter and working with Salesforce Files.

QUESTION NO: 86

Cloud Kicks has a Customer success agent going on leave and needs to change ownership on multiple

cases.

Which two users are able to fulfill this request?

Choose 2 answers

A. A user with Read Permission on account.

B. A user with manager role above the agent.

C. A user with the System Administrator profile.

D. A user with the Manage Cases Permission

ANSWER: C D

Explanation:

A user with the System Administrator profile can fulfill this request because administrators have broad access to Salesforce records and the administrative permissions needed to manage case ownership, including transferring records in bulk. This enables the administrator to reassign the departing agent’s open or applicable cases efficiently through Salesforce’s mass-transfer functionality, rather than changing each case one at a time.

A user with the Manage Cases Permission can also fulfill the request. The Manage Cases permission grants the elevated case-management capability needed to work with cases beyond ordinary record-level access, including transferring cases to another owner when operational coverage changes. This is appropriate for service leaders or designated support operations users who need to redistribute case workloads without being given full system-administration access.

Salesforce supports mass transfer as an administrative tool for reassigning records, and access to these tools depends on the user’s permissions. Granting the relevant case-management permission follows the principle of least privilege: users can perform necessary support operations while retaining only the level of access required for their responsibilities. See Salesforce’s Mass Transfer Records documentation and the Salesforce system permissions reference.

QUESTION NO: 87

The following can be done by a System Admin to a standard field.

A. Change the field label

B. Add help text

C. Add/edit values of a picklist

D. Delete the field

E. All of the above

F. None of the above

ANSWER: A B C

Explanation:

A system administrator can customize many attributes of standard fields without changing their underlying Salesforce-defined purpose. **Change the field label** is supported for standard fields where Salesforce permits label customization; changing the label updates the text users see while retaining the field’s API name and standard behavior. **Add help text** is also available through the field’s settings. Help text provides contextual guidance to users and can be displayed when they hover over the field’s information icon, helping improve data quality and user adoption.

Add/edit values of a picklist is supported when the standard field is a customizable picklist. Administrators manage those available values from the field configuration and can control which values are available for record types as needed. These actions are examples of declarative configuration: they tailor the user experience and permitted data values while preserving the standard field itself. Salesforce documents that administrators can modify field labels and help text in field settings, and manage picklist values for fields that use picklists. See Customize Standard Object Fields and Customize Picklists.

QUESTION NO: 88

An administrator needs to create a report that shows all Project records, including Projects that do not have related Milestone records.

Which two configurations should the administrator use when creating the custom report type?

Choose 2 answers

A. Define Project as the primary object.

B. Select the relationship option where each Project record may or may not have related Milestone records.

C. Create a summary formula on the Milestone object.

D. Make the Milestone lookup field required.

ANSWER: A B

Explanation:

Define Project as the primary object. and **Select the relationship option where each Project record may or may not have related Milestone records.** are correct. A custom report type defines the objects and relationships that are available to reports built from it. Selecting Project as the primary object makes Projects the basis of the report results.

Choosing the relationship option that allows a Project to have or not have related Milestones ensures that Projects without Milestone records remain in the report. If the report type required a related Milestone, Projects without one would be excluded. See Salesforce Help: Custom Report Types.

QUESTION NO: 89

Workflow rules can be triggered any time a record is saved or created, depending on your rule criteria:

A. True

B. False

ANSWER: A

Explanation:

True is correct. A workflow rule evaluates records when they are created or edited (saved), provided that the rule is active and the record meets its defined criteria under the selected evaluation behavior. Salesforce provides evaluation choices that determine whether the rule runs only when a record is created, when it is created and later edited so that it first meets the criteria, or whenever it is created or edited and continues to meet the criteria. Consequently, the rule criteria and evaluation setting together control whether a particular create or save operation triggers the workflow rule's actions.

For example, an administrator can define criteria that identify records needing follow-up and configure the rule to evaluate every time a record is created or edited. When a qualifying save occurs, Salesforce can execute the configured immediate workflow actions and, where applicable, schedule time-dependent actions. This behavior is why workflow rules have historically been used to automate actions in response to record saves. Although Salesforce recommends building new record-triggered automation with Flow, existing active workflow rules still follow their configured criteria and evaluation behavior. See Salesforce's Workflow Rules documentation and workflow evaluation criteria guidance.

QUESTION NO: 90

When a cloud kicks Opportunity closes, the company would like to automatically create a renewal

opportunity.

Which two automation tools should an administrator use to accomplish this request?

Choose 2 answers

A. Approval Process

B. Flow Builder

C. WorkFlow Rule

D. Process Builder

ANSWER: B

Explanation:

Flow Builder is the appropriate automation tool because an administrator can build a record-triggered flow on the Opportunity object that runs when an Opportunity is updated to a closed stage, such as Closed Won. The flow can evaluate the relevant entry criteria and use a Create Records element to generate a new Opportunity for the renewal. Administrators can populate the renewal's account, owner, close date, amount, stage, and any necessary values from the closed Opportunity, while also setting fields that distinguish it as a renewal. This approach supports more sophisticated logic when needed, including decisions, formulas, related-record lookups, scheduled paths, and safeguards to prevent duplicate renewal creation. Salesforce identifies Flow Builder as its primary declarative automation solution and recommends moving process automation to flows. A before-save or after-save design should be selected based on the needed actions; because creating a separate Opportunity record is required, an after-save record-triggered flow is generally suitable. See Salesforce's Flow Builder documentation and its Create Records element reference.

QUESTION NO: 91

AW Computing (AWC) occasionally works with independent contractors, who the company

stores as Contacts in Salesforce. Contractors often change agencies, and AWC wants to maintain the

historical accuracy of the record.

What should AWC use to track Contacts?

A. Use a partner community to track the Contacts.

B. Create a new Contact record for each agency.

C. Create a Junction object to track many-to-many relationship.

D. Enable Contacts to multiple Accounts.

ANSWER: D

Explanation:

Enable Contacts to multiple Accounts is correct because it lets AWC retain one Contact record for each individual contractor while associating that person with more than one agency Account. Salesforce creates Account Contact Relationship records for the additional relationships, rather than requiring duplicate Contact records for the same person. This preserves the contractor's identity, contact details, activities, and other person-level history in a single Contact record.

For the agency that currently represents the contractor, AWC can maintain the appropriate Account relationship. When the contractor moves to a different agency, an administrator or authorized user can add a relationship to the new Account and update the prior relationship as appropriate. The relationship record can also store details specific to that agency association, such as a role, direct or indirect status, and start and end dates where enabled and applicable. This design supports accurate historical reporting because the contractor does not need to be recreated merely because their agency affiliation changes.

Salesforce documents this capability as Contacts to Multiple Accounts and explains that it is intended for people who have relationships with multiple organizations. See Salesforce Help: Contacts to Multiple Accounts and Trailhead: Account and Contact Relationships.

QUESTION NO: 92

FILL BLANK

List the differences between the Jumpstart Wizard and the Standard Approval Process Wizard:

A. See the answer below

B. The Jump Start Wizard creates a simple, single-step approval process with an approver determined from a user lookup field. The Standard Approval Process Wizard supports multiple steps, criteria-based routing, and configurable approval actions.

ANSWER: B

Explanation:

The Jump Start Wizard is designed to create a simple approval process quickly. It supports one approval step and automatically determines the approver from a user lookup field on the record, such as a manager or another designated user. This approach is appropriate when every submitted record follows the same straightforward route to a single approver. The Standard Approval Process Wizard provides the flexibility needed for more complex business processes. An administrator can define multiple approval steps, use criteria to control when each step applies, and specify approvers through several supported methods, including related users, queues, or manually selected approvers. It also supports configuring approval actions at important points in the process, such as initial submission, final approval, final rejection, and recall. These capabilities let an organization model sequential or conditional approval requirements while automatically updating records, sending notifications, or performing other workflow actions. Salesforce recommends choosing the wizard based on the required process complexity: use the Jump Start Wizard for a basic single-step approval flow and the Standard Approval Process Wizard when multiple steps, criteria, or customizable actions are required. See Salesforce Trailhead's Configure Approval Processes and Approval Processes Overview.

QUESTION NO: 93

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

A. Weekly Data Export

B. Data Loader

C. Data Import Wizard

D. Mass Delete Records

ANSWER: B D

Explanation:

Data Loader and **Mass Delete Records** can delete records that were created accidentally during an import. Data Loader is appropriate when the mistaken import is large or when the administrator needs precise control over the records being removed. The administrator can use the record IDs from the import's success file, then run Data Loader's Delete operation to remove exactly those records. This approach also supports bulk processing and produces result files that document successful and failed deletions.

Mass Delete Records, available from Setup, is useful for administrators who need a browser-based way to find and delete a smaller or easily filtered set of imported records. The administrator selects the relevant object, specifies filter criteria to identify the unintended records, reviews the matching results, and confirms deletion. Deleted records are generally sent to the Recycle Bin, subject to Salesforce retention and recycle-bin limits, providing a limited recovery window if needed. Salesforce documents Data Loader's deletion capability in its Data Loader guide and describes the Setup-based deletion tools in Delete Records.

QUESTION NO: 94

A record owner has the privileges to: View and edit records, transfer or change ownership of records, and delete owned records.

A. True. All the time.

B. False. All the time.

C. True. If Object permission is enabled.

D. False. If Object permission is disabled.

E. True. If Object permission is disabled.

F. False. If Object permission is enabled.

ANSWER: C D

Explanation:

"True. If Object permission is enabled." and "False. If Object permission is disabled." are correct because record ownership does not independently grant unrestricted access to a record. Ownership is one component of Salesforce's record-access model, while object permissions establish the baseline actions a user can take on records of that object. A user must have the applicable object-level permissions—such as Read to view, Edit to modify, Delete to delete, and Transfer where applicable—to perform the stated actions on an owned record. Salesforce then applies record-level access, including ownership, role hierarchy, sharing rules, teams, and manual sharing, to determine which individual records are available to that user.

Therefore, ownership can provide record-level access to the owner, but it cannot override missing object permissions. When the relevant object permissions are enabled, the owner can carry out the listed actions on records they own, subject to any feature-specific requirements and administrative restrictions. When those permissions are disabled, owning the record does not permit the corresponding action. This distinction between object-level permissions and record-level access is fundamental to Salesforce security design. See Salesforce's object permissions documentation and record-level access and sharing documentation.

QUESTION NO: 95

Users can be restricted to view a particular field in views, searches and reports by hiding the field at

A. Page Layout

B. Field Level Security

C. User Profile

D. None of the Above

ANSWER: B

Explanation:

Field Level Security is the correct control because it determines whether a user can access an individual field on a record, independent of the page layout used. An administrator can make a field invisible to users by removing field-level read access through a profile or permission set. When a user does not have access to a field, Salesforce prevents that field from being exposed in the user interface and in features that rely on field visibility, including record views, list views, searches, and reports. This is an important data-security control: it protects the field's content rather than merely changing its placement or presentation on a page. Field-level security can also be used to make a field read-only for users who may view, but must not edit, its value. Administrators should configure the appropriate field permissions for the intended users' profiles or permission sets and then verify access with Salesforce's field accessibility tools. Salesforce documents field-level security as the mechanism for controlling users' access to specific fields: Salesforce Help: Control Access to Fields. See also Salesforce Help: Field-Level Security.

QUESTION NO: 96

All existing custom objects that were previously deployed will still be deployed when you upgrade a managed application.

A. True

B. False

ANSWER: A

Explanation:

True is correct. A managed package upgrade is designed to preserve the installed package's existing metadata and subscriber data while applying the publisher's newer package version. In particular, custom objects that were included in an earlier managed-package version remain available in subscriber organizations after an upgrade. This protects the object definitions, their records, and subscriber customizations that may depend on those objects. A package publisher can deliver additions and supported changes in a later version, but an upgrade does not simply remove already deployed managed custom objects from customer organizations. This behavior is essential because custom objects can contain business data and can be referenced by relationships, automation, reports, permissions, and customizations in the subscriber org. Administrators should still review upgrade notes and test upgrades in a sandbox when a new package version changes fields, automation, permissions, or other package functionality. Salesforce's managed-package guidance describes how upgrades update installed package components while maintaining the package relationship and subscriber organization data. See Salesforce Help: Upgrade Packages and Salesforce Developer Guide: Packageable Components.

QUESTION NO: 97

Ursa Major Solar wants to customize Activities (tasks and events). What are three types of customization that occur? (Choose three.)

A. Workflow Rules

B. Field Tracking

C. Assignment Rules

D. Validation Rules

E. Custom Fields

ANSWER: A D E

Explanation:

Workflow Rules, **Validation Rules**, and **Custom Fields** are supported forms of Activity customization. Custom fields let an administrator capture business-specific information on Task and Event records, such as a visit outcome, follow-up category, or meeting format. These fields can then be added to page layouts and used in reporting, list views, and automation where supported.

Validation rules help maintain reliable Activity data by requiring or restricting values when users save Tasks or Events. For example, an organization can require a particular field when a task is marked complete, ensuring that staff record the information needed for operational follow-up.

Workflow rules are a legacy declarative automation capability that can apply to Task records and perform actions based on defined criteria. Although Salesforce recommends using Flow Builder for new automation, workflow rules remain a recognized Activity customization in the context of this question. Together, these features allow administrators to tailor Activity data capture, enforce data quality, and automate process steps. See Salesforce's Activities documentation and custom fields guidance on Trailhead.

QUESTION NO: 98

How many app exchange apps can you install in UE?

A. 10

B. 20

C. 30

D. Unlimited

ANSWER: D

Explanation:

"Unlimited" is the correct answer for this question because UE refers to Unlimited Edition, whose historical edition entitlement for AppExchange app installations was not capped at the fixed quantities associated with lower editions. AppExchange apps are installed in an org as packages, allowing an administrator to add functionality supplied by Salesforce partners or other publishers without building that functionality from scratch. Therefore, in the edition-based limits context tested here, Unlimited Edition permits an unlimited number of AppExchange applications.

This entitlement should be understood as an edition feature rather than a guarantee that every package can coexist without constraints. An administrator must still review package requirements, required permissions, dependencies, security considerations, license terms, and the organization's applicable platform limits before installing an app. Salesforce's AppExchange documentation describes the process of finding and installing apps and packages, while Salesforce's limits documentation explains that organizations remain subject to applicable limits and allocations. See Salesforce Help: Install a Package or App from AppExchange and Salesforce Help: Salesforce Platform Limits.

QUESTION NO: 99

You can map a custom lead field to only one of the following objects at a single instance? (Choose all that apply.)

A. Account

B. Contacts

C. Cases

D. Opportunities

ANSWER: A B D

Explanation:

During lead conversion, Salesforce allows an administrator to define lead custom-field mappings so that data captured on a lead is retained on a record created or matched during conversion. A custom lead field can be mapped to a custom field on an Account, a Contact, or an Opportunity. These are the supported destination record types for lead custom-field mapping, allowing the organization to carry lead qualification or business data into the appropriate post-conversion records.

The mapping is configured from the lead object's field settings, using the Map Lead Fields function. For each lead custom field, the administrator selects the destination custom field for the applicable conversion object. This is especially useful when the same business concept needs to remain available after conversion, such as an industry-specific classification on the Account, a preference on the Contact, or a projected value attribute on the Opportunity. Salesforce documents lead-field mapping as supporting Account, Contact, and Opportunity fields. See [Salesforce Help: Map Custom Lead Fields]() and [Trailhead: Customize Fields]().

QUESTION NO: 100

A company needs its customer service agents to collect and display different information on Case records based on whether customers are calling in with a question, product suggestion, or complaint.

Which three features should the System Administrator use to meet this goal? (Choose three.)

A. Field level security

B. Page layouts

C. Permission sets

D. Record types

E. Support processes

ANSWER: B D E

Explanation:

Page layouts, **Record types**, and **Support processes** work together to tailor the Case experience to the reason a customer contacts support. Record types can represent the distinct Case categories, such as questions, product suggestions, and complaints. Each record type can be assigned an appropriate page layout, allowing agents to see and complete the fields that are relevant to that type of interaction. For example, a complaint layout can present fields needed to document the issue and resolution details, while a product-suggestion layout can focus on the requested enhancement and product area.

Support processes are designed specifically for Cases and define the available values for the Case Status field. A support process can be associated with each Case record type, so each category can use a status lifecycle appropriate to its handling process. Combining record types with their assigned page layouts and support processes lets the administrator control both the information agents collect and display and the status values used as the Case progresses. Salesforce documents that Case record types are used with page layouts and support processes to provide different business processes and user experiences for Cases. See Salesforce Record Types documentation and Salesforce Support Processes documentation.

QUESTION NO: 101

Which of the following cannot be on the controlling side of the Dependent Picklist?

A. Checkbox

B. Custom Picklist

C. Standard Picklist

D. Multi Select Picklist

ANSWER: D

Explanation:

Multi Select Picklist cannot be used as the controlling field in a Salesforce field dependency. A controlling field must provide one discrete value that Salesforce can use to determine which values are available in the dependent picklist. A multi-select picklist permits users to choose more than one value simultaneously, so it cannot supply the single controlling value required to evaluate and apply a dependency mapping. Salesforce supports a checkbox or a standard or custom single-select picklist as a controlling field. When configuring the dependency, an administrator maps each available controlling value to the permitted values in the dependent picklist; this helps guide users toward valid, relevant selections and improves data quality.

The dependent field itself can be a standard or custom picklist, including a multi-select picklist, but the field that drives its available values must be a supported controlling-field type. See Salesforce's [field dependency documentation]() and the [Trailhead module on dependent picklists]().

QUESTION NO: 102

API's are not available for use in which Salesforce.com edition?

A. Developer Edition

B. Professional edition

C. Enterprise Edition

D. Unlimited edition

ANSWER: B

Explanation:

Professional edition is the correct answer in the traditional Salesforce Administration Essentials exam context because standard API access is not included as a native entitlement for that edition. Salesforce APIs enable external applications and integration tools to read, create, update, delete, and query Salesforce data programmatically. Administrators commonly rely on API access for integrations, data-loading tools, middleware, and custom applications that connect to the organization.

Salesforce's core API documentation describes the APIs as programmatic interfaces for accessing Salesforce data and functionality, subject to the organization's edition, licenses, and enabled features. In Professional Edition, API access has historically required a separately purchased API access add-on rather than being available by default. Therefore, when the question asks which listed edition does not make APIs available for use as a standard edition capability, Professional edition is the intended answer. Before planning an integration in a real organization, an administrator should confirm the current contract, enabled permissions, and edition-specific feature availability, because Salesforce licensing and add-on availability can change over time. See the [Salesforce API overview]() and Salesforce's [edition and pricing information]().

QUESTION NO: 103

Ursa Major is onboarding 15 new employees in three weeks.

The Administrator needs to create user records in Salesforce without activating them.

Which two methods allow the Administrator to achieve this goal? (Choose two.)

A. Click Add Multiple Users and ensure that Generate New Password and Notify User Immediately are unchecked.

B. Create them with the User Import Wizard and ensure that Active is unchecked.

C. Schedule a Time-Dependent Workflow to create users in three weeks.

D. Create a .csv file ensuring that IsActive = False, and use the data loader to insert.

ANSWER: A D

Explanation:

"Click Add Multiple Users and ensure that Generate New Password and Notify User Immediately are unchecked" supports advance provisioning by creating the user records without sending the initial password notification. The administrator can complete the setup ahead of the employees' start date and then reset passwords or otherwise communicate access when onboarding begins. This is useful for a relatively small group because the Add Multiple Users page supports entering several users directly in Setup.

"Create a .csv file ensuring that IsActive = False, and use the data loader to insert." is also an appropriate bulk-provisioning method. The User object's `IsActive` field controls whether a user can log in. Setting it to `False` creates inactive user records, allowing the administrator to prepare required attributes such as usernames, profiles, roles, licenses, and contact information before enabling access. Data Loader is particularly suitable when records must be loaded from a prepared spreadsheet or when the administrator needs to create a larger set of users efficiently.

Salesforce describes creating and managing users, including password handling, in its Add Users documentation. For bulk record operations, see the Salesforce Data Loader Developer Guide.

QUESTION NO: 104

When working on opportunities, sales representatives at Universal Containers need to understand how their peers have successfully managed other opportunities with comparable products, competing against the same competitors.

Which two features should an administrator use to facilitate this? (Choose two.)

A. Big deal alerts

B. Opportunity update reminders

C. Chatter groups

D. Opportunity Dashboard

ANSWER: C D

Explanation:

Chatter groups provide a focused collaboration space where sales representatives can discuss competitive situations, share successful sales approaches, post relevant files, and ask colleagues for practical guidance. An administrator can create groups organized around products, competitors, regions, or sales initiatives, allowing knowledge from completed and active opportunities to be shared with the right peers. Salesforce describes Chatter groups as places for users to collaborate around common interests, projects, and business topics.

An **Opportunity Dashboard** gives representatives a visual, data-driven way to identify and evaluate comparable opportunities. Dashboard components can summarize opportunity pipeline, wins, losses, amounts, stages, products, and other reportable information. By using underlying opportunity reports filtered or grouped by product and competitor fields, users can spot patterns in successful deals and investigate the records and strategies associated with them. Together, collaboration in Chatter groups and analysis through an Opportunity Dashboard support both peer knowledge sharing and evidence-based insight into similar selling situations.

See Salesforce guidance on Chatter groups and dashboards.

QUESTION NO: 105

What is true about look up relationships?

A. Object in look up relationship can link to self

B. Child in lookup gets deleted if parent gets deleted

C. The child object in lookup is a related list for the parent

D. The lookup is required always

ANSWER: A C

Explanation:

“Object in look up relationship can link to self” is correct because Salesforce supports self-relationships, which are lookup relationships from an object back to the same object. This is useful when records form a hierarchy or have a peer-to-peer association. For example, an Account can include a lookup to another Account to identify a parent account, and a custom object can use a lookup field to associate one record with another record of that same custom object. Salesforce describes self-relationships as a special type of lookup relationship.

“The child object in lookup is a related list for the parent” is also correct in the context of the parent record page. When a lookup field on one object references a record on another object, the referencing records can be displayed in a related list on the referenced record’s page layout. This gives users a convenient view of records associated through that lookup, such as contacts associated with an account or custom child records associated with a parent record. Administrators can configure the relevant related list on the parent object’s page layout. See Salesforce’s Object Relationships Overview and Self Relationships.

QUESTION NO: 106

What are three characteristics of a master-detail relationship?

A. Each object can have up to five master-detail relationships.

B. Permissions for the detail record are set independently of the master.

C. Roll-up summaries are supported in master-detail relationships.

D. The master object can be a standard or custom object.

E. Detail records do not have an owner field; ownership is inherited from the master record.

ANSWER: C D E

Explanation:

Roll-up summaries are supported in master-detail relationships because Salesforce can aggregate values from related detail records and display calculations such as COUNT, SUM, MIN, or MAX on the master record. This makes the relationship especially useful where a parent record needs to maintain totals or other summaries of its children. The master object can be either a standard object or a custom object, while the detail object can be custom. Salesforce supports master-detail relationships between a custom detail object and an eligible standard or custom master object. Detail records do not have their own Owner field; instead, ownership and record access are derived from the associated master record. This inheritance means that access to a detail record follows the master record’s sharing and security model, maintaining a parent-controlled relationship. These are core characteristics of the master-detail model and distinguish it from a lookup relationship. See Salesforce’s relationship considerations documentation and the Salesforce Trailhead object relationships module for more detail.

QUESTION NO: 107

Based on existing Master-Detail and Lookup relationships between objects, Sys Admins can create Custom Report Types to:

A. Choose which standard and custom objects to display

B. Select which fields can be used as columns

C. Define both inner and outer joins

ANSWER: A B C

Explanation:

Custom Report Types let an administrator define the reporting data model by choosing the primary object and the related standard and custom objects that should be available together in reports. This controls the scope of records a report can return and makes the selected objects available to report builders. Administrators can also customize the report type layout, which determines the fields exposed as selectable report columns. The layout can include fields from the objects in the report type’s defined relationship path, allowing users to build reports without needing to understand the underlying object structure.

For supported Lookup and Master-Detail relationship paths, a Custom Report Type can also specify whether reports include only primary-object records that have related records, or include primary-object records with or without related records. In reporting terms, these settings provide inner-join-style and outer-join-style behavior. For example, an administrator can support reporting on parent records with related child records only, or on all parent records regardless of whether related children exist. Salesforce documents that custom report types define the objects, relationships, and fields available for reporting: [Define Custom Report Types] and [Edit Custom Report Type Layouts].

QUESTION NO: 108

Standard Fiscal Years are periods that follow Gregorian calendar, but can start on the first day of any month of the year.

A. True

B. False

ANSWER: A

Explanation:

True is correct. In Salesforce, a standard fiscal year uses a conventional twelve-month calendar structure based on Gregorian calendar months. Although many organizations align their fiscal year with the calendar year and begin it on January first, Salesforce allows an administrator to select a different starting month for the organization's fiscal year. For example, an organization can define its fiscal year as running from April first through March thirty-first, or from July first through June thirtieth. The fiscal year still consists of regular calendar months and follows the normal Gregorian calendar pattern; only the month in which the annual reporting cycle begins is configurable.

This setting is important because Salesforce uses the fiscal-year definition in date-based reporting, forecasting, quotas, and period-oriented business analysis. An administrator configures the fiscal year from the company information and fiscal-year settings, ensuring that report periods reflect the organization's established accounting and planning calendar. Salesforce documentation distinguishes this standard approach from custom fiscal years, which support more specialized period structures. See Salesforce's [Fiscal Year settings documentation] and the [Company-Wide Org Settings Trailhead module] for configuration context.

QUESTION NO: 109

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

A. Related lookup filters

B. Record type

C. Picklist value sets

D. Fields and relationships

ANSWER: B

Explanation:

Record type is correct because record types control which values from a picklist are available for records in a particular business process or category. An Opportunity can use different record types, such as those representing different sales motions, and each record type can expose a tailored subset of the custom picklist's defined values. This lets Cloud Kicks present only the choices that make sense for the kind of opportunity a user is updating.

An administrator configures these value assignments from the Opportunity object's record type settings. For the applicable record type, the administrator selects the custom picklist and manages the values made available to that record type, as well as the default value where appropriate. The underlying field retains its complete set of defined values, while the record type determines the subset users can select for records of that type. Salesforce documents that record types can make different picklist values available for different users or business processes. See Salesforce's Record Types documentation and the Trailhead record types module.

QUESTION NO: 110

Which of the following statements are true about Data Validation?

A. Validation rules apply to all new and updated records for an object.

B. Validation rules can update fields which are not included in a page layout.

C. Validation rules can reference fields which are not included in a page layout.

D. If an error message is not set, a default message will be prompted instead.

E. All of the above.

F. None of the Above.

ANSWER: A C

Explanation:

Validation rules apply to records when they are created and when existing records are edited. Salesforce evaluates the rule's formula during the save process; when the formula evaluates to true, Salesforce prevents the record from being saved and displays the configured error message. This makes validation rules an effective declarative control for maintaining data quality consistently across the object, regardless of whether the record is being entered through the standard user interface, API-based processes, imports, or other supported save mechanisms.

Validation rules can reference fields that are not included in a page layout. A page layout controls which fields a user sees and can edit in a particular interface, but it does not limit the fields available to a validation-rule formula. Administrators can therefore validate relationships among visible and nonvisible fields, including formula fields and other fields accessible on the object, to enforce business requirements without exposing every referenced field to users. Salesforce's validation-rule documentation describes validation rules as formulas that check entered data and stop the save when criteria are met. See Salesforce Help: Validation Rules and Trailhead: Ensure Data Quality with Validation Rules.

QUESTION NO: 111

The administrator at Northern Trail Outfitters has been using a spreadsheet to track assigned licenses and permission sets.

What feature can be used to track this in Salesforce?

A. Login History

B. Lightning Usage App

C. User Report

D. Permission Set Groups

ANSWER: B

Explanation:

Lightning Usage App is correct because it gives administrators in-app visibility into Salesforce adoption and user access information, eliminating the need to maintain this tracking solely in an external spreadsheet. Its dashboards and reports can help an administrator monitor license assignments and usage, including how many licenses are assigned and available. It also provides access-related insight that supports reviewing permission assignments across the organization. This centralized view is valuable for ongoing administration: it helps identify whether purchased licenses are being used effectively, supports periodic access reviews, and gives the administrator current Salesforce data rather than a manually maintained record that can become outdated. The app is available from Setup and is designed to provide actionable usage and adoption metrics in Lightning Experience. For license management, administrators should use these metrics alongside the organization's license information to understand capacity and assignment trends. Salesforce documents the Lightning Usage App and its available metrics in the Lightning Usage App documentation. Salesforce's administrator learning materials also describe monitoring organizational usage and licenses in the Organization Setup trail.

QUESTION NO: 112

The CTO of AW Computing has defined a new policy for cases to improve customer satisfaction. All cases submitted with a Case Reason of Installation must be acknowledged immediately via email and assigned to the appropriate agents. Any cases that are still in the New status after 4 hours must be escalated to support management.

What case management tools need to be utilized for this requirement?

A. Auto-response rules, Macros, Entitlements

B. Auto-response rules, Queues, Macros

C. Auto-response rules, Queues, Escalation Rules

D. Auto-response rules, Entitlements, Escalation Rules

ANSWER: C

Explanation:

Auto-response rules, Queues, Escalation Rules provides the case-management capabilities described. An auto-response rule can evaluate an incoming case using criteria such as Case Reason = Installation and immediately send an email acknowledgment to the customer. This ensures the customer receives a timely confirmation without requiring an agent to act first. Salesforce queues provide a shared ownership mechanism for cases, allowing Installation cases to be routed to the appropriate support group so that the agents assigned to or working from that queue can take ownership and process them. Finally, an escalation rule can use elapsed time and case criteria to identify cases that remain in the New status for four hours, then escalate them to support management through the configured escalation action. Escalation rules are specifically intended to ensure cases receive attention within defined service timeframes, including reassignment and notification actions. Together, these tools address the immediate acknowledgment, initial operational routing, and time-based management escalation requirements in the policy. Salesforce documents auto-response behavior in its Auto-Response Rules guidance and describes time-based case handling in Escalation Rules.

QUESTION NO: 113

Marketing and Sales users at Universal Containers would like more visibility into Lead and Contact participation in this years Trade Show. How would an Administrator build this into the application? Choose

2 answers

A. Create Cross-object formula fields to display campaign member record details on a lead or a contact record

B. Alert lead and contact owners with workflow when a prospective customer regsiters for the event

C. Customize the campaign member related list on the lead or contact object

D. Create Cross-object formula fields to display lead or contact record details on a campaign member record

ANSWER: C D

Explanation:

Customizing the campaign member related list on the lead or contact object gives Sales users direct access to a person's campaign participation from the Lead or Contact record. Administrators can add the appropriate campaign-history-related information to page layouts so users can see the Trade Show campaign, the member status, and response information in the context of the individual customer or prospect. This makes campaign engagement visible where sales users work.

Creating cross-object formula fields to display lead or contact record details on a campaign member record improves the campaign-management view for Marketing. A Campaign Member connects a campaign to either a Lead or a Contact, and formula fields can surface useful parent-record information on the Campaign Member. When those fields are included in the campaign's member list or reports, marketers can review Trade Show participation alongside relevant Lead or Contact details without repeatedly opening each individual record. Together, these configurations provide visibility from both the person record and the campaign-membership perspective. Salesforce describes campaign members as the records that associate Leads and Contacts with campaigns in its Campaign Members documentation; see also the related list customization guidance.

QUESTION NO: 114

Chatter Desktop is not available in which Salesforce Edition?

A. Free Edition

B. Group

C. Professional

D. Developer

E. Enterprise

F. Contact Manager

ANSWER: F

Explanation:

Contact Manager is the correct answer in the historical product context of this question. Chatter Desktop was a downloadable desktop client that provided notifications and access to Chatter activity outside the browser. Salesforce made that client available for Chatter Free users and for the listed Group, Professional, Enterprise, and Developer environments, but it was not supported in the Contact Manager edition. Therefore, among the editions and license types presented, Contact Manager is the one that did not include Chatter Desktop availability.

This is a legacy Salesforce administration question: Salesforce later retired Chatter Desktop, so an administrator working in a current org should not interpret the question as guidance to deploy or troubleshoot that client today. The exam-style answer instead reflects the availability matrix that applied when Chatter Desktop was an active product. Chatter itself remains a collaboration capability in Salesforce, and current administrators should use Salesforce's current collaboration documentation and release information when evaluating supported features and user access. See Salesforce's Chatter Basics learning module and the Salesforce Help documentation for Chatter for current product guidance.

QUESTION NO: 115

It is possible to share a custom object record manually

A. True

B. False

ANSWER: A

Explanation:

True is correct. Salesforce supports manual sharing of individual custom-object records, enabling a record owner or a user with appropriate sharing authority to grant another user or group access to a specific record. This is useful when access is needed for an exception to the organization's normal role hierarchy, sharing rules, teams, or territory-based access model. Manual sharing lets the user select the recipient and the access level, such as Read Only or Read/Write, subject to the object's configuration and the user's permissions.

For custom objects, manual sharing is available when the object's organization-wide default is sufficiently restrictive, typically Private or Public Read Only. The administrator can also control whether record owners are permitted to manually share records through the object's sharing settings. Users who have privileges such as Modify All on the object can manage sharing regardless of ownership. Manual sharing is therefore a record-level security mechanism: it extends access to a particular record without changing the baseline access model for every record of that object. See Salesforce's Manual Sharing documentation and the Organization-Wide Defaults guidance for the relevant access prerequisites.

QUESTION NO: 116

You cannot change the name of the default Person Account record type, and you cannot create additional record types for Person Accounts

A. True

B. False

ANSWER: A

Explanation:

True is correct. When Person Accounts are enabled, Salesforce creates a standard Person Account record type automatically. This record type is platform-managed because it supports Salesforce's special Person Account data model, which combines account and contact characteristics into a single record for individual consumers. Its name cannot be changed, and Salesforce does not support creating further record types specifically for Person Accounts.

This design ensures that the record type continues to identify Person Account records consistently throughout the organization and in Salesforce features that depend on the Person Account model. Administrators can still configure relevant business processes through other supported tools, such as page layouts, field-level security, validation rules, flows, and assignment-related automation where applicable. However, the Person Account record type itself is a fixed system-provided record type rather than an administrator-defined record type.

For Salesforce's documentation on Person Accounts and their setup and behavior, see Salesforce Help: Person Accounts and Trailhead: Get Started with Accounts and Contacts.

QUESTION NO: 117

A Dashboard is a visual representation of data from multiple reports and (Choose all that apply.)

A. Is comprised of up to 20 components

B. Displays data from standard reports

C. Has a running user to determine what data is visible

D. Displays data as of the last time the dashboard was refreshed

E. Always shows up to date data

F. Can be scheduled to be refreshed and emailed automatically

ANSWER: A C D F

Explanation:

Salesforce dashboards combine visual components, such as charts, gauges, metrics, and tables, to present information from underlying source reports in a single view. A dashboard **is comprised of up to 20 components**, allowing an administrator or report builder to organize several key performance indicators on one dashboard page. A dashboard also **has a running user to determine what data is visible**. The running user's access to records controls the data shown when the dashboard is viewed, unless the dashboard is configured as a dynamic dashboard for supported user-based viewing behavior.

Dashboard component values represent the information available when the dashboard was last refreshed, so it **displays data as of the last time the dashboard was refreshed**. Refreshing reruns the source reports and updates the displayed dashboard values. To keep stakeholders informed without requiring manual refreshes, a dashboard **can be scheduled to be refreshed and emailed automatically**, subject to the organization's scheduling, access, and feature availability. These capabilities make dashboards useful for distributing consistent, periodically updated operational summaries. See Salesforce's dashboard overview and dashboard scheduling documentation.

QUESTION NO: 118

Universal Containers requires a different Lightning page to be displayed when Accounts are

viewed in the Sales Console and in the Service Console.

How should an administrator meet this requirement?

A. Update page layout assignments.

B. Define multiple record types.

C. Assign Lightning pages as app default.

D. Create different user profiles.

ANSWER: C

Explanation:

Assign Lightning pages as app default is correct because Lightning record pages can be activated and assigned based on the Lightning app in which users open the record. The administrator can create or configure separate Account record pages in Lightning App Builder, then activate each page with an app-specific assignment: one for the Sales Console and another for the Service Console. When a user views an Account from the relevant console app, Salesforce uses that app's assigned Lightning page, allowing the organization to present components, tabs, related information, and workspace content tailored to the sales or service workflow.

This configuration is appropriate when the underlying Account records are the same but the required user experience differs by context. For example, the Sales Console page can emphasize opportunities, contacts, and sales activity, while the Service Console page can prioritize cases, entitlements, and support-related components. App default activation is specifically designed to control which Lightning page is used for an object within a particular app. Salesforce documents Lightning page activation and assignment options in Customize Record Pages with the Lightning App Builder and Activate a Lightning Record Page.

QUESTION NO: 119

When are data validation rules executed?

A. A User Saves a Record

B. Before records are imported

C. Using the Data Loader and/or other API tools

ANSWER: A C

Explanation:

Data validation rules are executed when Salesforce attempts to save a record. This includes a user creating or editing a record through the Salesforce user interface, because selecting Save initiates the record-save process. Validation rules evaluate the record's field values against the configured formula criteria; when the criteria evaluate to true, Salesforce displays the specified error message and prevents the save until the data meets the required condition.

Validation rules also apply when records are created or updated through Data Loader and other API-based tools. These tools submit records to Salesforce for insertion or update, and those records go through the applicable save processing. As a result, administrators can use validation rules to enforce the same data-quality requirements regardless of whether data originates from users in the interface or from supported bulk and integration processes. Salesforce documents validation rules as checks that verify data entered by users meets standards before the user can save a record, and its order-of-execution documentation confirms that validation rules are part of record processing. See Salesforce Validation Rules documentation and Salesforce Order of Execution.

QUESTION NO: 120

At Cloud Kicks, sales reps use discounts on the opportunity record to help win sales on particular products. When an opportunity is won, they then have to manually apply the discount to the related opportunity products. The sales manager has asked if there is a way to automate this time-consuming task. What should a Platform Administrator use to deliver this requirement?

A. Approval Process

B. Formula Field

C. Flow Builder

D. Prebuilt Macro

ANSWER: C

Explanation:

Flow Builder is the appropriate declarative automation tool because the requirement involves updating related Opportunity Product records when an Opportunity reaches a specified outcome, such as Closed Won. An administrator can create a record-triggered flow on the Opportunity object that runs when the record is updated and meets the chosen entry criteria. The flow can retrieve the Opportunity Products associated with that Opportunity and update their discount values using the value stored on the parent Opportunity. This removes the manual step from the sales process and ensures that each line item consistently reflects the agreed discount when the deal is won.

Salesforce Flow is designed to automate multi-step business processes, including creating, updating, and working with related records. For this scenario, the flow can be configured to run after the Opportunity is saved, which makes the related records available for update. The administrator should also define entry criteria carefully so the automation runs only when needed and does not unintentionally overwrite line-item discounts during later Opportunity edits. Salesforce's guidance on record-triggered flows and flow elements is available in the Record-Triggered Flows documentation and the Flow Builder Elements reference.

QUESTION NO: 121

What data loss considerations should an administrator keep in mind when changing a custom field type from Text to Picklist?

Choose 2 answers

A. There will be no data loss with use of a global value set.

B. Assignment and escalation rules may be affected.

C. Auto updates will be made to Visualforce references to prevent data loss.

D. Any list view based on the custom field is deleted.

ANSWER: D

Explanation:

Any list view based on the custom field is deleted when the field's data type is changed from Text to Picklist. Salesforce treats a field-type conversion as a structural change that can invalidate saved list-view criteria, because filtering behavior and supported operators can differ between a free-text field and a constrained picklist field. Administrators should therefore identify and document affected list views before making the change, then recreate the required views after the conversion with criteria appropriate for the new picklist values. This is an important data-loss consideration because list views are saved configuration assets that users may rely on for reporting, work queues, and daily record management; their deletion can remove carefully maintained filters and visibility settings even if the underlying records remain available. Salesforce recommends reviewing the implications of changing a custom field's type before saving the change, including impacts to dependent configuration and existing metadata. See Salesforce's guidance on changing custom field types and the Trailhead discussion of custom fields and field types.

QUESTION NO: 122

AW Computing needs to track the manufacturer and model for specific computers and laptops. How can the system administrator ensure that manufacturer selected influences the values available for model.

A. Create a multi-select picklist field that includes both manufacturers and models.

B. Create a lookup field from the manufacturer object to the model object

C. Create a manufacturer field as a controlling picklist and the model as a dependent picklist

D. Create a manufacturer field as the dependent picklist and the model as the controlling picklist.

ANSWER: C

Explanation:

Create a manufacturer field as a controlling picklist and the model as a dependent picklist. Salesforce dependent picklists are designed to filter the available values in one picklist according to the value selected in another field on the same record. Here, the manufacturer field should be configured as the controlling field because the user selects the computer manufacturer first. The model field should then be configured as the dependent field, with each model value mapped only to the manufacturer or manufacturers that produce it. For example, choosing a particular manufacturer can expose that manufacturer's applicable laptop and computer models while keeping the model selection focused and consistent. This configuration improves data quality by guiding users to valid manufacturer-model combinations and avoids requiring them to manually interpret an unfiltered list of every model. An administrator sets up the two picklist fields and then uses the field dependency configuration matrix to define which model values are available for each manufacturer value. Salesforce documents the supported controlling and dependent field relationships and the process for defining value mappings in its field dependencies documentation. Additional administration guidance is available in the Salesforce Trailhead fields module.

QUESTION NO: 123

For custom object records to appear in search results associated tab only needs to exist; the tab does not have to be visible to users.

A. True

B. False

ANSWER: A

Explanation:

True is correct. Salesforce requires a custom object to have a custom tab before records of that object can be returned by Salesforce search. Creating the tab establishes the object's availability to the search infrastructure; the tab does not need to be included in an app's navigation or made visible to a particular user merely for its records to be searchable.

Search results still respect the user's access. In practice, a user must have the appropriate object permissions and record-level access to see a custom object's records in search results. Search also follows normal field-level security behavior when displaying record information. Therefore, hiding a custom-object tab is a useful way to keep an object out of a user's navigation while still allowing users with the necessary permissions to locate its records through search, lookups, reports where applicable, or direct links.

This distinction is important for administrators: tab visibility controls navigation access and presentation, whereas the existence of a custom tab enables search support for the custom object. Review Salesforce's [Search Overview] and the Trailhead module on [custom objects and data modeling] for related configuration concepts.

QUESTION NO: 124

Conditional highlighting can not be used for?

A. Tabular Reports

B. Summary Reports

C. Matrix Reports

D. None of the Above

ANSWER: A

Explanation:

Tabular Reports is correct because conditional highlighting is available only on summary and matrix reports, where Salesforce can evaluate summarized values against defined ranges. An administrator configures up to three color ranges for a numeric summary field, such as record count, summed amount, or an averaged value. The resulting colors draw attention to aggregate performance directly in the report output, helping users identify values that meet, exceed, or fall below a target.

A tabular report presents a simple, ungrouped list of records and does not contain the row or column groupings required for report summaries. Because it has no grouped summary context, it cannot use the conditional-highlighting feature. If the business need is to visually flag individual record-level values, an administrator should consider another supported approach, such as formula fields, report filters, or a grouped report design where summarized metrics are appropriate.

Salesforce's report-format guidance distinguishes tabular reports from summary and matrix reports, while its reporting training identifies conditional highlighting as a capability for summary and matrix report formats. See [Salesforce Trailhead: Report Formats] and [Salesforce Trailhead: Conditional Highlighting].

QUESTION NO: 125

Customer service accesses articles with the Knowledge Lightning component on the Service Cloud Console. Billing department users would like similar functionality on the case record without using the console.

How should the administrator configure this request?

A. Add the knowledge component to the page layout.

B. Add the Knowledge component list to the page layout.

C. Add the Knowledge related list to the page layout.

D. Add the Knowledge component to the Lightning record page.

ANSWER: D

Explanation:

Add the Knowledge component to the Lightning record page. Lightning record pages are configured in the Lightning App Builder and can be assigned by app, record type, and profile, allowing the Billing users to receive the Knowledge experience directly on Case records outside of the Service Console. The Knowledge component gives users contextual access to Salesforce Knowledge articles while viewing a record. Depending on their permissions and the component's supported actions, users can search for relevant published articles, review article content, and associate articles with the case. This meets the requirement because the functionality is delivered through the Case record's Lightning page rather than requiring the console navigation app.

The administrator should open the Case record page in Lightning App Builder, place the Knowledge component in an appropriate page region, save the change, and activate the page or set the needed app/profile assignments. Users must also have the appropriate Salesforce Knowledge access, such as permission to read published articles. Salesforce documents how Lightning record pages are built and activated in Customize Lightning Record Pages and describes Knowledge setup and user access in Salesforce Knowledge Administration.

QUESTION NO: 126

Ursa Major Solar recently enabled the multiple currencies feature.

As a result, which currency will be used as the foundation for all currency conversion rates?

A. Record currency

B. Corporate currency

C. Active currency

D. Personal currency

ANSWER: B

Explanation:

Corporate currency is the foundation for all currency conversion rates in an organization that uses multiple currencies. Salesforce designates one currency as the organization's corporate currency, and administrators define each active currency's conversion rate in relation to that corporate currency. For example, if the corporate currency is USD, the rate for EUR expresses the value of one euro relative to USD. This shared baseline lets Salesforce consistently convert currency values for reporting, forecasting, and other organization-wide calculations, even when individual records are entered in different currencies.

The corporate currency is an organization-level setting rather than a value chosen independently on each record or by each user. Users can have personal currency preferences, and records can use an assigned record currency, but Salesforce relies on the corporate currency as the common reference point when it needs to compare or aggregate amounts across currencies. Administrators manage the corporate currency and the active currency conversion rates from Company Information and Currency Setup. See Salesforce's Manage Currencies documentation and the Manage Currencies Trailhead unit for details.

QUESTION NO: 127

A Salesforce Administrator is creating a new user.

What should the Administrator consider when selecting the Username?

A. It must be alphanumeric and be unique across all Salesforce organizations.

B. It must be alphanumeric and unique to the organization.

C. It must look like an email address and be unique across all Salesforce organizations.

D. It must look like an email address and be unique to the organization.

ANSWER: C

Explanation:

The username must look like an email address and be unique across all Salesforce organizations. Salesforce uses the username as a globally unique identifier for login, so the same username cannot be assigned to users in different production, Developer, sandbox, or other Salesforce organizations. Although its format must resemble an email address—for example, `alex@example.com`—it does not have to be the user's actual, deliverable email inbox. The user's Email field is separate and is the address Salesforce uses for communications such as password resets and system notifications.

When a common username is already in use elsewhere, an administrator can retain an email-like format while making it globally distinct, such as by adding the company name, a unique suffix, or a sandbox identifier. This distinction is especially useful when creating sandbox users, because sandbox usernames are often modified to remain unique while corresponding to production users. Administrators should select a username that meets both the email-style syntax requirement and Salesforce's cross-org uniqueness requirement. See Salesforce's Add Users documentation and the User Fields reference for username requirements.

QUESTION NO: 128

Campaign Member can be associated with which two objects? (Choose two.)

A. Contact

B. Lead

C. Opportunity

D. Account

ANSWER: A B

Explanation:

Campaign members are the individual people who are included in, targeted by, or respond to a Salesforce campaign. Salesforce supports associating campaign-member records with both **Contact** and **Lead** records. This lets an administrator and marketing team maintain campaign participation and engagement history regardless of whether a person is already known as a customer-related contact or is still being qualified as a prospective lead. A campaign member can carry a member status, such as Sent, Responded, or a custom status, so teams can measure engagement and campaign performance. Campaign membership also supports attribution-related reporting by connecting individual lead or contact activity to the campaign that influenced it. Salesforce's campaign documentation describes adding existing leads and contacts as campaign members, and its data model identifies Campaign Member as the junction record used for campaign participation by leads and contacts. For more information, see Salesforce Help: Add Campaign Members and Salesforce Object Reference: CampaignMember.

QUESTION NO: 129

Export to Excel is available for Printable Lists:

A. True

B. False

ANSWER: A

Explanation:

True is correct. In Salesforce Classic, a user can export the records displayed in a list view by first opening the list's Printable View and then selecting *Export to Excel*. The printable version presents the list data in a format intended for printing or spreadsheet export, allowing users to work with the displayed records in Microsoft Excel. This is a useful administrative and end-user capability when someone needs a simple, tabular extract of list-view data rather than a formatted report.

The exported content reflects the records and fields available through the list view, subject to the user's Salesforce access. In particular, users can export only data that they are permitted to view, so object permissions, field-level security, sharing, and the list view's filtering continue to protect data. Administrators should also be aware that this functionality is distinct from report exports and from the Data Export Service, which are used for different export needs and data volumes. Salesforce documents the list-view export process as opening the printable view and choosing the Excel export action. See Salesforce Help for exporting list views and the Salesforce guidance on creating and managing list views.

QUESTION NO: 130

Ursa Major Solar uses a validation rule to prevent invalid data. What are three conditions where this rule is used? (Choose three.)

A. When records are updated by a workflow rule.

B. When records are imported.

C. When records are edited and saved by a user.

D. When records are deleted by a user.

E. When records are submitted using web-to-lead.

ANSWER: B C E

Explanation:

Validation rules enforce data-quality requirements whenever Salesforce evaluates a record being created or saved through supported record-entry processes. Therefore, they apply when records are imported, when users edit and save records, and when leads are submitted through Web-to-Lead. During an import, Salesforce processes each incoming row as a record save; a record that meets a validation rule's error condition cannot be saved, and the import results identify the failure. Likewise, a user saving changes through the Salesforce interface triggers validation-rule evaluation before the record is committed, helping ensure required business conditions are met consistently.

Web-to-Lead also creates Lead records in Salesforce, so validation rules on Lead are evaluated for those submissions. This allows an administrator to reject or otherwise prevent lead records that do not satisfy the organization's defined data standards. Validation rules use a formula that returns true when the data is invalid, at which point Salesforce displays the configured error message and does not save that record. Salesforce documents that validation rules verify data entered by users meets specified standards, and its Web-to-Lead documentation confirms that web form submissions create leads in Salesforce. See Salesforce Validation Rules and Salesforce Web-to-Lead.

QUESTION NO: 131

The administrator at Aw Computing wants Account Details, related list and chatter feeds to each

appear on separate tabs when reviewing an account.

Which type of page should the administrator create?

A. Lightning app page.

B. Lightning page Tab.

C. Lightning record page.

D. Lightning page Component.

ANSWER: C

Explanation:

Lightning record page. is the appropriate page type because the requirement applies to users while they are viewing an individual Account record. In Lightning App Builder, an administrator can create or customize an object-specific Lightning record page for Account and use the standard Tabs component to organize record content into separate tabs. The administrator can place record-detail content on a Details tab, related-list components on a Related tab, and the Chatter component or feed on a Chatter tab. This gives users a focused record-viewing experience while keeping the Account's information, related records, and collaboration feed readily available in one record page.

Lightning record pages can be assigned at the organization default level, by app, record type, and profile, allowing the administrator to deliver the tabbed layout to the appropriate Account users. The page is then activated as the Account object's Lightning record page. Salesforce documents the available Lightning page types and explains that record pages are designed for record-detail experiences. See [Salesforce Help: Lightning page types] and [Trailhead: Customize Lightning Experience Record Pages].

QUESTION NO: 132

What can an administrator customize for the Service Cloud console?

A. Whether the record opens as a primary tab or subtab

B. The fields displayed in the highlights panel

C. The interaction log fields displayed for objects without an Activity History related list

D. Whether the SoftPhone displays in the footer or sidebar

E. The objects displayed in the navigation tab

ANSWER: A B E

Explanation:

For the Salesforce Service Cloud console, administrators can configure how records open so that an object opens as either a primary tab or a subtab. This controls the console's workspace behavior and helps agents retain related records in context while working on a customer interaction. Administrators can also configure the fields shown in the highlights panel. The highlights panel presents important record details at the top of a workspace, enabling agents to see key information without navigating elsewhere on the page. In addition, administrators can select the objects displayed in the navigation tab, tailoring the console application to the records and work items that service agents need to access regularly. These settings are part of console app and record-page configuration and are intended to create an efficient, agent-focused workspace. Salesforce's console guidance explains the workspace model of primary tabs and subtabs, while its Lightning app documentation covers configuring navigation items for an app. See [Salesforce Trailhead: Service Console Basics] and [Salesforce Help: Customize Navigation Items].

QUESTION NO: 133

Which two objects can an Administrator customize the Stage Setup Flow? (Choose two.)

A. Leads

B. Opportunities

C. Campaigns

D. Campaign Members

ANSWER: A B

Explanation:

Administrators can customize the stage-related picklist values used by both **Leads** and **Opportunities**. For leads, the relevant progression field is *Lead Status*. Its values represent where a prospective customer is in the qualification process, such as New, Working, Qualified, or Unqualified. An administrator can add, edit, deactivate, and arrange these values so the lead lifecycle reflects the organization's process.

For opportunities, the relevant progression field is *Stage*. Opportunity stages represent progress through the sales cycle and can be configured with a stage name, type, probability, forecast category, and whether the stage is closed or won. These settings support consistent pipeline reporting, forecasting, and sales-process guidance. Salesforce also allows organizations to use sales processes and record types to make appropriate stage values available for different opportunity workflows.

Configuring Lead Status and Opportunity Stage is therefore a core administrative task when setting up a sales lifecycle. Salesforce documentation describes managing [Lead Status values] and [Opportunity Stage values] in Setup.

QUESTION NO: 134

UI component for tag Access (Choose 2)

A. Edit tag links

B. View tags on header

C. Sidebar widget

D. Search Tags

ANSWER: B D

Explanation:

Tags provide a lightweight way for users to categorize and retrieve Salesforce records. The appropriate user-interface components for accessing this functionality are **View tags on header** and **Search Tags**. When tags are displayed in a record header, users can immediately see the labels associated with that record and use them as navigational links to locate related tagged records. This makes tags visible in the context of the record being viewed rather than requiring a user to open a separate configuration area.

Search Tags supports the retrieval side of tagging. A user can search for a specific tag and then view records associated with it, allowing tags to serve as an informal cross-record grouping mechanism. This is useful when records are related by a topic, campaign, process, or other classification that is not represented by a standard field or formal relationship. Salesforce describes tags as user-defined keywords that help organize and find records; access through record-level tag display and tag searching supports those purposes. See Salesforce's Tags overview documentation and the Salesforce data organization learning material for related record-organization concepts.

QUESTION NO: 135

Can logins on specific days be restricted?

A. Yes

B. No

ANSWER: A

Explanation:

Yes is correct. Salesforce administrators can restrict when users assigned to a particular profile may log in by configuring that profile's Login Hours. Login Hours are defined separately for each day of the week, so an administrator can permit access during selected business days and hours while preventing login access outside those periods. To block access on a particular day, set that day's start time and end time to the same value. These restrictions are profile-based, meaning all users with the profile are governed by the same schedule unless they are assigned a different profile with different Login Hours. This is useful for enforcing organizational access policies, reducing access outside normal operating periods, and supporting environments where users should only work on scheduled days. Existing sessions are generally not immediately ended when a restricted period begins; the login-hour setting controls the ability to log in. Administrators configure this setting from the Login Hours area of the relevant profile. Salesforce documents profile login-hour restrictions in its Login Hours and Login IP Ranges help content and covers profile-based access controls in the Trailhead login access module.

QUESTION NO: 136

Which two actions should a Platform Administrator perform with Case escalation rules?

A. Send email notifications.

B. Change the Case Priority.

C. Reopen the Case.

D. Reassign the Case.

ANSWER: A D

Explanation:

Case escalation rules automate follow-up when a case has met defined criteria and remains unresolved for the amount of time specified in an escalation action. **Send email notifications.** is correct because an escalation action can notify the case owner, a designated user, or additional email recipients when the escalation occurs. This gives support leadership or other stakeholders timely visibility into cases that may be at risk of missing a service commitment.

Reassign the Case. is also correct because an escalation action can automatically change the case owner. The administrator can route the case to an appropriate user or queue so that responsibility moves to a team able to address the issue. Escalation rules therefore support service processes by combining time-based monitoring with automated ownership routing and notification.

Administrators define the rule criteria that determine which cases are eligible, then configure escalation actions with an age-over threshold and the desired owner and notification settings. Salesforce documents escalation rules as a Case-management feature for automatically escalating cases that have not been resolved within a specified period. See Salesforce Help: Set Up Escalation Rules and Trailhead: Escalate Cases.

QUESTION NO: 137

Which action type is represented by an icon in the process visualizer? Choose 2 answers

A. Request rejection details

B. View recall details

C. Start a new task

D. Send an email alert

ANSWER: C D

Explanation:

The process visualizer uses graphical icons to make configured automation actions easy to identify within a process. **Start a new task** is represented because task creation is a supported automated action: the process can create and assign a task to a user, queue, or record owner as part of the automated business workflow. The visual representation helps an administrator recognize that the process includes work being assigned for follow-up.

Send an email alert is also represented by an icon because email alerts are supported process actions. An email alert uses a predefined email template and recipient configuration, allowing the automation to notify users when the process criteria are met. Displaying this action visually is useful when reviewing a process because it distinguishes notification steps from record-update and task-assignment steps.

These action icons provide an at-a-glance view of what happens after the process evaluates its criteria, helping administrators understand the sequence and purpose of the automation without opening each action’s detailed configuration. Salesforce documentation describes automated actions, including task creation and email alerts, in its workflow and process automation resources: Salesforce Help: Workflow Actions and Trailhead: Business Process Automation.

QUESTION NO: 138

FILL BLANK

List the objects that may have Sharing Rules

A. Lead, Account, Contact, Opportunity, Case, Campaign, and custom objects.

ANSWER: A

Explanation:

Lead, Account, Contact, Opportunity, Case, Campaign, and custom objects may have sharing rules. Sharing rules are a declarative Salesforce security feature that administrators use to extend record access beyond the organization-wide default and role hierarchy. They can share records owned by specified users or roles, or records that meet defined criteria, with public groups, roles, roles and subordinates, territories where applicable, or specified users. For example, an administrator can share all campaign records owned by a marketing role with a sales group, or share high-priority cases with a support escalation group.

These objects are available in the Sharing Settings area because Salesforce supports configurable record-level sharing rules for them. For custom objects, sharing rules become available when the object's sharing setting is configured to support record-level access. Administrators should first establish the appropriate organization-wide default, then use sharing rules to grant the additional access required for collaboration without broadly opening access to every record. Salesforce describes sharing rules and their supported rule types in the Security Implementation Guide and provides administration guidance in Salesforce Help: Sharing Settings.

QUESTION NO: 139

Select the user permissions which override field-level security: (Choose all that apply.)

A. Modify All Data

B. View All Data

C. Configure UI

D. View Encrypted Data

E. View All Fields

F. Edit All Fields

ANSWER: E F

Explanation:

The permissions that override field-level security are **View All Fields** and **Edit All Fields**. View All Fields grants read access to fields even when the user would otherwise be denied visibility through field-level security. Edit All Fields grants the ability to edit fields regardless of field-level security restrictions; because editing requires access to the field, it also provides the necessary field visibility. These permissions are intended for exceptional administrative or integration-style use cases where access across fields must be granted without maintaining individual field permissions.

Field-level security remains Salesforce's primary mechanism for controlling access to specific standard and custom fields. Object-level permissions, sharing settings, and record-level access remain separate layers of the platform's security model. Salesforce explicitly notes that broad data permissions such as View All Data and Modify All Data do not override field-level security. Similarly, access to unmasked encrypted values is governed by the View Encrypted Data permission only after the user has access to the encrypted field itself. For more detail, see Salesforce's Field-Level Security documentation and the Permission Set overview.

QUESTION NO: 140

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:

Merge Fields are used in Salesforce Prompt Builder to bring contextual CRM data into a prompt template at runtime. For a case-summary template, the administrator can insert merge fields representing values from the Case record, such as its subject, description, status, priority, or related-account information. When the template is invoked for a particular case, Salesforce resolves those fields to the actual values on that record before the prompt is sent to the large language model. This grounds the generated response in the relevant Salesforce data and enables the model to produce a case-specific summary rather than a generic response. Prompt Builder supports merge fields for inputs and related data, allowing an administrator to compose instructions that combine fixed guidance with dynamically resolved record information. This is the standard declarative approach when the needed information is available in the template's record context. For more detail, see Salesforce's Prompt Builder documentation and the Prompt Builder Basics Trailhead module.

QUESTION NO: 141

When converting a lead, what values are transferred to the opportunity?

A. Amount = Lead Amount

B. Close Date = Today

C. Close Date = Last day in fiscal quarter

D. Stage = First stage in list

ANSWER: C D

Explanation:

When a user converts a lead and chooses to create an opportunity, Salesforce supplies standard default values for required opportunity fields. **Close Date = Last day in fiscal quarter** is correct because the conversion process defaults the new opportunity's close date to the final day of the current fiscal quarter. This provides a valid initial date while allowing the user to revise it based on the expected sales timeline.

Stage = First stage in list is also correct. Salesforce uses the first value in the organization's opportunity Stage picklist as the initial stage for an opportunity created during lead conversion. Administrators can control this behavior indirectly by maintaining the Stage picklist values and their ordering, ensuring that the first stage represents the appropriate starting point in the company's sales process. These defaults apply when Salesforce creates the opportunity as part of conversion and help ensure required opportunity data is present from the start. See Salesforce's lead conversion documentation and the Opportunity fields documentation.

QUESTION NO: 142

Is it possible for a user to see different Set of data in Report and in a Dashboard based on the same Report?

A. Yes

B. No

ANSWER: A

Explanation:

Yes is correct. A report is normally executed in the context of the user who runs it, so its results reflect that user's object permissions, field-level security, sharing access, and role-based record visibility. A dashboard built from that report can instead be configured to run as a specified user, often called the running user. In that configuration, dashboard components show the data that the designated running user can access, rather than necessarily the data accessible to the person viewing the dashboard. Consequently, the same underlying report can produce a different visible data set when viewed directly as a report versus when its results are displayed on a dashboard.

Administrators should select the dashboard running user carefully because that choice determines the scope of data exposed through dashboard components. Where available, a dynamic dashboard is an alternative that runs as the viewing user; however, the question asks whether different data is possible, and a dashboard with a specified running user establishes that it is. Salesforce's guidance on dashboard security and running users is available in [Dashboard Running User documentation] and the [Salesforce Trailhead module on securing reports and dashboards].

QUESTION NO: 143

Supervisors at Universal Containers have read access to Contacts through their profiles. Sales reps have a separate profile them to edit Contacts. Some sales reps are attending a conference for a week and supervisors will need to fill in to update Contact details while they are out.

How should an administrator grant proper access to the supervisors?

A. Assign a permission set with the edit permission on Contact to the supervisors that need it.

B. Create a sharing rule to grant read/write access on Contact to the supervisor role.

C. Update the supervisor profile with edit permission on Contact.

D. Change the supervisor users' profiles to be sales rep.

ANSWER: A

Explanation:

Assign a permission set with the edit permission on Contact to the supervisors that need it. A permission set is designed to extend a user's existing access without changing the user's profile. In this situation, supervisors already have the baseline object access needed to view Contacts, but a limited group needs temporary additional ability to edit Contact records while sales representatives are away. Assigning a permission set provides that incremental object-level permission only to the affected supervisors, preserving the standard access model for other supervisors and avoiding a broad, permanent profile change. When the conference ends, the administrator can simply remove the permission set assignment to return those users to their prior level of access. This is consistent with Salesforce's principle of using profiles for baseline permissions and permission sets for additional permissions for selected users. Object permissions such as Read and Edit determine what a user can do with records of an object, while record-level sharing still determines which specific records the user can access. Salesforce documents permission sets and permission set assignments at [Permission Sets Overview] and explains object permissions in [User Permissions and Access].

QUESTION NO: 144

The administrator at universal containers has a screen flow that helps users create new leads.

When lead source is "Search Engine", the administrator needs to require the user to choose a specific

a search engine from a picklist. If lead source is not "Search Engine", this picklist should be hidden.

How should the administrator complete this requirement?

A. Assign a decision element to direct the user to a second screen to hold specific search engine only when a lead source is "Search Engine".

B. Use an assignment element, one for when lead source is "Search Engine" and one for everything else.

C. Create a picklist for specific search engine, and set conditional visibility so that it is only shown when lead source is “Search Engine”.

D. Configure a picklist for specific search engine, and use a validation rule to conditionally show only when lead source is “Search Engine”

ANSWER: C

Explanation:

Create a picklist for specific search engine, and set conditional visibility so that it is only shown when lead source is “Search Engine”. This configuration directly supports both parts of the requirement within the same Flow screen. The administrator adds a picklist screen component for the specific search engine values and marks that component as required. Then, in the component’s Set Component Visibility configuration, the administrator defines a condition that displays the component only when the Lead Source screen component’s selected value equals “Search Engine.”

Conditional visibility is evaluated as the flow user interacts with the screen. When “Search Engine” is selected, the specific-search-engine picklist becomes visible and, because it is required, the user must select a value before proceeding. When any other lead source is selected, the component is hidden and does not need a value. This produces a focused user experience without adding unnecessary screens or flow-navigation logic, while ensuring the required information is collected precisely when applicable. Salesforce documents conditional component visibility for screen flows and the available configuration of screen components in Flow Builder in the Set Component Visibility documentation and the Screen Components reference.

QUESTION NO: 145

The administrator wants to track data over a period of time. Which graph would he use?

A. Line

B. Horizontal bar line

C. Pie

D. Table

ANSWER: A

Explanation:

A line graph is the appropriate choice for tracking data over a period of time because it displays values along a continuous progression, typically using dates or other chronological intervals on the horizontal axis. Connecting the plotted values makes overall direction and changes easy to see, such as whether case volume is rising week by week, opportunities are trending upward by quarter, or support response time is improving month over month. Salesforce report charts support line charts for visualizing trends in summarized report data. To create a meaningful time-based chart, the underlying report should group records by an appropriate date field and interval, such as calendar month or fiscal quarter, and summarize the metric being monitored, such as record count, amount, or average duration. This lets an administrator turn report data into a dashboard component that communicates changes at a glance and supports ongoing monitoring. Salesforce describes report charts as visual representations of report data and provides configuration guidance in its reports and dashboards documentation. See Salesforce Help: Chart Reports and Trailhead: Visualize Your Data with Dashboards.

QUESTION NO: 146

Use Custom Summary Formulas to create calculated summaries on numerical fields in _________ and ________ reports.

A. Tabular and Summary

B. Custom and Standard

C. Summary and Matrix

D. Matrix and Tabular

ANSWER: C

Explanation:

Summary and Matrix is correct. Salesforce custom summary formulas let report builders calculate values from summarized numeric fields, such as totals, averages, minimums, maximums, record counts, and other aggregate results. These formulas are evaluated at the grouping level and can also be displayed for grand totals, allowing an administrator to create calculations such as a percentage of the overall total, the difference between grouped totals, or a derived metric based on aggregate values.

This capability requires a report format that groups records and produces summary values. Summary reports organize data into row groupings, while matrix reports organize data into both row and column groupings. Because these report formats provide the grouped aggregates on which the formula operates, they support custom summary formulas. Salesforce also permits the resulting formula to be shown at selected summary levels, making it useful for comparing performance across categories, owners, periods, or other report groupings. For more information, see Salesforce's Custom Summary Formulas documentation and the Reports and Dashboards Formulas Trailhead module.

QUESTION NO: 147

Which of the following utilize the "Automated Case User"? (Choose all that apply.)

A. When a case is automatically assigned using assignment rules this user is listed in the case history

B. When a email notification is triggered via workflow this user is listed in the case history

C. When a case is escalated this user is listed in the case history

D. When a case is created via Web-To-Case this user is listed in the case history

E. When a case is created via Email-To-Case this user is assigned as the case owner.

ANSWER: A C D

Explanation:

The Automated Case User is the designated user Salesforce records in Case History when certain case actions are performed automatically by Salesforce rather than manually by an individual user. This provides an audit trail that identifies the system context responsible for an automated action. When a case is automatically assigned using assignment rules, Salesforce records the Automated Case User in the case history for the assignment action. Similarly, when an escalation rule escalates a case, the automated escalation action is attributed to this user in Case History. Cases submitted through Web-to-Case also use the Automated Case User in their history because the case is created through an automated intake mechanism. Administrators configure this user in Support Settings so automated case-processing activity has a consistent, identifiable history entry. Salesforce documents the Automated Case User as the user associated with automated processes such as assignment rules, escalation rules, and Web-to-Case. See Salesforce Support Settings documentation and Salesforce Web-to-Case documentation.

QUESTION NO: 148

Ursa Major Solar utilizes Accounts in its Sales process; however, not all users have access to them. New users require Read access to Accounts. Additionally, four new users require Edit access.

What should an Administrator do to configure access for the new users?

A. Configure a profile to grant Account View access and a Permission Set to grant Account Edit access to specific users.

B. Configure a profile to grant Account Edit access and a Permission Set to restrict Read access to specific users.

C. Configure a sharing rule for Account View access and another sharing rule for Edit access to specific users.

D. Configure a Permission Set to grant Account Edit access to specific users and modify the Standard User profile.

ANSWER: A

Explanation:

Configure a profile to grant Account View access and a Permission Set to grant Account Edit access to specific users. A profile establishes each user's baseline permissions, including object-level access such as the ability to view (read), create, edit, or delete Account records. Assigning a profile with Account View access to the new users provides the common minimum access requirement consistently.

A permission set is the appropriate way to extend permissions for only the users who need additional capabilities. The administrator can create or use a permission set that grants Account Edit permission and assign it to the four specified users. Permission sets are additive: they grant additional access without changing the baseline profile or reducing permissions for anyone else. This supports least-privilege access while avoiding the need to create separate profiles merely for a small group with an extra requirement.

Object permissions determine what actions a user can perform on Account records generally. Record-level sharing and organization-wide defaults can still determine which individual Account records those users can access, but the profile-plus-permission-set design correctly configures the required object permissions. Salesforce documents profiles and permission sets at User Permissions and Access and explains permission-set assignment at Assign Permission Sets.

QUESTION NO: 149

FILL BLANK

How does Cloud Scheduler Work?

A. Salesforce creates a unique web page with proposed meeting times; invitees select suitable times, Salesforce tracks their responses, and the organizer confirms the meeting.

ANSWER: A

Explanation:

Cloud Scheduler works by creating a meeting request with proposed time slots and generating a unique web page for that request. The organizer sends the invitation to attendees, such as contacts or leads. Each invitee opens the web page, selects the proposed times that work for them, and submits a response. Salesforce collects and tracks those responses for the organizer, making it possible to compare attendees' availability and choose the most suitable time. Once the organizer selects a time and confirms the meeting, Salesforce creates the event and associates it with the relevant records. This feature is designed to reduce the back-and-forth involved in finding a mutually acceptable meeting time while keeping the scheduling activity connected to Salesforce records. Cloud Scheduler is documented as a Salesforce activity-management capability; see Salesforce's Cloud Scheduler documentation and the Salesforce Activities documentation.

QUESTION NO: 150

With Spring '11, a new version of Chatter Desktop is available with performance optimizations and enhancements that let you:

A. Click files to preview them

B. Subscribe to a user

C. Select the To: Me tab to see posts directed to you

D. Click groups and users to view their feeds

E. Post to a group or user's feed

F. Subscribe to a user feed post

ANSWER: A C D E

Explanation:

The Spring '11 Chatter Desktop update added several direct feed-navigation and posting improvements. **Click files to preview them** reflects the enhanced ability to open a file preview from the desktop client, allowing users to review shared content without leaving the Chatter Desktop experience. **Select the To: Me tab to see posts directed to you** provides a focused view for posts that specifically mention or target the current user, helping users identify conversations requiring their attention.

The update also improved access to Chatter conversations across the organization. With **Click groups and users to view their feeds**, users can move directly from the desktop client to the relevant group or person's feed and review its activity. Finally, **Post to a group or user's feed** enables users to contribute updates to the appropriate collaboration space or individual directly from Chatter Desktop. Together, these capabilities make the desktop application more useful for reviewing files, following directed conversations, navigating feeds, and publishing updates. Salesforce's Chatter product documentation is available through the Salesforce Chatter overview, and historical release documentation can be accessed from the Salesforce Chatter Developer Guide.

QUESTION NO: 151

Which statements are true about business processes?

A. Each business process is associated with one or more record types

B. Each record type is associated with one or more business processes

C. For opportunity objects records are created before business processes

D. Record types implement business processes through page layouts

E. Record types help track sales lifecycle s across divisions, groups and markets.

ANSWER: A D

Explanation:

"Each business process is associated with one or more record types" is true because a business process defines the available values for a process-related standard picklist, such as Opportunity Stage, Lead Status, or Case Status. Administrators assign a business process to record types, and the same business process can be reused by multiple record types where those record types require the same lifecycle or status values.

"Record types implement business processes through page layouts" is also true in the practical configuration sense. A record type brings together the selected business process with a page-layout assignment, allowing different users or teams to follow the appropriate process while seeing a tailored record interface. For example, separate opportunity record types can expose different sales-stage processes and present different layouts for different sales teams. Salesforce describes record types as a way to offer different business processes, picklist values, and page layouts to different users. Learn more in Salesforce's Record Types documentation and the Trailhead record types module.

QUESTION NO: 152

If I'm looking at a detail page, do I know what record type it is?

A. Yes

B. No

ANSWER: B

Explanation:

No is correct because a record detail page alone does not reliably identify the record type assigned to the record. Record types control such things as the business processes, picklist values, and page layouts that users receive, but the visible layout is not a unique record-type identifier. For example, an administrator can assign the same page layout to more than one record type, so observing the fields and sections on a detail page is not enough to establish which record type is in use. The displayed page can also vary because of Lightning record-page configuration, dynamic forms, user permissions, and component visibility, none of which changes the underlying record type. To identify a record type with certainty, use an explicit source of record metadata, such as the record's `RecordTypeId` through the API, a report/query that includes record type information, or an intentionally configured user interface element that exposes it. Salesforce defines record types as metadata used to offer different business processes, picklist values, and page layouts to users; they are not inferred from the detail-page appearance. See Salesforce's Record Types Trailhead module and the RecordType API reference.

QUESTION NO: 153

Which of the following are standard Salesforce applications?

A. Ideas

B. Campaigns

C. Administration

D. Call Center

E. Sales Center

ANSWER: A D

Explanation:

Ideas and **Call Center** are standard Salesforce applications. Ideas provides a workspace where users can submit, vote on, and discuss suggestions, helping organizations collect and prioritize feedback from customers, partners, or internal users. When the Ideas feature is enabled, Salesforce provides the associated standard functionality for managing idea communities and idea records.

Call Center is also a Salesforce standard application. It is intended for service teams and presents a console-style workspace that helps agents access customer and case information while handling support interactions. Call Center configurations can additionally support computer telephony integration, allowing Salesforce to work with a compatible telephony system. Standard applications are Salesforce-provided app experiences that can be made available to users through profiles, permission sets, and app navigation, rather than being apps an administrator must build from scratch.

For background on working with apps and app navigation, see Salesforce Trailhead: Manage Your Apps. For Salesforce guidance on configuring call-center functionality, see Salesforce Help: Call Center Overview.

QUESTION NO: 154

The Administrator at Ursa Major Solar needs to provide information for Total Salesforce Licenses, Used Licenses, and the Remaining Salesforce licenses.

Where is Setup can this information be found?

A. Company Information

B. Users

C. Profiles

D. Critical Updates

ANSWER: A

Explanation:

Company Information is the Setup page that provides an organization-level view of Salesforce license allocation. An administrator can open Setup, search for and select Company Information, and review the User Licenses related list. This list displays each license type available to the org and includes the total number of licenses purchased, the number currently used, and the number remaining. This is the appropriate place to obtain the requested figures because it consolidates license consumption across the entire Salesforce organization rather than showing details for only an individual user or configuration item.

Keeping track of these values helps an administrator manage user provisioning, identify whether capacity is available before creating or activating users, and plan for additional licenses when the organization approaches its entitlement limit. Salesforce documents the Company Information page as the location for viewing license usage and related organization information. For the Setup navigation and organization details available on this page, see Salesforce Help: View Company Information. Additional guidance on user-license management is available in Salesforce Help: User Licenses.

QUESTION NO: 155

What objects have standard business processes?

A. Leads

B. Opportunity

C. Cases

D. Contacts

E. Sales (Opportunities)

F. Solutions

ANSWER: A B C E F

Explanation:

Standard business processes are reusable definitions that control the available values for key lifecycle picklists on several standard Salesforce objects. **Leads** use a Lead Process to define the Lead Status values available to different record types. **Opportunity** and **Sales (Opportunities)** refer to the Opportunity object, which uses a Sales Process to control the Stage values available for its record types. This lets an organization tailor sales stages to distinct selling motions while retaining consistent reporting and forecasting behavior. **Cases** use a Support Process to define the Case Status values available for case record types, supporting different service workflows. **Solutions** use a Solution Process to control Solution Status values. These process definitions are associated with record types, so administrators can present the appropriate statuses or stages to users without creating separate custom fields for each workflow. Salesforce documents business processes as configuration components for lead, opportunity, case, and solution lifecycle values. See Salesforce's Record Types documentation and the Business Processes documentation.

QUESTION NO: 156

When are Formula Fields recalculated?

A. Calculated automatically

B. Every 15 Minutes

C. Nightly

D. After Edits / Save

ANSWER: A

Explanation:

Formula fields are **calculated automatically**. Rather than storing a fixed value in the database, a formula field evaluates its expression dynamically when Salesforce needs to display, query, report on, or otherwise access the field value. The result therefore reflects the current values of the fields referenced by the formula, including related-record fields where supported. For example, if a formula combines an amount field with a discount field, the displayed formula result reflects the current amount and discount without an administrator or user needing to run a scheduled job or manually recalculate the field.

This dynamic behavior is an important distinction for administrators: formula fields provide real-time derived information while avoiding duplicated stored data. The formula definition itself is saved as metadata, and Salesforce evaluates that definition automatically as records are accessed. Salesforce describes formula fields as custom fields that automatically calculate a value based on other fields, expressions, or values. See Salesforce Help: Custom Field Types and Trailhead: Formula Fields.

QUESTION NO: 157

A group of sales reps can view each otherâ€™s orders on a report; however, they would like a report to view just their own orders. What should a Platform Administrator do to set up a report for the sales reps? 31

A. Set the Opportunity Filter for Primary as True.

B. Filter by Order Owner equals $USER.

C. Set Organization Wide Defaults of Order object to Private.

D. Save the report in a private folder for the user.

ANSWER: B

Explanation:

Filter by Order Owner equals $USER. The `$USER` global variable resolves to the currently logged-in user when the report runs. Consequently, one shared report can dynamically display only the orders owned by the individual sales rep viewing it, without requiring the administrator to create and maintain a separate report for every rep. This approach is appropriate when users retain access to peer records but need a focused personal report for day-to-day work. The filter affects the report results rather than changing underlying record-sharing access, so it supports a personalized view while preserving the organization’s existing sharing model. Salesforce reports support filtering on record-owner fields, and Salesforce global variables can be used to supply the current user’s identity in applicable contexts. An administrator should create or edit the Orders report, add an owner filter, select the current-user value, and save the report in a folder that the intended sales reps can access. For details on report filters, see Salesforce Help: Filter Report Data. For Salesforce global variables, see Salesforce Help: Global Variables.

QUESTION NO: 158

Which Salesforce editions provide option for customizing profiles?

A. All Editions

B. Unlimited, Developer and Enterprise Editions

C. Professional, Unlimited, and Developer Editions

D. Enterprise, Unlimited, and Developer Editions

E. All except Group Edition

F. All except Professional Edition

ANSWER: B D

Explanation:

Enterprise Edition, Unlimited Edition, and Developer Edition support customizing profiles. A profile is a collection of user settings that establishes a user's baseline permissions, such as object access, field-level security, app access, tab visibility, login hours, login IP ranges, and system permissions. In these editions, an administrator can create custom profiles or clone an existing profile and tailor it to the organization's job functions and access-control requirements. This enables administrators to apply least-privilege access while providing users the functionality needed for their roles.

The two correct responses contain the same three editions, merely presented in a different order: *Unlimited, Developer and Enterprise Editions* and *Enterprise, Unlimited, and Developer Editions*. Developer Edition is intended for development and testing, but it includes Enterprise Edition-level functionality for configuration purposes, including profile customization. Salesforce documents profile administration and the distinction between standard and custom profiles in its Help documentation. See [Salesforce Help: User Profiles] and [Salesforce Help: Manage Profiles].

QUESTION NO: 159

When transferring an account from one user to another, which of the following options are selectable? (Choose all that apply.)

A. Transfer open cases

B. Transfer open opportunities

C. Transfer open activities

D. Transfer closed activities

ANSWER: A B C

Explanation:

When an administrator transfers ownership of an account, Salesforce provides related-record transfer selections so that active work associated with the account can move to the new owner as appropriate. The selectable categories are open cases, open opportunities, and open activities. Selecting open cases helps ensure that current customer-support work is assigned to the person now responsible for the account. Selecting open opportunities keeps active sales pipeline records aligned with the new account owner. Selecting open activities transfers outstanding tasks and other unfinished activity work, helping the receiving user continue follow-up without requiring manual reassignment of each item.

These options focus on records that are still in progress and therefore need an active owner to continue work. Salesforce documents the available related-record transfer choices as part of the account ownership-transfer process. Administrators should review the selected items before saving the transfer because the choices determine which active records are reassigned along with the account. See [Salesforce Help: Transfer Accounts] and [Trailhead: Control Access to Records].

QUESTION NO: 160

If your organization has territory management, account and opportunity list views can be restricted by: (Choose all that apply.)

A. My Territories

B. My Territory Teams.

C. My Accounts Territories

ANSWER: A B

Explanation:

Territory management supports territory-based access and visibility for accounts and related opportunities. For users working with territory assignments, list views can be scoped to **My Territories**, which limits the displayed records to those associated with territories to which the user is assigned. List views can also be scoped to **My Territory Teams.** This supports users who need to work with records across the territories represented by the team relationship, rather than viewing records without a territory-based restriction.

These territory list-view restrictions help sales organizations focus account and opportunity work on the geographic, industry, or named-account coverage areas defined by their territory model. Territory assignments can overlap and are not the same as the role hierarchy, allowing Salesforce to provide record visibility aligned with the organization's sales coverage strategy. Administrators should ensure that territory assignments, user territory assignments, and the applicable territory model are configured and active before relying on territory-based views. See Salesforce's Territory Management in Lightning Experience learning module and the Enterprise Territory Management overview for implementation and usage details.