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## Salesforce Plat-Admn-201 Exam Syllabus Topics:

Topic	Details

Topic 1	<ul style="list-style-type: none"> <li>• <b>Productivity and Collaboration:</b> This domain addresses activity management, Chatter collaboration, Salesforce mobile app customization, and AppExchange applications including managed and unmanaged packages.</li> </ul>
Topic 2	<ul style="list-style-type: none"> <li>• <b>Automation:</b> This domain covers automation tools for streamlining business processes, including assignment and escalation rules, Flow configuration for various scenarios, and approval process setup.</li> </ul>
Topic 3	<ul style="list-style-type: none"> <li>• <b>Agentforce AI:</b> This domain introduces AI-powered agents in Salesforce, covering use cases, configuration in Agent Builder, security considerations, and troubleshooting agent permissions.</li> </ul>
Topic 4	<ul style="list-style-type: none"> <li>• <b>Service and Support Applications:</b> This domain covers case management systems, including case assignment, queues, and automation through escalation rules, auto-response rules, and Einstein for Service.</li> </ul>

## Salesforce Certified Platform Administrator Sample Questions (Q126-Q131):

### NEW QUESTION # 126

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

**Answer: C**

Explanation:

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

### NEW QUESTION # 127

Ursa Major Solar classifies its accounts as Silver, Gold, or Platinum Level. When a new case is created for a Silver or Gold partner, it should go to the Regular Support Queue. When an account is Platinum Level, it should automatically go to the Priority Support Queue. What should a Platform Administrator use to achieve this?

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

**Answer: D**

Explanation:

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

### NEW QUESTION # 128

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

- A. Select Download Chart on the component.
- **B. Enable dashboard feed tracking.**
- C. Set View Dashboard As to the dashboard viewer.
- D. Enable reporting snapshots.

**Answer: B**

Explanation:

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

### NEW QUESTION # 129

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 continue conversations using the deactivated agent until reactivated.**
- B. The agent will pause the conversation and resume once 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: A**

Explanation:

In the Agentforce environment, deactivating an agent to make configuration changes (like adding a Topic or Action) does not immediately terminate existing sessions. To ensure a smooth user experience, Salesforce allows ongoing conversations to continue using the version of the agent that was active when the session started. The "deactivation" simply prevents new sessions from being initiated. Once the administrator reactivates the agent, new sessions will utilize the updated configuration, while current users finish their interactions without interruption or "system errors".

The window does not automatically close, and the conversation is not "paused" in a way that requires the user to wait for reactivation

### NEW QUESTION # 130

A Platform Administrator is designing a prompt template for a new agent. The agent's purpose is to help service reps troubleshoot technical issues by providing concise, step-by-step instructions. Based on best practices for creating effective prompts, which approach should the administrator use when writing this prompt? 16

- **A. Use natural, easy-to-understand language and clear, concise instructions to guide the AI's behavior.**
- B. Focus on providing high-level, theoretical concepts so the AI has the flexibility to respond creatively.
- C. Write a detailed prompt with multiple nested conditions to cover all the major troubleshooting scenarios.
- D. Use specific technical terms and abbreviations to ensure the AI understands the specialised domain.

**Answer: A**

Explanation:

Creating effective Agentforce prompts requires a focus on clarity and simplicity to ensure the Large Language Model (LLM) follows instructions accurately. According to Salesforce best practices, administrators should use natural, easy-to-understand language and provide clear, concise instructions<sup>1919</sup>. This approach helps the AI accurately reason through the task without becoming confused by overly complex or nested logic (Option A). While technical accuracy is important, relying heavily on jargon or abbreviations (Option B) can sometimes lead to unexpected results if the LLM interprets those terms differently in various contexts. Furthermore,

providing high-level theoretical concepts (Option C) often results in vague or "creative" answers that may not be helpful for technical troubleshooting, which requires specific and actionable steps<sup>22</sup>. Using direct instructions like "Summarize the issue in three bullet points" is more effective than broad guidelines.

## NEW QUESTION # 131

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