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Salesforce Certified Platform Foundations Sample Questions (Q67-Q72):

NEW QUESTION # 67

A Salesforce associate at Get Cloudy Consulting needs a list of all active contacts grouped by Account. What is the first step in building this report?

- A. Create a new report using the Contacts & Accounts report type.
- B. Create a joined report with accounts and contacts.
- C. Create a Contacts report with a filter on Account.

Answer: A

Explanation:

The first step in building a report that shows all active contacts grouped by account is to create a new report using the Contacts & Accounts report type. The report type determines the objects and fields that are available for the report. The Contacts & Accounts report type allows users to report on contacts and their related accounts, as well as account fields such as industry, annual revenue, and number of employees

NEW QUESTION # 68

A Salesforce associate wants a visual summary of opportunities in a list view. The associate would like to summarize, filter, and move opportunities along the pipeline. What should they do to meet this requirement?

- A. Create an Opportunities Kanban View.
- B. Create an Opportunity Summary report.
- C. Create an Opportunity List View.

Answer: A

Explanation:

The opportunities Kanban view is a visual summary of opportunities in a list view, where the associate can summarize, filter, and move opportunities along the pipeline by dragging and dropping them.

NEW QUESTION # 69

A Salesforce associate has been asked to identify all contacts that have had interactions with their company in the last year. What should the associate do to identify these contacts?

- A. Look at the contact's Last Modified Date.
- B. Look at the last related activity date.
- C. Look at the active field.

Answer: B

Explanation:

The last related activity date is a field on the contact object that shows the date of the most recent task or event related to the contact. This can be used to identify contacts that have had interactions with the company in the last year.

NEW QUESTION # 70

When a sales rep needs to give an additional discount for an opportunity, a manager needs to review and authorize the discount request.

What should be used to lock the record before a decision is made?

- A. validation rule
- B. Approval process
- C. Page layout

Answer: B

Explanation:

An approval process is a workflow that defines the steps and criteria for approving a record. It can be used to lock the record before a decision is made, and send email alerts and tasks to the approvers.

NEW QUESTION # 71

Get Cloudy Consulting currently stores information about its customers and partners in the Account object.

There are a few details specific to partners that are not applicable to customers.

What is the recommended way to display only the information applicable to each group?

- **A. Create record types on Account called Partner and Customer**
- B. Create custom object called Partner and Customer
- C. Use Account for customers and create a custom object for partners.

Answer: A

Explanation:

Creating record types on Account called Partner and Customer is the recommended way to display only the information applicable to each group. Record types allow different page layouts, picklist values, and business processes to be assigned to different users based on their profile. For example, the Partner record type could have a page layout that includes fields specific to partners, such as Partner Type, Partner Level, and Partner Status. The Customer record type could have a different page layout that excludes those fields. Using Account for customers and creating a custom object for partners would not be advisable, because it would create data silos and make reporting and sharing more difficult. Creating custom objects called Partner and Customer would not make sense, because they are both types of accounts and should use the standard Account object.

NEW QUESTION # 72

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