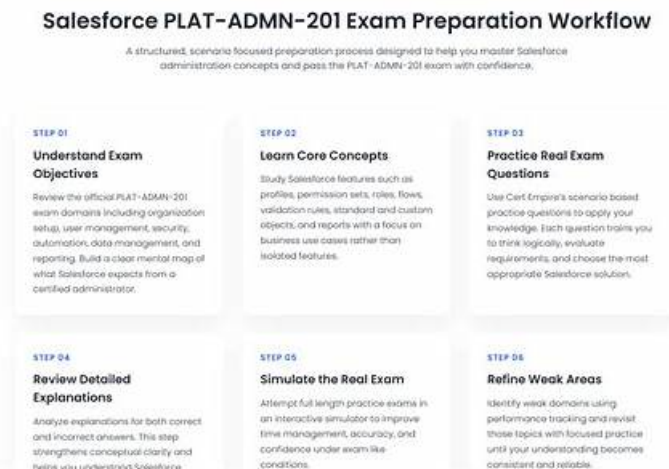


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Salesforce Plat-Admn-201 Exam Syllabus Topics:

Topic	Details
Topic 1	<ul style="list-style-type: none"> Data and Analytics Management: This domain focuses on data operations including importing, exporting, and backing up data, maintaining data quality through validation rules, and creating reports and dashboards while understanding sharing model impacts.
Topic 2	<ul style="list-style-type: none"> Agentforce AI: This domain introduces AI-powered agents in Salesforce, covering use cases, configuration in Agent Builder, security considerations, and troubleshooting agent permissions.
Topic 3	<ul style="list-style-type: none"> Service and Support Applications: This domain covers case management systems, including case assignment, queues, and automation through escalation rules, auto-response rules, and Einstein for Service.
Topic 4	<ul style="list-style-type: none"> Configuration and Setup: This domain covers foundational administrative tasks including company settings, user interface configuration, user management with licenses and access controls, and implementing security measures through login restrictions and the Salesforce sharing model.
Topic 5	<ul style="list-style-type: none"> Object Manager and Lightning App Builder: This domain focuses on Salesforce data architecture, including object relationships, field customization, page layout management, and understanding the implications of field deletions on dependent features.

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Salesforce Certified Platform Administrator Sample Questions (Q40-Q45):

NEW QUESTION # 40

Cloud Kicks has hired a new sales executive who wants to implement a document merge solution in Salesforce. How should a Platform Administrator implement this solution?

- A. Download the solution from AppExchange.
- B. Install a package from the Partner Portal.
- C. Create a managed package in AppExchange.
- D. Configure the package from Salesforce Setup.

Answer: A

Explanation:

Salesforce does not provide a robust, native "document merge" engine that can handle complex templates, headers, and advanced formatting out of the box. Therefore, the standard practice for implementing such a solution is to download a third-party application from the AppExchange. The AppExchange is the primary marketplace for Salesforce-integrated solutions, offering popular document generation tools like Conga Composer, Nintex DocGen, or S-Docs. These tools allow administrators to create professional-grade documents (like quotes, contracts, and invoices) by merging Salesforce record data into Word, PDF, or Excel templates. As a Platform Administrator, the process involves researching the best-fit app for the requirements, installing the package into a Sandbox for testing, and then deploying it to Production. This approach is highly efficient because it leverages existing, vetted technology that is specifically designed to handle the complexities of document generation, saving the organization from trying to build a costly and difficult-to-maintain custom solution using code or complex automation.

NEW QUESTION # 41

Cloud Kicks' management team is hoping to increase user productivity by switching to consoles instead of the current traditional Salesforce user interface. What should a Platform Administrator use to implement this request?

- A. App Manager
- B. Screen Flow
- C. Omni-Channel
- D. App Builder

Answer: A

Explanation:

To transition users from a standard "tab-based" application to a Lightning Console app, the Platform Administrator must use the App Manager in Setup. The App Manager is where all Lightning apps are created, edited, and assigned to user profiles. Within the App Manager, the admin can create a new app and select "Console Navigation" as the navigation style³⁹. Console apps allow users to work on multiple records simultaneously in a workspace tab-based layout, which is highly effective for productivity in fast-paced environments like sales or support⁴⁰. The Lightning App Builder (Option A) is used to design the pages within the app, but the app's overall structure and navigation style are defined in the App Manager⁴¹. Screen Flow (Option B) and Omni-Channel (Option D) are specialized tools that can be used within a console but do not create the console app itself.

NEW QUESTION # 42

A user at Northern Trail Outfitters is having trouble logging in to Salesforce. The user's login history shows that this person has attempted to log in multiple times and has been locked out of the organization. Which two steps should a Platform Administrator take to help the user log in to Salesforce?

- A. Use the unlock button on the user's record detail page.
- B. Reset the password policies to allow the user to login.
- C. Log in as the user to unlock the user and reset the password.
- D. Reset password on the user's record detail page.

Answer: A,D

Explanation:

When a user is locked out of Salesforce due to too many incorrect login attempts, the Platform Administrator must take specific actions on the user's record detail page to restore access. First, the administrator should click the Unlock button¹⁹. This clears the lockout status immediately²⁰. Second, because the user likely forgot their credentials (causing the failed attempts), the administrator should use the Reset Password button²¹. This sends a temporary link to the user's email, allowing them to create a new password and log in successfully. "Logging in as the user" (Option A) is a troubleshooting tool for existing sessions but cannot bypass a lockout or change a password on the user's behalf. Changing "Password Policies" (Option D) would affect the entire organization and is not a valid way to help a single locked-out individual.

NEW QUESTION # 43

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. Email Alert
- B. Field Update
- C. Chatter Post
- D. Autolaunched Flow

Answer: A,B

Explanation:

Salesforce Approval Processes allow administrators to define a series of steps to automate the approval of records. Within these processes, there are four specific types of automated actions that can be triggered during initial submission, approval, rejection, or recall:

Field Update: Used to change a value on the record, such as switching a "Status" field from "Pending" to "Approved." Email Alert: Used to send a templated email to specific users, such as notifying the submitter that their request was granted.

Task: Used to assign a follow-up task to a user.

Outbound Message: Used to send technical data to an external system via API.

While modern automation tools like Flow can post to Chatter or launch other flows, the native approval process engine is limited to these four specific actions. For a "time-off request" scenario, an Email Alert ensures the employee is notified, and a Field Update ensures the record reflects the new status, providing a clear audit trail of the business decision.

NEW QUESTION # 44

Sales reps miss key fields when filling out an opportunity record through the sales process. Reps need to move forward in stages but are unable to enter a previous stage. Which three options should a Platform Administrator use to address this need?

- A. Use Flow to mark fields required.
- B. Mark fields required on the page layout.
- C. Use validation rules.
- D. Enable guided selling.
- E. Configure Opportunity Path.

Answer: B,C,E

Explanation:

To ensure data integrity and guide sales reps through a structured process, a Platform Administrator should use a combination of tools. Opportunity Path (Option C) provides a visual representation of the stages and allows the admin to highlight "Key Fields" and "Guidance for Success" for each stage, making it clear what information is needed to progress. To enforce the entry of that data, Validation Rules (Option D) are used to prevent a user from moving to the next stage if specific fields are blank (e.g., AND(IsChanged(StageName), IsBlank(Discovery_Notes__c))). Additionally, marking fields as required on the Page Layout (Option A) ensures that the most fundamental data points are always captured. While Flow (Option B) can perform many tasks, it is not the primary way to mark fields as "required" in the UI. "Guided Selling" (Option E) is a specific term often associated with Salesforce CPQ rather than standard Opportunity management. Using Path, Validation Rules, and Page Layout requirements provides a robust framework for managing the sales lifecycle effectively.

NEW QUESTION # 45

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