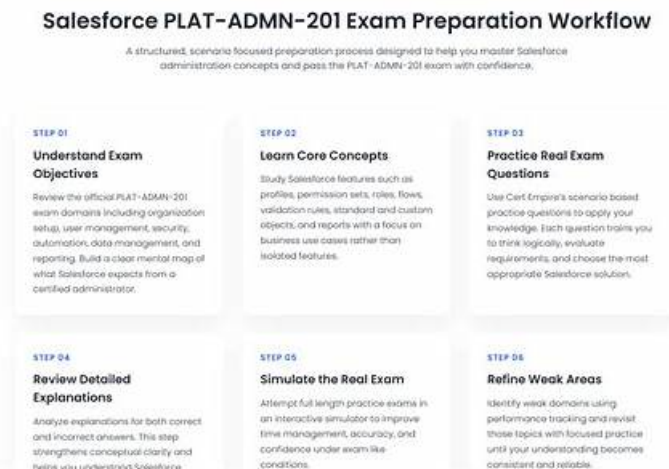


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Salesforce Plat-Admn-201 Exam Syllabus Topics:

Topic	Details
Topic 1	<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 2	<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 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"> 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.
Topic 5	<ul style="list-style-type: none"> Productivity and Collaboration: This domain addresses activity management, Chatter collaboration, Salesforce mobile app customization, and AppExchange applications including managed and unmanaged packages.
Topic 6	<ul style="list-style-type: none"> Automation: This domain covers automation tools for streamlining business processes, including assignment and escalation rules, Flow configuration for various scenarios, and approval process setup.
Topic 7	<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.

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Salesforce Certified Platform Administrator Sample Questions (Q140-Q145):

NEW QUESTION # 140

A sales rep has a list of 300 accounts with contacts that they want to load at one time. Which tool should a Platform Administrator utilize to import the records to Salesforce?

- A. Dataloader.io
- **B. Data Import Wizard**
- C. Data Loader
- D. Manual Import

Answer: B

Explanation:

The Data Import Wizard is the ideal tool for importing a relatively small number of records (up to 50,000) when those records involve standard objects like Accounts and Contacts simultaneously. One of the unique strengths of the Data Import Wizard is its ability to handle "Account and Contact" imports in a single pass, automatically linking the contacts to the correct accounts based on name or site. Because the volume in this request is only 300 records, the Data Import Wizard provides a simple, browser-based interface that includes built-in duplicate checking, which is highly beneficial for maintaining data quality. While the Data Loader (Option D) and Dataloader.io (Option A) can also handle 300 records, they are typically reserved for much larger datasets (up to 5 million records) or more complex objects. The "Wizard" is the most user-friendly and efficient choice for this specific sales rep request.

NEW QUESTION # 141

A sales rep typically has several open opportunities for each of their accounts. Which tool should a Platform Administrator suggest to the sales rep to obtain the total number of accounts associated with open opportunities in a report?

- **A. Unique Count**
- B. Report Filter
- C. Bucket Column
- D. Group Rows

Answer: A

Explanation:

When a report contains many rows where the same Account name appears multiple times (due to having several opportunities), a simple count of rows will not accurately represent the number of distinct accounts. To find the specific number of individual accounts, the Platform Administrator should use the Unique Count feature on the Account Name or Account ID column in the report builder. Selecting "Show Unique Count" provides a total at the bottom of the report (and in summary groupings) that counts each unique value only once, regardless of how many times it appears in the list. Bucket Columns (Option A) group data into categories⁴⁶. Report Filters (Option B) exclude records⁴⁷. Grouping Rows (Option D) visually organizes the report by Account but does not inherently provide a single summary number for the count of distinct accounts in the way that Unique Count does.

NEW QUESTION # 142

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. Create a managed package in AppExchange.

- B. Install a package from the Partner Portal.
- C. Configure the package from Salesforce Setup.
- **D. Download the solution from AppExchange.**

Answer: D

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 # 143

A Platform Administrator has been asked to change the data type of an auto number to a text field. What should the administrator be aware of before changing the field? 99

- A. Changing Auto Number field to Text is prevented.
- B. Existing field values will be deleted.
- **C. Existing field values will remain unchanged.**
- D. Existing field values will be converted.

Answer: C

Explanation:

In Salesforce, when a Platform Administrator changes a field's data type from Auto Number to Text, the operation is considered "safe" regarding data retention. The existing values that were automatically generated by the system (e.g., "INV-1001") will remain unchanged and stay within the field as static text strings¹². However, once the change is saved, the system will no longer increment or automatically generate new numbers for future records; users will have to enter data manually. It is important to note that the reverse operation—changing a Text field to an Auto Number—is different, as it would require the administrator to decide whether to overwrite existing data or only number new records¹⁴. Options B, C, and D are incorrect because Salesforce explicitly supports this specific conversion without deleting or fundamentally transforming the existing data into a different format other than plain text.

NEW QUESTION # 144

Senior leadership wants to be notified of any opportunities over \$250,000 with more than a 75% probability of closing. Which feature should a Platform Administrator set up to facilitate this?

- A. Guidance for Success
- B. Similar Opportunities
- **C. Big Deal Alerts**
- D. Reports and Dashboards

Answer: C

Explanation:

Big Deal Alerts are a specialized, "out-of-the-box" notification feature specifically for the Opportunity object. This tool allows a Platform Administrator to define a threshold based on "Amount" and "Probability." When an opportunity is created or updated and meets these thresholds (in this case, >\$250k and >75%), Salesforce automatically sends an email notification to a specified user or a list of stakeholders. This is the most efficient way to meet the requirement because it is a native feature designed exactly for high-value deal visibility. While Reports and Dashboards (Option C) can display this data, they are "pull" mechanisms that require leadership to actively check them, whereas a Big Deal Alert is a "push" mechanism that ensures immediate awareness. Guidance for Success (Option A) provides tips within a sales path, and Similar Opportunities (Option D) helps reps find related deals, but neither is designed for automated leadership notifications.

NEW QUESTION # 145

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