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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"> 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 3	<ul style="list-style-type: none"> Sales and Marketing Applications: This domain addresses sales cycle management from leads to opportunities, including productivity features, lead automation, campaign management, forecasting, and Einstein for Sales capabilities.
Topic 4	<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 (Q85-Q90):

NEW QUESTION # 85

A Platform Administrator is creating a new action instruction for an agent. This action, named createCase, is designed to generate a new Salesforce Case record based on the user's conversation with the agent. Which set of Action Instructions should the administrator use for the createCase action, according to best practices for action instructions?

- A. "The createCase code snippet is configured to create a case. It runs in the background to handle the user's request to log a new issue. Its purpose is to solve the customer's issue."
- B. "Use this action to create a new Salesforce Case record. The goal is to document a customer's issue in the system. Use this when the user's intent is to create a formal record of their problem or question."
- C. "This action provides the ability to create a new case record in the Salesforce system. Its function is to simply save customer information as a record. Use this when the user wants to create a case."
- D. "Creates a new case record in the system for any type of customer inquiry. The purpose of this is to ensure a record of the interaction is saved."

Answer: B

Explanation:

Best practices for Agentforce Action Instructions emphasize clarity, intent, and specific usage scenarios to help the LLM (Large Language Model) understand exactly when and why to trigger an action. Option B is the best choice because it explicitly defines the Action (create a Case), the Goal (document a customer's issue), and the User Intent (formal record of a problem or question). High-quality instructions act as a guide for the agent's reasoning process. Vague instructions, like those in Option A or C, may lead to the agent triggering the action at inappropriate times, such as during a simple inquiry that doesn't require a formal case. Instructions that focus on "code snippets" (Option D) are less effective because the LLM needs to understand the functional business context rather than the technical implementation details to interact naturally with the user.

NEW QUESTION # 86

Users have reported that the new Lightning account record page is loading very slowly. Which feature should a Platform Administrator use to determine the cause of the performance issues? 2424

- A. Lightning Usage App
- B. Lightning Page Visibility Rule
- C. Lightning App Builder Analytics
- D. Lightning Analytics

Answer: C

Explanation:

The Lightning App Builder includes a built-in Analysis tool (often referred to as Page Analysis or Analytics) that provides administrators with a performance score for a record page. This tool evaluates the page's metadata and components to identify factors that contribute to slow load times, such as having too many fields in a single section, using complex related lists, or including multiple heavy Lightning Web Components. It provides specific suggestions, such as using "Dynamic Forms" to break up the page or moving less-used components into separate tabs to improve the "time to interact" for the user. The Lightning Usage App (Option B) provides broad metrics on adoption and browser usage across the whole org but does not offer granular, component-level performance analysis for a single record page. Visibility Rules (Option C) are for showing/hiding content, not for technical performance auditing.

NEW QUESTION # 87

Universal Containers wants to implement collaborative selling where multiple roles work together on customer accounts. Sales reps need full access to their assigned accounts, while customer support reps and sales engineers need access to opportunities and cases related to specific accounts they support. The sales manager wants to streamline the process by automatically adding the same team members to multiple accounts. Which feature should a Platform Administrator configure to meet this requirement?

- A. Configure role hierarchy to automatically grant account access to the appropriate teams.
- B. Set up default account teams with specified access levels for different team roles.
- C. Use permission sets to provide additional access to account-related records.

- D. Create sharing rules to grant access to opportunities and cases for support teams.

Answer: B

Explanation:

Account Teams are designed specifically for "collaborative selling," allowing multiple users to work together on a single Account. By using Account Teams, an administrator can define specific roles (e.g., Sales Engineer, Support Rep) and grant them varying levels of access (Read/Write or Read Only) to the Account and its related Opportunities and Case. To meet the manager's requirement of "streamlining" and "automatically adding" members, the administrator should encourage users to set up Default Account Teams. Once a user defines their default team in their personal settings, they can click a single button to add that entire team to any Account they own.

Sharing Rules (Option B) are typically too broad for this requirement because they apply to all records meeting a criteria, rather than specific collaborative groups. The Role Hierarchy (Option C) provides vertical access but doesn't easily handle the horizontal, project-based access required for support reps and engineers working on specific accounts. Permission Sets (Option D) grant functional permissions (what a user can do) but do not grant access to specific data records in a collaborative way.

NEW QUESTION # 88

One of the sales managers at Universal Containers will be going on leave for several months.

The executives want to make sure the sales manager does not log in to Salesforce while on leave. What should a Platform Administrator do to ensure the user is not able to log in while on leave?

- A. Freeze the user's account.
- B. Restrict Login IP Addresses for the profile.
- C. Change the Login Hours for the profile.
- D. Reassign the user's license during leave.

Answer: A

Explanation:

When a user needs to be temporarily prevented from logging in--but their records, role, and historical data need to remain intact--the best practice is to Freeze the user. Freezing an account stops the user from accessing the system immediately without "Deactivating" them. Deactivation can be problematic if the user is a "running user" for dashboards or is part of active hierarchy logic that might break if the account is disabled. Freezing is a simple "one-click" action on the user record. Reassigning the license (Option A) would require deactivating the user first.

Changing login hours (Option B) or IP addresses (Option D) at the profile level would impact all users assigned to that profile, not just the individual manager on leave. Freezing provides a targeted and temporary solution for managing individual user access.

NEW QUESTION # 89

Cloud Kicks wants users to only be able to choose the opportunity stage Closed Won if the Lead source has been selected. How should a Platform Administrator accomplish this goal?

- A. Make Lead source a dependent picklist to the Opportunity Stage field.
- B. Change the Opportunity Stage field to Read Only on the page layout.
- C. Make the opportunity stage a dependent picklist to the Lead source.
- D. Configure a validation rule requiring Lead source when the stage is set to Closed Won.

Answer: D

Explanation:

A Validation Rule is the correct tool for enforcing conditional data entry requirements. When a business rule dictates that a field (Lead Source) must be populated only when another field (Stage) reaches a specific value (Closed Won), a validation rule can evaluate this logic every time a record is saved. The formula would check if the Stage is "Closed Won" and simultaneously check if the Lead Source field is blank. If both conditions are true, the system displays an error message and prevents the user from saving the record. This ensures 100% data compliance. Dependent picklists (Options A and D) are used to filter available options in one list based on the selection of another, but they cannot "require" a value to be present based on a stage change in the same way a validation rule can. Making the stage "Read Only" (Option B) would prevent users from ever winning a deal. Validation rules are the standard method for maintaining data quality during critical transitions in the sales lifecycle.

NEW QUESTION # 90

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