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Salesforce Plat-Admn-201 Exam Syllabus Topics:

Topic	Details
Topic 1	• Agentforce AI: This domain introduces AI-powered agents in Salesforce, covering use cases, configuration in Agent Builder, security considerations, and troubleshooting agent permissions.
Topic 2	• 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 3	• 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 4	• 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.

Salesforce Certified Platform Administrator Sample Questions (Q138-Q143):

NEW QUESTION # 138
A Platform Administrator at Universal Containers needs an automated way to delete records based on field values. Which automated solution should the administrator use?

- A. Flow Orchestration
- B. Mass Delete Records
- C. Flow Builder
- D. Automation Studio

Answer: C

Explanation:
Flow Builder is the standard and most versatile tool for performing automated data maintenance, including the deletion of records. A "Schedule-Triggered Flow" can be configured to run at specific intervals (e.g., daily at midnight) to find records that meet certain criteria-such as Leads that have been "Unqualified" for over a year-and use the "Delete Records" element to remove them from the system. While the "Mass Delete Records" tool (Option C) exists in the Setup menu, it is a manual administrative tool and cannot be scheduled or fully automated based on complex field-level logic. Automation Studio (Option B) is a Marketing Cloud tool, not a core Salesforce platform feature for record management. Flow Orchestration (Option D) is used for complex, multi-user business processes rather than simple data cleanup tasks. Therefore, for recurring, criteria-based record deletion, Flow Builder is the recommended solution.

NEW QUESTION # 139
Which action should a Platform Administrator configure to reverse a submitted approval request and unlock the associated record when setting up an approval process? 99

- A. Final Rejection Actions
- B. Final Approval Actions
- C. Initial Submission Actions
- D. Recall Actions

Answer: D

Explanation:
An Approval Process consists of several stages, each with its own set of automated actions. When a record is first submitted, it is typically locked to prevent further edits. If a user needs to "reverse" that submission-perhaps because they realized they made a mistake or the deal terms changed-the administrator must configure Recall Actions12. A recall action is specifically designed to allow the submitter or an administrator to pull the record back out of the approval queue. Common recall actions include a Field Update to change the status back to "Draft" and, most importantly, an action to unlock the record so it can be edited again. Final Rejection Actions (Option A) occur when an approver denies the request, and Final Approval Actions (Option C) occur when the request is fully granted. Initial Submission Actions (Option D) are what lock the record and start the process in the first place.

NEW QUESTION # 140
Cloud Kicks has three teams of customer service reps that use a custom field on the Case object to populate the team assigned to manage the tickets. The customer support manager would like a Custom Dashboard to show data specific to each team. What should a Platform Administrator do to meet this requirement? 55

- A. Create separate Dashboards for each Customer Support team.
- B. Create a Dashboard that uses Dashboard filters to show specific team data.
- C. Add Cross Filters to switch between the three customer service teams.
- D. Create a Dashboard with widgets specific to each team.

Answer: B

Explanation:
To avoid the administrative burden of creating and maintaining multiple identical dashboards for different teams, a Platform Administrator should use Dashboard Filters. By adding a filter based on the "Team Assigned" custom field, the administrator can create a single dashboard that the manager can toggle between "Team A," "Team B," and "Team C". Each time a filter value is selected, all components on the dashboard that use that field (or a mapped equivalent) will automatically refresh to show the data relevant only to that team. Creating separate dashboards (Option A) is inefficient and leads to "dashboard sprawl". Adding specific widgets for every team on one dashboard (Option B) would result in a cluttered and confusing interface61. Cross Filters (Option D) are a reporting feature used to filter records based on their relationship to other objects, not a dashboard-level viewing tool.

NEW QUESTION # 141
Users at DreamHouse Realty are only allowed to see opportunities they own. Leadership wants an enterprise-wide dashboard of all open opportunities in the pipeline so that users can see how the company is performing at any point in time. How should a Platform Administrator create the dashboard without changing any sharing settings?

- A. Update the dashboard folder settings to manager for the sales reps role.
- B. Create a dashboard with the running user set as someone who can see all opportunities.
- C. Build individual dashboards for profiles that need to see the enterprise results.
- D. Add a filter to the dashboard to filter the opportunities by owner role.

Answer: B

Explanation:
In Salesforce, dashboards can be configured to run as a specific user, known as the Running User. This user's security settings determine which data is visible to anyone viewing the dashboard. To allow users with restricted record access (due to a Private sharing model) to see company-wide totals, the Platform Administrator should set the dashboard to "Run as a specified user" who has "View All" permissions or is high enough in the role hierarchy to see all records. This creates a "Static Dashboard." While the viewers cannot click into individual records they don't own, they can see the summarized totals and charts for the entire organization. Using a Dynamic Dashboard or filtering by role (Option B) would still respect individual sharing and hide data. Changing folder settings (Option D) only affects who can open the dashboard, not the data displayed within it.

NEW QUESTION # 142
A sales manager at DreamHouse Realty wants sales users to have a quick way to view and update the opportunities in their pipeline expected to close in the next 90 days. What should a Platform Administrator do to accomplish this request?

- A. Make a new Sales dashboard and add a component that shows all opportunities that meet the criteria.
- B. Create a custom report and schedule the sales users to receive it each day as a reminder to update their opportunities.
- C. Enable Sales Console and show users how to open a tab for each opportunity in the pipeline that meets the requirements.
- D. Create a list view on the Opportunity object and recommend users switch the view to Kanban to edit by drag and drop.

Answer: D

Explanation:
To provide both a "quick view" and a way to "update" records efficiently, a List View combined with the Kanban view is the most effective solution. The Platform Administrator can create a public list view with the filter "Close Date equals NEXT 90 DAYS." By switching this list view to the Kanban display, sales reps can see their deals organized by stage. The Kanban view allows for rapid updates via drag-and-drop, which automatically changes the Stage field, and provides side-panel editing for other key fields. While reports (Option A) and dashboards (Option B) are good for visualization, they are not optimized for the rapid, bulk record updates the manager is requesting. The Kanban view is a native productivity feature designed specifically to streamline pipeline management for sales users.

NEW QUESTION # 143
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