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Salesforce Plat-Admn-201 Exam Syllabus Topics:

Topic	Details
Topic 1	<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 2	<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 3	<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 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.

Salesforce Certified Platform Administrator Sample Questions (Q33-Q38):

NEW QUESTION # 33

At Cloud Kicks, cases are being assigned a default Case Owner and showing a Created By and Last Modified By that is not expected. The company wants to change this to an integration user to alleviate confusion with the business. What should a Platform Administrator edit to change this in Salesforce?

- A. Debug Logs
- B. Support Processes
- **C. Support Settings**
- D. Process Automation Settings

Answer: C

Explanation:

In Salesforce, Support Settings is the primary configuration page for determining how the Service Cloud handles automated case updates. This section allows a Platform Administrator to define the "Default Case Owner" and the "Automated Case User." The Automated Case User is the user listed in the Case History for automated actions, such as those triggered by assignment rules, escalation rules, or Email-to-Case. If the business sees an "unexpected" user name in the Created By or Last Modified By fields during these automated processes, it is usually because this setting is pointing to a specific administrator or a system user. By updating the Automated Case User to a dedicated "Integration User," the admin ensures that the audit trail clearly distinguishes between manual edits made by staff and automated updates made by the system. This provides better clarity for the support team and prevents confusion regarding who is responsible for specific record changes.

NEW QUESTION # 34

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

Answer: A,C

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 # 35

Northern Trail Outfitters has the Case object set to private. The support manager raised a concern that reps have a broader view of data than expected and can see all cases on their group's dashboards. What is causing reps to have inappropriate access to data on dashboards?

- A. Dashboard Subscriptions
- B. Dashboard Filters
- C. Public Dashboards
- D. Dashboard's running user

Answer: D

Explanation:

In Salesforce, a dashboard's running user determines which data is displayed to anyone viewing the dashboard. If a dashboard is configured with a "Static" running user (e.g., a Support Manager who has "View All" permissions), every user who views that dashboard will see the manager's level of data, regardless of their own personal sharing permissions. This bypasses the Organization-Wide Default (OWD) of "Private" for the Case object. When the support manager observes that reps can see all cases on a group dashboard, it is almost certainly because the dashboard is "running" as a user with high-level access. To correct this and ensure users only see data they are entitled to, the Platform Administrator should convert it into a Dynamic Dashboard. A dynamic dashboard is set to "Run as the logged-in user," meaning the data reflected in the components will automatically filter based on the individual viewer's specific sharing rules and record ownership. This ensures that the dashboard remains a useful tool for the team while strictly adhering to the company's data privacy and security requirements.

NEW QUESTION # 36

A VP of sales needs to report on records owned by individuals in various parts of the role hierarchy. The organization-wide default is set to Private. What should a Platform Administrator configure to achieve this?

- A. Sharing Rules
- B. Restriction Rules
- C. Field-Level Security
- D. Permission Sets

Answer: A

Explanation:

When the Organization-Wide Default (OWD) for an object is set to Private, users can only see records they own or those shared with them. While the Role Hierarchy automatically grants "upward" visibility (managers see what subordinates own), it does not naturally allow for "lateral" visibility or visibility across different branches of the hierarchy. To solve this, a Platform Administrator should use Sharing Rules. Sharing Rules allow the admin to create exceptions to the Private OWD based on record ownership or specific criteria. For example, the admin can create an "Owner-based Sharing Rule" that shares all records owned by the "East Coast Sales" role with the VP of Sales (or a Public Group the VP belongs to). This provides a scalable way to grant the necessary visibility for reporting without making the data public to the entire company. Sharing Rules are a core security feature that ensures the right people have access to the right data while maintaining the principle of least privilege.

NEW QUESTION # 37

An agent is being developed with several actions that all retrieve information from different databases. A Platform Administrator has named the actions as follows: GetCustomerInfo, GetOrderDetails, GetShippingStatus. Which best practice should the administrator follow to improve these names?

- Answer: B**

When naming actions for an AI agent, consistency is key to helping the Large Language Model (LLM) categorize and understand the available tools. Following a consistent naming convention, such as starting all retrieval actions with the verb "Get," allows the agent to more easily map user intent (e.g., "I need information about...") to the appropriate action. This reduces ambiguity during the reasoning phase of the agentic loop. Using inconsistent verbs like Find, Retrieve, or Identify (Option D) can confuse the model regarding which action is most appropriate for a given task. Removing verbs entirely (Option A) makes it harder for the model to distinguish between an action (doing something) and a data object (a thing). Adding "Salesforce" (Option B) is generally redundant as the agent's context is already within the Salesforce environment.

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