

# Salesforce Plat-Admn-201 study guide



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## Salesforce Plat-Admn-201 Exam Syllabus Topics:

| Topic   | Details  |
|---------|--|
| Topic 1 | <ul style="list-style-type: none"><li>• 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.</li></ul> |
| Topic 2 | <ul style="list-style-type: none"><li>• 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.</li></ul>   |
| Topic 3 | <ul style="list-style-type: none"><li>• 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.</li></ul>                         |
| Topic 4 | <ul style="list-style-type: none"><li>• 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.</li></ul>     |
| Topic 5 | <ul style="list-style-type: none"><li>• Productivity and Collaboration: This domain addresses activity management, Chatter collaboration, Salesforce mobile app customization, and AppExchange applications including managed and unmanaged packages.</li></ul>  |
| Topic 6 | <ul style="list-style-type: none"><li>• Agentforce AI: This domain introduces AI-powered agents in Salesforce, covering use cases, configuration in Agent Builder, security considerations, and troubleshooting agent permissions.</li></ul>   |

## Exam Plat-Admn-201 Questions Fee | Valid Real Plat-Admn-201 Exam

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## Salesforce Certified Platform Administrator Sample Questions (Q128-Q133):

### NEW QUESTION # 128

Ursa Major Solar wants to roll out the Salesforce mobile app, and the first information it wants its users to see is the Top Opportunities report. What should a Platform Administrator configure to achieve this?

- A. Enable Mobile Home for the Salesforce mobile app.
- B. Add the Dashboards tab to the Salesforce mobile app.
- C. Add the Reports tab to the Salesforce mobile app.
- D. Enable Today for the Salesforce mobile app.

**Answer: A**

Explanation:

Mobile Home is a customizable landing page for the Salesforce mobile app that acts as the default "start page" for users. It allows administrators to add various "cards" or "widgets," including reports, pinned records, and upcoming events. By enabling and configuring Mobile Home, a Platform Administrator can place a specific Report card (such as "Top Opportunities") at the very top of the screen, ensuring it is the first thing users see upon opening the app. While adding the Reports tab (Option A) or Dashboards tab (Option D) allows users to find the information, it does not automatically present specific report data on the home screen. The "Today" feature (Option B) focuses on calendar events and tasks rather than customized reporting data.

### NEW QUESTION # 129

A Platform Administrator at Cloud Kicks has a custom picklist field on Lead, which is missing on the Contact when leads are converted. Which two steps should the administrator take to ensure these values are populated?

- A. Map the picklist field on the Lead to the Contact.
- B. Create a custom picklist field on Contact.
- C. Update the picklist value with a validation rule.
- D. Set the picklist field to be required on the Lead object.

**Answer: A,B**

Explanation:

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When a Lead is converted into an Account, Contact, and Opportunity, standard fields are mapped automatically. However, custom fields require manual configuration to ensure data flows through the conversion process. First, the Platform Administrator must create a corresponding custom picklist field on the Contact object (Option B) with the same values as the Lead field. Second, the administrator must go to the Lead Object Manager, select "Fields & Relationships," and click Map Lead Fields (Option C). Here, the admin explicitly maps the Lead custom picklist to the newly created Contact custom picklist. Without this mapping, the data will be lost during conversion. Validation rules (Option A) and making the field required (Option D) ensure data exists on the Lead but do not facilitate the transfer of that data to the Contact.

### NEW QUESTION # 130

Cloud Kicks wants Agentforce to adapt its behavior based on real-time customer input. Which feature directly enables this capability? 1

- A. Tableau
- **B. Custom actions**
- C. Data Cloud
- D. Screen flow

**Answer: B**

Explanation:

Agentforce is built to be dynamic, meaning it doesn't just follow a static script but rather "reasons" through a problem using an agentic loop. The feature that directly allows an agent to adapt its behavior and take specific, real-time steps based on customer input is Custom Actions<sup>3</sup>. When a customer provides information-such as a specific order number or a request to change an address-the agent identifies the user's intent and selects the most relevant action to execute<sup>4</sup>. These actions can be powered by Flows, Apex, or Prompt Templates, giving the agent the ability to interact with Salesforce data in real-time. While Data Cloud (Option A) provides the data foundation for grounding, it is the actions themselves that define the agent's behavioral capabilities<sup>6</sup>. Screen flows (Option C) provide a guided UI for humans, but custom actions are what allow the agent to function autonomously<sup>7</sup>. Tableau (Option D) is an analytics tool and does not drive real-time agent behavior<sup>8</sup>.

### NEW QUESTION # 131

What is an Agentforce use case in a sales organization?

- **A. Automating Lead Qualification**
- B. Automating all marketing content
- C. Providing basic web bot chats
- D. Generating cold calls

**Answer: A**

Explanation:

Agentforce is designed to handle sophisticated, multi-step business processes that traditionally require human intervention. In a sales organization, a primary use case is Automating Lead Qualification. Unlike basic web bots (Option C) that follow a rigid, pre-defined script, an Agentforce agent can engage in natural language conversations with prospects. It can ask relevant discovery questions, handle objections, and determine if a lead meets the company's "Qualified" criteria based on the information provided. Once qualified, the agent can autonomously update the Salesforce record or even book a meeting for a human sales representative. While AI can assist with content, "automating all marketing content" (Option B) is overly broad and typically handled by specialized marketing tools. Generating cold calls (Option A) involves voice technology and legal complexities that are not the core focus of the Agentforce platform's digital agent capabilities. Lead qualification represents a high-value, repeatable process that perfectly leverages the agent's ability to reason and interact with Salesforce data.

### NEW QUESTION # 132

Users at Cloud Kicks are reporting different options when updating a custom picklist on the Opportunity object based on the kind of opportunity. Where should a Platform Administrator update the option in the picklist?

- A. Related lookup filters
- B. Picklist value sets
- C. Fields and relationships
- **D. Record type**

**Answer: D**

Explanation:

When a single picklist field needs to show different values to different users or for different business contexts, Record Types are the configuration point. While the master list of all possible values is defined in "Fields and Relationships" (Option D) or a "Global Value Set" (Option C), the Record Type determines which of those values are "available" for a specific type of record. For example, a "Wholesale" record type might show different discount levels than a "Retail" record type. If users are seeing inconsistent or incorrect options, the Platform Administrator must go to the specific Record Type settings for the Opportunity object, find the picklist in

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