

# Exam Plat-Admn-201 Questions Answers - Plat-Admn-201 Test Simulator Fee



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

Topic	Details
Topic 1	<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 2	<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>
Topic 3	<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 4	<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 5	<ul style="list-style-type: none"><li>• 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.</li></ul>
Topic 6	<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 7	<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>
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## >> Exam Plat-Admn-201 Questions Answers <<

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### Salesforce Certified Platform Administrator Sample Questions (Q65-Q70):

#### NEW QUESTION # 65

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?

- A. Use additional related verbs, such as Find, Retrieve, or Identify.
- B. Add the word "Salesforce" to the beginning of each action name to improve context for the large language model.
- **C. Use a consistent naming convention by starting each action with the verb "Get".**
- D. Remove all verbs and use only nouns, such as CustomerInfo, OrderDetails, and ShippingStatus.

**Answer: C**

Explanation:

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.

#### NEW QUESTION # 66

A Platform Administrator at Cloud Kicks is trying to set up a new user but receives an error about a duplicate username when trying to save the user record. What is causing this error to happen?

- A. The email address and username must be unique across all Salesforce orgs.
- B. The username has a restricted domain name within it.
- **C. The username must be unique across all Salesforce orgs.**
- D. The username was not configured in the format of an email address.

**Answer: C**

Explanation:

In the Salesforce architecture, the Username is a globally unique identifier<sup>49</sup><sup>49</sup>. This means that once a username (e.g., admin@cloudkicks.com) is used in any Salesforce organization (including production, sandboxes, and developer editions), it cannot be used again in any other organization worldwide. This often causes confusion because while an Email Address can be reused across multiple Salesforce users and orgs, the Username must remain distinct<sup>51</sup>. If an administrator receives a duplicate username error, it means the desired username is already taken by a user in another instance of Salesforce. <sup>54</sup>Option A is incorrect because usernames must be in email format, but they don't have to be a valid functioning email. Option B is incorrect because only the username has this global uniqueness requirement, not the email address.

#### NEW QUESTION # 67

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. Existing field values will be deleted.
- B. Changing Auto Number field to Text is prevented.
- **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 strings<sup>12</sup>. 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 records<sup>14</sup>. 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 # 68

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

**Answer: C**

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 # 69

How should a Platform Administrator provide users with individualized views of data on a dashboard?

- **A. Create a Dynamic Dashboard.**
- B. Add a Dashboard Filter to change the dashboard view.
- C. Set View Dashboard As to Me.
- D. Set View Dashboard As to Another person.

**Answer: A**

Explanation:

A Dynamic Dashboard is a specific type of dashboard where the data displayed changes based on which user is currently viewing it. By setting the "View Dashboard As" property to "The logged-in user," the dashboard components will respect each individual user's sharing settings, role hierarchy, and record ownership. For example, if a sales rep views a dynamic dashboard, they might only see their own \$100k pipeline, while their manager viewing the same dashboard would see the team's combined \$1M pipeline. This eliminates the need for an administrator to create and maintain dozens of identical dashboards for different individuals. Dashboard Filters (Option A) allow users to narrow down data but do not change the fundamental "running user" security context. Setting the

dashboard to run as "Me" (the admin) or "Another person" (Options C and D) creates a static view where everyone sees the same data, which is the opposite of providing an individualized view.

## NEW QUESTION # 70

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