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## Exam Questions 201

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

Topic	Details
Topic 1	<ul style="list-style-type: none"><li>• <b>Data and Analytics Management:</b> 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>• <b>Service and Support Applications:</b> 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>• <b>Object Manager and Lightning App Builder:</b> 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>• <b>Configuration and Setup:</b> 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 5	<ul style="list-style-type: none"><li>• <b>Productivity and Collaboration:</b> 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>• <b>Sales and Marketing Applications:</b> 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>

## Salesforce Certified Platform Administrator Sample Questions (Q57-Q62):

### NEW QUESTION # 57

Sales managers would like to know what could be implemented to surface important values based on the stage of the opportunity? Which tool should a Platform Administrator use to meet this requirement?

- A. Opportunity Processes
- **B. Path Key Fields**
- C. Dynamic Forms
- D. Workflow Rules

**Answer: B**

Explanation:

The Opportunity Path is a visual tool that guides sales reps through the stages of a sales cycle. One of its most powerful features for administrators is the ability to define Key Fields for each individual stage. For example, when an opportunity is in the "Discovery" stage, the administrator can choose to display fields like "Budget" and "Decision Maker." When the deal moves to "Negotiation," the Path can be configured to surface "Contract Terms" and "Discount Percentage." This ensures that reps are prompted to enter and review the most relevant data at exactly the right time in the process. While Dynamic Forms (Option D) can show or hide fields on the main record page, the Path specifically organizes this information at the top of the record in a way that is directly tied to the sales methodology. Workflow Rules (Option A) are a legacy automation tool that cannot modify the user interface. Path Key Fields empower sales teams to maintain focus and data accuracy throughout the deal lifecycle.

### NEW QUESTION # 58

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?

- A. Lightning Usage App
- **B. Lightning Analytics**

- C. Lightning Page Visibility Rule
- **D. Lightning App Builder Analytics**

**Answer: D**

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 # 59

A sales rep has left the company, and a Platform Administrator has been asked to re-assign all their accounts and opportunities to a new sales rep and keep the team as is. Which tool should the administrator use to accomplish this?

- A. Dataloader.io
- B. Data Loader
- **C. Mass Transfer Records**
- D. Data Import Wizard

**Answer: C**

Explanation:

The Mass Transfer Records tool is a built-in Salesforce feature designed specifically for the scenario of a person leaving the company or changing roles. It allows a Platform Administrator to select a "From" user and a "To" user and then choose specific record types to transfer, such as Accounts and Opportunities. A major advantage of this tool is that it gives the administrator the option to transfer related records (like open opportunities or cases) and keep existing teams (like Account Teams) intact during the move. While Data Loader (Option A) or Dataloader.io (Option B) could technically perform a bulk update of the "OwnerId" field, they require several steps, including exporting data, manipulating CSV files, and re-uploading. The Data Import Wizard (Option D) is primarily for creating or updating records from an external file and does not have a dedicated "transfer" function. Mass Transfer is the fastest and safest standard way to reassign ownership within the Setup menu.

#### NEW QUESTION # 60

The Cloud Kicks sales team has asked that two of the fields that appear on the Opportunity cards in Kanban view be changed to make the cards more meaningful. Which feature should a Platform Administrator access to make this change?

- **A. Compact Layout**
- B. Kanban Settings
- C. Page Layout
- D. Record Type

**Answer: A**

Explanation:

In the Salesforce Lightning Experience, the fields displayed in the "header" of a record and on the cards in the Kanban view are controlled by the Compact Layout. Each object has a System Default compact layout, but a Platform Administrator can create custom ones to prioritize the most important information, such as "Account Name" and "Close Date." By editing the primary compact layout for the Opportunity object, the admin directly controls which fields the sales team sees as they drag and drop deals through the Kanban stages. While Page Layouts (Option C) control the main record detail page and Kanban Settings (Option D) control which field is used for columns and summaries, the individual "card" content is always driven by the Compact Layout. This ensures that users can quickly gather key context without needing to open every individual record.

#### NEW QUESTION # 61

A Platform Administrator at Ursa Major Solar wants to add prepopulated subjects for Tasks and Events. Tasks should have the

subjects "Schedule Site Visit" and "Send Contract", while Events should have the subjects "Site Visit" and "Ride Along". What should the administrator configure to achieve this requirement?

- A. Include Schedule Site Visit, Send Contract, Site Visit, and Ride Along picklist values for the Activity subject field.
- **B. Add Schedule Site Visit and Send Contract picklist values for the Task subject field. Add Site Visit and Ride Along picklist values for the Event subject field.**
- C. Create a new custom Subject picklist field on Activity and add the field values.
- D. Add the new values to the predefined field values for the global actions New Event and New Task.

**Answer: B**

Explanation:

Tasks and Events are both part of the Activity object, but they often require different picklist values for the standard Subject field. To achieve this, the Platform Administrator must manage the picklist values for the Subject field specifically for each record type or activity type. In the Object Manager, under the Activity object (or Task/Event objects individually in some setups), the admin should edit the Subject field. Because Task and Event are distinct entities with their own picklist value sets for the Subject field, the admin can add "Schedule Site Visit" and "Send Contract" to the Task Subject list and "Site Visit" and "Ride Along" to the Event Subject list. This ensures that when a user creates a Task, they only see task-related subjects, and when they create an Event, they see event-related subjects. Option D is incorrect because it would mix all values together, causing confusion for the users. Option A (Predefined Field Values) is used to set a single default value for a field when an action is clicked, but it does not manage the available list of options in a picklist.

## NEW QUESTION # 62

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