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Salesforce Plat-Admn-201 Exam Syllabus Topics:

Topic	Details
Topic 1	• 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.
Topic 2	• 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	• Agentforce AI: This domain introduces AI-powered agents in Salesforce, covering use cases, configuration in Agent Builder, security considerations, and troubleshooting agent permissions.
Topic 4	• Productivity and Collaboration: This domain addresses activity management, Chatter collaboration, Salesforce mobile app customization, and AppExchange applications including managed and unmanaged packages.
Topic 5	• Automation: This domain covers automation tools for streamlining business processes, including assignment and escalation rules, Flow configuration for various scenarios, and approval process setup.

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Salesforce Certified Platform Administrator Sample Questions (Q26-Q31):

NEW QUESTION # 26
Universal Containers (UC) has a private sharing model for Opportunities and uses Opportunity teams. Criteria-based sharing rules are not used. A sales rep at UC leaves the company, and their user record is deactivated. The rep is later rehired in the same role. A Platform Administrator activates the old user record. The user is added to the same default Opportunity teams but is no longer able to see the same records the user worked on before leaving the company. What is the likely cause?

- A. Permission sets were removed when the user was deactivated.
- B. The record type of the opportunity records was changed.
- C. The stage of the opportunity records was changed to Closed Lost.
- D. The records were manually shared with the user.

Answer: D

Explanation:
In Salesforce, there are different types of sharing: Managed Sharing (Role Hierarchy, Sharing Rules) and Manual Sharing. A critical behavior of the platform is that when a user is deactivated, all their Manual Shares (records shared with them by other users using the "Share" button) are automatically and permanently deleted from the system. Even if the user record is reactivated later, those manual shares do not return. Because the organization uses a "Private" model and does not use criteria-based sharing rules, the user's previous access likely relied on manual sharing or their previous position in the hierarchy. While activating the record and adding them back to teams provides new access, the historical "one-off" shares are gone. Options A and B are unlikely to be the cause of a total loss of visibility. Option D is incorrect because permission sets control what a user can do, not which specific records they can see in a private sharing model.

NEW QUESTION # 27
Universal Containers has two sales teams, sales team A and sales team B. Each team has their own role in the role hierarchy. Both roles are subordinates of the same Manager role. How should a Platform Administrator share records owned by sales team A with sales team B?

- A. Hierarchical sharing
- B. Criteria-based sharing
- C. Owner-based sharing
- D. Manual sharing

Answer: C

Explanation:
In this scenario, the two teams are "peers" in the role hierarchy (both reporting to the same manager). In a private sharing model, peers cannot see each other's records by default. To grant lateral access between these specific groups, an Owner-based Sharing Rule is the most effective solution. The administrator can create a rule stating that any records owned by members of "Role: Sales Team A" should be shared with members of "Role: Sales Team B" with specific access levels (e.g., Read/Write). Hierarchical sharing (Option C) only grants upward visibility to the Manager role, not across to the other team34. Manual sharing (Option D) is

inefficient for an entire team35. Criteria-based sharing (Option A) is used when record field values determine access, whereas this requirement is based specifically on who owns the records36.

NEW QUESTION # 28
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. Create a custom report and schedule the sales users to receive it each day as a reminder to update their opportunities.
- B. Create a list view on the Opportunity object and recommend users switch the view to Kanban to edit by drag and drop.
- C. Make a new Sales dashboard and add a component that shows all opportunities that meet the criteria.
- D. Enable Sales Console and show users how to open a tab for each opportunity in the pipeline that meets the requirements.

Answer: B

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 # 29
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's running user
- C. Dashboard Filters
- D. Public Dashboards

Answer: B

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 # 30
Universal Containers wants to track all stakeholders involved in its sales opportunities to ensure proper relationship management. Sales reps need to identify who has decision-making authority, who influences the buying process, and who serves as the primary contact for each deal. Which feature should a Platform Administrator configure to meet this requirement?

- A. Use contact roles on opportunities to identify stakeholder involvement and influence.
- B. Set up account teams to track stakeholders across multiple opportunities.
- C. Use standard fields on opportunities to track stakeholder information.
- D. Configure opportunity team members to track internal and external stakeholders.

Answer: A

Explanation:
Opportunity Contact Roles allow sales reps to link multiple Contacts to a single Opportunity and assign a specific "Role" to each, such as "Decision Maker," "Influencer," or "Economic Buyer." This provides the visibility needed to understand the "buying committee" for a deal. It also allows for the designation of a "Primary Contact." Opportunity Teams (Option A) are used to track internal staff working the deal. Account Teams (Option B) track collaboration at the account level but are not deal-specific. Standard fields (Option C) are insufficient for tracking a "one-to-many" relationship between an opportunity and multiple contacts with unique roles. Contact Roles are the standard feature designed exactly for stakeholder management in the sales process.

NEW QUESTION # 31
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