Vendor: Salesforce

Exam Code: Plat-Admn-201

Exam Name: Salesforce Certified Platform Administrator

Version: DEMO

QUESTION 1

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

Answer: C
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.

QUESTION 2
Cloud Kicks uses the standard Account Type field to indicate different account tiers. Users find this confusing, so management has asked that the field be changed to read "Tier" on the page layouts. How should a Platform Administrator implement this change?

A. Edit the Type field and change the name.
B. Use Rename Tabs and Labels.
C. Build a custom field called Tier and delete Type.
D. Create a global picklist value set.

Answer: B
Explanation:
To change the display name of a standard field (like "Account Type") globally across the entire organization, the correct tool is Rename Tabs and Labels in the Setup menu. This tool allows an administrator to modify the singular and plural labels for standard objects and the field labels for their standard fields. By renaming "Type" to "Tier," the change will be reflected on page layouts, in report column headers, and in list views. This is the preferred method because it preserves the underlying data and logic associated with the standard field. Option A is incorrect because standard field names cannot be edited in the "Fields and Relationships" menu. Option C is a destructive and complex process that would require data migration and could break existing reports or integrations. Option D does not address the label of the field itself.

QUESTION 3
A Platform Administrator is building an agent to nurture leads. How does Agentforce SDR help?

A. Generate a dynamic call script and talking points for the human sales reps to use.
B. Autonomously negotiate pricing with the lead and close the final deal.
C. Analyze the performance of human sales reps and provide coaching tips.
D. Answer the lead's questions with responses that are grounded in company data.

Answer: D
Explanation:
Agentforce SDR (Sales Development Representative) is an AI agent designed to autonomously engage with prospects to nurture leads and accelerate the sales pipeline. A core functionality of this agent is its ability to interact with potential customers by answering their specific questions about products or services. Crucially, these responses are grounded in company data, meaning the agent retrieves relevant information from the Salesforce Knowledge base, product catalogs, or other internal resources to provide accurate, brand-aligned answers. This ensures that the agent provides high-quality, trustworthy information without the "hallucinations" common in non-grounded AI. While the agent helps in lead qualification and nurturing, its primary value in an ecommerce or sales support context is providing immediate, context-aware assistance. It is not intended to replace humans in complex price negotiations (Option B) or serve purely as a coaching tool (Option C), but rather to act as a front-line digital worker that scales the sales team's reach by handling information-seeking queries autonomously.

QUESTION 4
Universal Containers' Platform Administrator has been asked to create a many-to-many relationship between two existing custom objects. Which two steps should the administrator take when enabling the many-to-many relationship?

A. Create a junction with a custom object.
B. Create two master-detail relationships on the new object.
C. Create URL fields on a custom object.
D. Create two lookup relationships on the new object.

Answer: AB
Explanation:
In Salesforce, a many-to-many relationship allows each record of one object to be linked to multiple records of another object and vice versa. This is achieved by using a Junction Object. A junction object is a custom object that sits between the two objects you want to relate. To implement this correctly, the administrator must follow two specific steps: first, create the custom object to serve as the "junction"; second, create two Master-Detail relationship fields on that new junction object. One master-detail field points to the first custom object, and the second points to the other. Because these are master-detail relationships, the junction record's visibility and deletion behavior are controlled by its parents. This structure allows for powerful reporting and roll-up summaries on both parent objects. Using simple lookup relationships (Option D) would not enforce the strict data integrity or the specific roll-up capabilities that define a true many-to-many relationship in the Salesforce architecture.

QUESTION 5
A Platform Administrator at Universal Containers has a screen flow that helps users create new leads. When Lead Source is "Search Engine", the administrator needs to require the user to choose a specific search engine from a picklist. If Lead Source is not "Search Engine", this picklist should be hidden. What is the most efficient way for the administrator to complete this requirement?

A. Use a conditional filter in the screen element to only show the Specific Search Engine field only when Lead Source is "Search Engine".

B. Use Assignment elements; one for when Lead Source is "Search Engine" and one for everything else.
C. Create a picklist for Specific Search Engine, and set conditional visibility so that it is only shown when Lead Source is "Search Engine".
D. Configure a picklist for Specific Search Engine, and use a validation rule to conditionally show only when Lead Source is "Search Engine".

Answer: C
Explanation:
In Flow Builder, the most efficient and user-friendly way to handle dynamic user interfaces is through Component Visibility. This feature allows an administrator to set logic on individual screen components (like a picklist) so they only appear when specific criteria are met. In this scenario, the administrator would select the "Specific Search Engine" picklist component within the Flow Screen and configure its visibility to show only when the "Lead Source" screen component equals "Search Engine." This provides a "clean" user experience where the form adapts in real-time to the user's input without requiring the user to navigate to a new screen or trigger a validation error. Validation rules (Option D) are reactive and only tell the user they made a mistake after they try to save, whereas conditional visibility is proactive. Option B is inefficient as it would require multiple screens and complex branching logic, whereas component visibility handles everything within a single screen element.

QUESTION 6
The Activity Timeline is missing from the Account record page. What should a Platform Administrator do to correct this?

A. Add the standard Activities component to the Account Lightning record page.
B. Update the user's permission to allow Edit access to the Activity Timeline.
C. Run a report to verify whether any activities have been logged for that Account.
D. Add a button for the Activity Timeline in the Object Manager for the Account object.

Answer: A
Explanation:
The Activity Timeline is a standard Lightning component that displays open tasks, upcoming events, and past activities (like logged calls or sent emails) in a chronological view. If this timeline is missing from an Account page, it is usually because the component has been removed from the Lightning Record Page layout. To fix this, the Platform Administrator should open the Account record in the Lightning App Builder. From the list of standard components on the left, the admin must drag the Activities component onto the page canvas--typically in the right-hand column or a dedicated tab. Once the page is saved and activated, the timeline will be visible to users. Visibility of the timeline is a layout configuration, not a specific "Edit access" permission (Option B). Running a report (Option C) might confirm if data exists, but it won't fix the UI issue. There is no "button" for the Activity Timeline in the Object Manager (Option D); it is managed strictly as a component within the App Builder.

QUESTION 7
A Platform Administrator wants to limit the kinds of reports their users can create. Which tool should the administrator use?

A. Hide Report Types
B. Report Folder Sharing
C. Standard Report Types

D. Joined Report

Answer: A
Explanation:
When users click the "New Report" button, they are presented with a list of Report Types, which act as templates determining which objects and fields are available for the report. Often, an org has many standard report types that are irrelevant or confusing to the average user. To "limit the kinds of reports" and simplify the user experience, a Platform Administrator can use the Select Report Types to Hide feature in the Report and Dashboard Settings. By hiding unnecessary or redundant report types, the admin ensures that users only see the specific templates that align with company reporting standards. This reduces the risk of users creating inaccurate reports using the wrong data models. Report Folder Sharing (Option B) controls who can view or edit existing reports, but it does not restrict the creation of new ones from specific templates. While creating Custom Report Types is a way to define what data is available, the specific act of "limiting" the visible list is handled by the "Hide" functionality.

QUESTION 8
Agentforce is escalating cases to the support team, but the support team complains they have no context and have to ask the customer to repeat everything. Which configuration issue is the most likely cause of this issue?

A. The support team members are missing the Agentforce User permission set.
B. The support team's case page layout is missing the agent history component.
C. The agent's instructions are preventing the history and context from being saved.
D. The handoff is creating a new case instead of transferring the existing session.

Answer: B
Explanation:
When an AI agent like Agentforce transfers a conversation to a human support representative, the goal is a "warm handoff" where the rep can see exactly what the customer and the AI discussed. If reps are complaining about a lack of context, the most common administrative cause is that the Conversation History component (or Agent History component) has not been added to the Case Lightning Record Page. Without this component on their page layout, the rep sees the newly assigned case but cannot see the transcript of the preceding chat session. To resolve this, the Platform Administrator should use the Lightning App Builder to add the relevant history component to the Case page used by the support team. Option D is less likely if escalation is working but context is missing. Option A would prevent users from using Agentforce features but wouldn't specifically hide the transcript of a finished AI interaction. Ensuring the UI includes the conversation history is critical for maintaining high customer satisfaction during handoffs.

QUESTION 9
A Platform Administrator creates a custom text area field on the Account object and adds it to the service team's page layout. The service team manager loves the addition of this field and wants it to appear in the highlights panel so that the service reps can quickly find it when on the Account page. How should the administrator accomplish this?

A. In the Account object manager, create a custom compact layout.
B. Make the field required and move it to the top of the page.
C. Create a new page layout and a new section titled highlights panel.
D. From the page layout editor, drag the field to the highlights panel.

Answer: A
Explanation:
In the Salesforce Lightning Experience, the Highlights Panel at the top of a record page is controlled by the Compact Layout. The compact layout determines which fields (up to 7) appear in the record header and in the hover-over details. To add a new custom field to this area, the Platform Administrator must go to the Object Manager for Accounts, select Compact Layouts, and either edit the existing primary layout or create a new custom one. After adding the custom text area field to the "Selected Fields" list and saving, the field will immediately appear in the Highlights Panel for users. It is a common misconception that the standard Page Layout editor (Option D) controls the highlights panel; while the page layout controls the "Details" section and "Related Lists," it does not manage the header area. Option B might make the field easier to find in the details section but will not place it in the highlights panel.

QUESTION 10
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. Add the new values to the predefined field values for the global actions New Event and New Task.
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. Include Schedule Site Visit, Send Contract, Site Visit, and Ride Along picklist values for the Activity subject field.

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.

QUESTION 11
Ursa Major Solar's Platform Administrator is editing the page layout for a new custom object. A text area field is accidentally removed from the page layout, and it needs to be restored to the page layout. What are two methods for achieving this goal?

A. Clone the layout from a different profile and use save as.
B. Restore original page layout from a sandbox.
C. Restore from the recycle bin within 15 days.
D. From the fields palette, drag the field into the same position.

Answer: BD

Explanation:
When a field is removed from a page layout, the field itself is not deleted from the database; it is simply no longer displayed to the user. To restore it, the most direct method is to use the Page Layout Editor, find the field in the Fields Palette at the top of the editor, and drag it back onto the layout (Option D). This is the standard "undo" action for layout changes. Alternatively, if the layout has undergone many complex changes and the admin wants to revert to a known good state, they could restore it from a Sandbox (Option B) by redeploying the layout metadata. Option C is incorrect because the Recycle Bin is for deleted records or fields, not for layout configurations. Option A is a workaround that involves creating a new layout based on another, but it is not a direct way to "restore" the specific layout being edited.

QUESTION 12
A Platform Administrator at Cloud Kicks would like to use Salesforce to start tracking details around its marketing efforts. They would like to track details around emails, trade shows, and webinars. Additionally, each of these initiatives will need to track different types of information. How should the administrator accomplish this?

A. Create a custom report type with relevant fields.
B. Create a custom field on the Campaign object for the type of initiative.
C. Create record types and page layouts for each type of campaign.
D. Use campaign hierarchies to organize campaign types.

Answer: C
Explanation:
When a single object like Campaigns needs to support different "types" of marketing initiatives that require different fields or picklist values, the correct architectural solution is to use Record Types and Page Layouts. By creating distinct record types for "Email," "Trade Show," and "Webinar," the Platform Administrator can assign a unique Page Layout to each. For example, the Trade Show layout might include fields for "Booth Number" and "Travel Costs," while the Webinar layout might include "Webinar URL" and "Platform Provider." This ensures that users only see the fields that are relevant to the specific type of campaign they are running, improving data quality and the user experience. While adding a custom field (Option B) would allow for categorization, it wouldn't hide irrelevant fields for different initiatives. Campaign Hierarchies (Option D) are used for relating parent and child campaigns but do not manage the specific data entry requirements for different initiative types.

QUESTION 13
A Platform Administrator created a new prompt template and is testing it. Every time the administrator tests the template, it gives a different response. Why is the prompt template giving different responses each time it's run?

A. Prompt Builder caches the large language model's response, so the prompt is only sent once for every template the administrator creates.
B. Every time the administrator runs a prompt template in Prompt Builder, it creates a unique call to the large language model.
C. The prompt is only sent to the large language model after the administrator deploys the template to a live agent, not when the prompt is run in the builder.
D. Prompt Builder runs a simulated call to the large language model to save on costs, so the prompt is never sent to the actual model.

Answer: B
Explanation:
Generative AI models are inherently probabilistic, meaning they do not produce the exact same

output every time, even when given the same input. When a Platform Administrator uses the Prompt Builder to test a template, each "Preview" or "Test" execution initiates a fresh, unique call to the Large Language Model (LLM). Because the LLM considers a range of linguistic possibilities and probabilities for each word it generates, the resulting text will vary slightly (or significantly) with each iteration. This behavior is expected and is a core characteristic of generative AI. To ensure consistent and high-quality results, administrators must refine their instructions to be as specific as possible, narrowing the LLM's range of creative interpretation. Options A, C, and D are incorrect because the Prompt Builder is designed to provide real-time feedback from the actual LLM to help administrators debug and perfect the prompt's logic before it is deployed to end-users or agents.

QUESTION 14
Management at Universal Containers would like to share dashboard components with their team in Chatter but currently does not have access to this capability. How should a Platform Administrator make this functionality available to management?

A. Enable reporting snapshots.
B. Select Download Chart on the component.
C. Set View Dashboard As to the dashboard viewer.
D. Enable dashboard feed tracking.

Answer: D
Explanation:
To allow users to post snapshots of dashboard components and engage in discussions about data directly on the dashboard, the Platform Administrator must enable Feed Tracking for dashboards. In Salesforce, Chatter Feed Tracking allows changes to records and interactions to be tracked and shared in the Chatter feed. For dashboards specifically, enabling this feature allows users to "Follow" a dashboard and use the "Post to Feed" functionality on individual dashboard components. This is highly effective for management teams who want to call out specific successes or areas of concern by tagging team members in a post that includes the visual chart. Reporting snapshots (Option A) are used for historical trend reporting, not social sharing. Downloading charts (Option B) is a manual file-handling process rather than an integrated social feature. Setting the "View Dashboard As" (Option C) determines data visibility but does not control Chatter functionality.

QUESTION 15
Sales reps miss key fields when filling out an opportunity record through the sales process. Reps need to move forward in stages but are unable to enter a previous stage. Which three options should a Platform Administrator use to address this need?

A. Mark fields required on the page layout.
B. Use Flow to mark fields required.
C. Configure Opportunity Path.
D. Use validation rules.
E. Enable guided selling.

Answer: ACD
Explanation:
To ensure data integrity and guide sales reps through a structured process, a Platform Administrator should use a combination of tools. Opportunity Path (Option C) provides a visual representation of the stages and allows the admin to highlight "Key Fields" and "Guidance for Success" for each stage, making it clear what information is needed to progress. To enforce the

entry of that data, Validation Rules (Option D) are used to prevent a user from moving to the next stage if specific fields are blank (e.g., AND(IsChanged(StageName), IsBlank(Discovery_Notes__c))). Additionally, marking fields as required on the Page Layout (Option A) ensures that the most fundamental data points are always captured. While Flow (Option B) can perform many tasks, it is not the primary way to mark fields as "required" in the UI. "Guided Selling" (Option E) is a specific term often associated with Salesforce CPQ rather than standard Opportunity management. Using Path, Validation Rules, and Page Layout requirements provides a robust framework for managing the sales lifecycle effectively.

QUESTION 16
What is an Agentforce use case in a sales organization?

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

Answer: D
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.

QUESTION 17
Cloud Kicks needs to be able to show different picklist values for sales and marketing users. Which two options meet this requirement?

A. Two permission sets, one record type, one picklist
B. One record type, two profiles, one picklist
C. One page layout, two record types, one picklist
D. Two page layouts, one record type, two picklists

Answer: CD
Explanation:
There are two primary ways to display different picklist values to different groups of users. The first, and most common, is using Record Types (Option C). A single picklist field can have its available values filtered at the Record Type level. By creating a "Sales" record type and a "Marketing" record type, the admin can select which values are visible for each. These record types are then assigned to the respective users' profiles. The second method (Option D) involves using different Page Layouts and two separate picklist fields. In this scenario, the admin creates two distinct fields (e.g., "Sales Category" and "Marketing Category") and places only the relevant field on the page layout assigned to that specific team. This is less common but effective if the data needs to be stored in entirely different buckets. Option B is incorrect because profiles themselves do not filter picklist values; they only control which record types a user can access.