Product Questions: 148

Version: 27.0

Question: 1

Cloud Kicks wants a report to categorize accounts into small, medium, and large based on the dollar value found in the Contract Value field. Which feature should a Platform Administrator use to meet this request?

A. Group Rows

B. Filter Logic

C. Detail Column

D. Bucket Column

Answer: D

Explanation:

In Salesforce reporting, a Bucket Column is the most efficient tool for categorizing records without the need for creating custom fields or complex formula logic. Bucketing allows an administrator to define ranges of values for a field—such as the "Contract Value" currency field—and assign a label to each range, such as "Small," "Medium," or "Large." This is particularly useful for grouping data into segments that do not exist natively in the data model. For example, if a "Small" account is defined as anything under $50,000 and "Large" is over $200,000, the bucket tool allows the admin to visually organize these in the report builder interface. Unlike Grouping Rows, which merely clusters identical values together, a Bucket Column transforms raw data into meaningful categories for visualization. This feature significantly enhances data storytelling by providing a summarized view of account distribution based on specific financial thresholds without impacting the actual Account record or requiring administrative overhead for new fields.

Question: 2

Universal Containers wants to ensure that cases are routed to the right people at the right time, but there is a growing support organization. The business wants to be able to move people around and adjust the work they get without having to request extra assistance or rely on the administrator teams. Which tool allows the business to control its own assignment of work?

A. Case Assignment Rules

B. Email-to-Case

C. Omni-Channel

D. Lead Assignment Rules

Answer: C

Explanation:

Omni-Channel is a comprehensive service tool designed to route work items (like Cases, Leads, or custom objects) to the most available and qualified support agents in real-time. Unlike Case Assignment Rules, which are often static and require administrative intervention to update complex logic, Omni-Channel allows for more dynamic management through the use of Queues and Presence Statuses. By using Omni-Channel, a support manager or "Supervisor" can monitor agent workloads and adjust capacity or move people between service channels without needing to modify the underlying system configuration or involve the Platform Administrator. It supports various routing models, such as "Least Active" or "Most Available," ensuring that work is distributed fairly and efficiently. This flexibility is vital for growing organizations that need to scale their support operations quickly while maintaining high service levels. Furthermore, it provides the business with the autonomy to manage its workforce effectively, as managers can see who is logged in and what they are working on, allowing for immediate adjustments to handle spikes in case volume.

Question: 3

Cloud Kicks is concerned that not everyone on the sales team is entering key data into accounts and opportunities that they own. Also, the team is concerned that if the key information changes, it does not get updated in Salesforce. A Platform Administrator wants to get a better understanding of their data quality and record completeness. What should the administrator do to accomplish this?

A. Explore AppExchange for data quality and record completeness solutions.

B. Create a report for Accounts and Opportunities highlighting missing data.

C. Subscribe the sales reps to a monthly report for accounts and opportunities.

D. Configure the key fields as required fields on the page layout.

Answer: B

Explanation:

The administrator's goal is to gain a better understanding of current data quality and record completeness issues in Accounts and Opportunities. Creating reports (or dashboards) that highlight blank or missing key fields—using filters like "Field equals (blank)" or formula fields to flag incompleteness—directly assesses the existing data by showing which records lack required information.

Why B is correct: Salesforce Trailhead modules on data quality emphasize using reports and dashboards (e.g., Account, Contact & Opportunity Data Quality Dashboard) to identify missing fields and measure completeness before implementing fixes.

Why not the others:

A: Exploring AppExchange apps is useful for advanced or ongoing solutions but skips the initial assessment step.

C: Subscribing reps to reports helps with awareness but doesn't provide the admin with an overview of data quality.

D: Making fields required prevents future issues but doesn't reveal current missing data or outdated records.

This approach aligns with Salesforce best practices: assess data quality first through reporting, then enforce improvements.

Question: 4

Northern Trail Outfitters has two different sales processes: one for business opportunities with four stages and one for partner opportunities with eight stages. Both processes will vary in page layouts and picklist value options. What should a Platform Administrator configure to meet these requirements?

A. Different page layouts that control the picklist values for the opportunity types

B. Separate record types and sales processes for the different types of opportunities

C. Validation rules that ensure that users are entering accurate sales stage information

D. Public groups to limit record types and sales processes for opportunities

Answer: B

Explanation:

To manage different business requirements for a single object like Opportunities, Salesforce utilizes a combination of Record Types and Sales Processes. A Sales Process is a specific feature for the Opportunity object that allows an administrator to select which "Stage" picklist values are visible. In this scenario, the admin would create one Sales Process for "Business" (4 stages) and another for "Partner" (8 stages). Once these processes are defined, they are linked to Record Types. Record Types are the engine that allows different users to see different Page Layouts and picklist options based on the "type" of record they are creating. This architecture ensures that users working on Partner deals are guided through the appropriate eight stages and see the relevant fields on their layout, while Business users have a streamlined four-stage experience. This separation is critical for maintaining data integrity and ensuring that the reporting for each pipeline is accurate. It prevents confusion by only showing users the options that are relevant to the specific context of the deal they are managing.

Question: 5

Cloud Kicks has hired a new sales executive who wants to implement a document merge solution in Salesforce. How should a Platform Administrator implement this solution?

A. Download the solution from AppExchange.

B. Install a package from the Partner Portal.

C. Create a managed package in AppExchange.

D. Configure the package from Salesforce Setup.

Answer: A

Explanation:

Salesforce does not provide a robust, native "document merge" engine that can handle complex templates, headers, and advanced formatting out of the box. Therefore, the standard practice for implementing such a solution is to download a third-party application from the AppExchange. The AppExchange is the primary marketplace for Salesforce-integrated solutions, offering popular document generation tools like Conga Composer, Nintex DocGen, or S-Docs. These tools allow administrators to create professional-grade documents (like quotes, contracts, and invoices) by merging Salesforce record data into Word, PDF, or Excel templates. As a Platform Administrator, the process involves researching the best-fit app for the requirements, installing the package into a Sandbox for testing, and then deploying it to Production. This approach is highly efficient because it leverages existing, vetted technology that is specifically designed to handle the complexities of document generation, saving the organization from trying to build a costly and difficult-to-maintain custom solution using code or complex automation.

Question: 6

How should a Platform Administrator view Currencies, Fiscal Year settings, and Business Hours in Salesforce?

A. User Management Settings

B. Company Settings

C. Custom Settings

D. Feature Settings

Answer: B

Explanation:

In the Salesforce Setup menu, Company Settings (formerly Company Profile) is the central location where global organizational parameters are managed. This section contains several key settings. Under Company Information, the admin can view the Org ID, default time zone, and primary currency. The Fiscal Year settings allow the admin to define whether the organization follows a standard Gregorian calendar or a custom fiscal cycle. Business Hours are used to define the working times for the organization, which is critical for calculating milestones in Service Cloud or escalation rules. If Multi-Currency is enabled, this is also where exchange rates and active currencies are managed. Viewing and configuring these settings is a foundational task for any Platform Administrator, as they establish the baseline for how data is interpreted and how time-based automation functions across the entire instance. Ensuring these are correct is vital for accurate financial reporting and maintaining service level agreements (SLAs).

Question: 7

A VP of sales needs to report on records owned by individuals in various parts of the role hierarchy. The organization-wide default is set to Private. What should a Platform Administrator configure to achieve this?

A. Field-Level Security

B. Sharing Rules

C. Permission Sets

D. Restriction Rules

Answer: B

Explanation:

When the Organization-Wide Default (OWD) for an object is set to Private, users can only see records they own or those shared with them. While the Role Hierarchy automatically grants "upward" visibility (managers see what subordinates own), it does not naturally allow for "lateral" visibility or visibility across different branches of the hierarchy. To solve this, a Platform Administrator should use Sharing Rules. Sharing Rules allow the admin to create exceptions to the Private OWD based on record ownership or specific criteria. For example, the admin can create an "Owner-based Sharing Rule" that shares all records owned by the "East Coast Sales" role with the VP of Sales (or a Public Group the VP belongs to). This provides a scalable way to grant the necessary visibility for reporting without making the data public to the entire company. Sharing Rules are a core security feature that ensures the right people have access to the right data while maintaining the principle of least privilege.

Question: 8

A Platform Administrator at Cloud Kicks has created an approval process for time-off requests. Which two automated actions are available for the administrator to add as part of the approval process?

A. Field Update

B. Email Alert

C. Chatter Post

D. Autolaunched Flow

Answer: A, B

Explanation:

Salesforce Approval Processes allow administrators to define a series of steps to automate the approval of records. Within these processes, there are four specific types of automated actions that can be triggered during initial submission, approval, rejection, or recall:

Field Update: Used to change a value on the record, such as switching a "Status" field from "Pending" to "Approved."

Email Alert: Used to send a templated email to specific users, such as notifying the submitter that their request was granted.

Task: Used to assign a follow-up task to a user.

Outbound Message: Used to send technical data to an external system via API.

While modern automation tools like Flow can post to Chatter or launch other flows, the native approval process engine is limited to these four specific actions. For a "time-off request" scenario, an Email Alert ensures the employee is notified, and a Field Update ensures the record reflects the new status, providing a clear audit trail of the business decision.

Question: 9

At Cloud Kicks, sales reps use discounts on the opportunity record to help win sales on particular products. When an opportunity is won, they then have to manually apply the discount to the related opportunity products. The sales manager has asked if there is a way to automate this time-consuming task. What should a Platform Administrator use to deliver this requirement?

A. Approval Process1

B. Formula Field2

C. Flow Builder3

D. Prebuilt Macro4

Answer: C

Explanation:

To automate the update of related records (Opportunity Products) based on a change to a parent record (the Opportunity), Flow Builder is the most powerful and app7ropriate tool. Specifically, a "Record-Triggered Flow" can be configured to fire whenever an Opportunity is updated to the "Closed Won" stage. The flow can then use a "Get Records" element to find all Opportunity Product records associated with that specific Opportunity and an "Update Records" element to apply the discount value from the parent to each line item. Formula Fields are insufficient here because they are "read-only" and cannot physically push data into other records for permanent storage. Approval Processes manage status changes but are not designed for bulk child-record updates. Flow Builder provides the logic necessary to handle this "one-to-many" update scenario, significantly reducing manual data entry for sales reps and ensuring that the financial data on the products accurately reflects the agreed-upon deal terms.

Question: 10

A Platform Administrator at Cloud Kicks is setting up a new Salesforce instance. The business requirements mandate that the marketers are given access to opportunities in order to maintain the campaign relationships on each opportunity. The administrator decides to assign the Marketing User profile. What should the administrator do next to achieve this requirement?

A. Edit the object permissions to include Opportunity.

B. Add a custom permission set to include Opportunity.

C. Edit the role to enable Sales access.

D. Configure the assigned apps to include Opportunity.

Answer: A

Explanation:

Profiles in Salesforce serve as the foundation for what a user can "do" with records, specifically defining Object-Level Security (Create, Read, Edit, Delete permissions). The standard Marketing User profile typically does not include full "Edit" access to the Opportunity object by default, as marketing roles are traditionally focused on Leads and Campaigns. To fulfill the requirement of allowing marketers to maintain campaign relationships on Opportunities, the administrator must ensure the profile has the necessary object permissions. If the organization is using a custom profile based on the Marketing User template, the admin should edit the object permissions directly on that profile to include "Read" and "Edit" for Opportunities. This allows the marketers to view the records and update the "Primary Campaign Source" field. While a Permission Set could also grant this access, the question implies the admin is currently configuring the profile itself. Adjusting the profile's object permissions is the direct way to align the user's capabilities with the business's functional requirements.

Question: 11

Cloud Kicks has implemented an Employee Agent to answer benefits questions for its employees. How should a Platform Administrator prevent the agent from responding to staff members' questions about the CEO's private health plan and benefits?

A. Configure assignment rules to assign the agent to employee data.

B. Ensure the users' permissions and field-level security restrict access to the CEO's health plan.

C. Modify the agent's instructions and guardrails to block questions related to the CEO's health plan.

D. Train the agent on employee health plans instead of the CEO's health plan.

Answer: B

Explanation:

In the context of Agentforce AI, grounding and data security are paramount. Salesforce AI agents, including Employee Agents, respect the existing security model of the Salesforce organization1. This means that the most effective way to prevent an agent from accessing or disclosing sensitive information, such as a CEO's private health plan, is to leverage Field-Level Security (FLS) and user permissions2. When an agent "grounds" its response, it only considers data that the running user (or the agent's service user) has the permission to view3. If the CEO's health records are stored in fields or records that are restricted via FLS or Sharing Settings from the profiles or permission sets used by the agent's context, the agent will simply not "see" that data during its retrieval phase4. While modifying instructions and guardrails (Option C) provides an additional layer of safety, it is not as foolproof as the underlying security architecture5. Training the agent (Option D) is not a standard configuration step for preventing specific record access in a production environment6. Therefore, maintaining a robust security model is the critical prerequisite for ensuring that AI agents provide accurate and safe responses without leaking confidential business information.

Question: 12

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 Filters

B. Public Dashboards

C. Dashboard's running user

D. Dashboard Subscriptions

Answer: C

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.

Question: 13

Cloud Kicks wants to leverage roll-up summaries on the Account object. Which standard object supports this roll-up summary natively?

A. Opportunity

B. Contact

C. Case

D. Campaigns

Answer: A

Explanation:

A Roll-up Summary Field is a powerful feature that calculates values from related records and displays them on a master record. However, this functionality is natively available only on the "Master" side of a Master-Detail relationship. For standard objects, Salesforce provides a built-in Master-Detail-like relationship between Accounts and Opportunities . Specifically, the Account object acts as the master, and the Opportunity object acts as the detail. This relationship allows a Platform

Administrator to create roll-up summary fields on the Account to calculate the sum of "Total Opportunity Amount," the "Minimum Close Date," or a "Count" of all related opportunities . Other standard objects like Contacts (Option B) and Cases (Option C) have a lookup relationship to Accounts rather than a master-detail relationship, and therefore do not support native roll-up summaries20. Campaigns (Option D) also do not share this specific relationship with Accounts21. If an administrator needs to roll up data from these other objects, they would typically need to use a custom solution like Flow Builder or a third-party app, whereas Opportunities are supported natively out of the box .

Question: 14

Which two actions should a Platform Administrator perform with Case escalation rules?

A. Send email notifications.

B. Change the Case Priority.

C. Reopen the Case.

D. Reassign the Case.

Answer: A, D

Explanation:

Case Escalation Rules are used in Service Cloud to ensure that cases are handled within specific timeframes, helping organizations meet their Service Level Agreements (SLAs)23232323232323. When a case meets the criteria defined in an escalation rule and remains unresolved for a specified period, the system can perform two primary automated actions:

Reassign the Case: The rule can automatically transfer ownership of the case to another user or a specific queue (e.g., a "Tier 2 Support" queue) to ensure it gets specialized attention242424242424242424.

Send Email Notifications: The system can send alerts to the new owner, the current owner, or up to five additional email addresses to notify management that a case has escalated .

While administrators often use other tools like Flow Builder to change the "Case Priority" (Option B) or "Reopen" a case (Option C), these are not standard features within the Escalation Rule interface26. Escalation rules focus specifically on the routing and notification aspects of case management to prevent tickets from "sitting" too long without a response .

Question: 15

Northern Trail Outfitters wants emails received from customers to generate cases automatically. How should a Platform Administrator ensure that the emails are sent to the correct queue?

A. Create an escalation rule to send cases to the correct queue.

B. Use a custom email service to set the owner of the case upon creation.

C. Utilize a flow to identify the correct queue and assign the case.

D. Configure Email-to-Case so emails are delivered to the correct queue.

Answer: D

Explanation:

The most efficient and standard way to automate case creation from inbound emails is by using Email-to-Case . When setting up Email-to-Case, the Platform Administrator configures "Routing Addresses" . For each routing address (e.g., support@company.com or billing@company.com), the administrator can specify a default owner or queue for the cases created via that specific address . This ensures that when a customer sends an email to the "Support" address, it is automatically routed to the Support Queue, and an email to the "Billing" address is routed to the Billing Queue . This configuration is handled directly within the Email-to-Case setup pages and does not require additional escalation rules (Option A) or complex custom flows (Option C) for the initial assignment . While a custom email service (Option B) is possible, it is a developer-centric approach that is generally unnecessary given the robust native capabilities of the standard Email-to-Case feature . This setup streamlines the intake process and ensures that customer issues are immediately visible to the correct service team34.

Question: 16

Leadership at Cloud Kicks wants to go beyond knowing how long a case has been open for, to knowing how long a case has sat with different teams. Which tool gives a Platform Administrator the ability to track the time a case sits and provide relevant reporting?

A. Escalation Rules with Business Hours

B. Record-Triggered Flows with Business Hours

C. Case Assignment Rules with Business Hours

D. Milestones with Business Hours

Answer: D

Explanation:

To track specific stages of a support process and measure the time elapsed within those stages, Salesforce provides Entitlements and Milestones . Milestones represent required steps in a support process, such as "First Response Time" or "Resolution Time"363636. When combined with Business Hours, Milestones allow the system to accurately calculate how long a case has been in a particular status or assigned to a specific team, excluding weekends or non-working hours . This provides leadership with granular reporting on "Team Performance" and SLA compliance . Escalation Rules (Option A) and Assignment Rules (Option C) are primarily routing tools; they can move a case but do not natively provide the timestamp-based tracking and reporting necessary to see duration across multiple "handoffs" . Record-Triggered Flows (Option B) could theoretically be used to stamp fields, but this would require significant custom development and would not offer the native, out-of-the-box reporting dashboards that come with the Milestones feature40. Therefore, Entitlement Management is the standard solution for tracking time-based service metrics41.

Question: 17

A Platform Administrator at Cloud Kicks needs to export a file of closed won opportunities from the last 90 days. The file should include the Opportunity Name, ID, Close Date, and Amount. What should the administrator use to export this file?

A. Data Loader

B. Data Import Wizard

C. Data Cloud Connection

D. Data Export Service

Answer: A

Explanation:

When an administrator needs to extract a specific subset of records (e.g., Opportunities filtered by stage and date) with specific fields, the Data Loader is the most appropriate tool . Data Loader is a client application that allows for bulk operations, including "Export" and "Export All"43. It allows the administrator to write a SOQL (Salesforce Object Query Language) query or use the built-in query builder to apply filters, such as StageName = 'Closed Won' and CloseDate = LAST_90_DAYS44. The Data Import Wizard (Option B) is primarily used for importing data and has very limited export capabilities, usually confined to simple CSV samples45454545. The Data Export Service (Option D), also known as "Weekly Export," is designed for full backup purposes; it exports the entire database into zip files and does not allow for specific filtering of records or fields for a quick ad-hoc report . Data Cloud (Option C) is a large-scale data platform and is overkill for a simple file export task47. Thus, for targeted, field-specific exports of 90 days of data, Data Loader is the standard choice .

Question: 18

The Cloud Kicks CFO requires any opportunity over $100,000 to be automatically sent to them, so they can sign off on the record before the deal closes. Which feature should a Platform Administrator use to fulfill this requirement?

A. Submit for Approval button

B. Einstein Next Best Action

C. Apex Triggers

D. Flow Approvals

Answer: D

Explanation:

The requirement to have a record "signed off" by a specific individual (the CFO) based on a dollar threshold is a classic use case for an Approval Process . While the "Submit for Approval" button (Option A) allows a user to manually start the process, the prompt specifies that the process should happen "automatically"50. To achieve this automation, the Platform Administrator should use Flow Builder to trigger the approval process . A Record-Triggered Flow can be set to run when an Opportunity is created or updated and meets the criteria (Amount > $100,000) . The flow would then use the "Submit for Approval" action to launch the record into the predefined approval process without requiring the sales rep to click a button . Einstein Next Best Action (Option B) is a recommendation tool, not a workflow enforcement tool54. Apex Triggers (Option C) could perform this task, but Salesforce best practices recommend using "clicks not code" (Flow) whenever possible for such requirements . Using Flow to launch an Approval Process provides the necessary automation, routing, and audit trail the CFO requires

Question: 19

Universal Containers wants to implement collaborative selling where multiple roles work together on customer accounts. Sales reps need full access to their assigned accounts, while customer support reps and sales engineers need access to opportunities and cases related to specific accounts they support. The sales manager wants to streamline the process by automatically adding the same team members to multiple accounts. Which feature should a Platform Administrator configure to meet this requirement?

A. Set up default account teams with specified access levels for different team roles.

B. Create sharing rules to grant access to opportunities and cases for support teams.

C. Configure role hierarchy to automatically grant account access to the appropriate teams.

D. Use permission sets to provide additional access to account-related records.

Answer: A

Explanation:

Account Teams are designed specifically for "collaborative selling," allowing multiple users to work together on a single Account . By using Account Teams, an administrator can define specific roles (e.g., Sales Engineer, Support Rep) and grant them varying levels of access (Read/Write or Read Only) to the Account and its related Opportunities and Case . To meet the manager's requirement of "streamlining" and "automatically adding" members, the administrator should encourage users to set up Default Account Teams . Once a user defines their default team in their personal settings, they can click a single button to add that entire team to any Account they own . Sharing Rules (Option B) are typically too broad for this requirement because they apply to all records meeting a criteria, rather than specific collaborative groups61. The Role Hierarchy (Option C) provides vertical access but doesn't easily handle the horizontal, project-based access required for support reps and engineers working on specific accounts62. Permission Sets (Option D) grant functional permissions (what a user can do) but do not grant access to specific data records in a collaborative way63.

Question: 20

A Platform Administrator wants to customize the navigation menu for users in the Salesforce mobile app. The organization has not yet implemented any Lightning apps for mobile use. Which statement about the Mobile Only app navigation is correct?

A. Lightning pages and Visualforce pages automatically appear in the Mobile Only navigation menu without requiring tabs to be created first.

B. The Mobile Only app can be customized to show different navigation menus for different user profiles and permission sets.

C. The first four items in the Mobile Only navigation menu appear both in the navigation menu and in the navigation bar at the bottom of the screen.

D. The Mobile Only app automatically includes all standard Salesforce objects in the navigation menu based on user permissions.

Answer: C

Explanation:

The Mobile Only app is the default navigation experience in the Salesforce mobile app when no other Lightning apps have been assigned to a user for mobile use64. In this configuration, the navigation menu is controlled globally via the "Salesforce Navigation" setup page6565. A key behavior of this interface is that the first four items placed in the navigation list become the "persistent" icons that appear in the navigation bar at the bottom of the mobile screen for quick access66. These same items also appear at the top of the "Menu" tab67. Option A is incorrect because pages must have a corresponding Tab created before they can be added to the navigation menu68. Option B is incorrect because the "Mobile Only" navigation is a single global setting for the entire org; if you need different menus for different profiles, you must create and deploy specific Lightning Apps69. Option D is incorrect because standard objects do not appear automatically; the administrator must explicitly add them to the navigation list in Setup70. Understanding this behavior is essential for ensuring mobile users have a streamlined and intuitive interface

Question: 21

At Cloud Kicks, cases are being assigned a default Case Owner and showing a Created By and Last Modified By that is not expected. The company wants to change this to an integration user to alleviate confusion with the business. What should a Platform Administrator edit to change this in Salesforce?

A. Process Automation Settings

B. Debug Logs

C. Support Processes

D. Support Settings

Answer: D

Explanation:

In Salesforce, Support Settings is the primary configuration page for determining how the Service Cloud handles automated case updates. This section allows a Platform Administrator to define the "Default Case Owner" and the "Automated Case User." The Automated Case User is the user listed in the Case History for automated actions, such as those triggered by assignment rules, escalation rules, or Email-to-Case. If the business sees an "unexpected" user name in the Created By or Last Modified By fields during these automated processes, it is usually because this setting is pointing to a specific administrator or a system user. By updating the Automated Case User to a dedicated "Integration User," the admin ensures that the audit trail clearly distinguishes between manual edits made by staff and automated updates made by the system. This provides better clarity for the support team and prevents confusion regarding who is responsible for specific record changes.

Question: 22

A sales rep at Ursa Major Solar has launched a series of networking events. They are hosting one event per month and want to be able to report on Campaign ROI by month and series. How should a Platform Administrator set up the Campaign to simplify reporting?

A. Create individual Campaigns that all have the same name.

B. Configure Campaign Member Statuses to record which event Members attended.

C. Use Campaign Hierarchy where the monthly events roll up to a parent Campaign.

D. Add different record types for the monthly event types.

Answer: C

Explanation:

To organize related marketing initiatives and simplify reporting, Salesforce utilizes Campaign Hierarchies. A hierarchy allows an administrator to link multiple campaigns together using the "Parent Campaign" field. In this scenario, the admin should create a "Parent" campaign to represent the entire networking series and then create individual "Child" campaigns for each monthly event. This structure provides two major benefits: it allows the sales rep to see the specific performance (ROI, members, responses) of a single monthly event, and it uses "Hierarchy Total" fields to automatically roll up all those metrics to the parent level. This provides a holistic view of the entire series' success without requiring complex manual calculations. Using the same name for campaigns (Option A) leads to data confusion, and while member statuses (Option B) are useful, they do not provide the structural "series vs. month" reporting required here. Campaign Hierarchy is the standard architectural approach for multi-touch or recurring marketing efforts.

Question: 23

A Platform Administrator needs to create a new prompt template to automatically summarize customer cases for a sales team. The administrator wants to dynamically populate the response with data from the case record. What should the administrator use to display real Salesforce data in an agent response from a prompt template?

A. Flow

B. Picklists

C. Agent Instructions

D. Merge Fields

Answer: D

Explanation:

When building prompt templates within the Prompt Builder, the most direct way to inject specific record data into the AI's instructions is through Merge Fields. Much like an email template or a mail merge, merge fields allow the administrator to reference specific fields from the object in context—in this case, the Case object. For example, an administrator might use {!$Input:Case.Subject} or {!$Input:Case.Description} within the prompt template. When the agent runs, it replaces these placeholders with the actual data from the specific case record being viewed. This ensures that the AI has the "grounding" information it needs to generate an accurate and relevant summary. While Flows (Option A) can be used for more complex data retrieval, Merge Fields are the standard, low-code tool for simple record-to-prompt data population. Agent Instructions (Option C) provide the "how-to" logic for the AI but do not themselves represent the dynamic data points from the Salesforce database.

Question: 24

A Platform Administrator at Cloud Kicks has set up a junior administrator as a delegated administrator in Salesforce. What should the Platform Administrator consider regarding delegated administrators?

A. Delegated administrators can unlock users but cannot reset passwords.

B. Delegated administrators can update field-level security on standard objects.

C. Delegated administrators cannot modify permission sets.

D. Delegated administrators cannot assign users to profiles.

Answer: C

Explanation:

Delegated Administration is a powerful feature that allows a System Administrator to pass off specific administrative tasks to non-admin users without granting them the full "Modify All Data" permission. However, there are strict security boundaries to what a delegated admin can do. One of the most critical limitations is that delegated administrators cannot modify permission sets. They are primarily intended to manage users within specific roles, reset passwords, and manage specific custom objects. While they can assign users to certain profiles that have been explicitly allowed in the Delegated Administration group configuration, they are not permitted to manage the broader security architecture of the org, such as Permission Sets or Field-Level Security (Option B). This ensures that while junior staff can handle day-to-day user maintenance (like unlocking users, contrary to Option A), they cannot inadvertently elevate their own permissions or those of others through permission set manipulation.

Question: 25

Ursa Major Solar classifies its accounts as Silver, Gold, or Platinum Level. When a new case is created for a Silver or Gold partner, it should go to the Regular Support Queue. When an account is Platinum Level, it should automatically go to the Priority Support Queue. What should a Platform Administrator use to achieve this?

A. Escalation Rules

B. Assignment Rules

C. Case Rules

D. Workflow Rules