ExamsIndex
Practice Materials & Tests

DEMO VERSION

Salesforce

Plat-Admn-201 Exam

Salesforce Certified Platform Administrator Exam

Exam Latest Version: 29.0

Question 1. (Single Select)

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

Correct 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. (Multi Select)

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

Correct 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 3. (Single Select)

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

Correct 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 4. (Single Select)

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

Correct 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 5. (Multi Select)

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