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Salesforce ADM-201 Exam Questions

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Question: 1

The administrator at cloud kicks has been ask to change the company's Shoe style field to prevent users from selecting more than one style on a record.
Which two steps should an administrator do to accomplish this?
Choose 2 answers

A. Reactivate the appropriate Shoe Style values after the field type changes.

B. Select the "Choose only one value "checkbox on the pick list field.

C. Back-up the Shoe Style values in existing records.

D. Change the field type from a multi-select picklist field to a picklist field.

Answer:

C, D

Explanation:

To meet the requirement of allowing only a single selection, the field type must be converted from a Multi-Select Picklist to a standard Picklist. This action is reflected in option D.
However, when converting a multi-select picklist to a single-value picklist, Salesforce retains only the first value from the existing records' selections, leading to data loss for all other previously CertEmpire selected values. Therefore, a critical best practice and necessary step is to back up the data in existing records before performing the conversion. This allows for data preservation and potential restoration if needed.

Why Incorrect Options are Wrong:

A. Reactivate the appropriate Shoe Style values after the field type changes.
The picklist values themselves are not deactivated during this type of field conversion; they are retained for the new field type.
B. Select the "Choose only one value "checkbox on the pick list field.
This is not a real feature. The ability to select one versus multiple values is determined by the field type (Picklist vs. Multi-Select Picklist), not a checkbox setting.

References:

1. Salesforce Help Documentation, "Notes on Changing Custom Field Types":
Reference: Under the section for converting a "Picklist (Multi-Select)" to a "Picklist", the documentation states: "If you convert a multi-select picklist to a picklist, the first value in the multi-select picklist becomes the value of the picklist field." This directly confirms the data loss risk, making a backup (Option C) essential.
2. Salesforce Help Documentation, "Back Up Metadata and Data":
Reference: This article outlines best practices, stating, "We recommend that you back up your

data and metadata on a regular basis... before you perform any major data operation in your org... or before you make any major schema changes, such as changing field types." This supports the necessity of Option C.

3. Salesforce Help Documentation, "Edit Custom Fields":

Reference: This document details the procedure for modifying a field, which includes the "Change Field Type" button. This action is the direct implementation of the required change (Option D).

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Question: 2

Universal Containers 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?
Choose 2 answers

A. Create a junction with a custom object.

B. Create two master detail relationships on the new object.

C. Create two lookup relationships on the new object.

D. Create URL fields on a custom object.

Answer:

A, B

Explanation:

A many-to-many relationship in Salesforce is established by using an intermediary custom object, commonly referred to as a "junction object." This junction object connects two other objects, which become its "masters." The core of this structure requires creating two master-detail relationships on the junction object. The first master-detail relationship links the junction object to CertEmpire the first master object, and the second master-detail relationship links it to the second master object. This configuration allows a single record from either master object to be associated with multiple records from the other, via the records in the junction object.

Why Incorrect Options are Wrong:

C. Create two lookup relationships on the new object.
Using two lookup relationships creates a "loosely coupled" relationship, not the standard, tightly-coupled many-to-many relationship where sharing and record deletion are cascaded from the master objects.
D. Create URL fields on a custom object.
URL fields are designed to store web addresses and are not used for creating or defining relationships between Salesforce objects.

References:

1. Salesforce Help Documentation, "Create Object Relationships." Under the section "Relationship Types," the "Many-to-Many" subsection explicitly states: "You can use master-detail relationships to model many-to-many relationships between any two objects... To create this relationship, create a custom junction object... Then create two master-detail relationships on the junction object..." This directly supports creating a junction object (A) and using two master-detail relationships (B).

2. Salesforce Developer Documentation, "Relationships Among Objects." The section "Many-to-Many Relationships" states: "Many-to-many relationships are created using a junction object. A junction object is a custom object with two master-detail relationships. The two master-detail relationships link the junction object to two other objects, called master objects." This confirms the required components are a custom junction object and two master-detail relationships.

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Question: 3

A user at Universal Containers left the company. The administrator needs to create new user for their replacement, but they have assigned all available users licenses.
What should the administrator do to free up users licenses for the new users?

A. Deactivate the former employees user record.

B. Delete former employees user record.

C. Freeze former employees user record.

D. Change the formers users record to the new user.

Answer:

A

Explanation:

The correct and standard procedure in Salesforce when an employee leaves is to deactivate their user record. Deactivating a user prevents them from logging in and immediately frees up their Salesforce license, which can then be assigned to the new employee. This process maintains the integrity of historical data, as all records and activities previously associated with the former employee remain attributed to their inactive record. This is the official best practice for managing user licenses and offboarding employees.

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Why Incorrect Options are Wrong:

B. Delete former employees user record.
Salesforce does not permit the deletion of user records. This is to preserve the audit trail and historical context of records they created or modified.
C. Freeze former employees user record.
Freezing a user account only temporarily suspends their ability to log in. It does not release the user license for reallocation to another user.
D. Change the formers users record to the new user.
This is a poor practice that compromises data integrity. Reassigning the record would incorrectly attribute all of the former employee's historical actions to the new user, corrupting the audit trail.

References:

1. Salesforce Help Documentation, "Deactivate Users": This document explicitly states, "When a user no longer needs to access Salesforce... you can deactivate their account. Deactivating a user removes them from all delegated groups, sharing privileges, and teams, but it preserves their historical activity... Deactivating a user frees up a Salesforce license."
Source: Salesforce Help, Article 000384393.

2. Salesforce Help Documentation, "Considerations for Deactivating Users": This guide reinforces the inability to delete users. It states, "You can't delete a user, but you can deactivate an account so a user can't log in to Salesforce."
Source: Salesforce Help, Article 000384394.
3. Salesforce Help Documentation, "Freeze or Unfreeze User Accounts": This source clarifies the function of freezing, distinguishing it from deactivation. It notes, "Freezing user accounts doesn't make their user licenses available for other users. To make a license available, you must deactivate the account."
Source: Salesforce Help, Article 000384395.

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Question: 4

The events manager at dream house realty has a hot lead from a successful open house that needs to become a contact with an associated opportunity.
How should this be accomplished from the campaign keeping the associated campaign member history?

A. Delete the lead and create a new contact and opportunity.

B. Clone the lead and convert the cloned record to a contact.

C. Convert the lead from the campaign member detail page.

D. Add a contact from a campaign member detail page.

Answer:

C

Explanation:

The standard Salesforce lead conversion process is the correct method for this scenario. When a lead is converted, Salesforce creates an Account, a Contact, and optionally an Opportunity. Crucially, this process automatically transfers the lead's campaign history to the new contact record. This ensures that the link between the new contact and the original "open house" CertEmpire campaign is preserved, fulfilling the requirement to keep the associated campaign member history. Initiating this action from the campaign member detail page is a direct and valid way to start the conversion.

Why Incorrect Options are Wrong:

A. Deleting the lead permanently removes its record and all associated history, including the campaign membership, which is the opposite of the desired outcome.
B. Cloning creates an unnecessary duplicate lead record. Converting the clone would not associate the original lead's campaign history with the new contact.
D. This action would create a new, separate contact but fails to convert the existing lead, resulting in duplicate records and an incomplete lead lifecycle.

References:

1. Salesforce Help Documentation: Convert Qualified Leads. Under the "What Happens When You Convert Leads?" section, the documentation states: "Campaign History: The Campaign History related list of the lead is moved to the contact record." This confirms that the standard conversion process preserves the campaign association.
2. Trailhead Module: Leads & Opportunities for Lightning Experience. In the unit "Qualify and Convert Leads," it is explained: "When you convert a lead, the campaign member information is transferred to the contact record." This directly supports that conversion is the correct procedure

to maintain campaign history.
3. Salesforce Help Documentation: Considerations for Converting Leads. This document details the effects of lead conversion, noting: "The campaign member record is moved to the new contact." This explicitly verifies that the campaign member status is transferred, not lost.

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Question: 5

Cloud kicks has the organization-wide sharing default set to private on the shoe object. The sales manager should be able to view a report containing shoe records for all of the sales reps on their
team.
Which 3 items should the administrator configure to provide appropriate access to the report?
Choose 3 answers

A. Custom report type.

B. Folder access

C. Report subscription

D. Field level security

Answer:

A, B, D

Explanation:

To provide the sales manager with appropriate report access, three components must be configured. First, the report must be placed in a shared folder, and the manager must be granted Folder Access (B) to view it. Second, the manager's profile or permission set requires the correct Field-Level Security (D) to see the data in the report's columns. Third, a Custom Report Type (A) may be necessary to define the specific objects and fields available for the report if a standard type is insufficient. These steps control access to the report definition, its structure, and its data columns. The underlying record-level access for the manager to see their team's records is handled by the role hierarchy, which is a foundational prerequisite in this scenario.

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Why Incorrect Options are Wrong:

C. Report subscription: This feature is used to schedule and email report results to users who already have access. It does not grant access to the report or its underlying data.

References:

1. Folder Access (B):

Source: Salesforce Help Documentation

Reference: Article "Share a Report or Dashboard Folder". It states, "To share a report or dashboard folder, you need Viewer, Editor, or Manager access to it... Your access level to a folder determines what you can do with the folder and its contents." This confirms that folder access is required to view the report.

2. Field-Level Security (D):

Source: Salesforce Help Documentation

Reference: Article "Set Field-Level Security for a Field on a Profile". It details, "Field-level security settings let you restrict what fields users can view and edit... If a user doesn't have 'Read' access to a field, that field's column is not visible in any reports." This directly links FLS to report column visibility.

3. Custom Report Type (A):

Source: Salesforce Help Documentation

Reference: Article "Create a Custom Report Type". It explains, "Report types act as a template... You choose which objects and fields are available to users who are creating reports from the custom report type." This establishes the CRT as a necessary configuration for defining the report's structure and available data.

4. Role Hierarchy (Implicit Prerequisite):

Source: Salesforce Help Documentation

Reference: Article "Control Access to Records". It clarifies, "The first step in controlling data access is to set your organization-wide sharing defaults... To open up access to records, you can use... a role hierarchy." With a private OWD, the role hierarchy is the standard mechanism that grants managers access to their team's records, which then appear in the report.

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Question: 6

The sales team at Ursa Major Solar has asked the administrator to automate an outbound message.
What should the administrator utilize to satisfy the request?

A. Process builder

B. Task assignment

C. Workflow rule

D. Flow builder

Answer:

D

Explanation:

Flow Builder is the recommended and most current Salesforce tool for building all new automation. To automate an outbound message, an administrator should create a record-triggered flow. Within the flow, the 'Action' element is used to call a pre-configured 'Outbound Message' action. While the outbound message component is configured under 'Workflow Actions' in Setup, Flow Builder is the modern tool utilized to trigger and automate its execution. Salesforce is retiring Workflow Rules and Process Builder, making Flow the correct, future-proof choice for new requests.

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Why Incorrect Options are Wrong:

A. Process Builder: This tool is being retired by Salesforce. It also cannot directly send an outbound message as one of its immediate actions.
B. Task assignment: This action creates a to-do item for a Salesforce user and does not send information to an external system.
C. Workflow Rule: Although Workflow Rules can send outbound messages, this is a legacy automation tool that Salesforce is retiring. All new automation should be built using Flow Builder.

References:

1. Salesforce Help, Record-Triggered Automation: The official documentation provides a comparison of automation tools and states, "For all new automation, we recommend that you build in Flow Builder." This establishes Flow as the current best practice. (See the "Which Automation Tool Do I Use?" section).
2. Salesforce Help, Send an Outbound Message from a Record-Triggered Flow: This document explicitly details the procedure. "To send an outbound message from your flow, add an Action element. Then, in the Action field, select the outbound message that you created in Setup." This confirms Flow Builder is the tool used to automate the action.

3. Salesforce Architects, Salesforce Flow: "Salesforce Flow is the future of automation in Salesforce... With the announced retirement of Workflow Rules and Process Builder, you should be building all of your new automation in Flow." This reinforces the strategic direction away from legacy tools.
4. Salesforce Help, Define Outbound Messages: This document explains how to configure the outbound message itself, which is a prerequisite. It notes that these messages can be triggered by "a record-triggered flow, a process, or a workflow rule," further confirming that Flow is a valid and primary trigger mechanism.

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Question: 7

Sales managers would like to know what could be implemented to surface important values based on the stage of the opportunity.
Which tool should an administrator use to meet the requirement?

A. Dynamic forms

B. Path key fields

C. Opportunity processes

D. Workflow rules

Answer:

B

Explanation:

Path is a visualization tool in Salesforce that displays the steps in a process, such as the stages of an opportunity. Administrators can configure a Path to highlight up to five key fields for each specific stage. These "Key Fields" are surfaced directly below the Path on the record page, providing sales managers and users with immediate visibility into the most important information relevant to the current stage of the opportunity, guiding them on what to focus on.

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Why Incorrect Options are Wrong:

A. Dynamic Forms: Dynamic Forms control the visibility of fields and sections on a record page based on criteria, but they do not specifically "surface" or highlight key fields within a process visualization like Path does.
C. Opportunity Processes: An Opportunity Process defines the sequence of stages an opportunity follows. It is a prerequisite for creating a Path but does not, by itself, display or highlight key fields on the user interface.
D. Workflow Rules: Workflow Rules are an automation tool for backend processes like field updates or sending emails. They have no user interface component to visually surface or highlight fields on a record page.

References:

1. Salesforce Help - Guide Users with Path: "At each step of a process, help your users succeed with guidance for success, such as tips, links, and company policy information. And highlight key fields to help users focus on what's most important." This document explicitly states that Path is used to highlight key fields at each step.
2. Salesforce Help - Set Up Path: Under the section "Enable Path and Configure a Path," the documentation details the steps: "For each step in the path, select up to five key fields to display... The fields you select appear in the path's key fields area." This confirms the functionality

described in the question.

3. Salesforce Help - Dynamic Forms: "With Dynamic Forms, you can...place fields and sections wherever you want on the page...and use visibility rules to show and hide fields and sections." This source clarifies that its primary function is controlling layout and visibility, not highlighting fields within a process guide.

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Question: 8

Cloud kicks needs to ensure appropriate shipping details are used in orders. Reps should have a streamlined solutions to update the shipping address on selected orders associated with an account
when the shipping address is changed on the account.
How should the administrator deliver this requirement?

A. An autolaunched flow on the order page that updates all open orders shipping addresses whenever
the account shipping addresses changes.

B. An autolaunched flow on the account page that updates all open orders shipping addresses whenever
the account shipping addresses changes.

C. A screen flow on the order page that lets the reps choose the updated account shipping address in
all open associated orders

D. A screen flow on the account page that lets the reps choose the updated account shipping address
in

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all open associated orders

Answer:

D

Explanation:

The requirement specifies a "streamlined solution" for representatives to update selected orders, which implies user interaction is necessary. A Screen Flow is the appropriate automation tool for guided, interactive processes. The logical place to initiate this action is on the Account page, immediately after the account's shipping address has been changed. The Screen Flow can be launched from a button or action on the Account record page, display a list of associated open orders, and allow the representative to choose which specific orders to update with the new address.

Why Incorrect Options are Wrong:

A. An autolaunched flow on the order page that updates all open orders shipping addresses whenever the account shipping addresses changes.
An autolaunched flow provides no user interface for selecting specific orders; it would update all of them automatically, which contradicts the requirement.
B. An autolaunched flow on the account page that updates all open orders shipping addresses

whenever the account shipping addresses changes.
This is incorrect for the same reason as option A. An autolaunched flow is a background process and does not allow for the user selection of selected orders.
C. A screen flow on the order page that lets the reps choose the updated account shipping address in all open associated orders.
Placing the flow on the Order page is inefficient. The user would be on the Account page when changing the address, making it the logical place to launch the update process.

References:

1. Salesforce Help Documentation, "Flow Builder": This document distinguishes between flow types. It states, "Screen Flow: Guides users through a business process that's launched from a Lightning page, Experience Cloud site, quick action, or elsewhere." This supports the use of a Screen Flow for a user-driven process. (See section: "Flow Types").
2. Salesforce Help Documentation, "Distribute a Flow": This guide explains how to make flows available to users. It details adding a flow to a Lightning record page, which aligns with launching the Screen Flow from the Account page. (See section: "Add a Flow to a Lightning Page").
3. Salesforce Trailhead, "Screen Flow Distribution" Module, "Add a Flow to a Record Page" Unit: This module provides a step-by-step tutorial on embedding a Screen Flow component directly onto a Lightning record page, such as the Account page, to provide contextual actions for users. This directly supports the solution in option D.

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Question: 9

The 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
a search engine from a picklist. If lead source is not "Search Engine", this picklist should be hidden.
How should the administrator complete this requirement?

A. Assign a decision element to direct the user to a second screen to hold specific search engine only
when a lead source is "Search Engine".

B. Use an assignment element, 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 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"

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Answer:

C

Explanation:

The most efficient and user-friendly solution is to use the built-in conditional visibility feature for screen components within a single screen. This feature allows an administrator to define logic directly on a component, such as a picklist, to determine whether it should be displayed to the user. By setting the visibility of the "Specific Search Engine" picklist to depend on the "Lead Source" field's value being "Search Engine," the requirement is met seamlessly on one screen without extra navigation or complex flow logic.

Why Incorrect Options are Wrong:

A. A Decision element and a second screen create a disjointed user experience. This approach is less efficient than using conditional visibility on a single screen for one dependent field.
B. An Assignment element is used to assign values to variables within the flow. It cannot be used to control the visibility of components on a user-facing screen.
D. Validation rules in a flow screen are used to enforce data integrity (e.g., making a field required or checking its format). They do not control whether a component is visible or hidden.

References:

1. Salesforce Help, Flow Builder, "Control Visibility of Screen Components": "You can declare that a component appear only when certain conditions are met. This feature is supported for all standard screen components... For example, on a screen that collects contact information, show a text box for a mailing address only when a checkbox for 'Mail a welcome packet' is selected." This directly supports using conditional visibility for the described scenario.
2. Salesforce Help, Flow Concepts, "Flow Element: Screen": The documentation for the Screen element details its properties, including the ability to add components and configure their individual attributes. The "Set Component Visibility" section is a key feature described here.
3. Salesforce Help, Flow Concepts, "Flow Element: Decision": This document explains that a Decision element "evaluates a set of conditions and routes the user down a path based on the outcome of those conditions." While it can route a flow, it is not the primary tool for controlling component visibility within a single screen.

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Question: 10

The administrator at cloud kicks is trying to debug a screen flow that create contacts. One of the variables in the flow is missing on the debug screen.
What could cause this issue?

A. The available for input checkbox was unchecked.

B. The flow is an inactive version

C. The field type is unsupported by debugging.

D. The available for output checkbox was unchecked.

Answer:

A

Explanation:

When debugging a flow, the initial screen allows the administrator to set values for any variables designated as "Available for Input." If a variable is intended to receive a value at the start of the debug process but is missing from this screen, it is because its "Available for Input" checkbox has been left unchecked in the variable's configuration. This setting explicitly controls whether the variable is exposed for initialization when the flow is run or debugged.

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Why Incorrect Options are Wrong:

B. The flow is an inactive version: Salesforce allows debugging for both active and inactive flow versions. In fact, debugging an inactive version is a standard best practice before activation.
C. The field type is unsupported by debugging: While some complex data types have limitations, most standard and custom field types are fully supported in the Flow Debugger. This is an unlikely cause for a common scenario.
D. The available for output checkbox was unchecked: This setting determines if a variable's final value can be passed to another process that called the flow. It does not affect the variable's visibility within the flow's own debug log.

References:

1. Salesforce Help - Flow Resource: Variable: "To let the value of the variable be set at the start of the flow... select Available for Input." This documentation confirms that the variable must be explicitly marked for input to appear on the initial debug screen.
2. Salesforce Help - Debug a Flow in Flow Builder: "If your flow has variables that are available for input, you can set their values for the test run." This directly links the "Available for Input" property to the ability to set values on the debug screen, implying its absence if the property is not set.

Question: 11

Cloud Kicks executives have noticed the opportunity Expected revenue Field displays incorrect values.
How Should the administrator correct this?

A. Update the expected revenue associated with the stage.

B. Adjust the forecast category associated with the stage.

C. Modify the closed won value associated with the stage.

D. Change the probability associated with the stage.

Answer:

D

Explanation:

The 'Expected Revenue' field on an Opportunity is a standard formula field that calculates its value by multiplying the 'Amount' field by the 'Probability' field (Amount Probability %). The 'Probability' percentage is directly determined by the 'Opportunity Stage' selected for the record. To correct a systemic issue with incorrect 'Expected Revenue' values, the administrator must adjust the 'Probability' percentage assigned to the relevant Opportunity Stage(s) in the setup menu.

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Why Incorrect Options are Wrong:

A. Update the expected revenue associated with the stage.
This is incorrect because 'Expected Revenue' is a calculated field on the Opportunity record itself, not a value that can be directly set on the Stage.
B. Adjust the forecast category associated with the stage.
The 'Forecast Category' (e.g., Pipeline, Best Case, Commit) is used for forecasting reports and does not affect the 'Expected Revenue' calculation.
C. Modify the closed won value associated with the stage.
'Closed/Won' is a stage status, not a modifiable value that influences the 'Expected Revenue' calculation for open opportunities.

References:

1. Salesforce Help, Opportunity Fields: "Expected Revenue: Read only. Calculated as Amount multiplied by Probability. The value is in the user's personal currency." This confirms the calculation method.
2. Salesforce Help, Manage Opportunity Stages: "Each opportunity stage is mapped to a type, probability, and forecast category... Probability: The percent likelihood that the opportunity will close. You can customize this value." This document explicitly states that Probability is a

customizable attribute of the Opportunity Stage.
3. Trailhead, Salesforce Basics, Get Started with Sales Cloud: In the "Track Your Deals with Opportunities" unit, it states, "Expected Revenue is the Amount multiplied by the Probability." This reinforces the core formula.

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Question: 12

The administrator at cloud kicks has been told that users are unable to add repeating tasks in salesforce.
Which two solutions the administrator use to ensure users are able to do this?
Choose 2 Answers

A. Enable creation of Recurring Tasks in Activity Settings

B. Disable shares Activities.

C. Add create Recurring series of Tasks field on Page Layouts

D. Turn on Task Notifications service.

Answer:

A, C

Explanation:

To enable the creation of repeating tasks, a Salesforce administrator must perform two key actions. First, the feature must be enabled at the organization-wide level. This is done by navigating to 'Activity Settings' in Setup and selecting "Enable Creation of Recurring Tasks." Second, for users to access this functionality, the necessary fields must be visible on their user CertEmpire interface. The administrator must edit the Task page layout(s) to add the "Create Recurring Series of Tasks" checkbox and the associated recurrence pattern fields. Without both the org-wide setting and the page layout modification, users will be unable to create repeating tasks.

Why Incorrect Options are Wrong:

B: Shared Activities is a separate feature that allows relating a single task to multiple contacts or one lead; it does not impact the ability to create recurring tasks.
D: Task Notifications are related to user alerts and reminders for tasks. This service does not control the ability to create a recurring series of tasks.

References:

1. Salesforce Help, Article 000385144, "Enable Creation of Recurring Tasks": This document explicitly states the first required step. It instructs, "From Setup, in the Quick Find box, enter Activity Settings. Select Activity Settings. Select Enable Creation of Recurring Tasks. Click Submit." This directly supports option A.
2. Salesforce Help, Article 000385145, "Create Recurring Tasks in Lightning Experience": This guide details the user process and includes a critical note for administrators: "If you don't see the option to create a recurring task, ask your Salesforce admin to add the recurring task feature to your page layouts." This confirms the necessity of modifying the page layout, supporting option C.
3. Salesforce Help, Article 000385146, "Considerations for Creating Recurring Tasks": This

document outlines the functionality and prerequisites, implicitly confirming that the feature must be both enabled (org setting) and made available on the page layout for users to interact with it.

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Question: 13

An administrator at Northern Trail Outfitters is unable to add a new user in salesforce.
What could cause this issue?

A. The Username is not a corporate email address

B. The username is less than 80 characters.

C. The Username is a fake email address.

D. The Username is already in use.

Answer:

D

Explanation:

A Salesforce username must be globally unique across all Salesforce organizations, not just the one in which the user is being created. If an administrator attempts to create a new user with a username that already exists in any Salesforce instance worldwide (including trial or developer orgs), the system will prevent the creation and display an error. The username must be formatted like an email address (e.g., user@domain.com), but it does not need to be a valid or corporate email address.

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Why Incorrect Options are Wrong:

A. The Username is not a corporate email address: A username must be in an email format, but it is not required to be a valid, working, or corporate-issued email address.
B. The username is less than 80 characters: The maximum length for a username is 80 characters. A username that is less than this limit is valid and would not cause an error.
C. The Username is a fake email address: Similar to option A, the username only needs to follow the structure of an email address; its validity as a receivable email account is not a requirement for the username field.

References:

1. Salesforce Help Documentation, "Add a Single User":
Section: User Fields, Username
Content: "Enter a unique username for the user. The username must be in the format of an email address, for example, jane@salesforce.com. The username must be unique across all Salesforce orgs." This directly supports that uniqueness is the critical factor.
2. Salesforce Help Documentation, "Guidelines for Adding Users":
Section: Usernames
Content: "A username must be unique across all Salesforce organizations. The username must be in the format of an email address... It doesn't have to be the user's actual email address." This

confirms that the username's uniqueness is global and that it doesn't need to be a real email address, invalidating options A and C.

3. Trailhead, "User Management" Module, "Add Users" Unit:

Section: Usernames and Aliases

Content: "Every user has a username, which is unique across all Salesforce organizations. The username must be in the format of an email address (jsmith@example.com), but it doesn't have to be a real email address." This reinforces the principles of global uniqueness and format over validity.

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Question: 14

The DreamHouse Realty team has a master-detail relationship set up with open house as the parent object and visitors as the child object.
What type of field should the administrator add to the open house object to track number of visitors?

A. Roll-up Summary.

B. Multi-select Picklist

C. Cross-object formula field

D. Indirect lookup

Answer:

A

Explanation:

A Roll-up Summary field is the correct choice because it is a feature specifically available on the master object in a master-detail relationship. It is designed to aggregate data from child records. In this scenario, it can be configured to perform a COUNT of the child (visitor) records and display the total on the master (open house) record, directly fulfilling the requirement to track the number of visitors.

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Why Incorrect Options are Wrong:

B. Multi-select Picklist: This field type allows users to select multiple values from a predefined list on a single record; it cannot aggregate data from related records.
C. Cross-object formula field: A cross-object formula field displays data from a parent record onto a child record. It cannot aggregate data from child records onto a parent.
D. Indirect lookup: An indirect lookup is a specialized relationship type used to link a child external object to a parent object and is not applicable here.

References:

1. Salesforce Help Documentation: Create a Roll-Up Summary Field. This document states, "A roll-up summary field calculates values from related records, such as those in a related list... You can create a roll-up summary field to display a value in a master record based on the values of fields in a detail record." It explicitly lists COUNT as one of the available roll-up types.
2. Salesforce Trailhead: Data Modeling Create Object Relationships. In the unit "Work with Schema Builder," it explains, "On a master-detail relationship, you can create roll-up summary fields. A roll-up summary field is a field on the master record that performs a calculation on the detail records."
3. Salesforce Developer Documentation: Object Relationships Overview. Under the

"Master-Detail Relationship" section, it lists "Roll-up summary fields" as a key feature, describing them as fields that "allow you to define calculations that are performed on the child records and displayed on the parent record."

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Question: 15

The administrator at Cloud kicks deleted a custom field but realized there is a business unit that still uses the field.
What should an administrator take into consideration when undeleting the field?

A. The field needs to be re-added to reports.

B. The field history will remain deleted.

C. The field needs to be restored from the recycle bin.

D. The field needs to be re-added to page Layouts.

Answer:

A

Explanation:

Undeleting a custom field restores the field, its data, and most metadata references. However, any saved reports that previously displayed the field lose that column when the field was deleted, so the administrator must edit those reports to add the column back. Page-layout references, field history, and other metadata are automatically reinstated when the field is undeleted from the Deleted Fields list of the object.

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Why Incorrect Options are Wrong:

B. Field-history tracking is automatically restored with the field; it does not remain deleted.
C. Custom fields are undeleted from an object's Deleted Fields list, not from the Recycle Bin (which stores records, not metadata).
D. Page-layout references are automatically re-established; the field doesn't have to be manually re-added to layouts.

References:

1. Salesforce Help: "Delete and Erase Custom Fields Undelete Custom Fields," Summer '24, para. 2 ("Page-layout references are restored; you must manually add the field to reports, list views, and search layouts as needed").
2. Salesforce Help: "Considerations for Deleting Custom Fields," Summer '24, bullet "Field history tracking is restored when you undelete a field."
3. Salesforce Help: "Recycle Bin Overview," Summer '24, para. 1-2 (Recycle Bin stores records, not setup metadata such as custom fields).

Question: 16

An administrator needs to create a one-to-many relationship between two objects with limited access to child records.
What type of field should the administrator use?

A. Roll-up summary

B. Master-detail field

C. Cross Object formula

D. Lookup field

Answer:

B

Explanation:

A Master-Detail relationship is the correct choice as it creates a tightly coupled one-to-many relationship where the security and sharing settings of the child (detail) record are inherited directly from the parent (master) record. This means a user's access to the child record is limited by and dependent on their access to the parent. The child record does not have its own owner or separate sharing rules, fulfilling the requirement for a relationship with inherently limited access to child records controlled by the parent.

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Why Incorrect Options are Wrong:

A. Roll-up summary: This is a field that aggregates data from child records to a parent record; it is not a type of relationship itself but a feature of a Master-Detail relationship.
C. Cross Object formula: This is a formula field that pulls data from a related object to display on another. It does not create the relationship or control record access.
D. Lookup field: This creates a loosely coupled one-to-many relationship where the parent and child records have independent owners and separate sharing settings, which is contrary to the requirement.

References:

1. Salesforce Help Documentation, "Overview of Relationships": "In a master-detail relationship, the detail record inherits the sharing and security settings of its master record. If a user has access to the master record, they also have access to the detail records." This directly confirms that access to the child is limited by the parent.
2. Salesforce Help Documentation, "Relationship Considerations": Under the Master-Detail section, it states, "Detail and subdetail records inherit the sharing settings from the master record." Conversely, for Lookup relationships, it notes, "The two objects in a lookup relationship have their own sharing settings."

3. Trailhead, Salesforce Platform Basics Module, "Data Modeling" Unit: "In a master-detail relationship, the security settings of the detail record are inherited from the master record. It's a tight bond between two objects." This official courseware explicitly links the Master-Detail relationship type to inherited, and thus limited, security.

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Question: 17

Northern trail Outfitter wants to use contract hierarchy in its or to display contact association. What should the administrator take into consideration regarding the contact hierarchy?

A. Contacts displays in the contact hierarchy are limited to record-level access by User.

B. Contact Hierarchy is limited to only 3,000 contacts at one time.

C. Customizing hierarchy columns changes the recently viewed Contacts list view.

D. Sharing setting are ignored by contacts displayed in the Contact Hierarchy.

Answer:

A

Explanation:

The Contact Hierarchy view adheres to the Salesforce security and sharing model. A user viewing the hierarchy will only see the contact records to which they have at least read access. This is a critical consideration for an administrator, as it ensures that data visibility remains consistent with the organization-wide defaults, role hierarchy, and any sharing rules that have been configured. The hierarchy does not bypass or ignore these fundamental record-level access settings.

Why Incorrect Options are Wrong:

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B. Contact Hierarchy is limited to only 3,000 contacts at one time.
This is factually incorrect. The documented limit for the number of contacts displayed in the hierarchy is 2,000.
C. Customizing hierarchy columns changes the recently viewed Contacts list view.
These are two distinct and independent user interface components. Customizing the columns for the Contact Hierarchy page does not alter the standard "Recently Viewed Contacts" list view.
D. Sharing setting are ignored by contacts displayed in the Contact Hierarchy.
This is incorrect and contradicts a core principle of Salesforce data security. The Contact Hierarchy respects and enforces the sharing settings established for the user.

References:

1. Salesforce Help, View the Contact Hierarchy: "The hierarchy shows contacts that you have at least read access to. If you can't see a contact in the hierarchy, you don't have permission to view that contact." This directly supports the correctness of option A and the incorrectness of option D.
2. Salesforce Help, Guidelines for Using the Contact Hierarchy: "The contact hierarchy shows a maximum of 2,000 contacts." This reference confirms that the limit stated in option B is incorrect.
3. Salesforce Help, Customize the Contact Hierarchy Columns: This document details the process of modifying the hierarchy columns by editing the ContactHierarchyColumns field set on the Contact object. The documentation makes no mention of this action impacting any other list

views, thereby invalidating option C.

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Question: 18

The administrator at Ursa Major Solar has created a custom report type and built a report for sales operation team. However, none of the user are able to access the report.
Which two options could cause this issue?
Choose 2 Answers

A. The custom report type is in development.

B. The user's profile is missing view access.

C. The org has reached its limit of custom report types.

D. The report is saved in a private folder

Answer:

A, D

Explanation:

The inability of users to access a newly created report based on a new custom report type is typically caused by one of two common administrative oversights.
First, a custom report type must be in a 'Deployed' status for non-administrative users to run reports based on it. If it remains in the default 'In Development' status, only administrators and users with the "Manage Custom Report Types" permission can use it.
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Second, report visibility is controlled by folder permissions. If the administrator saves the report in their personal private folder (e.g., "My Personal Custom Reports"), it will not be visible to any other users by default, regardless of their profile permissions.

Why Incorrect Options are Wrong:

B. The user's profile is missing view access.
This option is too general. While missing access to the report's folder is a valid cause, options A and D represent more specific and primary failure points directly related to the creation of a new custom report and report type.
C. The org has reached its limit of custom report types.
Organizational limits on custom report types would prevent the administrator from creating a new report type. It would not affect users' ability to access an already existing report.

References:

1. Official Salesforce Documentation on Custom Report Type Status:
Source: Salesforce Help, "Set Custom Report Type Status"
Reference: The documentation states, "While a custom report type is in development, only administrators and users with the 'Manage Custom Report Types' permission can create and run

reports from it. When the report type is deployed, all users with access to the objects in the report type can use it." This directly supports option A.

2. Official Salesforce Documentation on Report Folder Sharing:

Source: Salesforce Help, "Share a Report or Dashboard Folder in Lightning Experience"

Reference: This guide explains that reports and dashboards are shared via folders. It details that items in private folders are not accessible to other users. The section "Considerations for Sharing Folders" implicitly supports option D by describing private folders as being inaccessible to others unless explicitly shared.

3. Official Salesforce Documentation on Report and Dashboard Folders:

Source: Salesforce Help, "Reports and Dashboards"

Reference: Under the "Organize Reports and Dashboards in Folders" section, it is clarified: "Your personal folders are private. To share reports or dashboards in a personal folder, save them to a shared folder." This confirms that saving a report in a private folder (Option D) makes it inaccessible to others.

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Question: 19

Sales raps at Ursa Solar are having difficulty managing deals. The leadership team has asked the administrator to help sales reps prioritize and close more deals.
What should the administrator and close more deals.

A. Einstein Lead Scoring

B. Einstein Search Personalization

C. Einstein Activity Capture

D. Einstein Opportunity Scoring

Answer:

D

Explanation:

Einstein Opportunity Scoring is designed specifically to address the challenge of prioritizing deals. It uses data science and machine learning to assign a score (1-99) to each opportunity, indicating its likelihood of being won. This score helps sales reps focus their time and effort on the deals with the highest probability of closing, directly supporting the leadership team's goal to "prioritize and close more deals." The scoring model analyzes past opportunity data and related factors to provide this predictive insight.

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Why Incorrect Options are Wrong:

A. Einstein Lead Scoring: This feature scores leads, not opportunities. It helps prioritize which leads to convert into accounts, contacts, and opportunities, which is an earlier stage in the sales process.
B. Einstein Search Personalization: This feature tailors search results to individual users. While it improves efficiency in finding records, it does not provide any predictive analysis to help prioritize deals.
C. Einstein Activity Capture: This feature automates the logging of emails and events to related Salesforce records. It provides a more complete view of customer interactions but does not score or rank opportunities for prioritization.

References:

1. Salesforce Help, Einstein Opportunity Scoring: "Give your sales team an easy way to prioritize opportunities so they can focus on the deals that are most likely to close... Each opportunity is given a score, from 1 to 99, which is available on opportunity records..."
2. Salesforce Help, How Einstein Opportunity Scoring Works: "Einstein Opportunity Scoring uses data science and machine learning to score your opportunities... Einstein builds a scoring model by analyzing your past opportunities, including custom fields and activity data."

3. Salesforce Help, Einstein Lead Scoring: "Einstein Lead Scoring helps your sales team prioritize leads so they can focus on the ones that are most likely to convert." (This confirms it applies to leads, not opportunities/deals).
4. Salesforce Help, Einstein Activity Capture: "Einstein Activity Capture helps keep data between Salesforce and your email and calendar applications up to date... Einstein logs the email and event activity to the activity timeline of related Salesforce records." (This confirms its purpose is data synchronization, not scoring).

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Question: 20

The administrator for AW Computing is working with a user who is having trouble logging in to salesforce.
What should the administrator do to identify why the user is unable to login?

A. Review the Security token.

B. Review the password history.

C. Review the Password policies.

D. Review the Login history

Answer:

D

Explanation:

The Login History page is the primary administrative tool for diagnosing user login problems. It provides a comprehensive audit trail of all login attempts to the organization. For each attempt, it records the user, source IP address, location, login time, and, most importantly, the status. If a login fails, the status column provides a specific reason, such as 'Invalid Password,' 'User Locked Out,' or 'Failed: Computer activation required.' This information allows the administrator to quickly and accurately identify the root cause of the user's inability to log in.

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Why Incorrect Options are Wrong:

A. Review the Security token.
A security token is only required for API access or when logging in from an IP address outside the organization's trusted IP ranges. It is not a general diagnostic tool.
B. Review the password history.
The password history tracks when a user's password was changed. It does not provide any information about login attempts or the reasons for login failures.
C. Review the Password policies.
Password policies are org-wide settings that define password requirements (e.g., length, complexity, expiration). Reviewing them does not explain a specific user's login failure.

References:

1. Salesforce Help Documentation, "Monitor Login History." This document details the fields available on the Login History page. It explicitly states, "The Status column shows whether the user successfully logged in. If the login failed, the status shows the reason, for example, Invalid Password or Login-As Not Enabled for Admin." This directly supports using Login History as the diagnostic tool.
2. Salesforce Help Documentation, "Troubleshoot Login Issues." In the section for administrators,

the first recommended step is to "Check the user's login history." This establishes it as the primary troubleshooting method. The guide states, "From Setup, in the Quick Find box, enter Login History, then select Login History... to see a list of login attempts."

3. Salesforce Security Guide, "Password Policies." This guide describes password policies as preventative security controls that "determine the requirements for user passwords." This confirms that policies are general settings, not logs for troubleshooting individual login events. (See section: "Set Password Policies").

4. Salesforce Help Documentation, "Reset Your Security Token." This document explains the purpose of a security token: "Salesforce requires a security token to log in to Salesforce from an external application or via the API." This clarifies that it is not relevant to all login scenarios.

CertEmpire

Question: 21

Once an opportunity reaches the negotiation stage at cloud kicks, The Amount fields becomes required for sales users. Sales managers need to be able to move opportunities inti this stage without
knowing the amount.
How should the administrator require this field during the negotiation stage for sales users but allow
their managers to make changes?

A. Make the field required for all users.

B. Create to formula field to fill in the field for managers.

C. Assign the administrator profile to the managers.

D. Configure a validation rule to meet the criteria.

Answer:

D

Explanation:

A validation rule is the standard declarative tool for enforcing conditional data integrity. It allows an CertEmpire administrator to define a formula that evaluates to true or false. In this scenario, the formula can check if the Opportunity StageName is 'Negotiation', the Amount is blank, and the current user's profile is 'Sales User'. If all conditions are met, the rule triggers an error message, preventing the record from being saved. This approach precisely targets the specific user group (Sales Users) and the specific record state (Negotiation stage), while allowing other users, like Sales Managers, to proceed without the restriction.

Why Incorrect Options are Wrong:

A. Making the field required for all users would prevent sales managers from saving the record without an amount, which contradicts the requirement.
B. A formula field calculates a read-only value based on other fields; it cannot be used to enforce data entry on a different field.
C. Assigning the administrator profile to managers is a significant security risk and violates the principle of least privilege for a minor requirement.

References:

1. Salesforce Help Documentation, "Validation Rules": "Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record... For example, you can have a validation rule that requires a user to enter a justification if they change an opportunity's amount by more than 10%." This establishes the purpose of validation rules for

conditional requirements.

2. Salesforce Help Documentation, "Validation Rule Fields": This document lists the available functions and global variables. The $Profile global variable can be used to check the current user's profile. The formula would look similar to: AND(ISPICKVAL(StageName, "Negotiation"), ISBLANK(Amount), $Profile.Name = "Sales User"). This shows how to combine record criteria with user criteria.

3. Trailhead, "Formulas and Validations" Module, "Create Validation Rules" Unit: "A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of 'True' or 'False'. Validation rules display an error message to the user when the formula returns a value of 'True'." This confirms the mechanism for enforcing the business logic described in the question.

CertEmpire

Question: 22

Northern Trail outfitters has hired interns to enter Leads into Salesforce and has requested a way to is identify these new records from existing Leads.
What approach should an administrator take to meet this requirement?

A. Set up Web-to-Lead form the interns use.

B. Define a record type and assign it to the interns.

C. Create a separate Lead Lightning App.

D. Update the active Leas Assignment Rules.

Answer:

B

Explanation:

The most effective approach is to create a specific record type, such as "Intern Lead," and assign it to the interns' user profiles. This ensures that any Lead record created by an intern is automatically categorized with this record type. Using a distinct record type allows for tailored page layouts, picklist values, and business processes for the interns. Most importantly, it provides a simple and reliable criterion (Record Type = "Intern Lead") for filtering list views, building CertEmpire reports, and creating dashboards to easily identify and manage the records they enter.

Why Incorrect Options are Wrong:

A. Set up Web-to-Lead form the interns use.
Web-to-Lead is designed to capture leads from an external website, not for internal users performing manual data entry within Salesforce.
C. Create a separate Lead Lightning App.
A Lightning App controls the user interface and navigation (e.g., which tabs are visible) but does not inherently categorize or tag the records created within it.
D. Update the active Leas Assignment Rules.
Lead Assignment Rules are used to automatically assign ownership of new leads to specific users or queues based on criteria, not to identify the source or type of the record.

References:

1. Salesforce Help - Create Record Types: "Record types let you offer different business processes, picklist values, and page layouts to different users. You might create record types to differentiate your regular sales deals from your professional services engagements, offering different picklist values for each." This directly supports using record types to differentiate records for different user groups.
2. Salesforce Help - Assign Record Types to Profiles: "After you create record types, you can

make them available to users by adding them to user profiles... When users create a record, they can choose a record type." By assigning only the "Intern Lead" record type to the interns' profile, it becomes their default, meeting the requirement.

3. Salesforce Help - Set Up Web-to-Lead: "Set up Web-to-Lead to capture registration information or product interest on your company's website and generate up to 500 new leads a day." This confirms Web-to-Lead is for external website capture.

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Question: 23

The Cloud kicks sales manager wants to boost productivity by providing insights at the start of each day.
Which three sales-specific standard Lightning components should administrator add to the homepage
to meet this requirement?
Choose 3 Answers.

A. Activities

B. Path

C. Assistant

D. Key Deals

E. Performance chart.

Answer:

C, D, E

Explanation:

To provide daily insights and boost productivity for a sales team, the administrator should use components designed to surface relevant, actionable sales information on the homepage.
1. Assistant (C): This component proactively displays personalized updates, such as new leads and opportunities requiring attention, helping users prioritize their day.
2. Key Deals (D): This component highlights top opportunities, ensuring sales reps focus on their most critical deals.
3. Performance Chart (E): This component visually tracks a user's sales performance against their goals (quota), providing immediate insight into their progress and motivating them.
These three components are standard, sales-specific, and designed to provide the requested daily insights directly on the Lightning homepage.

Why Incorrect Options are Wrong:

A. Activities: While the 'Today's Tasks' and 'Today's Events' components are useful for productivity, they are more of a to-do list than a source of sales-specific insights like the Assistant or Performance Chart.
B. Path: Path is a component used on a record page (e.g., an Opportunity or Lead) to guide a user through the stages of a business process. It cannot be placed on the homepage.

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References:

1. Salesforce Help Documentation - Standard Lightning Page Components:
Assistant: "The Assistant shows users important things they need to address, including new leads and opportunities that need attention." (Found under "Standard Component: Assistant").
Key Deals: "Help your sales reps keep their most important opportunities top of mind with the Key Deals component." (Found under "Standard Component: Key Deals").
Performance: "The Performance component shows sales performance against a goal for a specific period... Add it to a home page..." (Found under "Standard Component: Performance").
Path: "Use the Path component on object record pages..." This confirms Path is for record pages, not the homepage. (Found under "Standard Component: Path").

CertEmpire

Question: 24

What are three Setting an administrator should configure to make it easy for approvers to respond to approval requests?
Choose 3 Answers.

A. Update the organizations chatter setting to allow approvals.

B. Enable the organizations Email approval response setting.

C. Specify initial submission actions within the approval process.

D. Add the Items to approve component to the approvers home page.

E. Create a flow to automatically approve all records.

Answer:

A, B, D

Explanation:

To streamline the approval process for approvers, an administrator can configure several user-friendly features. Enabling "Allow Approvals in Chatter" lets users see and respond to approval requests directly within their Chatter feed. Activating "Email Approval Response" allows approvers to reply to notification emails with keywords like 'APPROVE' or 'REJECT' without logging into Salesforce. Lastly, adding the "Items to Approve" Lightning component to the approver's home page provides a centralized, visible list of all pending requests, enabling quick access and action. These three settings significantly reduce the steps required for an approver to respond.

Why Incorrect Options are Wrong:

C. Specify initial submission actions within the approval process.
Initial submission actions (e.g., locking a record) occur when a record is submitted, but they do not directly facilitate the approver's ability to respond.
E. Create a flow to automatically approve all records.
This eliminates the need for an approver to respond, which contradicts the goal of making it easier for them to respond.

References:

1. Salesforce Help, Let Users Respond to Approval Requests from Chatter: This document states, "Enable approvals in Chatter so that users can see approval requests in their Chatter feeds and respond to them without leaving the feed." This directly supports option A.
2. Salesforce Help, Set Up Email Approval Response: This guide explains, "Enable email approval response so that users can approve or reject approval requests by email, without having

to log in to Salesforce." This directly supports option B.
3. Salesforce Help, Standard Lightning Page Components: Under the "Items to Approve" component description, it states, "Shows a list of items waiting for the user's approval. Users can approve or reject items from their home page in Lightning Experience." This directly supports option D.
4. Salesforce Help, Configure an Approval Process: This document details the components of an approval process, clarifying that "Initial Submission Actions" are automated behaviors that occur when a record is submitted, not actions that simplify the approver's response interface. This supports the exclusion of option C.

CertEmpire

Question: 25

New Leads needs to be routed to the correct sales person based on the lead address.
How should the administrator configure this requirement?

A. Create formula field.

B. Use lead assignment rules.

C. Assign with an escalation rule.

D. Configure a validation rule

Answer:

B

Explanation:

The requirement is to automatically route new leads to a specific salesperson based on criteria, such as the lead's address. Salesforce's standard functionality for this is the Lead Assignment Rule. These rules are designed to trigger upon lead creation and evaluate the record against a set of defined criteria (e.g., City, State, or Country). If a lead's data matches a rule entry, it is automatically assigned to the specified user or queue, fulfilling the routing requirement.

Why Incorrect Options are Wrong:

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A. Create formula field: A formula field computes a value based on other fields. It cannot, by itself, assign a record to a user or queue.
C. Assign with an escalation rule: Escalation rules are exclusively for the Case object. They are used to reassign a case if it is not resolved within a specified time.
D. Configure a validation rule: A validation rule is used to enforce data integrity. It prevents a record from being saved if it does not meet certain criteria, but it does not perform assignments.

References:

1. Salesforce Help, "Set Up Lead Assignment Rules": "Assignment rules automate your organization's lead generation and support processes. Use lead assignment rules to automatically assign leads... For example, you can create a lead assignment rule that assigns leads with a specific country to a specific sales team." (Salesforce Documentation, Accessed 2023).
2. Salesforce Trailhead, "Automate Lead Management" module, "Set Up Lead Assignment Rules" unit: This unit provides a step-by-step guide on how to "Create lead assignment rules to make sure that leads are assigned to the appropriate sales reps." It uses examples based on geography (State/Province).
3. Salesforce Help, "Validation Rules": "Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record." This confirms its purpose is data integrity, not routing. (Salesforce Documentation, Accessed 2023).

4. Salesforce Help, "Set Up Escalation Rules": "Escalation rules automatically escalate cases when the case meets the criteria defined in the rule entry." This document explicitly states the feature is for the Case object. (Salesforce Documentation, Accessed 2023).

CertEmpire

Question: 26

An Administrator at DreamHouse Realty wants an easier way to assign an agent capacity and skill set. Which feature should the administrator enable to meet this requirement?

A. Knowledge Management.

B. Omni-Channel

C. Escalation Rules

D. Territory Management

Answer:

B

Explanation:

Omni-Channel is the Salesforce feature designed to manage and route various work items to the most qualified, available agents. It allows administrators to configure agent capacity, which defines the total amount of work an agent can handle at one time. Additionally, with skills-based routing, Omni-Channel can match the skills required for a work item (e.g., language, product expertise) to the skills assigned to an agent. This ensures that work is distributed efficiently to the right agent, directly addressing the need to assign capacity and skill sets.

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Why Incorrect Options are Wrong:

A. Knowledge Management is used to create and manage a repository of articles and information, not for routing work based on agent capacity or skills.
C. Escalation Rules automatically re-route cases that have not been resolved within a certain time frame, not for initial assignment based on agent skills.
D. Territory Management is primarily a sales feature used to structure and assign accounts to sales teams based on criteria like geography, not service agent skills.

References:

1. Salesforce Help, Omni-Channel for Administrators: "Omni-Channel is a comprehensive customer service solution that lets you route any type of incoming work item-including cases, chats, and leads-to the most qualified, available agents in your organization... You can also manage your agents' capacity to take on work items so that they're not over-assigned." (Found in the "What Is Omni-Channel?" section).
2. Salesforce Help, Set Up Skills-Based Routing: "Skills-based routing looks at the skills required to complete a work item and matches these to the skills that are assigned to an agent. Omni-Channel routes the work to the first agent who has the required skills and is available." (Found in the "Skills-Based Routing" overview section).
3. Salesforce Help, How Agent Capacity Works in Omni-Channel: "Capacity models determine

how much work agents can take on... When you use a status-based capacity model, you specify the agent capacity for each agent presence status." (Found in the "Agent Capacity" section).

CertEmpire

Question: 27

Universal container has a contact Lightning record Page with a component that shows LinkedIn dat
a. The sales team would like to only show this component to sales users when they are on their mobile phones.
Choose 2 Answers.

A. Filter the component visibility with User Profile name = sales User.

B. Filter the component visibility with Form Factor = phone

C. Filter the component visibility with view = Mobile/Tablet.

D. Filter the component visibility with User Role Name = Sales User.

Answer:

A, B

Explanation:

To meet the requirement, two distinct visibility filters must be applied to the Lightning component. First, to restrict visibility to a specific group of users, a filter based on a user attribute is needed. Filtering by User Profile Name = 'Sales User' correctly targets users assigned to that specific profile. Second, to restrict visibility based on the device, a filter on the form factor is required. The Form Factor = Phone filter ensures the component only appears when the page is viewed on a mobile phone. These two conditions are combined in the Lightning App Builder to control the component's visibility precisely as requested.

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Why Incorrect Options are Wrong:

C: The correct context for filtering by device type is 'Form Factor', not 'View'. The available values are 'Desktop' and 'Phone'.
D: While filtering by Role is a valid mechanism, Profile is the standard method for controlling a user's functional access and what they can see in the user interface.

References:

1. Salesforce Help Documentation: Dynamic Lightning Pages. This document outlines how to set component visibility filters. It explicitly states, "You can also base a filter on the viewing user's details, such as their profile or role... Use Device context to set a component to display exclusively when the page is viewed in a specific experience, such as a phone or a desktop." This supports using both Profile and Form Factor as filter criteria.
2. Trailhead by Salesforce: Lightning App Builder Module, Make a Record Page Dynamic Unit. This official training module provides a direct example of setting component visibility. It demonstrates using the filter User Profile Name to show a component only for a "Sales User"

profile and a separate example using Device Form Factor to show a component only on a "Phone". This confirms that options A and B are the correct methods.

CertEmpire

Question: 28

At cloud kicks sales reps use discounts on the opportunity record to help win sales on products. When an opportunity is won, they then have to manually apply the discount up the related
opportunity products. The sales manager has asked if three is a way to automate this time consuming
task.
What should the administrator use to deliver this requirement?

A. Flow Builder

B. Approval Process

C. Prebuild Macro.

D. Formula field

Answer:

A

Explanation:

Flow Builder is the appropriate declarative automation tool for this requirement. A record-triggered flow can be configured to launch automatically when an Opportunity record's stage is updated to 'Won'. The flow can then use a 'Get Records' element to find all related Opportunity Product records and an 'Update Records' element to iterate through them, applying the discount value from the parent Opportunity. This completely automates the cross-object field update from a parent (Opportunity) to its children (Opportunity Products) based on a specific trigger condition, eliminating the manual task for sales reps.

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Why Incorrect Options are Wrong:

B. Approval Process: This tool is designed for formal record submission and approval sequences, not for automating data synchronization between related records upon a field change.
C. Prebuilt Macro: Macros are user-initiated sets of instructions to automate repetitive tasks within the user interface. The requirement is for an automatic, backend process.
D. Formula field: A formula field can display a value from a parent record on a child record, but it cannot be used to actively update a separate, editable field.

References:

1. Salesforce Help, "Flow Builder": This document introduces Flow Builder as the primary tool for building declarative automations. It states, "Flow Builder can be used to build code-like logic without using a programming language... Automate a guided visual experience... Add more automation to your pages and apps... Start a process when a record is created or updated." This

directly supports using Flow for the described record-update trigger.
2. Salesforce Help, "Record-Triggered Flow": This resource details the specific flow type needed. It explains, "A record-triggered flow starts when a record is created or updated... Record-triggered flows can update any record in the database." This confirms its capability to update the related Opportunity Products when the Opportunity is updated.
3. Salesforce Help, "Considerations for Updating Records in Flows": Under the section for record-triggered flows, the documentation implicitly supports this use case by explaining how to update related records. For example, "To update records that are related to the record that triggered the flow, add an Update Records element." This is the exact action required.
4. Salesforce Help, "Formulas": This documentation clarifies the function of formula fields, stating they "calculate their values from other fields, expressions, or values," confirming they are for calculation and display, not for executing an update on another field.

CertEmpire

Question: 29

Dreamhouse Realty agents are double-booking open house event nights. The evet manager wants to event submission process to help agents fill in event details and request dates.
How should an administrator accomplish the request?

A. Create a workflow role to update the Event Date Field.

B. Create an approval process on the Campaign object.

C. Create a sharing rule so that other agents can view events.

D. Create a campaign for agents to request event dates.

Answer:

D

Explanation:

The most appropriate solution is to use the standard Campaign object. Campaigns are designed in Salesforce to manage marketing initiatives, including events like open houses. By creating a Campaign record for each event request, agents can use a standardized object to fill in details such as the event name, type, proposed dates, and status. This creates a formal submission record that can be viewed, reported on, and managed by the event manager to prevent scheduling conflicts and double-bookings.

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Why Incorrect Options are Wrong:

A. Create a workflow role to update the Event Date Field.
"Workflow role" is not a standard Salesforce feature. A workflow rule automates actions but does not provide a user interface for submitting a request.
B. Create an approval process on the Campaign object.
An approval process is for formally approving a submitted record. While useful, it is a secondary step; the primary need is a mechanism for the initial submission, which is creating the Campaign record itself.
C. Create a sharing rule so that other agents can view events.
A sharing rule controls record visibility. While this helps agents see existing events to avoid conflicts, it does not create the submission process for requesting a new event.

References:

1. Salesforce Help Documentation - Campaigns:
Source: Salesforce Help, "Campaigns"
Reference: The documentation states, "Manage all of your marketing initiatives, such as advertisements, direct mail, or conferences, with campaigns." This establishes the Campaign object as the standard and appropriate tool for managing events like open houses.

2. Salesforce Help Documentation - Approval Processes:
Source: Salesforce Help, "Set Up an Approval Process"
Reference: "An approval process automates how records are approved in Salesforce." This confirms that an approval process is a subsequent action taken on an existing record (like a Campaign), not the initial method for creating or submitting the request.
3. Salesforce Trailhead - Campaign Basics:
Source: Trailhead, "Campaign Basics" module, "Get Started with Campaigns" unit.
Reference: This module explains that Campaigns are used to "organize and track marketing efforts" and can represent a "specific marketing effort, such as an advertisement, direct mail, or conference." This directly supports using Campaigns for open house events.

CertEmpire

Question: 30

Cloud kicks intends to protect with backups by using the data by using the data export Service.
Which two considerations should the administrator remember when Scheduling the export?
Choose 2 Answers.

A. Metadata Backups are limited a sandbox refresh intervals.

B. Data Backups are limited to weekly or monthly intervals.

C. Data export service should be run from a sandbox.

D. Metadata backups must be run via a separate process.

Answer:

B, D

Explanation:

When planning a backup strategy using the Salesforce Data Export Service, an administrator must be aware of its specific capabilities and limitations. The service can be scheduled to run automatically, but only at weekly or monthly intervals, not daily. This scheduling frequency is a primary consideration. Furthermore, this service exclusively exports an organization's data (records). It does not include metadata, such as custom object definitions, page layouts, or Apex code. Therefore, a comprehensive backup plan requires a separate, distinct process for backing up the organization's metadata using tools like the Ant Migration Tool or Salesforce CLI.

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Why Incorrect Options are Wrong:

A. Metadata Backups are limited a sandbox refresh intervals.
This is incorrect. Metadata backup processes are independent of sandbox refresh schedules and are performed using different tools (e.g., Ant Migration Tool, Salesforce CLI).
C. Data export service should be run from a sandbox.
This is incorrect. The Data Export Service is intended to back up an organization's live production data. Running it in a sandbox would only back up test data.

References:

1. Salesforce Help, Article 000322136, "Export Backup Data from Salesforce": This document explicitly states the scheduling options. Under the "Schedule an Export" section, it details the process and notes, "You can schedule backup files to generate automatically at weekly or monthly intervals." This directly supports the correctness of option B.
2. Salesforce Help, Article 000323461, "Back Up and Restore Your Salesforce Data and Metadata": This article clarifies the distinction between data and metadata backups. It states, "The weekly data export service...does not include your org's metadata." It then recommends

using other tools for metadata, such as the "Ant Migration Tool," which confirms that metadata backup is a separate process (supporting option D).

3. Salesforce Metadata API Developer Guide, "Introduction": This guide describes the tools and processes for retrieving and deploying metadata. It outlines methods like the Ant Migration Tool and Salesforce CLI, which are entirely separate from the data-centric Export Service, reinforcing that metadata requires a different process.

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