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Salesforce Certified Administrator

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Version Demo

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QUESTION NO: 1

Ursa Major Solar wants its sales reps to be aware when they are speaking with high-profile customers.

Which two options should be added to the Lightning record pages to achieve this?

Choose 2 answers

A. Custom Component

B. Highlight Panel

C. Action and Recommendations

D. Component Visibility Filter

E. Rich Text Area

ANSWER: D E

Explanation:

Use a Rich Text Area component to place a prominent, tailored message directly on the Lightning record page, such as an alert identifying the customer as high-profile and providing any appropriate handling guidance. Rich text supports formatted text, allowing the administrator to make the notification highly visible to sales reps without requiring custom development.

Use a Component Visibility Filter to ensure that the alert is displayed only for the relevant customer records. For example, the visibility criteria can evaluate a field on the record, such as a High-Profile checkbox or customer-segment value. When the record meets that criterion, the rich-text alert is shown; otherwise, it remains hidden. This creates a contextual record-page experience and prevents an alert intended for high-profile customers from appearing on every account or contact record.

Salesforce Lightning App Builder supports configuring component visibility using record-field criteria, enabling admins to show targeted components on record pages. See Salesforce's component visibility documentation and the Lightning record page customization Trailhead module.

QUESTION NO: 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 between two custom objects is implemented with a third custom object, called a junction object. The junction object stores a record for each association between records in the two original objects. For example, if one custom object represents Projects and another represents Consultants, a junction-object record can represent one consultant being assigned to one project.

To configure this standard Salesforce relationship design, create a junction with a custom object, then create two master detail relationships on the new object. Each master-detail field on the junction object points to one of the existing custom objects. This lets a single record from either parent object relate to many junction records, while each junction record relates to one record from each parent. Salesforce then exposes related lists that allow users to view and manage the associated records from either parent record. The junction object can also contain its own fields, such as assignment date, role, quantity, or status, to describe the relationship itself.

For more detail, see Salesforce's Many-to-Many Relationships documentation and the Trailhead guide to object relationships.

QUESTION NO: 3

Universal Container wants to increase the security of their org by requiring stricker user passwords.

Which two of the following should an administrator configure?

Choose 2 answers

A. Password different then username

B. Prevent common words

C. Minimum password length.

D. Password complexity requirement.

ANSWER: C D

Explanation:

Salesforce administrators can strengthen user authentication through the org's Password Policies settings. **Minimum password length.** is a configurable policy that requires users to create passwords with at least the selected number of characters. Increasing this value makes passwords more resistant to guessing and brute-force attacks because it expands the possible combinations an attacker would need to attempt.

Password complexity requirement. is also a configurable password policy. It controls whether passwords must include a mix of character types, such as letters, numbers, and special characters. Applying a complexity requirement reduces the likelihood that users select simple, easily guessed passwords and helps establish a consistent password-security baseline across the organization. These controls are configured by navigating to Setup and opening Password Policies, where an administrator can select the organization's minimum length and required complexity level. Salesforce applies the selected policies when users set or reset their passwords, supporting stronger credential hygiene without requiring individual users to interpret security standards themselves.

For details, see Salesforce's Password Policies documentation and the Trailhead password security guidance.

QUESTION NO: 4

A user at Northern Trail Outfitters Is having trouble logging into Salesforce. The user's login history shows that this person has attempted to log in multiple times and has been locked out of the organization.

Which two ways should the administrator help the user log into Salesforce?

A. Log in as the user to unlock the user and reset the password.

B. Reset the password policies to allow the user to login.

C. Reset password on the user's record detail page.

D. Use the unlock button on the user's record detail page.

ANSWER: C D

Explanation:

“Use the unlock button on the user's record detail page” is required because repeated unsuccessful login attempts can lock a Salesforce user. An administrator can open the affected user’s record in Setup and select **Unlock** to remove the lockout status immediately. This restores the user’s ability to attempt authentication without waiting for the organization’s lockout interval to expire.

“Reset password on the user's record detail page” is also an appropriate administrative action. Resetting the password sends the user a password-reset email so they can establish a new password that meets the organization’s current password requirements. This is especially useful when the failed attempts resulted from an unknown, forgotten, or expired password. In practice, the administrator should unlock the account and reset the password so the user has both an active account and valid credentials for the next login attempt. Salesforce documents user-password administration and password resets in its Password Policies and Administration guidance, and user access management in the Manage Users documentation.

QUESTION NO: 5

An administrator at Cloud Kicks is building a flow that needs to search for records that meet

certain conditions and store values from those records in variable for use later in the flow.

What flow element should the administrator add?

A. Assignment

B. Get Records

C. Create Records

D. Update Records

ANSWER: B

Explanation:

Get Records is the appropriate Flow element because it queries Salesforce records using conditions the administrator defines, such as field values, operators, and filter logic. The element can retrieve either the first matching record or all matching records, depending on the flow’s requirements. Flow automatically stores the retrieved record data in a record variable or record collection variable, making the selected fields available for later elements in the flow. For example, a flow can use Get Records to find an Account associated with a Contact, then reference the Account’s fields in a Decision, Assignment, screen component, or subsequent record operation. Administrators can choose to store all fields or only selected fields, which supports efficient flow design when only specific values are needed. This is the standard declarative approach for locating existing Salesforce data and retaining it for reuse during the same flow interview. Salesforce documents Get Records as the element for finding records and storing their field values for use elsewhere in the flow. See Salesforce Help: Get Records and Trailhead: Get Records in Flow Builder.

QUESTION NO: 6

Northern Trail Outfitters has asked an administrator to ensure that when a contact with a title

of CEO is created, the contact’s account record gets updated with the CEO’s name.

Which feature should an administrator use to implement this request?

A. Quick Action

B. Workflow Rule

C. Process Builder

D. Validation Rule

ANSWER: C

Explanation:

Process Builder is the appropriate feature for this requirement in the context of the listed choices and the Salesforce Certified Administrator exam version. A process can run when a Contact record is created, evaluate criteria such as whether the Title field equals “CEO,” and then perform an immediate action that updates a field on the related Account record. The process uses the Contact’s Account relationship to identify which Account to update, and it can populate the Account’s CEO-name field with values from the Contact, such as the contact’s name. This provides the required cross-object automation without requiring custom code or user intervention.

For this type of automation, the administrator would configure the process to start when a Contact is created or edited, define criteria for the CEO title, and select an action to update the related Account. Salesforce’s Process Builder documentation describes its ability to automate record updates and invoke actions based on record criteria. See Salesforce Process Builder Overview. Although Salesforce now recommends using Flow Builder for new automation and provides migration guidance, Process Builder is the best answer among these exam options: Migrate Workflow Rules and Process Builder Processes to Flows.

QUESTION NO: 7

The sales manager at Cloud Kicks wants to set up a business process where opportunity discounts

over 30% need to be approved by the VP of sales. Any discounts above 10% need to be approved by the

user’s manager. The administrator has been tasked with creating an approval process.

Which are two considerations the administrator needs to review before setting up this approval process?

Choose 2 answers

A. Create a custom Discount field on the opportunity to capture the discount amount

B. Populate the Manager standard field on the sales users’ User Detail page.

C. Configure two separate approval processes.

D. Allow the submitter choose the approver manually.

ANSWER: A B

Explanation:

Create a custom Discount field on the opportunity to capture the discount amount is necessary because approval processes evaluate fields on the record being submitted. An Opportunity does not provide a standard header-level discount percentage field suitable for this requirement. A custom percentage field allows the administrator to define entry criteria and approval-step criteria for discounts above 10% and above 30%. The field must be populated before submission so the approval process can route the record correctly.

Populate the Manager standard field on the sales users’ User Detail page. is also required because an approval step can assign approval requests to the submitting user’s manager. Salesforce determines that manager from the Manager field on the user record. With this reporting relationship in place, the first approval step can route qualifying opportunities to the salesperson’s manager, while a subsequent step can route higher discounts to the VP of Sales. A single approval process can contain multiple steps and use step criteria to apply the appropriate escalation path.

For Salesforce guidance on approval routing and approval steps, see Salesforce Approval Processes and Trailhead: Approval Processes.

QUESTION NO: 8

AW Computing would like to improve its Case Lightning record page by including:

• A filtered component to display a message in bold font when a case is saved as acriticalrecord

type.

• A quick way to update the account status from the case layout.

Which two components should an administrator use to satisfy these requests?

Choose 2 Answers

A. Related List

B. Related Record

C. Record details

D. Rich text

ANSWER: B D

Explanation:

Rich text is the appropriate standard Lightning App Builder component for the conditional message. An administrator can add formatted text to the component, including bold styling, then use component visibility rules so it appears only when the Case meets the specified critical-record-type condition. This provides an on-page alert without requiring custom code or a separate field.

Related Record is the appropriate component for updating Account Status from the Case record page. Because Account is a parent record related through the Case Account field, the Related Record component can surface the Account record directly on the Case page. Users with the necessary field-level and record permissions can view and edit the Account fields, including Status, without navigating away from the Case. The component can be configured to show selected fields and supports editing the related record in context, making it the direct fit for a quick Account-status update.

Salesforce documents that Dynamic Forms and Lightning record pages can use component visibility to control when components display: Dynamic Forms Overview. Salesforce also describes using the Related Record component to show a record related to the record being viewed: Lightning App Builder Components.

QUESTION NO: 9

Cloud Kicks has a custom object named shoe. The administrator has been asked to ensure that when

a relationship is created between Account and shoe to prevent orphaned shoe records.

What should the administrator do to complete this requirement?

A. Create an indirect lookup

B. Create an encrypted lookup

C. Create a hierarchical lookup

D. Create a master-detail relationship.

ANSWER: D

Explanation:

Create a master-detail relationship between Account and shoe. In Salesforce, a master-detail relationship establishes a strong parent-child dependency: every shoe record must be associated with an Account record. Salesforce does not allow a user to save a detail record without its master record, which directly prevents shoe records from existing without an associated account. This is the appropriate relationship type when the business requirement is to ensure that related child records are never orphaned.

The relationship also makes the shoe record dependent on the Account for ownership and sharing behavior. Shoe records inherit the owner and sharing settings of their related Account, helping keep access management consistent with the parent

record. In addition, deleting an Account deletes its related shoe records, preserving the intended dependency throughout the record lifecycle. Before creating the relationship, the administrator should confirm that the shoe object has no existing records without an Account value, because Salesforce requires all existing detail records to have a master record when converting or establishing this relationship. Salesforce documents these dependency and inheritance characteristics in its relationship considerations and object relationship guidance.

QUESTION NO: 10

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:

"Back-up the Shoe Style values in existing records." and "Change the field type from a multi-select picklist field to a picklist field." are the appropriate steps. A multi-select picklist permits a user to store several selections in one field, whereas a standard picklist permits one selected value. Therefore, converting the Shoe Style field to the picklist field type directly enforces the requirement that users select only one style for each record.

Before making the conversion, the administrator should export or otherwise preserve the existing record data. Multi-select values are stored as multiple selections, and records that currently contain more than one Shoe Style cannot retain multiple choices once the field is a single-select picklist. A backup lets the administrator review affected records, determine which value should remain where needed, and restore or correct business data after the conversion. This is a prudent data-management practice whenever a field-type change can alter how existing values are represented.

Salesforce documents supported custom-field data types and field metadata in the Salesforce Metadata API Field Types documentation. For general guidance on configuring fields and preserving data quality, see the Salesforce Data Modeling Trailhead module.

QUESTION NO: 11

The IT manager at universal Containers is doing an audit of the systems security.

Mow should the administrator provide a summary of the org's security health?

A. Change the Organization-Wide Default to private to restrict visibility.

B. Turn on Event Monitoring to track user events.

C. Download the last six months of user login data.

D. Run a Health Check to identify vulnerabilities.

ANSWER: D

Explanation:

Run a Health Check to identify vulnerabilities. Salesforce Health Check provides an at-a-glance assessment of an organization's security posture by comparing selected security settings against a Salesforce baseline, such as the Salesforce Baseline Standard. It produces an overall health score and identifies settings that are potential risks, enabling the administrator to review areas such as password policies, session settings, network access, and other security controls in one consolidated assessment. The administrator can use the report to communicate the org's current security health to IT leadership and can download the results for audit documentation or remediation planning. Health Check also supports creating or using a custom baseline when the organization has security standards beyond Salesforce's recommended baseline. This makes it an appropriate tool for a security audit that requires a concise, actionable summary rather than a record-level access change or a log of individual activity. For implementation details and the available baselines, see Salesforce Help: Health Check. Salesforce's broader guidance on evaluating and strengthening org security is available in the Salesforce Trailhead Health Check module.

QUESTION NO: 12

Cloud Kicks needs to change the owner of a case when it has been open for more than 7 days.

How should the administrator complete this requirement?

A. Auto - Response Rules

B. Validation Rule

C. Escalation Rule

D. Assignment Rule

ANSWER: C

Explanation:

Escalation Rule is the appropriate automation because it is designed to take action when a case remains open beyond a defined amount of time. An administrator can create a case escalation rule with criteria identifying the applicable cases, then add an escalation action that runs after 7 days. That escalation action can automatically reassign the case to a specified user or queue, ensuring that aging cases receive attention without requiring manual monitoring.

Escalation rules also support business-hours-based timing, which lets Cloud Kicks decide whether the seven-day threshold should reflect all elapsed time or only its defined support hours. The rule can optionally send notification emails to the new owner or other recipients at the same time that ownership changes. Salesforce evaluates open cases against active escalation rules and executes the configured escalation action once the case reaches the specified age. This makes escalation rules the purpose-built, declarative case-management feature for reassignment based on how long a case has been open. See Salesforce's Case Escalation Rules documentation and Set Up Escalation Rules guidance.

QUESTION NO: 13

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:

The available for input checkbox was unchecked. In Flow Builder, the Debug dialog exposes only flow variables that have been configured to accept an input value. Selecting *Available for input* on a variable makes that variable available to the caller of the flow and also lets an administrator supply a value for it when launching a debug run. This is particularly useful when testing different paths in a screen flow, such as supplying a record ID, a value used by a decision, or data needed before the first screen appears. If the variable exists in the flow but is not marked as available for input, Flow Builder does not list it in the debug-run input area, so it can appear to be missing even though it remains usable internally by the flow. The administrator should open the variable resource, enable *Available for input*, save the flow, and run Debug again. Salesforce documents variable availability settings in its Flow resource reference and describes using the Debug feature to test flows with input values. See Salesforce Flow Variable Resources and Debug Flows.

QUESTION NO: 14

Cloud Kicks (CK) needs a new sales application. The administrator there is an application package on the AppExchange and wants to begin testing it in a sandbox to see If it addresses CK's needs.

What are two considerations when installing a managed package in a sandbox?

Choose 2 answers.

A. Any metadata changes to the package have to be recreated in production.

B. The installation link has to be modified to test.salesforce.com.

C. Install for Admins Only will be the only Install option available.

D. The package will be removed any time the sandbox is refreshed.

ANSWER: B D

Explanation:

To install an AppExchange managed package into a sandbox, the administrator must use the sandbox login endpoint. This means changing an installation URL that ordinarily uses `login.salesforce.com` to `test.salesforce.com`, then authenticating with the sandbox credentials. This directs the package installation to the intended sandbox rather than the production org. Salesforce's package-installation guidance describes using the appropriate login environment when installing a package: Salesforce Developers: Installing Packages.

A package installed solely for evaluation in a sandbox is not retained when that sandbox is refreshed. A refresh replaces the sandbox contents with a copy of the source production org's configuration and data, so the sandbox-only package installation is removed. The administrator should therefore plan to reinstall the package after a refresh if continued testing is needed, and should document any evaluation configuration that must be recreated. Salesforce explains the replacement behavior and refresh process in its Sandbox Refresh documentation.

QUESTION NO: 15

Brokers at DreamHouse Realty need to see certain information about one or more cases when referencing the contact record. This record case Name, Case ID, Customer Name, Case Reason, Case Status, and Case Creation Date.

Which two changes in Setup should the administrator make?

A. Use the page layout editor to change the related list type to Enhanced List.

B. Edit the Related List component in the Lightning App Builder and choose Related List as the related list type.

C. Edit the Related List component in the Lightning App Builder and choose Enhanced List as the related list type.

D. Use the page layout editor to include the appropriate column in the Cases related list.

ANSWER: A D

Explanation:

Use the page layout editor to change the related list type to Enhanced List and use the page layout editor to include the appropriate column in the Cases related list. Related lists on a record page are configured from the parent object's page layout—in this case, the Contact page layout. The administrator can open the Cases related list properties from that layout and select the Enhanced List type. Enhanced related lists provide a more useful tabular presentation for users who need to review multiple related records, including sorting and a broader set of displayed fields. In the same related-list properties area, the administrator selects and orders the Case fields that brokers need to review, such as the case identifier, customer/contact information, reason, status, and created date. These layout settings control the columns presented for the Cases related list when brokers view a Contact record, allowing the requested case details to be visible without opening each individual case. Salesforce documents that page layouts control related-list configuration and that administrators can customize the fields shown in related lists. See Customize Related Lists and Customize Page Layouts.

QUESTION NO: 16

Cloud kicks want to give credit to Opportunity team members based on the level of effort

contributed by each person toward each deal.

What feature should the administrator use to meet this requirement?

A. Stages

B. Splits

C. Queues

D. List Views

ANSWER: B

Explanation:

Splits is the appropriate feature because Opportunity Splits lets an administrator distribute credit for an opportunity among the members of its opportunity team. Salesforce supports revenue splits, which allocate a percentage or currency amount of the opportunity revenue, and overlay splits, which provide credit without reducing the revenue credited to other contributors. This enables Cloud Kicks to represent each person's relative contribution to a deal—for example, assigning a larger share to the primary salesperson and smaller shares to supporting specialists or account team members. Split percentages can be managed directly on the opportunity, and the resulting allocation is available for reporting, helping sales leadership measure individual contribution and compensation-related credit accurately. The administrator must first enable the relevant split types in Setup, after which users can add and manage split records for opportunity team members. This design specifically addresses credit allocation by level of effort while retaining a shared-team sales process. See Salesforce's Opportunity Splits documentation and the Trailhead module on opportunity teams and splits for setup and usage details.

QUESTION NO: 17

Cloud Kicks wants to try out an app from the AppExchange to ensure that the app meets its needs.

Which two options should the administrator suggest?

Choose two answers

A. Test Drive in a production org.

B. Download into a Trailhead Playground.

C. Install in a sandbox.

D. Check edition compatibility.

ANSWER: B C

Explanation:

Download into a Trailhead Playground. and **Install in a sandbox.** provide isolated environments where Cloud Kicks can evaluate an AppExchange package without introducing package components, configuration changes, or sample data into its live production organization. A Trailhead Playground is a separate Salesforce environment that can be used to install and explore compatible AppExchange packages, making it useful for an initial hands-on review. An administrator can validate the app's user experience, objects, fields, permissions, and general functionality there before considering a broader evaluation.

A sandbox is a copy or test environment associated with the company's Salesforce organization. Installing the app in a sandbox supports more realistic testing because administrators can evaluate how the package behaves alongside the organization's configuration and, depending on sandbox type, representative data. This enables testing of setup requirements, automation interactions, access controls, and business processes before any production deployment decision is made. Salesforce recommends using sandbox environments for development and testing, while Trailhead Playgrounds are specifically designed as safe environments for learning and experimentation. See Salesforce's guidance on Sandboxes and Trailhead's overview of Trailhead Playground Management.

QUESTION NO: 18

The administrator are Cloud Kicks created a new field for tracking returns on their new cloud shoe. A

user has submitted case to the administrator indication that the new field is unavailable.

Which two steps should an administrator do to troubleshoot this issue?

Choose 2 answers

A. Ensure that the page layout for the user's profile has been updated.

B. Run the setup audit trail for the organization.

C. Update the organization wide default for the object.

D. Review the field level security of the field for the user profile

ANSWER: A D

Explanation:

Ensure that the page layout for the user's profile has been updated and review the field level security of the field for the user profile. In Salesforce, a field can be available to a user only when both its field-level security and its placement on the applicable page layout support access. Field-level security controls whether a field is visible to users in a profile or permission set. If the field is hidden through field-level security, users will not be able to view it regardless of whether it was added to a page layout. The administrator should verify that the affected user's profile, or any applicable permission set, grants visibility to the new returns-tracking field. Salesforce also displays record fields according to the page layout assigned to the user's profile and the relevant record type. Therefore, after confirming visibility, the administrator should check that the field was added to the page layout actually assigned for the affected user and record type. These two checks address the primary configuration layers that determine whether a newly created field appears on a record page. For details, see Salesforce's field-level security documentation and page layout documentation.

QUESTION NO: 19

The Client services and customer support teams share the same profile but have different

permission sets. The Custom Object Retention related list needs to be restricted to the client services teamon the Lightning record page layout.

What should the administrator use to fulfil this request?

A. Sharing settings

B. Page Layout Assignment

C. Component Visibility

D. Record Type Assignment

ANSWER: C

Explanation:

Component Visibility is the appropriate feature because it lets an administrator control whether a component on a Lightning record page is displayed to a particular set of users. In Lightning App Builder, the related list can be selected as a component and assigned visibility criteria based on user attributes, including whether the running user has a specified custom permission. Since the two teams use the same profile but have different permission sets, the administrator can create or use a custom permission, include that custom permission in the permission set assigned to the client services team, and configure the related-list component to appear only when that custom permission is enabled for the current user. This provides targeted interface access without requiring separate profiles or changing record-level access. The criterion is evaluated when the user opens the record page, so client services users see the Custom Object Retention related list while the page remains appropriately tailored for customer support users. Salesforce documents Lightning component visibility and its available filters in the Lightning App Builder component visibility guidance. Custom permissions are designed for granting access through permission sets and can be used in visibility conditions, as described in the Custom Permissions overview.

QUESTION NO: 20

The administrator at DreamHouse Realty added an email quick action to the Case page layout

and is unable to see the action on the case feed.

Which feature must be enabled to ensure the quick action will be displayed as expected?

A. Email Notifications

B. Email-to-Case

C. Email Alerts

D. Email Templates

ANSWER: B

Explanation:

Email-to-Case must be enabled. Salesforce uses Email-to-Case to support email correspondence associated with Case records, including the email publisher action that users access from a Case feed. After Email-to-Case is enabled in Setup, an administrator can include the Email action in the Case page layout's Salesforce Mobile and Lightning Experience Actions section or, where applicable, the feed action configuration. Users with access to the Case can then compose an outbound email from the record, and Salesforce records that communication in the Case activity/feed context. This feature also establishes the Case email handling framework required for replies and other email processing related to support cases. Enabling it is therefore the required organization-level step when the Email quick action is not available as expected on Case records. Salesforce's Email-to-Case documentation describes how the feature manages email messages associated with cases, while the quick-action documentation explains that actions must be configured on the appropriate page layout for users to access them. See Salesforce Help: Email-to-Case and Salesforce Help: Create Quick Actions.

QUESTION NO: 21

Sales users at Universal Containers are reporting that it is taking a long time to edit opportunity

records. Normally, the only field they are editing is the Stage field.

Which two options should the administrator recommend to help simplify the process?

Choose 2 answers

A. Add a path for stage to the opportunity record page.

B. Use a Kanban list view for Opportunity.

C. Configure an auto launched flow for Opportunity editing.

D. Create a simplified Opportunity page layout.

ANSWER: A B

Explanation:

Add a path for stage to the opportunity record page. is appropriate because Salesforce Path presents the Opportunity Stage values as a guided visual process directly on the record. A user can select the next stage without opening the full edit experience, and the administrator can configure stage-specific guidance and key fields to support consistent progression. This focuses the user interaction on the field that sales users update most often.

Use a Kanban list view for Opportunity. is also appropriate because Kanban groups Opportunity records into columns based on a picklist field such as Stage. Sales users can move an opportunity from one stage to another by dragging its card to the relevant column, making frequent stage updates fast and highly visible. Kanban also gives users an at-a-glance view of pipeline distribution while preserving an efficient way to update the underlying Stage value. Together, Path supports focused updates from an individual record, while Kanban enables rapid updates across multiple opportunities from a list-view workflow. Salesforce documents Path setup at Salesforce Path Overview and describes working with Kanban views at Kanban Overview.

QUESTION NO: 22

An analytics user at Cloud Kicks needs Read, Create, and Edit access for objects and Should

be restricted from deleting any records.

What should the administrator do to meet this requirement?

A. Assign the standard System Administrator profile to the analytical user.

B. Give the user View all access and assign them to the highest role in the role hierarchy.

C. Create and assign a custom profile with Delete access removed for each object.

D. Create and assign a permission set that includes Read, Create, and Edit access

ANSWER: C

Explanation:

Create and assign a custom profile with Delete access removed for each object. Object permissions in a Salesforce profile define the baseline actions a user can perform on each object, including Read, Create, Edit, and Delete. An administrator can configure the custom profile so that Read, Create, and Edit are enabled while Delete remains disabled for every relevant object. This directly enforces the stated requirement: the analytics user can view existing records, add records, and update records, but cannot delete them.

A custom profile is appropriate because it establishes the user's core permissions rather than attempting to grant a set of permissions on top of a more permissive baseline. The administrator should also ensure that the user has the necessary record-level access through organization-wide defaults, roles, sharing rules, teams, or manual sharing, as applicable. Those sharing mechanisms determine which records the user can access, while the profile's object permissions determine whether the user can read, create, edit, or delete those records. Salesforce documents object-level permissions and profile configuration in its Profiles documentation and its user permissions documentation.

QUESTION NO: 23

The marketing team wants a new picklist value added to the Campaign Member Status field for

the upsell promotional campaign.

Which two solutions should the administrator use to modify the picklist field values?

Choose 2 answers

A. Add the Campaign Member Statuses related list to the Page Layout.

B. Edit the picklist values for the Campaign Status in object Manager.

C. Mass modify the Campaign Member Statuses related list.

D. Modify the picklist value on the Campaign Member Statuses related list

ANSWER: A D

Explanation:

Add the Campaign Member Statuses related list to the Page Layout. is appropriate because Campaign Member Status values are maintained at the individual Campaign level. The Campaign record's related list provides the interface through which an administrator can view and manage the statuses available to members of that campaign. Making this related list available on the Campaign page layout ensures the administrator can access the status-management controls from the relevant upsell campaign.

Modify the picklist value on the Campaign Member Statuses related list is also correct because a new member status is created directly for the applicable Campaign through its Campaign Member Statuses related list. Campaign Member Status is not configured as a standard object-level picklist in Object Manager with one universal set of values. Instead, each campaign can have its own member-status values, such as Sent, Responded, or a campaign-specific upsell status. This campaign-level configuration lets the marketing team track the proper response stage for members of the upsell promotion while preserving statuses tailored to other campaigns.

Salesforce describes creating and managing member statuses from the campaign's related information in its Campaign Member Statuses documentation. See also Salesforce's Campaign Basics Trailhead module for guidance on defining campaign member statuses.

QUESTION NO: 24

The administrator has been asked to automate a simple field update on the account. When a

support agent changes the status of the account to 'Audited', they would like the system to

automatically update the Audited date field on the account with today's date.

Which tool should the administrator use to complete this automation?

A. Approval process

B. Formula Field

C. Flow Builder

D. Validation Rule

ANSWER: C

Explanation:

Flow Builder is the appropriate tool because a record-triggered flow can run whenever an Account is updated and evaluate whether its Status value changed to *Audited*. The flow can then update the same Account record's Audited Date field using the current date, such as the `$Flow.CurrentDate` global variable. This creates a stored date value at the time the qualifying status change occurs, which is important because the field needs to retain the date on which the account became audited rather than continuously recalculate over time. An administrator can configure the flow to run only when the record is updated to meet the condition, helping ensure the date is populated at the intended transition. Record-triggered flows are Salesforce's primary declarative automation tool for actions that occur when records are created or changed, including updating fields on the triggering record. Salesforce documents record-triggered flows and their entry conditions at Record-

Triggered Flows. Global variables available in Flow Builder, including the current date, are described in the Flow Global Variables reference.

QUESTION NO: 25

Users at Cloud Kicks are reporting different options when uploading a custom picklist on the

Opportunity object based on the kind of opportunity.

Where Should an administrator update the option in the picklist?

A. Fields and relationships

B. Related lookup filters

C. Record Type

D. Picklist value sets

ANSWER: C

Explanation:

Record Type is the correct place to update which custom picklist values users can select when the available choices need to differ by the kind of Opportunity. In Salesforce, record types can represent distinct business processes or classifications, such as different Opportunity categories. For each record type, an administrator can control the values available for a picklist field, including which values are active and the default value presented to users creating records with that record type. This configuration lets one group of users see a tailored set of Opportunity picklist choices while another group sees values appropriate to its own process, without creating separate fields. To make the update, the administrator opens the Opportunity object's record type, locates the relevant picklist field in the record type's picklist settings, and adjusts the available values for that record type. Salesforce documents that record types determine the picklist values available to users, as well as the page layouts they see. See Salesforce Help: Record Types and Salesforce Help: Define Picklist Values for Record Types.

QUESTION NO: 26

The administrator at Clod Kicks updated the custom object Event to include a lookup field to the

primary contact for the event. When running an event report, They want to reference fields from the

associated contact record.

What should the administrator do to pull contact fields into the Custom report?

A. Configure formula fields on event to populate contact information

B. Edit the custom Event report type and add fields related via lookup.

C. Create a new report type with event as the primary object and Contact as a related object.

D. Use a dashboard with filters to show Event and Contact data as requested.

ANSWER: B

Explanation:

Edit the custom Event report type and add fields related via lookup. A custom report type controls which records and fields are available to reports built from that report type. Because the custom Event record has a lookup relationship to Contact, the administrator can edit the report type's layout and expose fields from the related Contact record. Once those lookup-related fields are added to the report type, report builders can select them as report columns, use them for grouping, and apply filters where supported.

This approach keeps the Contact data live and relationship-based: each Event report row accesses the fields from the Contact currently referenced by its primary-contact lookup. It also makes the fields consistently available to users creating reports from the custom Event report type, without requiring separate data copies or manual maintenance. Salesforce supports adding fields from objects related through lookup relationships when customizing a report type's field layout. The administrator should open the custom report type, choose the option to edit its layout, locate the related Contact fields, and add the needed fields to the layout before saving.

For Salesforce guidance, see Salesforce Trailhead: Custom Report Types and Salesforce Help: Report Types.