

# Salesforce

## Exam Questions Plat-101

Salesforce Certified Platform Foundations



#### NEW QUESTION 1

Sales reps at Get Cloudy Consulting want to see a visual representation of their emails and phone calls with a contact. Which contact record component must be present so users can see this?

- A. Activity Capture
- B. Salesforce Inbox
- C. Activities Timeline

**Answer: C**

#### NEW QUESTION 2

To which Team should a Salesforce associate be added to gain access to an Account and its related opportunities?

- A. Opportunity Team
- B. Lead Team
- C. Account Team

**Answer: C**

#### NEW QUESTION 3

Get Cloudy Consulting (GCC) wants to ensure the Annual Revenue field is a positive amount and does not exceed \$100. What should GCC use to ensure opportunities meet these standards?

- A. Validation Rules
- B. Assignment Rules
- C. Default Values

**Answer: A**

#### NEW QUESTION 4

A manager can see all of the records owned by their team, but not records owned by other teams. How is access to the records being controlled?

- A. Permission Sets
- B. Profiles
- C. Role Hierarchy

**Answer: C**

#### NEW QUESTION 5

Get Cloudy Consulting gets 90% of its leads from trade shows. Sales reps create many lead records during these events, but they often forget to change the Lead Source field to Trade Show\*. What approach would improve data integrity for the Lead Source field?

- A. Create a validation rule requiring the Lead Source field to equal Trade Show\*.
- B. Make an assignment rule named Trade Show?? to only assign leads to sales reps.
- C. Set the default value of the Lead Source field to Trade Show??.

**Answer: C**

#### NEW QUESTION 6

Get Cloudy Consulting wants to confirm the data type of the Account Sources field on Account object. Which editing the Account, the Account Sources field has several predefined values that can be selected. Which type of field is Account Source?

- A. Picklist
- B. Formula
- C. Text.Area

**Answer: A**

#### NEW QUESTION 7

A sales manager at Get Cloudy Consulting wants a report that shows their top-selling product families by quantity.

- A. Group by opportunity stage > Filter by product family > Sum the total number sold
- B. Group by product family > Filter to show only Closed Won opportunities > Sum the total number sold
- C. Group by active products > Filter to show opportunities this year > Sum the quantity

**Answer: A**

#### NEW QUESTION 8

Get Cloudy Consulting trains its new employee in a partial sandbox named New Employee; An employee completes the training in the sandbox and is ready to sign in to the production org. However, an error message pops up indicating an invalid username or password. The employee is using their sandbox username and

password to sign in to production.  
What is needed to solve this error?

- A. Creating a new username for the production org
- B. Removin
- C. New Employee appendix from the sandbox username
- D. Creating a different password for the production org

**Answer: B**

**NEW QUESTION 9**

Get Cloudy Consulting plans to implement Agentforce to enhance their sales team's efficiency.  
Which activity does Agentforce support?

- A. Scheduling meetings with leads
- B. Prioritizing sales activities based on lead conversion likelihood
- C. Automating emails to leads at pre-defined times

**Answer: B**

**NEW QUESTION 10**

A Salesforce associate is using Global Search to find a record but does not remember the name of the record they want to find.  
What should the associate use to search for the record?

- A. List view for each object
- B. Object Manager
- C. Wildcards and operators

**Answer: C**

**NEW QUESTION 10**

A Salesforce associate wants to connect with other Salesforce associates in their local area.  
Which Salesforce resource allows them to network and collaborate with others based on role and location?

- A. Trailblazer Connect
- B. Salesforce Interest Groups
- C. Trailblazer Community Groups

**Answer: C**

**NEW QUESTION 13**

Get Cloudy Consulting (GCC) is currently tracking forecasting and revenue data in a spreadsheet and wants migrate this data to Salesforce.  
Which solution should GCC consider?

- A. Marketing Cloud
- B. CRM Analytics
- C. Sales Cloud

**Answer: C**

**NEW QUESTION 15**

The Health Department wants to gain more insight into its patient data than what Salesforce Dashboards can provide.  
Which Salesforce product should the department use?

- A. Experience Cloud
- B. CRM Analytics
- C. Health Cloud

**Answer: B**

**NEW QUESTION 19**

A salesforce associate at Get cloudy Consulting is configuring object access. The requirements are:  
Sales Manager must have the same access to Opportunities. Marketing managers must have the same access to Campaigns. What is the recommend approach to configuring their access?

- A. Sharing Sets and Manual Sharing
- B. Validation and Assignment Rules
- C. Profiles and Permission Sets

**Answer: C**

**NEW QUESTION 22**

A Salesforce associate tries to create a new user in a sandbox using Astro@getdoudy.org as the username and it fails.  
What is the problem with creating the Astro3getcloudy.org' username?

- A. Salesforce usernames must include the user's full name and be formatted like an email address.
- B. Salesforce usernames must be unique across all Salesforce orgs and that one is already in use.
- C. Salesforce usernames must be formatted like an email address with .com at the end.

**Answer: B**

**NEW QUESTION 27**

A Salesforce associate is working from a custom Contact list view and noticed key information is missing. What should they do to add the missing information?

- A. Edit sharing settings
- B. Select Fields to Display
- C. Edit list filters

**Answer: B**

**NEW QUESTION 32**

A marketing manager wants to make the Reason Lost field required on the opportunity when the stage is changed to Closed Lost. What should the Salesforce associate do to enforce this requirement?

- A. Make the field required on the page layout.
- B. Create a validation rule on the Opportunity object.
- C. Make the field universally required.

**Answer: B**

**NEW QUESTION 33**

An employee at Get Consulting recently changed their name and received a new username. Where should these changes be updated?

- A. Contact Record page
- B. User Record page from Setup
- C. User profile page

**Answer: B**

**NEW QUESTION 34**

An employee at Get Cloudy Consulting recently changed their name. They received a new email address. Where should these changes be updated?

- A. User Record page from Setup
- B. User Profile page
- C. Contact Record page

**Answer: A**

**NEW QUESTION 35**

Which Salesforce role produces data-driven solutions by eliciting, documenting, and examining requirements around organizational challenges?

- A. Business Analyst
- B. User Experience Designer
- C. Platform Developer

**Answer: A**

**NEW QUESTION 36**

Get Cloudy Consulting wants to group its contacts by Region for reporting. What data type should the Salesforce associate recommend for this new Region field?

- A. Multi-select picklist
- B. Picklist
- C. Text

**Answer: B**

**NEW QUESTION 38**

Get Cloudy Consulting is rolling out Salesforce to its organization. New users may have different access requirements based on department. What should be recommended to allow new users the correct access based on their department's requirements?

- A. Role Hierarchy
- B. Individual profiles
- C. Permission sets

**Answer: C**

**NEW QUESTION 41**

A Salesforce associate has received a request to create new users for a group of new employees. Where can the associate check the number of licenses available to be assigned to the new employees

- A. Salesforce Help
- B. Company Information
- C. User Management Settings

**Answer: B**

**NEW QUESTION 43**

Get Cloudy Consulting (GCC) provides consulting services to small and medium-sized business in the financial services space. GCC wants a solution for customer service where complaints can be logged through a web form and email. Which Salesforce solution should GCC use?

- A. Commerce Cloud
- B. Experience Cloud
- C. Service cloud

**Answer: C**

**NEW QUESTION 48**

Get Cloudy Consulting (GCC) wants to customize its Sales application's Home tab with additional components. Outside of the org, where should GCC's Salesforce associate go to collaborate with others on solutions that might resonate with GCC users?

- A. Explore documents In Help and Training.
- B. Ask a question In a Trailblazer Community Group.
- C. Search for modules in Trailhead.

**Answer: B**

**NEW QUESTION 51**

How can a report of all Accounts with Opportunities be created?

- A. Use the Accounts report type.
- B. Use the Accounts with Opportunities report type.
- C. Use the Opportunities report type.

**Answer: B**

**NEW QUESTION 53**

Where can a org's service status and performance degradation information be found?

- A. AppExchange portal
- B. Salesforce help
- C. Salesforce

**Answer: C**

**NEW QUESTION 54**

A Salesforce associate is preparing for a sales call and needs to review a specific report. What is the most efficient way to navigate there?

- A. Use the search bar in All Reports
- B. Use the Global search bar
- C. Use the search bar in All Folders

**Answer: B**

**NEW QUESTION 59**

A Salesforce standard profile end user is looking for specific information on an Opportunity record page. They are overwhelmed by the required scrolling to see the page.

What should the user do to simplify the page to see only what they want?

- A. Collapse detail sections.
- B. Remove activities.
- C. Change page layout assignment.

**Answer: A**

**NEW QUESTION 61**

Get Cloudy Consulting wants to group its contacts by region. On most records, this text field is blank or misspelled. Which action is recommended to ensure there is correct data for this field?

- A. Convert the Region field to a picklist field.
- B. Create a validation rule to enforce correct spelling.

C. Email users a list of region names with correct spelling.

**Answer:** A

**NEW QUESTION 64**

What is the maximum number of rows will display?

- A. 2,000
- B. 5,000
- C. 3,000

**Answer:** C

**NEW QUESTION 66**

Where can a Salesforce associate find information that provides a view of interactions with a contact?

- A. Activity Timeline
- B. Details Tab
- C. Contact History

**Answer:** A

**NEW QUESTION 67**

Get Cloudy Consulting (GCC) needs an environment to onboard new hires as well as develop, implement, and test new requirements. Which type of environment should OCC use?

- A. Sandbox
- B. Production
- C. Trailhead Playground

**Answer:** A

**NEW QUESTION 72**

Get Cloudy Consulting (GCC) wants to simplify its sales teams Account Record page with the following recommendations:

- Adding tabs
- Hiding components
- Making fields conditionally visible

Where should GCC's Salesforce associate go to draft these changes for review?

- A. Lightning App Builder
- B. Record Types
- C. Page Layouts

**Answer:** A

**NEW QUESTION 76**

A Salesforce associate is asked to share records about a carpool program with users. Which type of group should the associate create?

- A. Private Group(s)
- B. Public Group(s)
- C. A Queue

**Answer:** B

**NEW QUESTION 77**

A manager is creating a dashboard for their team and wants each team member to receive a copy of the dashboard results by email each week. What should the team members do to ensure they receive they weekly results?

- A. Like the dashboard.
- B. Subscribe to the dashboard
- C. Follow the dashboard

**Answer:** B

**NEW QUESTION 78**

A Salesforce associate wants to learn more about an app to see if it would be a good fit for a business need, but they are not a system administrator. Where can they learn more about the app?

- A. AppExchange
- B. Trailhead
- C. Global Search

**Answer:** B

**NEW QUESTION 80**

What is the maximum number of rows a report will display?

- A. 5,000
- B. 3,000
- C. 2,000

**Answer: B**

**NEW QUESTION 82**

Which Salesforce role should help companies increase campaign effectiveness, reengage inactive customers, and grow their customer base?

- A. Consultant
- B. Marketer
- C. Designer

**Answer: B**

**NEW QUESTION 86**

Cloud Kicks (CK) became a North American subsidiary of Get Cloudy Consulting (GCC).

What should the Salesforce associate do to show that GCC is part of the CK portfolio when creating the CK Account record?

- A. View account hierarchy and select Add Child Account.
- B. Select New on the child accounts related list.
- C. Add Get Cloudy Consulting to the Parent Account field

**Answer: C**

**NEW QUESTION 88**

Get Cloudy Consulting wants to implement an AI Agent with Agentforce. What is a feature of Agents?

- A. Hallucination prevention
- B. Toxicity detection
- C. Data retention

**Answer: A**

**NEW QUESTION 92**

A Salesforce associate is viewing information within a report and needs to export the data. Into which types of files can the report be exported?

- A. Word (.doc or .docx) or comma-separated values(.csv)
- B. Excel (.xlsx or .xls) file or comma-separated values (.csv)
- C. PDF (.pdf) or Excel (.xlsx or .xls)

**Answer: B**

**NEW QUESTION 94**

An organization wants to implement Salesforce into its business model. The requirements include:

- Operations management
- Program management
- Grantmaking
- Fundraising
- Marketing
- Engagement

Which cloud is preconfigured to handle all of these requirements?

- A. Analytics
- B. Experience
- C. Nonprofit

**Answer: C**

**NEW QUESTION 99**

A Salesforce associate is creating new user accounts for a new project management team. What will be the role of each new team member?

- A. End User
- B. Developer
- C. Builder

**Answer: A**

**NEW QUESTION 102**

What is one aspect of multi-tenant architecture?

- A. Costs more than single-tenant architecture

- B. Reserves resources per tenant
- C. Shares resources with other tenants

**Answer: C**

**NEW QUESTION 106**

What should the account owner at Get Cloudy Consulting use to learn the sum of the amount for each opportunity?

- A. The Opportunity related list
- B. A custom report type
- C. A Roll-Up Summary field

**Answer: C**

**NEW QUESTION 111**

Which tool creates a visual representation of objects and their relationships?

- A. App Launcher
- B. Object Manager
- C. Schema Builder

**Answer: C**

**NEW QUESTION 112**

Get Cloudy Consulting wants to implement AI Agents to assist with customer service. Where can Agents be deployed?

- A. Queues
- B. Chatter
- C. Slack

**Answer: C**

**NEW QUESTION 113**

A sales manager requests a report that shows total opportunity amounts grouped by:

- Small opportunities — Amount is less than \$50,000.
- Medium opportunities — Amount is between \$50,000 and 5100,000.
- Large opportunities — Amount is more than \$100,000.

How should the Salesforce associate create a field to show the amount as described above?

- A. Create a bucket field off of Amount,
- B. Create a custom field in Setup.
- C. Create a formula field off of Amount.

**Answer: A**

**NEW QUESTION 116**

Get Cloudy Consulting (GCC) wants to integrate its financial system with its Salesforce environment. After searching the AppExchange and reviewing documentation for its financial system. GCC did not find anything.

What should be used to build this integration?

- A. Commerce Cloud
- B. MuleSoft
- C. Financial Services

**Answer: B**

**NEW QUESTION 121**

A Salesforce associate recently relocated from Get Cloudy Consulting's San Francisco office to its new London office. The associate wants to change their work hours information in the Salesforce org to reflect their new time zone.

Which method is easiest to change these settings?

- A. Go to Settings -> Personal Information -> My Work Information
- B. Submit a case with Salesforce support
- C. Go to Setup -> Company Information -> Default Time Zone

**Answer: A**

**NEW QUESTION 123**

Get Cloudy Consulting wants to implement Salesforce within its sales and service divisions, and automate several processes that involve both.

Which approach should they explore first?

- A. Declarative
- B. Programmatic
- C. Third-party consulting services

**Answer:** A

**NEW QUESTION 124**

Which action(s) must be taken for Salesforce updates?

- A. Updates are automatic; nothing needs to be downloaded or installed.
- B. Updates require purchasing an updated license.
- C. Updates need to be downloaded with each release

**Answer:** A

**NEW QUESTION 125**

A Salesforce associate has been tasked with creating new fields on the Contact object and determining what type of field be used for each one. Where should the associate go to understand the differences between the data types?

- A. Salesforce Help
- B. Customer Support
- C. App Launch

**Answer:** A

**NEW QUESTION 129**

What type of relationship do Account and Contact objects have?

- A. Lookup
- B. Self
- C. Master-detail

**Answer:** A

**NEW QUESTION 134**

Get Cloudy Consulting (GCC) wants to migrate to Salesforce as its business continues to grow. GCC's needs include: Communicating available products and services to its prospective customers Improving its sales pipeline forecast and management quarterly revenue goals Offering support to customers through its website, consider for implementation?

- A. Service, Experience, and Marketing
- B. Commerce, Service, and Marketing
- C. Sales, Service, and Marketing

**Answer:** C

**NEW QUESTION 137**

Salesforce associate received a promotion and needs Edit access to fields on opportunity records across the organization. Which user setting need updating to allow Edit access?

- A. Queue
- B. Permission Set
- C. Public Group

**Answer:** B

**NEW QUESTION 142**

How can a user see only contacts from a specific city on the 'New This Week' list view without changing what other users see?

- A. Change the permissions so they can only see records from the specific city.
- B. Clone the list view with a new name, and filter by the specific c
- C. Build a private report for contacts that is filtered by the specific city.

**Answer:** B

**NEW QUESTION 144**

A Salesforce associate wants to update an opportunity record they just closed. Which relationship is standard as a Lookup field on an opportunity?

- A. Stage
- B. Account
- C. Quote

**Answer:** B

**NEW QUESTION 148**

Get Cloudy Consulting's dashboard shows all of the company's key performance indicators (KPIs) in one view. The company's Salesforce associate is asked to add functionality that allows the dashboard to show all the same KPIs for each of the regions. How should the associate add this functionality?

- A. Create new dashboards for each region.
- B. Add a Region filter to the dashboard.
- C. Use an analytics package from the AppExchange.

**Answer: B**

**NEW QUESTION 149**

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