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Question 1

Universal Containers wants to give sales managers the ability to quickly provide sign off on an Opportunity via the Opportunity record page when a sales rep

has discounted a deal by 20% to 30%.

Which two features should be used for this requirement?

Choose 2 answers

Options:

A- Validation Rule

B- Dynamic Actions

C- Schema Builder

D- Approval Process

Answer:

B, D

Explanation:

To facilitate quick managerial sign-off on discounted opportunities:

B . Dynamic Actions: Allows the display of specific actions on the Opportunity record page based on certain conditions, like the discount percentage.

D . Approval Process: Configures a formal sign-off process for records meeting specific criteria, such as discount ranges between 20% to 30%.

Steps to set up:

Configure an approval process for opportunities where the discount is between 20% and 30%.

Use Dynamic Actions to conditionally show the approval action directly on the Opportunity record page based on the discount percentage.

This setup allows sales managers to efficiently review and approve discounted deals directly from the Opportunity record page.

For guidance on setting up approval processes and dynamic actions, refer to Dynamic Actions in Salesforce.

Question 2

Question Type: **MultipleChoice**

Universal Container's sales reps can modify fields on an opportunity until it is closed.

The sales operations team has access to modify the Post-Close Follow-up Date and Post-Close Follow-up Comments fields after the opportunity is closed. After the

opportunity is closed, the rest of the fields are read only.

How should these requirements be met?

Options:

A- Use record types with field sets and restrict editing fields using field-level security.

B- Use field-level security on page layouts to restrict editing fields.

C- Use field-level security on page layouts with record types to restrict editing fields,

D- Use field-level security to mark fields as read-only on the Sales profile.

Answer:

C

Explanation:

To manage field editability based on the opportunity status:

C . Use field-level security on page layouts with record types to restrict editing fields. This combination allows for different layouts and editable fields based on the status of the record (e.g., closed or open).

Steps to implement:

Create or adjust record types for open and closed opportunities.

For each record type, create a specific page layout.

On the page layout for closed opportunities, set the majority of fields to read-only using field-level security, except for the 'Post-Close Follow-up Date' and 'Post-Close Follow-up Comments' fields.

Assign the appropriate page layouts to the respective record types.

Update profiles or permission sets to use these record types and page layouts accordingly.

This setup ensures that sales reps can modify fields only when the opportunity is open, and the sales operations team can edit specific fields after closure.

For more information on using record types and page layouts, check Salesforce's documentation on Record Types.

Question 3

Question Type: **MultipleChoice**

Cloud Kicks is implementing an approval process for opportunities that requires managers to approve all opportunities above $50,000 before they can be

marked as Closed Won.

Which two delivery methods can a manager utilize to respond to approval requests in the Salesforce mobile app?

Choose 2 answers

Options:

A- Home Screen

B- In-App Notification

C- Record Detail

D- Navigation Menu

Answer:

B, C

Explanation:

For managers to respond to approval requests for opportunities above $50,000 in the Salesforce mobile app:

B . In-App Notification: Managers receive notifications within the Salesforce mobile app when there is an approval request, allowing them to approve or reject directly from the notification.

C . Record Detail: Managers can access the approval request directly from the Opportunity's detail page in the mobile app, where they can review and respond to the request.

Steps to configure approval process notifications:

Navigate to Setup Approval Processes select the relevant approval process.

Ensure the process is active and configured to send notifications to approvers.

Managers need to have the Salesforce mobile app configured to receive notifications.

For best practices on managing approvals in Salesforce, see Approvals in Salesforce.

Question 4

Question Type: **MultipleChoice**

Which three standard component types are available in the Lightning App Builder?

Choose 3 answers

Options:

A- Plain text

B- Rich text

C- Filter list

D- Report details

E- Recent items

Answer:

B, D, E

Explanation:

In the Lightning App Builder, the following standard components can be used to enhance the functionality of Lightning pages:

B . Rich text: Allows the inclusion of formatted text, links, and images on a page.

D . Report details: Enables embedding of specific report details directly on a page.

E . Recent items: Displays a list of recently accessed items relevant to the user.

Steps to add these components:

Open the Lightning App Builder via Setup Edit Page or when creating a new Lightning page.

Drag and drop the Rich text, Report details, and Recent items components from the standard components section onto the page layout.

Configure each component as needed (e.g., selecting a specific report for the Report details component).

For more on using these components, refer to Salesforce's guide on Standard Lightning Components.

Question 5

Question Type: **MultipleChoice**

A business user wants a quick way to edit a record's status and enter a custom due date field from the record's feed in Salesforce Mobile App.

What should be used to accomplish this?

Options:

A- Custom action

B- Custom button

C- Custom quick access link

D- Custom URL formula Field

Answer:

A

Explanation:

To allow quick editing of a record's status and entering a due date from the record's feed in the Salesforce Mobile App:

A . Custom action. This option enables users to perform specific tasks directly from the record page in the Salesforce Mobile App, such as editing fields.

Steps to create a custom action:

Navigate to Setup Object Manager select the relevant object.

Click Buttons, Links, and Actions New Action.

Set Action Type to 'Update a Record'.

Configure the action layout to include the Status and Custom Due Date fields.

Add the action to the Salesforce Mobile layout.

This setup provides an efficient way for users to update key fields without navigating away from the record feed.

For detailed setup instructions, see Salesforce's documentation on Creating Quick Actions.

Question 6

At Ursa Solar Major, only users with the Outer Planets profile need to see

the Jupiter field on the Solar System object.

How should the app builder satisfy this requirement?

Options:

A- Classic encryption

B- Filtered view

C- Field-level security

D- Sharing rules

Answer:

C

Explanation:

To restrict visibility of the Jupiter field on the Solar System object specifically to users with the Outer Planets profile:

C . Field-level security (FLS). This allows the app builder to control access to fields based on user profiles.

Steps to set up field-level security:

Navigate to Setup Object Manager Solar System.

Select Fields & Relationships Jupiter field.

Click Field-Level Security.

For all profiles except Outer Planets, set the Visible option to unchecked, ensuring these users cannot see the field.

For the Outer Planets profile, check Visible to grant access.

This configuration ensures that only users with the Outer Planets profile can view the Jupiter field.

For more information on field-level security, check Salesforce's guide on Field-Level Security.

Question 7

Question Type: **MultipleChoice**

Universal Containers (UC) requires that all users specify a contract is sent on each Opportunity prior to marking it as "Closed Won". UC wants to be able to report on how many Opportunities have sent Contracts compared to how many have a missing contract when the Opportunities closed.

Which field type should an app builder configure to fulfill this requirement?

Options:

A- Text

B- Text Area

C- Picklise

D- Checkbox

Answer:

D

Explanation:

For tracking whether contracts have been sent for Opportunities:

D . Checkbox. This field type allows users to clearly indicate (Yes/No) whether a contract has been sent. This binary nature of checkboxes makes it simple to filter and report on Opportunities based on whether a contract was sent.

Steps to configure this field:

Navigate to Setup Object Manager Opportunity.

Click Fields & Relationships New Checkbox.

Define the field with a label (e.g., Contract Sent).

Set the default value to false (unchecked).

Add the field to the relevant page layouts.

This setup facilitates accurate reporting and ensures that opportunities cannot be marked as 'Closed Won' without indicating whether a contract was sent.

For guidance on creating fields, see Salesforce's documentation on Custom Field Creation.

Question 8

Question Type: MultipleChoice

Where can an app builder edit an existing app to add components to the utility bar?

Options:

A- App Menu

B- Lightning App Builder

C- App Manager

D- Lightning Record Page

Answer:

C

Explanation:

To add components to the utility bar of an existing app:

C . App Manager. This is where Salesforce apps are configured, including the utility bar which can house components like a chat tool, recent items list, or custom Lightning components.

Steps to edit an app's utility bar:

Navigate to Setup App Manager.

Locate the desired app and click on the dropdown next to it select Edit.

In the App Builder, navigate to the Utility Items tab.

Click 'Add' to include new components to the utility bar.

Configure the properties of the utility item as needed.

Save the app configuration.

For step-by-step instructions on modifying apps, see Salesforce's guide on Managing Apps in Lightning Experience.

Question 9

Question Type: **MultipleChoice**

Which two features can be used to allow users to access Flows?

Choose 2 answers

Options:

A- Quick Action

B- Approval Process

C- Flow Launcher

D- Apex

Answer:

A, C

Explanation:

To allow users access to Flows, Salesforce offers multiple integration points:

A . Quick Action: Flows can be initiated from record pages, the app utility bar, or global actions using Quick Actions. This allows users to execute flows relevant to specific records or global processes.

C . Flow Launcher: A component available in Lightning App Builder that enables users to start flows directly from a Lightning page.

Steps to set up these features:

For Quick Actions, navigate to Setup Object Manager select object Buttons, Links, and Actions New Action Action Type (Flow).

For Flow Launcher, navigate to Lightning App Builder select the page drag the Flow component to the desired section of the page configure it to launch the specific flow.

For more information on integrating Flows, check the Salesforce documentation on Flow Distribution.

Question 10

Ursa Major Solar (UMS) uses Cases to track customer complaints, an Issue__c object to represent known problems with its solar panels, and a

Case_Issue__c junction object to relate known problems to customer complaints.

Periodically, UMS conducts audits which require the auditing users to view Case _Issue__c records.

Which access levels must be configured to allow UMS users to access Case _Issue_c records?

Options:

A- Read-Only access or issue_c and_issue_c

B- Read-Only access of Case issue =

C- Read Only access on Case and case_issue__o

D- Read-Only access on Case and issue__c

Answer:

D

Explanation:

To ensure auditing users can access records in the Case_Issue__c junction object, the correct data permissions on related records must be established:

D . Read-Only access on Case and Issue__c. Users need read-only access to both Case and Issue__c objects to view associated Case_Issue__c junction object records properly. This is because access to junction object records in Salesforce is determined by the user's access levels to the parent records in a relationship.

Steps to configure access:

Navigate to Setup Profiles or Permission Sets.

Select the profile or permission set of the auditing users.

Under Object Settings, adjust the permissions for Case and Issue__c to at least 'Read-Only'.

Ensure that users have visibility to the Case_Issue__c object itself.

This configuration allows users to view the details of cases and issues as they audit the junction object records.