Salesforce Certified Associate

Time Remaining : 01:09:40

1 of 40. Two users in the same opportunity record are seeing different fields.

What is the reason for this?

A. ◯ The missing fields are marked as hidden in Object Manager.
B. ◯ The users are assigned different profiles and page layouts.
C. ◯ The users have been configured with different Locales.

B

2 of 40. A Salesforce associate deletes an Account of a company that recently went out of business.

Which other related records are automatically deleted?

A. ◯ Any related leads
B. ◯ Any related cases
C. ◯ Any related opportunities

C

3 of 40. Which tool creates a visual representation of objects and their relationships?

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

C

☐ Mark this item for later review.

4 of 40. Get Cloudy Consulting's growing marketing team is on a custom profile named 'Marketing Team.' The team currently has Read access to leads and opportunities. Two marketing managers need Edit access on leads.

What should the Salesforce associate do to grant them the access they need?

A. ◯ Create a permission set that grants Edit access to leads and assign it to the marketing managers.
B. ◯ Create a permission set that grants Edit access to leads and assign it to the marketing team.
C. ◯ Create a new profile that grants Edit access to leads and assign it to the marketing managers.

A

☐ Mark this item for later review.

5 of 40. Get Cloudy Consulting requires a value in the Status field every time a record is created or edited.

What should they do to enforce this?

A. Make the field required in Object Manager.

B. Make the field required with a validation rule.

C. Make the field required in organization-wide defaults.

A

Mark this item for later review.

6 of 40. A Salesforce associate has been asked to identify all contacts that have had interactions with their company in the last year.

What should the associate do to identify these contacts?

A. Look at the contact's Last Modified Date.

B. Look at the Active field.

C. Look at the last related activity date.

C

Mark this item for later review.

7 of 40. When a sales rep needs to give an additional discount for an opportunity, a manager needs to review and authorize the discount request.

What should be used to lock the record before a decision is made?

A. Validation rule

B. Approval process

C. Page layout

B

Mark this item for later review.

8 of 40. 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

C

Mark this item for later review.

9 of 40. Get Cloudy Consulting gets 90% of its business 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 should help the sales reps when they create these lead records?

A. Make an assignment rule named 'Trade Show' to only assign leads to sales reps.

B. Format a validation rule requiring the Lead Source field to equal 'Trade Show'.

C. Change the default value of the Lead Source field from 'Web' to 'Trade Show'.

B

Mark this item for later review.

10 of 40. 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

C

Mark this item for later review.

11 of 40. 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.

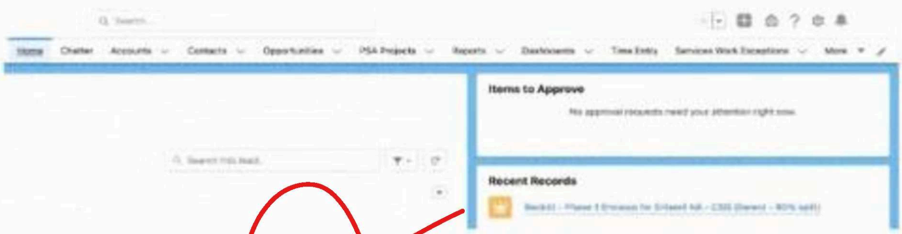
What should the user do to simplify the page to see only what they want?

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

A

Mark this item for later review.

12 of 40. Refer to the screenshot that shows the Home page.



A Salesforce associate wants to reorder items in their instance so the Reports tab appears immediately after Home.

What should the associate do to customize the items on the navigation bar?

A. Select the personalization button (pencil icon), then click and drag the item name up or down to adjust its location.
B. Use the downward arrow next to each item name, then select Move to move the item left or right.
C. Click the Setup gear icon at the top right of the page, then select User Interface and then Tabs.

A

13 of 40. 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

B

Mark this item for later review.

14 of 40. A Salesforce associate wants a visual summary of opportunities in a list view. The associate would like to summarize, filter, and move opportunities along the pipeline.

What should they do to meet this requirement?

A. Create an Opportunity Summary report.
B. Create an Opportunity List View.
C. Create an Opportunities Kanban View.

C

15 of 40. Get Cloudy Consulting (GCC) wants to simplify its sales team's 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

A

16 of 40. 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

C

☐ Mark this item for later review.

17 of 40. 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

C

18 of 40. A Salesforce associate at Get Cloudy Consulting is working with a user to view multiple records and their related records on the same screen. Currently, the user uses multiple browser tabs.

Which app should the associate recommend for the user to view multiple records and their related records on one screen?

A. Salesforce Lightning Page
B. Salesforce Lightning Console
C. Salesforce Dashboard

B

19 of 40. A Salesforce associate wants to add a new related list of cases to Account.

Where should the associate go to add the related list to Account?

A. ◯ Account Record page

B. ◯ Page Layout

C. ◯ Case Record page

B

☐ Mark this item for later review.

20 of 40. 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 city.

C. ◯ Build a private report for contacts that is filtered by the specific city.

B

☐ Mark this item for later review.

21 of 40. Salesforce is built on objects like Account, Contact, and Opportunity.

What is a representation of an object?

A. ◯ A spreadsheet where the records are rows and the fields are columns

B. ◯ Physical visualization of an Account, Contact, or Opportunity

C. ◯ A set of relationships that link an Account, Contact, or Opportunity

A

☐ Mark this item for later review.

22 of 40. 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

B

☐ Mark this item for later review.

23 of 40. 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. Experience

B. Analytics

C. Nonprofit

C

24 of 40. 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

A

Mark this item for later review.

25 of 40. A nonprofit organization wants to help ensure residents in their area receive health checkups. The nonprofit also wants to ensure resident tracking history and all data are stored in a way that complies with local privacy laws.

Which Salesforce cloud solution should help meet these needs?

A. Health Cloud

B. Service Cloud

C. Nonprofit Cloud

A

Mark this item for later review.

26 of 40. Get Cloudy Consulting (GCC) has recently been onboarded as a Salesforce customer. GCC wants to enroll its in-house IT administration team in a Salesforce instructor-led training workshop.

Which resource provides virtual and in-person learning that should help the team accelerate their Salesforce knowledge?

A. Trailhead Community

B. Salesforce Help

C. Trailhead Academy

A

27 of 40. Get Cloudy Consulting (GCC) plans to migrate from a legacy CRM system to Salesforce. GCC currently uses a dedicated single-tenant, on-premise system and wants to utilize a multi-tenant architecture like Salesforce uses.

What is one feature of multi-tenant architecture?

A. Resources are shared but tenants cannot claim each other's resources.

B. Resources are shared and tenants can claim each other's resources.

C. Resources are limited to each tenant.

A

28 of 40. Get Cloudy Consulting wants to evaluate a new feature that requires a specific license before purchasing.

Which environment should be used?

A. ◯ Developer org

B. ◯ Developer sandbox

C. ◯ Scratch org

A

29 of 40. 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

C

☐ Mark this item for later review.

30 of 40. Get Cloudy Consulting (GCC) currently supports its customers via calls and emails. GCC wants to meet the needs of digitally savvy customers by offering support via web chat as well as SMS, Facebook Messenger, and WhatsApp.

Which Salesforce product should meet this need?

A. ◯ Service Cloud

B. ◯ Experience Cloud

C. ◯ Sales Cloud

A

31 of 40. 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

B

32 of 40. Which Trailhead feature should Get Cloudy Consulting use to create a custom learning path for its employees?

A. ◯ Projects

B. ◯ Trailmixes

C. ◯ Modules

☐ Mark this item for later review.

B

33 of 40. A Salesforce associate tries to create a new user in a sandbox using 'Astro@getcloudy.org' as the username and it fails.

What is the problem with creating the 'Astro@getcloudy.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.

B

☐ Mark this item for later review.

34 of 40. Which sharing type shares a single, common infrastructure and code base?

A. ◯ Metadata
B. ◯ Multitenant
C. ◯ Trust

B

☐ Mark this item for later review.

35 of 40. A Salesforce associate at Get Cloudy Consulting needs a list of all active contacts grouped by Account.

What is the first step in building this report?

A. ◯ Create a new report using the Contacts & Accounts report type.
B. ◯ Create a Contacts report with a filter on Account.
C. ◯ Create a joined report with accounts and contacts.

A

☐ Mark this item for later review.

36 of 40. 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.

B

37 of 40. What is the maximum number of rows a report will display?

A. ◯ 5,000
B. ◯ 3,000
C. ◯ 2,000

C

☐ Mark this item for later review.

38 of 40. 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 $100,000.
- 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.

A

39 of 40. How should a Salesforce associate ensure a dashboard has the most current data?

A. By refreshing the browser

B. By clicking refresh

C. By opening the dashboard

Mark this item for later review

B

40 of 40. A Salesforce associate wants to refresh a report and email it to an executive team each week.

Which functionality of Salesforce Reports should the associate use?

A. Refresh

B. Notifications

C. Subscriptions

C