Quizlet Salesforce Admin 201

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1. **The Call Center Manager has requested that you add the ability for Service Reps to manually grant access to Cases to other Salesforce users. What Security and Access feature would you use to fulfill this requirement?**

   Sharing Setting

   Org Wide Default

   Manual Sharing

   Sharing Rule

   C

2. **The Chief Marketing Officer needs to see the daily response rate for campaigns, and wants to track this historically, in order to monitor trends over time. What analytics feature in Salesforce would you use to satisfy this request?**

   Line Graph

   Summary Report

   Pie Chart

   Reporting Snapshot

   D

3. **The Director of IT alerts you late in the day that another Salesforce administrator in your organization has abruptly left the company. This departing administrator's user account cannot be deactivated, because they are tied to several key dashboards as the running user, they are tied to several scheduled reports that are delivered daily, and they have several other core settings in the system that will take time to reassign to you. You need to prevent this departing administrator from being able to log in to Salesforce, as quickly as possible. What can you do to fulfill this request, without deactivating the departing administrator's user account?**

   A- None of the above - You have to de-activate the departing administrator's user account

   B- Monitor the departing administrator's User Account to see if they try to log in

   C- Freeze the departing administrator's user account

   D- Change the departing administrator's Role

   E- Assign a Read-Only Profile to the departing administrator.

   C

4. **The Director of Sales has asked for a change to the Opportunity Stages that are available to users. New opportunities are worked by Junior Sales Reps, who should only be granted access to the first three Stages (Stage 1, 2 and 3) on Opportunity records. The new requirement calls for only Senior Sales Reps to have access to the final two Opportunity Stages (Stage 4 and Stage 5), as they are the ones tasked with closing the deals once an opportunity has completed the first three stages. How would you meet this requirement?**

   Create two separate Sales Process and two Opportunity Record Types.

   Use Field Level Security to restrict access to the final two Opportunity Stages from the Junior Sales Reps.

   Create a Validation Rule to prevent a Junior Sales Rep from setting the Opportunity Stage to

   Create tow different Opportunity Page Layouts and assign one to Junior Sales Reps and one to Senior Sales reps.

   A

5. **How can a user relate an Opportunity to a Campaign? (select 2)** **Install an App off of the AppExchange that provides this functionality.** **Select it from the Campaign Hierarchy.** **Specify the Primary Campaign Source on the Opportunity** **Add the Campaign in the Campaign Influence related list on the Opportunity**	C, D
6. **How do you determine if a User's account has been Frozen?**	Go to their User Detail page and see if the Unfreeze button is displayed
7. **In Activity Management, what is the Salesforce feature that allows users to request meetings with customers, and lets customers select when they can meet, before organizers confirm meeting times?** **Task** **Activity** **Cloud Scheduler** **Event**	C
8. **In a Master-Detail relationship, what happens to Detail records when the Master record is deleted?** **All Detail Records are also deleted.** **Nothing. All detail records remain intact.** **The system prevents you from deleting Master records if there are any corresponding Detail records.**	A
9. **In your Administrator job with Universal Containers, you have found that the Company Information screen in the Company Profile section of Salesforce displays important information regarding your Salesforce organization. Which of the following are items that are accessible and displayed from the Company Information screen in Salesforce? (select 3)** **AppExchange Installations** **Feature Licenses used and remaining, such as Marketing User, Knowledge User etc...** **None of the Above** **User Licenses used and remaining, such as Service Cloud, Salesforce Platform etc...** **Your Salesforce Organization ID**	B, D, E
10. **The IT Director has mandated that all records in Salesforce must be backed up weekly. Which Data Management tool can be used to meet this requirement?** **Scheduled Report** **None. Salesforce cannot be backed up** **Force.com IDE** **Data Export**	D

11. **On which object is a Master-Detail Relationship established?** B

Master Object

Detail Object

None of the above

Junction Object

12. **The Operations Director has requested that each time a new Opportunity is won, a custom Survey object record is created and related to the Account that the Opportunity belongs to. Which Workflow Automation tool can accomplish this in Salesforce?** D

Assignment rule

Workflow Rule

Escalation Rule

Process Builder

Explanation
The Process Builder is able to Create a Record, and this option is available as an Action Type. Workflow Rules do not have as an available action to create a new record - the only 4 actions available from Workflow Rules are Field Update, Email Alert, Task Creation and Outbound Message. Both Escalation Rules and Assignment Rules cannot create new records, but deal with assigning and changing ownership of existing records, such as Cases.

13. **To help prevent duplicates, Salesforce provides Standard Matching Rules for which objects? (select 3)** A, B, E

Contacts

Accounts

Opportunities

Cases

Leads

14. **True or False: A Lookup Relationship cannot be established between an object and itself, such as a Lookup Field to Contact on the Contact object.** F

15. **True or False: Content Packs created in Salesforce CRM Content can be distributed to colleagues in your organization and to leads and contacts outside of your organization?** T

16. **True or False: If you change a field from a field type of multi-select picklist to a picklist, existing data will potentially be lost.**	T Explanation True. If you have data records already in the system and a field has multiple selections, if you then change that field type to a single picklist, any data that had previously been selected for that field will be lost. Do not do this.
17. **True or False: Once you have set a Custom Fiscal Year for your Salesforce organization, it can be reverted back to a Standard Fiscal Year.**	F
18. **True or False: You cannot delete a custom field that is referenced by a Field Update**	T
19. **A user needs to be able to delete Cases in Salesforce. Which Security settings can accommodate this request? (select 2)** **Role** **Profile** **Permission Set** **Ip Ranges**	B, C
20. **A user reports they are no longer able to see a field on an Account record that they used to be able to see. What things should you check to troubleshoot why this field has disappeared for this user? (select 3)** **A- Check the Field Level Security of the field to see if it is now hidden for the user's profile** **B- Check the Page Layout Assignment for the Profile the user belongs to and determine if the assignment has changed.** **C- Check the Page Layout to see if the field has been removed** **D- The user is sadly mistaken. Blame them and do nothing.** **E- Check the user's Role in the Role Hierarchy to see if they no longer have access to the field.**	A, B, C

21. **Website visitors fill out a web-to-case form on your company's website to submit a new case. The Support Manager has requested that these cases be automatically assigned to one of three queues, based on the country in which the case submitter resides. What Service and Support feature can be used to fulfill this request?** A

Assignment Rules

Escalation Rules

Case Teams

Auto-Response Rules

Explanation
Case Assignment Rules are used to automatically assign ownership of Cases, based on criteria that can be set. Escalation Rules can be used to change the owner to a different user or queue, based on time-based criteria. A Workflow Rule could be used, but isn't the ideal solution, because the owner of the case would initially be set, and then the case would have to be updated via the workflow rule and a field update to change the owner. You would also need 3 different Workflow Rules to accommodate this request, whereas with Assignment Rules, you would only have one assignment rule and you can have multiple evaluation criteria.

22. **What do you create in Salesforce to establish a many-to-many relationship between two objects?** B

Standard Object

Junction Object

External Object

Custom Object

23. **What Salesforce feature is used to send an email notification automatically for opportunities with large amounts?** C

Trigger

Process

Big Deal Alert

Flow

24. **What type of field would you add to a report to quickly categorize report records without creating a formula or custom field?** D

A- Summary

B- Matrix

C- Tabular

D- Bucket

25. **What types of scheduling does Salesforce support for Products, once scheduling has been enabled in an org? (Select 2)** A, C

Revenue Schedules

Report Schedules

Quantity Schedules

Workflow Schedules

Explanation
You can enable Quantity and/or Revenue Schedules in Salesforce for Products. Refer to https://help.salesforce.com/articleView?id=products_establish.htm&type=0 for more details.

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26. **When an object tab is invisible, what setting is it on?** C

Default Off

Default On

Tab Hidden

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27. **When creating a custom object, what are the two valid data type options for the Record Name field? (select 2)** B, C

Formula

Auto-Number

Text

Number

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28. **Which actions can be performed immediately from a workflow rule? (select 4)** A, B, C, D

Task Creation

Outbound Message

Email Alert

Field Update

Validation Rule

29.	**Which of the following are valid ways to make a field Read-Only? (select 2)** **Create a new field with a field type of Read Only.** **Override the standard page layout with a Visualforce Page, rendered as a PDF.** **Set the field to Read-Only in the FLS settings** **Set the field to Read-Only in the Page Layout.**	C, D Explanation You can edit a page layout and specify a field as Read-Only, or set the Field Level Security for the field to Read-Only. You actually can also create a Visualforce page that renders as a PDF and display Salesforce format as a Read-Only PDF, but this would make all fields on the page Read-Only, so that's taking things too far. There's no such field type as Read Only when creating a new field.
30.	**Which of the following components may be selected to display in a Home Page Layout. (select 4)** **Unresolved Items** **Dashboard Snapshot** **Items to Approve** **Calendar** **Tasks**	B, C, D, E
31.	**Which Security features in Salesforce can be utilized to grant Users access to specific Apps? (select 2)** **Permission Sets** **AppExchange** **Profiles** **Role Hierarchy** **Public Groups**	A, C

32. **Which statement about Record Types is true?**

Profiles can e assigned access to only one Record Type, per Profile

Users can only view records with a Record Type to which they have been granted access.

The Primary Record Type cannon be changed for a Profile, once it has been Specified.

Record Types can be used to define which values are available for users to select from picklists.

Explanation
When you edit a Record Type on an Object, the list of Picklist fields displays, allowing you to go in and select which values will be visible to users. If users complain of values missing from a picklist field, check the settings for the field under the Record Type.

D

33. **Which statement is true about Report Folders?**

A
B
C
D Users with the Manage Public Reports permission can create Report Folders

D

Explanation
The only way a System Administrator can get into another user's personal report folder is if they are able to log in as that user and then navigate into it, so they can't technically access a user's personal folder directly. You have to have the Manage Public Reports permission in order to create Report Folders. Other users cannot see each other's personal report contents.

34. **Which statement is true as it relates to checkboxes and field dependency?**

Checkboxes can be dependent fields but not controlling fields.

Checkbox fields can neither be controlling or dependent fields.

Checkbox fields can be controlling and dependent fields.

Checkboxes can be controlling fields but not dependent fields.

D

35. **Which statement is true regarding Record Types?**

Users are assigned a Default Record Type for each object they have access to.

Every Record Type has a corresponding page layout assignment for each Profile

Record Type assignments on a Profile determine which Record Types a user can use when creating or editing a record.

All of the above

Users can view records belonging to any record type: even those with a Record Type that has not been assigned to them.

D

Explanation
There is a lot of confusion surrounding Record Type assignments, and what that actually controls or grants access to. The main points to understand, as detailed in https://help.salesforce.com/articleView?id=permissions_record_type_access.htm&type=0 is this particular section - Users can view records assigned to any record type. As a result, a page layout is assigned to every record type on a user's profile. A record type assignment on a user's profile or permission set doesn't determine whether a user can view a record with that record type. The record type assignment simply specifies that the user can use that record type when creating or editing a record.

36. **Which statement is true when assigning a Task to a Group in Salesforce?**

The same task is assigned to all members of the group

You cannot assign a task to a group in Salesforce

Group tasks can only be created for personal groups.

Each member of the group is assigned a copy of the task.

Explanation
When you create a task in Salesforce, you can assign it to up to 100 people, including members of groups. These are individualized tasks for each user, which they can then edit, reassign, or delete from their individual tasks. Refer to https://help.salesforce.com/articleView?id=activities_multi_user_tasks.htm&language=en_US&type=0 for more information.

D

37. **Which statements are true as it relates to the Running User of a Dashboard in Salesforce? (select 2)**

The running users security settings will determine the data that is displayed.

The dashboard will only display for the user that is specified as the running user, and will be invisible to other users.

If a user drills down into a source report that the dashboard data is derived from, the report will display data based on the running user's security settings.

The running user can be changed on the dashboard view page by authorized users.

A, D

38. **Which statements are true regarding Public Groups? (select 2)** B, D

Public Groups are the same as Chatter Groups.

Public Groups can be specified when creating a Sharing Rule.

Public Groups can be created by any user in Salesforce.

Public Groups can be selected to manually share a record with.

39. **Which Support feature in Salesforce is used for a group of people to work together to resolve a case?** A

Case Team

Account Team

Chatter

Queue

40. **You are tasked with mass updating 200 lead records to change the Lead Source value on them. How can you perform these changes to all 200 records all at once? (select 2)** C, D

Create a workflow rule to force the update of the Lead Source field on the Lead records

Create a Process to update the Lead Source records.

Create a List View and set it to display 200 records at a time and then update all 200 Lead records via inline editing from the list view to make the update.

Export the Lead Records, update the Lead Source and then import the records back into Salesforce using the Data Loader tool.

Explanation
Workflow Rules and Processes could theoretically accomplish this, but you would have to perform some sort of edit on one record at a time in order for the Lead Source field to update on each. You could add a checkbox field on the Lead object called Update and mass-check that checkbox on the 200 records and then have the workflow or process fire based on that checkbox firing, followed by the action of the field update for the Lead Source, but that is more involved than just exporting using the Data Loader and then reimporting the update. The easiest way is via the List View option, as long as all of the Lead records have the same record type (you can't do mass inline editing from a list view if the records in the list view are of different record types).

41.	**You find yourself needing to delete a thousand Lead records that were imported in error. Which Data Management solution could you utilize to accomplish this? (select 2)** **Recycle Bin** **List Views** **Import Wizard** **Mass Delete Leads Link** **Data Loader** **Explanation** **The Data Loader can be used to Mass Delete records in Salesforce. Although the Data Import Wizard is able to work with Lead records, it can only be used to add, update or upsert (add and update at the same time) records and cannot be used for deletion purposes. The Recycle Bin is where records go when they are deleted, but can't be used to perform actual record deletions. You can Mass Delete records via a List View, but this requires a custom JavaScript button and all of the records in the List View have to be of the same record type - this isn't supported in Lightning Experience, either, so deleting via List Views is not the best option, although there is technically a more involved way to accomplish this. One final option is that there is a Mass Delete Leads link available to you from the Leads home page, when you click the Leads tab. That's probably the easiest way to mass delete Lead records.**	D, E
42.	**You have a time-based workflow action scheduled to fire tomorrow and it is visible in the Time-Based Workflow Queue. Which statement is true, if the criteria for this time-based workflow action is no longer valid once you update the record today?** **Nothing. The time-based workflow action will still display in the Time-Based Workflow Queue, and it will fire as originally scheduled tomorrow.** **A confirmation window displays, once you update the record, informing you that here is a pending action waiting in the Time-Based Workflow Queue. You will be prompted to either remove the action or allow it to remain via a Yes/No question.** **The time-based workflow action will be removed from the Time-Based Workflow queue and will no longer display, since the criteria for this action is no longer valid.**	C
43.	**You have been tasked with creating a report based on the relationships between a primary object and three other related objects. This type of report is not available with the standard reports that come automatically with Salesforce. What do you create in order to accommodate this requirement?**	Custom Report Type
44.	**You have been tasked with importing hundreds of cases into Salesforce. Which Data Import tool will be able to fulfill this requirement?** **Data Import Wizard** **Data Loader** **Mass Import Cases** **None of the Above**	B

45. **You have created a complex approval process in Salesforce and now need to provide a visual diagram that encompasses the different steps of the approval process. What tool would you use in Salesforce to access this visual diagram of the approval process?** A

Process Visualizer

Visualforce Page

Schema Builder

AppExchange

Process Builder

46. **Your company's Sales Teams are segmented into two categories: Business to Business (B2B) and Business to Consumer (B2C). The B2B Accounts need to be visible to the B2B Sales Team only. However, the B2C Accounts should be visible to both the B2B and B2C Sales Teams. What is the best way to meet requirement?** C

Create a new profile for the B2C Sales Team members and remove Read access to the B2B Accounts from it.

Set the Org Wide Default for Accounts to Public Read/Write, and then create a Sharing Rule to limit access to the B2B Accounts in order to hide them from the B2C Sales Team.

Set the Organization wide Default fro Accounts to Private, and then create a Sharing Rule to share the B2C accounts with both teams and another Sharing Rule to share the B2B accounts strictly with the B2B team.

Set the Org Wide Default fro Accounts to Private, and then instruct the B2B Sales Team to manually share B2C accounts with the B2C Sales Team.