Salesforce Sharing and Visibility Certification Practice Exam (Sample)

Study Guide

BY EXAMZIFY

Everything you need from our exam experts!

This is a sample study guide. To access the full version with hundreds of questions,

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Introduction

Preparing for a certification exam can feel overwhelming, but with the right tools, it becomes an opportunity to build confidence, sharpen your skills, and move one step closer to your goals. At Examzify, we believe that effective exam preparation isn't just about memorization, it's about understanding the material, identifying knowledge gaps, and building the test-taking strategies that lead to success.

This guide was designed to help you do exactly that.

Whether you're preparing for a licensing exam, professional certification, or entry-level qualification, this book offers structured practice to reinforce key concepts. You'll find a wide range of multiple-choice questions, each followed by clear explanations to help you understand not just the right answer, but why it's correct.

The content in this guide is based on real-world exam objectives and aligned with the types of questions and topics commonly found on official tests. It's ideal for learners who want to:

- Practice answering questions under realistic conditions,
- Improve accuracy and speed,
- Review explanations to strengthen weak areas, and
- Approach the exam with greater confidence.

We recommend using this book not as a stand-alone study tool, but alongside other resources like flashcards, textbooks, or hands-on training. For best results, we recommend working through each question, reflecting on the explanation provided, and revisiting the topics that challenge you most.

Remember: successful test preparation isn't about getting every question right the first time, it's about learning from your mistakes and improving over time. Stay focused, trust the process, and know that every page you turn brings you closer to success.

Let's begin.

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How to Use This Guide

This guide is designed to help you study more effectively and approach your exam with confidence. Whether you're reviewing for the first time or doing a final refresh, here's how to get the most out of your Examzify study guide:

1. Start with a Diagnostic Review

Skim through the questions to get a sense of what you know and what you need to focus on. Don't worry about getting everything right, your goal is to identify knowledge gaps early.

2. Study in Short, Focused Sessions

Break your study time into manageable blocks (e.g. 30 – 45 minutes). Review a handful of questions, reflect on the explanations, and take breaks to retain information better.

3. Learn from the Explanations

After answering a question, always read the explanation, even if you got it right. It reinforces key points, corrects misunderstandings, and teaches subtle distinctions between similar answers.

4. Track Your Progress

Use bookmarks or notes (if reading digitally) to mark difficult questions. Revisit these regularly and track improvements over time.

5. Simulate the Real Exam

Once you're comfortable, try taking a full set of questions without pausing. Set a timer and simulate test-day conditions to build confidence and time management skills.

6. Repeat and Review

Don't just study once, repetition builds retention. Re-attempt questions after a few days and revisit explanations to reinforce learning.

7. Use Other Tools

Pair this guide with other Examzify tools like flashcards, and digital practice tests to strengthen your preparation across formats.

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There’s no single right way to study, but consistent, thoughtful effort always wins. Use this guide flexibly — adapt the tips above to fit your pace and learning style. You've got this!

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Questions

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1. **When updating Organization-Wide Sharing Settings for the Account Object, which option should be considered regarding national accounts?**
   - A. Sales directors will need a sharing rule created to see accounts owned by Sales Users.
   - B. National accounts must be owned by a user who is above the sales managers in the Role Hierarchy.
   - C. Apex managed sharing will have to be disabled for proper access.
   - D. Access should always be granted to all roles for national accounts.

2. **Which two "Filter by owner" options would a user see while creating a list view on the Case object?**
   - A. My Case Teams
   - B. Roles
   - C. Public Groups
   - D. Queue

3. **When trying to implement parallel processes within Salesforce, what activity poses minimal risk related to group membership locking?**
   - A. Creating a new Role.
   - B. Deleting a Role.
   - C. Editing existing Roles.
   - D. Transforming existing Roles into Territories.

4. **What is the effect of disabling "Grant Access Using Hierarchies"?**
   - A. Users gain access based on the organization-wide default
   - B. Access must be defined through sharing rules
   - C. Users will inherit all records from their superiors
   - D. Record access will be denied for all users

5. **How do "Sharing Rules" differ from "Profile Settings"?**
   - A. Sharing Rules establish user permissions
   - B. Sharing Rules extend record access beyond profile definitions
   - C. Profile Settings control data visibility based on criteria
   - D. Profile Settings can only assign read access

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6. In a Private sharing model, who cannot view others' records?

A. Direct Reports

B. Team Leads

C. Some members of the same department

D. Everyone

7. What does it mean when the OWD is set to "Public Read Only"?

A. Users can view records but cannot edit them

B. All users can fully edit all records

C. Only the record owner can view the records

D. No users can see the records

8. Which two actions can help mitigate risks of import failures in large-volume data loads?

A. Minimize user group hierarchy.

B. Defer Sharing Calculation.

C. Increase batch size.

D. Group records by ParentID within a batch.

9. Which sharing rule type is best for giving specific user access to records based on certain criteria?

A. Owner-Based Sharing Rules

B. Criteria-Based Sharing Rules

C. Public Access

D. Implicit Rules

10. What does "Record Visibility" refer to in Salesforce?

A. The ability to delete records

B. The ability to view and interact with records

C. The capability to create reports

D. The ownership of records

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Answers

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1. B
2. A
3. A
4. B
5. B
6. B
7. A
8. B
9. B
10. B

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Explanations

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1. **When updating Organization-Wide Sharing Settings for the Account Object, which option should be considered regarding national accounts?**

   A. Sales directors will need a sharing rule created to see accounts owned by Sales Users.

   B. National accounts must be owned by a user who is above the sales managers in the Role Hierarchy.

   C. Apex managed sharing will have to be disabled for proper access.

   D. Access should always be granted to all roles for national accounts.

The option that states national accounts must be owned by a user who is above the sales managers in the Role Hierarchy is correct because it aligns with the structure of role-based access within Salesforce. In a Role Hierarchy, users are granted visibility to records owned by users lower than themselves. Therefore, for national accounts, which are often critical and high-stakes customer relationships, it's important that they are assigned to users in higher roles, such as regional directors or executives. This ensures that these accounts are properly safeguarded and that only users with appropriate authority can see or manage them, reflecting their significance and often sensitive nature. The other options do not accurately capture the nuance required in sharing settings for national accounts. For instance, while it might be beneficial for sales directors to have visibility into accounts owned by other users, it does not specifically address the hierarchy aspect critical for national accounts. The mention of disabling Apex managed sharing does not pertain directly to the necessity of ownership hierarchy for national accounts either. Lastly, granting access to all roles for national accounts goes against best practices for security and access control, which aim to limit visibility based on role relevance and appropriateness. Thus, the focus on ownership within the Role Hierarchy is essential for maintaining control over high

2. **Which two "Filter by owner" options would a user see while creating a list view on the Case object?**

   A. My Case Teams

   B. Roles

   C. Public Groups

   D. Queue

When creating a list view on the Case object, a user has the ability to filter records based on ownership. The "Filter by owner" options available help users narrow down the cases they want to view according to specific criteria related to ownership. Selecting "My Case Teams" as a filter option allows the user to view all cases that are owned by members of their associated case teams. Case teams are groups of users who work on a case together, and this filter ensures that users can easily access cases relevant to their team's collaboration. Filtering by "Queue" is another option available in the context of list views for Cases. Queues in Salesforce allow for the organization of records that need to be worked on by a group of users. By selecting the Queue filter, users can view all cases that are currently assigned to any given queue, facilitating efficient case management. Both these options provide a method for users to tailor their data view based on their role within the organization, ensuring they can focus on the most relevant cases associated with their own team or designated worklists. The other options, such as "Roles" and "Public Groups," do not directly correspond to ownership filtering in the same context for the Case object.

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3. When trying to implement parallel processes within Salesforce, what activity poses minimal risk related to group membership locking?

A. Creating a new Role.

B. Deleting a Role.

C. Editing existing Roles.

D. Transforming existing Roles into Territories.

Creating a new Role poses minimal risk related to group membership locking because it does not affect any existing roles or their associated users. When a new role is added, it simply expands the hierarchical structure without interfering with current relationships or memberships. This action allows for more flexibility in organizing users without risking any interruptions in access or visibility that could occur when modifying or deleting existing roles, which may require re-evaluating group memberships and could result in unexpected outcomes. In contrast, deleting a role or editing existing roles can lead to group membership locks, as these actions directly impact the existing users associated with those roles. Transforming roles into territories could also introduce complexity and risk, as it alters the fundamental structure of how users are grouped and their visibility settings. Thus, creating a new role is a low-risk activity within parallel processes in Salesforce.

4. What is the effect of disabling "Grant Access Using Hierarchies"?

A. Users gain access based on the organization-wide default

B. Access must be defined through sharing rules

C. Users will inherit all records from their superiors

D. Record access will be denied for all users

Disabling "Grant Access Using Hierarchies" means that users will no longer automatically inherit access to records based on their position in the role hierarchy. In a typical scenario where this feature is enabled, users in a higher role can see the records of those in lower roles. However, when the option is disabled, access must be explicitly defined through sharing rules or other sharing mechanisms. This approach allows for more granular control over who has access to specific records, ensuring that users can only see records that they are explicitly granted access to, rather than relying on their position in the hierarchy. By requiring administrators to set up sharing rules, it promotes a more secure and customizable data access strategy. In contrast, other options do not accurately reflect the implications of disabling this feature. For instance, users do not gain access purely based on organization-wide defaults, nor do they inherit all records from superiors, and access isn't universally denied; rather, it is defined through the established sharing rules. Therefore, the correct understanding hinges on the necessity of defining access through these specific rules when "Grant Access Using Hierarchies" is disabled.

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5. How do "Sharing Rules" differ from "Profile Settings"?

A. Sharing Rules establish user permissions

B. Sharing Rules extend record access beyond profile definitions

C. Profile Settings control data visibility based on criteria

D. Profile Settings can only assign read access

The correct answer highlights a key distinction in Salesforce's security model. Sharing Rules are designed to extend record access to users based on specific criteria, beyond what is defined in their profiles. This means that even if a user does not have access to certain records according to their Profile Settings, Sharing Rules can grant them access based on shared criteria or roles. Profiles primarily determine the baseline level of access a user has to objects and fields. They define what actions a user can take, such as creating, reading, editing, or deleting records, and they set up default permissions. However, they do not govern how access to specific records can be modified or extended to other users. Therefore, while Profiles establish core permissions, Sharing Rules provide additional flexibility by allowing record-level access to be granted to users who might not necessarily have that level of access through their Profile Settings. This hierarchical approach allows for customized visibility and sharing of data tailored to organizational needs, based on roles or groups instead of just preset profile definitions.

6. In a Private sharing model, who cannot view others' records?

A. Direct Reports

B. Team Leads

C. Some members of the same department

D. Everyone

In a Private sharing model, the primary intent is to ensure that records are only accessible to specific users or groups of users. Under this model, a user can only see their own records unless sharing rules or role hierarchies are configured to allow broader visibility. Team Leads, as specified in the correct answer, operate under the constraints of this model; they do not inherently receive visibility into their team members' records. Their role does not automatically grant them access to view records owned by their direct reports or other users unless additional sharing rules are established. This model emphasizes the need for explicit configurations to broaden record access beyond individual ownership. Conversely, direct reports typically can see their own records and have visibility granted explicitly to them through defined sharing settings. Some members of the same department might leverage role hierarchy to access records owned by other users, depending on the specific sharing settings. Lastly, stating that "everyone" cannot view others' records oversimplifies the conditions of the Private sharing model, as it fails to account for sharing rules or exceptions that may apply. Overall, the essence of the Private sharing model lies in its restrictive approach to visibility, which protects user data and ensures that access to records requires deliberate configuration by Admins.

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7. What does it mean when the OWD is set to "Public Read Only"?

A. Users can view records but cannot edit them

B. All users can fully edit all records

C. Only the record owner can view the records

D. No users can see the records

When the Organization-Wide Default (OWD) is set to "Public Read Only," it means that all users can view the records but do not have the ability to edit them. In this sharing model, any user within the organization can access the records and see the relevant information, but their access is limited strictly to viewing, which ensures that the integrity of the data is maintained and prevents any unintentional changes by other users. The Public Read Only setting is particularly useful in scenarios where data visibility is necessary for transparency or collaboration, but the organization wants to prevent any alterations to sensitive information. This setting promotes trust in the data while keeping control over who can modify it. In this context, the other options do not align with the functionality of "Public Read Only." Records are available to all users for viewing, but editing is prohibited, making option A the accurate description of this sharing setting.

8. Which two actions can help mitigate risks of import failures in large-volume data loads?

A. Minimize user group hierarchy.

B. Defer Sharing Calculation.

C. Increase batch size.

D. Group records by ParentID within a batch.

Defer Sharing Calculation is a strategic action that can significantly reduce the risk of import failures during large-volume data loads. When sharing calculations are deferred, Salesforce does not compute sharing rules and record visibility during the data import process. This can help streamline the loading of data as it minimizes the resources that Salesforce needs to allocate at that moment. When records are imported without recalculating sharing rules, the system can operate more efficiently, thus reducing the likelihood of errors that could lead to import failures. This action is particularly beneficial during significant imports because it allows for an initial load of data without the computational overhead associated with adjusting record access during the process. Once the data import is successfully completed, sharing calculations can then be recalculated in one go, which minimizes the risk associated with potential cascading failures during individual record updates. In contrast, the other options can introduce complications. Reducing user group hierarchy might simplify data structures, but it doesn't directly mitigate import failure risks. Increasing batch size could lead to performance issues and timeouts if the system struggles to process larger volumes at once. Grouping records by ParentID within a batch can help manage relationships but does not inherently prevent import failures and might complicate the data load structure if not managed properly. Overall, deferring sharing calculations

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9. Which sharing rule type is best for giving specific user access to records based on certain criteria?

A. Owner-Based Sharing Rules

B. Criteria-Based Sharing Rules

C. Public Access

D. Implicit Rules

The best sharing rule type for giving specific user access to records based on certain criteria is criteria-based sharing rules. This type of rule allows administrators to configure sharing settings based on record attributes rather than ownership. For example, if you need to share all records of a certain type or status with specific users or groups, criteria-based sharing rules enable this by defining specific conditions that records need to meet for access to be granted. Criteria-based sharing rules are particularly useful in scenarios where ownership alone does not determine access needs. Instead, they provide a more granular approach to share records that meet defined criteria, such as a field value or a combination of fields. This functionality ensures that users only see records that are relevant to their role or responsibilities in the organization, aligning with the principles of least privilege and data security. The other types of sharing rules serve different purposes. Owner-based sharing rules are focused on sharing records based on the owner of the record, which doesn't allow for the same level of granularity based on specific field criteria. Public access governs visibility for all users without the safeguards of more tailored sharing settings. Implicit rules refer to automatic sharing provided to users based on their roles in a hierarchal structure, which also does not offer the specificity provided by criteria-based

10. What does "Record Visibility" refer to in Salesforce?

A. The ability to delete records

B. The ability to view and interact with records

C. The capability to create reports

D. The ownership of records

"Record Visibility" in Salesforce refers to the ability to view and interact with records. This encompasses how users access records based on their roles, sharing settings, and permission sets within the Salesforce platform. Effective record visibility ensures that users can see the data they need to perform their job functions while maintaining data security and integrity. Visibility includes not only the ability to view data but also to interact with it, which might involve editing, updating, or reporting on those records, depending on the permissions granted. This concept is integral to Salesforce's sharing model, which allows organizations to control who sees what data, ensuring that sensitive information is only accessible to authorized users. Other options like deleting records, creating reports, or ownership of records pertain to actions or attributes related to records but do not encapsulate the primary meaning of record visibility in the context of Salesforce.

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Next Steps

Congratulations on reaching the final section of this guide. You've taken a meaningful step toward passing your certification exam and advancing your career.

As you continue preparing, remember that consistent practice, review, and self-reflection are key to success. Make time to revisit difficult topics, simulate exam conditions, and track your progress along the way.

If you need help, have suggestions, or want to share feedback, we'd love to hear from you. Reach out to our team at hello@examzify.com.

Or visit your dedicated course page for more study tools and resources:

https://salesforce-sharingandvisibility.examzify.com

We wish you the very best on your exam journey. You've got this!

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