

SALESFORCE SHARING AND VISIBILITY CERTIFICATION PRACTICE EXAM (SAMPLE) STUDY GUIDE



SAMPLE STUDY GUIDE WITH LIMITED QUESTIONS

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THE FULL VERSION STUDY GUIDE**

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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.

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. 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.

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

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!

Questions

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- 1. What reason explains why an object might be excluded from the list of available objects in a Sharing Set?**
 - A. The object is a custom object and therefore not available for a sharing set.
 - B. The object's Organization-Wide sharing setting is set to Public Read/Write.
 - C. The object's Organization-Wide sharing setting is set to Private.
 - D. The custom object does not have a lookup to Accounts or Contacts.
- 2. If User B changes User A's team member access to the ACME account, what is the impact of this change?**
 - A. Changes affect the default Opportunity team.
 - B. Changes affect only the ACME Account.
 - C. Changes affect the default Account team.
 - D. Changes affect all child ACME Accounts.
- 3. What is a potential solution to the UNABLE_TO_LOCK_ROW error that agents encounter when creating cases for a large account?**
 - A. Review the Account structure to split the account into multiple branch accounts
 - B. Increase system limit on open cases
 - C. Remove duplicate cases from the system
 - D. Limit user access to the account
- 4. What are the primary benefits of using "Role Hierarchy" in Salesforce?**
 - A. Simplifies management of record access
 - B. Enhances user interface design
 - C. Improves data export capabilities
 - D. Facilitates mobile access for users
- 5. 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

- 6. To control visibility of sensitive invoice data, which two features are relevant in this scenario?**
- A. Master-Detail Relationship
 - B. Private Sharing Default for Invoices
 - C. Invoice Sharing Workflow
 - D. Lookup Relationship
- 7. To view associated Activities, what minimum sharing access is required for support users?**
- A. Public Read/Write access to Accounts/Contacts
 - B. Private access to Accounts/Contacts
 - C. No access to Accounts/Contacts
 - D. Public Read Only access to Accounts/Contacts
- 8. How can a System Administrator quickly determine which user profiles, page layouts, and record types include certain fields on the Account object?**
- A. Log in as each user profile and view the Account Page Layouts.
 - B. Use the Field Accessibility Viewer for the fields in question.
 - C. Universally require the field at the field level.
 - D. Click the Field-Level Security for the field on each Profile.
- 9. What can be done to enable visibility of customer cases for dealer managers under a private sharing model?**
- A. Create Sharing Groups
 - B. Employ Role Hierarchy
 - C. Limit Sharing Rules
 - D. Implement Batch Jobs
- 10. What should be defined to avoid ambiguity about record access in sharing rules?**
- A. Sharing settings for all objects
 - B. Profiles for each role
 - C. Organizational-wide defaults
 - D. Group memberships for users

Answers

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

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Explanations

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1. What reason explains why an object might be excluded from the list of available objects in a Sharing Set?

- A. The object is a custom object and therefore not available for a sharing set.
- B. The object's Organization-Wide sharing setting is set to Public Read/Write.**
- C. The object's Organization-Wide sharing setting is set to Private.
- D. The custom object does not have a lookup to Accounts or Contacts.

The reason an object might be excluded from the list of available objects in a Sharing Set is due to the Organization-Wide sharing settings. When the sharing setting for an object is configured to Public Read/Write, it indicates that all users can view and edit all records without requiring the additional use of a Sharing Set to grant access. This makes the creation of a Sharing Set unnecessary for such objects because the permissions are already sufficiently broad. Thus, the object will not appear in the Sharing Set configuration, as there would be no need for that extra level of sharing when access is already granted at the organizational level. In contrast, if an object's sharing setting is set to Private or if it does not have a lookup relationship to Accounts or Contacts, it would indeed be visible for inclusion in a Sharing Set to facilitate specific sharing needs. Custom objects, regardless of whether they are custom or standard, can be part of Sharing Sets as long as their settings allow for it, leading to the exclusions primarily being driven by the public versus private sharing designation.

2. If User B changes User A's team member access to the ACME account, what is the impact of this change?

- A. Changes affect the default Opportunity team.
- B. Changes affect only the ACME Account.**
- C. Changes affect the default Account team.
- D. Changes affect all child ACME Accounts.

The correct answer is that the changes affect only the ACME Account. When User B changes User A's team member access to a specific account, such as the ACME account, that action is localized to just that account and does not impact any other accounts or team structures. In Salesforce, teams are managed at both the account and object level, meaning that changing a team member's access for a particular account will only modify permissions or visibility for that specific instance. This ensures that other accounts, opportunities, or child accounts remain unaffected by changes made in this context, thereby providing both security and data integrity. Other options are not relevant in this scenario because changes to team access for a specific account do not influence default team settings or other accounts unless explicitly stated or configured to do so. The localized nature of access management allows organizations to maintain precision in sharing data and ensures that users' permissions are tailored to the specific needs of individual accounts.

3. What is a potential solution to the UNABLE_TO_LOCK_ROW error that agents encounter when creating cases for a large account?

- A. Review the Account structure to split the account into multiple branch accounts**
- B. Increase system limit on open cases
- C. Remove duplicate cases from the system
- D. Limit user access to the account

The UNABLE_TO_LOCK_ROW error typically occurs in Salesforce when multiple transactions are trying to access the same record simultaneously, leading to contention over that record. In the context of creating cases for a large account, this error may arise because numerous agents are attempting to create cases related to that account at the same time. Reviewing and restructuring the Account hierarchy by splitting the account into multiple branch accounts can effectively alleviate the contention issue. By doing so, the volume of operations competing for lock access on the original account record is reduced. Each branch account can have its own separate set of cases, allowing agents to work independently without interfering with each other, thus minimizing the probability of encountering the locking error. The other options may not address the underlying cause of the locking issue. Increasing the system limit on open cases, for instance, does not inherently resolve contention issues among agents. Similarly, removing duplicate cases or limiting user access to the account does not necessarily prevent the UNABLE_TO_LOCK_ROW error but could potentially complicate the case management process. Therefore, restructuring the account into multiple branches is a more effective long-term solution to manage high case volume effectively while reducing potential locking conflicts.

4. What are the primary benefits of using "Role Hierarchy" in Salesforce?

- A. Simplifies management of record access**
- B. Enhances user interface design
- C. Improves data export capabilities
- D. Facilitates mobile access for users

The primary benefits of using "Role Hierarchy" in Salesforce primarily revolve around simplifying the management of record access. Role Hierarchy allows organizations to establish a structured approach to data visibility and access controls, ensuring that users at higher levels in the hierarchy can access all records owned by users below them. This hierarchical structure makes it easier for administrators to manage permissions and access without needing to individually set sharing rules for each user. By leveraging Role Hierarchy, organizations can create a clearer and more streamlined sharing model that aligns with their business processes. This ensures that teams can work collaboratively without excessive barriers to access, while still maintaining necessary levels of data security. The hierarchy also aids in data visibility for reporting purposes, allowing higher-level managers to oversee the performance and data of their entire team efficiently. While other options may pertain to different features or aspects of Salesforce functionalities, they do not directly relate to the core capabilities and benefits offered by Role Hierarchy in managing record access.

5. 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.

6. To control visibility of sensitive invoice data, which two features are relevant in this scenario?

- A. Master-Detail Relationship
- B. Private Sharing Default for Invoices**
- C. Invoice Sharing Workflow
- D. Lookup Relationship

In the context of controlling visibility for sensitive invoice data, the use of a private sharing default for invoices is particularly relevant. This setting ensures that only the owner of the invoice record has access to view it by default. When applying a private sharing model, access must be explicitly granted to other users, thereby maintaining a higher level of confidentiality and control over who can see this sensitive information. Choosing a private sharing default is a strategic decision to protect sensitive data, ensuring that it is not accessible to unauthorized users unless specific sharing rules or manual sharing settings are applied. This aligns with best practices for data security and compliance, making it a fitting choice for managing sensitive invoice information. The other features listed may play roles in data relationships or workflows but do not directly address the need for restricted visibility. For instance, a master-detail relationship or a lookup relationship primarily defines how records are related and does not inherently control visibility. An invoice sharing workflow could potentially manage how invoices are shared, but it does not provide the foundational level of security that a private sharing model does. Therefore, a private sharing default for invoices stands out as the most direct approach to achieving the objective of protecting sensitive data.

7. To view associated Activities, what minimum sharing access is required for support users?

- A. Public Read/Write access to Accounts/Contacts
- B. Private access to Accounts/Contacts
- C. No access to Accounts/Contacts
- D. Public Read Only access to Accounts/Contacts**

To view associated Activities in Salesforce, users must have at least Public Read Only access to the related Accounts and Contacts. This level of access ensures that users can see the records they need to interact with or log activities against. When sharing settings are set to Public Read Only, users can view the associated records but cannot make any changes or updates to them. This access level is crucial for support users who need to reference customer information to provide assistance while ensuring data integrity and security. In scenarios where users have less restrictive access, such as Public Read/Write access, they have more permissions than necessary for the specific requirement of simply viewing activities. Conversely, having Private access or no access to Accounts/Contacts would completely restrict their visibility, preventing them from seeing the Activities linked to those records, which is essential for supporting customers efficiently. Thus, Public Read Only access strikes the right balance, granting essential visibility without enabling excessive edits or alterations to the data.

8. How can a System Administrator quickly determine which user profiles, page layouts, and record types include certain fields on the Account object?

- A. Log in as each user profile and view the Account Page Layouts.
- B. Use the Field Accessibility Viewer for the fields in question.**
- C. Universally require the field at the field level.
- D. Click the Field-Level Security for the field on each Profile.

Using the Field Accessibility Viewer for the fields in question provides a comprehensive and efficient way to assess the visibility and accessibility of specific fields across various profiles and roles within Salesforce. This tool allows the System Administrator to see at a glance how different user profiles interact with the fields on the Account object, displaying the read and edit access for each profile. The Field Accessibility Viewer consolidates this information, thereby eliminating the need to check each profile individually or log in as various users. It visualizes the relationships between profiles, record types, and page layouts, providing clarity on which users can see or edit particular fields. This capability is crucial for ensuring that users have the appropriate access based on their role within the organization, and it facilitates troubleshooting when access issues arise. The other options, while they offer some information, are generally less efficient. Logging in as each user profile introduces significant time consumption and potential oversight. Requiring the field universally at the field level does not help in determining current field usage and accessibility; it merely enforces a policy. Lastly, clicking into Field-Level Security for each profile can be cumbersome and still requires manual cross-referencing of layouts and record types. The Field Accessibility Viewer streamlines this process, making it the best choice for quickly determining field inclusion.

9. What can be done to enable visibility of customer cases for dealer managers under a private sharing model?

- A. Create Sharing Groups
- B. Employ Role Hierarchy**
- C. Limit Sharing Rules
- D. Implement Batch Jobs

Enabling visibility of customer cases for dealer managers under a private sharing model can effectively be achieved through employing role hierarchy. In a private sharing model, records are only visible to the owner and users above the owner in the role hierarchy. By structuring the role hierarchy appropriately, dealer managers can gain access to cases owned by their subordinates. This ensures that managerial staff can view and manage related cases without compromising the overall security of the private sharing settings. Role hierarchy allows for an organizational structure that facilitates visibility and access, ensuring that users in higher roles can see records owned by those in lower roles. This is particularly important in a private sharing model where access to records is explicitly restricted, thereby making role hierarchy a vital component for managing visibility effectively. The other options do not directly enhance visibility in the way role hierarchy does. For example, sharing groups are useful for sharing records among a specified set of users, but their application is limited and may not address the hierarchical nature of visibility in a private model. Similarly, limiting sharing rules would not enhance visibility; instead, it restricts access, which is counterproductive in this context. Implementing batch jobs relates to processing records efficiently rather than directly affecting user visibility, making it irrelevant for this scenario.

10. What should be defined to avoid ambiguity about record access in sharing rules?

- A. Sharing settings for all objects
- B. Profiles for each role
- C. Organizational-wide defaults**
- D. Group memberships for users

Defining organizational-wide defaults (OWD) is crucial to establishing a clear baseline for record access within the Salesforce platform. OWD settings dictate the default level of access that users have to records they do not own. By specifying these defaults, organizations can ensure that there is a defined and consistent level of visibility and access across different objects, thereby avoiding ambiguity in sharing rules. Once the OWD is set, sharing rules can then be created to provide broader access or share specific records with designated groups, roles, or users. This layered approach to sharing ensures that everyone understands the foundational access restrictions and any subsequent expansions of access provided through role hierarchy, sharing rules, and manual sharing. While sharing settings for all objects, profiles, and group memberships are important components of Salesforce's security model, they function within the framework established by the OWD. Without clearly defined organizational-wide defaults, the sharing rules may become confusing or contradictory, leading to potential security issues or access problems within the organization.

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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