



Salesforce

Exam Questions CRT-251

Salesforce Certified Sales Cloud Consultant (SU18)

NEW QUESTION 1

Universal Containers wants to measure revenue based on when individual Products are sold. What should a Consultant implement to meet this requirement?

- A. Forecasting by Order Amount
- B. Forecasting by Opportunity Amount
- C. Forecasting by Product Dates
- D. Forecasting by Schedule Date

Answer: B

NEW QUESTION 2

Universal Containers sells products that require frequent collaboration with the same team of individuals who play a key role in closing deals. The lead sales representative determines the level of access for each of the collaborating team members on an opportunity.

Which solution should a consultant recommend to facilitate the collaboration of the lead sales representative and team members?

- A. Create public groups for extended team members and allow the sales representative to assign manual sharing on their opportunities.
- B. Define a sharing rule for each lead sales representative to assign appropriate access for all extended team members.
- C. Configure default opportunity teams for all lead sales representatives with team selling enabled.
- D. Enable Chatter to have the lead sales representative facilitate collaboration through sales team swarming.

Answer: C

NEW QUESTION 3

Which three considerations should be addressed when implementing Advanced Currency Management? (Choose three.)

- A. Currency roll-up summary fields from opportunities to an account use the static conversion rate.
- B. Currency roll-up summary fields from opportunity products to an opportunity use the dated exchange rate.
- C. The converted amount of an opportunity uses dated exchange rates based on the close date of the opportunity.
- D. Advanced Currency Management can be enabled or disabled in the organization under the company profile, if needed.
- E. Advanced Currency Management dated exchange rate are automatically updates in a monthly basis.

Answer: BCD

NEW QUESTION 4

Universal Containers is preparing for the launch of its new Sales Cloud implementation to a global user base. With previous sales automation applications, the company had slow adoption of the new solution. Which three Sales Cloud deployment factors should be considered to help ensure adoption? Choose three answers.

- A. Type of training delivered
- B. Sales rep quota targets
- C. Management communications
- D. Maintenance release schedule
- E. Training in local language

Answer: ACE

NEW QUESTION 5

The Universal Containers credit department uses a third-party application for credit ratings. Credit department managers need to launch an external web-based credit application from a customer's account record in Salesforce. The application uses a credit ID on the account object. What should a consultant recommend to meet this requirement?

- A. Create a workflow rule to launch the product fulfillment application and pass the credit ID.
- B. Create a custom button that calls an Apex trigger to launch the credit application and pass the credit ID.
- C. Create a formula field that uses the hyperlink function to launch the credit application and pass the credit ID.
- D. Create a custom credit ID field as an external ID on the account to launch the credit application and pass the credit ID.

Answer: C

NEW QUESTION 6

What are two capabilities of Data Loader? Choose two answers.

- A. Ability to extract organization and configuration data.
- B. Ability to prevent importing duplicate records.
- C. Ability to export field history data
- D. Ability to run one-time or scheduled data loads

Answer: CD

NEW QUESTION 7

Universal Containers sells two product lines that each use a distinct selling methodology. Additionally, each product line captures different information that is used to sell the products.

What should a consultant recommend to support selling the two product lines?

- A. Create one page layout, two sales processes, and validation rules to capture relevant opportunity information.
- B. Create two page layouts, one opportunity record type, and one workflow rule to assign the correct page layout to the record type.

- C. Create two sales processes and two page layouts; assign them to two different opportunity record types for each product line.
- D. Create two page layouts and two sales processes; assign them to the respective product lines to collect relevant information.

Answer: C

NEW QUESTION 8

Universal Containers needs to show a dashboard with forecast by product family with quotas. Which solution should a consultant recommend?

- A. Build a joined report with closed opportunities, forecasting items, and quotas.
- B. Customize quotas with product report, and add necessary fields.
- C. Build a custom report type with forecasting quotas and forecasting items.
- D. Create an analytic snapshot to capture the opportunity forecast.

Answer: D

NEW QUESTION 9

Universal Containers has a public sharing model for accounts and uses the parent account field to create a multi-level account hierarchy. When viewing a parent account, the company wants to see the total value of open opportunities for all accounts in the hierarchy. Which solution should a consultant recommend to meet this requirement?

- A. Use Apex to update a custom field on the parent account with the total value of open opportunities from the child accounts.
- B. Create a roll-up summary field on the parent account showing the total value of open opportunities from the child accounts.
- C. Define a workflow rule to update the custom field on the parent account with the total value of open opportunities from the child accounts.
- D. Create a link on the account that opens a report showing the total value of open opportunities for all accounts in the hierarchy.

Answer: A

NEW QUESTION 10

Universal Containers sells three unique products and each product has its own sales process. The company qualifies prospects for the three products in a consistent manner; however, once the customer has shown interest, the sales representatives must follow the relevant product's sales process. Which two solutions should a consultant recommend to meet these requirements? Choose two answers.

- A. Configure opportunity record types for each sales process.
- B. Create sales stages that align with opportunity record types.
- C. Define sales processes to map to each opportunity record type.
- D. Define the default opportunity teams for each opportunity record type.

Answer: BC

NEW QUESTION 10

Universal Containers is planning to hire more sales representatives in response to three consecutive quarters of rapid growth. To optimize their sales impact, the sales management team wants to develop a better sales territory structure. Which two data points should the sales management team consider when developing the new sales territories? Choose two answers.

- A. Attributes needed to segment and categorize customers.
- B. Distance between customer headquarters and their sales representatives
- C. Average number of customers managed by a sales representative.
- D. Number of currencies needed to support each sales territory.

Answer: AD

NEW QUESTION 13

Universal Containers has enabled Social Accounts and Contacts. When a sales representative accesses a contact within Salesforce, the representative is unable to see detailed information from the contact's social profiles. What is preventing the sales representative from accessing this information?

- A. The fields configured by Universal Container's administrator on the contact page layout are missing.
- B. The information shown is based on the sales representative's social connection with the contact.
- C. The link to the Facebook profile is NOT configured with the administrator password to access detailed information.
- D. Universal Containers must install and APP Exchange package to access public profile information for its users.

Answer: B

NEW QUESTION 16

The sales management team of Universal Containers has noticed that opportunities are taking longer to close. Historically, it has taken 30 days for a new opportunity to be moved to closed/won. Recently, this time period has increased to 45 days. Which two reporting tools can the sales management team leverage to help determine the cause? Choose two answers.

- A. Report on campaign return on investment (ROI)
- B. Report on the discount approval time for quotes
- C. Dashboard of month-over-month trend of lead conversions
- D. Dashboard of opportunity stage duration

Answer: BD

NEW QUESTION 18

Universal Containers allows its sales representatives to negotiate up to a 5% discount for their opportunities. Discounts greater than 5% must be sent to their Regional Sales Manager (RSM) to approval. Discounts greater than 15% must also be sent to the Regional Vice President (RVP) for approval. Which approach would satisfy these requirements?

- A. Configure an approval process for the RSM and a workflow rule for the RVP.
- B. Create two approval processes, one for the RSM and one for the RVP.
- C. Create the two-step approval process for the RSM and RVP as approvers.
- D. Configure a workflow approval task and email to notify the RSM and RVP.

Answer: C

NEW QUESTION 22

Sales management at Universal Containers is concerned that pipeline and forecasting reports are inaccurate because sales representatives are creating opportunities after they are closed/won. Which two solutions will help sales management identify and address the issue? Choose two answers.

- A. Run the opportunity pipeline standard report to view the upcoming opportunities by stage.
- B. Use a workflow rule to email sales management when the opportunity is created in the closed/won stage.
- C. Create a report that displays opportunities that have a closed date less than or equal to the created date.
- D. Create a workflow rule that automatically updates the opportunity to the first stage in the sales process.

Answer: BC

NEW QUESTION 24

Which two actions can a consultant take during the project planning phase to ensure client stakeholder goals are met? (Choose two.)

- A. Create scheduled dashboard to be sent weekly to all stakeholders.
- B. Ensure the project key performance indicators are profitable.
- C. Acquire the client stakeholder's key performance indicators.
- D. Establish a stakeholder committee and meeting schedule.

Answer: CD

NEW QUESTION 28

Resellers for Universal Containers need access to reports in the Partner Communities to help manage their opportunities. How should Salesforce be configured to give resellers the correct level of access to reports?

- A. Create the appropriate list views and report folders in the Partner Communities for all partner users.
- B. Create a new tab in the Partner Communities to display the appropriate list views and report folders.
- C. Create a Chatter group that allows partners to post links to appropriate list views and reports.
- D. Create the appropriate list views and report folders, and share with all partner users.

Answer: D

NEW QUESTION 29

Universal Containers is devising a separate sales methodology to upsell service contracts to its existing customer base. The company wants to track and report on these deals separately from other deals. What should a consultant recommend to meet this requirement?

- A. Create a custom field on opportunity to flag and report on these sales.
- B. Create an opportunity record type and sales process for reporting on these deals.
- C. Create a separate page layout and report to flag and report on these deals.
- D. Add "upsell" as a stage and create a summary by opportunity stage.

Answer: B

NEW QUESTION 34

Universal Containers has set up a sales process that requires opportunities to have associated product line items before moving to the negotiation stage. Which two solutions should a consultant recommend to meet this requirement? Choose two answers.

- A. Configure a validation rule that tests the Has Line Item and Stage fields for the correct condition.
- B. Configure the opportunity record types to enforce product line item entry before selecting the negotiation stage.
- C. Ensure that all sales representatives have access to at least one PriceBook when creating product lines.
- D. Define a workflow rule that automatically defaults to a PriceBook and product line item when selecting the negotiation stage.

Answer: AC

NEW QUESTION 39

Universal Containers has a private sharing model and wants the ability to share documents related to an opportunity, such as contracts and proposals, with the field sales team. How can the documents be shared efficiently and securely?

- A. The documents should be uploaded to Salesforce Files and shared with the field sales organization.
- B. The documents should be emailed to the sales team on the opportunity record.
- C. The documents should be uploaded to Salesforce Files from the opportunity record.
- D. The documents should be uploaded to a library that is shared with the field sales organization.

Answer: A

NEW QUESTION 44

Universal Containers has a customer base of over 15,000 Accounts and 60,000 Contacts. The marketing manager wants to use the customer data for an upcoming new product launch but is concerned contacts may have moved to different companies. What should a consultant recommend to ensure customer data is accurate?

- A. Use a data cleansing tool and the Stay-in-Touch feature of Salesforce to email contacts.
- B. Create a workflow rule for an account and contact owner to confirm contact data.
- C. Create a workflow rule to mass email the contacts and capture any email bounces.
- D. Use a data enrichment tool to verify account and contact data is up-to-date.

Answer: A

NEW QUESTION 46

Universal Containers uses PDF documents to help the Sales Team learn about new Products. Which feature should a Consultant recommend to store these documents?

- A. File Sync
- B. Salesforce Files
- C. Attachments
- D. File Contact for SharePoint

Answer: B

NEW QUESTION 50

Universal Containers wants to improve the accuracy of its current sales forecast. It also wants to improve the relevance of its sales stages and the role they play in the sales process.

How should the relationship between the various elements of the sales process be defined to meet these requirements?

- A. Map sales probability values to forecast categories; assign sales stages accurate percentages.
- B. Map forecast probability to opportunity probability; assign appropriate sales stage.
- C. Map appropriate sales stage to opportunity stage; assign accurate forecast probability.
- D. Map opportunity stages to forecast categories; assign accurate probability to each stage.

Answer: D

NEW QUESTION 51

Universal Containers' management wants to see forecast numbers by all sales representatives and by multiple product groups. Which two actions should a consultant recommend to meet these requirements? (Choose two.)

- A. Implement Collaborative Forecasting with product family.
- B. Build a custom forecast report showing product groups.
- C. Build a forecast list view by product family group.
- D. Implement Collaborative Forecasting with quota attainment.

Answer: AD

NEW QUESTION 53

Universal Containers is moving from a legacy customer relationship management (CRM) system to Salesforce Sales Cloud. What should a consultant recommend to ensure a successful implementation?

- A. Review the current system with all levels of users to understand their requirements.
- B. Review the current system with executive management to understand their requirements.
- C. Review the current system with IT management to understand their requirements.
- D. Review the current system and configure Sales Cloud to work in the same way.

Answer: A

NEW QUESTION 54

Universal Containers wants to track the campaigns that influence won opportunities.

Which two actions should a consultant recommend to meet this requirement using standard functionality? Choose two answers.

- A. Have the administrator specify a timeframe that limits the time a campaign can influence an opportunity after the campaign first associated date and before the opportunity created date.
- B. Automatically add child campaigns of the primary campaign source if the child campaigns have an end date that fails before the opportunity close date.
- C. Add campaigns to opportunities when the campaign is related to a contact that is assigned a contact role on the opportunity prior to the close date.
- D. Have representatives populate a field on the opportunity record with the dollar amount of the expected revenue from the campaigns that influenced the opportunity.

Answer: AC

NEW QUESTION 57

Universal Containers has its sales representatives enter a new lead whenever they are prospecting a new customer. After qualifying the new lead, a new opportunity must be created to track the deal.

Which three actions should a consultant recommend to enforce data quality and accuracy? (Choose three.)

- A. Enable validation rules on the opportunity.

- B. Map custom lead fields to corresponding custom opportunity fields.
- C. Create an Apex trigger to perform data quality checks.
- D. Enable validation rules on the lead.
- E. Enable the lead conversion permission.

Answer: BDE

NEW QUESTION 59

A marketing department that runs many concurrent campaigns has specified that the influence timeframe for a campaign is 60 days. What is the impact on the campaign influence for opportunities when a contact is associated to an opportunity in a contact role?

- A. Campaigns in which a contact became a member within the last 60 days will be associated and displayed in Campaigns with Influenced Opportunities Report.
- B. All contacts associated with campaigns will be added to the campaign influence related list.
- C. Sales reps can choose which campaigns created within the last 60 days should be added to the campaign influence related list.
- D. All campaigns created within the last 60 days will be added to the campaign influence related list.

Answer: A

NEW QUESTION 60

Universal Containers acquires sales leads each year through trade shows. Occasionally, duplicate leads are generated when the marketing team imports leads that already exist in the system. What should a consultant recommend to prevent duplicate leads in the system?

- A. Upload the leads to Data.com to remove the duplicates and select the option to have them automatically imported.
- B. Upload the leads and click the "Find Duplicates" button for each of the leads to identify potential duplicate lead records.
- C. Upload the leads using Data Loader and enable the "Find Duplicates" setting to prevent duplicate records.
- D. Upload the leads using Data Import Wizard and select the appropriate field to match duplicates against existing records.

Answer: D

NEW QUESTION 65

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