Exam Questions CRT-251

Salesforce Certified Sales Cloud Consultant (SU18)

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NEW QUESTION 1
The Universal Containers sales team wants to track product shipments for each of its customers. The shipment tracking information is currently available in a back-end system, which the company plans to integrate with Salesforce. Which set of objects are relevant for this integration?

A. Opportunity, opportunity product, campaign, custom object-shipment status
B. Opportunity, opportunity product, custom object-shipment status
C. Lead, account, opportunity product, custom object-shipment status
D. Lead, opportunity, product, custom object-shipment status

Answer: B

NEW QUESTION 2
Universal Containers has a customer base that includes both individual consumers and businesses. The company has implemented Person Accounts in Salesforce and has a custom object for "Policies" that needs to relate to both Person Accounts and business accounts.
What is the minimum configuration on the policy custom object needed to meet this requirement?

A. Create a contact lookup field and an account lookup field.
B. Create a master-detail account relationship.
C. Create a custom contact lookup field.
D. Create a master-detail contact relationship.

Answer: B

NEW QUESTION 3
Universal Containers uses Products in Salesforce and has a private security model. The product management employees do NOT have access to all opportunities but wants to track the performance of a new product after it is launched. What should a consultant recommend to allow the product management employees to track the performance of the product?

A. Create a trigger to add the product management team to the sales team of relevant opportunities.
B. Create a criteria-based sharing rule to add the product management team to relevant opportunities.
C. Create a trigger to set the product manager as owner for opportunities on the new product.
D. Create a new product and add it to the price book with the product manager as an owner.

Answer: B

NEW QUESTION 4
Universal Containers recently completed the implementation of a new Sales Cloud solution. The stakeholder committee believes that sales user adoption is best measured by the number of daily logins. Which two measures of sales user adoption should be considered? Choose two answers.

A. Number of reports exported to Excel for analysis
B. Number of neglected opportunities over time by role
C. Completeness of records entered into the new system
D. Overall effectiveness of mass email campaigns

Answer: BC

NEW QUESTION 5
The sales representatives at Universal Containers use various email applications and often receive important customer emails where they are away from the office. Sales management wants to ensure sales representatives are recording email activity with customers in Salesforce while they are away from the office. Which solution should a consultant recommend to meet this requirement?

A. Download and install a Salesforce universal connector for their smartphones and computers.
B. Download and install the Salesforce for Outlook connector on their smartphones and computers.
C. Forward emails using their Email-to-Salesforce email address from their smartphones and computers.
D. Copy and paste emails manually to the customer record in Salesforce from their smartphones and computers.

Answer: C

NEW QUESTION 6
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 7
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 8
Universal Containers forecasts and closes business monthly, and it needs to store details of open opportunities weekly. The sales management team wants to analyze how the sales funnel is changing throughout the month. What should a consultant recommend to meet this requirement?

A. Schedule a custom forecast report to run weekly and store the results in a custom report folder.
B. Create a reporting snapshot to run daily and store the results in a custom object.
C. Create a reporting snapshot to run weekly and store the results in a custom object.
D. Schedule a custom forecast report to run daily and store the results in a custom report folder.

Answer: A

NEW QUESTION 9
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 10
Universal Containers has set the organization-wide default to public read-only for accounts, contacts, and opportunities. Activities are set to be controlled by the parent. The ABC Corporation account is owned by a sales user whose profile grants create, read, edit, and delete access to accounts, contacts, and opportunities. Which two actions does the owner of the ABC Corporation account have the right to take? Choose two answers.

A. View, edit, and delete activities owned by other users directly related to the account.
B. View, edit, and delete related contacts and opportunities owned by other users.
C. Share the account with other users through manual sharing and account teams.
D. Transfer ownership of related contacts and opportunities owned by other users.

Answer: AC

NEW QUESTION 10
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 form 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 14
Universal Containers wants to implement a sales methodology that focuses on identifying customer's challenges and addressing them with its offerings. Which sales methodology is described above?

A. Relationship selling
B. Target account selling
C. Direct selling
D. Solution selling

Answer: D

NEW QUESTION 15
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 19

Universal Containers wants to associate some contacts with more than one account (e.g., a contact in an employee of one account and on the boards of several other accounts). Which solution should a consultant recommend to meet this requirement?

A. Enable contacts to multiple accounts feature.
B. Clone the contact record and add it to the second account.
C. Add the contact to the partners related list on the second account.
D. Associate the contact to other accounts using a custom lookup field.

Answer: C

NEW QUESTION 21
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 22
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 24
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 25
The management at Universal Containers noticed the lead conversion ratio has remained the same for the hospitality industry despite an increase in lead creation.
Which reporting tool can help determine the issue?

A. Report on leads by source
B. Campaign dashboard by industry
C. Report on lead lifetime by industry
D. Industry performance dashboard

Answer: C

NEW QUESTION 28
The shipping department at Universal Containers is responsible for sending product samples as part of the sales process. When an opportunity moves to the "sampling" stage, Universal Containers wants an automatic email sent to the shipping department listing the products on the opportunity. How can this requirement be met using a workflow email?

A. Create is on the opportunity product using an HTML email template.
B. Create is on the opportunity using a Visualforce email template.
C. Create is on the opportunity product using a Visualforce email template.
D. Create is on the opportunity using an HTML email template.

Answer: B

NEW QUESTION 30
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 34
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 37
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 40
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 43
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 44
Sales management at Universal Containers wants product managers to become more involved with sales deals that are being delayed in the negotiation stage of the sales process. Product managers need to understand the details of specific sales deals, and address product capability and roadmap questions with customers. Which two solutions should a consultant recommend to help product managers engage in sales deals? Choose two answers.

A. Create a Chatter group to share product information with the sales team, product managers, and customers.
B. Use Process Builder to create a chatter post.
C. Use an assignment to notify product managers when opportunities are updated.
D. Add the opportunity team, product managers, and customers to libraries containing files relevant to sales deals.

Answer: AB

NEW QUESTION 47
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