

## CRT-251 Dumps

### Salesforce Certified Sales Cloud Consultant (SU18)

<https://www.certleader.com/CRT-251-dumps.html>



**NEW QUESTION 1**

Universal Containers' current solution for managing its forecasts is cumbersome. The sales managers do NOT have visibility into their teams' forecasts and are NOT able to update the forecasts. As a result, the managers are continually asking their sales representatives to provide updated forecast data via email or phone. Which two solutions should a consultant recommend to help Universal Containers improve the management of their forecasts? Choose two answers.

- A. Enable override forecast permission in the Manager's profile.
- B. Configure weekly customized forecast reports and dashboards to be emailed to sales management.
- C. Create a forecast hierarchy and assign managers to the forecast manager role.
- D. Create forecast Chatter groups where sales representatives can post and share their forecasts.

**Answer:** AC

**NEW QUESTION 2**

Universal Containers has automated the process of creating new account records in Salesforce. All accounts records created through this process are owned by a generic user. There are now two million account records that have been created in this manner. Universal Containers is now seeing performance issues when it makes any changes to account sharing rules.

What can Universal Containers do to address the issue without changing its integration?

- A. Set the organization-wide defaults for accounts to public read/write.
- B. Contact Salesforce support to add an index to the account object.
- C. Ensure that the generic user has the Modify All Data permission.
- D. Ensure that the generic user has NOT been assigned to a role.

**Answer:** D

**NEW QUESTION 3**

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 4**

Universal Containers wants to capture business sector information on a lead and display the information on the account and contact once the lead has been converted. How can these requirements be met?

- A. Create a custom field on the Lead, Account, and Contact objects and configure mapping of these two field for conversio
- B. Use a trigger to update the Contact field with the Account value.
- C. Create a custom field on the Lead and Account object
- D. Create a custom formula field on the Contact object to pull the value from the Account object.
- E. Create a custom field on the Lead and Account objects and configure mapping of these two fields for conversio
- F. Create a custom formula field on the Contact object to pull value form the Account object.
- G. Create a custom field on the Lead and Account objects and configure mapping of these two fields for conversio
- H. Create a custom formula field on the Account object to pull value form the Contact object.

**Answer:** C

**NEW QUESTION 5**

Universal Containers wants to equip its sales team with mobile capabilities. The sales team needs to quickly look up contacts, accounts, and opportunities and easily log calls. Due to limited coverage in certain geographic areas, the sales team wants access to customer information even without an Internet connection. Which mobile solution is appropriate for the Universal Containers' sales team?

- A. Salesforce Mobile app
- B. SalesforceA App
- C. Custom hybrid App
- D. Salesforce Touch App

**Answer:** A

**NEW QUESTION 6**

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 7**

The marketing department at Universal Containers is migrating from its legacy campaign and email management system to Salesforce and wants to ensure that its communication materials can be migrated as well. What should a consultant recommend to migrate the marketing department's email templates?

- A. Enable Email-to-Close and use the Import Wizard.
- B. Create an email template change set or use the Lightning Platform.
- C. Manually recreate the email and mail merge templates in Salesforce.
- D. Enable Email to Salesforce before sending email templates to Salesforce.

**Answer:** C

**NEW QUESTION 8**

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 9**

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 10**

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 10**

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 14**

Universal Containers uses a seven-step selling methodology. Each sales stage corresponds with a step in the methodology. The first stage is a preliminary qualification step, and opportunities in this stage should NOT contribute to the forecast. Which two actions should a consultant recommend to meet these requirements? Choose two answers.

- A. Instruct sales users to enter 0\$ for the opportunity amount.
- B. Configure the first stage with the omitted forecast category.
- C. Override the forecast to be 0\$ for first stage opportunities.
- D. Assign 0% probability to the first sales stage.

**Answer:** BD

**NEW QUESTION 19**

Universal Containers has enabled Advanced Currency Management.

How is the converted amount data reported on a report that spans time periods when the exchange rate was different?

- A. Converted amounts are based on exchange rates that use the oldest entry.
- B. Converted amounts are based on the exchange rates entered in the opportunity.
- C. Converted amounts are based on exchange rates that use the current entry.
- D. Converted amounts are based on the historical exchange rate associated with the close date.

**Answer:** D

#### NEW QUESTION 20

Universal Containers wants to improve sales productivity in inside sales and is has been advised to consider Salesforce Console for Sales. Which two use cases justify this recommendation? (Choose two.)

- A. Need to add notes quickly while talking to the client.
- B. Need to view the caller ID on screen and quickly make calls with one click.
- C. Need to prioritize search results for contacts and opportunities.
- D. Need to chat with customers in real time with Chatter.

**Answer:** AB

#### NEW QUESTION 22

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 23

Universal Containers wants to prevent sales users from modifying certain opportunity fields when the sales stage has reached Negotiation/Review. However, sales directors must be able to edit these opportunity fields in case last minute updates are required. Which solution should a consultant recommend?

- A. Modify the profile for sales directors to enable the "Modify All" object permission for opportunities.
- B. Change the field-level security for sales representatives to restrict field access based on the sales stage.
- C. Create a validation rule to enforce field access based on the sales stage and a custom permission.
- D. Create a workflow rule to enable field access for sales directors based on the sales stage.

**Answer:** C

#### NEW QUESTION 27

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 29

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 30

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 32

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 34

Universal Containers requires its sales representatives to go through an internal certification process to sell certain groups of products. Which two actions prevent a sales representative from adding these products to opportunities if they are NOT certified to sell them? Choose two answers.

- A. Use a validation rule on opportunity products to prevent them from adding products marked as required certification if they are NOT certified.
- B. Use a validation rule on products marked as requiring certification to prevent them from being added to an opportunity.
- C. Use a criteria-based sharing rule on products marked as requiring certification to only share the products to users who are certified.
- D. Use a separate price book for the products requiring certification and only share the price book to users who are certified.

**Answer:** AD

#### NEW QUESTION 38

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 40

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 42

The members of an opportunity team at Universal Containers are working together to close an opportunity. The sales engineer on the team is having trouble keeping up with the active quote. How can the sales engineer identify the opportunity's active quote?

- A. Reference the last modified date on the quotes.
- B. Reference the synced quote field on the opportunity record.
- C. Reference synced quote history on the opportunity.
- D. Follow the opportunities' quotes in Chatter.

**Answer:** B

#### NEW QUESTION 47

A premier customer for Universal Containers needs access to confidential product roadmap information. Which two steps should a sales representative take to securely send this information using content delivery? Choose two answers.

- A. Remove access to content after a specified date.
- B. Require the customer to enter a password to view the content.
- C. Require the customer to enter a security token to download the content.
- D. Require the recipient to log into Salesforce to access the content.

**Answer:** AB

#### NEW QUESTION 52

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 57



Universal Containers has configured a private sharing model with opportunity team selling enabled. The company allows its sales representatives to add sales team members to their opportunities when necessary. As a result, each sales representative has opportunities they directly manage and opportunities on which they collaborate with other sales representatives. Which data set filter report would allow the sales representatives to see all opportunities they are involved with?

- A. My team-selling and my opportunities
- B. My team-selling shared opportunities
- C. My team's opportunities
- D. My collaborative opportunities

**Answer:** A

#### NEW QUESTION 60

Universal Containers plans to implement lead management functionality for channel sales representatives who need to push pre-qualified leads to their partners. Partners need the ability to access and update the leads assigned to them. Which solution should a consultant recommend for this scenario?

- A. Create a customized site where partners can self-register and access their leads.
- B. Configure a separate lead record type and page layout for the Partner Community.
- C. Create a task for a partner when a new lead is created and assign the task to the partner in the Partner Community.
- D. Add the leads tab to the Partner Community and configure partner profiles to access leads.

**Answer:** D

#### NEW QUESTION 64

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 65

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 66

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 69

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