

Salesforce

Exam Questions CRT-251

Salesforce Certified Sales Cloud Consultant (SU18)



NEW QUESTION 1

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 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

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

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 5

Universal Containers is planning to implement Salesforce Sales Cloud to support its professional services division. The Universal Containers sales team wants to easily see customer purchasing activity on account, contact, and contact detail pages. What should a consultant recommend to meet this requirement?

- A. Enable Salesforce Console for Sales to see customer purchasing activity.
- B. Create a global publisher action to view all customer purchasing activity.
- C. Enable the Orders object in Salesforce to track customer purchases.
- D. Create a custom object related to the account, contact, and contract objects.

Answer: C

NEW QUESTION 6

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 7

Universal Containers has a private sharing model for accounts and opportunities. Each sales representative is assigned to work with a desiccated sales engineer. The sales engineer will need access to their assigned sales representatives' accounts and opportunities. What should a consultant recommend to meet this requirement?

- A. Have the sales representatives manually share the accounts and opportunities with their assigned sales engineers.

- B. Create criteria-based sharing rules to share the accounts and opportunities with sales engineer.
- C. Enable account teams selling and have each sales representative configure their default teams.
- D. Create a trigger to add the sales engineers to their sales representatives' account and opportunity teams.

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

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 10

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 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 15

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 17

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 20

Universal Containers has a large sales department that is dispersed worldwide. Sales managers want greater visibility into the opportunities in progress with their respective teams and want to receive email notifications when opportunities reach key metrics (e.g. progress to a certain stage or reach a specific probability). However, individuals want to control the frequency of their email notifications. Which two solutions should a consultant recommend? Choose two answers.

- A. Configure the individual Salesforce for Outlook email settings to control notification frequency.
- B. Configure Chatter Feed Tracking to provide updates for the key metrics the sales managers are looking for.
- C. Create a report filtering for the desired criteria and individuals subscribe to the report.
- D. Define a workflow rule and email task that is triggered when key fields are updated to new values.

Answer: BC

NEW QUESTION 21

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 24

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 28

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 33

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 35

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 36

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 38

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 40

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 shard 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 45

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 48

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 49

What is the recommended approach to relate a Person Account to another Account?

- A. Add the Person Account to the Contact Roles.
- B. Add the Person Account to the Account owner's default team.
- C. Add the Person Account to the Partners Related List.
- D. Add the Person Account to the Account Team.

Answer: C

NEW QUESTION 51

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 56

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 60

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 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 67

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 69

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 71

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