

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 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 3

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 4

Universal Containers does NOT have a direct sales team; its channel partners are responsible for selling and servicing products. Over the past quarter, there has been an increased volume of leads. However, the Vice President of Channels has been receiving many complaints from partners on the poor quality of the leads and has noticed a significant drop in the lead conversion rate. What should a consultant recommend to improve partner satisfaction with the leads being shared?

- A. Assign all leads to the partner channel manager to validate the lead data and manually assign to partners.
- B. Create multiple validation rules to ensure that all fields on the lead record are populated with data.
- C. Create a custom lead score field to assess lead quality and assign the leads that exceed this score to partners.
- D. Use the lead score on the Find Duplicates button and assign the leads with a score in the high category.

Answer: C

NEW QUESTION 5

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 6

Universal Containers supports two lines of business: shipping and freight. The sales cycle for freight deals is more complex and involves more stages than the shipping sales cycle.

Which solution should a consultant recommend to meet these business requirements?

- A. Create different record types and sales processes for each line of business, and assign different stages to each page layout.
- B. Create different record types and sales processes for each line of business, and use workflow field updates to assign stages.
- C. Create different record types and sales processes for each line of business, and assign different page layouts to each record type.
- D. Create different record types and sales processes for each line of business, and assign different sales processes to each page layout.

Answer: C

NEW QUESTION 7

Universal Containers uses a custom object named "Analysis", which is the child in a master-detail relationship with the Opportunity object. Sales teams use this object to create requests for supporting research. Sales teams use the Salesforce Mobile App and want to easily create new Analysis records from their phones. What should a consultant recommend to meet this requirement?

- A. Create a Visualforce page.

- B. Create an Action.
- C. Create a related list button.
- D. Create a custom object tab.

Answer: D

NEW QUESTION 8

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 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 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 13

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 16

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 18

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 21

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 22

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 27

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 32

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 34

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 35

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 36

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 40

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 42

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 43

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 47

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 49

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 52

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 falls 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 53

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 55

A lead sharing rule has been defined so that leads owned by the record owner are shared with the public group called "Sales Team."

Who will have access to these records, assuming that a private sharing model is in place on these objects and there are no sharing rules defined for those objects, when the lead is converted to an account, contact, and opportunity?

- A. The record owner will be the only person who is able to access the account, contact, and opportunity records.
- B. The record owner, all members of the public group, and a group called "Sales team" will be able to access the three records.
- C. The record owner and anyone above the record owner in the role hierarchy will be able to access the three records.
- D. The record owner, all members of the public group, and a group called "Sales team", and anyone above any group member in the role hierarchy will be able to access the three records.

Answer: C

NEW QUESTION 59

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