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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 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 4
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 5
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 6
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 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 Lighting 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 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 9
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 10
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 10
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 15
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 17
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 18

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 20
Universal Containers has enables 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 23
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 27
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 31
Universal Containers wants to prevent sales users form 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 36
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 40
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 41
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 42
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 44
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 47
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 51
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 56
Universal Containers wants to implement a website for a new product launch. The site should be publicly available, allow visitors to submit requests for information, and be managed by the non-technical marketing team.
Which solution should the consultant recommend?

A. Lightning Platform
B. Salesforce Mobile Sites
C. Lightning Components
D. Customer Community

Answer: D

NEW QUESTION 60

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 63
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 68
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 73
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 76
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 79
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 83
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 87
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 92
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 leas 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 95
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 96
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 101
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 103
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 106
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