CRT-251 Dumps

Salesforce Certified Sales Cloud Consultant (SU18)

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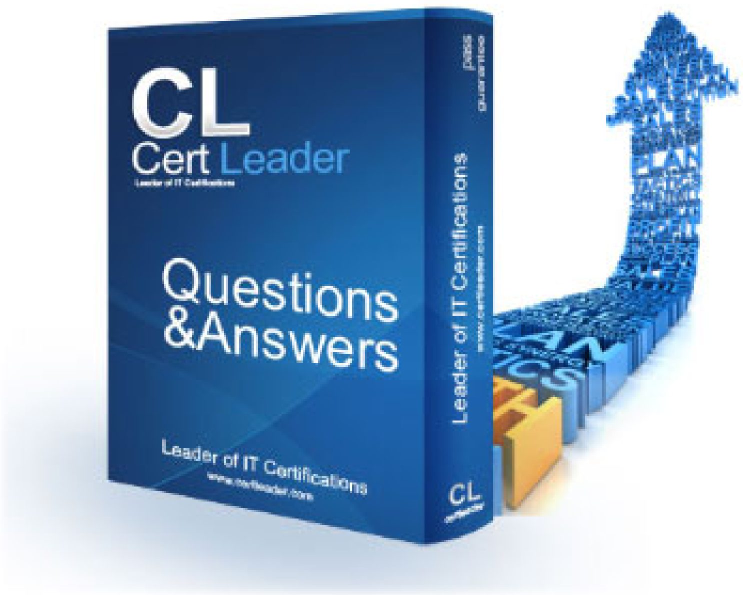

NEW QUESTION 1
Universal Containers has a customer base that includes both individual consumers and businesses. The company has implemented Person Accounts in Salesforce and has a custom object for “Policies” that needs to relate to both Person Accounts and business accounts.
What is the minimum configuration 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 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 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
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 10
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 14
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
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 18
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 23
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 25
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 29
A consultant has created a custom formula field on Opportunity that multiples the Opportunity Amount by the Account's Discount field. Which Currency will the formula field use for its value if the Opportunity and the Account records have different Currencies?

A. The Account currency
B. The User currency
C. The Corporate currency
D. The Opportunity currency

Answer: B

NEW QUESTION 34
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 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 39
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 40
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 44
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 45
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 46
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 51
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 53
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 54
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 55
Universal Containers wants to improve the accuracy of its current sales forecast. It also wants to improve the relevance of its sales stages and the role they play in the sales process.
How should the relationship between the various elements of the sales process be defined to meet these requirements?

A. Map sales probability values to forecast categories; assign sales stages accurate percentages.
B. Map forecast probability to opportunity probability; assign appropriate sales stage.
C. Map appropriate sales stage to opportunity stage; assign accurate forecast probability.
D. Map opportunity stages to forecast categories; assign accurate probability to each stage.

Answer: D

NEW QUESTION 58
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 63
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 68
Universal Containers acquires sales leads each year through trade shows. Occasionally, duplicate leads are generated when the marketing team imports leads that already exist in the system. What should a consultant recommend to prevent duplicate leads in the system?

A. Upload the leads to Data.com to remove the duplicates and select the option to have them automatically imported.
B. Upload the leads and click the “Find Duplicates” button for each of the leads to identify potential duplicate lead records.
C. Upload the leads using Data Loader and enable the “Find Duplicates” setting to prevent duplicate records.
D. Upload the leads using Data Import Wizard and select the appropriate field to match duplicates against existing records.

Answer: D

NEW QUESTION 71
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