# 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 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 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 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 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 5**
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 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 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**
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 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**
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 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 13**
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 16**
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 19**
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 24**
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 29**
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 34**
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 39**
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 40**
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 41**
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 44**
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 49**
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 54**
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 58**
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 60**
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 61**
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 65**
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 69**
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 72**
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