

Exam Questions CRT-251

Salesforce Certified Sales Cloud Consultant (SU18)

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NEW QUESTION 1

Universal Containers' current solution for managing its forecasts is cumbersome. The sales managers do NOT have visibility into their teams' forecasts and are NOT able to update the forecasts. As a result, the managers are continually asking their sales representatives to provide updated forecast data via email or phone. Which two solutions should a consultant recommend to help Universal Containers improve the management of their forecasts? Choose two answers.

- A. Enable override forecast permission in the Manager's profile.
- B. Configure weekly customized forecast reports and dashboards to be emailed to sales management.
- C. Create a forecast hierarchy and assign managers to the forecast manager role.
- D. Create forecast Chatter groups where sales representatives can post and share their forecasts.

Answer: AC

NEW QUESTION 2

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 3

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 4

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 5

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 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

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 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 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 10

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 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 20

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 22

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 27

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 28

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 30

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 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 36

A consultant has created a custom formula field on Opportunity that multiplies 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 41

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 44

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 45

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 46

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 50

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 52

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 55

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 59

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 64

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 65

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 66

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 70

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 72

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 74

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