

**Exam Code: Revenue Cloud Consultant Accredited Professional**

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## Exam A

### QUESTION 1

Universal Containers has setup a partner type custom field on the CPQ quote object in order to ensure partners receive discounts. Setting the partner type on the quote should cause a recalculation because the field is an input to the product prices. How can the partner type trigger a new calculation for the quote?

- A. Add the partner type field to the calculating fields field set
- B. Refresh post install scripts
- C. Setup a quote calculator plugin to ensure the custom field triggers calculation
- D. Include the field in a custom metadata setting

**Correct Answer: A**

**Section:**

**Explanation:**

In Salesforce CPQ, if a custom field is an input to product prices and you want a change in this field to trigger a recalculation, you should add this field to the calculating fields field set. This is because Salesforce CPQ's Advanced Quote Calculator determines quote and quote line prices in response to user or automated actions. Therefore, adding the 'partner type' field to the calculating fields field set will ensure that setting the partner type on the quote triggers a new calculation. Reference: The CPQ Quote Calculation Sequence - Salesforce

### QUESTION 2

Universal Containers sell a product bundle named "Corporate IT Solutions". One of the product options inside this bundle is named Hardware Firewall. Universal Containers has a requirement where if the customer has purchased a hardware firewall in the past, the hardware firewall product option should be hidden while configuring the bundle. The CPQ admin has created a product rule to handle this requirement. What should the evaluation event of the product rule be set to?

- A. Always
- B. Save
- C. Load and Edit
- D. Load

**Correct Answer: C**

**Section:**

**Explanation:**

In Salesforce Revenue Cloud, the evaluation event of a product rule specifies when the rule should be evaluated. The options are:

Load: The rule will be evaluated when the product bundle is opened.

Edit: The rule will be evaluated when the product bundle is edited.

Save: The rule will be evaluated upon Save.

Always: The rule will be evaluated during any event.

In the context of the question, the requirement is to hide the hardware firewall product option while configuring the bundle if the customer has purchased a hardware firewall in the past. This means that the rule needs to be evaluated when the product bundle is being edited, not just when it is loaded or saved. Therefore, the correct answer is "Load and Edit".

Reference:

Salesforce CPQ Product Rules: General Considerations

Decide When Rules Evaluate Unit | Salesforce Trailhead

Product Rules - Salesforce

### QUESTION 3

Should Bundles be a scoping topic of discussion as part of a CPQ project?

- A. Yes, bundle configuration is a necessary part of CPQ and it should always be implemented.
- B. Yes, bundle Configuration should be introduced and it's up to the customer to decide whether they need it or not.
- C. No, if the customer is not using bundle configuration currently, they won't need it in the future.
- D. No, it is safe to assume that the customer doesn't need bundle configuration unless it's brought up specifically.

**Correct Answer: B**

**Section:**

**Explanation:**

In Salesforce CPQ, a bundle is a group of products that are known to be sold together. There are three types of bundles: static, configurable, and nested. The bundle configuration is a significant part of CPQ, and it can make selling complex product offerings easier by providing sales reps with premade product bundles to choose from. However, whether a customer needs a bundle configuration or not depends on their specific needs and preferences. Therefore, it's important to introduce the concept of bundle configuration as part of a CPQ project, but the decision to implement it should be left up to the customer. Reference

Learn About Configuration in the Sales Process - Trailhead

Product Bundles in Salesforce CPQ - SkyPlanner

#### QUESTION 4

Universal Containers sell boxes based on size, Price for a specific product is based on the selection of length and width and height, which CPQ pricing functionality should be used here?

- A. Percent of total
- B. Multi Dimensional Quoting
- C. Discount Schedule
- D. Price Rule with lookup table

**Correct Answer: B**

**Section:**

**Explanation:**

Multi Dimensional Quoting (MDQ) is a pricing functionality in Salesforce CPQ that allows you to break a long subscription into smaller segments, such as months, quarters, or years, and apply different quantities, discounts, or uplifts to each segment. This way, you can offer flexible and customized pricing to your customers based on their needs and preferences. For example, if you sell boxes based on size, you can use MDQ to create a quote with different prices for different dimensions of the boxes, such as length, width, and height. You can also adjust the prices for each dimension based on the duration of the subscription, such as offering a lower price for the first year and a higher price for the second year. MDQ helps you to create complex and dynamic quotes with ease and accuracy, and increase customer satisfaction and loyalty. Reference:

Create a Multidimensional Quote

Revenue Management Platform & CPQ Solution

Explain Multi Dimensional Quoting (Price Dimension) in Salesforce CPQ

#### QUESTION 5

How does Hold Billing work?

- A. It Prevents invoice document generation and stops email notifications from going out to the customer.
- B. The Hold Billing field is set to "yes" until the order is activated. Upon order activation the field will be automatically set to "no".
- C. It suspends invoicing for that order product until the field is set to "no", Invoices lines will be created to account for the time when hold billing was set to "yes"
- D. It suspends invoicing for that order product until the field is set to "no", Invoices lines will be created only for invoices after hold billing was set to "yes".

**Correct Answer: C**

**Section:**

**Explanation:**

Hold Billing is a feature of Salesforce Revenue Cloud that allows businesses to control when an order product is invoiced, based on certain criteria or events. By setting the Hold Billing field to Yes on an order product, the billing process is paused for that order product and all its usage summaries. This means that no invoice lines or invoice documents are generated for the order product until the hold is released. The hold can be released by setting the Hold Billing field to No or null, either manually or automatically through a workflow or trigger. When the hold is released, Salesforce Billing will create an invoice as soon as possible, and include all the invoice lines



that were accumulated during the hold period. This ensures that the customer is billed for the full amount of the order product, regardless of the hold duration. For example, if an order product has a monthly billing frequency and a hold billing period of two months, the first invoice after the hold will include three invoice lines: one for the current month and two for the previous months when the hold was active. Reference: [https://help.salesforce.com/s/articleView?id=sf.blng\\_hold\\_billing.htm&language=en\\_US&type=5](https://help.salesforce.com/s/articleView?id=sf.blng_hold_billing.htm&language=en_US&type=5)  
<https://trailhead.salesforce.com/users/officialblaze/trailmixes/revenue-cloud-get-started-with-billing>

#### QUESTION 6

Universal Containers has three product families—hardware, software and services, their sales reps want to be able to view the net totals of various product families at the quote level. In order to support this, the CPQ admin has created three price rules that use summary variables to add the net total for quote lines that belong to a particular product family and intend to populate the sums to custom fields on the quote record. From a performance standpoint, which of the following is true?

- A. it would be better to create separate quotes for each of the product families
- B. it would be better to use a single price rule with 3 price actions
- C. it would be better to create separate quote line groups for each of the product families and then use quote line group auto-summary functionality
- D. the current solution with 3 separate price rules is the most optimal solution

**Correct Answer: B**

**Section:**

**Explanation:**

Salesforce CPQ (Configure, Price, Quote) allows admins to automate price calculations and update quote line fields. In the context of Universal Containers, they have three product families and want to view the net totals of these families at the quote level. The current solution involves creating three separate price rules that use summary variables to add the net total for quote lines that belong to a particular product family. However, from a performance standpoint, it would be more efficient to use a single price rule with three price actions. This is because price rules can inject a static value, field value, or summary variable into a quote or quote line field. Therefore, having a single price rule with multiple price actions can streamline the process and improve performance. Reference: 12

#### QUESTION 7

Universal Containers is preparing to go live with Salesforce CPQ however sales management has stated that they would like recurring revenue captured on opportunity line item object to reference within existing pipeline reports. Annual revenue is currently captured in the field ARR\_c on the SBQQ QuoteLine\_\_c object. Which is the most efficient solution?

- A. Create ARR\_c on the opportunity Line item object, and create a price rule to copy the value from ARR\_c on SBQQ QuoteLine\_\_c on opportunity Product.
- B. Create ARR\_c on the opportunity Line item object, and create a flow to copy the value from ARR\_c on SBQQ QuoteLine C.
- C. Create ARR\_\_c on the opportunity Line item object, matching the field configuration of ARR\_c on SBQQ QuoteLine C.
- D. Create a cross object formula field on the opportunity line item to reference ARR\_c data SBQQ QuoteLine C.

**Correct Answer: A**

**Section:**

**Explanation:**

The Salesforce CPQ (Configure, Price, Quote) system allows for the creation of custom fields on the Opportunity Line Item object, such as ARR\_c, to capture recurring revenue. This can be used in conjunction with a price rule to copy the value from the corresponding field (ARR\_c) on the SBQQ QuoteLine\_\_c object. This solution is efficient as it leverages the existing structure and functionality of Salesforce CPQ, allowing for the seamless integration of recurring revenue data into existing pipeline reports. Reference:

Salesforce Revenue Cloud documents and learning resources

Salesforce Introduces Revenue Cloud to Help Businesses Accelerate Revenue Growth Across Any Channel

Get Started with Revenue Intelligence

Introduction to Revenue Intelligence for Sales Cloud

Getting Started: Revenue Cloud: Salesforce Billing

CPQ Object Relationships - Salesforce

Object Reference for the Salesforce Platform

Salesforce CPQ Clone with Related Button to clone Quotes to a new ...

Troubleshoot Salesforce CPQ Opportunity and Quote sync issues

Bundle configuration errors 'does not belong to SObject Type' or ...

Salesforce Revenue-Cloud-Consultant-Accredited-Professional Quiz 1 ...

### QUESTION 8

Which 3 objects are updated when posting an invoice?

- A. Order Product
- B. Quote
- C. Invoice Line
- D. Quote Line
- E. Invoice

**Correct Answer: A, C, E**

**Section:**

**Explanation:**

Order Product: The status of the Order Product is updated when the corresponding Invoice Line is posted. The fields such as 'Invoice Run Processing Status', 'Next Billing Date', 'Next Charge Date', and 'Last Charge To Date' are updated for the next period<sup>1</sup>.

Invoice Line: The Invoice Line object is updated when an invoice is posted. This includes locking the Invoice Line from further changes and finalizing the agreement represented by the invoice<sup>2</sup>.

Invoice: The Invoice object itself is updated when an invoice is posted. This includes changing the status of the invoice from 'Draft' to 'Posted', which locks the invoice from further changes and makes it ready for revenue recognition reporting<sup>2</sup>.

It's important to note that posting an invoice finalizes the agreement and prevents deletion of the invoice or any of its invoice lines. This ensures that your organization always has a record for legal and bookkeeping purposes<sup>2</sup>.

Posting Invoices - Salesforce

Best Practices to Implement Invoice Runs With Salesforce Billing

Unable to Post an Invoice that is in Draft Status - Salesforce

Cancel or Post Invoice Lines in Draft status while Invoice ... - Salesforce

### QUESTION 9

Sales reps at UC were facing governor limits while configuring certain large bundles, the admin at UC has set the 'enable large configurations package settings to TRUE now the users are experiencing longer loading times between saving a bundle configuration and returning to the quote line editor, even for smaller bundles. What should the admin do to resolve this issue?

- A. Enable Large configuration on the bundle parents where needed by selecting the product's enable large configuration field
- B. Recommend CPQ and billing design solutions within proper capabilities
- C. All bundles that have more than 20 product should be split into smaller bundles
- D. Enable large configurations setting should not be used in such a case

**Correct Answer: A**

**Section:**

**Explanation:**

Enable Large Configurations on Specific Bundles: Instead of enabling large configurations globally for all bundles, consider selectively enabling it only on the bundle parents where it is needed. By doing so, you can avoid affecting smaller bundles that don't require large configurations. This approach allows you to optimize performance while still benefiting from large configurations where necessary.

Review CPQ and Billing Design Solutions: Take a closer look at your CPQ and billing design. Ensure that your configuration models, pricing rules, and quote line editor settings are well-optimized. Sometimes, design choices can impact performance. Consider consulting Salesforce documentation and best practices to fine-tune your implementation.

Avoid Unnecessary Use of Large Configurations: While large configurations can handle complex bundles, they may not be needed for smaller bundles with fewer products. Evaluate each bundle's complexity and enable large configurations only when necessary. Avoid using it indiscriminately across all bundles.

Salesforce Enable Large Configurations Documentation

Salesforce Trailhead: Understand Scalability

Salesforce Revenue Cloud Overview

### QUESTION 10

What fields are required on the usage record to load and rate the usage?

- A. start date time,end date time,matching attribute,unit of measure,quantity,usage summarylookup
- B. start date time,order product ID,unit of measure,quantity,usage summary lookup,account
- C. Account,order,order product,usage summary start date time,end date time,quantity
- D. start date time,end date time,matching ID,matching Attribute,Unit of measure,quantity

**Correct Answer: D**

**Section:**

**Explanation:**

In Salesforce Revenue Cloud, usage records are a key component of the usage-based pricing model.They track the consumption of a product or service over a predefined time period<sup>1</sup>.

The required fields on the usage record to load and rate the usage are:

Start Date Time: This field represents the start of the usage period<sup>1</sup>.

End Date Time: This field represents the end of the usage period<sup>1</sup>.

Matching ID: Salesforce Billing uploads usage only to usage summaries with matching IDs<sup>1</sup>.

Matching Attribute: Usages are rated against usage summaries where the Matching ID, Matching Attribute, and Unit of Measure fields all match<sup>1</sup>.

Unit of Measure: This field represents the unit in which the usage is measured<sup>1</sup>.

Quantity: This field represents the amount of usage<sup>1</sup>.

These fields are essential for accurately tracking and billing usage-based products or services.They allow Salesforce Revenue Cloud to calculate charges based on the actual consumption of a product or service, which can be more flexible and customer-friendly than flat-rate pricing<sup>2</sup>.

Reference

Usage Summary and Usage Fields - Salesforce

Usage-Based Products - Salesforce

#### QUESTION 11

what 3 design examples will negatively impact the scale and performance of the revenue cloud implementation?

- A. multiple automation types (trigger/workflows,flows)on a single object
- B. External API calls within the pricing sequence
- C. extensive use of quote line custom fields
- D. routine generation of quote having 200 quote lines
- E. routine generation of invoices having 200 invoice lines

**Correct Answer: A, B, C**

**Section:**

**Explanation:**

The three design examples that will negatively impact the scale and performance of the Revenue Cloud implementation are:

A .Multiple automation types (trigger/workflows,flows) on a single object: Having multiple automation types on a single object can lead to complex and inefficient processes.This can slow down the system and negatively impact the performance and scalability of the Revenue Cloud implementation<sup>1</sup>.

B .External API calls within the pricing sequence: Making external API calls within the pricing sequence can introduce latency and potential points of failure.This can slow down the pricing process and negatively impact the performance and scalability of the Revenue Cloud implementation<sup>1</sup>.

C .Extensive use of quote line custom fields: Using a large number of custom fields can increase the complexity and size of the data model.This can slow down queries and negatively impact the performance and scalability of the Revenue Cloud implementation<sup>1</sup>.

<https://trailhead.salesforce.com/content/learn/modules/scalability-with-salesforce/understand-scalability-at-salesforce>

Design examples that can negatively impact the scale and performance of the Revenue Cloud implementation include using multiple automation types on a single object, making external API calls within the pricing sequence, and extensively using custom fields on quote lines. Multiple automations on a single object can lead to complex logic processing and increased execution times, impacting overall system performance. External API calls within pricing sequences can introduce latency and potential points of failure, affecting the responsiveness and reliability of pricing calculations. Additionally, an excessive number of custom fields on quote lines can increase the data load and processing time during quote generation and manipulation, further degrading system performance. These design considerations are critical for maintaining optimal performance and scalability in Revenue Cloud implementations.

### QUESTION 12

Which Type of Documentation comes first in a Salesforce cpq scoping session?

- A. Order Management
- B. Products and Bundles
- C. Business Process Mapping
- D. Quote Documentation And Pulggins

**Correct Answer: C**

**Section:**

**Explanation:**

In a Salesforce CPQ scoping session, the first type of documentation that comes into play is the Business Process Mapping. This is because before diving into the specifics of products, bundles, order management, or quote documentation, it's crucial to understand the client's overall business processes. Business Process Mapping provides a visual representation of the client's business processes, which can help identify inefficiencies, redundancies, and gaps in the current process. It also helps in understanding how the Salesforce CPQ solution can be best configured to align with and optimize these processes. Reference: Salesforce CPQ documentation.

### QUESTION 13

Which 3 Customer Teams Should be invited to participate in scoping revenue cloud project?

- A. Information Technology
- B. Sales operations
- C. Accounting and finance
- D. Customer Service
- E. Human Resource

**Correct Answer: A, B, C**

**Section:**

**Explanation:**

When scoping a Revenue Cloud project, it's essential to involve key customer teams that will be impacted by or contribute to the implementation. These teams typically include Information Technology, which will handle the technical aspects of the implementation; Sales Operations, which is responsible for the processes and strategies surrounding the sales efforts; and Accounting and Finance, which will manage billing, invoicing, and financial reporting aspects of the solution. Involving these teams ensures that all necessary requirements are captured and that the solution aligns with the organization's technical capabilities and business processes.

### QUESTION 14

What is the successful exit criteria that completes the User Acceptance Testing (UAT) phase?

- A. Customer Acceptance sign off
- B. Complete deployment migration plan
- C. A Change Order
- D. A Design Document
- E. Migration from Sandbox to Production

**Correct Answer: A**

**Section:**

**Explanation:**

INVEST is an acronym that stands for Independent, Negotiable, Valuable, Estimable, Small, and Testable. It is a set of criteria used to assess the quality of a user story in Agile methodologies. Here's what each term means:  
Independent: The user story should be self-contained, in a way that there is no inherent dependency on another user story.

Negotiable: User stories, up until they are part of an iteration, can always be changed and rewritten.

Valuable: A user story must deliver value to the end user.





Estimable: You must always be able to estimate the size of a user story<sup>12</sup>.

Small: User stories should not be so big as to become impossible to plan/task/prioritize with a certain level of certainty<sup>12</sup>.

Testable: The user story or its related description must provide the necessary information to make test development possible<sup>12</sup>. Reference: <sup>12</sup>

<https://blog.logrocket.com/product-management/writing-meaningful-user-stories-invest-principle/>

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#### QUESTION 15

Which three customer teams should be invited to participate in scoping a Revenue Cloud project?

- A. Human Resources
- B. Customer Service
- C. Accounting and Finance
- D. Sales Operations
- E. Information Technology

**Correct Answer: C, D, E**

**Section:**

**Explanation:**

Scoping a Revenue Cloud project involves understanding the business needs, defining the project goals, and planning the implementation strategy<sup>12</sup>. The teams that should be involved in this process are those that have a direct stake in the project's outcome and can provide valuable input into the project's requirements<sup>12</sup>. These teams typically include:

Accounting and Finance: This team can provide insights into the financial processes that the Revenue Cloud project will support, such as billing, revenue recognition, and financial reporting<sup>12</sup>.

Sales Operations: This team can provide insights into the sales processes that the Revenue Cloud project will support, such as quote-to-cash, contract management, and sales forecasting<sup>12</sup>.

Information Technology: This team can provide technical expertise and support for the implementation of the Revenue Cloud project, including system integration, data migration, and IT infrastructure<sup>12</sup>. Reference: <sup>12</sup>

#### QUESTION 16

After a Contract has been created and activated, what is an appropriate use of automation to support renewals?

- A. Renewal Quoted should be checked as early as possible, and Renewal Forecasted should be checked when the quote is due for renewal
- B. Check both Renewal Forecasted and Renewal Quoted fields simultaneously, as soon as the contract is activated
- C. Check both Renewal Forecasted and Renewal Quoted fields simultaneously, closest to the renewal date
- D. Renewal Forecasted should be checked as early as possible, and Renewal Quoted should be checked near Contract End Date

**Correct Answer: D**

**Section:**

**Explanation:**

Salesforce Revenue Cloud allows businesses to automate key processes related to recurring revenue models<sup>1</sup>. The 'Renewal Forecasted' field should be checked as early as possible to allow for accurate forecasting and planning. This helps businesses anticipate future revenue and make informed decisions about resource allocation and strategy. On the other hand, the 'Renewal Quoted' field should be checked closer to the Contract End Date. This is because the quote for renewal is typically generated and sent to the customer near the end of the contract term, allowing for any changes in pricing, terms, or services to be included<sup>21</sup>. Reference

Revenue Cycle Management Software by Revenue Cloud - Salesforce

Salesforce Introduces Revenue Cloud to Help Businesses Accelerate Revenue Growth Across Any Channel - Salesforce Sales

Manage Contracts and Renewals Unit | Salesforce Trailhead

A Guide to Recurring Revenue Enablement with Salesforce

#### QUESTION 17

What three key considerations for legacy data migration will expand the project scope of a Revenue Cloud implementation?

- A. Fragmented and incomplete information will need to be aggregated and validated, otherwise the solution will yield unexpected results
- B. Extracting from multiple sources takes additional resources and time to access and process



- C. The creation of external objects will bypass the need for legacy data migration
- D. The Amendments and Renewals process will be subject to customizations
- E. Large volumes of data take a longer time to load.

**Correct Answer: A, B, E**

**Section:**

**Explanation:**

Legacy data migration is a critical aspect of a Revenue Cloud implementation and certain considerations can indeed expand the project scope:

A . Fragmented and incomplete information will need to be aggregated and validated, otherwise the solution will yield unexpected results: Data quality is a key factor in any data migration project.If the legacy data is fragmented or incomplete, additional effort will be required to aggregate and validate the data before it can be migrated to the new system1.

B . Extracting from multiple sources takes additional resources and time to access and process: If the legacy data resides in multiple sources, it can increase the complexity of the data extraction process.This can require additional resources and time, thus expanding the project scope1.

E . Large volumes of data take a longer time to load: The volume of data to be migrated can significantly impact the time required for the data load process.Large volumes of data can take a longer time to load, which can extend the project timeline2.

C . The creation of external objects will bypass the need for legacy data migration: While creating external objects can help integrate external data sources with Salesforce, it doesn't necessarily bypass the need for data migration.The data still needs to be accessible and in a format that Salesforce can understand3.

D .The Amendments and Renewals process will be subject to customizations: While amendments and renewals are important aspects of the CPQ process, they are not directly related to the data migration process3.

#### QUESTION 18

What does RASIC stand for?

- A. Responsible, Actionable, Supporting, Informed, Consulted
- B. Responsible, Actionable, Supporting, Informed, Communicate
- C. React, Action, Support, Informed, Consulted
- D. Responsible, Accountable, Supporting, Informed, Consulted



**Correct Answer: D**

**Section:**

**Explanation:**

RASIC is an acronym used in project management to define the roles and responsibilities of each person who interacts with the project. Each letter represents a designated role in a task's completion:

R (Responsible): This is the task lead -- the individual who is ultimately responsible for getting the job done. There should only be one person responsible.

A (Accountable): This is the person, or people, who will approve or deny the task once it's complete. The person responsible can also play this role, but it can also be a technical expert or stakeholder.

S (Supporting): The individual(s) in this role actively work on the task and help the person responsible.

I (Informed): The individual(s) in this role need to be informed of the task's progress and any decisions being made. These are the people who need to know when the task is complete.

C (Consulted): People in this role offer advice or guidance but do not actively work on the task.These are often subject matter experts who offer guidance or one-time technical reviews1.

Reference

Defining Roles and Responsibilities on a Project (RASIC) - Nexight Group

#### QUESTION 19

What does INVEST stand for in the INVEST criteria when defining user stories?

- A. Investable, Negotiable, Valuable, Estimable, Small, Testable
- B. Independent, Negotiable, Valuable, Estimable, Sequential, Testable
- C. Independent, Negotiable, Valuable, Equal, Small, Testable @
- D. Independent, Negotiable, Valuable, Estimable, Small, Testable

**Correct Answer: D**

**Section:**

**Explanation:**

INVEST is an acronym that stands for Independent, Negotiable, Valuable, Estimable, Small, and Testable<sup>12</sup>. It is a set of criteria used to assess the quality of a user story in Agile methodologies<sup>12</sup>. Here's what each term means:

Independent: The user story should be self-contained, in a way that there is no inherent dependency on another user story<sup>12</sup>.

Negotiable: User stories, up until they are part of an iteration, can always be changed and rewritten<sup>12</sup>.

Valuable: A user story must deliver value to the end user<sup>12</sup>.

Estimable: You must always be able to estimate the size of a user story<sup>12</sup>.

Small: User stories should not be so big as to become impossible to plan/task/prioritize with a certain level of certainty<sup>12</sup>.

Testable: The user story or its related description must provide the necessary information to make test development possible<sup>12</sup>. Reference: <sup>12</sup>

**QUESTION 20**

Which two steps should an implementation team take to integrate Revenue Cloud to another system?

- A. Share printed quote form with the customer to manually enter in their ERP
- B. Complete a source to target mapping of the fields that will integrate between systems
- C. Load quote fields and values in a file and share that with the Customer
- D. Design an architecture view of how data integrates and flows between systems

**Correct Answer: B, D**

**Section:****Explanation:**

The steps that an implementation team should take to integrate Revenue Cloud with another system are:

B . Complete a source to target mapping of the fields that will integrate between systems: This step involves defining how data fields in Revenue Cloud correspond to data fields in the external system. It is crucial for ensuring accurate data flow and integration functionality between the systems.

D . Design an architecture view of how data integrates and flows between systems: This involves creating a detailed architectural blueprint that outlines how data will be transferred and managed between Revenue Cloud and the external system. It helps in identifying potential integration challenges and ensuring that the integration supports the business processes effectively.

These steps are based on best practices in systems integration, focusing on data consistency and integrity, along with a structured approach to designing integration flows.

**QUESTION 21**

What are two benefits to having trained customer CPQ admins participate in the planning, design and build phases?(Q2R)

- A. Facilitates a more efficient test phase
- B. Eliminates the need for documentation
- C. Increases the commercial value to the paid engagement
- D. Presents more opportunity for customers to ask for new requirements
- E. Customer is better equipped to scale and maintain functionality post-go-live

**Correct Answer: A, E**

**Section:****Explanation:**

The benefits of having trained customer CPQ admins participate in the planning, design, and build phases include:

A . Facilitates a more efficient test phase: Trained CPQ admins can leverage their understanding of both the platform's capabilities and the company's specific requirements to craft more effective tests and more quickly identify potential issues.

E . Customer is better equipped to scale and maintain functionality post-go-live: With deep involvement in the project phases, CPQ admins gain a thorough understanding of the setup and customization, which empowers them to manage, scale, and adapt the system as business needs evolve without always relying on external support.

These benefits highlight the importance of involving knowledgeable internal team members in significant project phases to ensure long-term success and operational efficiency.

**QUESTION 22**

An order has 5 order products that bill monthly. One of the order products requires 2 months of charges to appear on the next invoice without modifying invoicing for the other order products. What field will need to be used

to accomplish this task?(Q2,3R)

- A. Hold Billing
- B. Bill Through Date Override
- C. Override Next Billing Date
- D. Bill Now
- E. Target Date

**Correct Answer: B**

**Section:**

**Explanation:**

To ensure that one of the order products has 2 months of charges appear on the next invoice without affecting the invoicing of other products, the Bill Through Date Override field should be used. This field allows for the specification of a custom billing end date for a particular order product, enabling charges for multiple periods to be billed in one invoice while not altering the billing schedule of other products. This capability is crucial for flexible billing arrangements where specific billing requirements need to be met without globally changing the billing processes.

This approach is aligned with Salesforce Billing best practices, providing flexibility in handling individual order product billing needs while maintaining the integrity of the overall billing process.

### QUESTION 23

What are three Key Characteristics of an implementation partner leading a revenue cloudscoping session?

- A. Excellent Communication Skills both verbal and written
- B. Experience in A Selling Role With Quota Responsibilities
- C. Understanding Design pitfalls and Migration actions to course correct
- D. Being Effective at planning monitoring and reviewing
- E. Having Deep Knowledge of competitor products

**Correct Answer: A, C, D**

**Section:**

**Explanation:**

The key characteristics of an implementation partner leading a revenue cloud scoping session are:

A .Excellent Communication Skills both verbal and written:Effective communication is crucial in any project implementation. The implementation partner must be able to clearly articulate the project goals, requirements, and progress to all stakeholders. They must also be able to listen and understand the needs and concerns of the client and the project team.

C .Understanding Design pitfalls and Migration actions to course correct:An experienced implementation partner should have a deep understanding of the common pitfalls in design and migration and how to avoid or correct them. This includes understanding the technical and business implications of design decisions and being able to anticipate and mitigate risks.

D .Being Effective at planning, monitoring, and reviewing:The implementation partner should be skilled in project management, including planning, monitoring progress, and reviewing outcomes. They should be able to keep the project on track, ensure that all tasks are completed on time and within budget, and evaluate the success of the project.

While having experience in a selling role with quota responsibilities (B) and deep knowledge of competitor products (E) can be beneficial in some contexts, they are not typically considered key characteristics for leading a revenue cloud scoping session.Reference:<https://www.study4exam.com/salesforce/free-revenue-cloud-consultant-accredited-professional-questions>

[https://help.salesforce.com/s/articleView?id=000389713&language=en\\_US&type=1](https://help.salesforce.com/s/articleView?id=000389713&language=en_US&type=1)

### QUESTION 24

Our customer is headquartered in the US but has operations in Germany. The German operation has CPQ installed in their own EU instance of salesforce. Which service regions should be defined for the Europeans instance of CPQ in order to optimize calculation performance?

- A. North America
- B. japan
- C. Europe
- D. Australia



E. Server region has no performance impact

**Correct Answer: E**

**Section:**

#### QUESTION 25

Universal Containers is Preparing to go live with salesforce CPQ however sales management has stated that they would recurring revenue captured on opportunity line item object to reference within existing pipeline reports. Annual revenue is currently captured in the field ARR c on the SBQQ QuoteLine c Object. Which is the most efficient solution.

- A. Create ARR c on the opportunity Line item object, and create a price rule to copy the value from ARR c on SBQQ QuoteLine c on opportunity Product.
- B. Create ARR c on the opportunity Line item object, and create a flow to copy the value from ARR c on SBQQ QuoteLine C.
- C. Create ARR c on the opportunity Line item object, Matching the field configuration of ARR c on SBQQ QuoteLine C.
- D. Create a cross object formula field on the opportunity line item to reference ARR c data SBQQ QuoteLine C.

**Correct Answer: C**

**Section:**

#### QUESTION 26

A Salesforce CPQ implementation suffers from poor performance. The Revenue Cloud Consultant has implemented 90 active price rules Supporting complex pricing requirements. What tactics can a Revenue Cloud Consultant Consider to reduce the number of price rules to improve performance in this area? (Choose 2 options)

- A. Create a support case and request to increase the processing limits so that price rules perform better.
- B. Implement lookup price rules where applicable
- C. Implement Quote Calculator Plugin where Possible to replace price rules.
- D. Implement triggers and Apex that behave like price rules.
- E. Replace recursive price rule logic with nested bundles.



**Correct Answer: B, C**

**Section:**

**Explanation:**

A Salesforce CPQ implementation can suffer from poor performance due to a large number of active price rules supporting complex pricing requirements. To improve performance in this area, a Revenue Cloud Consultant can consider the following tactics:

Implement lookup price rules where applicable (Option B): Lookup price rules in Salesforce CPQ allow for the mapping of data points on a quote line to data in a custom object, finding a matching record with the same values, and retrieving an associated field value from the matched record<sup>1</sup>. This can help reduce the number of price rules needed, thereby improving performance<sup>1</sup>.

Implement Quote Calculator Plugin where possible to replace price rules (Option C): The Quote Calculator Plugin in Salesforce CPQ allows for the addition of extra functionality to the quote line editor with custom JavaScript code<sup>2</sup>. This can change how calculations are performed and manage page-level security such as field visibility<sup>2</sup>. By replacing some price rules with functionalities in the Quote Calculator Plugin, the number of price rules can be reduced, leading to improved performance<sup>2</sup>.

Salesforce CPQ Lookup Price Rules

Salesforce CPQ Quote Calculator Plugin

#### QUESTION 27

Universal containers recently migrated legacy contracts and subscriptions into salesforce in order to facilitate amendments and renewals in CPQ. However, sales users are getting the 'attempt to de-reference a null object' error when amending the legacy contract. What is the most likely cause for the error?

- A. Migrated contracts and subscriptions cannot be amended using salesforce CPQ
- B. Amendment of legacy contract and subscription data requires asset-based renewal method
- C. Required fields are missing or incorrectly populated on the legacy contract and subscription data
- D. Legacy subscription data are missing a lookup to a source quote line record

**Correct Answer: C**

**Section:**

**Explanation:**

The error 'attempt to de-reference a null object' typically occurs when there is an attempt to access a field or method on an object that has not been initialized or has been assigned a null value. In the context of Salesforce Revenue Cloud, when amending legacy contracts and subscriptions, this error can occur if required fields are missing or incorrectly populated on the legacy contract and subscription data. This could be due to incorrect data migration or manual data entry errors. It's important to ensure that all required fields are correctly populated when migrating legacy data to Salesforce CPQ.

Reference

Error:Can't renew the contract automatically because it ... - Salesforce

Guidelines for Amending Contracts - Salesforce

Legacy Data Upload for Salesforce CPQ

**QUESTION 28**

An invoice run with a target date of 6/1/20 has completed with no errors.an orderproductwith a next billing date of 6/1/20 did not generate an invoice line.which of the following ields might hold a value that would account for this?

- A. Billing type
- B. Next change date
- C. billing account
- D. Billing day of month
- E. Invoice run processing status

**Correct Answer: D**

**Section:**

**Explanation:**

In Salesforce Revenue Cloud, the "Billing Day of Month" field can affect whether an invoice line is generated for an order product1.The system evaluates several fields to calculate an order product's next billing date1.If the order product is billed in advance, Salesforce evaluates the order's billing day of month to choose the nearest date on or before the order product's start date1.If the order product is billed in arrears, Salesforce evaluates the order's billing day of month to choose the nearest date after the order product's start date1.Therefore, if the "Billing Day of Month" does not match with the next billing date of the order product, it might prevent the generation of an invoice line1.Reference

Understanding Next Billing Date - Salesforce

**QUESTION 29**

A Revenue Cloud customer has posted an invoice and now wants to add on more items from another order associated to that account. Without using invoice batches, how can this be accomplished?

- A. Credit the invoice, add the new order and run an invoice scheduler to pick all the orders up.
- B. use bill now on the new order and reparent the new invoice lines to the existing invoice
- C. Cancel and Rebill the invoice,add the new Order and run an invoice scheduler to pick all the order up.
- D. Use bill now on the new Order and consolidate the invoices

**Correct Answer: A**

**Section:**

**QUESTION 30**

Which three options might cause incorrect future invoicing for an amended order product?

- A. Not contracting the Amendment Order
- B. Having a subscription on the Contract be linked to an Order Product with one or more unpaid invoice lines
- C. Having a subscription on the Contract be linked to an Order Product with one or more invoice lines in draft
- D. Having a subscription on the Contract be linked to an unallocated Payment

E. Contracting from the Amended Opportunity

**Correct Answer: A, B, C**

**Section:**

**Explanation:**

Incorrect future invoicing for an amended order product might be caused by the following scenarios:

A .Not contracting the Amendment Order: If the amendment order is not contracted, the changes made in the amendment order will not be reflected in the future invoices. This is because the contract is the legal agreement that specifies the terms of the sale, including the products, quantities, and prices.If the amendment order is not contracted, the original terms of the sale remain in effect, which may result in incorrect future invoicing1.

B .Having a subscription on the Contract be linked to an Order Product with one or more unpaid invoice lines: If there are unpaid invoice lines linked to the order product, it may cause discrepancies in the future invoices.This is because the unpaid invoice lines may still be pending for payment, and if they are not resolved before the amendment order is contracted, the future invoices may not accurately reflect the changes made in the amendment order2.

C .Having a subscription on the Contract be linked to an Order Product with one or more invoice lines in draft: If there are invoice lines in draft status linked to the order product, it may cause inaccuracies in the future invoices. This is because the draft invoice lines have not yet been finalized and may still be subject to changes.If these changes are not finalized before the amendment order is contracted, the future invoices may not accurately reflect the changes made in the amendment order2.

### QUESTION 31

Which feature is needed to split Order Products into different Invoice runs?

- A. Invoice Group
- B. Invoice Batch
- C. Order by Group
- D. Order by Quote Line Group

**Correct Answer: A**

**Section:**

**Explanation:**

In Salesforce Revenue Cloud, the feature needed to split Order Products into different Invoice runs is the Invoice Group. The Invoice Group field on the order product is used to define more levels of grouping. After the invoice run groups order products by their billing account and payment terms, it then considers the order's invoice grouping.This process is useful for invoicing certain types of order products separately from your other order products1.

Grouping Order Products into Invoices - Salesforce

To split Order Products into different Invoice runs, the feature needed is 'Invoice Group.' Salesforce Billing allows for the customization of invoice groups, enabling the billing of order products that meet specific criteria separately. This functionality is particularly useful for separating invoices with different billing or payment terms and for consolidating several order products into a single invoice when needed. By defining an Invoice Group ID, users can control the invoicing process for order products more granularly, ensuring that invoicing aligns with business requirements.

### QUESTION 32

An Invoice Scheduler is set up with Target Date = January 15 and Bill Usage Charges = False. Which setting will generate invoice lines?

- A. Order Products with Next Billing Date equal to or earlier than January 15
- B. Usage Summaries with Next Billing Date equal to or earlier than January 15
- C. Order Products with Next Billing Date equal to or after January 15
- D. Order Products with Next Charge Date equal to or earlier January 15

**Correct Answer: A**

**Section:**

**Explanation:**

In Salesforce Revenue Cloud, an Invoice Scheduler is used to automate the generation of invoices for billable order products.The Invoice Scheduler uses an Invoice Run to evaluate when and if an Order Product gets invoiced1. When the Invoice Scheduler is set up with a Target Date (e.g., January 15) and Bill Usage Charges is set to False, it will generate invoice lines for Order Products with a Next Billing Date that is equal to or earlier than the Target Date1.This is because the Invoice Run is looking for eligible Order Products that match its criteria, which in this case would be Order Products with a Next Billing Date on or before the Target Date1.

It's important to note that the Invoice Scheduler kicks off Invoice Runs when it hits the start time that you specify.For example, if you have a monthly Invoice Scheduler that runs on the 15th of every month, it will generate





invoices for all Order Products with a Next Billing Date of January 15 or earlier<sup>1</sup>.

Use Invoice Scheduler to Generate Invoices - Salesforce

Using Invoice Schedulers to Automate Invoice Creation - Salesforce

### QUESTION 33

Universal Containers recently migrated legacy contracts and subscriptions into Salesforce in order to facilitate amendments and renewals in CPQ. However, sales users are getting the 'attempt to de-reference a null object' error when amending the legacy contract. What is the most likely cause for the error?

- A. migrated contracts and subscriptions cannot be amended using Salesforce CPQ
- B. Amendment of legacy contract and subscription data requires asset-based renewal
- C. Method required fields are missing or incorrectly populated on the legacy contract and subscription data
- D. legacy subscription data are missing a lookup to a source quote line record

**Correct Answer: C**

**Section:**

**Explanation:**

In Salesforce CPQ, when amending legacy contracts, encountering the 'attempt to de-reference a null object' error often points to issues with the underlying data structure of the migrated contracts and subscriptions. This error typically occurs when required fields are not present or are incorrectly populated, leading to null references in the system's code. It's essential to ensure that all necessary fields on legacy contracts and subscriptions are correctly filled in to support amendments in Salesforce CPQ. This might involve reviewing and correcting the data migration process to ensure that all required fields are accurately populated and that the data integrity is maintained.

### QUESTION 34

A Revenue Cloud user story states "Sales users should have the ability to create new quotes with established rate cards and account specific discounts because current customers are entitled to the pricing that was originally negotiated". In addition to loading data to accounts, contracts, quotes, what other object will need to absorb legacy data?

- A. Contracted Pricing
- B. order products
- C. entitlements
- D. Subscription

**Correct Answer: A**

**Section:**

**Explanation:**

Contracted Pricing is the object that stores the negotiated prices and discounts for each account and product combination. Contracted Pricing allows sales users to create new quotes with the same pricing terms that were agreed upon in previous contracts, without having to manually adjust the prices or discounts. Contracted Pricing also enables businesses to maintain pricing consistency and accuracy across different channels and systems. To use Contracted Pricing, legacy data from accounts, contracts, and quotes need to be loaded into the Contracted Pricing object, along with the relevant price book entries and product options.<sup>12</sup>Reference:

Contracted Pricing - Salesforce

Migrate Legacy Data to Contracted Pricing - Salesforce

### QUESTION 35

What does the 'safe harbor' slide at the beginning of every Salesforce presentation mean?

- A. roadmap capability will be released exactly as they are demonstrated
- B. new release capabilities will not have impact to existing implementations
- C. anything presented from Salesforce must be kept confidential mergers and acquisitions integrations are immediate
- D. You and or your customer are making scoping, design, planning, purchasing making decisions based on current and available capabilities

**Correct Answer: D**



**Section:****Explanation:**

The 'safe harbor' slide at the beginning of every Salesforce presentation is a legal disclaimer that informs the audience that the presentation may contain forward-looking statements about the company's future products, features, capabilities, performance, and financial results. These statements are based on the company's current expectations, assumptions, and projections, and are subject to risks, uncertainties, and changes that may cause the actual results to differ materially from the statements. Therefore, the audience should not rely on these statements as guarantees or promises of future performance or availability, and should make their own independent decisions based on the current and available capabilities of the company. The 'safe harbor' slide also directs the audience to the company's website, where they can find more information about the factors that may affect the forward-looking statements, as well as the company's most recent financial reports and filings.<sup>12</sup>

Salesforce - Safe Harbor

Salesforce Announces Record Fourth Quarter and Full Year Fiscal 2022 Results - Salesforce Earnings

**QUESTION 36**

Which is the correct sequence of evaluation events for a price rule, quote calculator plugin (QCP) and CPQ package pricing engine?

- A. internal initialization calculate formulas calculate quantities on Initialization Before Calculate On Calculate Price Waterfall Calculation After Calculate
- B. internal initialization calculate formulas calculate quantities Price Waterfall Calculation on Initialization Before Calculate On Calculate After Calculate
- C. internal initialization on Initialization Before Calculate calculate quantities On Calculate Price Waterfall Calculation After Calculate calculate formulas
- D. internal initialization on Initialization calculate formulas Before Calculate calculate quantities On Calculate Price Waterfall Calculation After Calculate

**Correct Answer: D**

**Section:****Explanation:**

The correct sequence of evaluation events for a price rule, quote calculator plugin (QCP), and CPQ package pricing engine is as follows:

Internal Initialization: This is the first step where the system prepares for the calculation process.

On Initialization: At this stage, any price rules that are set to trigger 'On Initialization' are run.

Calculate Formulas: The system evaluates formula fields.

Before Calculate: Any price rules that are set to trigger 'Before Calculate' are run.

Calculate Quantities: The system calculates quantities, for example, bundle components.

On Calculate: Any price rules that are set to trigger 'On Calculate' are run.

Price Waterfall Calculation: The system calculates out-of-the-box pricing tools such as block pricing, discount schedules, etc.

After Calculate: Any price rules that are set to trigger 'After Calculate' are run.<sup>1</sup>

This sequence ensures that all calculations and price rules are applied in the correct order, providing accurate pricing information.<sup>1</sup> Reference:

[https://help.salesforce.com/s/articleView?id=sf.cpq\\_price\\_rule\\_considerations.htm&language=en\\_US&type=5](https://help.salesforce.com/s/articleView?id=sf.cpq_price_rule_considerations.htm&language=en_US&type=5)

[https://help.salesforce.com/s/articleView?id=000388745&language=en\\_US&type=1](https://help.salesforce.com/s/articleView?id=000388745&language=en_US&type=1)

**QUESTION 37**

The order management plugin functionality allows the architect to override which of the following default package behavior in Salesforce CPQ?

- A. Set the activation date
- B. Set the billing day of the month
- C. Set the order end date
- D. Set the order start date

**Correct Answer: A**

**Section:****Explanation:**

In Salesforce CPQ, the Order Management plugin functionality provides flexibility in customizing the default package behavior, including the ability to set the activation date for orders. This feature allows for greater control over the order management process, enabling organizations to align the activation dates of their orders with their specific business requirements. By overriding the default behavior, businesses can ensure that the activation dates are set in a manner that is consistent with their operational workflows, contractual obligations, or customer agreements. This capability is part of Salesforce CPQ's broader set of features designed to provide customizable solutions to complex quoting and order management challenges.

### QUESTION 38

Universal Containers has recently implemented and released CPQ to users in their production environment. After an extensive testing Cycle in a sandboxed environment.

One of the automations implemented was to set every new quote created as 'primary' at the time of creation in order to save clicks. Users immediately began to report errors when trying to create quotes in the production environment for the first time. What could have caused this issue?

- A. The User did not execute post-installation scripts upon their first login to CPQ.
- B. The User did not have the proper access to the Opportunity Product object.
- C. The User did not have the proper access to the Quote Line object.
- D. The User did not have the proper access to the Quote Object.

**Correct Answer: D**

**Section:**

**Explanation:**

According to the Salesforce Revenue Cloud CPQ documentation, users need to have the Create, Read, Edit, and Delete permissions on the Quote object in order to create and manage quotes. If users do not have the proper access to the Quote object, they will encounter errors when trying to create quotes, even if the quotes are set as primary by default. This is because the primary quote field is a lookup field that references the Quote object, and users need to have access to the referenced object in order to populate the lookup field. Therefore, the most likely cause of the issue is that the users did not have the proper access to the Quote object in the production environment, and this was not detected in the sandbox environment because the users had different permissions or profiles there. Reference:

[https://help.salesforce.com/s/articleView?id=000316738&language=en\\_US&type=1](https://help.salesforce.com/s/articleView?id=000316738&language=en_US&type=1)

<https://help.salesforce.com/s/articleView?id=000381216&language=no&type=1>

In Salesforce CPQ, ensuring that users have the proper access to the Quote object is crucial for the smooth creation and management of quotes. The issue reported by users in the production environment, where errors occurred upon trying to create quotes for the first time, likely stemmed from insufficient permissions on the Quote object. In CPQ, setting a new quote as 'primary' at the time of creation is a common practice to streamline the quoting process. However, if users lack the necessary permissions on the Quote object, they would encounter errors when attempting to create or modify quotes. It's important to note that in Salesforce CPQ, orders must be created from a primary quote, and once an order is created from a primary quote, the quote cannot be edited. This indicates that the underlying issue is related to access permissions on the Quote object, rather than post-installation scripts, access to the Opportunity Product object, or access to the Quote Line object.

### QUESTION 39

How can a Revenue Cloud Consultant create a new payment Method for a credit card that will be saved for future Payments?

- A. Enter the credit card details into a new payment Method record Click the Tokenize button
- B. From the Payment credit cards related list, click the new credit card button.
- C. Enter the credit card details into a new payment method record. Salesforce users should use platform encryption for PCI Compliance.
- D. From the Account, Payment Method related list, then click the new Payment Method Credit Card button.

**Correct Answer: D**

**Section:**

**Explanation:**

To create a new payment method for a credit card that will be saved for future payments, the Revenue Cloud Consultant should follow these steps:

Navigate to the account record that needs the new payment method.

Find the Payment Methods related list, and then click New Payment Method Credit Card. This button opens a form that allows entering the credit card details, such as card number, expiration date, cardholder name, and billing address.

Optionally, select a payment gateway record to associate the payment method with a specific gateway. If no payment gateway is selected, the default gateway for the org is used.

Optionally, select the Autopay checkbox to make this payment method the default one for all transactions on this account.

Click Save. This action creates a new payment method record and also sends a request to the payment gateway to tokenize the credit card information. Tokenization is a process that replaces sensitive data with a unique identifier that can be used for payment processing without exposing the original data.

Once the payment gateway returns a token, the payment method record is updated with the token value in the Payment Gateway Token field. This token is used to process payments with this payment method in the future.

Create a Credit Card Payment Method

Payment Methods

Payments and Credits

#### QUESTION 40

A user story for a Revenue Cloud implementation states. As an Accounts Receivable Manager, I want to automatically generate invoices in draft status the same day of every month. What implementation option should a revenue cloud consultant pursue first?

- A. Set up an invoice scheduler
- B. Triggers and apex to check the bill now checkbox after the order status is changed to "Activated".
- C. Workflow rule to check the bill now checkbox after the order status is changed to "Activated".
- D. Set up a Payment Scheduler

**Correct Answer: A**

**Section:**

**Explanation:**

An invoice scheduler is a feature of Salesforce Revenue Cloud that allows you to automate the creation of invoices based on predefined criteria and schedules. An invoice scheduler uses an invoice run to evaluate whether and when an order product gets invoiced. You can set up an invoice scheduler to run daily, weekly, monthly, or once, and specify the target date and time, the invoice date, and the invoice batches to include. You can also choose to automatically post the generated invoices or review them in draft status before posting. An invoice scheduler is the best option to fulfill the user story, as it can generate invoices in draft status the same day of every month without requiring any manual intervention or custom code.<sup>12</sup>

Triggers and apex are not the best option, as they require writing and maintaining custom code, which can be complex and error-prone. They also do not provide the flexibility and control of an invoice scheduler, as they can only check the bill now checkbox after the order status is changed to "Activated", which may not match the desired invoicing schedule or criteria.<sup>3</sup>

Workflow rules are also not the best option, as they have similar limitations as triggers and apex. They can only check the bill now checkbox after the order status is changed to "Activated", and they cannot specify the invoice date, time, or batches. Workflow rules also have some restrictions and considerations, such as the number of actions per rule, the order of execution, and the impact on performance.<sup>4</sup>

Setting up a payment scheduler is not relevant to the user story, as it is a feature of Salesforce Revenue Cloud that allows you to automate the collection of payments from customers based on predefined criteria and schedules. A payment scheduler does not create invoices, but rather applies payments to existing invoices or payment allocations. [5]

1: Invoice Schedulers for Automating Invoice Creation - Salesforce

2: Invoice Scheduler | Salesforce Subscription Management | Salesforce Developers

3: Use Invoice Scheduler to Generate Invoices - Salesforce

4: Workflow Rules Considerations - Salesforce

[5]: Payment Schedulers for Automating Payment Collection - Salesforce



#### QUESTION 41

A Revenue Cloud customer has posted an invoice and now wants to add on more items from another order associated to that account. Without using invoice batches, how can this be accomplished?

- A. Credit the invoice, add the new order and run an invoice scheduler to pick all the orders up.
- B. Use bill now on the new order and re-parent the new invoice lines to the existing invoice
- C. Cancel and Rebill the invoice, add the new Order and run an invoice scheduler to pick all the order up.
- D. Use bill now on the new Order and consolidate the invoices.

**Correct Answer: C**

**Section:**

**Explanation:**

When a Revenue Cloud customer needs to add more items from another order to a posted invoice without using invoice batches, the recommended approach is to 'Cancel and Rebill' the invoice. This process involves rolling the invoice back to its state before the most recent billing cycle, allowing corrections or additions to be made to the invoice record. This action is applicable to both draft and posted invoices and is designed to address errors or changes needed on the invoice, such as adding new order items. This method ensures that all necessary adjustments are made while maintaining the integrity of the invoice's audit trail and data.

#### QUESTION 42

A Revenue Cloud Consultant surveys a customer's Sales Cloud implementation and discovers Multiple triggers, Workflow and flow Processes applied to the Opportunity object. What is the most appropriate recommendation to the customer before designing a Revenue Cloud Solution?

- A. Recommend using a single automation type for best Performance.

- B. Recommend to enable the CPQ Package Setting for "Large Quote Threshold" to an appropriate value in order to prevent future performance issues.
- C. Recommend continued use of multiple automation types where Revenue Cloud capabilities cannot address the business requirements
- D. Recommend the current automations are appropriate, optimize further if necessary.

**Correct Answer: A**

**Section:**

**Explanation:**

When encountering a Salesforce Sales Cloud implementation with multiple triggers, workflow, and flow processes applied to the Opportunity object, it is advisable to recommend consolidating these automations into a single type. This approach is recommended to optimize performance and maintainability, reducing complexity and potential conflicts between different automation types. Consolidating automations into one trigger, process builder, or flow ensures a more streamlined and efficient execution of business logic, contributing to better system performance and easier troubleshooting and maintenance.

#### QUESTION 43

What are three risks when using too many cross object formula fields in a Revenue Cloud Project?

- A. Formula field data is not always available during CPQ quote calculation
- B. Formula fields have unlimited access to object many relationships away which makes it vulnerable to data changes.
- C. They are computationally Expensive.
- D. They can easily exceed limits if not carefully designed and tested
- E. Formula Fields are editable, after the calculation completes the sales user or process automation can overwrite its value

**Correct Answer: A, C, D**

**Section:**

**Explanation:**

Cross object formula fields are fields that reference data from related objects using lookup or master-detail relationships. They can be useful to display information from parent or child objects without creating custom code or workflows. However, using too many cross object formula fields in a Revenue Cloud project can pose some risks, such as:

Formula field data is not always available during CPQ quote calculation. This means that the formula fields may not reflect the latest values from the related objects when the quote is being generated or updated. This can cause inaccurate pricing, discounts, or taxes. To avoid this, it is recommended to use CPQ fields or custom fields instead of cross object formula fields for quote calculation.<sup>12</sup>

They are computationally expensive. This means that the formula fields require more processing power and time to evaluate and display the data from the related objects. This can affect the performance and responsiveness of the application, especially if there are multiple formula fields on the same object or page layout. To avoid this, it is recommended to limit the number and complexity of cross object formula fields, and use filters or conditions to reduce the number of records that need to be evaluated.<sup>34</sup>

They can easily exceed limits if not carefully designed and tested. This means that the formula fields can cause errors or warnings if they exceed the maximum length, number, or level of relationships allowed by Salesforce. For example, a formula field can only reference up to 10 unique relationships and span up to five levels of relationships. If these limits are exceeded, the formula field will not save or display correctly. To avoid this, it is recommended to review the formula field limits and best practices, and test the formula fields in different scenarios and environments.

1: Lookup Price Rule query considerations with Salesforce CPQ [7]

2: Salesforce CPQ Quote Calculation Stages [8]

3: What Is a Cross-Object Formula? - Salesforce [9]

4: Tips for Reducing Formula Size and Complexity - Salesforce [10]

5: Formula Field Limits - Salesforce [11]

#### QUESTION 44

Which corrective action should an admin take after noticing an error on a posted invoice?

- A. Cancel and rebill, correct the order, create and post a new invoice.
- B. Change the status from Posted to draft on the invoice, correct the invoicing error and repost it
- C. Delete the invoice record, correct the order, create and Post a new invoice
- D. credit the invoice, correct the order, create and post a new invoice

**Correct Answer: A**

**Section:****Explanation:**

Upon noticing an error on a posted invoice, the recommended corrective action is to use the 'Cancel and Rebill' feature. This process allows an admin to roll back the invoice to its state before the most recent billing cycle, enabling the correction of errors on the invoice record. This functionality is applicable to both draft and posted invoices, providing a way to address issues such as missing invoice lines or incorrect billing details. After canceling and rebilling, the admin can correct the order as needed and proceed to create and post a new invoice, ensuring the accuracy of billing records.

**QUESTION 45**

A Revenue Cloud Consultant learns salesforce is deploying a new release during the course of the implementation. which two should be taken to make sure the implementation is tested against the new release before it deploys to production?

- A. Review status.salesforce.com to determine refresh cutoff for the new release
- B. The platform ensures that all sandboxes are upgraded at the same time so wait for the update.
- C. Determine whether your sandbox is on a preview or non preview instance.
- D. Submit a ticket to support when you want your sandbox Updated.

**Correct Answer: A, C**

**Section:****Explanation:**

In Salesforce Revenue Cloud, when a new release is being deployed, it's important to test the implementation against the new release before it deploys to production. This can be achieved by:

Reviewing status.salesforce.com to determine refresh cutoff for the new release: Salesforce provides information about the refresh cutoff for the new release on status.salesforce.com. This allows you to know when the new release will be available in the sandbox for testing.

Determining whether your sandbox is on a preview or non-preview instance: Salesforce refreshes preview sandboxes a month before each major release. Regular, non-preview sandboxes are refreshed toward the end of the release cycle. Knowing whether your sandbox is on a preview or non-preview instance can help you plan your testing schedule accordingly.

It's worth noting that while Salesforce ensures that all sandboxes are upgraded, the timing of the upgrade can vary depending on whether the sandbox is on a preview or non-preview instance. Submitting a ticket to support when you want your sandbox updated is not a standard practice for preparing for a new release.

Reference

Test New Releases in a Sandbox Unit | Salesforce Trailhead

Salesforce Introduces Revenue Cloud to Help Businesses Accelerate ...