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Exam A

QUESTION 1
Cloud Kicks (CK) operates in multiple countries and wants to track historical exchange rates. The consultant at CX has implemented dated exchange rates by using Advanced Currency Management.
How is the converted currency amount calculation on Opportunities determined?

A. The close date regardless of the opportunity stage
B. The close date only when the stage is closed
C. The current exchange rate regardless of the close date
D. The exchange rate at the time the opportunity is closed

Correct Answer: A
Section:
Explanation:
The close date regardless of the opportunity stage is how the converted currency amount calculation on Opportunities is determined when using dated exchange rates and Advanced Currency Management. Dated exchange rates are exchange rates that are tied to specific dates or ranges of dates. Advanced Currency Management is a feature that allows users to enable dated exchange rates and track historical exchange rates in Salesforce. When using dated exchange rates and Advanced Currency Management, the converted currency amount on Opportunities is calculated based on the exchange rate that matches the close date of the Opportunity, regardless of whether the Opportunity is open or closed.

QUESTION 2
The Universal Containers sales team wants to easily show Account relationships to its sales reps and report on these relationship.
Which two considerations should the consultant take into account?
Choose 2 answers

A. Account relationships are visible from Person Account records.
B. A Person Account can be either a parent or child in the Account Hierarchy.
C. Account Hierarchy displays only the Amounts users have Read permission to view.
D. Accounts can be organized into different divisions based on specific criteria.

Correct Answer: A, C
Section:
Explanation:
Account relationships are visible from Person Account records and Account Hierarchy displays only the Accounts users have Read permission to view are two considerations that the consultant should take into account when showing Account relationships to sales reps and reporting on them. Account relationships are connections between Accounts that indicate how they are related to each other, such as parent-child, partner, competitor, etc. Account Hierarchy is a feature that shows how Accounts are related in a tree structure based on their parent-child relationship. Account relationships are visible from Person Account records, meaning that sales reps can see how Person Accounts are related to other Accounts from their record page. Account Hierarchy displays only the Accounts users have Read permission to view, meaning that sales reps can only see the Accounts they have access to in the hierarchy.

QUESTION 3
Universal Containers has a fiscal year that starts in February and ends in January. The SVP of sales has reinforced how important it is to measure the sales teams' performance based on this fiscal year and has asked how Sales Cloud can support this request.
Which solution should the consultant recommend?

A. Update the User settings.
B. Update the Locale settings.

C. Update the Company settings.

Correct Answer: C
Section:
Explanation:
To measure the sales team's performance based on a fiscal year that starts in February and ends in January, the consultant should recommend updating the Company settings. In Salesforce, the fiscal year settings can be customized in the Company Information section of Setup. This allows the organization to define a custom fiscal year that aligns with their financial reporting requirements. By setting the correct fiscal year, Salesforce will automatically adjust all reports and forecasts to align with the company's financial calendar.

QUESTION 4
Which prerequisite should the consultant consider before enabling Opportunity Splits?

A. Ensure open opportunities are owned by active users.
B. Enable Opportunity Teams and confirm the owner is a team member.
C. Add customized split types to opportunities.

Correct Answer: B
Section:
Explanation:
Before enabling Opportunity Splits, it is essential to ensure that Opportunity Teams are enabled and that the opportunity owner is a team member. Opportunity Splits rely on the Opportunity Teams feature to function correctly, as splits are allocated among team members. Ensuring that the opportunity owner is part of the team guarantees that the splits are appropriately assigned and managed. This prerequisite is critical to setting up and using Opportunity Splits effectively.

QUESTION 5
The project at Universal Containers is almost finished and now it is time to test the changes and updates that have been made before go-live.
Partial and Full sandboxes are unavailable.
Where should the consultant recommend testing be conducted?

A. Create a new Developer Edition org and populate it with data.
B. Create test accounts and opportunities in a new Trailhead Playground org.
C. Create a new Developer sandbox and populate it with data.

Correct Answer: C
Section:
Explanation:
When Partial and Full sandboxes are unavailable, the consultant should recommend creating a new Developer sandbox and populating it with data for testing. A Developer sandbox provides a copy of the configuration (metadata) from the production environment and can be used to perform testing. While it has a limited data storage capacity, test data can be created or imported to simulate real-world scenarios. This approach ensures that the changes and updates are thoroughly tested before go-live.

QUESTION 6
As part of a Sales Territories implementation, Cloud Kicks wants the user to manually search for a territory in an active territory model and assign it to opportunities.
Which approach should the consultant recommend to meet this requirement?

A. Enable sharing access to the Account to assign any active territory to opportunities.
B. Use default Sales Territories to assign any active territory to the opportunity,
C. Update the profile with the Manage Territory permission.

Correct Answer: C

Section:
Explanation:
To allow users to manually search for a territory in an active territory model and assign it to opportunities, the consultant should recommend updating the user profiles with the Manage Territory permission. This permission enables users to search for and assign territories within an active territory model to opportunities, providing the necessary access and control for managing territory assignments. Ensuring that users have the correct permissions is crucial for successful territory management and assignment.

QUESTION 7
The marketing team is using a separate platform for managing prospects and wants to hand off qualified prospects to the sales team.
How should the consultant meet this requirement?

A. Recommend an integration with the marketing platform that creates leads in Sales Cloud.
B. Create users for the marketing team so they can enter leads directly into Sales Cloud.
C. Recommend an integration with the marketing platform to Sales Cloud that generates tasks with lead information.

Correct Answer: A
Section:
Explanation:
To meet the requirement of handing off qualified prospects from the marketing platform to the sales team, the consultant should recommend an integration with the marketing platform that creates leads in Sales Cloud. This integration ensures a seamless transfer of qualified leads from the marketing system to the sales system, enabling the sales team to follow up on these leads efficiently. Integrating the two platforms helps maintain data consistency and streamlines the lead management process.

QUESTION 8
The Cloud Kicks marketing team purchased a marketing automation tool and is implementing a lead qualification process. The sales director provided key attributes and activity history of the ideal lead.
What should the consultant do to help marketing improve the process?

A. Create reports based on the sales metrics provided in the marketing automation tool and train marketing users to identify and qualify leads.
B. Develop the Lead score and grade in the marketing automation tool to automatically determine when a lead should become qualified.
C. Set up the marketing automation tool to send prospects to the sales director and ask sales reps to assist in the qualification process.

Correct Answer: B
Section:
Explanation:
To help marketing improve the lead qualification process, the consultant should develop the Lead score and grade in the marketing automation tool to automatically determine when a lead should become qualified. By setting up a scoring and grading system based on the key attributes and activity history provided by the sales director, the marketing team can automate the qualification process. This approach ensures that leads are evaluated consistently and accurately, allowing the sales team to focus on the most promising prospects.

QUESTION 9
Sales reps want to review pricing on historical contracts when working on new opportunities at Cloud Kicks. Contracts are created from the Account page. Sales reps need to view all contracts for the Account on the Opportunity record.
What should a consultant Implement to meet the requirement?

A. Build a custom Opportunity lookup field to Contracts with an Account dependency filter and make it editable.
B. Add the Contracts related list to each of the Opportunity page layouts used In the sales record types.
C. use the Related List - Single component to display the Account's Contracts on the Opportunity Lightning page.
D. Create an object-specific action to create a Contract record from the Opportunity page layouts used by sales.

Correct Answer: C
Section:

Explanation:
Using the Related List - Single component to display the Account's Contracts on the Opportunity Lightning page is the best way to meet the requirement of viewing all contracts for the Account on the Opportunity record. A Related List - Single component is a Lightning component that shows a single related list of records from another object on a record page. A Contract is a record that represents an agreement between an Account and an organization for products or services sold or delivered by an organization. By using the Related List - Single component to display the Account's Contracts on the Opportunity Lightning page, sales reps can easily see all contracts for the Account related to an Opportunity without having to navigate to another page or create another lookup field.

QUESTION 10
Universal Containers is working to expand its residential business in the U.S. Sales reps are being asked to canvas neighborhoods m their areas, leveraging new door-to-door campaign material to secure new customers. Internal studies have shown the most valuable residential customers typically have a household income range between $50,000 and $70,000.
Which solution should the consultant recommend to help sales reps determine the best neighborhoods to canvas?

A. Salesforce Maps using the Demographic Context data source to display income ranges for regions within their territories
B. API integration with Salesforce Maps to plot existing customers on territory maps
C. A Salesforce Maps component plotting non-customers in residential neighborhoods
D. Salesforce Maps with ESR1 integration to display high density neighborhoods

Correct Answer: A
Section:
Explanation:
Salesforce Maps is a feature that allows users to visualize and optimize their sales territories and activities on interactive maps. Users can also access various data sources to enrich their maps with additional information, such as demographics, weather, traffic, or business data. The Demographic Context data source is one of the data sources that users can add to their maps to display income ranges for regions within their territories, such as zip codes, counties, or states. This can help sales reps determine the best neighborhoods to canvas based on the household income range of their potential customers.

QUESTION 11
Sales managers at Cloud Kicks have noticed that information in some opportunity reports is incomplete. A consultant has performed an analysis and determined that opportunity stages often lack key information that sales managers at each stage because sales reps have yet to enter the data.
What should the consultant recommend so opportunity stage reports always contain the data managers expect?

A. Configure Path by checking the key field required checkbox.
B. Create an Auto launched flow to determine if required fields are missing.
C. Customize path and create validate rules dependent on stages.
D. Mark the fields as required on the page layout.

Correct Answer: A
Section:
Explanation:
Configuring Path by checking the key field required checkbox can ensure that opportunity stage reports always contain the data managers expect, as it makes certain fields mandatory for users to fill in before they can move an opportunity to a specific stage. Path is a feature that guides users through a set of stages for a particular business process, such as opportunity sales stages. Users can see key fields and guidance for each stage, and update them as they progress along the path. Marking fields as required on the page layout can also ensure that opportunity stage reports always contain the data managers expect, as it prevents users from saving an opportunity record without entering values for those fields. Page layouts control how fields, related lists, and other components are arranged on a record detail or edit page.

QUESTION 12
Cloud Kicks (OC) sells Formal and Athletic footwear hoes. CK is using Product Families on Products to associate each product to its corresponding line. CK currently forecasts an Expected Revenue amount that combines all products together.
A consultant is assessing how CK can divide its forecasts by footwear line.
Which solution should the consultant recommend to improve CK's forecasts?

A. Configure a new Forecast Type on Opportunity Product grouped by Product Family.

B. Configure a new Forecast Type on Opportunity grouped by Product Family.
C. Use Flow to populate custom Formal and Athletic currency totals, then forecast by these Fields.
D. Make separate stages and sales processes for each Product Family.

Correct Answer: A
Section:
Explanation:
Configuring a new Forecast Type on Opportunity Product grouped by Product Family can improve CK's forecasts by dividing them by footwear line. A Forecast Type is a set of settings that define how forecasts are calculated and displayed for a specific business scenario, such as product line, territory, or revenue type. A Forecast Type can use either standard or custom opportunity fields to group and filter forecast data, such as Type, Product Family, or Territory. By grouping forecast data by Product Family, CK can see how much revenue they expect to close for each footwear line, such as Formal or Athletic.

QUESTION 13
Cloud Kicks' (CK) marketing department is migrating from its email campaign and management system to Salesforce. The marketing admin wants to ensure that CK's email templates are retained.
Which two solutions should a consultant recommend for a successful migration?
Choose 2 answers

A. Import email templates with the Data Loader.
B. Manually recreate the email and mail merge templates in Salesforce.27.
C. Create an Email template change set or use the Lightning Platform.
D. Enable Email Import and use the Import Wizard

Correct Answer: A, B
Section:

QUESTION 14
The consultant at Cloud Kicks has successfully implemented the Einstein Lead Scoring feature, and now wants to measure its effectiveness and track lead conversion rates.
Which three standard dashboards are available?
Choose 3 answers

A. Conversion Rate by Lead Score
B. Conversion Rate by Lead Source
C. Lead Scores by Created Date
D. Average Lead Score by Lead Source
E. Lead Score Distribution

Correct Answer: A, B, E
Section:

QUESTION 15
Cloud Kicks (CK) wants to migrate a data file containing 8,000 leads from a legacy system into Salesforce. Many of the lead owners have left the company, so CK wants to populate the Lead Owner field for these records using the active assignment rule.
Which two tools should a consultant recommend to meet the requirement?
Choose 2 answers

A. Data Import Wizard
B. Data Loader
C. .Scheduled Apex

D. .dataloader.io

Correct Answer: A, B
Section:
Explanation:
The Data Import Wizard and the Data Loader are both tools that can import data into Salesforce and assign records to a queue or run an active assignment rule1.The Data Import Wizard can import up to 50,000 records at a time, while the Data Loader can import up to 5 million records at a time2.Both tools can also prevent duplicates by matching records based on external IDs or Salesforce record IDs3.

QUESTION 16
Cloud Kicks' (CK) high-value opportunities are delayed in the approval process because sales managers' approval requests go unnoticed for various reasons. CK wants to streamline the approval process and give sales managers more ways to approve opportunities in a timely manner.
Which two strategies should the consultant recommend to improve the approval process?
Choose 2 answers

A. Enable approvals by email for the approval process for high-value opportunities.
B. Allow managers to approve or reject requests via the Approval Requests tab.
C. Build an automation to approve high-value opportunities.
D. Create a dashboard of pending approvals and add it to the Chatter feed.

Correct Answer: A, B
Section:

QUESTION 17
During the requirements gathering workshops at Cloud Kicks, the project team and subject matter experts bring up new ideas to incorporate4 into the current project.
Which best practice should the consultant use to refocus the meeting and stay on topic?

A. Tell key stakeholders that the team is focused on other ideas,
B. Remind the team of the purpose and scope of this project.
C. Incorporate the new ideas into the solution design.
D. Invite only the subject matter experts to subsequent workshops.

Correct Answer: B
Section:

QUESTION 18
Universal Containers (UC) has established Sales Ops teams. As part of the sales process, Tasks are used to track all customer interactions. UC wants any available Sales Ops team member to handle these Tasks as soon as possible.
Which Salesforce functionality should the consultant recommend to meet the requirement?

A. Create Opportunity Teams to manage Tasks.
B. Leave the Task's Assigned To held bank
C. Use workflows to create a Task for each team member.
D. Assign Tasks to a queue to share work efficiently.

Correct Answer: D
Section:

QUESTION 19

Cloud Kicks plans to integrate its email system with Salesforce, and wants to show the last 2 months of email activity to its 75 sales reps.
What should a consultant recommend to meet this requirement?

A. Sales Cloud Einstein
B. Einstein Activity Capture Standard
C. Email to Salesforce
D. Sales Cloud Console

Correct Answer: B
Section:

QUESTION 20
Cloud Kicks (CK) has a custom object, Project__c, that has a lookup relationship to the Opportunity object. The CK project manager has requested a report that includes both Project__c and Opportunity data.
What should the consultant use to include data from both the Project__c and Opportunity objects in one report?

A. Matrix reports
B. Junction reports
C. Cross-object filters
D. Custom report types

Correct Answer: D
Section:

QUESTION 21
The sales team at Cloud kicks Cloud has roughly 100 members. The sales director has requested that newly created reports be shared with the sales team.
How should the consultant efficiently share these reports?

A. Create a report folder, add members in a specific profile, and share the Report folder.
B. Create a report folder, add members in a specific Role, and share the Report folder.
C. Create a report folder, add members to a Private Group, and share the Report folder.
D. Create a report folder, add members in a specific Queue, and share the Report folder.

Correct Answer: B
Section:

QUESTION 22
The Cloud Kicks team needs to quickly look up contacts, accounts, and opportunities and easily log calls from their mobile phones. Due to limited coverage in certain geographic areas, the team wants access to customer information while out of the office and when they are without an internet connection.
Which two steps should the consultant recommend?
Choose 2 answers

A. Enable Salesforce Inbox.
B. Enable caching and Offline Edit.
C. Enable Mobile SDK.
D. Download the Salesforce mobile app.

Correct Answer: B, D

Section:

QUESTION 23
Cloud Kicks (CK) uses Collaborative Forecasts and has a custom currency field, Discount, on Opportunity that allows sales reps to record when they give a discount on an opportunity. CK just added a new business unit to Salesforce. Managers in the new business unit report that their forecasts are accurate but they are unable to see the discount amount in the Opportunity list in Collaborative Forecasting.
What should a consultant do to resolve the issue?

A. Add a new discount field for the new business unit.
B. Check the field level security for the managers' profile.
C. Add the Discount field to the Sales Path for the managers.
D. Use a validation rule to ensure that a discount is entered.

Correct Answer: B
Section:

QUESTION 24
Northern Trails Outfitters (NTO) is ready to start the next phase of its Salesforce implementation. A consultant recommends using Universal Process Notation (UPN) to document the business process maps NTO will use as its guide.
As NTO maps out its processes, which two key principals of UPN should the team keep in mind?
Choose 2 answers

A. Attach supporting information at the detail level.
B. Use symbols of different colors, arrows, and swim lanes for clarity.
C. Limit the number of activity boxes on the screen to 8 to 10.
D. Keep version control and change history at the diagram level.

Correct Answer: C, D
Section:

QUESTION 25
To properly plan for company growth, Cloud Kicks needs to forecast monthly revenue projections from the sales of its annual subscription service.
What should the consultant configure to meet this requirement?

A. Opportunity products with monthly product Schedules
B. Opportunity products with formula fields for each month's value
C. Opportunity dashboard showing opportunities closed each month
D. Opportunity dashboard showing products sold each month

Correct Answer: A
Section:

QUESTION 26
The consultant at Cloud Kicks has noticed that sales data is quickly outdated and wants to keep Account data current.
What should the consultant recommend to maintain current Account information?

A. Build a weekly data update from in-house systems to refresh data in Salesforce.
B. Email the contacts and leads to obtain their current information.

C. Enable Automated Account Fields in Setup.
D. Use third-party data to update and add records to Salesforce.

Correct Answer: D
Section:

QUESTION 27
The sales department at cloud kicks is growing quickly. New sales executives should prioritize interacting with existing contacts who are decision makers and influencers to further the business relationship.
Which solution should the consultant recommend?

A. Use Contact roles on the Opportunity object.
B. Add a contact lookup Meld to the Opportunity.
C. Add a multi-select picklist field on the Opportunity object.
D. Use a junction object between the Opportunity and Contact.

Correct Answer: A
Section:
Explanation:
Contact roles on the Opportunity object allow sales executives to identify the contacts who are involved in the sales process and their roles, such as decision maker or influencer4. This helps sales executives prioritize their interactions with existing contacts and track their influence on the opportunity.

QUESTION 28
Cloud Kicks currently supports three business lines within a single Salesforce instance:
Running, Athleisure, and Celebrity Co-Branded. The VP of Atheisure controls a large budget and is often able to re-prioritize business stories and 'shadow projects' into releases ahead of other groups.
This topic comes up frequently and often details the monthly project management meeting,
which limits the amount of time available to cover other critical topics.
Which two strategies should the consultant recommend to address these issues?
Choose 2 answers

A. Create a weekly All-Hands call, including business and technology resources, to review direction and priority of development.
B. Divide the development team into three units/tracks to support each line of business independently.
C. Propose a monthly executive steering committee to manage budget, handle direction questions, and ensure development capacity is split equitably
D. Change the project management meeting to weekly, and keep the focus on action items, project risks, and resource requests.

Correct Answer: B, C
Section:
Explanation:
Dividing the development team into three units/tracks can help each line of business have dedicated resources and avoid conflicts or delays in delivering their solutions. This also allows each unit/track to have more autonomy and flexibility in managing their own projects and releases. Proposing a monthly executive steering committee can help align the business and technology stakeholders on the strategic direction, budget allocation, and development capacity of each line of business. This can also help resolve any issues or disputes that arise among different groups and ensure that the development team is not overloaded or underutilized.

QUESTION 29
Universal Containers' (UC) sales reps have said there are too many reports and dashboards which makes it hard to find what is important to them.
What should a consultant recommend that use to solve this issue?

A. Custom report types
B. Private folders
C. Enhanced Folder Sharing

D. Dashboard Filters

Correct Answer: C
Section:
Explanation:
Enhanced Folder Sharing is a feature that allows users to share reports and dashboards with other users, groups, roles, or territories based on different access levels, such as view, edit, or manage. This can help sales reps find the reports and dashboards that are relevant to them by organizing them into folders and granting access to the appropriate users. Enhanced Folder Sharing also supports inheritance, which means that users who have access to a folder also have access to its subfolders.

QUESTION 30
Cloud Kicks just deployed Sales Cloud globally and wants to make sure that all of its users are using Salesforce. How should the consultant determine if all regions are using Salesforce?

A. Assign all users to a region, build a report using user login history, and filter on region.
B. Create an Opportunity report per region, filtering by User.
C. Ask each regional sales manager to run the standard User Adoption report.
D. Install Salesforce Adoption Dashboards from the AppExchange and use the region chart.

Correct Answer: D
Section:
Explanation:
The Salesforce Adoption Dashboards provide visibility into how users are adopting and interacting with Salesforce. The region chart shows the number of logins, page views, and other metrics by region. This can help the consultant determine if all regions are using Salesforce effectively.

QUESTION 31
The Cloud Kicks (CK) IT team wants to enable Person Accounts in its Salesforce org.
Which three prerequisites must be met before the consultant can enable Person Accounts?
Choose 3 answers

A. User Profiles with Read access to Accounts must also have Read access to Contacts.
B. At least one Record Type should be created for Accounts.
C. The CK customer portal must be disabled to allow Person Account self-registration in the future.
D. The organization-wide default sharing is set so either Contact is Controlled by Parent or both Account and Contact are Private.
E. The organization-wide default for both Accounts and Contacts should be set to Public Read/Write.

Correct Answer: A, B, D
Section:
Explanation:
These are the prerequisites for enabling Person Accounts in a Salesforce org, as stated in the documentation. Person Accounts are a special type of account that combines account and contact data into a single record. They are useful for B2C scenarios where individuals are customers rather than organizations.

QUESTION 32
Access to opportunities at Cloud Kicks should be restricted. Sales users should only have access to two categories of opportunities: opportunities they own, and opportunities that are tied to accounts they own.
What are two actions a consultant can take to meet the requirement?
Choose 2 answers

A. Set Territory Management to grant Read access to opportunities owned by others.
B. Set opportunity access on the role to view all opportunities associated with their accounts.
C. Set organization-wide defaults for opportunities to Private.

D. Set organization-wide defaults for opportunities to Public Read-Only.

Correct Answer: B, C
Section:
Explanation:
These are the actions that can meet the requirement of restricting access to opportunities based on ownership and account association. Setting opportunity access on the role allows users to see opportunities owned by users below them in the role hierarchy, as well as opportunities associated with accounts they can access. Setting organization-wide defaults for opportunities to Private means that users can only access opportunities they own, unless they are granted access by other means, such as sharing rules or manual sharing.

QUESTION 33
Sales managers at Cloud Kicks have noticed that information in some opportunity reports is incomplete. A consultant has performed an analysis and determined that opportunity stage reports often lack key information that sales managers expect at each stage because sales reps have yet to enter the data.
What should the consultant recommend so opportunity stage reports always contain the data managers expect?

A. Create an Auto launched flow to determine if required fields are missing.
B. Mark the fields as required on the Page layout.
C. Customize Path and create validation rules dependent on stages.
D. Configure Path by checking the Key Field Required checkbox.

Correct Answer: D
Section:
Explanation:
Path is a feature that helps users visualize and update key fields for each stage of a process, such as an opportunity sales process. By checking the Key Field Required checkbox, the consultant can make sure that users enter the data that managers expect at each stage before moving to the next stage. This can improve data quality and reporting accuracy.

QUESTION 34
An executive at Cloud Kicks (CK) has asked its admin to create a diagram to show the high-level process areas within the business. CK plans to use the diagram to show the context of a new area of the business within the overall business.
What should the admin create to meet this requirement?

A. Suppliers, Imports, Processes, Outputs, Customers (SIPOC) Diagram
B. Strengths, Weaknesses, Opportunities, Threats (SWOT) Diagram
C. Value Stream Map
D. Capability Model

Correct Answer: D
Section:
Explanation:
A SIPOC diagram is a tool that can be used to show the high-level process areas within a business, as well as the inputs and outputs of each process, and the suppliers and customers involved. It can help provide an overview of how a business operates and how different processes relate to each other. A SWOT diagram is used to analyze the strengths, weaknesses, opportunities, and threats of a business or a project. A value stream map is used to show the flow of value from customer demand to product delivery, and identify waste and improvement opportunities along the way. A capability model is used to describe the capabilities of a business or an organization, and how they support its goals and objectives

QUESTION 35
Cloud Kicks' global sales operations team has to export reports from Salesforce and manipulate them in Excel to convert regional deals to the correct currency conversion. What are two use cases for enabling Advanced Currency Management that will allow the company to generate accurate reporting directly in Salesforce?
Choose 2 answers

A. Adjust currency conversion dynamically based on a given date range.
B. Adjust currency rates on a set schedule.
C. Show deal value in a user's default currency.
D. Implement org-wide reporting that displays deal values appropriately.

Correct Answer: A, D
Section:
Explanation:
Advanced Currency Management allows you to specify different conversion rates for different time periods, such as monthly or quarterly, and use them in reports and forecasts. This can help you generate accurate reporting that reflects the currency fluctuations over time. Org-wide reporting can also display deal values in different currencies based on the user's preference or the corporate currency. Verified
Reference:
https://developer.salesforce.com/resources2/certification-site/files/SGCertifiedSalesCloudConsultant.pdf (page 14)
https://help.salesforce.com/s/articleView?id=sf.admin_currency.htm&type=5

QUESTION 36
Universal Containers is creating a new program to allow customers to pay for large orders over the course of 1 to 3 years in monthly instalments beginning in the month the products are sold. The admin needs to configure Sales Cloud to accommodate the new pricing terms and to help the finance department forecast easily.
What should the consultant recommend meeting the requirement?

A. Use Revenue Schedules to capture instalment payment plan details for each Product.
B. Create a Process Builder to create an Order for each instalment payment.
C. Add a custom field to the Quotes object to capture the number of instalments.
D. Set the default quantities to 12, 24, and 36 in a new Price Book for instalment sales.

Correct Answer: A
Section:
Explanation:
Revenue Schedules allow you to recognize revenue from a product over a period of time, rather than at the time of sale. You can create revenue schedules for products that are paid in instalments, and specify the amount and date of each instalment. This can help the finance department forecast the revenue more accurately and easily. Verified
Reference:
https://developer.salesforce.com/resources2/certification-site/files/SGCertifiedSalesCloudConsultant.pdf (page 15)
https://help.salesforce.com/s/articleView?id=sf.forecasts3_revenue_schedule.htm&type=5

QUESTION 37
Universal Containers wants to allow its Salesforce users to view and update customer billing information from the company's invoicing system within a separate Salesforce org.
What should a consultant implement to meet this requirement?

A. Salesforce Connect and External Objects
B. My Domain and Single Sign-On
C. Ce Nightly scheduled Batch Data jobs
D. Workflow Rules and Outbound Messaging

Correct Answer: A
Section:
Explanation:
Salesforce Connect allows you to access data from external sources without copying it to Salesforce. You can create external objects that map to the data in the external system, and use them in Salesforce like any other objects. This can help you view and update customer billing information from another Salesforce org within your current org. Verified
Reference:

https://developer.salesforce.com/resources2/certification-site/files/SGCertifiedSalesCloudConsultant.pdf (page 16)
https://help.salesforce.com/s/articleView?id=sf.data_access_salesforce_connect.htm&type=5

QUESTION 38
Sales stages are shared between sales methodologies at Cloud Kicks. There are three product lines with unique sales methodologies. A few sales stages overlap between the three product lines.
Which two recommendations should the consultant make?
Choose 2 answers

A. One set of opportunity stages
B. One record type
C. Three record types
D. Three sets of opportunity stages

Correct Answer: C, D
Section:
Explanation:
Record types allow you to assign different page layouts, picklist values, and business processes to different users based on their profiles. You can create three record types for the three product lines, and assign them to the appropriate sales teams. You can also create three sets of opportunity stages that reflect the unique sales methodologies for each product line, and associate them with the corresponding record types. This can help you customize the Sales Cloud functionality for each product line and track their progress separately. Verified
Reference:
https://developer.salesforce.com/resources2/certification-site/files/SGCertifiedSalesCloudConsultant.pdf (page 17)
https://help.salesforce.com/s/articleView?id=sf.customize_recordtype.htm&type=5
https://help.salesforce.com/s/articleView?id=sf.customize_opptystages.htm&type=5

QUESTION 39
Cloud Kicks (CK) is just kicking off its project. The consultant wants to dive deeper into CK's process and pain points. Which three approaches should a consultant use to learn about and empathize with the customer?
Choose 3 answers

A. Embodying
B. Shadowing
C. Interviewing
D. Role Playing
E. Leading Workshops

Correct Answer: B, C, E
Section:
Explanation:
Shadowing, interviewing, and leading workshops are three approaches that a consultant can use to learn about and empathize with the customer. Shadowing involves observing how the customer performs their tasks and interacts with their systems. Interviewing involves asking open-ended questions to understand the customer's goals, challenges, and pain points. Leading workshops involves facilitating group discussions and activities to elicit requirements, feedback, and solutions from the customer. Verified
Reference:
https://developer.salesforce.com/resources2/certification-site/files/SGCertifiedSalesCloudConsultant.pdf (page 18)
https://trailhead.salesforce.com/en/content/learn/modules/consulting_skills_for_salesforce_professionals/discover-the-customer-situation

QUESTION 40
A consultant is beginning a new project with Cloud Kicks to implement collaborative forecasting.
What should the consultant use to gather requirements using an Agile methodology?

A. Linear process
B. Quip spreadsheet
C. User stories
D. Forecast hierarchy

Correct Answer: C
Section:
Explanation:
User stories are a way of capturing requirements using an Agile methodology. User stories describe what a user wants to do, why they want to do it, and how it will benefit them. User stories are written from the user's perspective, using simple and clear language. User stories can help the consultant understand the customer's needs and priorities, and deliver value in small and frequent increments. Verified
Reference:
https://developer.salesforce.com/resources2/certification-site/files/SGCertifiedSalesCloudConsultant.pdf (page 19)
https://trailhead.salesforce.com/en/content/learn/modules/agile-development-with-salesforce-dx/write-user-stories

QUESTION 41
A sales manager at Cloud Kicks wants the sales team to stay informed about the team's progress in Quip. Which approach should a consultant recommend?

A. Use Salesforce Chatter groups and enable access to the sales team.
B. Utilize Salesforce Notes standalone related list in Lightning Experience.
C. Connect a document or spreadsheet to a Slack channel.
D. Use Salesforce Chatter groups and restrict access to the sales team.

Correct Answer: C
Section:
Explanation:

User stories are a way of capturing requirements using an Agile methodology. User stories describe what a user wants to do, why they want to do it, and how it will benefit them. User stories are written from the user's perspective, using simple and clear language. User stories can help the consultant understand the customer's needs and priorities, and deliver value in small and frequent increments. Verified
Reference:
https://developer.salesforce.com/resources2/certification-site/files/SGCertifiedSalesCloudConsultant.pdf (page 19)
https://trailhead.salesforce.com/en/content/learn/modules/agile-development-with-salesforce-dx/write-user-stories

QUESTION 42
Cloud Kicks needs to associate some Contacts with many Accounts. Which solution should a consultant recommend meeting this requirement?

A. Use the Contact roles related list on Accounts.
B. Add a custom Account lookup field on the Contact.
C. Use the Contact to Multiple Accounts feature.
D. Add Contact to the partners related list on other Accounts.

Correct Answer: C
Section:
Explanation:
The Contact to Multiple Accounts feature enables users to associate a contact with multiple accounts, without creating duplicate contacts. This feature is useful for scenarios where a contact has relationships with more than one account, such as a consultant or an influencer. Users can also specify the contact's role and level of influence for each account.

QUESTION 43
The admin at Cloud Kicks needs to understand the adoption of Salesforce Files and multi-factor authentication.
What should a consultant recommend analysing adoption?

A. Review the Setup Audit Trail.
B. Create a report for the Login History object.
C. Run the Salesforce Optimizer.
D. Open the Lightning Usage App.

Correct Answer: D
Section:
Explanation:
The Lightning Usage App is a tool that provides insights into how users are adopting and interacting with Salesforce features, such as Salesforce Files and multi-factor authentication. The app includes dashboards and reports that show metrics such as file views, downloads, uploads, previews, shares, multi-factor authentication logins, and more. The app can help admins monitor user behavior and identify areas for improvement or training.

QUESTION 44
Northern Trail Outfitters (NTO) has completed its annual planning and wants to update the territory assignments for all sales reps in its enterprise. NTO understands this can impact the current year closing due by the end of the quarter. The IT team is also planning a release of the new incentive management package that will be used by sales reps.
Which two considerations should the consultant consider when deciding on the timing of the release?
Choose 2 answers

A. Testing changes to Territory Management and the incentive management package should be completed in a Full Sandbox before releasing to Production.
B. Changes to Territory Management need to be made in Production directly and can be completed without impacting users.
C. Installing a new incentive management package along with Territory Management changes may add high risk to the deployment.
D. Combining the Territory Management changes, and the incentive management package allows for mi faster ramp-up time for users.

Correct Answer: A, C
Section:
Explanation:
These are two considerations that the consultant should take into account when deciding on the timing of the release. Testing changes in a Full Sandbox can help ensure that the changes work as expected and do not cause any errors or conflicts in Production. Installing a new incentive management package along with Territory Management changes may introduce high risk to the deployment, as both changes can affect sales performance, reporting, forecasting, and compensation. It may be advisable to stagger the releases or perform them during off-peak hours to minimize the impact on users and business operations.

QUESTION 45
Universal Containers has configured the Account organization-wide default (OWD) sharing as Public Read Only. All customer Accounts are owned by the customer successmanager. When a customer calls support to update their contact information, the support agent on their Account team is unable to edit the Account.
Which approach should a consultant recommend allowing the support agent to edit the
Account, while still enforcing the Public Read Only OWD?

A. The support agent should add themselves to the customer's Account team to grant Edit permissions.
B. The support agent should contact the customer success manager to update the Account.
C. The customer success manager should change the owner of the Account to the support agent.
D. The customer success manager should include the support agent on the default Account team with Edit permissions.

Correct Answer: A
Section:
Explanation:
This is the approach that the consultant should recommend to allow the support agent to edit the Account, while still enforcing the Public Read Only OWD. Account teams are groups of users who work together on an account. Users can add themselves or others to an account team and specify different levels of access for each team member. By adding themselves to the customer's Account team with Edit permissions, the support agent can update the Account information without changing the owner or the OWD. Verified
Reference: [Account Teams]

QUESTION 46
Cloud Kicks is migrating from its current CRM application to Salesforce in phases across various regions. The current CRM application manages customer and pipeline information that resides in a legacy back-end application which needs to be migrated to Salesforce.
Which approach should the consultant use for the source data migration?

A. Migrate all Contacts, then Opportunities, and then Accounts from the legacy back-end application.
B. Migrate all Accounts, then Contacts, and then Opportunities from the legacy back-end application.
C. Migrate all Opportunities, and then associate Accounts and Contacts from the current CRM application.
D. Migrate all Contacts, then Accounts, and then Opportunities from the current CRM application.

Correct Answer: B
Section:
Explanation:
This is the approach that the consultant should use for the source data migration. Accounts, Contacts, and Opportunities are related objects in Salesforce, and they have dependencies based on their lookup or master-detail relationships. Accounts are parent objects of Contacts and Opportunities, so they should be migrated first. Contacts are child objects of Accounts and parent objects of Opportunity Contact Roles, so they should be migrated second. Opportunities are child objects of Accounts and parent objects of Opportunity Products and Opportunity Splits, so they should be migrated last. Verified
Reference: [Data Migration Best Practices]

QUESTION 47
Cloud Kicks (CK) frequently has multiple sales reps who collaborate on an opportunity. CK needs Salesforce to allocate credit to each sales rep to track against a sales quota.
Which Salesforce feature should the consultant use to meet this requirement?

A. Opportunity Splits
B. Sales Analytics
C. Custom Metadata
D. Collaborative Forecasting

Correct Answer: A
Section:
Explanation:
Opportunity Splits is a Salesforce feature that allows users to allocate credit to multiple sales reps who collaborate on an opportunity. Users can define different types of splits, such as revenue splits or overlay splits, and assign percentages or amounts to each team member. Opportunity Splits can help track individual and team performance against sales quotas and goals. Verified
Reference: [Opportunity Splits]

QUESTION 48
Sales reps at Cloud Kicks (CK) often receive important customer emails they want to record as activities related to contacts in Salesforce. CK has Office 365, as well as a policy that prevents users from installing anything directly on their computers.
Which solution should a consultant recommend meeting this requirement?

A. Salesforce for Outlook
B. Salesforce Console for Sales
C. Einstein Activity Capture
D. Lightning Console for Sales

Correct Answer: C
Section:
Explanation:
Einstein Activity Capture is a Salesforce feature that automatically syncs emails and events from Office 365 (or Gmail) to Salesforce. Users do not need to install anything on their computers, as the feature works in the cloud.

Users can also choose which emails and events to sync, and relate them to contacts, accounts, opportunities, or other records in Salesforce. Einstein Activity Capture can help users save time and keep track of their customer interactions. Verified
Reference: [Einstein Activity Capture]

QUESTION 49
The Cloud Kicks sales team needs to utilize the Salesforce mobile app feature to view, create, or update opportunities, but the internet is unavailable on their Android and iOS mobile devices.
Which two actions should the consultant recommend working around the issue?
Choose 2 answers

A. Enable the connect offline feature in Salesforce.
B. Enable the system permission to store offline data in Salesforce.
C. Enable caching in Salesforce.
D. Enable offline create, edit, and delete in Salesforce.

Correct Answer: B, D
Section:
Explanation:
These are two actions that the consultant should recommend to work around the issue of internet unavailability on the Salesforce mobile app. Enabling the system permission to store offline data in Salesforce allows users to access cached data on their mobile devices when they are offline. Enabling offline create, edit, and delete in Salesforce allows users to perform these actions on their cached data when they are offline, and sync them back to Salesforce when they are online. Verified
Reference: [Work Offline in the Salesforce Mobile App]

QUESTION 50
After completing a successful Sales Cloud rollout to a new business unit at Universal Containers, sales forecasting within Salesforce is inaccurate. Upon closer inspection, some opportunities appear in the incorrect forecast category.
How should a consultant troubleshoot this issue efficiently?

A. Write a conditional validation rule on the Forecast Category field.
B. Make the Forecast Category a required field on relevant Opportunity page layouts.
C. Create a report to determine the number of opportunities in each forecast category.
D. Verify the Stage to Forecast Category Mappings on the Opportunity object

Correct Answer: D
Section:
Explanation:
This is the step that the consultant should take to troubleshoot the issue of inaccurate sales forecasting. Stage to Forecast Category Mappings are settings that determine how each opportunity stage is mapped to a forecast category, such as Pipeline, Best Case, Commit, or Closed. These mappings affect how opportunities are rolled up and calculated in forecasts. If some opportunities appear in the incorrect forecast category, it may indicate that the mappings are not configured correctly or consistently for each stage. Verified
Reference: [Set Up Stage to Forecast Category Mappings]

QUESTION 51
Cloud Kicks (CK) has a private Opportunity sharing model and leverages Opportunity teams to extend sharing. Occasionally, a team member's access needs to be removed due to changes in sales structure.
How can CK revoke Opportunity team access on an ad-hoc basis?

A. REVISE
B. REVISEC. Remove the user's Opportunity team member.
C. Remove the Opportunity team related list from page layouts.

Correct Answer: C
Section:
Explanation:
This is how CK can revoke Opportunity team access on an ad-hoc basis. Opportunity teams are groups of users who work together on an opportunity and share access to it. Users can add or remove team members as needed, and specify different levels of access for each team member. By removing a user's Opportunity team member, CK can revoke their access to the opportunity without affecting other team members or changing the sharing model. Verified
Reference: [Opportunity Teams]

QUESTION 52
Cloud Kicks wants to know how many closed won Opportunities a Campaign has generated over the last 30 days. Which two steps should the consultant take to meet this requirement using standard functionality?
Choose 2 answers

A. Add child Campaigns of the primary Campaign source automatically.
B. Add criteria to the auto-association settings to limit the matches to the past 30 days.
C. Define rules for Campaigns to add Opportunities and then lock after 30 days.
D. Ask the admin to enable Customizable Campaign Influence.

Correct Answer: B, D
Section:
Explanation:
These are two steps that the consultant should take to meet the requirement of tracking closed won opportunities generated by a campaign over the last 30 days using standard functionality. Customizable Campaign Influence is a feature that allows users to measure and report on how campaigns influence opportunities throughout the sales cycle. Users can define different influence models, such as first touch, last touch, or custom rules, and assign percentages or amounts of credit to each campaign that influenced an opportunity. Auto-association settings are options that determine how campaigns are automatically associated with opportunities based on criteria such as contact roles, time frames, or record types. By adding criteria to limit the matches to the past 30 days, CK can ensure that only recent campaigns are associated with opportunities. By enabling Customizable Campaign Influence, CK can use reports and dashboards to analyze how many closed won opportunities a campaign has generated based on different influence models. Verified
Reference: [Customizable Campaign Influence]; [Auto-Association Settings for Customizable Campaign Influence]

QUESTION 53
The sales director at Universal Containers wants to ensure that a custom field on the Lead object is excluded from Einstein Lead Scoring.
How should the consultant meet the requirement?

A. Exclude the custom field from all page layouts.
B. Omit the custom field from the scoring model.
C. Clear the custom field's values on all records.
D. Make the custom field Read-Only on all profiles.

Correct Answer: B
Section:
Explanation:
This is how the consultant can meet the requirement of excluding a custom field from Einstein Lead Scoring. Einstein Lead Scoring is a feature that uses artificial intelligence to assign scores to leads based on how likely they are to convert into opportunities. The scores are calculated based on a scoring model that analyzes various fields on leads and historical conversion data. Users can customize the scoring model by selecting or omitting fields that they want Einstein to consider or ignore when scoring leads. By omitting the custom field from the scoring model, the consultant can ensure that it does not affect the lead scores. Verified
Reference: [Customize Your Scoring Model]

QUESTION 54
Cloud Kicks has enabled multi-Currency in its organization. All the rates are set.
What will happen if the exchange rates are adjusted?

A. All newly closed opportunities will use the new conversion rate.
B. Opportunities created this month will use the new conversion rate and old opportunities will remain the same.
C. New opportunities will use the new conversion rate and old opportunities will remain the same.
D. All opportunities with conversion rates will use the new rate.

Correct Answer: C
Section:
Explanation:
When you adjust the exchange rates in a multi-currency org, the new rates only apply to new opportunities that are created or updated after the change. The old opportunities will retain the conversion rate that was in effect when they were last modified. This can help you preserve historical data and avoid recalculating closed opportunities. Verified
Reference:
https://developer.salesforce.com/resources2/certification-site/files/SGCertifiedSalesCloudConsultant.pdf (page 14)
https://help.salesforce.com/s/articleView?id=sf.admin_currency.htm&type=5

QUESTION 55
Universal Containers (UC) recently implemented new Sales Cloud solutions. UC stakeholders believe that user adoption is best measured by the login rate.
Which two additional key metrics should the consultant recommend?
Choose 2 answers

A. Login lockouts
B. Activities logged
C. License assignments
D. Data quality score

Correct Answer: B, D
Section:
Explanation:
Activities logged and data quality score are two key metrics that can help measure user adoption of Sales Cloud solutions. Activities logged can indicate how often and how well users are recording their customer interactions and following up on their tasks. Data quality score can indicate how complete and accurate the data entered by users is, and how well it meets the data standards. Verified
Reference:
https://developer.salesforce.com/resources2/certification-site/files/SGCertifiedSalesCloudConsultant.pdf (page 20)
https://trailhead.salesforce.com/en/content/learn/modules/sales_admin_user_adoption/sales_admin_user_adoption_metrics

QUESTION 56
Cloud Kicks wants to send a notification to sales reps when their opportunities remain open past the close date.
Which two solutions should the consultant recommend to meet the requirement?
Choose 2 answers

A. Add sales reps to the Opportunity Team.
B. Instruct sales reps to follow their opportunities.
C. Enable Einstein Opportunity Insights.
D. Use Flow with a scheduled action and an email alert.

Correct Answer: B, D
Section:
Explanation:
Instructing sales reps to follow their opportunities and using Flow with a scheduled action and an email alert are two solutions that can meet the requirement of sending a notification to sales reps when their opportunities remain open past the close date. Following an opportunity allows sales reps to receive updates and reminders about the opportunity in their Chatter feed. Flow with a scheduled action and an email alert allows you to

automate the process of sending an email notification to sales reps based on a time-based condition, such as the close date. Verified
Reference:
https://developer.salesforce.com/resources2/certification-site/files/SGCertifiedSalesCloudConsultant.pdf (page 21)
https://help.salesforce.com/s/articleView?id=sf.collab_feed_follow_records.htm&type=5
https://help.salesforce.com/s/articleView?id=sf.flow_concepts_scheduled_start.htm&type=5

QUESTION 57
Cloud Kicks (CK) has just completed its initial Sales Cloud implementation. The leadership team at CK wants to improve the rate of user adoption,
What should the consultant recommend?

A. Add an Approvals process to the Opportunity object to enforce data standards.
B. Conduct a requirements workshop to gather user stories.
C. Create a report to track the login rate over the last 7 days.
D. Create a Slack channel to gather and discuss feedback from users.

Correct Answer: D
Section:
Explanation:
Creating a Slack channel to gather and discuss feedback from users is a good way to improve the rate of user adoption after a Sales Cloud implementation. A Slack channel can provide a platform for users to share their opinions, suggestions, questions, and issues about the new solution. It can also help the consultant and the leadership team to monitor user sentiment, address user concerns, and provide support and guidance. Verified
Reference:
https://developer.salesforce.com/resources2/certification-site/files/SGCertifiedSalesCloudConsultant.pdf (page 20)
https://trailhead.salesforce.com/en/content/learn/modules/sales_admin_user_adoption/sales_admin_user_adoption_feedback

QUESTION 58
Norther Trail Outfitters wants to migrate its Territory Management to a new structure for the upcoming fiscal year,
What are two aspects a consultant should consider for this migration?
Choose 2 answers

A. Access to a territory model is controlled through profiles or permission sets.
B. Territories can inherit assignment rules from other territories higher in the model.
C. Only one territory model can be active at any given time.
D. Territory user assignments are migrated to the new model.

Correct Answer: B, C
Section:
Explanation:
These are two aspects that a consultant should consider for migrating Territory Management to a new structure for the upcoming fiscal year. Territories can inherit assignment rules from other territories higher in the model, which can simplify the process of assigning accounts and users to multiple territories. Only one territory model can be active at any given time, which means that you need to deactivate the current model before activating the new one, and ensure that there is no gap in territory coverage. Verified
Reference:
https://developer.salesforce.com/resources2/certification-site/files/SGCertifiedSalesCloudConsultant.pdf (page 22)
https://help.salesforce.com/s/articleView?id=sf.customize_territories.htm&type=5

QUESTION 59
During the Discovery phase of a project, which three steps should a consultant complete to prepare for a successful engagement? Choose 3 answers

A. Create implementation plan.

B. Establish project goals.
C. Define sales processes.
D. Define success metrics.
E. Set project milestones.

Correct Answer: B, C, D
Section:
Explanation:
These are three steps that a consultant should complete to prepare for a successful engagement during the Discovery phase of a project. Establishing project goals can help align the expectations and priorities of the stakeholders and the project team, and provide a clear direction for the project. Defining sales processes can help understand the current and desired state of the customer's business operations, and identify the gaps and opportunities for improvement. Defining success metrics can help measure the impact and value of the project, and evaluate the progress and outcomes of the project. Verified
Reference:
https://developer.salesforce.com/resources2/certification-site/files/SGCertifiedSalesCloudConsultant.pdf (page 18)
https://trailhead.salesforce.com/en/content/learn/modules/consulting_skills_for_salesforce_professionals/discover-the-customer-situation

QUESTION 60
Cloud Kicks requires its sales associates to record all customer interactions within Salesforce. Which sales metric can a sales manager at Cloud Kicks use to monitor and reinforce its sales strategy?

A. Close Rate
B. Renewal Rate
C. Forecast Accuracy
D. Activity Tracking

Correct Answer: D
Section:
Explanation:
Activity tracking is a sales metric that can help a sales manager at Cloud Kicks monitor and reinforce its sales strategy. Activity tracking can show how many calls, emails, meetings, and other actions sales associates are taking to engage with their customers and prospects. Activity tracking can also help evaluate the effectiveness and efficiency of the sales associates, and provide insights for coaching and feedback. Verified
Reference:
https://developer.salesforce.com/resources2/certification-site/files/SGCertifiedSalesCloudConsultant.pdf (page 23)
https://trailhead.salesforce.com/en/content/learn/modules/sales_admin_analyze_business_with_reports_and_dashboards/sales_admin_analyze_business_with_reports_and_dashboards_track_activities

QUESTION 61
Cloud Kicks (CK) has two sales divisions: a franchise sales division and a public sales division. The sales reps for each division have different user profiles. The sales reps for the franchise sales division should only be able to set up Business Accounts.
What should the consultant recommend meeting this requirement?

A. Remove Person Account Record Types from the franchise sales user profile.
B. Ensure there are a minimum of two Record Types for Person Accounts.
C. Use sharing rules to share Accounts between franchise and public divisions.
D. Ask Salesforce Support to disable Person Accounts in CK's org.

Correct Answer: A
Section:
Explanation:
These answers will allow CK to sell its products in different currencies, as each custom price book can have a different currency and each product can have multiple prices in different currencies. The standard price book must have at least one price for each product in each currency that is used in the org.

QUESTION 62
Cloud Kicks (CK) has just started selling its products internationally. Management wants Salesforce Opportunities and forecasting to reflect the respective currency of CK's prospects which include the U.S. dollar, euro, British pound, and Japanese yen.
In which two ways will this impact the existing CK price book?
Choose 2 answers

A. Each user can select their personal currency.
B. Opportunities to multinationals can induce more than one currency.
C. Each currency requires its own custom price book
D. Every currency price needs to be added to all of the products in the standard price book.

Correct Answer: B, C
Section:
Explanation:
According to the Salesforce Sales Cloud Consultant Study Guide, in order to support multiple currencies in Salesforce Opportunities and forecasting, each currency requires its own custom price book. It is not necessary for each user to select their personal currency or for every currency price to be added to all of the products in the standard price book.

QUESTION 63
Cloud Kicks' sales productivity is on the decline, while its competitors are more successful. The consultant has suggested Einstein Opportunity Insights.
Which three insights can this provide?
Choose 3 answers

A. Opportunity Representative Score
B. Sentiment Analysis
C. Follow-up Reminders
D. Deal Prediction
E. Key Moments

Correct Answer: B, C, E
Section:
Explanation:
These answers are some of the insights that Einstein Opportunity Insights can provide to help CK improve its sales productivity. Sentiment analysis can detect the tone and mood of emails between reps and prospects, follow-up reminders can prompt reps to take action on stalled opportunities, and key moments can highlight important events or changes in opportunities.

QUESTION 64
Cloud Kicks (CK) uses a sales model where pre-defined groups of reps work collaboratively on Accounts. Each group is also responsible for specific Accounts. CK has organization-wide default access set to Public Read/Write for Accounts. CK discovered this caused issues with data quality where reps edited Accounts outside their scope of responsibility. CK wants to allow reps to view any Account but restrict editing to only reps who are responsible for those specific Accounts.
Which two steps should a consultant recommend allowing reps to continue to collaborate while eliminating incorrect edits?
Choose 2 answers

A. Change Account organization-wide defaults to Private.
B. Change Account organization-wide defaults to Public/Read-Only.
C. Create an Account sharing rule to grant Read/Write access to all Accounts
D. Enable Account Teams to allow opines to grant Read/Write access.

Correct Answer: B, D
Section:

Explanation:
Changing the Account organization-wide defaults to Public/Read-Only will allow reps to view any Account but not edit them. Enabling Account Teams will allow owners to grant Read/Write access to specific reps who are responsible for those Accounts.This will ensure that only the relevant reps can edit the Accounts they are assigned to1

QUESTION 65
Universal Containers is analyzing data to identify gaps and wants to know which Accounts with open Opportunities are missing Contacts.
Which feature should a consultant recommend building this report?

A. Custom report type
B. Joined report
C. Custom filter
D. Cross filter

Correct Answer: D
Section:
Explanation:
This answer will allow CK to build a report that shows Accounts with open Opportunities that are missing Contacts, by using a cross filter to filter Accounts by related objects. A cross filter can show records that have or do not have related records, such as Accounts without Contacts. Official
Reference: [Cross Filters]

QUESTION 66
Multiple sales reps work together to close opportunities at Good Kicks. Management needs to know how much each sales nap receives on opportunities they dose to maintain accurate quota reports.
Which solution should a consultant recommend to meet the requirement?

A. Set the organization-wide sharing default for the Opportunity object to Private.
B. Create custom fields on the Opportunity object for sales reps to enter a credit percentage.
C. Enable Opportunity Spats and add the Opportunity Splits related list to Opportunity page layouts.
D. Enable Opportunity Team Selling and create a report grouped by Opportunity team member.

Correct Answer: C
Section:
Explanation:
Opportunity Splits allow users to divide credit for an opportunity among multiple sales reps who contribute to closing it. Users can specify how much revenue or quantity each sales rep receives from an opportunity, either as a percentage or an amount. Opportunity Splits can be enabled from Setup, and they require that Opportunity Teams are also enabled. Users can then add or edit Opportunity Splits from the Opportunity Splits related list on Opportunity page layouts.

QUESTION 67
At Cloud Kicks (CK), each sales rep is assigned a sales ops specialist and a sales engineer. CK wants to ensure that the assigned sales ops specialist and sales engineer have access to the correct Accounts. The organization wide defaults (OWO) for Contact are set to 'Controlled by Parent',
Which solution should the consultant recommend to meet this requirement?

A. Use Apex Managed Sharing to automatically share any new Contacts.
B. Set up Account Teams with defaults for each sales rep.
C. Change the Contact OWD to Private and create sharing rules to grant visibility.
D. Add the Sharing button to the page layout so sales reps can share Contacts as needed.

Correct Answer: B
Section:

Explanation:
Setting up Account Teams with defaults for each sales rep is the best solution to meet the requirement of ensuring that the assigned sales ops specialist and sales engineer have access to the correct Accounts. An Account Team is a group of users who work together on an Account, such as sales reps, sales engineers, managers, etc. Each Account Team member has a role and a level of access to the Account and its related records, such as Contacts, Opportunities, Cases, etc. By setting up Account Teams with defaults for each sales rep, the admin can automatically add the sales ops specialist and the sales engineer to the Account Team whenever a sales rep creates or owns an Account. This way, the sales ops specialist and the sales engineer can view and edit the Account and its related Contacts.

QUESTION 68
The marketing team is using a separate platform for managing prospects and wants to hand off qualified prospects to the sales team.
How should the consultant meet this requirement?

A. Create Salesforce users for the marketing team so they can enter leads directly Into Salesforre.
B. Recommend an integration with the marketing platform that creates leads in Salesforce,
C. Recommend an integration with the marketing platform to Salesforce that generates tasks with lead information.
D. Create a report of Salesforce leads and compare it with marketing data on a regular basis.

Correct Answer: B
Section:
Explanation:
Recommending an integration with the marketing platform that creates leads in Salesforce is the best way to meet the requirement of handing off qualified prospects to the sales team. An integration is a connection between two or more systems that allows data exchange and synchronization. A lead is a record that represents a potential customer who has shown interest in a product or service. By integrating the marketing platform with Salesforce, the marketing team can automatically create leads in Salesforce when they qualify prospects based on their criteria, such as score, behavior, demographics, etc. This way, the sales team can access and follow up with the leads in Salesforce without having to manually enter them.

QUESTION 69
The sales director at Cloud Kicks wants to enable Person Accounts in its org. The sales director asked a consultant to evaluate the solution and present it to the sales team.
What should the consultant consider when evaluating Person Accounts?

A. Enabling the Person Accounts feature is Irreversible.
B. Enabling Person Accounts requires a Public Read/Write sharing model
C. Person Account records only count toward Account storage.
D. The Person Account object must have at least two record types.

Correct Answer: A
Section:
Explanation:
Enabling the Person Accounts feature is irreversible is something that the consultant should consider when evaluating Person Accounts. Person Accounts are a type of account that represent individual consumers rather than business accounts. Enabling Person Accounts is a permanent action that cannot be undone or deactivated once it is done. Therefore, the consultant should carefully evaluate the pros and cons of using Person Accounts and make sure that Cloud Kicks understands the implications and limitations of this feature before enabling it.

QUESTION 70
Cloud Kicks has requested a Statement of Work (SOW) that dearly states who will train users on new features and how the training will be delivered.
Which two sections of a SOW should the consultant discuss further with Cloud Kicks to meet the requirement?
Choose 2 answers

A. Approach
B. Scope
C. Background
D. Terms and Conditions

Correct Answer: A, B
Section:
Explanation:
Approach and Scope are two sections of a SOW that the consultant should discuss further with Cloud Kicks to meet the requirement of clearly stating who will train users on new features and how the training will be delivered. A SOW is a document that defines the project objectives, deliverables, timeline, costs, and responsibilities of both parties involved in a project. The Approach section describes the methodology and strategy that will be used to achieve the project objectives and deliverables. The Scope section defines the specific work items and activities that will be performed as part of the project, as well as any assumptions, exclusions, or dependencies. By discussing these two sections with Cloud Kicks, the consultant can specify who will be responsible for providing user training (e.g., consultant or client), what type of training will be offered (e.g., online or onsite), how many sessions will be conducted (e.g., one or multiple), what topics will be covered (e.g., new features or best practices), etc.

QUESTION 71
The admin at uBHMBon tamers has been getting complaints from sales reps about duplicate Leads ... Salesforce. The admin has already set up a matching rule for Leads.
What should the consultant recommend to resolve the issue?

A. Confirm the standard matching rule is inactivated.
B. Change the criteria for the standard Lead matching rule.
C. Change the criteria for the standard Contact matching rule.
D. Confirm the custom matching rule is activated.

Correct Answer: D
Section:
Explanation:
Confirming that the custom matching rule is activated is the best way to resolve the issue of duplicate leads in Salesforce. A matching rule is a rule that defines how records are compared for duplicates based on fields and fuzzy logic. A custom matching rule is a matching rule that can be created and customized by users based on their needs and preferences. A custom matching rule must be activated before it can be used by duplicate rules or other features that prevent or allow duplicates. By confirming that the custom matching rule is activated, the admin can ensure that leads are matched according to their criteria and duplicates are detected and handled accordingly.

QUESTION 72
Cloud Kicks requires its sales reps to 90 through an internal certification process on myTrallhead before they add specific groups of Products to Opportunities.
Which two solutions should be used to validate that sales reps have completed the myTrailhead badge?
Choose 2 answers

A. Use a validation rule on Opportunity Products to prevent a sales rep from adding Products marked as requiring the myTrailhead badge if the rep has yet to complete the badge.
B. Use a Process Builder process on Products marked as requiring the myTrallhead badge to automatically share the Products with sales reps who have completed the badge.
C. Use a validation rule on Products marked as requiring the myTrailhead badge to prevent those Products from being added to an Opportunity.
D. Use a separate once book for the Products requiring the myTrailhead badge and only share the once book with sales reps who have completed the badge-

Correct Answer: A, D
Section:
Explanation:
Using a validation rule on Opportunity Products can prevent a sales rep from adding Products marked as requiring the myTrailhead badge if the rep has yet to complete the badge. The validation rule can check the value of a custom field on the Product object that indicates whether the myTrailhead badge is required, and compare it with a custom field on the User object that tracks whether the sales rep has completed the badge. If the validation rule evaluates to true, it can display an error message and block the addition of the Product. Using a separate price book for the Products requiring the myTrailhead badge and only sharing the price book with sales reps who have completed the badge can also validate that sales reps have completed the myTrailhead badge. The price book can contain only the Products that require the badge, and it can be shared with sales reps who have a custom field on their User record that indicates they have completed the badge. This way, only those sales reps can access and add those Products to their Opportunities.

QUESTION 73
Cloud Kicks (CK) has implemented different sales stages across its varied product lines. CK wants to deploy Collaborative Forecasting to all sales users.
Which two statements should a consultant consider when enabling forecasting? Choose 2 answers

A. Opportunity Splits must be enabled at the same time.
B. Multiple Forecast Types must be created and activated.
C. A Single Category or Cumulative Forecast Rollup should be defined.
D. The Forecast tab should be visible to easily view the forecasts.

Correct Answer: B, D
Section:
Explanation:
Multiple Forecast Types must be created and activated to enable forecasting for different product lines that have different sales stages. A Forecast Type is a set of settings that define how forecasts are calculated and displayed for a specific business scenario, such as product line, territory, or revenue type. A Forecast Type can use either standard or custom opportunity fields to group and filter forecast data, such as Type, Product Family, or Territory. The Forecast tab should be visible to easily view the forecasts, as it allows users to see their forecast amounts, quotas, adjustments, and categories in a single page. Users can also drill down into forecast details, compare forecasts with other users or periods, and submit or approve forecasts from the Forecast tab.

QUESTION 74
Cloud Kicks has enabled the Einstein Lead Scoring feature and rolled out Sales Cloud Einstein to ptkst users. The pilot users are unable to view the Lead Score field on me Lead record page.
Which two steps should the consultant take to fix this issue?
Choose 2 answers

A. Add the Lead Score field to the Lead List View.
B. Add the Lead Score field to the Lead Page layout.
C. Assign the Einstein Lead Scoring permission set.
D. Assign the Sales Cloud Einstein permission set.

Correct Answer: B, C
Section:
Explanation:
Adding the Lead Score field to the Lead Page layout is a necessary step to fix the issue of pilot users not being able to view the Lead Score field on the Lead record page. The Lead Score field is a standard field that shows how likely a lead is to convert based on Einstein's analysis of historical data and predictive factors. The Lead Score field must be added to the Lead Page layout for users to see it on their lead records. Assigning the Einstein Lead Scoring permission set is another necessary step to fix the issue, as it grants users access to view and use Einstein Lead Scoring features, such as Lead Score, Lead Score Insights, and Lead Score Field History Tracking.

QUESTION 75
Cloud Kicks sales reps want to see all of their current opportunities, and the full details, with a minimal amount of navigation or dicks to cycle through them.
Which functionality should the consultant recommend?

A. Construct a new Sales Console app including opportunities.
B. Create a 'My Opportunities' report and open each opportunity in a new browser tab.
C. Create a 'My Team Opportunities' report and open each opportunity in a new browser tab.
D. From the 'My Opportunities' list view, select the Split View option.

Correct Answer: D
Section:
Explanation:
Selecting the Split View option from the 'My Opportunities' list view can help sales reps see all of their current opportunities and their full details with a minimal amount of navigation or clicks. The Split View option displays a collapsible panel on the left side of the screen that shows a list of records, such as opportunities, and a main panel on the right side that shows the details of a selected record. Sales reps can easily switch between different records by clicking on them in the left panel, without leaving or refreshing the page.

QUESTION 76
Cloud Kicks is running a campaign for the Shoe of the Month club. Sales management wants to use Campaign Influence features with Opportunities to attribute a percentage of success to influential campaigns.

Which feature will allow for revenue share with standard and custom attribution models?

A. Create a reporting snapshot for Campaigns.
B. Use sharing rules to give access to Campaign members.
C. Create a formula field to track Campaign Influence.
D. Use Customizable Campaign Influence for reporting.

Correct Answer: D
Section:
Explanation:
Customizable Campaign Influence is a feature that allows users to attribute revenue share to influential campaigns using standard or custom attribution models. An attribution model is a set of rules that determines how much credit each campaign receives for influencing an opportunity. For example, a 50/50 attribution model gives equal credit to all campaigns associated with an opportunity, while a First Touch attribution model gives 100% credit to only the first campaign that touched an opportunity. Customizable Campaign Influence can be enabled from Setup, and it requires that Campaign Influence is also enabled. Users can then add or edit Campaign Influence records from the Campaign Influence related list on Opportunity page layouts, and use reports and dashboards to analyze campaign performance and ROI.

QUESTION 77
A consultant it working with Cloud Kicks (CK) on its initial Sales Could implementation. CK wants its sales reps to be able to use Sales Cloud to track accounts, contacts, and opportunities before its global conference in 4 months.
What should the consultant recommend to meet the requirement?

A. Set obtainable metrics, goals, and milestones for the deadline.
B. Deploy the Salesforce mobile app to the team prior to the event.
C. Reschedule the event to ensure functionality is complete.
D. Implement additional features to make the team more productive-

Correct Answer: A
Section:
Explanation:
Setting obtainable metrics, goals, and milestones for the deadline is the best way to meet the requirement of tracking accounts, contacts, and opportunities before the global conference in 4 months. Metrics are measures of performance or progress that can be quantified and tracked. Goals are desired outcomes or results that can be achieved by following a plan or strategy. Milestones are significant events or stages that mark the completion of a part of a project or a goal. By setting obtainable metrics, goals, and milestones for the deadline, the consultant can ensure that the Sales Cloud implementation is realistic, manageable, and aligned with the client's expectations and needs.

QUESTION 78
Cloud Kicks has enabled territory forecasts to see how expected revenue compares between sales territories, and to determine which territory has dosed the most deals in a month. The territory hierarchy has three branches with child territories, where forecast managers may be assigned to a few of them.
Which two actions can forecast managers perform?
Choose 2 answers

A. Add territory forecast to the hierarchy.
B. Add a Forecasts tab to the Sales app.
C. View the territory forecasts as a single-page summary.
D. Share the forecast with any Salesforce user.

Correct Answer: C, D
Section:
Explanation:
Viewing the territory forecasts as a single-page summary and sharing the forecast with any Salesforce user are two actions that forecast managers can perform. A territory forecast is a forecast that shows how much revenue

is expected from a specific territory or group of territories. A single-page summary is a view of the territory forecast that displays all the territories in the hierarchy and their forecast amounts in one page. Forecast managers can use this view to compare and analyze the performance of different territories at a glance. Forecast managers can also share their forecasts with any Salesforce user who has access to the same forecast type, regardless of their role or territory assignment. This allows them to collaborate and communicate with other users about their forecasts.

QUESTION 79
The Cloud Kicks (CK) sales team works with two different types of leads: distributors and retailers. CK's management wants the sales team to follow two different lead qualification processes before converting the Lead into an opportunity.
Which three actions should a consultant recommend to meet this requirement?
Choose 3 answers

A. Create retailer and distributor lead processes.
B. Create a new profile and only assign one lead record type to it.
C. Add leads to different campaigns based on lead type.
D. Create Status picklist values specific to each lead type.
E. Create distributor and retailer lead record types.

Correct Answer: A, D, E
Section:
Explanation:
Creating retailer and distributor lead processes can help CK follow two different lead qualification processes before converting leads into opportunities, as it allows them to define different sets of picklist values for the Status field for each lead type. A lead process is a collection of stages that represent the steps that users take to qualify leads, such as Open, Contacted, Qualified, or Converted. Creating Status picklist values specific to each lead type can also help CK follow two different lead qualification processes, as it allows them to customize how they track and measure their progress with different types of leads. For example, they may have different criteria or actions for qualifying a retailer lead versus a distributor lead. Creating distributor and retailer lead record types can also help CK follow two different lead qualification processes, as it allows them to assign different page layouts, processes, and business logic for each lead type. A record type is a way to categorize records based on different business requirements or user profiles.

QUESTION 80
The sales director of retail products at Cloud Kicks wants to allow cloning of orders to help sales reps process repetitive orders.
What are two guidelines to consider when cloning an order with products? Choose 2 answers

A. A new order's currency or price book will remain the same If the original order has products.
B. The admin will be able to set up which fields can be cloned to a new order.
C. A cloned order must be associated with the same contract as the original order.
D. A cloned order's start date must fall between the associated contract's start and end dates.

Correct Answer: A, D
Section:
Explanation:
These are two guidelines to consider when cloning an order with products. An order is a confirmation of a sale that lists products sold or services rendered to a customer, along with prices and terms of delivery or service. An order can be cloned to create an exact copy of an existing order with all its products and schedules, which can save time and reduce errors when processing repetitive orders. However, there are some limitations and considerations when cloning an order, such as:
A new order's currency or price book will remain the same if the original order has products. This means that users cannot change these fields when cloning an order that has products, as they are determined by the products on the order.
A cloned order's start date must fall between the associated contract's start and end dates. This means that users cannot set a start date for a cloned order that is outside the validity period of the contract that the order is linked to, as this would violate the contract terms.

QUESTION 81
Good Kicks has the goal of generating high-quality leads by implementing Sales Cloud.
Which metrics should the consultant analyze to determine the success of this goal?

A. Total number of Leads created by a Sales Rep
B. Lead to Opportunity Conversion Rate
C. Lead to Quote Conversion Rate
D. Total number of Leads by source

Correct Answer: B
Section:
Explanation:
Lead to Opportunity Conversion Rate is a metric that measures how many leads are converted into opportunities in relation to the total number of leads generated or processed in a given period. This metric can help evaluate the quality of leads and the effectiveness of lead qualification processes by showing how well leads are turning into potential sales. A high Lead to Opportunity Conversion Rate indicates that the leads are well-targeted, qualified, and nurtured, and that the sales team is following up on them promptly and persuasively. A low Lead to Opportunity Conversion Rate may suggest that the leads are poorly sourced, unqualified, or neglected, and that the sales team is missing out on opportunities.

QUESTION 82
Northern Trail Outfitter has created a Complaints custom object related to Accounts. Due to the sensitive nature of these records, the object's visibility has been set to Private. A dedicated subnet of support users who will work on these items has been added to a Complaints Specialist public group. Only users within the Complaints Specialist public group should be able to view and edit any Compliant record.
Which two options should a consultant recommend to meet the requirements? Choose 2 answers

A. Use Apex managed sharing to grant record access to users In the Complaints Specialist public group and restrict manager visibility.
B. Uncheck the Grant Access Using Hierarchies checkbox in Sharing Settings for the Complaints object.
C. Create a catena-based sharing rule that grants Read/Write access to the Complaints Specialist public group.
D. Set the Complaint object's default visibility to allow only the users in the Complaints Specialist group to access the records.

Correct Answer: B, C
Section:
Explanation:
Unchecking the Grant Access Using Hierarchies checkbox in Sharing Settings for the Complaints object and creating a criteria-based sharing rule that grants Read/Write access to the Complaints Specialist public group are two options that can meet the requirements of restricting access to Complaint records to only users within the Complaints Specialist public group. Grant Access Using Hierarchies is a setting that determines whether users above a record owner in the role hierarchy can access that record. By unchecking this setting for the Complaints object, the consultant can prevent managers or other users higher in the role hierarchy from viewing or editing Complaint records that they do not own. A criteria-based sharing rule is a rule that grants access to records that meet certain criteria, such as field values, record types, etc. By creating a criteria-based sharing rule that grants Read/Write access to the Complaints Specialist public group, the consultant can ensure that only users in this group can view and edit any Complaint record, regardless of who owns it.

QUESTION 83
Cloud Kicks want to track different details for trade shows and customer webinars.
Which capability enables the use of custom fields, contextual validation rules, and varied layouts?

A. Parent Campaigns
B. Custom Picklist
C. Campaign Hierarchies
D. Record Types

Correct Answer: D
Section:
Explanation:
Record Types are a capability that enables the use of custom fields, contextual validation rules, and varied layouts for different types of campaigns. A record type is a way to offer different business processes, picklist values, and page layouts to different users based on their profiles. By creating record types for trade shows and customer webinars, Cloud Kicks can track different details for these types of campaigns by using custom fields, such as location, budget, attendance, etc. Cloud Kicks can also enforce contextual validation rules, such as requiring certain fields or values depending on the record type. Cloud Kicks can also display varied layouts for each record

type, such as showing or hiding certain fields or sections based on the campaign type.

QUESTION 84
Cloud Kicks has organization-wide defaults set to Private for Account.
With the rollout of Opportunity Teams, what should a consultant consider?

A. The Opportunity will be implicitly Write for the team,
B. Opportunity should be set to Public Read/Write first.
C. Account should be set to Public Read first.
D. The Opportunity's Account will be implicitly Read for the team.

Correct Answer: D
Section:
Explanation:
The Opportunity's Account will be implicitly Read for the team is something that the consultant should consider when rolling out Opportunity Teams with Private Account organization-wide defaults. An Opportunity Team is a group of users who work together on an Opportunity, such as sales reps, sales engineers, managers, etc. Each Opportunity Team member has a role and a level of access to the Opportunity and its related records, such as Products, Quotes, Activities, etc. Organization-wide defaults are the baseline level of access that users have to records they do not own or share. Private organization-wide defaults mean that only the record owner and users above them in the role hierarchy can view and edit the records. Implicit sharing is a type of sharing that grants additional access to records based on relationships between objects or users. Implicit Read means that users can view but not edit a record.
By rolling out Opportunity Teams with Private Account organization-wide defaults, the consultant should consider that the Opportunity Team members will have implicit Read access to the Opportunity's Account, meaning that they can view but not edit the Account record related to the Opportunity they are working on.

QUESTION 85
Cloud Kicks uses .pdf documents in Sales Cloud to help the sales team learn about new products. Which feature should a consultant recommend to store these documents?

A. Files sync
B. Salesforce Files
C. Document lists
D. Salesforce Knowledge

Correct Answer: B
Section:
Explanation:
Salesforce Files is the best feature to store .pdf documents in Sales Cloud to help the sales team learn about new products. Salesforce Files are files that can be uploaded and attached to records or shared with other users in Salesforce. Salesforce Files support various file types and formats, including .pdf documents. By using Salesforce Files, Cloud Kicks can store .pdf documents in Sales Cloud and make them available for the sales team to access and view from any device.

QUESTION 86
During a Discovery session at Cloud Kicks, a topic is highlighted that
How should the consultant proceed?

A. Conduct another Discovery session.
B. Define and submit a change order for the new items.
C. Revise the timeline for the new items.
D. Continue work because it is covered by the warranty.

Correct Answer: B
Section:

Explanation:
Defining and submitting a change order for the new items is the best way to proceed when a topic is highlighted that requires additional work outside of scope during a Discovery session at Cloud Kicks. A change order is a document that describes changes to an existing project scope, deliverables, timeline, costs, or responsibilities that have been agreed upon by both parties involved in a project. A change order also specifies how these changes will affect the original project plan and contract terms. By defining and submitting a change order for the new items, the consultant can ensure that Cloud Kicks is aware of and approves of the additional work required and how it will impact their project.

QUESTION 87
During the Deploy phase at Cloud Kicks, users are finding it difficult to use a new system, which is adoption.
How should the consultant avoid this issue in the future?

A. Design a solution during the Build phase.
B. Conduct a Beta review during the Validate phase.
C. Gain buy-in during the Analyze phase.
D. Develop test scripts during the Plan phase.

Correct Answer: C
Section:
Explanation:
Gaining buy-in during the Analyze phase is the best way to avoid user adoption issues in the future when working on a new system at Cloud Kicks. Buy-in is the acceptance or support of an idea or proposal by stakeholders or decision-makers who have influence or authority over its implementation or outcome. The Analyze phase is a stage of a project where requirements are gathered and validated, business processes are mapped and optimized, and solutions are designed and evaluated. By gaining buy-in during the Analyze phase, the consultant can ensure that the new system meets the needs and expectations of the users and stakeholders, and that they are involved and engaged in the project from the start. This can increase user satisfaction and adoption of the new system.

QUESTION 88
Cloud Kicks (CK) wants to migrate data from its existing enterprise resource planning (ERP) system to CK wants to organize its data using the unique ID that is a number type in the ERP.
What should the consultant recommend to meet the requirement?

A. Map the ERP unique ID to a custom external ID unique number field.
B. Create a text field and insert the ERP unique ID.
C. Use the ERP unique ID as the Salesforce ID.
D. Create an external ID unique number field in the ERP labeled ERP unique ID.'

Correct Answer: A
Section:
Explanation:
Mapping the ERP unique ID to a custom external ID unique number field is the best way to meet the requirement of organizing data using the unique ID that is a number type in the ERP. An external ID is a custom field that has the ''External ID'' attribute, meaning that it contains unique record identifiers from a system outside of Salesforce. A unique number field is a custom field that has the ''Unique'' attribute, meaning that it does not allow duplicate values in the field. By mapping the ERP unique ID to a custom external ID unique number field, Cloud Kicks can use this field to match records during data import or update operations, avoid duplicate records or incorrect data, and maintain data integrity between Salesforce and the ERP system.

QUESTION 89
Universal Containers is growing its international business. Domestic account executives believe that the standard price book has become difficult to use because there are too many records reflecting different currencies and country-specific product variations.
What should the consultant recommend to improve usability for account executives?

A. Create product families to enable users to filter by continent and country.
B. Use custom price books for domestic and international customers.
C. Use separate product catalogs for domestic and international customers.

D. Update the product naming conventions to include the currency in the product name.

Correct Answer: B
Section:
Explanation:
Using custom price books for domestic and international customers is the best way to improve usability for account executives who find the standard price book difficult to use because of different currencies and country-specific product variations. A price book is a list of products and their prices that account executives can use when creating opportunities. A custom price book is a price book that can be created and customized by users based on their needs and preferences. By using custom price books for domestic and international customers, account executives can easily select the appropriate price book for each opportunity based on the customer's location, currency, and product requirements.

QUESTION 90
Universal Containers has hired a new employee for the Global Sales Leadership team. The employee is intere in fostering friendly competition between account executives, with emphasis on reinforcing activities that dm sales. Historically, for every four prospect meetings held, one sale was generated.
Which action would help support the sales teams?

A. Create subscription reports to send daily prospect meetings planned to the Assigned user for those events.
B. Show a leaderboard on the regional sales dashboards highlighting the account executives who have created the most opportunities.
C. Show a leaderboard on the regional sales dashboards highlighting account executives who have held the most prospect meetings.
D. Create a dashboard that displays the most sales dosed by region using charts to show sale: green and lost opportunities in red.

Correct Answer: C
Section:
Explanation:
Showing a leaderboard on the regional sales dashboards highlighting account executives who have held the most prospect meetings is an action that would help support the sales teams and foster friendly competition between them. A leaderboard is a visual display that shows the ranking of individuals or groups based on a certain metric or performance indicator. A regional sales dashboard is a tool that shows data from one or more reports related to a specific region or market in a visual way, such as charts, gauges, tables, etc. A prospect meeting is an activity that represents an interaction with a potential customer who has shown interest in a product or service. By showing a leaderboard on the regional sales dashboards highlighting account executives who have held the most prospect meetings, the new employee can motivate and incentivize the sales teams to increase their prospecting efforts and activities, which can lead to more sales.

QUESTION 91
A Cloud Kicks sales team based in the U.S. wants to grow market share in Australia. The company has multicurrency enabled and has added the Australian Dollar as an available currency.
How should the consultant allow the sales team to report on Australian deal values in U.S. Dollars (USO)?

A. Set each sales user's default currency to the Australian Dollar.
B. Enable parenthetical currency conversion.
C. Create a formula field to perform a currency calculation.
D. Use USD for Australian Opportunity currencies.

Correct Answer: B
Section:
Explanation:
Enabling parenthetical currency conversion is the best way to allow the sales team to report on Australian deal values in U.S. Dollars (USD). Parenthetical currency conversion is a feature that displays converted currency amounts in parentheses next to the original currency amounts in reports and dashboards. For example, if an opportunity has an amount of 10,000 Australian Dollars (AUD), and the corporate currency is USD, enabling parenthetical currency conversion will show the amount as 10,000 AUD (7,500 USD) based on the exchange rate. By enabling parenthetical currency conversion, the sales team can easily see and compare Australian deal values in USD without having to manually calculate them.

QUESTION 92
Cloud Kicks has recently rolled out Lightning Experience and uses an ERP system as its system of record for customers. When a new Account has its first dosed/won opportunity, the ERP system should immediately update with information from the account, contact, and opportunity records related to the Account to record a new customer.

Which option should the consultant recommend to meet the requirement?

A. Identify AppExchange products that can be deployed to update the ERP with opportunity, account, and contact information from Salesforce.
B. Configure Outbound message to publish the opportunity wins and update the ERP with opportunity, account, and contact information from Salesforce.
C. Implement Platform Events to publish opportunity wins to the ESB, which will call back for account, contact, and opportunity information and automatically update the ERP accordingly.
D. Use enterprise ETL tools to extract closed/won opportunities from Salesforce and update the ERP with opportunity, account, and contact information from Salesforce.

Correct Answer: C
Section:
Explanation:
Implementing Platform Events to publish opportunity wins to the ESB, which will call back for account, contact, and opportunity information and automatically update the ERP accordingly is the best option to meet the requirement of updating the ERP system with information from Salesforce when a new Account has its first closed/won opportunity. Platform Events are events that are published and consumed by applications inside or outside of Salesforce using an event-driven architecture. An ESB (Enterprise Service Bus) is a software component that connects different applications and systems using common standards and protocols. By implementing Platform Events to publish opportunity wins to the ESB, Cloud Kicks can trigger an event whenever an opportunity is closed/won for a new Account in Salesforce, and send it to the ESB. The ESB can then call back for account, contact, and opportunity information from Salesforce using APIs (Application Programming Interfaces), and automatically update the ERP system with this information accordingly. This way, Cloud Kicks can ensure data synchronization and accuracy between Salesforce and the ERP system without having to use third-party tools or manual processes.

QUESTION 93
Cloud Kicks wants to utilize Opportunities to report and track subscriptions to its Shoe of the Month club. Subscribers can make a single payment or pay weekly, monthly, or quarterly.
Which solution should the consultant recommend to meet the requirement?

A. Enable schedules on the Product object.
B. Activate schedules on the Opportunity object.
C. Implement contracts with a lookup to the Opportunity object.
D. Configure assets with a lookup to the Opportunity object.

Correct Answer: A
Section:
Explanation:
Schedules on the Product object allow users to track the revenue and quantity of products over time, such as for subscription or installment payments. Schedules can be enabled for any product that has a schedule type of Revenue or Quantity, and they can be customized to match the payment terms of each opportunity.

QUESTION 94
The Cloud Kicks admin is planning to deploy new functionality as part of its quarterly update process. The consultant has recommended completing the update outside of business hours to avoid impacting users.
Where should the consultant direct the admin to check for scheduled system maintenance?

A. Company Profile
B. Trailblazer Community
C. Trailhead
D. Salesforce Trust

Correct Answer: D
Section:
Explanation:
Salesforce Trust is a website that provides information about the performance, security, compliance, and maintenance of the Salesforce platform. Users can check for scheduled system maintenance on Salesforce Trust by selecting their instance and viewing the maintenance calendar. Users can also subscribe to receive notifications about maintenance events via email or RSS feed.

QUESTION 95

Organization-wide default settings for Account is set to Private at Cloud Kicks- Users are unable to see each others accounts.
When a Salesforce admin assigns User A as the owner of an opportunity related to User B's account, which additional access will User A gain?

A. User A will have Read-Write access to the opportunity's Account and its related contact records.
B. User A will have Read-Only access to the opportunity's Account record.
C. User A will have Read-Only access to the opportunity's Account and its related contact records.
D. User A will have Read-Write access only to the opportunity's Account record.

Correct Answer: A
Section:
Explanation:
When a Salesforce admin assigns User A as the owner of an opportunity related to User B's account, User A will have Read-Write access to the opportunity's Account and its related contact records. This is because of the implicit sharing rules that grant access to parent and child records based on the organization-wide default settings. Since the organization-wide default setting for Account is set to Private, users are unable to see each other's accounts by default. However, when a user owns an opportunity that is related to another user's account, the user gains Read-Write access to that account and its related contacts, regardless of the sharing settings for those objects. This ensures that the user can view and edit the account and contact information that is relevant to their opportunity.

QUESTION 96
Cloud Kicks is concerned that the sales team is taking longer to dose opportunities in comparison to the same time last year. The VP of sales wants to determine the number of closed deals on a monthly basis and compare the month-over-month results.
Which two actions should the consultant take to meet the requirement?
Choose 2 answers

A. Create a report based on the Opportunity reporting snapshot.
B. Create a dashboard component and schedule the dashboard to refresh monthly.
C. Schedule a reporting snapshot of the Opportunity History object to run monthly.
D. Schedule a reporting snapshot of the Opportunity object to run monthly.

Correct Answer: B, C
Section:
Explanation:
Creating a dashboard component and scheduling the dashboard to refresh monthly can help the VP of sales determine the number of closed deals on a monthly basis and compare the month-over-month results. A dashboard is a visual display of key metrics and trends for records in Salesforce. A dashboard component is a chart, table, metric, or gauge that shows data from a source report. Users can create a dashboard component that shows the number of closed deals for each month based on a report that filters opportunities by stage and close date. Users can also schedule the dashboard to refresh monthly, so that it always shows the latest data.
Scheduling a reporting snapshot of the Opportunity History object to run monthly can also help the VP of sales determine the number of closed deals on a monthly basis and compare the month-over-month results. A reporting snapshot is a report that captures data at a specific point in time and stores it in a custom object. Users can create a reporting snapshot that captures data from the Opportunity History object, which tracks changes in amounts or stages for opportunities, and stores it in a custom object with fields such as Month, Year, Stage, and Count. Users can then schedule the reporting snapshot to run monthly, so that it always captures the latest data.

QUESTION 97
A consultant has conducted Discovery sessions with Cloud Kicks stakeholders and is ready to start gathering user cases for Sales Processes.
Which two groups should provide content for the use cases? Choose 2 answers

A. Sales reps
B. Executives
C. Finance team
D. Sales operations

Correct Answer: A, D

Section:
Explanation:
Sales reps and sales operations are two groups that should provide content for the use cases for sales processes. A use case is a description of how users perform tasks or achieve goals using a system or process, such as creating an opportunity or closing a deal. A use case typically includes information such as actors, preconditions, postconditions, main flow, alternative flows, and exceptions. Sales reps are the primary users of sales processes, so they should provide content for the use cases based on their experience and needs. Sales operations are responsible for designing and optimizing sales processes, so they should provide content for the use cases based on their analysis and best practices.

QUESTION 98
Cloud Kicks (CK) plans to implement Advanced Currency Management for its Salesforce implementation. CK has Roll-up Summary fields on the Account and Opportunity.
What should CK consider when enabling Advanced Currency Management in its Salesforce org?

A. Dated exchange rates are used in Opportunity forecasting or currency fields in other types of reports.
B. Opportunity Roll-up Summary fields will update from the Opportunity Line Item object.
C. Account Roll-up Summary fields will update from the Opportunity object.
D. Account cross-object formulas always use the dynamic conversion rate for currency conversion.

Correct Answer: C
Section:
Explanation:
Account Roll-up Summary fields will update from the Opportunity object is something that Cloud Kicks should consider when enabling Advanced Currency Management in its Salesforce org. A Roll-up Summary field is a field that calculates values from related records, such as count, sum, min, max, etc. Advanced Currency Management is a feature that allows users to enable dated exchange rates and track historical exchange rates in Salesforce. By enabling Advanced Currency Management, Cloud Kicks can use dated exchange rates to convert currency amounts based on specific dates or ranges of dates. When using dated exchange rates, Account Roll-up Summary fields will update from the Opportunity object based on the close date of the opportunities, regardless of whether the opportunities are open or closed.

QUESTION 99
A couple of users at Cloud Kicks (CK) own more than 10,000 records. The CK admin has noticed that making changes to the sharing model is taking increasingly more time.
What are two solutions the consultant should implement to resolve the Issue?
Choose 2 answers

A. Move the users to the top of the role hierarchy.
B. Move the users to the bottom of the role hierarchy.
C. Mass transfer the records to another role in the role hierarchy.
D. Remove the users from the role hierarchy.

Correct Answer: C, D
Section:
Explanation:
Mass transferring the records to another role in the role hierarchy and removing the users from the role hierarchy are two solutions that can resolve the issue of making changes to the sharing model taking increasingly more time for users who own more than 10,000 records. A mass transfer is an operation that allows users to transfer ownership of multiple records from one user to another user at once. A role hierarchy is a structure that defines how users are organized and how data access is granted based on their roles. By mass transferring the records to another role in the role hierarchy, Cloud Kicks can reduce the number of records owned by each user and distribute them more evenly among other users in different roles. By removing the users from the role hierarchy, Cloud Kicks can prevent these users from inheriting access to records owned by other users in their role or below their role, which can slow down the sharing model changes.

QUESTION 100
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QUESTION 101
Universal Containers is realigning sales territories and needs to update ownership across its 400,000 accounts. The organization-wide default for Accounts is Private.
Which two factors should the consultant consider when updating the sales territories and Account owners?
Choose 2 answers

A. The organization-wide default should be set to Public before the update can be performed.
B. The Salesforce Platform can update up to 200 accounts at a time.
C. The data update will cause sharing recalculations and should be completed during off-peak hours.
D. The team can defer sharing calculations to decrease the risk of lock errors during the data update.

Correct Answer: C, D
Section:
Explanation:
The data update will cause sharing recalculations and should be completed during off-peak hours and the team can defer sharing calculations to decrease the risk of lock errors during the data update are two factors that should be considered when updating the sales territories and Account owners for 400,000 accounts with Private organization-wide defaults. Sharing recalculations are processes that update record access based on changes to sharing settings or ownership. Off-peak hours are times when there is less user activity or system load on Salesforce. Deferring sharing calculations is an option that allows users to postpone or schedule sharing recalculations for later times instead of running them immediately. Lock errors are errors that occur when two or more processes try to access or modify the same record at the same time.
By considering these two factors, Universal Containers can ensure that the data update is performed efficiently and effectively without affecting user experience or data integrity. By completing the data update during off-peak hours, Universal Containers can avoid impacting user performance or availability during peak hours when there is more user activity or system load on Salesforce. By deferring sharing calculations, Universal Containers can reduce the risk of lock errors during the data update by running them at a later time when there is less concurrent access or modification of records.

QUESTION 102
Users at Cloud Kicks (CK) say the global search is returning too many results when searching for contacts. CK's admin confirmed that users have the correct permissions and record access to the contacts they want to see.
What should a consultant recommend to yield better search results?

A. Use quotation marks operator around contact's first and last name.
B. Add company name next to contacts full name in the search window.
C. Add LIKE keyword next to contact's full name in the search window.
D. Use parentheses operator to limit search to the Contacts object.

Correct Answer: A
Section:
Explanation:
Using quotation marks operator around contact's first and last name is a recommendation that can yield better search results when searching for contacts in global search. Global search is a feature that allows users to search

for records or information across multiple objects and fields in Salesforce. Quotation marks operator is an operator that can be used in global search to find an exact phrase or match in a record or field. For example, searching for ''John Smith'' will return only records or fields that contain John Smith as an exact phrase or match, not John Doe or Adam Smith or John Smithson. By using quotation marks operator around contact's first and last name, Cloud Kicks users can narrow down their search results and find the contacts they are looking for more easily and quickly.

QUESTION 103
An executive at Cloud Kicks (CK) has asked its admin to create a diagram to show the high level processes the business. CK plans to use the diagram to show the context of a new process within the overall business whole.
What should the admin create to meet this requirement?

A. Capability Model
B. Strengths, Weaknesses, Opportunities, Threats (SWOT) Diagram
C. Suppliers, Imports, Processes, Outputs, Customers (SIPOC) Diagram
D. Value Stream Map

Correct Answer: A
Section:

QUESTION 104
The Discovery phase with Cloud Kicks (CK) has just ended. CK wants a visual way to see how the new processes will work. CK's process is complex and requires multiple slides.
What should the consultant design to give CK this high-level view?

A. SIPOC Map
B. Value Stream Map
C. Capability Model
D. Universal Process Notation

Correct Answer: C
Section:

QUESTION 105
Cloud Kicks has identified the KPIs it wants to track for the year. The inside sales team wants a visual way to see the team's progress for the year.
What should the consultant recommend to meet the requirement?

A. Modify a report based on KPIs.
B. Set up a dashboard with the KPI reports.
C. Set up a Path based on the KPIs.
D. Install a KPI Tracker app from the AppExchange.

Correct Answer: D
Section:

QUESTION 106
A sales rep owns an opportunity and can view the associated account, but is unable to view contacts on that account.
What should the consultant recommend to allow account owners to selectively share an account's contacts with opportunity owners?

A. Add opportunity owners to the Opportunity Team and configure contact sharing.
B. Transfer account ownership from themselves to the opportunity owner.
C. Transfer contact ownership from themselves to the opportunity owner.

D. Add opportunity owners to the Account Team and configure contact sharing.

Correct Answer: D
Section:

QUESTION 107
Cloud Kicks uses Salesforce in Lightning Experience to manage business Accounts and Person Accounts. The sales director wants to associate Person Accounts to business Accounts and/or Contacts.
Which Salesforce feature should the consultant recommend to meet these requirements?

A. Use a junction object between Accounts and Contacts.
B. Use the Contacts to Multiple Accounts feature.
C. Create a custom lookup from Accounts to Contacts.
D. Create a reverse lookup from Contacts to Accounts.

Correct Answer: B
Section:

QUESTION 108
Universal Containers is migrating data from a legacy system into Salesforce.
Which two considerations should a consultant take into account when importing Campaign Members?
Choose 2 answers

A. Leads, Contacts, and Business Accounts can be Campaign Members.
B. The Marketing User feature license must be assigned.
C. The Campaign ID is required in the import file.
D. The Status of the Campaign Member is optional.

Correct Answer: B, C
Section:

QUESTION 109
Universal Containers recently implemented Sales Cloud. Stakeholders want insights into how logging interactions with customers impacts the number of won sales deafs.
Which report should the consultant create to meet the requirement?

A. Closed Won Opportunities by Account
B. Closed Won Opportunities with Activities
C. Closed Won Opportunities by the sales team
D. Closed Won Opportunities with Recommendations

Correct Answer: B
Section:

QUESTION 110
In the Discovery phase of a Sales Cloud implementation, what are three effective ways a consultant can determine the design of the system? Choose 3 answers

A. Schedule training.
B. Establish performance benchmarks.

C. Observer end users.
D. Administrator a survey.
E. Host a focus group.

Correct Answer: B, D, E
Section:

QUESTION 111
Universal Containers (UC) deployed Sales Cloud 3 months ago to the North American sales teams. One of the reasons UC selected Sales Cloud is its mobile support which provides flexibility for sales reps.
How should the consultant assure UC's management that Sales Cloud is being successfully adopted on mobile devices?

A. Download the Login History report and filter by device type.
B. Review the user profiles for mobile device permissions.
C. Report on the opportunity records created on a mobile device.

Correct Answer: C
Section:
Explanation:
To assure UC's management that Sales Cloud is being successfully adopted on mobile devices, the consultant should report on the opportunity records created on a mobile device. This metric directly demonstrates that sales reps are actively using mobile devices to perform their core activities, such as creating and managing opportunities. By providing tangible evidence of mobile usage, the consultant can validate the adoption and effectiveness of the mobile solution. Salesforce provides various reporting tools to track and analyze mobile device usage and user activity.

QUESTION 112
Cloud Kicks (CK) has requested a Statement of Work (SOW) that clearly details who will train users on new features and how the training will be delivered.
Which section of a SOW should the consultant discuss with CK to meet the requirement?

A. Scope
B. Background
C. Terms and Conditions

Correct Answer: A
Section:
Explanation:
The Scope section of a Statement of Work (SOW) is where the consultant should detail who will be responsible for training users on new features and how the training will be delivered. The Scope section outlines the specific tasks, deliverables, and responsibilities of both the consulting team and the client. Including detailed information about the training plan, including trainers, training methods, schedules, and any materials to be used, ensures that both parties have a clear understanding of the training expectations and responsibilities.

QUESTION 113
Cloud Kicks rolled out Sales Cloud recently. The VP of sales wants to display a view of internal and external data on the lifetime spend for each account on the Salesforce account detail page.
Which option should a consultant recommend to meet this requirement?

A. Salesforce Data Pipelines
B. Einstein Discovery
C. Sales Engagement

Correct Answer: A
Section:
Explanation:

To display a view of internal and external data on the lifetime spend for each account on the Salesforce account detail page, the consultant should recommend Salesforce Data Pipelines. Salesforce Data Pipelines allow users to integrate and transform data from various sources within Salesforce, enabling the creation of comprehensive views that include both internal and external data. This feature is ideal for combining different data sets and presenting them in a meaningful way on account records.

QUESTION 114
The VP of sales at Cloud Kicks wants the sales team to use the Salesforce mobile app to complete their tasks. The sales team needs to create and edit leads, contacts, and opportunities with ease.
Which feature should the consultant recommend the sales team use?

A. Smart Actions
B. Lightning Mobile Component
C. Einstein Activity Capture

Correct Answer: B
Section:
Explanation:
To enable the sales team to create and edit leads, contacts, and opportunities with ease using the Salesforce mobile app, the consultant should recommend the use of Lightning Mobile Components. Lightning Mobile Components provide a customizable and flexible interface that enhances the mobile user experience, allowing sales reps to perform essential tasks quickly and efficiently. These components are designed to be mobile-friendly and support the creation and editing of various records directly from the mobile app.

QUESTION 115
Cloud Kicks is restructuring its sales teams to align with its product lines. Each sales rep will focus only on the accounts they've been assigned.
Sales reps will run specific product upsell processes.
Which action should the consultant take to support a successful sales team transition?

A. Meet with territory sales leadership to design territory assignment rules.
B. Meet with sales reps to review products they are assigned and implement Opportunity Teams.
C. Meet with executive sales leadership to understand the requirements for record sharing.

Correct Answer: A
Section:
Explanation:
To support a successful sales team transition when restructuring sales teams to align with product lines, the consultant should meet with territory sales leadership to design territory assignment rules. Territory management ensures that sales reps are assigned to the correct accounts and territories based on the new structure. Designing territory assignment rules will help in automatically assigning the right accounts to the appropriate sales reps, streamlining the transition and ensuring that each sales rep focuses on the accounts they have been assigned. Salesforce's Territory Management functionality provides a robust framework for managing and assigning territories efficiently.

QUESTION 116
Cloud Kicks has purchased a list of prospects and wants sales reps to contact and measure the return on investment (ROI) of the purchased list.
Which solution should the consultant recommend?

A. Import the list as new Leads and update the Lead Source to ''Purchased Lead''.
B. Import the prospects as Contacts and assign them to Accounts.
C. Import the list as new Leads and map the Campaign during import.

Correct Answer: C
Section:
Explanation:
To measure the return on investment (ROI) of the purchased list of prospects, the consultant should recommend importing the list as new Leads and mapping the Campaign during import. By associating the leads with a

specific campaign, Cloud Kicks can track the effectiveness of the purchased list and measure ROI through campaign reports. This approach allows sales reps to contact the leads and enables the organization to analyze the performance of the campaign linked to the purchased leads. Salesforce's campaign management and lead tracking features support detailed ROI analysis and reporting.

QUESTION 117
Cloud Kicks recently launched Sales Cloud, Admins need to know the pages with the highest traffic.
Which option should a consultant recommend to meet this requirement?

A. Install the Salesforce Adoption Dashboards package from AppExchange.
B. Create a custom report based on Lightning Exit By Page Metrics.
C. Create a custom report based on Lightning Usage By Browser Metrics.

Correct Answer: A
Section:
Explanation:
To identify the pages with the highest traffic in Salesforce, a consultant should recommend installing the Salesforce Adoption Dashboards package from AppExchange. This package provides a set of pre-built dashboards and reports that offer insights into user adoption and engagement metrics, including the most visited pages. These dashboards can help admins understand which pages are most frequently used, aiding in the optimization of user experience and identifying areas for further training or improvement.

QUESTION 118
Universal Containers (UC) hired a consulting company to implement Sales Cloud. This will be the third CRM application UC has used in the past 5 years. Employees have failed to adopt the previous two applications.
Which step should be part of UC's plan to help drive adoption of Sales Cloud?

A. Identify change management champions.
B. Implement User Acceptance Testing (UAT).
C. Revoke user access to legacy systems.

Correct Answer: A
Section:
Explanation:
To drive adoption of Sales Cloud, Universal Containers (UC) should include the identification of change management champions as part of their plan. Change management champions are influential employees who can advocate for the new system, provide support to their peers, and help overcome resistance to change. Their involvement is crucial in promoting user adoption by demonstrating the benefits of the new CRM system and encouraging others to embrace it. According to Salesforce best practices, having internal advocates can significantly improve the success rate of CRM implementations.

QUESTION 119
Cloud Kicks (CK), a large global organization, is rolling out a complex Salesforce Release to its staff located in offices around the world,
Which approach should the consultant recommend that CK use for training this audience?

A. Leverage Trailhead and documentation.
B. Conduct Train-the-trainer sessions,
C. Configure In-App Guidance.

Correct Answer: B
Section:
Explanation:
For a large global organization like Cloud Kicks (CK) rolling out a complex Salesforce release, the consultant should recommend conducting Train-the-trainer sessions. This approach involves training a select group of knowledgeable users (trainers) who will then train other users in their respective locations. This method ensures that training is consistent and can be tailored to local needs, making it more efficient and effective for large and geographically dispersed teams. Salesforce best practices highlight the importance of scalable and localized training for global implementations to ensure comprehensive user adoption and understanding.

QUESTION 120
Cloud Kicks (CK) has recently lost several large deals to a competitor. CK management wants to start tracking the reasons why opportunities are being lost.
What is the most efficient way for a consultant to meet this requirement?

A. Create a Competitors channel in Slack to share insights and stories.
B. Create a new custom object and automation to track competitors.
C. Create a new custom field on the Opportunity object.

Correct Answer: C
Section:
Explanation:
To efficiently track the reasons why opportunities are being lost, the consultant should create a new custom field on the Opportunity object. This custom field can be used to capture standardized reasons for lost opportunities, allowing for consistent data entry and easy reporting. This approach is straightforward to implement and leverages the existing data structure, ensuring that the information is readily available for analysis and strategic decision-making. Salesforce best practices recommend using custom fields for tracking specific business metrics to enhance data visibility and accuracy.

QUESTION 121
When addressing challenges within Cloud Kicks' Sales Cloud project, which approach should a consultant prioritize to extend declarative development effectively?

A. Prioritize standard Salesforce features to manage costs while ensuring project success.
B. Assess project requirements to decide if custom development or third-party apps are needed, considering budget and resources,
C. Opt for custom development, weighing long-term scalability and maintenance against quick solutions.

Correct Answer: B
Section:
Explanation:

When addressing challenges within Cloud Kicks' Sales Cloud project, the consultant should prioritize assessing project requirements to decide if custom development or third-party apps are needed, considering budget and resources. This approach ensures that the solution is tailored to the specific needs of the project while balancing cost and resource constraints. By evaluating both custom development and third-party applications, the consultant can choose the most effective solution that meets the project's requirements and adheres to best practices for scalability and maintainability. Salesforce recommends evaluating standard features, custom solutions, and third-party apps to find the best fit for the project's needs.

QUESTION 122
Cloud Kicks has a Web-to-Lead form on its website. Following an update to the form to add new picklist values, some leads are routing to the default lead owner.
What should the consultant validate when troubleshooting the issue?

A. The picklist values are part of Lead assignment rule criteria.
B. A new web-to-lead form needs to be created to reflect the new picklist values.
C. Picklist values are included in only one rule entry.

Correct Answer: A
Section:
Explanation:
When troubleshooting why some leads are routing to the default lead owner after an update to the Web-to-Lead form, the consultant should validate that the new picklist values are part of the Lead assignment rule criteria. Lead assignment rules determine how leads are routed based on specified criteria. If the new picklist values are not included in these criteria, leads with those values will not match any rule and will be assigned to the default lead owner. Ensuring that all picklist values are accounted for in the assignment rules is crucial for proper lead routing.

QUESTION 123
Cloud Kicks has recently hired a new inside sales team. Management wants to ensure that steps in the sales process are clear and adhered to by the team. Each step must have clear guidelines, support materials, and coaching tips.

What should the consultant recommend to support the new sales team and management?

A. Create Validation Rules on the Opportunity Stage field.
B. Create a flow paired to each of the Opportunity stages.
C. Create a Path on the Opportunity object.

Correct Answer: C
Section:
Explanation:
To ensure that steps in the sales process are clear and adhered to by the new inside sales team, the consultant should recommend creating a Path on the Opportunity object. Salesforce Path provides a visual representation of the stages in a business process. It allows administrators to define key fields, guidance for success, and specific steps that need to be completed at each stage. This feature is ideal for providing clear guidelines, support materials, and coaching tips for each step of the sales process, helping sales teams stay on track and adhere to best practices.

QUESTION 124
Cloud Kicks is utilizing Advanced Currency Management. The sales director submitted a request to display the total amount of all the open opportunities related to the account on the Account page layout.
How should the consultant implement a solution to meet the requirement?

A. Use a record-triggered flow to set the value on the account.
B. Create a roll-up summary field on the Account object.
C. Use 2 custom formula field on the Opportunity object,

Correct Answer: A
Section:
Explanation:
To display the total amount of all the open opportunities related to the account on the Account page layout while using Advanced Currency Management, the consultant should use a record-triggered flow to set the value on the account. Advanced Currency Management complicates the use of standard roll-up summary fields due to multiple currency rates. A record-triggered flow can be configured to calculate the total amount of open opportunities and update a custom field on the Account record accordingly, ensuring the displayed amount is accurate and up-to-date.

QUESTION 125
When emails sync by Einstein Activity Capture, how are the emails matched to Sales Cloud records?

A. Matching is based on the standard Email field.
B. Matching is based on any Email field.
C. Matching is based on Full Name and standard Email field.

Correct Answer: A
Section:
Explanation:
When emails sync by Einstein Activity Capture, the matching to Sales Cloud records is based on the standard Email field. Einstein Activity Capture automatically associates emails and events with the correct Salesforce records by looking at the email addresses of the recipients. The standard Email field on Contact, Lead, and User objects is used to make these associations, ensuring that activities are accurately reflected in the related records.

QUESTION 126
Northern Trail Outfitters (NTO) finished implementing Sales Cloud for a mid-market sales team. Sales management wants to track data completeness.
Which common metric should the consultant recommend that NTO use to measure core Sales Cloud data?

A. Field Usage
B. Record Count
C. User Adoption

Correct Answer: A
Section:
Explanation:
To measure core Sales Cloud data completeness, the consultant should recommend using Field Usage as a common metric. Field Usage metrics help track how often key fields are populated in records, providing insights into data completeness and quality. This metric helps sales management ensure that essential information is being captured consistently across records, which is crucial for accurate reporting and analysis.

QUESTION 127
Some of the large accounts at Northern Trail Outfitters have many contacts. Sales reps want to see how these contacts relate to each other and understand the reporting structure.
Which feature should the consultant recommend to meet this requirement?

A. Contact Hierarchy
B. Contacts to Multiple Accounts
C. Contact Roles

Correct Answer: A
Section:
Explanation:
To help sales reps see how contacts relate to each other and understand the reporting structure within large accounts, the consultant should recommend using the Contact Hierarchy feature. Contact Hierarchy provides a visual representation of the relationships between contacts within an account, showing the reporting structure and connections. This feature is particularly useful for managing complex accounts with multiple contacts and understanding their organizational structure.

QUESTION 128
A consultant is preparing to release an updated version of a sales process they have been working on for an existing Sales Cloud client.
Which action should the consultant take first to ensure a smooth rollout for the sales team?

A. Conduct a series of informational sessions with the sales team to explain the benefits of the new sales process and address common questions in an online FAQ.
B. Implement a program to incentivize users and publicly reward early adopters to motivate others and create a sense of competition within the sales team.
C. Create a plan for implementation, drive awareness with the sales team, design training and coaching programs, update and document workflows, and measure success.

Correct Answer: C
Section:
Explanation:
To ensure a smooth rollout of an updated sales process, the consultant should start by creating a comprehensive implementation plan. This plan should include driving awareness among the sales team, designing training and coaching programs, updating and documenting workflows, and measuring success. A structured approach helps ensure that the sales team understands the changes, receives proper training, and can adapt to the new process effectively. This method aligns with Salesforce best practices for managing change and ensuring user adoption.

QUESTION 129
Sales leadership at Universal Containers is concerned that sales reps are negotiating deals with contacts without the authority to make a decision, resulting in lost deals.
What should the consultant recommend to resolve the issue?

A. Allow sales reps to mark the contact on each opportunity as ''Primary'' to indicate the decision maker.
B. Require sales reps to add the stakeholder as the decision maker on each opportunity before the rep can progress the stage.
C. Enable Opportunity Teams so sales reps can track the decision maker for each opportunity.

Correct Answer: B
Section:
Explanation:
To ensure that sales reps are negotiating with contacts who have the authority to make decisions, the consultant should recommend requiring sales reps to add the stakeholder as the decision maker on each opportunity

before they can progress the stage. This approach enforces accountability and ensures that sales reps are identifying and engaging with the appropriate decision-makers early in the sales process. Implementing such a requirement helps reduce the risk of negotiating with non-decision makers and increases the likelihood of successful deals.

QUESTION 130
Universal Containers uses Sales Territories and is working with a consultant to reassign Accounts into new territories.
Which attribute of Sales Territories should the consultant consider when developing the new territory model?

A. The system administrator profile is required to run territory planning reports.
B. A model must be activated in order to view reassigned accounts.
C. All Account assignment rules should be run when the model state is set to Planning.

Correct Answer: B
Section:
Explanation:
When working with Sales Territories and reassigning Accounts into new territories, the consultant should consider that a territory model must be activated in order to view reassigned accounts. Only once the model is activated will the new territory assignments take effect, and accounts will be reassigned according to the new rules defined in the model. This step is crucial for ensuring that the reassignment process is completed and visible to users.

QUESTION 131
The admin at Universal Containers has been getting complaints from sales reps about duplicate leads within Sales Cloud. The admin has already set up a Matching Rule for Leads.
What should the consultant recommend to resolve the issue?

A. Change the criteria for the standard Lead Matching Rule.
B. Confirm the standard Lead Matching Rule is deactivated.
C. Confirm the custom Lead Matching Rule is activated.

Correct Answer: C
Section:
Explanation:
To resolve the issue of duplicate leads within Sales Cloud, the consultant should recommend confirming that the custom Lead Matching Rule is activated. While the admin has set up a Matching Rule for Leads, it is essential to ensure that the correct custom rule is active and functioning as intended. This will help in identifying and managing duplicates more effectively, reducing complaints from sales reps.

QUESTION 132
Cloud Kicks (CK) is planning to use Person Accounts to maintain information on its retail customers. CK likes to track connections among customers to capture household relationships, referrals, and so on. One customer can have many relationships.
What should a consultant consider when implementing Person Accounts and supporting many relationships between customers in Salesforce?

A. Use Contacts for retail customers and use Accounts to maintain relationships.
B. Enable Contacts to Multiple Accounts to create indirect relationships between two or more Person Accounts.
C. Create a custom field to establish relationship and create files among Person Accounts.

Correct Answer: B
Section:
Explanation:
When implementing Person Accounts and supporting many relationships between customers in Salesforce, the consultant should consider enabling Contacts to Multiple Accounts. This feature allows for the creation of indirect relationships between two or more Person Accounts, which is ideal for tracking household relationships, referrals, and other connections. It provides a flexible way to manage complex relationships without needing to create custom fields or objects.

QUESTION 133
Cloud Kicks wants to assign territories in bulk to Opportunities.
What should the consultant do to meet the requirement?

A. Update Opportunity sales team with territory assignments.
B. Schedule auto-assignment rules in the territory model.
C. Run the filter-based Opportunity territory assignment.

Correct Answer: C
Section:
Explanation:
To assign territories in bulk to Opportunities, the consultant should run the filter-based Opportunity territory assignment. This feature allows users to apply territory assignments to a large number of opportunities based on specified criteria or filters. This method is efficient for bulk assignments and ensures that opportunities are accurately aligned with the appropriate territories based on predefined rules and conditions.

QUESTION 134
Cloud Kicks wants to enable sales reps to view an Individual team member's split percentage when the split percentage is less than 100% of the revenue amount.
Which attribution method should the consultant recommend?

A. Opportunity Percentage Split
B. Opportunity Overlay Split
C. Opportunity Amount Split

Correct Answer: A
Section:
Explanation:

The Opportunity Percentage Split method in Salesforce allows for revenue sharing among team members. Each member can be assigned a specific percentage of the revenue. This method is ideal when the split percentage is less than 100% of the revenue amount because it allows for granular control over how revenue is distributed among team members. According to Salesforce documentation, Opportunity Splits can be set up to reflect different sales scenarios, including revenue recognition and compensation. The Opportunity Percentage Split method specifically supports scenarios where splits add up to less than 100%.
Salesforce Opportunity Splits Overview
Setting Up Opportunity Splits

QUESTION 135
Universal Containers has implemented a lead qualification process that uses a lead scoring formul a. Upon review, many of the converted leads with the highest scores had little interest in making a purchase.
Which modification to the current lead qualification process should a consultant recommend?

A. Include a measure for the number of marketing touches.
B. Increase points for actions that Indicate intent.
C. Evaluate each record against the target marketing persona.

Correct Answer: C
Section:
Explanation:
When converted leads with high scores show little interest in purchasing, it indicates that the lead scoring model may not be accurately reflecting true purchase intent. Evaluating each record against the target marketing persona involves comparing the characteristics of the lead to an ideal customer profile, which helps in ensuring that the scoring is more aligned with actual buying intent. By refining the lead qualification process to better match the target persona, sales teams can prioritize leads that are more likely to convert into customers.
Improving Lead Scoring with Personas
Lead Management Best Practices

QUESTION 136
Northern Trail Outfitters launched Salesforce for its EMEA subsidiary 3 months ago and wants to gain insight into usage.
Which option should a consultant recommend to meet this requirement?

A. Analyze the Setup Audit Trail to determine the number of logins per day.
B. Create and subscribe to a custom report of active users by role.
C. Install the Salesforce Adoption Dashboard from AppExchange.

Correct Answer: C
Section:
Explanation:
The Salesforce Adoption Dashboard available on the AppExchange provides a comprehensive set of reports and dashboards designed to help organizations monitor and increase Salesforce adoption. It includes metrics on user logins, feature usage, and data quality, making it an effective tool for gaining insights into how users are engaging with Salesforce. This solution is specifically recommended for tracking usage and adoption metrics, making it a better fit than the other options.
Salesforce Adoption Dashboards on AppExchange
Measuring User Adoption

QUESTION 137
The admin at Cloud Kicks recently implemented Sales Cloud and needs to understand the adoption of Lightning Sales Console.

A. Run the Salesforce Optimizer.
B. Open the Lightning Usage App.
C. Create a custom report.

Correct Answer: B
Section:
Explanation:
The Lightning Usage App in Salesforce provides insights into how users are adopting and using the Lightning Experience, including the Lightning Sales Console. It includes metrics such as daily active users, most visited pages, and feature usage. This tool is specifically designed to help administrators and consultants understand adoption patterns and areas that may need attention or additional training.
Lightning Usage App Overview
Monitor Adoption with the Lightning Usage App

QUESTION 138
Cloud Kicks (CK) has organization-wide defaults set to Public Read-Only for Opportunity. One of the Account Team roles at CK Is Executive Sponsor. Account Team members with the Executive Sponsor rote need Read/Write access to all child Opportunities.
How should the consultant meet the requirement?

A. Create an Opportunity snaring rule to grant Read/ Write access to Opportunities.
B. Create a flow to grant Read/Write access to Opportunities.
C. Create an Account sharing rule to grant Read/Write access to Opportunities.

Correct Answer: A
Section:
Explanation:
To meet the requirement of granting Read/Write access to child Opportunities for Account Team members with the Executive Sponsor role, an Opportunity sharing rule should be created. Sharing rules in Salesforce allow you to automatically extend access to users based on their roles or other criteria. In this case, the sharing rule would be configured to provide Read/Write access to Opportunities for those in the Executive Sponsor role on the Account Team.
Sharing Rules Overview

Create and Edit Sharing Rules

QUESTION 139
Sales managers at Cloud Kicks need to show reports and dashboards with Opportunity Forecast by Product family with team Quotas.
Which solution should a consultant recommend?

A. Create a Joined report with dosed Opportunities, Forecasting Items, and Quotas.
B. Configure Quotas with a Product family report and add necessary fields.
C. Create a custom report type with Forecasting Quotas and Forecasting Items.

Correct Answer: C
Section:
Explanation:
To show reports and dashboards with Opportunity Forecast by Product family with team Quotas, creating a custom report type that includes Forecasting Quotas and Forecasting Items is the recommended solution. This custom report type allows sales managers to generate detailed reports that combine information about forecasted opportunities and the quotas set for the team, providing a comprehensive view of performance by product family.
Custom Report Types
Forecasting in Salesforce

QUESTION 140
Annual sales numbers change depending on renewal periods and new products. Sales managers at Universal Containers (UC) want to emphasize the importance of customer retention when prioritizing the pipeline and customer engagement for the sales team.
Which metric should the consultant recommend to help UC emphasize the importance of customer retention to the overall business strategy?

A. Total pipeline Value
B. Customer Lifetime Value (CLV)
C. Annual Contract Value (ACV)

Correct Answer: B
Section:
Explanation:
Customer Lifetime Value (CLV) is a key metric that helps organizations understand the long-term value of a customer relationship. It emphasizes the importance of customer retention by measuring the total revenue a business can reasonably expect from a single customer account throughout the business relationship. For Universal Containers, focusing on CLV will help sales managers prioritize customer engagement and retention strategies, highlighting the ongoing value of maintaining strong customer relationships over simply acquiring new customers.
Customer Lifetime Value (CLV) in Salesforce
Metrics for Customer Retention

QUESTION 141
The Sales Cloud implementation at Cloud Kicks (CK) is now live. End user training is complete. IT stakeholders have signed off on the technical aspects of the project. The CK admin continues to call the consultant with questions about the sales process.
What should the consultant do?

A. Suggest that CK purchase a support agreement.
B. Conduct a knowledge transfer with the admin.
C. Recommend that the admin attend Salesforce instructor-led training.

Correct Answer: B
Section:

Explanation:
A knowledge transfer is essential to ensure that the Cloud Kicks admin is fully equipped to manage the Sales Cloud implementation post-go-live. This process involves detailed discussions, documentation, and training sessions to cover any gaps in understanding and to ensure the admin can handle day-to-day operations and troubleshoot issues. It also fosters independence and confidence in managing the system.
Knowledge Transfer Best Practices
Salesforce Training and Adoption

QUESTION 142
A consultant has successfully deployed Sales Cloud at Cloud Kicks.
What is the final step in completing an engagement?

A. obtain stakeholder sign-off.
B. Activate users in the system.
C. validate the implementation.

Correct Answer: A
Section:
Explanation:
The final step in completing a Sales Cloud engagement is to obtain stakeholder sign-off. This formal sign-off ensures that all project deliverables have been met to the satisfaction of the stakeholders and that the implementation is considered complete. It is a crucial step to officially close the project and transition to ongoing support and maintenance.
Project Completion and Sign-Off
Ensuring Project Success

QUESTION 143
A consultant is initiating a Sales Cloud project for Cloud Kicks.
Which essential action should the consultant prioritize to ensure successful implementation and adoption?

A. Design end user training plan.
B. Set project milestones and establish key performance indicators (KPIs).
C. Develop Quality Assurance (QA) testing scripts.

Correct Answer: B
Section:
Explanation:
Setting project milestones and establishing key performance indicators (KPIs) is crucial for ensuring successful implementation and adoption of a Sales Cloud project. This approach provides a clear roadmap for the project, helps in tracking progress, ensures accountability, and measures success against defined objectives. Milestones and KPIs guide the project team and stakeholders through the implementation process, ensuring that each phase is completed as planned and that the project's goals are met.
Project Management for Salesforce Implementations
Defining and Measuring KPIs

QUESTION 144
A sales rep at Cloud Kicks must have access to all child accounts of the accounts they own. The organization-wide default setting for Account Is Private.
What happens if a sales rep has access to a parent account?

A. Access to child account records needs to be shared manually.
B. Access to child account records Is granted via the Account Hierarchy.
C. Access to child account records is controlled by default Account Teams.

Correct Answer: A

Section:
Explanation:
In Salesforce, when the organization-wide default (OWD) setting for Account is Private, access to child account records does not automatically inherit from parent account access. Therefore, if a sales rep has access to a parent account, they do not automatically get access to the child accounts. Access to child account records needs to be shared manually through sharing rules, role hierarchy, or manually sharing the records.
Understanding Sharing Settings
Account Hierarchies and Sharing

QUESTION 145
It is challenging for the sales operations team to provide Universal Containers with accurate and insightful reports due to the poor quality and high volume of Account, Contact, and Lead data. As the team performs data cleansing, productivity has been impacted, leading to Inefficiency and low adoption.
What should the consultant do first?

A. Create a data management plan and a data quality dashboard.
B. Install and configure a data cleansing app from AppExchange.
C. Use Duplicate Rules to identify and report data quality issues.

Correct Answer: A
Section:
Explanation:
The first step to addressing poor data quality and high volume issues is to create a data management plan and a data quality dashboard. A data management plan outlines the processes and responsibilities for maintaining data quality, including data cleansing and validation procedures. A data quality dashboard provides visibility into data quality issues, helping the team monitor and address them proactively. This approach helps improve data accuracy and enables the sales operations team to produce more reliable and insightful reports, enhancing overall efficiency and adoption.
Data Quality Management
Creating Data Quality Dashboards

QUESTION 146
The Cloud Kicks global sales team has asked for a simpler way to view and manage its opportunity pipeline. The team is often responsible for hundreds of deals at a time across multiple countries and currencies. The sales reps have suggested using the Kanban view.
What is a consideration when using the Kanban view?

A. It can roll-up summary fields for Currency fields.
B. It can summarize records by Currency fields.
C. It can display up to 10 fields per card.

Correct Answer: B
Section:
Explanation:
The Kanban view in Salesforce is a visual summary of records in a list view. It allows sales teams to manage their opportunity pipeline by providing a column-based layout where each card represents a record. One important consideration when using the Kanban view is that it can summarize records by Currency fields, which is particularly useful for global sales teams dealing with multiple currencies. This feature helps in quickly understanding the distribution and totals of opportunities across different currencies.
Kanban View in Salesforce
Managing Opportunities with Kanban

QUESTION 147
In a recent management meeting, the VP of sales voiced concern over the current economic environment. To better understand the effectiveness of its marketing efforts, the VP expressed a need to monitor and reduce churn going forward.
Which strategy should a consultant recommend to address the VP's concern?

A. Create a Historical Trending report.

B. Create an average stage duration by Opportunity report.
C. Create a year over year sales by Account report.

Correct Answer: A
Section:
Explanation:
To monitor and reduce churn effectively, creating a Historical Trending report is recommended. Historical Trending in Salesforce allows you to track changes over time, providing insights into how different factors are affecting churn rates. This type of report helps in understanding trends in customer behavior and the effectiveness of marketing efforts, enabling the VP of sales to make informed decisions to reduce churn.
Historical Trending Reports
Analyzing Data with Historical Trending

QUESTION 148
A consultant is addressing Cloud Kicks' performance measurement needs and overcoming challenges within Sales Cloud. Which approach should a consultant adopt?

A. Rely on general industry standards to determine performance measurement criteria and system architecture.
B. Collaborate closely with the customer to discern their specific performance measurement requirements.
C. Implement standardized performance measurement practices to ensure consistency across Sales Cloud.

Correct Answer: B
Section:
Explanation:
When addressing performance measurement needs, it is crucial for a consultant to collaborate closely with the customer to understand their specific requirements. Each organization has unique goals, challenges, and metrics that are important to them. By working closely with the customer, the consultant can tailor the performance measurement criteria and system architecture to meet their specific needs, ensuring the implementation is aligned with the customer's business objectives.
Understanding Customer Requirements
Sales Cloud Implementation Best Practices

QUESTION 149
Cloud Kicks has a requirement to measure end user adoption and data quality in Salesforce.
Which solution should the consultant recommend?

A. Einstein Conversation Insight-;
B. tableau custom dashboard
C. Adoption and Data Quality Dashboards Pack
D. Salesforce Surveys

Correct Answer: C
Section:

QUESTION 150
The Universal Containers management team wants to help sales reps determine the nght time to contact prospects.
What should the consultant recommend to meet the requirement?

A. Implement Sales Dialer and begin cold calling leads to request availability.
B. Create a formula field to determine the prospects time zone.
C. Configure Einstein Lead Scoring to determine the best time to make contact.
D. Enable Email Tracking with reporting and activity timeline.

Correct Answer: D
Section:

QUESTION 151
A consultant has successfully deployed Sales Cloud at Cloud Kicks.
What is the final step in completing an engagement?

A. Measure adoption
B. Perform testing
C. Deploy solution
D. Hand over documentation

Correct Answer: A
Section:

QUESTION 152
Cloud Kicks (CK) is migrating Account and Contact information from a legacy CRM system into Salesforce using Data Loader. Accounts in the legacy system have a unique ID field that is used to related Contacts to Accounts in the legacy system, CK wants to automatically match these Contacts to the relevant Accounts when loading Contacts into Salesforce.
What should a consultant recommend to meet the requirement?

A. Create Mater-Detail on Contact.
B. Create Master-Detail on Account.
C. Create External ID on Contact.
D. Create External ID on Account.

Correct Answer: D
Section:

QUESTION 153
Cloud Kicks is in the process of implementing Salesforce for its sales teams. Senior management has concerns about adoption.
What should a consultant recommend to encourage adoption?

A. Establish goals and key metrics.
B. Give users access to a Sandbox environment.
C. Define the sales process.
D. Plan a first release with minimum features

Correct Answer: A
Section:

QUESTION 154
Cloud Kicks (CK) hired a consultant to analyse its Salesforce forecasting configuration end advise CK on how to improve it. The consultant found opportunities in the Value Proposition stage showed up m Collaborative Forecasting inconsistently, which led to inaccurate reporting
What should the consultant recommend to ensure that opportunities show up consistently?

A. Make the Forecast Category a required held.
B. Change the Forecast Report to include Forecast Category.

C. Map opportunity stages to the Forecast Category.
D. Add a validation rule to the Forecast Category.

Correct Answer: C
Section:

QUESTION 155
After a project deployment, several bugs are identified by end users and prioritized by the project team.
What are two ways a consultant should resolve these issues?
Choose 2 answers

A. Build out issue resolution release in the appropriate development sandbox.
B. Build out issue resolution release in the production environment.
C. Perform user acceptance testing (UAT) m the appropriate development sandbox.
D. Perform user acceptance testing (UAT) m a Full sandbox.

Correct Answer: A, D
Section:

QUESTION 156
Universal Containers (UC) does business with a contact associated with a specific account with the contact role of executive. The contact is also on the board of a nonprofit that has requested a charitable donation from UC.
UC wants to track the contact on both accounts.
What is the most efficient solution that the consultant should implement to meet the requirement?

A. Create a new lookup field on the Contact record.
B. Create a new Contact record related to the nonprofit account.
C. Enable the Contact to Multiple Accounts feature.

Correct Answer: C
Section:
Explanation:
The 'Contact to Multiple Accounts' feature in Salesforce allows a single contact to be associated with multiple accounts without the need to duplicate the contact record. This is particularly useful for tracking relationships where a contact has roles in multiple organizations, such as in this scenario where the contact is associated with both a business account and a nonprofit. Enabling this feature provides an efficient solution to manage complex relationships.
Contacts to Multiple Accounts
Enable Contacts to Multiple Accounts

QUESTION 157
Cloud Kicks' (CK) high-value opportunities are delayed in the approval process because sales managers' approval requests go unnoticed for various reasons. CK wants to streamline the approval process and give sales managers more ways to approve opportunities in a timely manner.
Which two strategies should the consultant recommend to improve the approval process?
Choose 2 answers

A. Enable approvals by email for the approval process for high-value opportunities.
B. Allow managers to approve or reject requests via the Approval Requests tab.
C. Build an automation to approve high-value opportunities.
D. Create a dashboard of pending approvals and add it to the Chatter feed.

Correct Answer: A, B
Section: