

## Exam Questions CRT-251

Salesforce Certified Sales Cloud Consultant (SU18)

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#### NEW QUESTION 1

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

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

**Answer:** AC

#### NEW QUESTION 2

Universal Containers uses Products in Salesforce and has a private security model. The product management employees do NOT have access to all opportunities but wants to track the performance of a new product after it is launched. What should a consultant recommend to allow the product management employees to track the performance of the product?

- A. Create a trigger to add the product management team to the sales team of relevant opportunities.
- B. Create a criteria-based sharing rule to add the product management team to relevant opportunities.
- C. Create a trigger to set the product manager as owner for opportunities on the new product.
- D. Create a new product and add it to the price book with the product manager as an owner.

**Answer:** B

#### NEW QUESTION 3

Universal Containers has automated the process of creating new account records in Salesforce. All accounts records created through this process are owned by a generic user. There are now two million account records that have been created in this manner. Universal Containers is now seeing performance issues when it makes any changes to account sharing rules.

What can Universal Containers do to address the issue without changing its integration?

- A. Set the organization-wide defaults for accounts to public read/write.
- B. Contact Salesforce support to add an index to the account object.
- C. Ensure that the generic user has the Modify All Data permission.
- D. Ensure that the generic user has NOT been assigned to a role.

**Answer:** D

#### NEW QUESTION 4

Universal Containers is planning to implement Salesforce Sales Cloud to support its professional services division. The Universal Containers sales team wants to easily see customer purchasing activity on account, contact, and contact detail pages.

What should a consultant recommend to meet this requirement?

- A. Enable Salesforce Console for Sales to see customer purchasing activity.
- B. Create a global publisher action to view all customer purchasing activity.
- C. Enable the Orders object in Salesforce to track customer purchases.
- D. Create a custom object related to the account, contact, and contract objects.

**Answer:** C

#### NEW QUESTION 5

Universal Containers supports two lines of business: shipping and freight. The sales cycle for freight deals is more complex and involves more stages than the shipping sales cycle.

Which solution should a consultant recommend to meet these business requirements?

- A. Create different record types and sales processes for each line of business, and assign different stages to each page layout.
- B. Create different record types and sales processes for each line of business, and use workflow field updates to assign stages.
- C. Create different record types and sales processes for each line of business, and assign different page layouts to each record type.
- D. Create different record types and sales processes for each line of business, and assign different sales processes to each page layout.

**Answer:** C

#### NEW QUESTION 6

Which three considerations should be addressed when implementing Advanced Currency Management? (Choose three.)

- A. Currency roll-up summary fields from opportunities to an account use the static conversion rate.
- B. Currency roll-up summary fields from opportunity products to an opportunity use the dated exchange rate.
- C. The converted amount of an opportunity uses dated exchange rates based on the close date of the opportunity.
- D. Advanced Currency Management can be enabled or disabled in the organization under the company profile, if needed.
- E. Advanced Currency Management dated exchange rate are automatically updates in a monthly basis.

**Answer:** BCD

#### NEW QUESTION 7

Universal Containers uses a custom object named "Analysis", which is the child in a master-detail relationship with the Opportunity object. Sales teams use this object to create requests for supporting research. Sales teams use the Salesforce Mobile App and want to easily create new Analysis records from their phones.



What should a consultant recommend to meet this requirement?

- A. Create a Visualforce page.
- B. Create an Action.
- C. Create a related list button.
- D. Create a custom object tab.

**Answer: D**

#### NEW QUESTION 8

Universal Containers has a private sharing model for accounts and opportunities. Each sales representative is assigned to work with a desiccated sales engineer. The sales engineer will need access to their assigned sales representatives' accounts and opportunities.

What should a consultant recommend to meet this requirement?

- A. Have the sales representatives manually share the accounts and opportunities with their assigned sales engineers.
- B. Create criteria-based sharing rules to share the accounts and opportunities with sales engineer.
- C. Enable account teams selling and have each sales representative configure their default teams.
- D. Create a trigger to add the sales engineers to their sales representatives' account and opportunity teams.

**Answer: C**

#### NEW QUESTION 9

Universal Containers is preparing for the launch of its new Sales Cloud implementation to a global user base. With previous sales automation applications, the company had slow adoption of the new solution. Which three Sales Cloud deployment factors should be considered to help ensure adoption? Choose three answers.

- A. Type of training delivered
- B. Sales rep quota targets
- C. Management communications
- D. Maintenance release schedule
- E. Training in local language

**Answer: ACE**

#### NEW QUESTION 10

What are two capabilities of Data Loader? Choose two answers.

- A. Ability to extract organization and configuration data.
- B. Ability to prevent importing duplicate records.
- C. Ability to export field history data
- D. Ability to run one-time or scheduled data loads

**Answer: CD**

#### NEW QUESTION 10

Universal Containers needs to show a dashboard with forecast by product family with quotas. Which solution should a consultant recommend?

- A. Build a joined report with closed opportunities, forecasting items, and quotas.
- B. Customize quotas with product report, and add necessary fields.
- C. Build a custom report type with forecasting quotas and forecasting items.
- D. Create an analytic snapshot to capture the opportunity forecast.

**Answer: D**

#### NEW QUESTION 12

Universal Containers has enables Advanced Currency Management.

How is the converted amount data reported on a report that spans time periods when the exchange rate was different?

- A. Converted amounts are based on exchange rates that use the oldest entry.
- B. Converted amounts are based on the exchange rates entered in the opportunity.
- C. Converted amounts are based on exchange rates that use the current entry.
- D. Converted amounts are based on the historical exchange rate associated with the close date.

**Answer: D**

#### NEW QUESTION 14

Universal Containers wants to prevent sales users from modifying certain opportunity fields when the sales stage has reached Negotiation/Review. However, sales directors must be able to edit these opportunity fields in case last minute updates are required.

Which solution should a consultant recommend?

- A. Modify the profile for sales directors to enable the "Modify All" object permission for opportunities.
- B. Change the field-level security for sales representatives to restrict field access based on the sales stage.
- C. Create a validation rule to enforce field access based on the sales stage and a custom permission.
- D. Create a workflow rule to enable field access for sales directors based on the sales stage.

**Answer: C**



#### NEW QUESTION 18

Resellers for Universal Containers need access to reports in the Partner Communities to help manage their opportunities. How should Salesforce be configured to give resellers the correct level of access to reports?

- A. Create the appropriate list views and report folders in the Partner Communities for all partner users.
- B. Create a new tab in the Partner Communities to display the appropriate list views and report folders.
- C. Create a Chatter group that allows partners to post links to appropriate list views and reports.
- D. Create the appropriate list views and report folders, and share with all partner users.

**Answer:** D

#### NEW QUESTION 20

Universal Containers is devising a separate sales methodology to upsell service contracts to its existing customer base. The company wants to track and report on these deals separately from other deals.

What should a consultant recommend to meet this requirement?

- A. Create a custom field on opportunity to flag and report on these sales.
- B. Create an opportunity record type and sales process for reporting on these deals.
- C. Create a separate page layout and report to flag and report on these deals.
- D. Add “upsell” as a stage and create a summary by opportunity stage.

**Answer:** B

#### NEW QUESTION 25

Universal Containers has set up a sales process that requires opportunities to have associated product line items before moving to the negotiation stage.

Which two solutions should a consultant recommend to meet this requirement? Choose two answers.

- A. Configure a validation rule that tests the Has Line Item and Stage fields for the correct condition.
- B. Configure the opportunity record types to enforce product line item entry before selecting the negotiation stage.
- C. Ensure that all sales representatives have access to at least one PriceBook when creating product lines.
- D. Define a workflow rule that automatically defaults to a PriceBook and product line item when selecting the negotiation stage.

**Answer:** AC

#### NEW QUESTION 29

A premier customer for Universal Containers needs access to confidential product roadmap information. Which two steps should a sales representative take to securely send this information using content delivery?

Choose two answers.

- A. Remove access to content after a specified date.
- B. Require the customer to enter a password to view the content.
- C. Require the customer to enter a security token to download the content.
- D. Require the recipient to log into Salesforce to access the content.

**Answer:** AB

#### NEW QUESTION 30

Universal Containers has a private sharing model and wants the ability to share documents related to an opportunity, such as contracts and proposals, with the field sales team.

How can the documents be shared efficiently and securely?

- A. The documents should be uploaded to Salesforce Files and shared with the field sales organization.
- B. The documents should be emailed to the sales team on the opportunity record.
- C. The documents should be uploaded to Salesforce Files from the opportunity record.
- D. The documents should be uploaded to a library that is shared with the field sales organization.

**Answer:** A

#### NEW QUESTION 31

Universal Containers has configured a private sharing model with opportunity team selling enabled. The company allows its sales representatives to add sales team members to their opportunities when necessary. As a result, each sales representative has opportunities they directly manage and opportunities on which they collaborate with other sales representatives. Which data set filter report would allow the sales representatives to see all opportunities they are involved with?

- A. My team-selling and my opportunities
- B. My team-selling shared opportunities
- C. My team's opportunities
- D. My collaborative opportunities

**Answer:** A

#### NEW QUESTION 34

Universal Containers is moving from a legacy customer relationship management (CRM) system to Salesforce Sales Cloud. What should a consultant recommend to ensure a successful implementation?

- A. Review the current system with all levels of users to understand their requirements.
- B. Review the current system with executive management to understand their requirements.
- C. Review the current system with IT management to understand their requirements.



D. Review the current system and configure Sales Cloud to work in the same way.

**Answer:** A

#### NEW QUESTION 35

Universal Containers has its sales representatives enter a new lead whenever they are prospecting a new customer. After qualifying the new lead, a new opportunity must be created to track the deal.

Which three actions should a consultant recommend to enforce data quality and accuracy? (Choose three.)

- A. Enable validation rules on the opportunity.
- B. Map custom lead fields to corresponding custom opportunity fields.
- C. Create an Apex trigger to perform data quality checks.
- D. Enable validation rules on the lead.
- E. Enable the lead conversion permission.

**Answer:** BDE

#### NEW QUESTION 39

A marketing department that runs many concurrent campaigns has specified that the influence timeframe for a campaign is 60 days. What is the impact on the campaign influence for opportunities when a contact is associated to an opportunity in a contact role?

- A. Campaigns in which a contact became a member within the last 60 days will be associated and displayed in Campaigns with Influenced Opportunities Report.
- B. All contacts associated with campaigns will be added to the campaign influence related list.
- C. Sales reps can choose which campaigns created within the last 60 days should be added to the campaign influence related list.
- D. All campaigns created within the last 60 days will be added to the campaign influence related list.

**Answer:** A

#### NEW QUESTION 42

A lead sharing rule has been defined so that leads owned by the record owner are shared with the public group called "Sales Team."

Who will have access to these records, assuming that a private sharing model is in place on these objects and there are no sharing rules defined for those objects, when the lead is converted to an account, contact, and opportunity?

- A. The record owner will be the only person who is able to access the account, contact, and opportunity records.
- B. The record owner, all members of the public group, and a group called "Sales team" will be able to access the three records.
- C. The record owner and anyone above the record owner in the role hierarchy will be able to access the three records.
- D. The record owner, all members of the public group, and a group called "Sales team", and anyone above any group member in the role hierarchy will be able to access the three records.

**Answer:** C

#### NEW QUESTION 46

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

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

**Answer:** D

#### NEW QUESTION 48

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