



# **Salesforce**

## **Exam Questions CRT-251**

Salesforce Certified Sales Cloud Consultant (SU18)

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#### NEW QUESTION 1

The Universal Containers sales team wants to track product shipments for each of its customers. The shipment tracking information is currently available in a back-end system, which the company plans to integrate with Salesforce. Which set of objects are relevant for this integration?

- A. Opportunity, opportunity product, campaign, custom object-shipment status
- B. Opportunity, opportunity product, custom object-shipment status
- C. Lead, account, opportunity product, custom object-shipment status
- D. Lead, opportunity, product, custom object-shipment status

**Answer: B**

#### NEW QUESTION 2

Universal Containers wants to measure revenue based on when individual Products are sold. What should a Consultant implement to meet this requirement?

- A. Forecasting by Order Amount
- B. Forecasting by Opportunity Amount
- C. Forecasting by Product Dates
- D. Forecasting by Schedule Date

**Answer: B**

#### NEW QUESTION 3

Universal Containers does NOT have a direct sales team; its channel partners are responsible for selling and servicing products. Over the past quarter, there has been an increased volume of leads. However, the Vice President of Channels has been receiving many complaints from partners on the poor quality of the leads and has noticed a significant drop in the lead conversion rate. What should a consultant recommend to improve partner satisfaction with the leads being shared?

- A. Assign all leads to the partner channel manager to validate the lead data and manually assign to partners.
- B. Create multiple validation rules to ensure that all fields on the lead record are populated with data.
- C. Create a custom lead score field to assess lead quality and assign the leads that exceed this score to partners.
- D. Use the lead score on the Find Duplicates button and assign the leads with a score in the high category.

**Answer: C**

#### NEW QUESTION 4

Universal Containers wants to capture business sector information on a lead and display the information on the account and contact once the lead has been converted. How can these requirements be met?

- A. Create a custom field on the Lead, Account, and Contact objects and configure mapping of these two fields for conversion.
- B. Use a trigger to update the Contact field with the Account value.
- C. Create a custom field on the Lead and Account object.
- D. Create a custom formula field on the Contact object to pull the value from the Account object.
- E. Create a custom field on the Lead and Account objects and configure mapping of these two fields for conversion.
- F. Create a custom formula field on the Contact object to pull value from the Account object.
- G. Create a custom field on the Lead and Account objects and configure mapping of these two fields for conversion.
- H. Create a custom formula field on the Account object to pull value from the Contact object.

**Answer: C**

#### NEW QUESTION 5

The sales representatives at Universal Containers use various email applications and often receive important customer emails when they are away from the office. Sales management wants to ensure sales representatives are recording email activity with customers in Salesforce while they are away from the office. Which solution should a consultant recommend to meet this requirement?

- A. Download and install a Salesforce universal connector for their smartphones and computers.
- B. Download and install the Salesforce for Outlook connector on their smartphones and computers.
- C. Forward emails using their Email-to-Salesforce email address from their smartphones and computers.
- D. Copy and paste emails manually to the customer record in Salesforce from their smartphones and computers.

**Answer: C**

#### NEW QUESTION 6

The marketing department at Universal Containers is migrating from its legacy campaign and email management system to Salesforce and wants to ensure that its communication materials can be migrated as well. What should a consultant recommend to migrate the marketing department's email templates?

- A. Enable Email-to-Click and use the Import Wizard.
- B. Create an email template change set or use the Lightning Platform.
- C. Manually recreate the email and mail merge templates in Salesforce.
- D. Enable Email to Salesforce before sending email templates to Salesforce.

**Answer: C**

#### NEW QUESTION 7

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 8

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 9

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

What should a consultant recommend to meet this requirement?

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

**Answer:** C

#### NEW QUESTION 10

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 sells two product lines that each use a distinct selling methodology. Additionally, each product line captures different information that is used to sell the products.

What should a consultant recommend to support selling the two product lines?

- A. Create one page layout, two sales processes, and validation rules to capture relevant opportunity information.
- B. Create two page layouts, one opportunity record type, and one workflow rule to assign the correct page layout to the record type.
- C. Create two sales processes and two page layouts; assign them to two different opportunity record types for each product line.
- D. Create two page layouts and two sales processes; assign them to the respective product lines to collect relevant information.

**Answer:** C

#### NEW QUESTION 15

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 16

Universal Containers sells three unique products and each product has its own sales process. The company qualifies prospects for the three products in a consistent manner; however, once the customer has shown interest, the sales representatives must follow the relevant product's sales process.

Which two solutions should a consultant recommend to meet these requirements? Choose two answers.

- A. Configure opportunity record types for each sales process.
- B. Create sales stages that align with opportunity record types.
- C. Define sales processes to map to each opportunity record type.
- D. Define the default opportunity teams for each opportunity record type.

**Answer:** BC

#### NEW QUESTION 19

Universal Containers has a large sales department that is dispersed worldwide. Sales managers want greater visibility into the opportunities in progress with their respective teams and want to receive email notifications when opportunities reach key metrics ( e.g. progress to a certain stage or reach a specific probability). However, individuals want to control the frequency of their email notifications. Which two solutions should a consultant recommend? Choose two answers.

- A. Configure the individual Salesforce for Outlook email settings to control notification frequency.
- B. Configure Chatter Feed Tracking to provide updates for the key metrics the sales managers are looking for.
- C. Create a report filtering for the desired criteria and individuals subscribe to the report.
- D. Define a workflow rule and email task that is triggered when key fields are updated to new values.

**Answer:** BC

#### NEW QUESTION 20

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 21

Universal Containers requires its sales representatives to go through an internal certification process to sell certain groups of products. Which two actions prevent a sales representative from adding these products to opportunities if they are NOT certified to sell them? Choose two answers.

- A. Use a validation rule on opportunity products to prevent them from adding products marked as required certification if they are NOT certified.
- B. Use a validation rule on products marked as requiring certification to prevent them from being added to an opportunity.
- C. Use a criteria-based sharing rule on products marked as requiring certification to only share the products to users who are certified.
- D. Use a separate price book for the products requiring certification and only share the price book to users who are certified.

**Answer:** AD

#### NEW QUESTION 23

Sales management at Universal Containers is concerned that pipeline and forecasting reports are inaccurate because sales representatives are creating opportunities after they are closed/won. Which two solutions will help sales management identify and address the issue? Choose two answers.

- A. Run the opportunity pipeline standard report to view the upcoming opportunities by stage.
- B. Use a workflow rule to email sales management when the opportunity is created in the closed/won stage.
- C. Create a report that displays opportunities that have a closed date less than or equal to the created date.
- D. Create a workflow rule that automatically updates the opportunity to the first stage in the sales process.

**Answer:** BC

#### NEW QUESTION 25

Universal Containers wants to implement a website for a new product launch. The site should be publicly available, allow visitors to submit requests for information, and be managed by the non-technical marketing team. Which solution should the consultant recommend?

- A. Lightning Platform
- B. Salesforce Mobile Sites
- C. Lightning Components
- D. Customer Community

**Answer:** D

#### NEW QUESTION 26

Which two actions can a consultant take during the project planning phase to ensure client stakeholder goals are met? (Choose two.)

- A. Create scheduled dashboard to be sent weekly to all stakeholders.
- B. Ensure the project key performance indicators are profitable.
- C. Acquire the client stakeholder's key performance indicators.
- D. Establish a stakeholder committee and meeting schedule.

**Answer:** CD

#### NEW QUESTION 30

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 33

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 36

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 40

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 42

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 46

The management at Universal Containers noticed the lead conversion ratio has remained the same for the hospitality industry despite an increase in lead creation. Which reporting tool can help determine the issue?

- A. Report on leads by source
- B. Campaign dashboard by industry
- C. Report on lead lifetime by industry
- D. Industry performance dashboard

**Answer:** C

#### NEW QUESTION 48

Universal Containers wants to improve the accuracy of its current sales forecast. It also wants to improve the relevance of its sales stages and the role they play in the sales process.

How should the relationship between the various elements of the sales process be defined to meet these requirements?

- A. Map sales probability values to forecast categories; assign sales stages accurate percentages.
- B. Map forecast probability to opportunity probability; assign appropriate sales stage.
- C. Map appropriate sales stage to opportunity stage; assign accurate forecast probability.
- D. Map opportunity stages to forecast categories; assign accurate probability to each stage.

**Answer:** D

#### NEW QUESTION 50

The shipping department at Universal Containers is responsible for sending product samples as part of the sales process. When an opportunity moves to the “sampling” stage, Universal Containers wants an automatic email sent to the shipping department listing the products on the opportunity. How can this



requirement be met using a workflow email?

- A. Create is on the opportunity product using an HTML email template.
- B. Create is on the opportunity using a Visualforce email template.
- C. Create is on the opportunity product using a Visualforce email template.
- D. Create is on the opportunity using an HTML email template.

**Answer:** B

#### NEW QUESTION 53

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 56

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 61

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

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

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

**Answer:** C

#### NEW QUESTION 66

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