

CRT-251 Dumps

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 sells products that require frequent collaboration with the same team of individuals who play a key role in closing deals. The lead sales representative determines the level of access for each of the collaborating team members on an opportunity. Which solution should a consultant recommend to facilitate the collaboration of the lead sales representative and team members?

- A. Create public groups for extended team members and allow the sales representative to assign manual sharing on their opportunities.
- B. Define a sharing rule for each lead sales representative to assign appropriate access for all extended team members.
- C. Configure default opportunity teams for all lead sales representatives with team selling enabled.
- D. Enable Chatter to have the lead sales representative facilitate collaboration through sales team swarming.

Answer: C

NEW QUESTION 3

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 field for conversio
- 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 conversio
- F. Create a custom formula field on the Contact object to pull value form the Account object.
- G. Create a custom field on the Lead and Account objects and configure mapping of these two fields for conversio
- H. Create a custom formula field on the Account object to pull value form the Contact object.

Answer: C

NEW QUESTION 4

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-Close 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 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

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 7

Universal Containers uses a seven-step selling methodology. Each sales stage corresponds with a step in the methodology. The first stage is a preliminary qualification step, and opportunities in this stage should NOT contribute to the forecast. Which two actions should a consultant recommend to meet these requirements? Choose two answers.

- A. Instruct sales users to enter 0\$ for the opportunity amount.
- B. Configure the first stage with the omitted forecast category.
- C. Override the forecast to be 0\$ for first stage opportunities.
- D. Assign 0% probability to the first sales stage.

Answer: BD

NEW QUESTION 8

Universal Containers has a public sharing model for accounts and uses the parent account field to create a multi-level account hierarchy. When viewing a parent account, the company wants to see the total value of open opportunities for all accounts in the hierarchy. Which solution should a consultant recommend to meet this requirement?

- A. Use Apex to update a custom field on the parent account with the total value of open opportunities from the child accounts.
- B. Create a roll-up summary field on the parent account showing the total value of open opportunities from the child accounts.
- C. Define a workflow rule to update the custom field on the parent account with the total value of open opportunities from the child accounts.
- D. Create a link on the account that opens a report showing the total value of open opportunities for all accounts in the hierarchy.

Answer: A

NEW QUESTION 9

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 10

Universal Containers has enabled Social Accounts and Contacts. When a sales representative accesses a contact within Salesforce, the representative is unable to see detailed information from the contact's social profiles. What is preventing the sales representative from accessing this information?

- A. The fields configured by Universal Container's administrator on the contact page layout are missing.
- B. The information shown is based on the sales representative's social connection with the contact.
- C. The link to the Facebook profile is NOT configured with the administrator password to access detailed information.
- D. Universal Containers must install and APP Exchange package to access public profile information for its users.

Answer: B

NEW QUESTION 10

Universal Containers allows its sales representatives to negotiate up to a 5% discount for their opportunities. Discounts greater than 5% must be sent to their Regional Sales Manager (RSM) to approval. Discounts greater than 15% must also be sent to the Regional Vice President (RVP) for approval. Which approach would satisfy these requirements?

- A. Configure an approval process for the RSM and a workflow rule for the RVP.
- B. Create two approval processes, one for the RSM and one for the RVP.
- C. Create the two-step approval process for the RSM and RVP as approvers.
- D. Configure a workflow approval task and email to notify the RSM and RVP.

Answer: C

NEW QUESTION 14

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 17

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 22

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 25

What is the recommended approach to relate a Person Account to another Account?

- A. Add the Person Account to the Contact Roles.
- B. Add the Person Account to the Account owner's default team.
- C. Add the Person Account to the Partners Related List.
- D. Add the Person Account to the Account Team.

Answer: C

NEW QUESTION 29

Universal Containers' management wants to see forecast numbers by all sales representatives and by multiple product groups.

Which two actions should a consultant recommend to meet these requirements? (Choose two.)

- A. Implement Collaborative Forecasting with product family.
- B. Build a custom forecast report showing product groups.
- C. Build a forecast list view by product family group.
- D. Implement Collaborative Forecasting with quota attainment.

Answer: AD

NEW QUESTION 33

Universal Containers wants to track the campaigns that influence won opportunities.

Which two actions should a consultant recommend to meet this requirement using standard functionality? Choose two answers.

- A. Have the administrator specify a timeframe that limits the time a campaign can influence an opportunity after the campaign first associated date and before the opportunity created date.
- B. Automatically add child campaigns of the primary campaign source if the child campaigns have an end date that fails before the opportunity close date.
- C. Add campaigns to opportunities when the campaign is related to a contact that is assigned a contact role on the opportunity prior to the close date.
- D. Have representatives populate a field on the opportunity record with the dollar amount of the expected revenue from the campaigns that influenced the opportunity.

Answer: AC

NEW QUESTION 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 36

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 40

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