



Salesforce

Exam Questions Sales-Cloud-Consultant

Certified Salesforce Sales Cloud Consultant

NEW QUESTION 1

Up to this point, two sales have had separate accounts and opportunities. Sales Rep A wants to include Sales Rep B in a few opportunities on one account. Which two actions can Sales Rep A allow Sales Rep B to do when Account Teams are enabled and used for this account? Choose 2 answers

- A. Grant Read access on the account's cases.
- B. Edit all opportunities on the account.
- C. View the account and keep activities private.
- D. View one of the opportunities on the account.

Answer: AB

NEW QUESTION 2

A consultant has completed the Build and Validate phases of a Sales Cloud implementation at Cloud Kicks. Which step should the consultant complete next?

- A. Upgrade to the latest Salesforce Release.
- B. Sign off on the statement of work.
- C. Deliver training.
- D. Complete a post-mortem.

Answer: C

NEW QUESTION 3

Each product engineer at Cloud Kicks supports 3 specific product lines. There are three product lines. Sales reps sell all the company's product lines; Sales management wants the appropriate product engineer automatically assigned to any new Opportunity for their product line with Read-Only rights. What are two actions the consultant can take to meet the requirement? Choose 2 answers

- A. Manually assign a product-specific role to each product engineer.
- B. Create criteria-based opportunity sharing rules for each product line.
- C. Enable Default Opportunity Teams for the Opportunity.
- D. Enable Default Account Teams for each product line.

Answer: AB

Explanation:

* A. Create criteria-based opportunity sharing rules for each product line. This allows you to specify criteria for sharing an Opportunity with a specific user or group of users. For example, you could create a rule that shares an Opportunity with the product engineer when the Opportunity has a certain product line assigned to it.
B. Enable Default Opportunity Teams for the Opportunity. This allows you to set a default Opportunity Team for an Opportunity, which will automatically assign the product engineer to the Opportunity when it is created. This is useful when you need to assign a specific user to multiple Opportunities.

NEW QUESTION 4

Cloud Kicks has hired a consultant to help with its initial Salesforce implementation.

Which three steps should the consultant take to help Cloud Kicks get Salesforce up and running? Choose 3 answers

- A. Define company vision.
- B. Finalize integrations.
- C. Prioritize goals.
- D. Define KPIs.
- E. Analyze competitors.

Answer: ACD

NEW QUESTION 5

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

Answer: A

NEW QUESTION 6

Cloud Kicks is preparing to deploy its configurations. The chosen release date is during a Salesforce Release window. The current configuration is in Non-Preview Sandbox. Which two strategies should a consultant recommend?
Choose 2 answers

- A. Deploy before the Salesforce Release
- B. Test new configurations in a Non-preview Sandbox
- C. Deploy after the Salesforce Release.
- D. Test new configurations in a Preview Sandbox.

Answer: CD

NEW QUESTION 7

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.

Answer: C

NEW QUESTION 8

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.

Answer: BD

NEW QUESTION 9

Cloud Kicks is expanding its operations to Europe. The company wants to enable able Advanced Currency Management to support both EUR and USD currencies, and show the total values of open opportunities on account records.

How should the consultant implement a solution to meet the requirement?

- A. Use a custom summary formula field on the Opportunity.
- B. Install a third-party app from the AppExchange.
- C. Use a Roll-up Summary field from the Opportunity to the Account.
- D. Create a cross-object formula field on the Account.

Answer: B

NEW QUESTION 10

Cloud Kicks' (CK) VP of technology wants to start using Salesforce for all the sales team's automation. CK migrated 70 million records from a legacy database to the datawarehouse that will be synced with Salesforce. CK wants to search and cross-reference records with the original source database. What should a consultant recommend meeting this requirement?

- A. Use the standard External ID field and map this to the source record ID value.
- B. Use a custom External ID field and map this to the source record ID value.
- C. Use the standard External ID field and map this to the Salesforce record ID value.
- D. Use a custom field named External ID and map this to the Salesforce record ID value.

Answer: B

NEW QUESTION 10

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.

Answer: B

NEW QUESTION 13

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.

Answer: B

NEW QUESTION 16

Universal Containers is analyzing data to identify gaps, and wants to know which Accounts with ...opportunities are missing Contacts.

Which feature should a consultant recommend to build this report?

- A. Custom report type
- B. Joined report

- C. Cross filter
- D. Custom filter

Answer: C

NEW QUESTION 17

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

Answer: BD

NEW QUESTION 18

A consultant for Cloud Kicks notices that the deploy date for the Sales Cloud project is also the same weekend as a Salesforce Release. What should the consultant recommend?

- A. Continue the planned deployment concurrent with the Salesforce Release.
- B. Update the project plan for the following week and communicate the change.
- C. Inform Cloud Kicks about the Salesforce Release and that the project may take longer.
- D. Stop all work because the impact of the Salesforce Release is unknown.

Answer: B

NEW QUESTION 22

Universal Containers has four product lines, each with its unique sales cycle. Once the prospect is qualified, the sales reps should follow the product-specific sales cycle. Which two actions should a consultant recommend to meet these requirements? Choose 2 answers

- A. Implement sales processes that map to each Opportunity record type.
- B. Create Opportunity record types for each product line.

Answer: AB

NEW QUESTION 25

Sales reps at Cloud Kicks are responsible for creating leads manually and entering relevant details. The marketing department has noticed that some leads are missing important information. What are two functionalities the consultant should apply to ensure that key fields are populated?
Choose 2 answers

- A. An assignment rules
- B. A flow
- C. A required field
- D. A validation rules

Answer: CD

NEW QUESTION 27

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

Answer: ABC

NEW QUESTION 32

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

Answer: D

NEW QUESTION 36

The Cloud Kicks sales team collaborates on opportunities which help them close more deals. What should the consultant configure to allow contributing sales team members to share in the revenue from closed opportunities?

- A. Enable Opportunity Splits from Setup.
- B. Add the Opportunities to a Campaign
- C. Add the contributors to the Opportunity's Contact role related list.
- D. Create Quick Actions to create child Opportunities.

Answer: A

NEW QUESTION 39

Cloud Kicks wants to enable representatives to view the individual team member's split percentage, where the split percentage is less than 100% of the revenue amount.

Which attribution method should the consultant recommend?

- A. Opportunity Percent field
- B. Opportunity Overlay Split
- C. Opportunity Currency field
- D. Opportunity Revenue Split

Answer: A

NEW QUESTION 44

A consultant has been tasked with analyzing the way sales reps use Salesforce to work a deal from inception to close, and then presenting this information to management.

What should the consultant utilize to present the information?

- A. Sales Architecture Map
- B. Business Process Map
- C. System Landscape Diagram
- D. Entity Relationship Diagram

Answer: B

Explanation:

The best way for the consultant to present the information about how sales reps use Salesforce to work a deal is to utilize a Business Process Map. This map will provide an overview of the process, and can be used to explain how each step of the process works. Additionally, a Business Process Map can also be used to identify areas of optimization and improvement, as well as to document any changes that need to be made. A Sales Architecture Map, System Landscape Diagram, and Entity Relationship Diagram are not suitable for this purpose.

NEW QUESTION 46

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.

Answer: C

NEW QUESTION 47

Universal Containers' sales operations team needs to provide visibility on sales pipeline changes on a monthly basis.

How should the consultant meet this requirement?

- A. Create an Opportunity History report for open pipeline Opportunities in a given date range.
- B. Create a custom pipeline date range field and display it on the Forecasting tab.
- C. Create a sales pipeline dashboard that includes filters for Opportunity date ranges.
- D. Create training on how to use date filters on reports to compare pipeline for different date ranges.

Answer: C

NEW QUESTION 52

The VP of sales at Good Kicks wants to know the percentage of opportunities in a certain stage that were eventually closed won.

Which two steps should a consultant take to create a solution? Choose 2 answers

- A. Enable Feed Tracking.
- B. Create a roll-up summary formula.
- C. Update a custom field using automation.
- D. Create a report and dashboard.

Answer: BD

NEW QUESTION 54

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.

Answer: B

NEW QUESTION 56

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

Answer: ABE

NEW QUESTION 60

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.

Answer: CD

NEW QUESTION 65

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

Answer: B

NEW QUESTION 70

The sales team at Cloud Kicks has been late meeting deadlines on a specific project and has missed multiple project meetings.

What should the consultant recommend to the project manager?

- A. Revisit the communication plan and set up more frequent touch points with the customer.
- B. Setup a requirements workshop and get sign-off.
- C. Write a solution design and get sign-off so the build phase can start.
- D. Ask what the customer would like the solution to be and demo it to them at the end of the build phase.

Answer: A

NEW QUESTION 74

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.

Answer: B

NEW QUESTION 77

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.

Answer: AB

NEW QUESTION 80

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.

Answer: A

NEW QUESTION 81

Universal Containers wants to divide the revenue of the closed Opportunities between sales reps that worked on the deal. Additionally, on some deals, the sales reps work with technical sales managers and want a way to credit them for their support.

How should the consultant meet this requirement?

- A. Enable Opportunity Teams and ask Opportunity owners to add technical sales managers.
- B. Use adjustments in Collaborative Forecasting to attribute Opportunity revenue to each technical sales manager
- C. Enable Opportunity splits, revenue splits for sales reps, and overlay splits for technical sales managers.
- D. Create 2 formula field on the Opportunity to track revenue attributed to technical sales managers.

Answer: D

NEW QUESTION 84

Cloud Kicks wants to release product enhancements effectively to drive user adoption mtd have the impact on the organization and users' day-to-day functions.

What are three steps for successful change and seasonal release management? Choose 3 answers

- A. Prioritize executive requests.
- B. Train end users after deployment.
- C. Communicate updates to end user.
- D. Create an org development model.
- E. Collect input from stakeholders.

Answer: ACD

NEW QUESTION 86

The enterprise architect for cloud Kicks wants to understand how objects in sales cloud are connected to one another.

Which two approaches should a consultant use to help the architect? Choose 2 answers

- A. Explain the types of object relationships in Salesforce
- B. Review the Object Manager tab in Setup with the customer.
- C. Use Schema Builder to show a visual of related objects.
- D. Obtain an export of object data from the current system.

Answer: AB

NEW QUESTION 87

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.

Answer: C

NEW QUESTION 91

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.

Answer: B

NEW QUESTION 96

A customer notices a large increase in leads created overnight which exceed the daily limits. Upon examination, the leads appear to be created by bots. The

Customer uses a standard web-to-lead form without safeguards in place to limit spam on forms. What should the consultant recommend as the first line of defense before republishing the form?

- A. Select Require reCAPTCHA Verification in Web-to-Lead settings
- B. Use a custom Web-to-Lead alternative with built-in protection.
- C. Use an AppExchange package to add a honeypot field.
- D. Engage the web services team to write custom CSS for the form.

Answer: A

NEW QUESTION 98

Cloud Kicks is expanding to international markets. Sales reps are unable to find specific products in the international price book. Which two steps should the consultant take to resolve this issue? Choose 2 answers

- A. Add the products to a product family.
- B. Activate the products
- C. Add the products to the price book.
- D. Share the products with sales reps.

Answer: BC

NEW QUESTION 101

The sales director at Cloud Kicks wants to prevent users from viewing each other's Opportunities but wants them to check to see that the Account already exists prior to creating a new Account. Which organization-wide default should the consultant recommend?

- A. Set Account to Public Read Only and use a criteria-based sharing rule on Opportunity.
- B. Set Account and Opportunity to Public Read Only.
- C. Set Account to Public Read Only, and Opportunity to Private.
- D. Set Account and Opportunity to Private.

Answer: C

NEW QUESTION 103

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.

Answer: BDE

NEW QUESTION 105

The Cloud Kicks global sales teams are distributed across regions. Sales leadership wants to give access to dashboards based on region. For example, users within the region should have access to regional dashboards while the leadership team should have access to global dashboards. What should the consultant recommend meeting this requirement?

- A. Create Dashboard folders for each regional sales team and one Dashboard folder for the leadership and team.
- B. Create one Dashboard folder for all regional sales teams and one Dashboard folder for the leadership team.
- C. Create one Dashboard folder for all regions for sales and leadership teams with View access.
- D. Create region-based sales groups, one leadership group, and one Dashboard folder with View access.

Answer: A

NEW QUESTION 108

Prospects at Cloud Kicks are exposed to many different marketing activities. In most cases, a combination of several different activities result in a successful sale. How should the consultant configure Salesforce to track which marketing activities influenced the customer to make a purchase?

- A. Implement Customizable Campaign Influence.
- B. Create a junction object between Campaign and Opportunity.
- C. Use Surveys to request the information from the customer.
- D. Make the Primary Campaign Source required.

Answer: B

Explanation:

Creating a junction object between Campaign and Opportunity is the best way to track which marketing activities influenced a customer to make a purchase. This junction object will allow you to track the influence of multiple Campaigns on a single Opportunity, which can be used to gain insights into which Campaigns are most effective.

NEW QUESTION 113

Universal Containers compensates its sales team based on their achievement of the company's sales revenue goals. The sales ops team needs to track the sales reps' performance against these goals. How should the consultant meet the requirement?

- A. Construct Opportunity Reports with custom formulas to show attainment.

- B. Build automation to aggregate and report on revenue attainment from the User object.
- C. Configure custom objects and use automation to calculate and stone attainment.
- D. Configure sales quotas and compare quota attainment on the forecast.

Answer: D

NEW QUESTION 115

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.

Answer: AB

NEW QUESTION 117

Cloud Kicks wants to implement team selling to share differing levels of access to Accounts and associate records, such as opportunities, contracts, and case, based on team member responsibilities. Which capability should the consultant recommend?

- A. Opportunity Teams
- B. Role hierarchy
- C. Account Teams
- D. Sharing rules

Answer: C

NEW QUESTION 121

Cloud Kicks has just deployed an of its configurations. The admin wants to build a separate process but uses most of the objects that were deployed. What is the best practice a consultant should recommend to the admin?

- A. Build m a test release environment and test changes in Production.
- B. Build in a Developer Sandbox and test changes in Production.
- C. Build in a Developer Sandbox and test changes in a test release environment.
- D. Build m a test release environment and test changes in a test release environment.

Answer: C

NEW QUESTION 125

Cloud Kicks needs to implement a group of Campaigns that are related to a specific marketing initiative to report on success. What should a consultant recommend to meet the requirement?

- A. Create a custom Campaign Purpose field.
- B. Create a custom Campaign Group object.
- C. Use the existing Parent Campaign field.
- D. Use a Marketing dashboard from the AppExchange.

Answer: D

NEW QUESTION 130

A small company has hired a consultant to plan its Sales Cloud implementation. The company wants to get up and running with Sales Cloud right away. The deadline has yet to be established, and the requirements still need to be defined. Which project management methodology should a consultant recommend to ensure the implementation is successful?

- A. Six Sigma
- B. Waterfall
- C. Prince2
- D. Agile

Answer: D

NEW QUESTION 132

Universal Containers (UC) has acquired another company that uses Salesforce and is migrating its legacy email alerts, and approval processes. Which two steps should the consultant perform to maintain data integrity? Choose 2 answers

- A. Enable the Create Audit Fields permission to insert historically accurate records.
- B. Use the Salesforce Approval Process clone feature to migrate approval processes.
- C. Merge the legacy Salesforce org into UC's Salesforce org and migrate the approval processes.
- D. Insert users, and then migrate email alerts and approval processes into UCs Salesforce org.

Answer: AD

NEW QUESTION 134

Each year, representatives from Universal Containers attend two major industry conferences that Generate a large volume of leads. A few months after leads have been converted to opportunities, the team wants to determine the return on Investment (ROI) for each industry conference. Which solution should the consultant recommend?

- A. Create the Campaigns related list on the Lead page layout, and associate new leads with a Campaign.
- B. Create a multi-select picklist, and ask representatives to select which conference (s) influence the lead.
- C. Create industry events as Campaigns, add leads as Campaign Members, and utilize Customizable Campaign influence.
- D. Create a Slack channel for each industry conference and mention this channel on all new leads.

Answer: B

NEW QUESTION 135

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

Answer: C

NEW QUESTION 139

Which two considerations should be made when deploying dynamic dashboards? Choose 2 answers

- A. Dynamic dashboards must be manually refreshed.
- B. Dynamic dashboards allow all users to view data as any user.
- C. Dynamic dashboards must be saved in public or shared folders.
- D. Dynamic dashboards require users to follow each component.

Answer: BD

NEW QUESTION 143

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 to build this report?

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

Answer: B

NEW QUESTION 148

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.

Answer: C

NEW QUESTION 151

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.

Answer: B

NEW QUESTION 154

Cloud Kicks (CK) uses a custom object named GumShoe__c. GumShoe__c is the child in a master-detail relationship with the Opportunity object. Staff members use this object to create requests for supporting research. CK wants to easily generate new GumShoe__c records from staff phones by using the Salesforce mobile app.

What should a consultant recommend to meet the requirements?

- A. Create a custom hyperlink to a related list.
- B. Create a Lightning component for mobile.
- C. Create a custom Process Builder process.
- D. Create a Quick Action

Answer: A

NEW QUESTION 158

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

Answer: A

NEW QUESTION 163

Universal Containers (UC) has launched Salesforce Chat and staffed its contact center with agents to chat with website visitors who ask questions about commercial containers. When UC used to outsource its contact center work, reports from the vendor showed that about 15% of chat conversations would result in a new lead. Management wants better visibility into Chat's influence on lead creation in order to continue the program. How can the consultant provide the insights UC needs to justify using Chat with internal contact center staff?

- A. Install the Chat (Live Agent) Dashboard package from the AppExchange
- B. Add a chart to the dashboard to show the number of agent chats associated to new leads compared to the total number of agent chats for the period.
- C. Add a custom field on the Chat Transcript object so agents can check a checkbox when a conversation results in a new lead
- D. Create a report using the custom field.
- E. Create a lead report that identifies the number of new leads with the lead source "Chat".
- F. Ask the marketing department to provide the program with Google Analytics data for the commercialcontainers web pages.

Answer: B

NEW QUESTION 167

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.

Answer: D

NEW QUESTION 168

The project is almost finished, and now it's time to test the changes and updates that have been made before go-live. Cloud Kicks does not have a Partial or Full Sandbox. How should the consultant recommend testing be conducted?

- A. Create a new Sandbox, populate it with data, and ask volunteers to test it with use cases.
- B. Create test Accounts and Opportunities in Production and ask volunteers to test it with use cases.
- C. Create a new Developer Edition org, populate it with data, and ask volunteers to test it with use cases.
- D. Create a new Sandbox and ask volunteers to test it with use cases.

Answer: A

NEW QUESTION 171

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.

Answer: AD

NEW QUESTION 173

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.

Answer: BC

NEW QUESTION 174

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 blank
- C. Use workflows to create a Task for each team member.
- D. Assign Tasks to a queue to share work efficiently.

Answer: D

NEW QUESTION 175

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 closed/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.

Answer: B

NEW QUESTION 179

Cloud Kicks currently supports three business lines within a single Salesforce instance:

Running, Athleisure, and Celebrity Co-Branded. The VP of Athleisure 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.

Answer: AB

NEW QUESTION 184

Cloud Kicks needs to set sales quotas for all sales reps. Which three solutions should the consultant consider? Choose 3 answers

- A. Use the Data Import Wizard.
- B. Enable Forecast Quotas from Setup.
- C. Use the API.
- D. Assign Quota values by profile.
- E. Use Data Loader.

Answer: CDE

NEW QUESTION 189

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/1 for Accounts. CK discovered this caused issues with data quality where reps edited Accounts outside their scope 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 to allow reps to continue to collaborate while eliminating incorrect edits?

Choose 2 answers

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

Answer: BD

NEW QUESTION 192

What are two capabilities of Data Loader? Choose 2 answers

- A. Extracts organization and configuration metadata
- B. Prevents importing duplicate records
- C. Exports field history data
- D. Runs one-time or scheduled data loads

Answer: CD

NEW QUESTION 193

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.

Answer: B

NEW QUESTION 198

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.

Answer: D

NEW QUESTION 203

Sometimes, sales reps need to create contacts without accounts based on business processes. What should the consultant take into consideration about these contacts?

- A. Contacts without accounts need to be shared through sharing rules
- B. Contacts without accounts are shared through the Role Hierarchy.
- C. Contacts without accounts are private and only the owner and admin can view them.
- D. Contacts without accounts need to be manually shared.

Answer: C

NEW QUESTION 208

Cloud Kicks sales reps want to see all of their current opportunities, and the full details, with a minimal amount of navigation or clicks 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.

Answer: D

NEW QUESTION 210

Cloud Kicks has enabled Quotas in forecasts. In which three ways can Quotas be managed for all users in the forecast hierarchy? Choose 3 answers

- A. Insert Quotas using API.
- B. Add/update Quotas using the Data Import Wizard.
- C. Assign Quotas to a forecast period.
- D. Add/update Quotas using Data Loader.
- E. Configure Forecast Quotas.

Answer: ACD

NEW QUESTION 214

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.

Answer: AC

NEW QUESTION 216

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.

Answer: A

NEW QUESTION 220

Cloud Kicks has decided to implement Sales Cloud Einstein. After setting up Sales Cloud Einstein, a consultant finds some of the features are not enabled. What are two steps the consultant can take to troubleshoot the issue? Choose 2 answers

- A. Check Sales Cloud Einstein permission set assignments.
- B. Validate the Connected App Details.
- C. Verify Integration User Profile Details
- D. Reconfigure the Einstein Lead Scoring app.

Answer: BC

NEW QUESTION 224

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.
- C. Create an Email template change set or use the Lightning Platform.
- D. Enable Email Import and use the Import Wizard

Answer: AB

NEW QUESTION 229

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.

Answer: ABC

Explanation:

According to the Salesforce Sales Cloud Consultant Study Guide, it is important to ensure that the organization-wide default sharing is set correctly in order to ensure that Person Accounts can be enabled in the future. It is not necessary to disable the CK customer portal in order to enable Person Accounts. Finally, it is not recommended to set the organization-wide default for both Accounts and Contacts to Public Read/Write.

NEW QUESTION 233

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

Answer: AC

NEW QUESTION 236

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.

Answer: C

NEW QUESTION 240

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

Answer: D

NEW QUESTION 245

Cloud Kicks manages contacts for lead generation in a marketing application. Following a new Salesforce implementation, inbound leads will be reviewed in the marketing application and then migrated to Salesforce.

Which contacts should the consultant migrate from the marketing application to leads in Salesforce?

- A. New contacts
- B. Active contacts
- C. Qualified contacts
- D. All contacts

Answer: C

NEW QUESTION 248

Cloud Kicks (CK) frequently works with contractors for marketing focus groups.

These contractors change companies often, and CK wants to retain its company history through Accounts.

What should the consultant recommend?

- A. Implement the Contacts to Multiple Accounts feature.
- B. Implement Person Accounts to represent the relationship.
- C. Use a junction object to represent the previous companies
- D. Use Account Teams associated with the previous companies.

Answer: A

NEW QUESTION 250

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. REVISE
- C. Remove the user's Opportunity team member.
- D. Remove the Opportunity team related list from page layouts.

Answer: C

NEW QUESTION 251

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