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Salesforce Certified Sales Cloud Consultant

Salesforce Sales-Cloud-Consultant

Version Demo

Total Demo Questions: 61

Total Premium Questions: 613

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Topic Break Down

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QUESTION NO: 1

Cloud Kicks (CK) needs to determine the effectiveness of a recent marketing campaign on new leads' quality. CK is using Einstein Lead Scoring,

Which solution should the consultant recommend?

A. Create a custom object to track the Lead Score and relate it to the Lead.

B. Create a custom score field to capture the marketing Campaign's quality.

C. Add the Lead Score component to the Lead Detail page.

D. Specify a default score of the leads added to the Campaign.

ANSWER: C

Explanation:

Adding the Lead Score component to the Lead Detail page makes Einstein Lead Scoring actionable for evaluating the quality of leads generated by the campaign. Einstein Lead Scoring automatically analyzes historical conversion patterns and relevant lead attributes to assign each lead a predictive score, indicating its relative likelihood of conversion. The component surfaces that score directly where users review a lead, along with the factors that most influenced it. This gives marketing and sales teams a consistent, AI-based measure for assessing newly acquired leads rather than relying on a manually maintained campaign-quality value.

Because campaign membership identifies the leads associated with the recent campaign, CK can review those campaign-generated lead records and use their displayed Einstein scores to understand whether the campaign is producing higher-quality prospects. Teams can use the score in lead review, prioritization, and reporting processes to compare the quality profile of campaign leads and guide follow-up. Salesforce describes Einstein Lead Scoring as a predictive scoring capability that helps users prioritize leads based on their likelihood to convert. See Salesforce Help: Einstein Lead Scoring and Trailhead: Lead Scoring with Einstein.

QUESTION NO: 2

A Cloud Kicks sales team based in the U. S. wants to grow market share in Australia. The organization has multi-currency enabled and has added the Australian Dollar as an available currency.

How can the consultant allow the sales team to report on Australian deal values in USD?

A. Use USD for Australia Opportunity currencies.

B. Enable parenthetical currency conversion.

C. Set each sales user's default currency to the Australian Dollar.

D. Create a formula field to perform a currency calculation on the Opportunity amount.

ANSWER: B

Explanation:

Enable parenthetical currency conversion. With multicurrency enabled, Cloud Kicks can keep Australian opportunities denominated in Australian dollars while allowing users whose personal currency is USD to see converted USD values as a secondary, parenthetical amount. This preserves the opportunity’s transaction currency and provides the sales team with a familiar USD view for evaluating and reporting on Australian pipeline and deal values. The displayed converted amount uses the organization’s active currency conversion rates, so it is consistently calculated from the AUD amount rather than requiring users to manually convert values.

Parenthetical currency conversion is particularly appropriate when users need visibility into both the record currency and their own default currency. For the U.S.-based sales team, users should have USD set as their personal currency so that the secondary converted value appears in USD. Salesforce documents that, when this feature is enabled, users see a converted secondary currency value based on their personal currency. See Salesforce's multicurrency implications documentation and currency setup documentation.

QUESTION NO: 3

Universal Containers (UC) wants to make it easier for sales reps to log their customer

interactions, such as emails and events, directly from their email and calender applications. UC

wants to report on these activities in Salesforce.

Which two actions should the consultant recommend?

Choose 2 answers

A. Implement Inbox to sync Outlook or Gmail calender events.

B. Log emails with records in Salesforce from Outlook or Gmail.

ANSWER: A B

Explanation:

Implementing Inbox to sync Outlook or Gmail calendar events supports a streamlined sales-rep workflow by connecting the user's email and calendar environment with Salesforce. Reps can work from the tools they use every day while relevant customer meeting activity is made available in Salesforce. This reduces manual data entry and helps ensure customer interactions are captured consistently. Salesforce Inbox is designed to integrate Salesforce with Microsoft Outlook or Gmail and includes productivity features for working with email and calendar information.

Logging emails with records in Salesforce from Outlook or Gmail is also essential because it associates correspondence with the appropriate Salesforce records, such as leads, contacts, accounts, and opportunities. Once email activity is logged to Salesforce, it is available in the activity history and can support visibility into sales engagement and activity reporting. Together, these capabilities address both required interaction types—emails and events—while allowing representatives to capture them directly from their email and calendar applications. Configuration should align activity-capture and retention choices with UC's reporting requirements, especially where the organization needs activities stored as Salesforce records for standard reporting.

See Salesforce's Outlook Integration documentation and Gmail Integration documentation.

QUESTION NO: 4

A consultant has successfully deployed Sales Cloud at Cloud Kicks.

What is the final step in completing an engagement?

A. Activate users in the system.

B. Validate the implementation.

C. Obtain stakeholder sign-off.

ANSWER: C

Explanation:

Obtain stakeholder sign-off is the final step in completing the engagement. After the Sales Cloud solution has been deployed and validated against the agreed business and technical requirements, formal acceptance confirms that the customer's authorized stakeholders agree the implementation meets the engagement's defined scope and success criteria. This sign-off establishes a clear project closure point, documents customer acceptance of the delivered solution, and supports the transition from implementation to ongoing ownership, support, and adoption activities. A consultant should ensure that acceptance criteria, deliverables, any remaining follow-up items, and ownership of post-deployment actions are clearly captured as part of this closure process. Salesforce's implementation guidance emphasizes aligning delivery with measurable outcomes and managing the transition to a successful operational state. Formal acceptance is therefore the appropriate final engagement milestone once the configured solution is live and ready for business use. See Salesforce's Salesforce Strategy Decision Guide and Salesforce change management guidance for principles supporting outcome alignment, stakeholder engagement, and sustained adoption.

QUESTION NO: 5

Cloud Kicks is in the process of implementing Sales Cloud for its sales teams. Senior management has concerns about adoption.

What should a consultant recommend to encourage adoption?

A. Establish goals and key metrics.

B. Re-define the sales process.

C. Run training in a sandbox environment.

ANSWER: A

Explanation:

Establish goals and key metrics is the right recommendation because adoption must be treated as a measurable business outcome, not merely as a completed deployment activity. Clear goals give sales leadership and users a shared definition of successful Sales Cloud usage, such as consistently maintaining opportunity data, logging customer interactions, progressing deals through defined stages, or using dashboards during pipeline reviews. Metrics then make progress visible and allow the organization to identify where additional enablement, process refinement, or executive reinforcement is needed.

Effective adoption measures should connect system behavior to sales outcomes. For example, Cloud Kicks can track active usage, record completeness, opportunity updates, forecast participation, and sales-cycle or conversion trends. When users understand how the system supports their day-to-day selling activities and managers use the same measures in regular coaching and operating cadences, Salesforce becomes embedded in the sales process. Salesforce's adoption guidance emphasizes defining success measures, monitoring them, and using the results to drive continuous improvement. See Salesforce's adoption dashboards guidance and the Sales Cloud Basics Trailhead module for practical context on measuring and managing sales work in Salesforce.

QUESTION NO: 6

Cloud Kicks uses Chatter to collaborate corporate-wide. Sales representatives are getting too many items showing on their feed, so it's hard to sort through to find items that are high priority or need the sales representative's immediate attention.

Which solution should the Consultant recommend?

A. Create a Chatter Feed page layout.

B. Create Chatter topics.

C. Increase Chatter Feeds bookmark limit.

D. Increase the Chatter follower limit.

E. Create Chatter Streams.

ANSWER: E

Explanation:

Creating Chatter Streams is the appropriate recommendation because streams let each sales representative organize and monitor a targeted subset of Chatter activity rather than relying on one high-volume, undifferentiated feed. A user can create streams based on people, records, and groups that matter most to their work, such as strategic accounts, key opportunities, their manager, or an escalation group. This gives the representative a focused view of relevant updates and makes urgent or high-priority collaboration easier to find without changing the organization’s overall Chatter usage or restricting collaboration for other users.

Streams are personal organizational tools: each user can tailor the streams they follow to their own territory, pipeline, and responsibilities. This is particularly useful for a corporate-wide Chatter deployment, where the volume of posts can be substantial and priorities vary among representatives. Salesforce describes Chatter streams as a way to keep track of posts from selected people, groups, and records in one place. See Salesforce Help: Chatter Streams and Trailhead: Chatter Streams.

QUESTION NO: 7

Cloud Kicks has three unique product lines, each with a unique sales cycle. Prospect qualification is consistent across the product lines; sales representatives then follow the specific product line’s sales cycle.

Which two actions should a Consultant recommend to achieve these requirements? (Choose two.)

A. Create public groups for each opportunity sales process.

B. Create sales processes to map to each opportunity record type.

C. Define the default opportunity teams for each opportunity record type.

D. Define sales stages that align with opportunity record types.

E. Create opportunity record types for each sales process.

ANSWER: B E

Explanation:

Cloud Kicks should create sales processes to map to each opportunity record type and create opportunity record types for each sales process. In Salesforce, a sales process defines the set of Opportunity Stage values available to users. Creating a separate sales process for each product line lets the organization present only the stages that apply after the common qualification activity, supporting each product line’s distinct sales cycle without changing the underlying Opportunity object.

Each sales process is made available to users through an Opportunity record type. The record type associates the applicable sales process with the appropriate page layout and makes that process selectable when a representative creates or updates an opportunity for that product line. This configuration gives representatives a clear, product-specific path through the pipeline while allowing the shared qualification stage to be included consistently in all relevant sales processes. Salesforce documents that sales processes are used to control Opportunity stage values and are assigned to Opportunity record types; record types can then provide distinct business processes and layouts for different business needs. See Salesforce Help: Define Sales Processes and Salesforce Help: Record Types.

QUESTION NO: 8

Cloud Kicks has started its operations in Europe in addition to the U. S. The company has enabled Advanced Currency Management to support both EUR and USD. Cloud Kicks also has existing roll-up summary fields.

Where are currency related roll-up summary fields supported?

A. From the Opportunity object rolling up to the Account object

B. From the Account object rolling up to the Opportunity object

C. From any custom object to the Opportunity object

D. From the Opportunity line object to the Opportunity object

ANSWER: D

Explanation:

With Advanced Currency Management enabled, currency-related roll-up summary fields are supported when the roll-up occurs between objects that both support Advanced Currency Management. Therefore, a roll-up from the Opportunity Line Item object to its parent Opportunity is supported. Opportunity Line Items use the currency context of their parent Opportunity, and the Opportunity is an Advanced Currency Management-enabled object. This enables Salesforce to calculate the summarized currency values correctly using the dated exchange rates applicable to the Opportunity's close date. This behavior is particularly important for Cloud Kicks because historical conversion rates can differ from current rates when reporting and summarizing EUR and USD business over time. Salesforce identifies Opportunity Products (Opportunity Line Items) rolling up to Opportunities as a supported Advanced Currency Management roll-up-summary relationship. Administrators should confirm this behavior when designing currency fields and summary calculations in multicurrency organizations, particularly where historical exchange-rate accuracy is required. See Salesforce's Advanced Currency Management documentation and the OpportunityLineItem object reference.

QUESTION NO: 9

Cloud Kicks imports Leads from events and also allows sales reps to create Leads manually. Sales operations wants to warn users when a Lead appears to be a duplicate and prevent duplicate records from being created.

Which two features should the consultant recommend?

Choose 2 answers

A. Matching rules

B. Duplicate rules

C. Lead assignment rules

D. Validation rules

E. Escalation rules

ANSWER: A B

Explanation:

Matching rules define the criteria Salesforce uses to identify potential duplicate records. For example, Cloud Kicks can compare Lead email address, company name, and phone number to determine whether an incoming or newly created Lead matches an existing record.

Duplicate rules determine what Salesforce does when the matching rule identifies a possible duplicate. The duplicate rule can alert the user and block the creation of the duplicate Lead, helping sales operations maintain a clean prospect database. Salesforce documents these features in Duplicate Management.

QUESTION NO: 10

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: C D

Explanation:

“Deploy after the Salesforce Release.” is appropriate because production is upgraded during its scheduled Salesforce release window. Scheduling the deployment after that upgrade ensures that the configuration is deployed into the same release version that users will have in production. This avoids introducing a change while the production environment is in transition and allows the project team to complete release-aware validation before promoting the configuration.

“Test new configurations in a Preview Sandbox.” is also appropriate because preview sandboxes receive the upcoming seasonal Salesforce release before production. They provide the intended environment for testing configuration behavior, integrations, customizations, and user workflows against the new release version in advance. The team can identify and address release-related impacts before production is upgraded, then deploy the validated configuration after the production release has completed. Salesforce distinguishes preview and non-preview sandbox upgrade timing specifically to support this type of release readiness planning. See Salesforce’s Sandbox Refresh and Release Timing documentation and the Salesforce Release Calendar for release-window planning.

QUESTION NO: 11

Northern Trail Outfitters gains sales leads at its annual trade show. Duplicate leads are generated when they are imported and already exist in the system.

What should be done to address the issue with duplicate leads?

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 the Data Import Wizard and select the appropriate field to match duplicates against existing records.

ANSWER: D

Explanation:

Upload the leads using the Data Import Wizard and select the appropriate field to match duplicates against existing records. The Data Import Wizard supports importing lead records while checking for existing records based on selected matching criteria. For leads, an administrator can choose fields such as email address to identify records that are already present, allowing the import process to update matching records rather than creating additional duplicates. This is particularly appropriate for a trade-show list, where email is commonly available and provides a practical matching value for identifying a previously captured lead. Before the import, the consultant should confirm that the chosen match field is consistently populated and follows a standardized format in both the source file and Salesforce. This approach handles duplicate prevention as part of the import workflow, reducing manual cleanup and helping preserve a single, reliable lead record for each prospective customer. Salesforce also provides duplicate management features, including matching rules and duplicate rules, that can further support the organization’s broader data-quality strategy and alert or block users when duplicate records are created outside this import process. See Salesforce’s Import Data into Salesforce guidance and Duplicate Management documentation.

QUESTION NO: 12

Universal Containers recently implemented Sales Cloud. Stakeholders want insights into how logging interactions with customers impacts the number of won sales deafs.

Which report should the consultant create to meet the requirement?

A. Closed Won Opportunities by Account

B. Closed Won Opportunities with Activities

C. Closed Won Opportunities by the sales team

D. Closed Won Opportunities with Recommendations

ANSWER: B

Explanation:

Closed Won Opportunities with Activities is the appropriate report because it combines opportunity outcome data with the customer-interaction records logged against those opportunities. The consultant can use the Opportunities with Activities report type, filter the Opportunity Stage to Closed Won, and then group or summarize results based on whether activities exist and by activity characteristics such as type, date, owner, or status. This provides a direct way to assess the relationship between sales-team engagement—such as calls, emails, meetings, and tasks—and successful deals.

Salesforce activities include tasks and events that users associate with records, including opportunities. Reporting on opportunities together with activities lets stakeholders evaluate activity volume and patterns for deals that were won, rather than viewing closed revenue without the interaction context. The report can also be enhanced with charts and dashboard components to show measures such as won-opportunity count by activity type or number of completed interactions. Salesforce documents that custom report types determine the records and relationships available for reporting, while opportunity reports can be filtered and grouped to analyze pipeline outcomes. See Salesforce report type overview and Salesforce activities overview.

QUESTION NO: 13

The Cloud Kicks marketing team wants to view and report in Lightning on any opportunities created as a result of 2 Campaign. Which two choices should a consultant recommend meeting the requirement?

Choose 2 answers

A. Use Data Loader to export Opportunity and Campaign Influence and merge the results.

B. Enable Customizable Campaign Influence in Setup.

C. Add the Campaign Influence related list to the Opportunity page layouts.

D. Create a joined report between Opportunity and Campaign to show influence.

ANSWER: B C

Explanation:

Enable Customizable Campaign Influence in Setup and add the Campaign Influence related list to the Opportunity page layouts. Customizable Campaign Influence lets an organization use campaign-influence attribution models to associate campaign touchpoints with opportunities and assign influence amounts or percentages. This provides the underlying Campaign Influence data needed to evaluate how multiple campaigns contributed to an opportunity, rather than limiting analysis to a single primary campaign. The feature also supports reporting with the standard campaign-influence reporting capabilities in Lightning.

Adding the Campaign Influence related list to Opportunity page layouts makes those campaign-to-opportunity associations visible directly to sales and marketing users while they review an opportunity. Users can therefore see the campaigns credited with influencing the record, including the two relevant campaigns, and use the same relationship data in reports. Salesforce documents how to enable and configure customizable influence models and how Campaign Influence records connect campaigns to opportunities. See Customizable Campaign Influence and Campaign Influence.

QUESTION NO: 14

Cloud Kicks wants to streamline the approval process and give sales managers more efficient ways to approve opportunities in a timely manner.

Which strategy should the consultant recommend to improve Approval Processes?

A. Allow managers to approve or reject requests via an email.

B. Configure Einstein Opportunity Insights to approve requests.

C. Add a dashboard of pending approvals to the Chatter feed.

ANSWER: A

Explanation:

Allow managers to approve or reject requests via an email is the appropriate recommendation because Salesforce approval processes can send approval-request emails to assigned approvers and enable them to act directly from the email message. This supports timely opportunity decisions by letting sales managers approve or reject requests without first navigating to the Salesforce user interface, which is especially useful when they are working from their inbox or on mobile devices. The email approval response is recorded by Salesforce and the approval process then follows its configured actions, such as updating the opportunity, notifying users, or advancing to another approval step. To use this capability effectively, the consultant should ensure that the approval process has appropriate email templates and assigned approvers, and that managers understand they must reply using Salesforce-supported approval response formats. This approach uses a standard Salesforce approval-process capability to reduce approval delays while maintaining the organization's established approval routing, record history, and audit trail. Salesforce documents email-based approval actions in its approval process implementation guidance: Approve or Reject Requests by Email. For broader configuration details, see Approval Processes.

QUESTION NO: 15

Northern Trail Outfitters (WTO) wants to share revenue from opportunities with multiple reps. A consultant recommends using opportunity splits.

Which two prerequisites should be considered before splits are enabled?

Choose 2 answers

A. Add customized split types before enabling splits.

B. Resolve any inactive currencies prior to enabling splits.

C. Transfer opportunities owned by Inactive users to active users.

D. Enable opportunity teams and add the opportunity owner as a team member.

ANSWER: B C

Explanation:

“Resolve any inactive currencies prior to enabling splits.” and “Transfer opportunities owned by Inactive users to active users.” are the required pre-enable considerations. Opportunity Splits allocates an opportunity's revenue or credit among users, and Salesforce requires the org's currency configuration to be in a usable state before the feature can be turned on. In a multicurrency org, any inactive currencies must be addressed first; this prevents historical opportunity amounts from being associated with a currency that is unavailable when split amounts are created and calculated.

Opportunity ownership must also be reviewed. Opportunities owned by inactive users need to be transferred to active users before Opportunity Splits is enabled. An active owner is necessary for Salesforce to establish and manage the split records and allocation process consistently across existing opportunities. Completing this ownership cleanup beforehand avoids activation issues and ensures that existing pipeline records can participate in the feature after it is enabled. Salesforce documents these activation considerations in its Enable Opportunity Splits help topic. For broader context on how revenue splits allocate opportunity amounts among users, see Opportunity Splits.

QUESTION NO: 16

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

Explanation:

Set Account to Public Read Only, and Opportunity to Private. This combination supports both stated business requirements at the organization-wide default level. Public Read Only access on Account lets users search for and view existing Account records across the organization. Before entering a new Account, a user can therefore check whether the customer already exists, helping prevent duplicate Account creation. Because the access is read-only, broad visibility does not by itself give users permission to alter Accounts they do not own.

Setting Opportunity to Private restricts access to Opportunity records to the record owner and users above that owner in the role hierarchy, unless access is subsequently granted through an applicable sharing mechanism. This prevents peer sales users from routinely viewing one another's Opportunities while preserving the ability to provide deliberate exceptions through sharing when the sales process requires collaboration. Salesforce identifies the organization-wide default as the baseline level of record access, with sharing and hierarchy-based access used to open access beyond that baseline. See Salesforce: Organization-Wide Defaults and Salesforce: Record-Level Security and Sharing.

QUESTION NO: 17

The admin at Cloud Kicks needs to understand the adoption of Salesforce Files and multi-factor authentication.

What should a consultant recommend analysing adoption?

A. Review the Setup Audit Trail.

B. Create a report for the Login History object.

C. Run the Salesforce Optimizer.

D. Open the Lightning Usage App.

ANSWER: C D

Explanation:

Running Salesforce Optimizer is appropriate because it produces a consolidated assessment of an org's configuration, feature usage, and adoption-related health indicators. Its report includes actionable findings across areas such as security and user access, helping an administrator assess the organization's multi-factor authentication posture and identify recommended improvements. Optimizer is designed to turn configuration and usage data into prioritized recommendations that can be reviewed over time.

Opening the Lightning Usage App is also appropriate because it provides adoption analytics for Lightning Experience and key Salesforce functionality. The app gives administrators prebuilt dashboards and reports for monitoring how users engage with Salesforce, including feature-level usage information that supports evaluating Salesforce Files adoption. These usage metrics help a consultant establish a baseline, identify where enablement may be needed, and measure whether adoption changes after training or process improvements.

Using both tools gives Cloud Kicks complementary visibility: Salesforce Optimizer provides an org-wide health and security-oriented assessment, while the Lightning Usage App provides user-adoption analytics. Salesforce documents these capabilities in Salesforce Optimizer Overview and Lightning Usage App Overview.

QUESTION NO: 18

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

Which feature should a consultant recommend building this report?

A. Custom report type

B. Joined report

C. Custom filter

D. Cross filter

ANSWER: D

Explanation:

Cross filter is the appropriate feature because it lets a report identify parent records based on the presence or absence of related child records. The consultant can start with an Accounts report, apply a cross filter for Accounts with Opportunities, and add criteria that limit those Opportunities to open records. A second cross filter can identify Accounts without Contacts. This directly produces the desired gap analysis: accounts that have at least one open opportunity but no associated contact records.

Cross filters are designed for relationship-based reporting questions such as finding accounts with or without related records, and they can be further refined using subfilters on the related object. This allows the Opportunity relationship to be constrained by its status while the Contact relationship is evaluated for missing records. The report remains focused on Account records, making the results actionable for sales users who need to add contacts to accounts that are actively being pursued.

For Salesforce guidance on using cross filters and subfilters to report on related records, see Salesforce Help: Cross Filters. For general report filtering concepts, see Salesforce Help: Filter Report Data.

QUESTION NO: 19

A Consultant is configuring Einstein Forecasting to help the sales team predict how much they will sell by the end of a forecasting period.

Which two considerations should the consultant keep in mind to ensure that predictions are displayed.

Choose 2 answers

A. Predictions are only shown when data sync in Tableau CRM is enabled. Tableau

B. Predictions are based only on the standard Close Date and Amount fields

C. Predictions are only shown when at least 12 months of Opportunity data exists

D. Predictions are only shown when the user is in the forecasting hierarchy.

ANSWER: C D

Explanation:

Einstein Forecasting requires sufficient historical opportunity information before it can train a prediction model and present a forecast prediction. The requirement for at least 12 months of Opportunity data gives Einstein enough past sales outcomes and trends to establish a meaningful baseline for the forecast period. Consultants should confirm that the organization has the necessary historical data before expecting prediction values to appear.

Predictions are also displayed only for users who participate in the forecasting hierarchy. The hierarchy establishes the forecast rollup structure, identifies the forecast users and managers, and controls whose forecasts can be viewed or adjusted. A sales representative must be represented in that hierarchy to have a forecast record in the Collaborative

Forecasts experience where Einstein's prediction can be surfaced. During implementation, the consultant should therefore validate both the historical-data requirement and the assignment of the relevant sales users to the active forecast hierarchy. Salesforce's forecasting setup guidance explains the relationship between forecast users, hierarchy setup, and forecast visibility, while its Einstein Forecasting documentation describes the data preparation and prediction requirements. See Salesforce Help: Forecast Hierarchy and Salesforce Help: Einstein Forecasting.

QUESTION NO: 20

A consultant has conducted Discovery sessions with Cloud Kicks stakeholders and is ready to start gathering use cases for Sales Processes.

Which two groups should provide content for the use cases?

Choose 2 answers

A. Sales reps

B. Finance team

C. Sales operations

D. Executives

ANSWER: A C

Explanation:

Sales reps and **Sales operations** should provide the core content for sales-process use cases. Sales reps are the people who perform the day-to-day selling activities, so they can describe the real workflow from lead qualification through opportunity management, quoting, follow-up, and closing. Their input identifies the activities, data they need at each step, practical pain points, and the outcomes that make a process usable in the field.

Sales operations contributes the operational and governance perspective. This group commonly owns or supports process standardization, pipeline management, sales reporting, territory and assignment practices, data quality, and adoption. Their participation ensures that the documented use cases support scalable processes, measurable business outcomes, and the organization's broader sales operating model. Together, these groups provide both the frontline execution details and the process-management requirements needed to define effective Salesforce sales processes.

Salesforce's guidance on discovery emphasizes engaging the people who perform work and the stakeholders responsible for business processes so requirements reflect both user needs and organizational goals. See Salesforce Trailhead: Discover Sales Cloud Requirements and Salesforce Trailhead: Business Analysis Project Life Cycle.

QUESTION NO: 21

Cloud Kicks wants to set up contacts and accounts, where contacts can be associated to multiple accounts.

Which configuration allows for this setup?

A. Set up lookup fields on the Contact object for multiple accounts.

B. Create a custom object between the Account object and Contact object.

C. Enable users to relate a contact to multiple accounts in Setup.

ANSWER: C

Explanation:

Enable users to relate a contact to multiple accounts in Setup. This configuration activates Salesforce's Contacts to Multiple Accounts feature, which is designed for business scenarios in which one individual has relationships with more than one company. After the feature is enabled, Salesforce retains one account as the contact's direct account through the standard

Account Name field and lets users create additional account-contact relationships. These relationships are represented by the standard Account Contact Relationship record and can include relationship-specific information, such as the person's role at that account and whether the relationship is active.

This model preserves the standard Contact and Account data architecture while accurately representing shared contacts, such as consultants, board members, or employees who work with partner organizations. Administrators can enable the feature from Setup, and users with appropriate access can then add related accounts from a contact or account record. Salesforce documents the feature and its behavior in its Account Contact Relationship object reference: Account Contact Relationship. For implementation guidance and considerations, see Salesforce Help: Contacts to Multiple Accounts.

QUESTION NO: 22

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: A D

Explanation:

Moving the users to the top of the role hierarchy is appropriate because users who own very large numbers of records can cause substantial sharing recalculation work when their position affects access granted through the hierarchy. Placing these high-volume owners near the top reduces the number of roles and users below them that can inherit access to their records, thereby reducing the volume of implicit sharing that Salesforce must maintain and recalculate after sharing-model changes.

Removing the users from the role hierarchy is also an effective solution when those users do not require role-based access. A user without a role does not participate in role-hierarchy sharing, which prevents the user's large record set from generating hierarchy-based access grants. This is a common optimization for high-volume record owners whose access requirements can instead be addressed through ownership, sharing rules, teams, territories, or other targeted sharing mechanisms. Salesforce's sharing architecture guidance emphasizes minimizing the effect of high-volume ownership and the role hierarchy on sharing calculations. See Salesforce Developer Guide: Sharing Architecture and Salesforce Architects: Record Access.

QUESTION NO: 23

Universal Containers recently implemented Sales Cloud. Stakeholders want insights into how logging interactions with customers impacts the number of won sales deals.

Which report should the consultant create to meet the requirement?

A. Closed Won Opportunities by the sales team

B. Closed Won Opportunities by Account

C. Closed Won Opportunities with Activities

ANSWER: C

Explanation:

Closed Won Opportunities with Activities is the appropriate report because it combines opportunity outcome data with the customer interactions that sales users log as activities. The consultant can filter the report to opportunities whose stage is Closed Won, then analyze associated tasks and events, such as calls, emails, meetings, and follow-ups. This makes it possible to identify whether won deals had logged interactions, how frequently those interactions occurred, and which activity patterns are associated with successful outcomes. For example, stakeholders can group results by activity type, opportunity owner, or close period, and use summary metrics to compare the volume of activity recorded for won opportunities. Salesforce reporting supports reports that use related records, enabling organizations to evaluate activity information in the context of sales records rather than viewing activities in isolation. The report therefore directly addresses the stated goal of understanding the relationship between logging customer interactions and won sales deals. Additional guidance on activity reporting and reporting configuration is available in the Salesforce Activities Reports documentation and the Salesforce Custom Report Types overview.

QUESTION NO: 24

Cloud Kicks has configured Einstein Activity Capture (EAC) for email and is waiting to deploy it. In the meantime, a consultant is preparing training to help end users get up to speed on the product.

Which two points should the consultant include in the training information?

Choose 2 answers

A. Users can choose to show emails added via EAC in the Related Lists activities view.

B. Users must connect an email account to Salesforce and agree to terms before they can send emails in Lightning.

C. Users can set their Excluded Addresses list which takes priority over the global Excluded Addresses list.

D. Users can share individual emails or make them private.

ANSWER: A B

Explanation:

Users can choose to show emails added via EAC in the Related Lists activities view because Einstein Activity Capture supports adding a captured email to Salesforce when the user wants that email retained as a Salesforce activity. This makes the email accessible in the relevant record context, including activity-related interfaces, rather than limiting the user to the automatically captured view alone. Training should clarify that users can make this choice for emails that need to be visible as part of the Salesforce record history.

Users must connect an email account to Salesforce and agree to terms before they can send emails in Lightning because connecting the user's Microsoft or Google account is a required onboarding step for Einstein Activity Capture. The connection authorizes Salesforce to work with the user's mailbox and enables the email integration experience. Users also complete the applicable authorization and terms flow during setup. Preparing users for this initial connection step reduces deployment friction and helps ensure they can use the Lightning email experience as intended. Salesforce's guidance on configuring and using Einstein Activity Capture is available in Salesforce Help: Einstein Activity Capture and the related Trailhead learning module.

QUESTION NO: 25

The VP of sales at Cloud Kicks wants the sales team to use the Salesforce mobile app to complete their tasks. The sales team needs to create

and edit leads, contacts, and opportunities with ease.

Which feature should the consultant recommend the sales team use?

A. Smart Actions

B. Lightning Mobile Component

C. Einstein Activity Capture

ANSWER: A

Explanation:

Smart Actions are the appropriate recommendation because they provide mobile-optimized, contextual shortcuts for common sales work. In the Salesforce mobile app, users can access actions directly from a record or from the action menu rather than navigating through multiple full record pages. Standard object actions can be configured for activities such as creating records and updating existing records, enabling representatives to capture or maintain lead, contact, and opportunity information while working away from a desktop browser.

For this requirement, the important benefit is that Smart Actions present a focused action layout containing only the fields needed for the task. A consultant can tailor these layouts to make frequent data-entry processes faster and more consistent for the sales team. Actions can also be placed in the Salesforce mobile app's action bar and on relevant record pages, making the functionality easy to discover in the context where sales users need it. This supports efficient creation and editing of core sales records without requiring a custom mobile development effort. Salesforce describes quick actions and their configurable layouts in its Quick Actions overview, and documents mobile support for actions in the Salesforce Developer Guide.

QUESTION NO: 26

Sales reps at Cloud Kicks are spending too much time coordinating meetings with prospective clients.

Which solution should a consultant recommend to schedule meetings more efficiently?

A. Share the sales reps' Salesforce calendar with clients.

B. Utilize the Insert Availability feature in Salesforce Inbox.

C. Ask clients to share their Outlook calendars.

D. Create a site that clients can access to schedule meetings.

ANSWER: B

Explanation:

Utilize the Insert Availability feature in Salesforce Inbox. This feature is designed specifically to reduce the back-and-forth involved in arranging meetings. From the Inbox email composer, a sales representative can select available times from their connected calendar and insert those time slots directly into an email to the prospective client. The recipient can then choose a suitable time, allowing the representative to confirm the meeting without manually typing availability or repeatedly comparing calendars.

This approach keeps scheduling in the representative's existing email workflow while using the calendar information already available through Salesforce Inbox integrations. It is especially appropriate for prospecting and sales-cycle communications because it lets representatives offer controlled availability rather than exposing an entire calendar. Salesforce Inbox combines Salesforce productivity capabilities with email and calendar workflows, helping sellers spend less time on administrative coordination and more time engaging customers. Salesforce documents the availability-sharing capability in its Insert Availability in Salesforce Inbox guidance and provides broader configuration details in the Salesforce Inbox documentation.

QUESTION NO: 27

The Universal Containers sales team wants to easily show Account relationships to its sales reps and report on these relationship.

Which two considerations should the consultant take into account?

Choose 2 answers

A. Account relationships are visible from Person Account records.

B. A Person Account can be either a parent or child in the Account Hierarchy.

C. Account Hierarchy displays only the Amounts users have Read permission to view.

D. Accounts can be organized into different divisions based on specific criteria.

ANSWER: C D

Explanation:

Account Hierarchy is the standard Salesforce capability for presenting related business accounts to sales representatives. It uses the Parent Account relationship to give users a navigable view of related accounts, making complex customer structures easier to understand. In addition to a straightforward parent-child structure, organizations can use account relationships and appropriate account fields to organize accounts into meaningful divisions based on business-specific criteria, such as subsidiaries, regions, lines of business, or ownership structures. This gives representatives useful context while viewing an account and supports reporting on the account data and relationship model.

Visibility remains governed by Salesforce's sharing and field-level security model. Within the Account Hierarchy, users see monetary information only when they have permission to read the applicable Amount field. This is important when exposing a hierarchy broadly to sales users because it allows the organization to provide relationship context without bypassing established access controls for sensitive financial data. Salesforce documents the hierarchy feature and its visibility behavior in its Account Hierarchy documentation. For an overview of structuring account relationships, see the Salesforce Trailhead account organization module.

QUESTION NO: 28

Universal Containers uses Sales Territories and is working with a consultant to reassign Accounts into new territories.

Which attribute of Sales Territories should the consultant consider when developing the new territory model?

A. The system administrator profile is required to run territory planning reports.

B. A model must be activated in order to view reassigned accounts.

C. All Account assignment rules should be run when the model state is set to Planning.

ANSWER: C

Explanation:

All Account assignment rules should be run when the model state is set to Planning. In Enterprise Territory Management, a planning model is the workspace used to design and validate a proposed territory structure before it affects the organization's live account access and territory assignments. The consultant can define the territory hierarchy, configure assignment rules, and run those rules against Accounts while the model remains in the Planning state. Running every relevant assignment rule at this stage lets the team evaluate the proposed reassignment results, identify gaps or unintended assignments, and refine rule criteria or territory structure before deployment.

This process is especially important when Accounts are being moved into new territories because the model should be validated as a complete whole, rather than activating a structure with untested rule outcomes. After the proposed assignments have been reviewed and the model is ready for production use, the organization can activate the model. Salesforce's Enterprise Territory Management learning material describes planning models as the place to build and test territory structures and assignment rules before activation. See Salesforce Trailhead: Learn About Enterprise Territory Management and Salesforce Help: Enterprise Territory Management.

QUESTION NO: 29

Northern Trail Outfitters (NTO) wants the ability to share documents related to an opportunity, such as contracts and proposals, with the field sales team. NTO currently has a private sharing model.

How should the documents be shared efficiently and securely?

A. Emailed to the sales team on the opportunity record

B. Uploaded to a library that is shared with the field sales organization

C. Uploaded to Salesforce Files and shared with the field sales organization

D. Uploaded to Salesforce Files from the opportunity record

ANSWER: B

Explanation:

Uploading the documents to a library that is shared with the field sales organization provides centralized, controlled access to sales collateral such as contracts and proposals without requiring access to every related opportunity record. A Salesforce CRM Content library is designed to organize reusable business content and distribute it to defined audiences. Library permissions can be assigned to the appropriate users or groups, allowing NTO to provide the field sales team with only the level of access needed, such as viewing or contributing content.

This approach remains effective even when opportunity sharing is private because access to library content is managed independently through library membership and permissions. It also avoids inefficient, duplicate distribution of documents and ensures that field representatives can find the current approved version in one governed location. Content owners can maintain and update materials centrally while the team continues to use the same shared library link and content records. Salesforce describes libraries as locations for organizing and sharing files with users, and explains that library permissions control members' abilities to access and manage content. See Salesforce Help: Content Libraries and Salesforce Help: Library Permissions.

QUESTION NO: 30

Cloud Kicks acquired a company. The VP of technology wants to migrate all the sales data into Sales Cloud.

Which data migration sequence should the consultant recommend for the objects?

A. Opportunities, Products, Product Line Items, Cases, Leads, Campaigns, Accounts, Contacts

B. Accounts, Contacts, Opportunities, Products, Product Line Items, Cases, Leads, Campaigns

C. Accounts, Opportunities, Contacts, Products, Product Line Items, Cases, Leads, Campaigns

ANSWER: B

Explanation:

Accounts, Contacts, Opportunities, Products, Product Line Items, Cases, Leads, Campaigns is the appropriate sequence because it establishes the core customer and sales records before loading records that rely on those relationships. Accounts provide the customer-company foundation, and Contacts can then be associated with their respective accounts. Opportunities can subsequently be related to the appropriate accounts, creating the sales records that represent potential revenue.

Product records must exist before product line items can be created. In practice, the migration also needs the required standard price book and price book entries in place, because an opportunity product (OpportunityLineItem) references both an opportunity and a price book entry. Loading Product Line Items after Opportunities and Products therefore preserves the required sales-data relationships. Cases can then be associated with the migrated account and contact records. Leads and Campaigns can be loaded afterward because they do not need to be created before the foundational account, contact, opportunity, and product data. This dependency-aware approach supports accurate record associations and reduces migration errors. Salesforce's data migration guidance is available in Import Data into Salesforce, and the OpportunityLineItem relationship requirements are documented in the OpportunityLineItem object reference.

QUESTION NO: 31

Which data migration sequence should consultant recommend for the objects?

A. Opportunities, Products, pe Line toe Cases, Leads, Campaigns, Accounts, Contacts:

B. Accounts, Opportunities, Contacts, Products, Product Line Items, Cases, Leads, Campaigns

C. Contacts, Accounts, Leads, Campaigns, Opportunities, Products, Product Line Items, Cases.

D. Accounts, Contacts, Opportunities, Products, Product Line Items, Cases, Leads. Campaigns

ANSWER: D

Explanation:

Accounts, Contacts, Opportunities, Products, Product Line Items, Cases, Leads. Campaigns is the recommended sequence because it establishes the primary customer records before loading records that commonly relate to them. Accounts should be migrated first so their Salesforce IDs can be used when loading Contacts, Opportunities, and Cases. Loading Contacts immediately after Accounts also makes the customer model available before downstream sales-process data is introduced. Opportunities can then be associated with their Account records. Products must exist before Product Line Items are loaded, because each product line item needs to reference the appropriate product and, in a real implementation, an active price book entry. Cases can be loaded after the customer records to preserve their Account and Contact relationships. Leads and Campaigns are included later because neither requires the Account-to-Contact-to-Opportunity hierarchy used by the core customer and pipeline migration. Consultants should use external IDs and relationship fields where possible so that parent-child references remain intact across load jobs. Salesforce's Data Loader is designed for bulk import and export operations, while Salesforce's object reference documents the standard objects and relationships that must be considered during migration. See Salesforce Data Loader documentation and the Salesforce Object Reference.

QUESTION NO: 32

Universal Containers is migrating data from a legacy system into Salesforce.

Which two considerations should a consultant take into account when importing Campaign Members?

Choose 2 answers

A. Leads, Contacts, and Business Accounts can be Campaign Members.

B. The Marketing User feature license must be assigned.

C. The Campaign ID is required in the import file.

D. The Status of the Campaign Member is optional.

ANSWER: B C

Explanation:

The Marketing User feature license must be assigned because campaign management and campaign-member operations are controlled by marketing-user access in addition to the object permissions granted to the importing user. The consultant should confirm that the user or integration identity used for the migration has the required marketing capability before loading records. This ensures the migration process can create the Campaign Member relationships and supports appropriate ongoing campaign administration after the data load.

The Campaign ID is required in the import file because each Campaign Member record must be related to a specific Campaign. When loading Campaign Member records through an API-based tool such as Data Loader, the CampaignId field identifies the parent campaign for every imported member. The import also needs the appropriate member identifier for the Lead or Contact being associated, but the campaign relationship itself is fundamental to the Campaign Member record. Including the Salesforce Campaign ID in the source file allows the migration to reliably associate legacy membership data with the intended Salesforce campaign. Salesforce documents Campaign Member as the junction-style record that relates a campaign to an individual member, including its required campaign relationship: CampaignMember Object Reference. See also Salesforce guidance on campaign access and setup: Campaigns.

QUESTION NO: 33

Cloud Kicks wants to route new Leads to different sales teams based on the Lead's Country value. The assigned sales rep should receive an email notification when a Lead is assigned.

Which solution should the consultant recommend?

A. Configure a Lead assignment rule with rule entries and an email template.

B. Create a territory assignment rule for Leads.

C. Create a workflow rule that changes the Lead owner.

D. Use Opportunity Teams to assign the appropriate sales rep.

ANSWER: A

Explanation:

Configure a Lead assignment rule with rule entries and an email template. Lead assignment rules evaluate new Leads against defined criteria and assign each Lead to the appropriate user or queue. Cloud Kicks can create rule entries based on Country and specify the applicable sales rep or sales queue as the assignee.

The consultant can also configure the assignment rule to send an email notification to the assigned user. This provides a declarative solution that standardizes lead routing and helps sales reps respond promptly to new prospects. See Salesforce Help on Lead Assignment Rules.

QUESTION NO: 34

A consultant is beginning a new project with Cloud Kicks to implement collaborative forecasting.

What should the consultant use to gather requirements using an Agile methodology?

A. Linear process

B. Quip spreadsheet

C. User stories

D. Forecast hierarchy

ANSWER: C

Explanation:

User stories are the appropriate Agile technique for gathering and documenting requirements for a collaborative forecasting implementation. A user story captures a requirement from the perspective of the person who will use the capability, generally describing who needs something, what they need to accomplish, and the expected business value. For example, a sales manager might need to submit an adjusted forecast so that the organization can produce a more accurate rollup. This format keeps discussions focused on user outcomes rather than prematurely prescribing a technical configuration.

During discovery, the consultant can work with sales leadership, managers, operations teams, and representatives to identify stories, clarify acceptance criteria, prioritize the backlog, and refine requirements over successive iterations. This is especially useful for collaborative forecasting because the design can involve forecast types, quotas, adjustments, hierarchy behavior, submission processes, and reporting needs that should be validated with stakeholders as the solution is developed. Salesforce describes user stories as a way to express requirements and notes their role in an Agile backlog. See Salesforce Trailhead: User Stories and Salesforce Trailhead: The Product Backlog.

QUESTION NO: 35

The VP of sales at Cloud Kicks wants to provide options to sales reps for changing account or contract details for a created order.

Which two conditions should the consultant consider to meet this requirement'

Choose 2 answers

A. The order associated with the account should be in draft status.

B. The price book associated with the order is associated with the new account.

C. The currency associated with the order can be different from the new contract.

D. The contract associated with the order is associated with the new account.

ANSWER: A D

Explanation:

A created order can be reassigned or have its contract relationship updated only while it remains editable. Therefore, **The order associated with the account should be in draft status.** is required. Draft is the working status for an order, allowing sales users to revise order header information, such as the account and contract, before the order is activated and becomes a committed record in the fulfillment process.

The contract associated with the order is associated with the new account. is also required because an order's contract must be valid for the account on that order. When a representative changes the order account, the selected contract must belong to that newly selected account so that the commercial agreement, entitlement context, and order relationship remain consistent. This relationship prevents a sales user from applying a contract negotiated for one customer to an order owned by another customer.

These requirements support a controlled order-management process: users can make corrections before activation, while Salesforce preserves the integrity of the Account, Contract, and Order record relationships. See Salesforce's Order object reference and Contract object reference for the standard record relationships and fields.

QUESTION NO: 36

The VP of Sales at Cloud Kicks wants to provide options to sales representatives for changing account or contract details for a created order.

Which two conditions should the consultant consider to meet this requirement? (Choose two.)

A. The price book associated with the order is also associated to the new account.

B. The contract associated with the order is also associated to the new account.

C. The currency associated with the order can be different from the new contract.

D. The order associated with the account should be in draft status.

ANSWER: B D

Explanation:

Salesforce permits users to change the Account or Contract on an existing order only while that order remains in Draft status. Draft is the editable stage of the order lifecycle, allowing sales representatives to correct or update key header-level information before the order is activated and used in downstream fulfillment or contracting processes. Therefore, the condition that the order associated with the account should be in draft status is required.

When an order has a Contract and the Account on the order is changed, the related Contract must also belong to the newly selected Account. This preserves the required relationship consistency among the order, its customer account, and the contractual agreement governing that order. Sales teams should therefore ensure that the contract associated with the order is also associated to the new account before saving the account change. These conditions support accurate account ownership and contract association while retaining a valid editable order record. See Salesforce's Edit Orders documentation and the Order object reference.

QUESTION NO: 37

Cloud Kicks has purchased a list of leads and wants sales reps to contact and measure

the return on investment (ROI) of the purchased list.

Which solution should the consultant recommend?

A. Create a Campaign, import the list as Leads, and add them to the Campaign.

B. Import the list as new Leads and update the Lead Source to "Purchased Lead.

C. Create a new custom object to import purchased Leads,

D. Import the list as new Leads using the Data Import Wizard.

ANSWER: A

Explanation:

Create a Campaign, import the list as Leads, and add them to the Campaign. This gives Cloud Kicks a dedicated campaign record representing the purchased list and links every imported lead through Campaign Member records. Sales reps can work the leads normally while the business tracks member statuses, such as Sent, Responded, or Contacted, to measure engagement with that specific list. As leads are converted and related opportunities progress, Salesforce Campaign Influence and campaign reporting can associate opportunity value with the campaign. This enables ROI reporting using the campaign's cost fields alongside attributed revenue, providing a consistent way to evaluate whether the list generated enough pipeline or closed business to justify its purchase cost. Campaigns are Salesforce's standard mechanism for organizing a marketing initiative or lead source cohort and measuring its members, responses, and resulting business impact. Salesforce documentation describes adding leads and contacts as campaign members and using campaign metrics to evaluate effectiveness. See Salesforce Campaigns and Salesforce Campaign Members.

QUESTION NO: 38

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: C D

Explanation:

A required field and **a validation rule** are the appropriate controls for ensuring that users provide essential lead information. A required field prevents a user from saving the lead record until a value is entered. For custom fields, this can be configured at the field definition level, and fields can also be made required on the relevant page layout to guide users during manual record entry. This is effective for information that must always be collected.

A validation rule provides more flexible enforcement when whether a field must be populated depends on other lead data, such as lead source, status, country, or another business condition. The rule evaluates when the record is saved and displays an error message if the required information is absent under the defined circumstances. Using required fields for universally mandatory data and validation rules for conditional requirements ensures that lead data is complete and usable by marketing while supporting the organization's business process. Salesforce documents required-field behavior and configuration in its field definition guidance, and describes conditional data-quality enforcement in its validation rule documentation.

QUESTION NO: 39

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: A B

Explanation:

Manually assign a product-specific role to each product engineer and create criteria-based opportunity sharing rules for each product line provide a scalable declarative solution for this access requirement. The consultant can place each product engineer in a role that represents the product line or engineering access group they support. A criteria-based sharing rule can then evaluate a product-line value stored on the Opportunity and share records matching that value with the corresponding role. The sharing rule's access level can be set to Read Only, giving engineers visibility without permitting them to edit sales information.

Criteria-based sharing rules are recalculated by Salesforce as records meet or cease to meet the defined criteria. Consequently, when a new Opportunity is created with the relevant product-line value, the engineer in the designated role receives the intended access automatically, without requiring the sales rep to manually share the record. This approach also centralizes ongoing administration: when engineering coverage changes, an administrator can update a user's role rather than revisiting individual Opportunity records. Salesforce documents that criteria-based sharing rules extend record access based on field values and can share with roles, roles and subordinates, or public groups. See Salesforce Help: Criteria-Based Sharing Rules and Salesforce Help: Roles.

QUESTION NO: 40

During the Discovery phase of a Sales Cloud implementation, which step should a consultant complete to prepare for a successful engagement?

A. Set project milestones.

B. Create the implementation plan

C. Define sales processes

ANSWER: C

Explanation:

Define sales processes is the appropriate Discovery-phase activity because the consultant must first understand how the customer qualifies leads, manages opportunities, progresses deals through stages, assigns ownership, forecasts revenue, and records key sales information. This discovery work translates the organization's business process into requirements for Sales Cloud configuration, including opportunity sales processes, record types, page layouts, validation rules, automation, pipeline reporting, and forecasting. It also helps the consultant identify where different teams or products require distinct stages or guidance.

Documenting the sales process early creates a shared understanding between business stakeholders, sales leadership, and the implementation team. That alignment is essential before detailed solution design and configuration begin, because Salesforce should support the customer's agreed future-state process rather than simply replicate undocumented or inconsistent practices. Salesforce's guidance on opportunity stages emphasizes that sales processes define the stages available to users and can be tailored for different business needs. See Salesforce Help: Customize Sales Processes and Trailhead: Manage Opportunities.

QUESTION NO: 41

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: C D

Explanation:

Cloud Kicks should use **three record types** and **three sets of opportunity stages** to represent its three distinct product-line sales methodologies. In Salesforce, Opportunity record types can be associated with different sales processes. A sales process controls the Opportunity Stage values available to users, so it is the appropriate mechanism for ensuring that each product line follows its own defined path through the sales cycle.

Each product line can therefore have a dedicated record type and a corresponding sales process containing only the stages applicable to that methodology. Stages that are common across product lines can be included in more than one sales process. This supports the shared portions of the processes without forcing every sales team to view irrelevant stages or compromising the unique workflow required for another product line. Record types can also support product-line-specific page layouts, picklist behavior, and user experience where needed.

Salesforce describes sales processes as the configuration that determines the stages available for Opportunities, while record types associate users and business processes with appropriate page layouts and picklist values. See Salesforce Trailhead: Record Types and Salesforce Help: Define Sales Processes.

QUESTION NO: 42

Cloud Kicks uses Salesforce to manage business Accounts and Person Accounts. The sales director wants to associate Person Accounts to business Accounts and/or Contacts.

Which approach should the consultant recommend to meet these requirements?

A. Use the Contacts to Multiple Accounts feature.

B. Create a junction object between Account and Contact.

C. Create a custom lookup from Account to Contact.

ANSWER: C

Explanation:

Create a custom lookup from Account to Contact. Person Accounts are specialized Account records that also have an underlying Contact record, but their relationship requirements often differ from the standard business-account/contact model. A custom lookup provides a deliberate, visible association that the organization can tailor to its sales process, page layouts, security model, reporting needs, and automation. For example, the lookup can be placed on the Person Account record so users can select the relevant business Contact; that Contact's parent business Account provides the business context for the relationship. Where a direct association to a business Account is also required, the consultant can similarly use a purpose-built custom relationship on the Account object and clearly label each relationship for users.

This approach is appropriate because custom relationship fields let Salesforce administrators model business-specific associations without relying on the standard Account Contact Relationship behavior. The relationship can be made optional or required, populated through Flow, and exposed in reports and list views as needed. Salesforce documents how lookup relationships connect records and support relationship-based data modeling in Lookup Relationships. Salesforce also describes the special Account-and-Contact structure of Person Accounts in Person Accounts.

QUESTION NO: 43

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

Explanation:

Customize Path and create validation rules dependent on stages. is the appropriate recommendation because it combines user guidance with enforceable data-quality controls. Opportunity Path can present the relevant key fields and stage-specific guidance directly in the sales representative's workflow, making it clear which information managers expect as an opportunity progresses. The consultant can configure Path to surface the fields most relevant to each stage and provide concise guidance for completing that stage successfully.

Validation rules then ensure the data is actually entered before a representative can save an opportunity at a given stage. A stage-dependent validation rule uses conditions based on the opportunity's Stage field and checks whether the required field values are blank or otherwise incomplete. This prevents an opportunity from advancing or being saved in a stage until the expected information is present. Consequently, reports that group or filter opportunities by stage have the required underlying data, producing consistently complete stage reporting. Salesforce describes Path as a way to highlight key fields and provide guidance for success, while validation rules evaluate data at save time and prevent records from being saved when requirements are not met. See Salesforce Path Overview and Salesforce Validation Rules.

QUESTION NO: 44

Which two solutions should a consultant recommend if a sales process requires opportunities to have associated product line items before moving the opportunity to the negotiation stage? (Choose two.)

A. Configure a validation rule that tests the Has Line Item and Stage fields for the correct condition.

B. Ensure that all sales representatives have access to at least one PriceBook when creating product lines.

C. Define a workflow rule that automatically defaults to a PriceBook and product line item when selecting the negotiation stage.

D. Configure the opportunity record types to enforce product line item entry before selecting the negotiation stage.

ANSWER: A B

Explanation:

Configure a validation rule that tests the Has Line Item and Stage fields for the correct condition. Salesforce opportunities expose the standard `HasOpportunityLineItem` field, which indicates whether the opportunity has at least one associated opportunity product. A validation rule can evaluate that field together with the proposed stage value and prevent users from saving an opportunity in Negotiation when no line item exists. This provides consistent enforcement regardless of whether users change the stage through the record page, inline editing, imports, integrations, or automation that performs standard record updates. Salesforce documents opportunity fields, including product-related fields, in its Opportunity object reference.

Ensure that all sales representatives have access to at least one PriceBook when creating product lines. Opportunity products are selected from price book entries, so users need access to an appropriate price book to add the required products and prices to their opportunities. Providing access to an active, usable price book makes the required sales behavior operationally achievable before the stage restriction is encountered. This complements the validation rule: the price book enables line-item creation, while the validation rule enforces the process requirement. Salesforce's Products and Price Books documentation describes how price books supply product pricing for sales records.

QUESTION NO: 45

What are two considerations for enabling multiple currencies at Cloud Kicks? Choose 2 answers

A. The primary currency is automatically displayed in parentheses when using multi-currency.

B. Accounts, Opportunities, Leads, Cases, and Opportunity Product Schedules support multi-currency reporting.

C. When multi-currency is enabled, changes to exchange rates update the converted amount on all records except closed opportunities.

D. The multi-currency enablement process is irreversible.

ANSWER: C D

Explanation:

"When multi-currency is enabled, changes to exchange rates update the converted amount on all records except closed opportunities." is a key operational consideration. Salesforce uses exchange rates to calculate converted values, so updating a rate can change the converted amounts used across applicable records. Closed opportunities are treated differently because their converted values are preserved, protecting historical reporting and preventing a later currency-rate update from altering the value associated with a completed sale. Administrators should therefore establish an exchange-rate governance process before making changes, especially when reports compare current pipeline with historical performance.

"The multi-currency enablement process is irreversible." is also correct. Enabling multiple currencies is an organization-level setting with broad effects on currency fields, exchange-rate management, reporting, and data behavior. Salesforce does not provide a self-service way to turn off multiple currencies after it has been enabled. Cloud Kicks should consequently confirm its corporate currency, required active currencies, reporting needs, and ownership of exchange-rate maintenance before activation. Salesforce's guidance on currency setup and management is available in Salesforce Help: Manage Currencies and the Salesforce Trailhead currency implementation module.

QUESTION NO: 46

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

What should the consultant recommend to the project manager?

A. Bring additional resources from the consulting firm to the project.

B. Confirm that the statement of work (SOW) Is realistic.

C. Revisit the communication plan and set up more frequent check-ins.

ANSWER: C

Explanation:

Revisit the communication plan and set up more frequent check-ins. is the appropriate recommendation because recurring missed meetings and late deliverables indicate that the project's existing communication and governance approach is not keeping stakeholders aligned. The project manager should use the communication plan to clarify meeting cadence, required attendees, channels for status reporting, escalation paths, decision ownership, and expectations for identifying risks or blockers early. More frequent, focused check-ins create a regular opportunity to confirm progress against milestones, surface dependencies, resolve issues, and establish accountability for committed actions. The consultant should help ensure that these check-ins are purposeful and that outcomes, owners, and due dates are documented and shared with the relevant team members. This intervention addresses the immediate project-health symptoms while reinforcing the stakeholder engagement practices needed for successful Salesforce delivery. Salesforce recommends defining project roles, responsibilities, and communication practices as part of implementation planning so the project team can collaborate effectively throughout the lifecycle. See Salesforce's Manage Your Project guidance and the Plan Your Project module for related implementation-planning practices.

QUESTION NO: 47

Cloud Kicks rolled out Sales Cloud recently. The VP of sales wants to display a view of internal and external data on the lifetime spend for each

account on the Salesforce account detail page.

Which option should a consultant recommend to meet this requirement?

A. Salesforce Data Pipelines

B. Einstein Discovery

C. Sales Engagement

ANSWER: A

Explanation:

Salesforce Data Pipelines is the appropriate recommendation because it is designed to bring together data from multiple sources, apply transformations, and load the resulting data into Salesforce for business use. Cloud Kicks can use a pipeline to combine internal Salesforce information, such as order or opportunity-related data, with external spend data from supported sources. The pipeline can standardize and aggregate those records into a lifetime-spend value associated with each account.

Once the consolidated data is available in Salesforce, the organization can expose the resulting lifetime-spend information on the Account record page through appropriate account fields and page layout or Lightning record page configuration. This gives sales users a consistent, account-level view without requiring them to manually reconcile information across systems. Data Pipelines are particularly useful when the data requires scheduled ingestion, cleansing, joining, or aggregation before it can be used in CRM.

Salesforce describes Data Pipelines as a tool for extracting, transforming, and loading data across supported sources and destinations. See Salesforce Help: Data Pipelines and Salesforce Help: Data Pipeline Transforms.

QUESTION NO: 48

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: C D

Explanation:

The data update will cause sharing recalculations and should be completed during off-peak hours because changing the owner of a large number of Accounts can substantially affect record access. With private Account access, Salesforce must reevaluate sharing derived from ownership, roles, territories, account teams, and sharing rules as ownership changes. At a volume of 400,000 records, this processing can consume significant system resources and can also contend with normal user activity. Scheduling the ownership realignment for off-peak hours reduces the operational impact while sharing access is being recalculated.

The team can defer sharing calculations to decrease the risk of lock errors during the data update. Deferred sharing maintenance lets an administrator postpone sharing recalculations while a large ownership or territory-related change is in progress, then resume calculations after the bulk update finishes. This approach reduces repeated recalculation work during the load and helps limit record-locking contention caused by concurrent updates to sharing-related records. The consultant should plan the update, enable deferral where appropriate, complete the ownership changes in controlled batches, and resume sharing calculations afterward so access is fully reconciled. Salesforce documents the approach in its Manage Sharing for Large Data Volumes guidance and its Deferred Sharing Maintenance documentation.

QUESTION NO: 49

Universal Containers has automated the process of creating new account records in Salesforce. All account 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. Ensure that the generic user has NOT been assigned to a role.

B. Ensure that the generic user has the Modify All Data permission.

C. Contact Salesforce support to add an index to the account object.

D. Set the organization-wide defaults for accounts to public read/write.

ANSWER: A

Explanation:

Ensuring that the generic user has not been assigned to a role is the appropriate way to reduce the sharing-maintenance impact while retaining the existing integration and ownership model. This scenario is an example of ownership skew: a single user owns an exceptionally large number of records. When that owner is in the role hierarchy, Salesforce can need to evaluate and maintain access implied by the hierarchy when sharing settings or sharing rules change. With two million Account records under one owner, those recalculations can create substantial processing overhead and lead to slow performance.

A generic integration owner generally does not need a role when it is used only to create or own system-generated records. Removing the user from the role hierarchy limits the role-based sharing implications associated with that highly skewed ownership distribution. This is a targeted data-architecture mitigation that does not require modifying the automated process that creates Accounts. Salesforce's data-skew guidance specifically recommends avoiding assignment of users with very large record ownership to roles, because role hierarchy and sharing behavior can magnify the impact of ownership skew. See Salesforce's Data Skew architecture guidance and the Salesforce Data Skew documentation.

QUESTION NO: 50

Which two use cases will protect the integrity of order data with activation limitations?

Choose 2 answers

A. New Products can be added to active orders.

B. Products can be removed from active reduction orders.

C. Orders can be activated only if they include a Product.

D. Multiple reduction orders can be created for a single order.

ANSWER: C D

Explanation:

"Orders can be activated only if they include a Product." is correct because activation represents a committed order state. Requiring at least one order product prevents users from activating an empty transactional record, ensuring that an activated order has meaningful commercial data and associated line-level quantities, prices, and products. This activation prerequisite helps downstream fulfillment, billing, and reporting processes operate on complete order information.

"Multiple reduction orders can be created for a single order." is also correct. Once an order is activated, the original order data is protected from direct changes. Reduction orders provide a controlled, auditable mechanism for applying subsequent decreases or cancellations without overwriting the original committed transaction. More than one reduction can be needed when changes occur at different times or affect different products. Salesforce preserves integrity by tracking the reductions against the source order and preventing reductions beyond the available ordered quantities. This maintains a reliable historical record while supporting legitimate post-activation adjustments. See Salesforce's Orders documentation and reduction orders documentation for order activation and reduction-order behavior.

QUESTION NO: 51

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

A. Create implementation plan.

B. Establish project goals.

C. Define sales processes.

D. Define success metrics.

E. Set project milestones.

ANSWER: B C D

Explanation:

Establishing project goals, defining sales processes, and defining success metrics are core Discovery activities because they create the business context that guides all subsequent Salesforce design and delivery decisions. Project goals document the business outcomes the customer expects, such as improving pipeline visibility, increasing conversion, or shortening sales cycles. Defining the sales processes captures how sellers qualify, progress, collaborate on, and close opportunities; this information directly informs recommended Salesforce stages, fields, automation, reporting, and user experience. Defining success metrics converts the desired outcomes into measurable indicators, enabling the project team and stakeholders to evaluate adoption and business impact after release. Together, these activities align stakeholders on the intended future state, establish a shared vocabulary for requirements, and provide clear criteria for design decisions and validation. Salesforce's consultant preparation materials emphasize understanding a customer's business objectives, sales process, and measurable outcomes before proposing a solution. See Salesforce Trailhead's [Sales Cloud Consultant Certification Prep] and the [Sales Cloud Basics] module for Salesforce guidance on aligning Sales Cloud capabilities to customer sales processes and goals.

QUESTION NO: 52

Cloud Kicks has enabled territory forecasts to see how expected revenue compares between sales territories, and to determine which territory has dosed the most deals in a month. The territory hierarchy has three branches with child territories, where forecast managers may be assigned to a few of them.

Which two actions can forecast managers perform?

Choose 2 answers

A. Add territory forecast to the hierarchy.

B. Add a Forecasts tab to the Sales app.

C. View the territory forecasts as a single-page summary.

D. Share the forecast with any Salesforce user.

ANSWER: C D

Explanation:

Forecast managers can **view the territory forecasts as a single-page summary**. Territory Forecasts provides a consolidated view that lets a manager compare forecast information across the territories they manage and the child territories beneath them in the forecast hierarchy. This supports rollup analysis of expected revenue and pipeline performance without requiring the manager to open each territory separately.

Forecast managers can also **share the forecast with any Salesforce user**. Sharing a territory forecast gives other users visibility into the forecast data for collaboration and review. The forecast manager's ability to share is part of the Territory Forecasts experience and is distinct from administrative configuration of the territory hierarchy or application navigation. Salesforce describes territory forecasts as a way to forecast by territory hierarchy, with forecast managers reviewing their assigned territory data and its rollups. See Salesforce's [Territory Forecasts documentation] and the [Territory Forecasts Trailhead module] for the territory-forecast hierarchy, forecast-manager capabilities, and sharing workflow.

QUESTION NO: 53

Universal Containers (UC) has acquired another company that uses Sales Cloud and is migrating its legacy data, email alerts, and approval processes.

Which steps should the consultant perform to maintain data integrity?

A. Use the Sales Cloud clone feature to migrate email alerts and approval processes into UC ' s Sales Cloud org.

B. Merge data from the existing Sales Cloud org into UC ' s Sales Cloud org, migrate email alerts, approval processes, and then users.

C. Insert users and migrate email alerts and approval processes into UC ' s Sales Cloud org.

ANSWER: C

Explanation:

Insert users and migrate email alerts and approval processes into UC ' s Sales Cloud org. is correct because user records must exist in the destination org before process automation that relies on user identities is configured and activated.

Approval processes can specify users, queues, and roles as approvers, while email alerts identify recipients such as specific users or record owners. Establishing the appropriate users first allows the consultant to map the acquired company's people to valid destination-org users and ensure that workflow recipients and approval assignments resolve to the intended individuals. This sequencing also supports accurate ownership and auditability when the legacy business data is loaded, because records can be assigned to the proper active users rather than requiring later ownership corrections. In practice, the consultant should plan user provisioning, licenses, profiles, roles, and any required permission assignments before deploying the relevant automation metadata and loading records. Salesforce's Metadata API documentation identifies workflow metadata, including alerts, as deployable configuration, and Salesforce's data-migration guidance emphasizes planning dependencies and loading data in an appropriate order. See Salesforce Metadata API: Workflow and Salesforce Trailhead: Plan for Data Migration.

QUESTION NO: 54

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: C D E

Explanation:

Successful change and seasonal release management starts by collecting input from stakeholders. Stakeholders provide business context, identify operational dependencies, and help the team assess how planned enhancements will affect processes and users. This input supports an informed, user-centered release plan rather than treating a release as only a technical deployment.

Creating an org development model is also essential. A defined model establishes how changes move through development, testing, staging, and production environments. It promotes repeatable deployment practices, appropriate testing, governance, and clearer ownership for release activities. This is particularly important for Salesforce's regular seasonal releases and for managing concurrent enhancement work safely.

Communicating updates to end users prepares people for changed screens, processes, permissions, and expected behaviors before the release takes effect. Communications can include release summaries, targeted in-app guidance, office hours, and links to learning materials. Combined with stakeholder input and a structured development model, proactive communication reduces disruption and helps users realize value from delivered enhancements. Salesforce recommends reviewing release information and planning for release updates in advance; see Salesforce Help: Release Updates and Trailhead: Salesforce Releases and Maintenance.

QUESTION NO: 55

Cloud Kicks (CK) recently finished a redeployment of is Lightning pages. CK users report that Lightning pages are loading slowly CK management wants to consider the impact this has on adoption.

Which two toots should the consultant recommend that CK use to evaluate lightning pages?

Choose 2 answers

A. Guidance for App Butter

B. Lightning usage App

C. Performance Analysis for App Builder

D. Real-Time Event Monitoring

ANSWER: B C

Explanation:

Lightning usage App is appropriate because it provides adoption and performance-focused metrics for Lightning Experience. A consultant can use it to identify how frequently users access Lightning pages, which pages are most used, and page-load-time trends. This gives Cloud Kicks evidence to connect a slow page experience with potential adoption concerns and helps focus optimization work on the pages that affect the greatest number of users. Salesforce describes the app and its available adoption metrics in its [Lightning Usage App documentation].

Performance Analysis for App Builder is also appropriate because it evaluates a specific Lightning record page's configuration in Lightning App Builder. It identifies performance issues associated with page components and provides actionable recommendations to improve page load behavior, such as reviewing component choices and the page's design. This makes it the page-level diagnostic companion to the broader usage data from the Lightning Usage App. Salesforce explains how to assess and improve page performance with [Performance Analysis for Lightning App Builder].

QUESTION NO: 56

Cloud Kicks needs to set sales quotas for all sales reps.

Which solution should the consultant consider?

A. Use the Data Import Wizard.

B. Enable Forecast Quotas from Setup.

C. Assign quota values by profile.

ANSWER: B

Explanation:

Enable Forecast Quotas from Setup. is the appropriate solution because Salesforce Forecasts supports quota management as part of collaborative forecasting. After Collaborative Forecasts is enabled and configured, an administrator can enable quotas in Forecasts Settings. Sales managers can then enter or adjust quota amounts for forecast users for each forecast period, allowing each sales representative's actual or forecasted pipeline performance to be evaluated against a defined target.

Quota values are maintained in the Forecasts area and can be set for the periods used by the organization's forecast configuration, such as monthly or quarterly periods. This gives management a consistent way to communicate targets, monitor attainment, and use forecast metrics to assess progress toward sales goals. Forecast quotas are associated with forecast users and the applicable forecast hierarchy, which supports an organization-wide quota process while still allowing targets to differ by representative or team.

Before quotas can be used, the consultant should ensure that Collaborative Forecasts is enabled, the appropriate forecast type and forecast periods are configured, and the relevant sales users are included in the forecast hierarchy. Salesforce's setup guidance for this capability is available in [Enable Forecast Quotas] and [Collaborative Forecasts Overview].

QUESTION NO: 57

Management at Northern Trail Outfitters 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. Build a custom forecast report showing product groups.

B. Implement Collaborative Forecasting with quota attainment.

C. Build a forecast list view by product family group.

D. Implement Collaborative Forecasting with product family.

ANSWER: B D

Explanation:

Northern Trail Outfitters should use Collaborative Forecasts because it provides a structured forecasting experience that summarizes pipeline and forecast amounts for users within the forecast hierarchy. This enables management to view forecast information across sales representatives, including rollups through the organizational hierarchy. Implementing Collaborative Forecasting with quota attainment adds quotas to the forecasting process, allowing managers and representatives to assess forecast performance in the context of assigned targets and attainment.

Implementing Collaborative Forecasting with product family supplies the required product-level forecasting dimension. A product-family forecast type organizes forecast amounts by the product families associated with opportunity products, so management can review forecasts across multiple product groups rather than only as a single overall sales forecast. Salesforce supports enabling more than one forecast type, which lets the organization use both quota-oriented forecasting and product-family forecasting to provide the requested views. The forecast hierarchy and forecasting settings should be configured so the appropriate managers can access their teams' forecast data. See Salesforce's Collaborative Forecasts overview and product family forecasting documentation.

QUESTION NO: 58

Northern Trail Outfitters (NTO) has completed its annual planning and wants to

update the territory assignments for all sales reps in its enterprise. NTO understands this can impact the current year closing due by the end of the quarter. The IT team is also planning a release of the new incentive management package that will be used by sales reps.

Which two considerations should the consultant consider when deciding on the timing of the release?

Choose 2 answers

A. Testing changes to Territory Management and the incentive management package should be completed in a Full Sandbox before releasing to Production.

B. Changes to Territory Management need to be made in Production directly and can be completed without impacting users.

C. Installing a new incentive management package along with Territory Management changes may add high risk to the deployment.

D. Combining the Territory Management changes, and the incentive management package allows for mi faster ramp-up time for users.

ANSWER: A C

Explanation:

Testing changes to Territory Management and the incentive management package should be completed in a Full Sandbox before releasing to Production. A Full sandbox provides a production-like environment with complete data and metadata, enabling NTO to validate territory assignment behavior, user access, integrations, incentive calculations, and end-to-end sales processes before affecting active sellers. Because territory changes can alter account ownership, account access, forecasting context, and the work queues of a large sales organization, testing and business-user acceptance should be completed before the production deployment window. Salesforce describes Full sandboxes as intended for testing and staging and notes that they include all production data and metadata: Salesforce Sandbox Types.

Installing a new incentive management package along with Territory Management changes may add high risk to the deployment. Both changes can affect the same users and core selling processes at a sensitive time near quarter close.

Deploying them together makes it harder to isolate issues, validate business outcomes, train users, and recover quickly if a problem occurs. A consultant should assess whether a phased release, separate deployment windows, and a tested rollback plan reduce operational risk. Salesforce's guidance for Enterprise Territory Management emphasizes planning territory models and assignments carefully before activation: Enterprise Territory Management Overview.

QUESTION NO: 59

Northern Trail Outfitters has its sales support team enter new prospecting leads for sales representatives.

Which three actions should be implemented to enforce data quality and accuracy once the new lead has been qualified and the opportunity has been created to track the deal? (Choose three.)

A. Create an Apex trigger to perform data quality checks.

B. Enable validation rules on the lead.

C. Map custom lead fields to corresponding custom opportunity fields.

D. Enable the lead conversion permission.

E. Enable validation rules on the opportunity.

ANSWER: B C E

Explanation:

Implementing validation rules on the lead, mapping custom lead fields to corresponding custom opportunity fields, and enabling validation rules on the opportunity provides declarative, maintainable data-quality controls throughout the lead-to-opportunity lifecycle. Lead validation rules ensure that prospecting records contain required, correctly formatted, and internally consistent information before they are progressed. For example, a business can require key qualification details or ensure that values meet an approved format.

Custom lead-field mapping preserves important qualification data during conversion by transferring it to the corresponding opportunity fields. This prevents users from having to re-enter information and maintains continuity between the prospect record and the deal record. Validation rules on the opportunity then enforce that the deal has complete and accurate information when opportunity users create or update it, such as requiring fields needed for forecasting, sales-stage progression, or reporting.

Together, these controls apply data-quality standards at entry, preserve qualified data during conversion, and govern the ongoing opportunity record. Salesforce recommends validation rules for enforcing record criteria and supports mapping custom lead fields to account, contact, and opportunity fields during lead conversion. See Salesforce Trailhead: Validation Rules and Salesforce Help: Map Custom Lead Fields for Lead Conversion.

QUESTION NO: 60

Cloud Kicks noticed its data quality has degraded since its initial Sales 'Cloud Hs ion and is working with a co to ip a data management plan. The consultant suggested some best practices for creating, processing, and maintaining data.

Which two areas could be improved by using third-party data enrichment tools?

Choose 2 answers

A. Roles and record ownership

B. Validation rules

C. Monitoring changes and updates

D. Naming and formatting

ANSWER: C D

Explanation:

Third-party data enrichment tools can improve **Monitoring changes and updates** by routinely comparing Salesforce records with external data sources and supplying updated business details, such as company attributes, contact information, or account changes. This helps keep CRM data current after the initial data-load or implementation period, rather than relying entirely on users to identify and update outdated records. Enrichment providers may also flag data that has become stale and automate refresh processes through integrations.

Naming and formatting is also a key enrichment and data-cleansing use case. External tools can standardize values to consistent conventions, normalize company and contact details, and improve completeness and consistency across records. For example, an enrichment process may normalize organization names, addresses, phone numbers, industry values, and other attributes so that reporting, matching, segmentation, and sales processes operate on more reliable data. Salesforce identifies data standardization and enrichment as practical methods for improving overall data quality, while its duplicate-management capabilities can complement these processes within the platform.

See Salesforce guidance on data quality and Trailhead's overview of cleaning data.

QUESTION NO: 61

Cloud Kicks uses channel partners for selling and servicing its "Shoe of the Month" club. As the number of Leads has increased, Cloud Kicks has seen a decrease in partner satisfaction regarding the quality of Leads, and a noticeable decrease in the Lead conversion rate.

What can be done to increase partner satisfaction with the Leads being shared?

A. Configure Einstein Insights prior to Leads routing to the partner channel.

B. Utilize the Partner Lead Validator to populate a Lead score and assign to a partner channel queue.

C. Configure a cross-object validation rule to ensure that all fields on the Lead record are populated with data.

D. Utilize the Lead score on the Find Duplicate button, and then assign the Leads with a score in the high category.

E. Configure a custom lead score field to assess Lead quality, then assign the Leads that exceed this score to partners.

ANSWER: E

Explanation:

Configuring a custom lead score field to assess Lead quality, then assigning the Leads that exceed this score to partners is the appropriate approach because it creates an explicit, repeatable qualification threshold before a lead enters the partner channel. Cloud Kicks can define the score using factors that indicate purchase intent and fit for the Shoe of the Month club, such as engagement with campaign content, location, stated interest, demographic attributes, or prior interactions. Automation such as a record-triggered flow can calculate or update the score as lead data changes, while assignment rules or Flow can route only leads at or above the agreed threshold to the appropriate partner queue or partner owner. This helps partners spend their time on leads with stronger conversion potential, establishes a transparent standard for shared-lead quality, and provides a measurable basis for refining scoring criteria over time based on conversion outcomes. Salesforce supports lead assignment rules to automatically assign leads based on defined criteria, and its lead-management guidance emphasizes qualifying and prioritizing leads to improve sales follow-up. See Salesforce Help: Lead Assignment Rules and Trailhead: Qualify Leads.