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Consumer Goods Cloud: Trade Promotion Management Accredited Professional

Salesforce AP-205

Version Demo

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QUESTION NO: 1

A consultant needs to configure the Volume Only promotions so that the key account manager (KAM) can see the Volume Planning card (VPC).

Where should the consultant configure this to see the VPC?

A. In the tactic template

B. In the KPI subset

C. In the promotion template

ANSWER: C

Explanation:

In the promotion template is correct because the promotion template controls the business configuration and user experience that applies when a trade promotion is created from that template. For a Volume Only promotion, the template is where a consultant enables the Volume Planning card and associates the configuration needed for users, including key account managers, to access volume-planning functionality in the promotion workspace. This makes the card available consistently for promotions created under the applicable template, rather than relying on an individual tactic or a KPI-display selection. Promotion templates provide the reusable framework for promotion types, layouts, and enabled planning capabilities, so they are the appropriate configuration point for a requirement that applies to Volume Only promotions. The consultant should therefore update the relevant Volume Only promotion template, ensure the Volume Planning card is enabled in its setup, and use that template when creating the promotion. Salesforce Consumer Goods Cloud documentation and learning resources describe trade-promotion configuration and template-driven planning experiences; see Salesforce Help and Salesforce Trailhead: Consumer Goods Cloud.

QUESTION NO: 2

A system administrator in Ursa Major Solar wants to load Sell through volume of a customer in data processing engine for read as a key performance indicator (KPI).

Which permission set license should a consultant recommend assigning so that the system administrator is able to load the data?

A. Lightning Trade Promotion Management Psl

B. CGC Retail and Trade Promotion Management Psl

C. CGC Processing Services Register

ANSWER: C

Explanation:

CGC Processing Services Register is the required permission set license because the task involves registering and loading sell-through-volume data through Consumer Goods Cloud Processing Services for use by the Data Processing Engine. In Trade Promotion Management, sell-through data can be brought into the processing layer and made available as an input to KPI calculations. This requires access to the processing-service registration and data-loading capabilities, rather than only access to the Trade Promotion Management user interface or its business records.

Assigning this license enables the administrator to work with the Consumer Goods Cloud processing functionality that supports ingestion and registration of the data needed by downstream calculations. Once the sell-through volume is loaded and mapped appropriately, the KPI framework can consume the processed data in promotion planning and performance analysis. This separation is important because Consumer Goods Cloud licenses and permission set licenses grant access to distinct functional areas; access to promotion-management features alone does not necessarily grant the processing-service privileges needed to load a KPI source.

For product context, see [Salesforce Consumer Goods Cloud] and Salesforce's [documentation on user license types].

QUESTION NO: 3

Cloud Kicks is planning promotions for planning accounts, including different formats like Hypermarkets, Supermarkets, Convenience, and Online. To which object should the data of these formats be interfaced?

A. Customer Trade Org Hierarchy with Relationship Type Sub Account

B. Customer Relationship with Relationship Type Sub Account

C. Sub Account with timeframe Valid From and Valid Thru

ANSWER: B

Explanation:

Customer Relationship with Relationship Type Sub Account is the correct integration target because Consumer Goods Cloud Trade Promotion Management distinguishes the account used for planning from the customer formats that contribute to the planned business. A planning account can represent the overall retailer, while Hypermarkets, Supermarkets, Convenience, and Online represent distinct subordinate customer formats with their own commercial characteristics, historical performance, and promotion-relevant volumes.

Creating Customer Relationship records with the relationship type set to Sub Account establishes the required association between the planning account and each format account. This relationship structure enables TPM to identify the accounts that belong beneath a planning customer and use their relevant data when planning and evaluating promotions. It supports planning at the appropriate customer level while preserving the business relationship needed for aggregating format-level information to the planning-account context.

This is particularly useful when one retailer operates multiple channels or formats that must remain distinguishable for promotion planning, baselines, and volume analysis. Salesforce Consumer Goods Cloud provides the account and relationship model used to represent customer hierarchies and related commercial entities; see Salesforce's [Consumer Goods Cloud documentation] and the [Consumer Goods Cloud for Retail Execution Trailhead module].

QUESTION NO: 4

A client wants to define the funds available to spend based on the revenue planned for a customer.

Which information does a consultant need to collect from the client to understand if this can be fulfilled with the TPM Funds functionality?

A. The fund templates to which revenue-based funding will apply

B. The tactic conditions to which revenue-based funding will apply

C. The promotions to which revenue-based funding will apply

ANSWER: A

Explanation:

The fund templates to which revenue-based funding will apply is the information the consultant needs because the fund template defines the fund's core setup and calculation behavior. To make spendable funds depend on planned customer revenue, the consultant must first identify the relevant fund types or funding buckets the business uses—for example, a customer-development fund, a marketing allowance, or a promotional accrual fund. That information determines where a revenue-based funding rule must be configured.

With the applicable templates identified, the consultant can establish a rate-based approach that uses a revenue measure as the basis for calculating available funds. The organization can then define the relevant percentage or rate and align the template to the planned-revenue information used in its trade-promotion process. As planned revenue changes, the funding calculation can reflect that revenue basis according to the configured template and business rules. This makes the template-level requirement essential for determining both feasibility and the required configuration scope.

Salesforce positions Trade Promotion Management as a capability for planning promotions, managing trade spend, and improving control over promotional investment. See Salesforce's [Trade Promotion Management overview]() and the official [Salesforce Help search for TPM funds]().

QUESTION NO: 5

In the Account Plan P&L key performance indicators (KPIs) Requirement, the design of the Latest Estimate KPI is all past periods and should show actual values, while current and all future periods should show planned values.

How should a consultant recommend building this in the KPI formula to determine past, current, and future weeks?

A. Use an available calcHelper function.

B. Use the standard Salesforce formula function PREVGROUPVAL.

C. Use the existing planned values if actual values are 0.

ANSWER: A

Explanation:

Use an available calcHelper function. The Latest Estimate requirement is a time-phased KPI calculation: it must evaluate each displayed week relative to the current processing period, select actuals for completed periods, and select planned values for the current and remaining periods. A calcHelper is designed to support this kind of period-aware logic within Consumer Goods Cloud Trade Promotion Management KPI calculations. It can identify the relevant time position or current period context and apply the appropriate actual-versus-plan selection consistently across the account plan P&L grid.

This approach keeps the KPI dynamic. As the current week advances, periods that have become historical automatically resolve to actual values, while the active and future periods continue to use planned values. The consultant therefore configures the rule once rather than maintaining separate formulas or manually changing data-source behavior each week. This also supports a consistent Latest Estimate view for users reviewing promotion and account-plan financial performance, because the measure always reflects the current boundary between realized and planned performance. Salesforce positions Trade Promotion Management as part of Consumer Goods Cloud capabilities for planning, executing, and measuring trade investments; see the [Salesforce Consumer Goods Cloud overview]() and the [Salesforce Help documentation portal]().

QUESTION NO: 6

A key account manager (KAM) is planning a promotion that includes a shipper product. The commercial team needs the promotion volume to be entered for the shipper, while revenue must be calculated for each component product included in the shipper.

Which bill of material (BOM) scope should a consultant use for the revenue key performance indicator (KPI)?

A. Parent

B. Component

C. No BOM scope

ANSWER: B

Explanation:

Component is correct because the requirement is to calculate revenue for each product that makes up the shipper, rather than for the shipper as the parent product. A Component BOM scope evaluates the KPI at the component-product level.

Using a BOM scope that evaluates the parent product would retain the calculation at the shipper level and would not provide the required component-level revenue result. The KPI can therefore use the promotion's shipper volume while applying the revenue calculation to its underlying components.

QUESTION NO: 7

A manufacturer receives a weekly baseline of 140 units for Product A. A promotion runs for 10 consecutive calendar days. No weekday share profile is configured.

What baseline value should Trade Promotion Management use for the promotion period?

A. 140

B. 200

C. 280

ANSWER: B

Explanation:

200 is correct. Without a weekday share profile, TPM distributes the weekly baseline evenly across seven calendar days. The daily baseline is 140 divided by 7, which equals 20 units.

The promotion spans 10 days, so the baseline is 10 multiplied by 20, which equals 200. Using only one weekly value would omit three promotion days, while using two full weekly values would include days outside the promotion period.

QUESTION NO: 8

Cloud Kicks is using Consumer Goods Cloud TPM and wants to tailor the system for a key account manager (KAM). It needs to make sure that the KAM has access solely to products in the Beverages category for all customers.

Which approach should a consultant recommend to set up this specific access within Consumer Goods Cloud TPM?

A. Implement a sharing rule on the Product object that restricts the KAM's view to only products classified under the Beverages category.

B. Utilize Role-Based Permissions, assigning the KAM to a role that exclusively permits access to products in the Beverages category.

C. Configure user settings by assigning the Beverages category to the KAM through the product manager, ensuring the KAM's access is limited to products within this category.

ANSWER: C

Explanation:

Configure user settings by assigning the Beverages category to the KAM through the product manager, ensuring the KAM's access is limited to products within this category. This is the Consumer Goods Cloud Trade Promotion Management approach for defining the product scope that a particular user can work with in TPM. User settings let an administrator associate managed products, including product hierarchies or categories, with a user. Assigning the Beverages category therefore establishes the KAM's permitted product assortment across the TPM experience, regardless of which customer is being planned for.

This configuration is particularly appropriate when responsibility is based on a commercial portfolio, such as a beverage-focused KAM, rather than merely on general Salesforce record ownership or organizational role. TPM uses the user's configured managed-product scope to present relevant products in planning and promotion-management activities. The consultant should maintain the Beverages assignment in the KAM's TPM user settings and ensure the category is correctly represented in the product hierarchy used by the organization. Salesforce describes Consumer Goods Cloud capabilities and product-focused execution workflows at Salesforce Consumer Goods Cloud; administrators can also use Salesforce's official documentation landing page to access the Consumer Goods Cloud and TPM configuration guides at Salesforce Help.