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Salesforce AP-223

Version Demo

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QUESTION NO: 1

Universal Containers sell a product bundle named “Corporate IT Solutions”. One of the product options inside this bundle is named Hardware Firewall Universal Containers has a requirement where if the customer has purchased a hardware firewall in the past, the hardware firewall product option should be hidden while configuring the bundle.

The CPQ admin has created a product rule to handle this requirement. What should the evaluation event of the product rule be set to?

A. Always

B. Save

C. Load and Edit

D. Load.

ANSWER: D

Explanation:

Load. is the appropriate evaluation event because the requirement depends on whether the customer already purchased a Hardware Firewall before the current configuration session. Salesforce CPQ must evaluate that historical customer information as the configurator opens, then apply the product rule’s action to hide the relevant bundle option before the sales rep can view or select it.

A Load evaluation is designed for configuration logic that needs to establish the initial state of a bundle. In this case, the prior-purchase condition is already known when the configurator starts and ordinarily does not change while the user is configuring the quote. Evaluating at load therefore provides the intended immediate experience: eligible customers see the option, while customers with an existing hardware-firewall purchase do not see it.

Product rules can use conditions and actions to control bundle configuration behavior, including dynamically hiding product options. Configuring the rule for Load ensures that this behavior is applied at the point where CPQ renders the configuration interface, rather than after the user has begun making selections. See Salesforce Trailhead’s discussion of CPQ product rules and configuration logic in Configure Products with Product Rules and the Salesforce CPQ documentation overview at Product Rules.

QUESTION NO: 2

Choose 3 answers.

Universal Containers is rationalizing a product catalog that contains thousands of similar SKUs. Which three design decisions can reduce catalog complexity while retaining controlled selling options?

A. Use product attributes for supported variations of the same core offering

B. Use discount schedules for quantity-based pricing tiers

C. Use bundles and product options for commonly sold combinations

D. Create a separate product record for every serial-numbered item

E. Create a separate SKU for every customer-specific pricing exception

ANSWER: A B C

Explanation:

Configurable attributes can replace separate SKUs created only for supported product variations. Quantity-based discount schedules can replace products created solely for different volume price points. Bundles and product options can replace repeatedly created prepackaged combinations of products.

Serial numbers represent individual instances rather than reusable catalog variations. Creating a separate product for every potential customer-specific exception increases maintenance and should not be the standard catalog design approach.

QUESTION NO: 3

Universal Containers is beginning the process of SKU rationalization as part of their Revenue Cloud project. They have been advised that rationalizing their product catalog will reduce complexity and increase flexibility. Which three areas can they look to consolidate products?

A. Same product names with different attribute values

B. Same products with different serial numbers

C. Same product names with different bulk discount levels

D. Same product names with different Term length

E. Same product names commonly found in the same bundle

ANSWER: A C E

Explanation:

SKU rationalization means replacing product records that represent minor variations of the same commercial offering with reusable catalog capabilities. “Same product names with different attribute values” can be represented by a configurable product and product attributes or options. This retains one core SKU while allowing users to select supported variations during configuration, rather than maintaining a separate SKU for every possible combination.

“Same product names with different bulk discount levels” can be consolidated because quantity-based pricing can be maintained as tiered or volume pricing, including discount schedules where applicable. The catalog therefore maintains the product once while pricing responds to the quantity purchased. “Same product names commonly found in the same bundle” are candidates for a bundle structure: a parent bundle and its options can capture the packaged offering, required components, and configuration logic without creating redundant prepackaged product records for common combinations.

These approaches make the catalog easier to govern, support more consistent quoting, and allow changes to attributes, quantity pricing, and package composition without proliferating SKUs. Salesforce CPQ product configuration uses product options and features to model selectable bundle components, while discount schedules support quantity-based discounting. See Salesforce CPQ Product Options documentation and Salesforce CPQ Discount Schedules documentation.

QUESTION NO: 4 - (SIMULATION)

A Subscription-based company has a Revenue Cloud user story to replace their legacy system which states "As a Sales User, I need to see my active deals (including new and renewals opportunities) from the old system carried over to the new Salesforce CPQ system once we go-live".

What are the relevant objects that will store the extracted information from the legacy system? - A. Accounts, Opportunities, Quotes, Contracts, Products, Order Products

B. Accounts, Opportunities, Contracts, Subscriptions, Assets, Products

C. Accounts, Opportunities, Orders, Contracts, Order Products

D. Accounts, Opportunities, Quotes, Contracts, Subscriptions, Products

ANSWER: Check the explanation for the answer

Explanation:

Correct answer: D. Accounts, Opportunities, Quotes, Contracts, Subscriptions, Products

To carry active new-business and renewal deals into Salesforce CPQ, migrate the core customer, sales-process, and subscription-lifecycle records:

Accounts — customer records.
Opportunities — the active deals, including new and renewal opportunities.
Quotes — CPQ quote records associated with the opportunities.
Contracts — the contractual basis for existing customer subscriptions and renewals.
Subscriptions — active subscription-line records used by CPQ for renewal and amendment processing.
Products — catalog products referenced by quote lines and subscriptions.

Orders, Order Products, and Assets may be relevant in particular downstream fulfillment or asset-management implementations, but they are not the primary CPQ records needed to represent active CPQ deals and renewable subscriptions in this scenario.

QUESTION NO: 5

Choose 3 answers.

During detailed design, the customer requests changes to discount logic after the design document has been approved. Which three governance practices help the implementation team manage the request appropriately?

A. Document the requested change, rationale, and affected requirements

B. Assess the impact to scope, timeline, budget, design, and testing

C. Review the request through the agreed change-control process

D. Implement the change immediately because the detailed design phase is still active

E. Wait until UAT is complete before discussing the change with stakeholders

ANSWER: A B C

Explanation:

The request should be documented with its business rationale and affected requirements, assessed for scope, schedule, budget, technical, and testing impact, and reviewed through the agreed change-control process with the appropriate customer stakeholders. These practices provide traceability and ensure that delivery commitments are changed only through informed approval.

Implementing the change immediately, or waiting until UAT to discuss it, bypasses project governance and can introduce unplanned work, incomplete testing, and conflicting stakeholder expectations.

QUESTION NO: 6

Which usage summary field can be used as an external ID to simplify usage uploads after amendments?

A. Legal entity

B. invoice run

C. auto number

D. source

E. matching ID

ANSWER: E

Explanation:

matching ID is the appropriate field because it provides a durable identifier for associating incoming usage with the correct Usage Summary. In usage-based billing, Usage Summaries represent the billable aggregation of usage for a particular subscription or order product, billing period, and applicable rating characteristics. When an order is amended, the underlying order-product records and related references can change. An external integration therefore needs a stable value that can continue to identify the intended usage-summary context rather than relying on a record reference that may be replaced during amendment processing.

Matching ID is intended to support this integration and reconciliation use case. An external rating, metering, or mediation system can retain the matching value and include it when it sends subsequent usage uploads. Salesforce Billing can then use that value to map the uploaded usage appropriately, reducing the need for the external system to discover and maintain newly created order-product references after every amendment. This makes ongoing usage ingestion more reliable for amended subscriptions and preserves continuity between the external usage source and Salesforce Billing's billing records. See Salesforce's usage-based billing documentation and the Salesforce Billing product overview.

QUESTION NO: 7

What are three risks when using too many cross object formula fields in a Revenue Cloud Project?

A. Formula field data is not always available during CPQ quote calculation

B. Formula fields have unlimited access to object many relationships away which makes it vulnerable to data changes.

C. They are computationally Expensive.

D. They can easily exceed limits if not carefully designed and tested

E. Formula Fields are editable, after the calculation completes the sales user or process automation can overwrite its value

ANSWER: A C D

Explanation:

Formula field data is not always available during CPQ quote calculation, they are computationally Expensive, and they can easily exceed limits if not carefully designed and tested are the three relevant risks. Cross-object formulas are evaluated dynamically by Salesforce rather than stored as independent field values. In Revenue Cloud processes, this means that formula results depend on the related records and fields being available in the calculation context. When quote calculation performs multiple operations or related values are being updated within the same broader transaction, implementation teams must carefully validate calculation sequence and data readiness.

Each cross-object formula also adds runtime work because Salesforce must traverse relationships and evaluate the expression when the value is requested. This becomes significant when calculations process many quote lines, rules, products, or related records. A design with numerous formulas can therefore increase quote-calculation duration and contribute to broader transaction resource consumption. Formula design must also account for platform constraints, including formula compile-size limits, relationship traversal limits, and transaction governor limits. Testing realistic data volumes and calculation paths helps identify whether a formula-heavy design remains scalable. Salesforce discusses cross-object formula behavior in its Cross-Object Formulas Trailhead unit and documents formula considerations in Salesforce Help.

QUESTION NO: 8

A Revenue Cloud user story for a Subscription-based Company Looking toreplace their legacy system states “As a pricing Manager, bulk discounts will include previously purchased quantities for pricing calculations on the quote in order toreward loyal customers ”what should be included in the design of this solution?

A. Custom Action to retrieve Purchased quantities from an external source

B. Contracts, Subscriptions and Assets should be populated with historical data.

C. Use a summary variable targeting the subscription object with a Price Rule.

D. Legacy Orders and invoices should be migrated.

E. Discount schedules with Cross Orders checked.

ANSWER: B E

Explanation:

“Contracts, Subscriptions and Assets should be populated with historical data.” is required because the replacement solution needs a usable record of each customer’s prior entitlement or ownership. When historical subscription and asset information is represented in Salesforce CPQ, the pricing process can identify quantities already held by the customer and combine that context with quantities being quoted. Contracts provide the contractual framework for subscription records, while assets can represent previously purchased products in asset-based scenarios. This migration design is therefore essential to make the customer’s purchase history available to the CPQ process rather than leaving it only in the retired system.

“Discount schedules with Cross Orders checked.” supplies the pricing behavior that applies volume tiers using quantities across purchases, rather than evaluating only the quantity on the current quote line. With Cross Orders enabled on the applicable discount schedule, CPQ can use the customer’s existing eligible quantities together with the new quantity to determine the appropriate discount tier. Together, retained historical entitlement data and cross-order discounting implement the stated loyalty-pricing requirement using CPQ’s standard quantity-based discount capability. See Salesforce Trailhead’s guidance on creating discount schedules in Salesforce CPQ and managing Salesforce CPQ renewals.

QUESTION NO: 9

After installing Salesforce CPQ in your customers sandbox org you notice unacceptable performance times as the primary quote syncs to the opportunity. It's determined the cause for sub optimal performance is attributed to 30 process builders referencing the Quote and Opportunity along with other heavy customization that was previously

created.

What strategy should the Revenue Cloud consultant recommend to the customer.

A. Upgrade the org to the latest CPQ and Billing release, this will largely address the performance issues

B. Categorize the subpar customizations as ‘out of scope’, proceed with design and build, and address performance issues as the final task in UAT

C. Baseline current performance, recommend to identify and address the technical debt first before designing the Revenue Cloud solution

D. Architect the Revenue Cloud solution to follow suit by extending customization using coding best practices to improve scalability

ANSWER: C

Explanation:

Baseline current performance, recommend to identify and address the technical debt first before designing the Revenue Cloud solution is the appropriate recommendation. Primary quote synchronization updates related Opportunity data, so automation that runs on Quote and Opportunity records can be invoked during an already time-sensitive CPQ operation. With approximately 30 Process Builder processes plus substantial existing customization, the consultant should first establish measurable baseline timings, map the automation and dependencies involved, and identify the most costly or redundant processing. This creates an evidence-based remediation plan before new Revenue Cloud functionality adds further automation, data volume, and calculation activity.

Addressing technical debt early also permits the customer to consolidate and simplify record-triggered automation, eliminate unnecessary updates, and adopt a scalable automation design. Salesforce’s architecture guidance emphasizes evaluating automation interactions, execution order, limits, and maintainability as part of a sound solution design. Salesforce also recommends migrating legacy Process Builder automation to Flow, which provides a path to rationalize existing processes rather than carrying unnecessary complexity into the CPQ implementation. Resolving these root causes before solution design reduces delivery risk and establishes a reliable performance baseline for validating the Revenue Cloud build.

References: Salesforce Well-Architected: Automation and Salesforce Help: Migrate to Flow.

QUESTION NO: 10

A Revenue Cloud Customer has posted a cash payment that was created on Account A by mistake. What are the steps to apply this to the correct invoice on Account B?

A. Un-allocate the Payment if allocated, create a refund and then create a new payment for Account B

B. Un-allocate the payment if allocated and reparent the payment to Account B

C. Allocate the Payment to an invoice on Account B.

D. Set the payment status to cancelled and create a new payment on Account B.

ANSWER: A

Explanation:

Un-allocate the Payment if allocated, create a refund and then create a new payment for Account B is correct because a posted payment is a financial transaction tied to the account on which it was created. If it has already been allocated, the allocation must first be removed so that the original payment's application to an invoice is accurately reversed. The payment should then be refunded to reverse the cash transaction recorded against Account A. A separate payment can subsequently be created under Account B and allocated to the intended invoice.

This process preserves an auditable record of both the original error and its financial correction. In billing systems, correcting a posted cash transaction through unallocation and refunding, rather than altering its ownership after posting, supports accurate account balances, payment history, and downstream accounting reconciliation. The newly created Account B payment is then independently available for allocation against that account's invoice. Salesforce Revenue Cloud provides billing capabilities designed around traceable transaction records and controlled financial operations; see the Salesforce Revenue Cloud overview and the Salesforce Billing Basics Trailhead module.

QUESTION NO: 11

Universal Containers wants an optional implementation package to be added automatically whenever a sales representative selects the Enterprise Platform product within a bundle. The representative must still be able to remove the implementation package when it is not required.

Which Salesforce CPQ configuration should be used?

A. A Selection product rule with an Add action

B. An Option Constraint between the two product options

C. A Validation product rule with an error condition

D. A Price rule that sets the implementation package quantity to one

ANSWER: A

Explanation:

A Selection product rule with an Add action is the appropriate configuration. It can evaluate the selection of the Enterprise Platform option and add the implementation package to the bundle. Because the added option is not configured as required, the representative can remove it when the business scenario does not need implementation services.

An Option Constraint controls compatibility and dependencies but does not add an option. A Validation product rule only displays an error when conditions are met and does not change the configuration.

QUESTION NO: 12

A sales representative creates several quotes for one opportunity. The opportunity product records and opportunity amount must reflect the quote that the customer is most likely to accept.

What should the sales representative do?

A. Designate the appropriate quote as the Primary quote

B. Generate a quote document from the appropriate quote

C. Submit the appropriate quote for approval

D. Delete all other quotes from the opportunity

ANSWER: A

Explanation:

The representative should designate the appropriate quote as the Primary quote. Salesforce CPQ synchronizes the primary quote with the related opportunity, including the opportunity products and amounts used in opportunity reporting and pipeline management.

Generating a quote document or submitting a quote for approval does not by itself determine which quote synchronizes with the opportunity. Deleting the other quotes is unnecessary and removes useful commercial history.