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Salesforce Certified Sales Cloud Consultant

Salesforce CRT-251

Version Demo

Total Demo Questions: 50

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Topic Break Down

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QUESTION NO: 1

Universal Containers is planning to hire more sales representatives in response to three consecutive quarters of rapid growth. To optimize their sales impact, the sales management team wants to develop a better sales territory structure. Which two data points should the sales management team consider when developing the new sales territories? Choose two answers.

A. Attributes needed to segment and categorize customers.

B. Distance between customer headquarters and their sales representatives

C. Average number of customers managed by a sales representative.

D. Number of currencies needed to support each sales territory.

ANSWER: A C

Explanation:

When designing a territory model, the team should first identify the **attributes needed to segment and categorize customers**. Territory assignments need objective account characteristics that distinguish one market segment from another, such as industry, account type, geographic region, revenue potential, product line, or customer tier. These attributes become the criteria used to define logical territory boundaries and assignment rules, helping the organization align coverage with its go-to-market strategy.

The **average number of customers managed by a sales representative** is also essential capacity-planning data. A territory structure should distribute account workload at a sustainable level, rather than merely creating account groupings. Understanding the typical account load per representative enables management to estimate how many territories and reps are needed, balance workload across the expanded team, and preserve adequate time for prospecting, relationship management, and opportunity execution. Salesforce Enterprise Territory Management supports territory models and assignment rules that structure account coverage according to these business requirements. See Salesforce's Enterprise Territory Management overview and the Territory Management in Salesforce Trailhead module.

QUESTION NO: 2

Cloud Kicks (CK) maintains products and price books on an external platform due to the high frequency of pricing changes to products. CK has a B2B license. Sales managers want to monitor pipeline by sales rep and territory, report on team revenue to goal, and view order status an Salesforce.

What are two actions the consultant should take to meet the requirements?

Choose 2 answers

A. Enable Optional Price Books for Orders.

B. Implement Opportunity Teams and Opportunity Splits

C. Use opportunities and enable Forecasts

D. Import products and price books from the external platform.

ANSWER: C D

Explanation:

Use opportunities and enable Forecasts provides the core sales-management capabilities required for a B2B pipeline. Opportunities capture pipeline and revenue information, while Collaborative Forecasts lets managers review forecast amounts against quotas and roll up results through a forecast hierarchy. Forecasts can also be configured for territory-based forecasting, allowing managers to inspect performance by both sales representative and territory. This supports visibility into pipeline coverage as well as progress toward a team revenue goal.

Import products and price books from the external platform makes the externally managed product catalog and frequently updated pricing available in Salesforce. An integration should synchronize the relevant Product and Price Book records so sales users can associate the appropriate products and prices with Salesforce selling processes, including opportunities and orders. With Order records available in Salesforce, users can access each order's status directly in the CRM while working from the related account or sales record. The external platform remains the source of truth for catalog and price changes, and Salesforce receives the current catalog data needed for sales execution and reporting.

See Salesforce guidance on Collaborative Forecasts and Products and Price Books.

QUESTION NO: 3

During the last requirements meeting, Cloud Kicks team members said they will be attending a conference next week.

What should a consultant do in response to this news?

A. Use the downtime to develop User Acceptance Testing (UAT) scripts.

B. Update the project plan and communicate it to stakeholders.

C. Ask the client to sign off on requirements and start the Build phase.

ANSWER: B

Explanation:

"Update the project plan and communicate it to stakeholders" is the appropriate response because the conference creates a known availability constraint that can affect workshops, requirement clarification, reviews, approvals, testing, and delivery dates. A consultant should capture this dependency in the project schedule promptly, assess which planned activities require the unavailable team members, and reschedule or sequence work to protect milestones where possible. The revised plan should identify any changed dates, owners, risks, and decisions required from the project team. Communicating the update gives the sponsor, customer team, and delivery team a shared understanding of the timeline and lets them coordinate resources before the absence occurs. This is consistent with sound Salesforce implementation governance: the consultant manages scope, schedule, stakeholder expectations, and project risks throughout the engagement rather than waiting for a scheduling conflict to disrupt work. Salesforce's implementation guidance emphasizes establishing a plan and maintaining alignment with stakeholders, while project planning practices include tracking dependencies and risks as conditions change. See Salesforce Trailhead's Salesforce Project Management Basics and Consulting Basics.

QUESTION NO: 4

At Universal Containers, in addition to the sales team, support reps are sometimes eligible for commissions. When support reps are involved in a deal, they should receive a credit of 15% of the revenue.

What should the consultant consider when designing a revenue sharing solution?

A. Revenue splits are required in order to use overlay splits.

B. Overlay splits allocated on an Opportunity can total any percentage.

C. Overlay splits can be assigned to any user with the appropriate profile.

D. Revenue splits allocated on an Opportunity can total any percentage.

ANSWER: B

Explanation:

Overlay splits allocated on an Opportunity can total any percentage. Overlay splits are designed for exactly this type of shared-credit scenario: a support representative can receive commission credit for contributing to an opportunity without reallocating the revenue credit assigned to the core sales team. A consultant can create an overlay split type for support participation and assign the support rep a 15% split when appropriate. Unlike revenue splits, which distribute the opportunity's revenue among credited sellers and must collectively equal 100%, overlay splits represent additional credit. Therefore, their combined percentage is not constrained to a 100% allocation of the opportunity amount. This permits multiple supporting contributors, such as specialists, partners, or support representatives, to receive their respective credit percentages while preserving the primary sales team's revenue allocation. The design should include a clearly named overlay split type and an operational process for adding eligible support users to applicable opportunities so commission reporting consistently reflects both primary revenue ownership and supporting contributions. Salesforce describes the OpportunitySplit object and split types in its OpportunitySplit object reference. Additional implementation guidance is available in Salesforce Opportunity Splits documentation.

QUESTION NO: 5

Cloud Kicks (CK) sells online subscriptions for its leading Shoe of the Month club.

Customers can make a single payment or pay weekly, monthly, or quarterly. CK wants to use

Opportunities to track and report on these subscription deals.

What should a consultant recommend to meet this requirement?

A. Enable schedules on the Product object.

ANSWER: A

Explanation:

Enable schedules on the Product object is correct because Salesforce product schedules let Cloud Kicks represent the timing and value of subscription-related revenue directly on opportunity products. After an administrator enables product schedules, a product can be configured with a revenue schedule and assigned an appropriate schedule type. When sales users add that product to an opportunity, Salesforce creates opportunity product schedule records that distribute expected revenue across the selected periods. This supports a one-time payment as well as recurring weekly, monthly, or quarterly payments, while retaining the opportunity as the central sales record.

Because the schedule entries are associated with opportunity line items, Cloud Kicks can use them for pipeline and revenue reporting by date and period, rather than merely recording one aggregate opportunity amount. Administrators can define standard or custom schedule types as needed for the organization's payment cadence, and sales users can adjust generated schedules when a customer's agreement requires a different allocation. This approach is designed for forecasting and reporting planned product revenue over time within Sales Cloud. Salesforce documents the feature in its Product Schedules guidance and describes the related Revenue Schedules configuration.

QUESTION NO: 6

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 the observed issues point to a breakdown in project communication, alignment, and accountability. A communication plan establishes how project stakeholders share status, escalate risks or blockers, make decisions, and stay aware of upcoming work. When team members miss meetings and deadlines, the project manager needs timely visibility into capacity constraints, dependencies, and impediments before they affect delivery dates.

More frequent, purposeful check-ins create a consistent forum to confirm progress against milestones, review action items and owners, identify risks, and agree on next steps. The meetings should have a defined cadence, audience, agenda, and follow-up process, with decisions and commitments documented so that expectations are clear. The consultant can also help ensure that the revised plan uses the communication channels that best fit the sales team's working practices and includes an escalation path for unresolved issues. Salesforce's guidance on delivery planning emphasizes establishing governance and communication practices that keep stakeholders aligned throughout an implementation. See Salesforce Partner Delivery Methodology and Plan Your Project.

QUESTION NO: 7

Universal Containers is preparing for the launch of its new Sales Cloud implementation to a global user base. With previous sales automation applications, the company had slow adoption of the new solution. Which three Sales Cloud deployment factors should be considered to help ensure adoption? Choose three answers.

A. Type of training delivered

B. Sales rep quota targets

C. Management communications

D. Maintenance release schedule

E. Training in local language

ANSWER: A C E

Explanation:

Type of training delivered, Management communications, and Training in local language are key deployment factors for driving adoption across a global Sales Cloud user population. Training should be designed around the users' roles, daily selling processes, and the ways they will use Salesforce to complete real work. A practical, role-based approach helps users understand both how to use the application and how it supports their goals. Salesforce guidance emphasizes enabling users through appropriate training and support as part of a successful rollout.

Visible, consistent management communications are equally important because leaders establish the business context for the change, reinforce expected usage, and demonstrate organizational commitment. Communications should explain the value of the new processes, set expectations, and keep users informed before, during, and after launch. For a global deployment, training in local language reduces comprehension barriers and makes learning content more accessible and relevant to regional teams. Localized enablement helps ensure that users can confidently apply the new Sales Cloud processes in their own work environment. See Salesforce's guidance on driving Salesforce adoption and its change-management learning module for related rollout and enablement practices.

QUESTION NO: 8

Universal Containers wants to minimize the need for sales reps to manually create meetings and events that are stored on their calendars.

Which two Einstein Activity Capture (EAC) capabilities should the consultant consider? Choose 2 answers

A. EAC a two-way sync for events and contacts.

B. EAC events are unable to be synched with contacts and leads.

C. EAC adds events to the activity timeline for custom objects.

D. EAC supports emails, events, and contacts.

ANSWER: A D

Explanation:

"EAC a two-way sync for events and contacts." is a key capability because Einstein Activity Capture can synchronize supported calendar events and contacts between Salesforce and a user's connected Microsoft or Google account. This reduces duplicate data entry: a representative can work in the calendar application they already use, while relevant event and contact information is synchronized for use in Salesforce. The consultant should confirm the organization's chosen connection type, sync settings, and user permissions when configuring the feature.

"EAC supports emails, events, and contacts." is also correct because Einstein Activity Capture is designed to capture and relate sales activity from connected email and calendar accounts. It brings email and calendar activity into Salesforce activity views and supports contact synchronization, helping representatives spend less time logging communications and creating calendar records manually. These capabilities directly support the stated objective of keeping calendars and Salesforce activity information current through automation. Salesforce provides configuration details and supported behavior in its Einstein Activity Capture overview and its contact and event synchronization documentation.

QUESTION NO: 9

In the Discovery phase of a Sales Cloud implementation, what are three effective ways a consultant can determine the design of the system? Choose 3 answers

A. Schedule training.

B. Establish performance benchmarks.

C. Observe end users.

D. Administer a survey.

E. Host a focus group.

ANSWER: C D E

Explanation:

Observing end users, administering a survey, and hosting a focus group are effective discovery techniques because they gather direct evidence about how people work, what information they need, and where the current process creates friction. Observation lets the consultant see the real sequence of sales activities, including workarounds and handoffs that may not appear in documented processes. Surveys efficiently collect input from a broad population and can identify common needs, priorities, and adoption concerns across roles or regions. Focus groups provide a facilitated setting in which representative stakeholders can discuss workflows, validate shared requirements, and surface differing needs among sales users, managers, and supporting teams. Together, these approaches help translate business processes and user needs into an appropriate Sales Cloud design, including data, automation, user experience, and reporting requirements. Salesforce recommends understanding users and business processes early so the solution is designed around validated requirements and measurable business outcomes. See Salesforce's Salesforce implementation guidance and Sales Cloud Basics on Trailhead.

QUESTION NO: 10

Which two actions can a consultant take during the project planning phase to ensure client stakeholder goals are met? (Choose two.)

A. Create scheduled dashboard to be sent weekly to all stakeholders.

B. Ensure the project key performance indicators are profitable.

C. Acquire the client stakeholder's key performance indicators.

D. Establish a stakeholder committee and meeting schedule.

ANSWER: C D

Explanation:

"Acquire the client stakeholder's key performance indicators" is correct because project planning must begin with a clear understanding of the outcomes stakeholders expect Salesforce to support. Key performance indicators translate business goals into measurable success criteria, such as improved conversion rates, reduced sales-cycle time, or increased forecast accuracy. Capturing these measures helps the consultant define requirements, prioritize scope, establish a baseline where appropriate, and design reports or processes that can demonstrate whether the implementation delivers the intended value.

“Establish a stakeholder committee and meeting schedule” is also correct because stakeholder governance and regular communication are essential planning activities. A defined stakeholder group provides a structured path for decisions, feedback, prioritization, risk escalation, and approval throughout the project. A recurring meeting schedule keeps business sponsors, subject-matter experts, and project team members aligned on goals, milestones, open requirements, and changes. Together, documented KPIs and an active governance cadence create accountability for outcomes rather than focusing only on system configuration. Salesforce implementation guidance emphasizes planning around business objectives and engaging stakeholders throughout delivery. See Salesforce Implementation Basics and Business Analysis Projects.

QUESTION NO: 11

Cloud Kicks has enabled multi-Currency in its organization. All the rates are set.

What will happen if the exchange rates are adjusted?

A. All newly closed opportunities will use the new conversion rate.

B. Opportunities created this month will use the new conversion rate and old opportunities will remain the same.

C. New opportunities will use the new conversion rate and old opportunities will remain the same.

D. All opportunities will use the new conversion rate.

ANSWER: D

Explanation:

All opportunities will use the new conversion rate. With standard multicurrency, an organization maintains a single active conversion rate for each currency relative to the corporate currency. When an administrator adjusts one of those rates, Salesforce uses that updated rate whenever it converts amounts in that currency for display, reporting, and calculations that require a converted value. This means that converted values for both existing and newly created opportunities reflect the revised rate; the record’s entered Amount and its selected Currency ISO Code do not change, but its equivalent value in the corporate currency is recalculated using the current rate.

This behavior is important when reviewing historical pipeline or revenue in a corporate currency because a later rate adjustment can change the converted totals shown for opportunity data. If Cloud Kicks needs opportunity conversion to be based on historical rates tied to the opportunity close date instead, it should evaluate Advanced Currency Management, which supports dated exchange rates for opportunities and opportunity products. See Salesforce Trailhead’s Manage Currencies guidance and the Salesforce Currency Setup documentation.

QUESTION NO: 12

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

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

Accounts.

What should the consultant recommend?

A. Implement the Contacts to Multiple Accounts feature.

B. Implement Person Accounts to represent the relationship.

C. Use a junction object to represent the previous companies

D. Use Account Teams associated with the previous companies.

ANSWER: A

Explanation:

Implement the Contacts to Multiple Accounts feature. This feature is designed for situations in which one individual has relationships with more than one business account over time. Cloud Kicks can retain one Contact record for each contractor while associating that contractor with each current or former company through account-contact relationship records. This preserves a useful employment or company-association history without losing the contractor's identity, activity history, or engagement data when the contractor moves to another organization.

The Contact's primary account can represent the contractor's current company, while additional account relationships retain prior company connections. Each relationship can also hold relationship-specific information, such as the contractor's role, title, start date, end date, or relationship status, using fields on the Account Contact Relationship record where appropriate. This gives marketing and sales users a consistent view of the person and the organizations with which that person has been associated, supporting future focus-group outreach and historical reporting. Salesforce documents this capability as relating a single contact to multiple accounts while maintaining one contact record. See Salesforce Help: Associate Contacts with Multiple Accounts and Salesforce Help: Account Contact Relationships.

QUESTION NO: 13

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

What should a consultant recommend to build this report?

A. Reporting snapshot

B. Roll-up summary flied

C. Cross filter

ANSWER: C

Explanation:

Cross filter is correct because it lets a report identify parent records according to the presence or absence of related records. The consultant can create an Accounts report and apply cross-filter logic to return Accounts with Opportunities, applying an Opportunity filter for open statuses, while also requiring Accounts without Contacts. This directly addresses the business question at the report level: it finds account records that have active sales activity but lack the contact data needed to support that activity.

Cross filters are designed for relationship-based reporting and support conditions such as records "with" or "without" related records. They can also be combined with standard report filters and subfilters, enabling the report to limit the related Opportunity records to those that are open. The resulting report is actionable for data-quality remediation because users can review the affected Accounts and add or associate the necessary Contacts. Salesforce documents cross filters as a way to filter a report by related-object criteria, including finding records without related records. See Salesforce's Cross Filters documentation and the Salesforce Reports and Dashboards filtering module.

QUESTION NO: 14

Cloud Kicks has an integration between the data warehouse and Salesforce. The VP of operations wants to synchronize customer data between the systems.

What should the consultant recommend to ensure data integrity?

A. Set up an External ID field on the Account object with Read only on the field security settings for all profiles except the admin profile.

ANSWER: A

Explanation:

Set up an External ID field on the Account object with Read only on the field security settings for all profiles except the admin profile. This gives the integration a stable, system-independent key for identifying the same customer record in Salesforce and in the data warehouse. The integration can use that value when performing upsert operations, allowing it to update an existing Account when the external identifier is found and create an Account only when no matching identifier exists. This prevents the common synchronization problem of creating duplicate customer records merely because Salesforce record IDs are not available in the external system.

Restricting edit access to the identifier is equally important. The value is intended to be controlled by the source-system and integration process, rather than changed manually by business users. Protecting it from unintended updates preserves the relationship between the warehouse customer record and its corresponding Salesforce Account over time. Salesforce documents that external ID fields can be used to match records in upsert operations and that field-level security controls which users can edit fields. See Salesforce Bulk API Upsert documentation and Salesforce Field-Level Security documentation.

QUESTION NO: 15

Cloud Kicks is in the process of implementing Salesforce 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. Give users access to a Sandbox environment.

C. Define the sales process.

D. Plan a first release with minimum features

ANSWER: A

Explanation:

Establish goals and key metrics is the appropriate recommendation because adoption improves when leadership and users share a clear understanding of what Salesforce is intended to accomplish and how success will be measured. The consultant should work with stakeholders to define measurable business outcomes, such as the percentage of sales representatives logging activities, the completeness of opportunity data, pipeline coverage, forecast accuracy, or reductions in time spent on manual reporting. These measures give senior management objective visibility into whether users are incorporating Salesforce into their daily work and allow the implementation team to identify where additional enablement, process refinement, or executive reinforcement is needed.

Clear goals also connect user behaviors to business value. When representatives understand that consistently updating opportunities supports more reliable forecasts, better coaching, and stronger customer follow-up, they have a practical reason to use the system rather than viewing it solely as an administrative requirement. Salesforce's adoption guidance emphasizes defining success measures, monitoring usage, and acting on the results as part of sustaining adoption after launch. See Salesforce Adoption Strategies and Salesforce User Reports.

QUESTION NO: 16

Cloud Kicks requires its sales reps to 90 through an internal certification process on myTrallhead before they add specific groups of Products to Opportunities.

Which two solutions should be used to validate that sales reps have completed the myTrailhead badge?

Choose 2 answers

A. Use a validation rule on Opportunity Products to prevent a sales rep from adding Products marked as requiring the myTrailhead badge if the rep has yet to complete the badge.

B. Use a Process Builder process on Products marked as requiring the myTrailhead badge to automatically share the Products with sales reps who have completed the badge.

C. Use a validation rule on Products marked as requiring the myTrailhead badge to prevent those Products from being added to an Opportunity.

D. Use a separate price book for the Products requiring the myTrailhead badge and only share the price book with sales reps who have completed the badge.

ANSWER: A D

Explanation:

Using a validation rule on Opportunity Products to prevent a sales rep from adding Products marked as requiring the myTrailhead badge if the rep has yet to complete the badge provides enforcement exactly when the rep attempts to add a restricted product. The rule can evaluate a flag on the related product or price book entry indicating that certification is required and compare it with a completion indicator available for the current user. If the requirement is not met, the validation rule displays an error and prevents the Opportunity Product from being saved. Salesforce validation rules are designed to enforce data-quality and business requirements at save time; see [Salesforce Trailhead: Get Started with Validation Rules]().

Using a separate price book for the Products requiring the myTrailhead badge and only sharing the price book with sales reps who have completed the badge supplies an access-based control in addition to record validation. Place the restricted products in a dedicated custom price book, then grant the appropriate users or groups access after their badge completion status is confirmed. This limits which reps can select the restricted product prices while working with opportunities. Salesforce describes how products and price books work together in [Products and Price Books]().

QUESTION NO: 17

Sales managers at Cloud Kicks have noticed that information in some opportunity reports is incomplete. A consultant has performed an analysis and determined that opportunity stages often lack key information that sales managers at each stage because sales reps have yet to enter the data.

What should the consultant recommend so opportunity stage reports always contain the data managers expect?

A. Configure Path by checking the key field required checkbox.

B. Create an Auto launched flow to determine if required fields are missing.

C. Customize path and create validate rules dependent on stages.

D. Mark the fields as required on the page layout.

ANSWER: C

Explanation:

Customize path and create validate rules dependent on stages is the appropriate recommendation because it combines user guidance with enforceable data quality controls. Opportunity Path can be tailored to each sales stage so that representatives see the fields and guidance that are most relevant as they progress an opportunity. This makes the expected information clear at the point where it is needed, rather than relying on users to infer which details managers require.

Validation rules provide the enforcement needed to ensure report completeness. A validation rule can evaluate the Opportunity Stage value and require the associated fields to be populated before the record can be saved at that stage. For example, when an opportunity is moved to a later stage, the rule can require fields such as an amount, close plan details, or a reason for the stage change. Because the data is required before the opportunity can remain in the applicable stage, stage-based reports consistently contain the information sales managers expect. Salesforce describes validation rules and their error-message behavior in [Validation Rules](), and explains how Path presents stage-specific key fields and guidance in [Set Up Path]().

QUESTION NO: 18

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 after the Salesforce Release.

B. Test new configurations in a preview sandbox

ANSWER: A B

Explanation:

“Deploy after the Salesforce Release.” is appropriate because a non-preview sandbox receives the new seasonal Salesforce release only after production has been upgraded. Deploying configurations during the release window can introduce an avoidable mismatch between the source sandbox’s release version and the target organization’s version. Scheduling the deployment after the release is complete helps ensure that the environments are aligned and that the deployment is validated against the version that users will actually run in production.

“Test new configurations in a preview sandbox” is also appropriate because preview sandboxes are upgraded before production for the upcoming Salesforce release. They provide a controlled place to test configuration behavior, automation, integrations, and user workflows against the new release before the production upgrade occurs. This early testing identifies release-related impacts in time to adjust the configuration and finalize a safer deployment plan. Salesforce describes the distinct upgrade timing of preview and non-preview sandboxes in its Sandbox Preview documentation. Consultants should also use Salesforce’s Trust site to confirm the organization’s maintenance and release schedule when planning deployment activities.

QUESTION NO: 19

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

Running, Athleisure, and Celebrity Co-Branded. The VP of Atheisure controls a large budget

and is often able to re-prioritize business stories and ‘shadow projects’ into releases ahead of

other groups.

This topic comes up frequently and often details the monthly project management meeting,

which limits the amount of time available to cover other critical topics.

Which two strategies should the consultant recommend to address these issues?

Choose 2 answers

A. Create a weekly All-Hands call, including business and technology resources, to review direction and priority of development.

B. Divide the development team into three units/tracks to support each line of business independently.

ANSWER: A B

Explanation:

“Create a weekly All-Hands call, including business and technology resources, to review direction and priority of development.” is appropriate because Cloud Kicks needs a recurring, transparent governance forum that includes representatives from every business line and the delivery team. A regular prioritization cadence makes trade-offs visible, establishes a shared view of the release backlog, and gives stakeholders a defined place to raise new requests rather than allowing informal escalation or shadow projects to disrupt agreed work. It also keeps the monthly project-management meeting available for broader operational and strategic decisions.

"Divide the development team into three units/tracks to support each line of business independently." is also appropriate when the three lines have continuing, substantial demand. Dedicated delivery tracks create clearer capacity ownership and reduce direct competition for the same developers during sprint and release planning. Combined with centralized priority review, this model lets each business line plan and deliver work predictably while maintaining coordination for shared-org dependencies, architecture standards, and releases. Salesforce's governance guidance emphasizes clear decision-making structures and stakeholder alignment, while its delivery guidance supports planning work around team capacity and a defined release process. See [Salesforce Well-Architected: Governance] and [Salesforce Development Lifecycle and Deployment].

QUESTION NO: 20

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

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

A. Implement Collaborative Forecasting with product family.

B. Build a custom forecast report showing product groups.

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

D. Implement Collaborative Forecasting with quota attainment.

ANSWER: A D

Explanation:

Implement Collaborative Forecasting with product family enables a product-family forecast type. Product family forecast types aggregate opportunity-product amounts or quantities by the Product Family value, letting management evaluate forecasts across multiple product groups rather than only at the overall opportunity level. Forecasts are also organized through the forecast hierarchy, so managers can roll up and view the forecasts submitted by the sales representatives beneath them.

Implement Collaborative Forecasting with quota attainment complements this setup by establishing quotas for forecast users and exposing the relationship between each representative's forecast and assigned quota. Managers can use quota attainment to assess individual and rolled-up team performance against targets while reviewing forecast values. Together, product-family forecasting supplies the required product-group dimension, and quota attainment provides meaningful representative-level target context in the Collaborative Forecasts process. Salesforce documents forecast types, including product-family forecasts, and describes quota-based forecast performance in its forecasting resources: [Salesforce Help: Forecast Types] and [Salesforce Trailhead: Sales Forecasts].

QUESTION NO: 21

Universal Containers has set up a sales process that requires opportunities to have associated product line items before moving to the negotiation stage.

Which two solutions should a consultant recommend to meet this requirement? Choose two answers.

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

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

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

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

ANSWER: A C

Explanation:

Configure a validation rule that tests the Has Line Item and Stage fields for the correct condition. The Opportunity object exposes the standard HasOpportunityLineItem indicator, which reflects whether the opportunity has at least one associated opportunity product. A validation rule can evaluate this indicator together with the Stage field and prevent users from saving an opportunity in the negotiation stage when no line item exists. This makes the requirement enforceable regardless of whether a user changes the stage from the record page, list view, API, or another supported update path. Salesforce validation rules are designed to enforce data-quality and business-process requirements at save time. See Salesforce Trailhead: Validation Rules.

Ensure that all sales representatives have access to at least one PriceBook when creating product lines. Opportunity products are selected from a price book, so sales representatives need access to an active price book in order to add the required products and prices to opportunities. Providing this access supports the sales process operationally: users can create the line items that the validation rule requires before advancing the opportunity. Price books define the product prices available for use on opportunities; see Salesforce Trailhead: Products and Price Books.

QUESTION NO: 22

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 calender events gives representatives a connected calendar experience between Salesforce and their email calendar application. This reduces duplicate entry by allowing calendar information to be synchronized, while ensuring customer meetings and other scheduled interactions are available in Salesforce as activity data. Salesforce Inbox is designed to bring Salesforce productivity features into supported email and calendar clients, including Microsoft Outlook and Gmail.

Logging emails with records in Salesforce from Outlook or Gmail is also essential because it lets a representative relate a customer email to the appropriate Salesforce record, such as an account, contact, lead, opportunity, or case. Once an email is logged as Salesforce activity, users can review the correspondence in the record's activity timeline and use Salesforce activity reporting to analyze engagement. Together, calendar synchronization and email logging address both types of requested customer interaction while letting sales representatives work from the email tools they already use. Salesforce documents the available Outlook and Gmail integration capabilities at Salesforce Help: Gmail Integration and Salesforce Help: Outlook Integration.

QUESTION NO: 23

Cloud Kicks (CK) wants to implement sharing rules. Which three considerations

should the consultant explain to CK?

Choose 3 answers

A. CK can expand access beyond the organization-wide default levels with sharing rules.

B. Organization-wide defaults must be Public Read Only or Private to create sharing rules.

C. Sharing rules apply only to new records that meet the definition of the source data set.

D. When a sharing rule is deleted, the sharing access created by that rule must be manually removed.

E. When multiple sharing rules are assigned, the user is assigned the least restrictive access.

ANSWER: A B E

Explanation:

Sharing rules are designed to open up record access beyond the baseline established by organization-wide defaults. They grant access to records owned by members of a source group or records matching specified criteria, and can share those records with public groups, roles, roles and subordinates, territories, or portal-related groups where applicable. This makes "CK can expand access beyond the organization-wide default levels with sharing rules." a core consideration for the implementation.

For standard and custom objects that support sharing rules, sharing rules are relevant when the organization-wide default is *Private* or *Public Read Only*; these baselines leave access that can be expanded through a rule. Salesforce sharing is additive: when a user receives access from multiple sources, including sharing rules, Salesforce provides the most permissive access available. Therefore, "When multiple sharing rules are assigned, the user is assigned the least restrictive access." accurately describes the resulting access model. Consultants should use these principles when designing groups, ownership models, and rule criteria so that users receive the required visibility without relying on manual sharing. See Salesforce's Sharing Rules documentation and Record Access and Sharing documentation.

QUESTION NO: 24

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 because activation represents a committed sales transaction and Salesforce requires at least one order line item before that transaction can move to an active state. This validation preserves the integrity of the order by ensuring that an activated order always has a defined item to sell, fulfill, or track. The relationship between an Order and its Order Products is part of Salesforce's standard order data model; see the Salesforce Order object reference.

Multiple reduction orders can be created for a single order because reduction orders provide an auditable way to adjust quantities after the original order has been activated, rather than overwriting the original committed order data. Each reduction order records a separate reduction transaction, enabling the organization to preserve history while accommodating changes such as partial cancellations or returned quantities. Salesforce maintains the connection to the original order and applies controls so that reductions remain consistent with quantities previously ordered. This supports reliable reporting, fulfillment tracking, and downstream integrations. Salesforce's standard order-management behavior and lifecycle concepts are described in Salesforce Help: Orders.

QUESTION NO: 25

A marketing department that runs many concurrent campaigns has specified that the influence timeframe for a campaign is 60 days. What is the impact on the campaign influence for opportunities when a contact is associated to an opportunity in a contact role?

A. Campaigns in which a contact became a member within the last 60 days will be associated and displayed in Campaigns with Influenced Opportunities Report.

B. All contacts associated with campaigns will be added to the campaign influence related list.

C. Sales reps can choose which campaigns created within the last 60 days should be added to the campaign influence related list.

D. All campaigns created within the last 60 days will be added to the campaign influence related list.

ANSWER: A

Explanation:

Campaigns in which a contact became a member within the last 60 days will be associated and displayed in Campaigns with Influenced Opportunities Report. When Salesforce associates a contact with an opportunity through an opportunity contact role, Campaign Influence can automatically evaluate that contact's campaign memberships. The configured influence timeframe limits which memberships are eligible for automatic influence association. With a 60-day timeframe, campaign memberships that fall within the applicable 60-day window are used to create Campaign Influence records for the opportunity. Those records connect the campaign and opportunity, allowing the campaign's contribution to pipeline and revenue to be analyzed in standard Campaign Influence reporting, including the Campaigns with Influenced Opportunities report. This setting is especially useful for organizations running numerous campaigns because it focuses attribution on recent, relevant campaign engagement rather than associating every historical campaign membership for a contact. The resulting influence records provide marketers with a consistent basis for evaluating which campaigns contributed to opportunity creation and progression. Salesforce documents the relationship between campaign members, opportunity contact roles, and automatically added campaign influence records in its Campaign Influence documentation. Additional guidance on measuring campaign impact is available in the Salesforce Trailhead Campaign Influence unit.

QUESTION NO: 26

Universal Containers needs to track quarterly sales goals for users. What are two ways a consultant can display sales goals and allow users to track their progress toward their goals?22.

Choose 2 answers:

A. Create a Custom Report Type.

B. Enable Forecast Adjustments.

C. Enable Show Quota % Attainment.

D. Create a quarterly snapshot

ANSWER: B C

Explanation:

Enable Forecast Adjustments and Enable Show Quota % Attainment support quota-based goal tracking within Collaborative Forecasts. Forecast adjustments let forecast users with the appropriate permissions revise their forecast amounts when their expected performance changes. This provides a practical way to keep an active forecast aligned with a user's current outlook during a quarter, while retaining the quota as the goal against which performance is measured.

Showing quota percentage attainment adds a clear progress indicator to the forecast experience. Users and managers can compare the forecast amount with the assigned quarterly quota and immediately see progress toward the sales target as a percentage. Quotas can be assigned for forecast periods, including quarterly periods, and the attainment metric makes those goals visible where users review their forecasts. Together, these settings provide both a goal-oriented benchmark and an actionable forecasting workflow for monitoring progress throughout the quarter. See Salesforce Trailhead's Collaborative Forecasts configuration guidance and the Salesforce documentation on forecast adjustments.

QUESTION NO: 27

Universal Containers wants to measure revenue based on when individual Products are sold.

What should a Consultant implement to meet this requirement?

A. Forecasting by Order Amount

B. Forecasting by Opportunity Amount

C. Forecasting by Product Dates

D. Forecasting by Schedule Date

ANSWER: C

Explanation:

Forecasting by Product Dates is the appropriate implementation because the requirement is to assess revenue at the individual product level and align that revenue to the date on which each product is sold. Opportunity-level forecasting treats the opportunity as the forecasting unit, whereas product-date forecasting supports a more granular view of the revenue associated with opportunity products. This is especially useful when a single sales opportunity contains multiple products that may be sold, delivered, or recognized at different points in time. By using the product date as the time basis for the forecast, sales leadership can review expected and actual product revenue in the relevant forecast periods without losing the detail needed for product-level planning and analysis. Consultants should also ensure that users consistently maintain the applicable product date data on opportunity products, because forecast accuracy depends on those dates being complete and reliable. Salesforce forecasting is designed to support revenue forecasting and rollups across sales hierarchies, while opportunity products provide the line-item detail needed for product-specific sales tracking. See Salesforce's Forecasts overview and the OpportunityLineItem object reference.

QUESTION NO: 28

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 is appropriate because Salesforce prevents a user from saving a manually created Lead until a value has been entered in a field configured as required. A consultant can make a custom Lead field required at the field-definition level, and can also use page-layout requirements where appropriate for the users entering leads. This establishes an immediate data-entry control for information that every sales rep must provide during lead creation.

A validation rules is also appropriate because validation rules enforce more specific data-quality requirements at save time. They can require a field only under defined conditions, such as requiring an industry, lead source detail, or contact method for particular lead statuses, countries, or record types. Validation rules can also ensure that entered data meets business criteria rather than merely being nonblank. Together, required fields cover universally mandatory information, while validation rules enforce conditional completeness and business-specific lead qualification standards. Salesforce documents required custom-field behavior at Create Custom Fields and validation-rule enforcement at Validation Rules.

QUESTION NO: 29

A consultant it working with Cloud Kicks (CK) on its initial Sales Could implementation. CK wants its sales reps to be able to use Sales Cloud to track accounts, contacts, and opportunities before its global conference in 4 months.

What should the consultant recommend to meet the requirement?

A. Set obtainable metrics, goals, and milestones for the deadline.

B. Deploy the Salesforce mobile app to the team prior to the event.

C. Reschedule the event to ensure functionality is complete.

D. Implement additional features to make the team more productive-

ANSWER: A

Explanation:

Set obtainable metrics, goals, and milestones for the deadline. Cloud Kicks has a clearly defined, time-bound business outcome: enable core sales processes—account, contact, and opportunity tracking—within four months. A consultant should turn that outcome into a focused implementation plan with measurable milestones, such as requirements confirmation, data preparation, configuration, testing, user training, and production deployment. This approach keeps the initial release centered on the minimum functionality needed for representatives to work successfully before the conference, while giving project stakeholders regular checkpoints to assess progress, resolve risks, and make timely decisions.

Salesforce recommends defining success metrics early so teams can measure adoption and business outcomes after implementation. For this initial rollout, useful measures can include the percentage of sales reps trained and active, the percentage of relevant accounts and contacts available in Salesforce, and the number or percentage of opportunities created and updated in the system. Establishing milestones also supports a phased delivery model: the required foundational Sales Cloud capabilities can be delivered by the deadline, with enhancements planned for later releases. See Salesforce guidance on defining success metrics and Salesforce implementation planning.

QUESTION NO: 30

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 primary content for sales-process use cases. Sales reps perform the day-to-day selling work, so they can describe how leads are qualified, how opportunities progress, what information they need at each stage, which activities they complete, and where process friction occurs. Their input grounds the use cases in the practical workflows that the Salesforce solution must support.

Sales operations provides the complementary operational perspective. This group typically owns or supports sales-process governance, pipeline definitions, forecasting practices, data-quality expectations, reporting needs, territory or assignment practices, and adoption measurement. Sales operations can validate that proposed use cases align with standardized processes and scalable business requirements, rather than reflecting only an individual seller's preferred workflow.

Together, these groups provide both the user-level detail and the process-level structure needed to document complete, actionable use cases. Salesforce's sales planning guidance emphasizes aligning selling processes, roles, and operational practices, while its discovery guidance focuses on understanding users' current work and desired outcomes. See Salesforce Sales Planning documentation and Salesforce Trailhead: Sales Cloud Discovery and Design.

QUESTION NO: 31

Northern Trail Outfitters (NTO) wants to start tracking orders accounts in Sales Cloud. NTO has hired a consultant to complete the project.

What should the consultant take into account when implementing sales orders?

A. Contract Number is a required field on the Order page layout.

B. Order line items can be added or removed after an order is activated.

C. Orders can be activated for active and inactive contracts.

D. Order line items cannot be added or removed after an order is activated.

ANSWER: D

Explanation:

Order line items cannot be added or removed after an order is activated. Activation represents the point at which the order is finalized for fulfillment and downstream processing, so Salesforce preserves the order and its product details to maintain an accurate transaction record. Before activation, users can build the order by selecting a price book and adding, changing, or deleting order products as business requirements evolve. The consultant should therefore ensure that NTO's sales process includes review and approval of quantities, pricing, discounts, and products before an order reaches the Activated status. If corrections are needed after activation, the organization's process should handle them in a controlled manner, such as returning the order to a modifiable status when permitted or creating an appropriate replacement or adjustment record. This behavior is an important implementation consideration because it affects user training, validation rules, approval automation, integrations, and reporting expectations. Salesforce's order functionality is designed to track a committed commercial transaction rather than an ongoing, freely editable cart. See Salesforce's Orders Trailhead module and the Order object reference for details on the standard order data model and lifecycle.

QUESTION NO: 32

Universal Containers has implemented Salesforce for all of its sales reps. All sales reps are required to select the win or loss stage on every

closed opportunity. Managers like to measure the win ratio for all of the sales reps.

How should a consultant meet the requirement?

A. Ensure that all managers have access to the standard Win report.

B. Build a custom report on Opportunity with custom summary formulas to show win ratio.

C. Create 3 custom formula field on Opportunity to capture the win ratio for opportunities.

ANSWER: B

Explanation:

Build a custom report on Opportunity with custom summary formulas to show win ratio. is the appropriate solution because win ratio is an aggregate metric, not a value that belongs on an individual Opportunity record. A consultant can create an Opportunity report filtered to closed opportunities, group the results by Opportunity Owner so that each sales representative has a separate summary grouping, and use a custom summary formula to calculate the percentage of won opportunities relative to all closed opportunities. For example, the calculation can divide the number of records whose stage is Closed Won by the total number of records in the owner grouping, then format the result as a percentage. This makes the ratio dynamically reflect the opportunities included by the report's date range, filters, and groupings, while allowing managers to compare each representative and view an overall total. Salesforce custom summary formulas are designed specifically for calculations based on report aggregate values and can be displayed at grouping levels and grand totals. See Salesforce's custom summary formula documentation and the Trailhead module on report formulas.

QUESTION NO: 33

Universal Containers has hired a new employee for the global sales leadership team. The employee is interested in fostering friendly competition between account executives, with an emphasis on reinforcing activities that drive sales.

Which action should help support the sales teams?

A. Create a dashboard that displays the most sales closed by region using charts to show sales in green and lost opportunities in red.

B. Show a leaderboard on the regional sales dashboards highlighting the account executives who have created the most opportunities.

C. Show a leaderboard on the regional sales dashboards highlighting account executives who have held the most prospect meetings.

ANSWER: B

Explanation:

Show a leaderboard on the regional sales dashboards highlighting the account executives who have created the most opportunities is the best action because opportunity creation is an early, measurable sales activity that directly builds pipeline. A visible leaderboard gives account executives timely recognition for creating qualified selling opportunities and promotes friendly competition around a behavior that sales leadership wants to reinforce. Displaying the information in each region's sales dashboard also gives managers and representatives a shared, accessible view of performance within the relevant team context.

Salesforce dashboards are designed to present report data visually so users can monitor key metrics and trends. A leaderboard-style dashboard component based on an Opportunities report can rank account executives by the number of opportunities they create, making the desired activity transparent and easy to track. This aligns motivation with pipeline generation rather than only focusing attention on later-stage outcomes. Leaders can further ensure the metric is meaningful by using consistent opportunity-creation criteria and appropriate dashboard filters for each region. Salesforce documentation describes how dashboards display report data and how dashboard components can be configured to communicate business performance: Salesforce Dashboards Overview and Dashboard Components.

QUESTION NO: 34

The enterprise architect for cloud Kicks wants to understand how objects in sales cloud

are connected to one another.

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

Choose 2 answers

A. Explain the types of object relationships in Salesforce

B. Review the Object Manager tab in Setup with the customer.

C. Use Schema Builder to show a visual of related objects.

D. Obtain an export of object data from the current system.

ANSWER: B C

Explanation:

Review the Object Manager tab in Setup with the customer. is appropriate because Object Manager is the central Setup workspace for examining an object's configuration. A consultant can open the relevant standard or custom objects and review their fields and relationship definitions, including lookup and master-detail relationship fields. This lets the architect inspect the metadata that establishes how records are connected and understand the relationship details directly in the org.

Use Schema Builder to show a visual of related objects. is also appropriate because Schema Builder presents objects and their relationships in a graphical, diagram-style interface. It helps an architect quickly see the broader data model, including relationship lines between objects, rather than having to inspect each object separately. Used together, Object Manager provides detailed object-level configuration review, while Schema Builder provides an accessible visual representation of the connected model. Salesforce documents Object Manager as the location for managing object configuration and Schema Builder as a tool for viewing and working with objects and relationships. See Salesforce Object Manager documentation and Salesforce Schema Builder documentation.

QUESTION NO: 35

Cloud Kicks sales representatives are allowed to negotiate up to a 5% discount for the Shoe of the Month dub. Regional sales managers (RSMs) must approve discounts greater than 5%. Regional vice presidents (RVPs) also must approve discounts greater than 10%.

Which two steps should a consultant recommend to satisfy these requirements7

Choose 2 answers

A. Create two Approval Processes, one with the RSM and one with the RVP.

B. Use Process Builder to send an approval Task and email to the RSM and RVP.

C. Use Process Builder to automatically submit approvals over a 5% discount.

D. Create a two-step Approval Process with the RSM and RVP as approvers.

ANSWER: C D

Explanation:

Creating a two-step Approval Process with the RSM and RVP as approvers supports the required escalation path in one governed approval workflow. The approval process can use entry criteria that identify discount requests above 5%. Its first approval step routes the request to the applicable RSM. A subsequent approval step can use step criteria for discounts above 10%, routing only those higher-discount requests to the applicable RVP after the RSM approval. This preserves the requirement that discounts greater than 10% receive both levels of approval, while requests from greater than 5% through 10% require only RSM approval.

Using Process Builder to automatically submit approvals over a 5% discount ensures qualifying requests enter that approval process without relying on a sales representative to manually click Submit for Approval. The process evaluates the record when the relevant discount value is created or updated and invokes the Submit for Approval action when the threshold is exceeded. In a current implementation, a record-triggered Flow is generally the strategic automation tool replacing Process Builder, but Process Builder's Submit for Approval action is valid for the functionality described. Salesforce documents approval-process steps and criteria at Salesforce Approval Processes and the automation migration direction at Migrate to Flow.

QUESTION NO: 36

Universal Containers continues to see substantial growth year-over-year. Outside sales

reps think their territories are too dense to cover adequately. Leadership has decided to modify

the existing sales territories and hire additional staff to make the account allocations more

manageable. Some states will change from one territory to two or more smaller territories. In

these instances, accounts will need to be reassigned to new territories.

Sales operations wants to review the territory account assignments and verify the accuracy

before the changes are reflected in Sales Cloud.

How should the consultant show sales operations what the data will look like after the change?

A. Use Tableau to geocode account addresses and display on a territory map.

B. Install the Territory Management Reporting Pack from the AppExchange.

C. Run the updated assignment rules in planning State and view the accounts on the territory detail page.

D. Use Data Loader to export the accounts and make updates in Google Sheets.

ANSWER: C

Explanation:

Run the updated assignment rules in planning State and view the accounts on the territory detail page. Enterprise Territory Management supports a planning state specifically so administrators can model territory changes without immediately affecting the active territory structure or the assignments that sales users rely on. The consultant can create or revise the proposed territory hierarchy, including splitting a state into smaller territories, and update the account assignment rules that define each territory's coverage. Running the rules while the model is in planning state generates proposed account-to-territory assignments for review.

Sales operations can then inspect the assigned accounts from the applicable territory detail pages, validate coverage and ownership allocation expectations, and refine the hierarchy or rules as needed. This creates an appropriate review and approval cycle before activation. Once the proposed model and resulting assignments have been verified, the organization can activate the territory model so the approved changes become operational in Sales Cloud. Salesforce documents that planning territory models allow changes to be made and evaluated before activation, and that assignment rules can be run to assign accounts to territories. See Salesforce Help: Plan Territory Changes and Salesforce Help: Run Account Assignment Rules.

QUESTION NO: 37

The marketing department at Universal Containers is migrating from its legacy campaign and email management system to Salesforce and wants to ensure that its communication materials can be migrated as well. What should a consultant recommend to migrate the marketing department's email templates?

A. Enable Email-to-Close and use the Import Wizard.

B. Create an email template change set or use the Lighting Platform.

C. Manually recreate the email and mail merge templates in Salesforce.

D. Enable Email to Salesforce before sending email templates to Salesforce.

ANSWER: C

Explanation:

Manually recreate the email and mail merge templates in Salesforce. Salesforce does not provide a standard data-import process that converts email-template definitions from an external, legacy campaign or email-management application into Salesforce email templates. Email templates are Salesforce metadata and can contain Salesforce-specific features, including merge fields, letterheads or enhanced-letterhead branding, folder access, related-record context, and Lightning Email Template content. Those elements must be configured for the target Salesforce org and its data model rather than loaded as ordinary records through an import tool.

A consultant should therefore inventory the existing communications, identify which templates remain needed, and rebuild the approved templates in the appropriate Salesforce template experience. During recreation, the consultant should map legacy personalization tokens to Salesforce merge fields, verify branding and content, set suitable folder access, and test rendering and merge behavior with representative records. This approach ensures that each template works correctly with

Salesforce campaigns, contacts, leads, and related processes after go-live. Salesforce's guidance on creating and managing email templates is available in [Salesforce Help: Email Templates](); implementation learning is also available through [Trailhead: Implement Email Templates]().

QUESTION NO: 38

Universal Containers has set the organization-wide default to public read-only for accounts, contacts, and opportunities. Activities are set to be controlled by the parent. The ABC Corporation account is owned by a sales user whose profile grants create, read, edit, and delete access to accounts, contacts, and opportunities.

Which two actions does the owner of the ABC Corporation account have the right to take? Choose two answers.

A. View, edit, and delete activities owned by other users directly related to the account.

B. View, edit, and delete related contacts and opportunities owned by other users.

C. Share the account with other users through manual sharing and account teams.

D. Transfer ownership of related contacts and opportunities owned by other users.

ANSWER: A C

Explanation:

"View, edit, and delete activities owned by other users directly related to the account" is correct because activity access is configured as Controlled by Parent. With this setting, access to a task or event follows access to its related parent record. As the owner of the ABC Corporation account, the sales user has the stated full object-level permissions on Accounts and can edit and delete that account record. Therefore, the user can access and manage activities directly related to that account, even when another user owns the activity. Salesforce documents how organization-wide defaults and parent-controlled access determine record visibility and access behavior at Organization-Wide Defaults.

"Share the account with other users through manual sharing and account teams" is also correct. A record owner can manually share their account record to grant other users or groups additional access. The account owner can also use an account team to define users who work on the account and assign appropriate access to the account and its related records. Account teams are specifically intended to support collaborative account work while preserving controlled access. Salesforce describes the account-team model and its access capabilities at Account Teams.

QUESTION NO: 39

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: A C

Explanation:

"One set of opportunity stages" is appropriate because Opportunity Stage is a shared picklist at the org level. Cloud Kicks can define a consolidated list containing every stage needed across the three product lines, including the stages that overlap. This supports consistent reporting, forecasting, probability management, and stage-based automation wherever the same stage has the same business meaning. The sales process configuration can then control which of those shared stage values users see for each methodology, so a product line is not forced to use stages that do not apply to it.

"Three record types" is appropriate because each product line has its own sales methodology. An Opportunity record type can be associated with the applicable sales process, which presents the relevant subset of stages for that product line. Record types also provide a scalable way to apply product-line-specific business processes, page layouts, and picklist value availability while retaining one common Opportunity object and a unified stage value set. The consultant should create one record type per distinct product-line methodology and map each one to its corresponding sales process. Salesforce documents that sales processes determine the Opportunity stage values available to users and that record types associate business processes with records: Salesforce Help: Define Sales Processes and Salesforce Help: Record Types.

QUESTION NO: 40

Cloud Kicks (CK) has organization-wide defaults set to Public Read-Only for Opportunity. One of the Account Team roles at CK Is Executive Sponsor. Account Team members with the Executive Sponsor rote need Read/Write access to all child Opportunities.

How should the consultant meet the requirement?

A. Create an Opportunity snaring rule to grant Read/ Write access to Opportunities.

B. Create a flow to grant Read/Write access to Opportunities.

C. Create an Account sharing rule to grant Read/Write access to Opportunities.

D. Set Opportunity Access to Read/Write for Executive Sponsor Account Team members.

ANSWER: D

Explanation:

Set the Opportunity Access level to Read/Write for each Account Team member assigned the Executive Sponsor role. Account Teams provide record-level access to an account and its related records, including opportunities. When an Executive Sponsor is added to an account team, the administrator or record owner can assign Read/Write Opportunity Access as part of that team-member entry. This grants the member edit access to all opportunities related to that account, including access beyond the organization-wide default of Public Read-Only. The Account Team role identifies the member's relationship to the account, while the Opportunity Access setting controls the level of access granted to that account's child opportunity records. For recurring assignments, users can also use default account teams to streamline adding the appropriate members and their access levels. Salesforce documents that account team members can be granted access to the account's related opportunities through the Opportunity Access field. See Salesforce Help: Create Account Teams and Trailhead: Control Access to Records.

QUESTION NO: 41

A consultant is implementing a new Sales Cloud instance for Cloud Kicks (CK) that

has a public sharing model for Accounts. Different sales reps own local Accounts that create a

multi-level Account Hierarchy. CK needs to see the total number of closed won opportunities

and the revenue value for all Accounts in the hierarchy when viewing 2 Parent Account.

Which recommendation meets this requirement?

A. Configure an after-save flow to update a custom field on the parent Account with the total value of opportunities from the child Accounts.

B. Create a Roll-Up Summary field on the parent Account with the total value of won Opportunities from the child Accounts

C. Create a workflow rule to update the custom field on the parent Account with the total value of won Opportunities from the child Accounts

D. Use the View Account Hierarchy option and include a custom Roll-Up Summary field with the total value of won Opportunities in the displayed columns.

ANSWER: A

Explanation:

Configure an after-save flow to update a custom field on the parent Account with the total value of opportunities from the child Accounts. This approach is appropriate because an Account Hierarchy is built through the Account Parent Account lookup relationship, while Opportunities relate to Accounts through a lookup relationship. The required totals must include opportunities owned by Accounts at multiple levels of that hierarchy, so the solution needs automation that can calculate the qualifying Closed Won opportunity count and revenue, store the results on the relevant parent Account, and propagate recalculated values upward when an Opportunity or Account relationship changes. A record-triggered after-save flow can perform the required cross-record updates after the triggering record is committed. The flow should evaluate the Closed Won criteria, aggregate the applicable opportunity values for each Account, and update custom summary fields on parent Accounts so that users see the hierarchy-level totals directly on the parent record. It should also be designed to handle changes to opportunity amount, stage, Account assignment, and parent-account relationships, ensuring stored totals remain accurate. Salesforce describes record-triggered flows and their use for actions that occur after records are saved in Record-Triggered Flows. The hierarchy's Parent Account relationship is covered in Salesforce's Account Hierarchy documentation.

QUESTION NO: 42

Sales management at Universal Containers is concerned that pipeline and forecasting reports are inaccurate because sales representatives are creating opportunities after they are closed/won. Which two solutions will help sales management identify and address the issue? Choose two answers.

A. Run the opportunity pipeline standard report to view the upcoming opportunities by stage.

B. Use a workflow rule to email sales management when the opportunity is created in the closed/won stage.

C. Create a report that displays opportunities that have a closed date less than or equal to the created date.

D. Create a workflow rule that automatically updates the opportunity to the first stage in the sales process.

ANSWER: B C

Explanation:

Using a workflow rule to email sales management when the opportunity is created in the closed/won stage provides an immediate exception alert. The rule can evaluate a newly created opportunity whose Stage is Closed Won and send an email notification to the appropriate management recipients. This allows management to investigate the record promptly, determine whether the opportunity was entered late, and reinforce the expected sales-process behavior. Salesforce workflow rules can evaluate records when they are created and perform email-alert actions when their criteria are met.

Creating a report that displays opportunities with a close date less than or equal to the created date provides a repeatable way to identify records likely entered after the sale was already completed. Comparing these dates highlights opportunities that could distort historical pipeline and forecast reporting because they were not present while progressing through the normal sales stages. Management can run, schedule, or subscribe to this report to monitor the pattern and use the results for coaching, data cleanup, or process follow-up. Salesforce reports support filters and report criteria that narrow results to records meeting specified field conditions.

See Salesforce documentation on workflow rules and defining report criteria.

QUESTION NO: 43

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

Which attribution method should the consultant recommend?

A. Opportunity Percent field

B. Opportunity Overlay Split

C. Opportunity Currency field

D. Opportunity Revenue Split

ANSWER: D

Explanation:

Opportunity Revenue Split is the appropriate attribution method because it distributes an opportunity's revenue credit among the opportunity team members using percentages. Each person can be assigned an individual percentage that is less than 100%, while the combined revenue-split percentages for the opportunity represent the full revenue attribution. Salesforce calculates each member's revenue-split amount from the opportunity amount and that member's assigned percentage, giving representatives visibility into both the individual percentage and the associated credited revenue amount.

This approach is designed for shared selling situations in which multiple contributors should receive proportional credit for a deal. For example, a sales representative could receive 70% credit and a supporting representative could receive 30% credit; each team member's percentage is visible on the opportunity's related splits information. Administrators can enable Opportunity Splits and configure the available split types so users can add and manage these allocations consistently. Salesforce documents that revenue splits are used to divide revenue credit across team members and are expressed as a percentage of the opportunity amount. See Salesforce Help on Opportunity Splits and the Salesforce Trailhead module Opportunity Splits Basics.

QUESTION NO: 44

Cloud Kicks has enabled Orders to track and manage customer requests for products. The sates team has requested a process to return or reduce the quantity of activated Orders.

Which two Salesforce features should a consultant recommend to meet this requirement

Choose 2 answers

A. Enable Orders without Price Books.

B. Enable Zero Quantity Orders.

C. Enable Negative Quantity for Order Products.

D. Enable Reduction Orders.

ANSWER: C D

Explanation:

Enable Negative Quantity for Order Products and **Enable Reduction Orders** support post-activation changes involving returns and quantity reductions. Reduction orders are specifically designed for adjustments to an activated order. A user creates a reduction order from the original activated order, selecting products and quantities to reduce; this provides an auditable record of the adjustment while preserving the original order. For a full or partial return, the adjustment is represented with negative product quantities. Enabling negative quantities for order products permits those return quantities to be recorded correctly on the order-related product lines. Together, these features allow the sales team to process either a reduction in the quantity originally ordered or a return after activation, rather than attempting to edit the activated order directly. Salesforce describes reduction orders as the mechanism for reducing quantities or returning products from activated orders, and the negative-quantity setting supports return scenarios. See Salesforce's Reduction Orders documentation and Negative Quantity for Orders documentation.

QUESTION NO: 45

Cloud Kicks is concerned that the sales team is taking longer to dose opportunities in comparison to the same time last year. The VP of sales wants to determine the number of closed deals on a monthly basis and compare the month-over-month results.

Which two actions should the consultant take to meet the requirement?

Choose 2 answers

A. Create a report based on the Opportunity reporting snapshot.

B. Create a dashboard component and schedule the dashboard to refresh monthly.

C. Schedule a reporting snapshot of the Opportunity History object to run monthly.

D. Schedule a reporting snapshot of the Opportunity object to run monthly.

ANSWER: A D

Explanation:

"Schedule a reporting snapshot of the Opportunity object to run monthly" is correct because reporting snapshots preserve the results of a source report at a scheduled point in time. The consultant can build a source report on opportunities that filters for closed deals, includes the fields needed for monthly analysis, and schedules the snapshot to run every month. Each run writes the report's aggregate or detail results to the snapshot's target custom object, creating a historical record rather than relying solely on the current state of opportunity records.

"Create a report based on the Opportunity reporting snapshot" is also correct because the stored snapshot records must be reported on to compare the monthly values. A report using the reporting snapshot's custom report type can group records by the snapshot run date or another month field and show the count of closed deals for each period. This provides the month-over-month trend requested by the VP of Sales, including the ability to compare prior periods after opportunity data has changed. Salesforce describes reporting snapshots and their scheduled capture of report results in its Reporting Snapshots overview and documents how to create reporting snapshots.

QUESTION NO: 46

Cloud Kicks recently purchased Salesforce, and the leadership team is excited about being able to forecast more accurately. Sales managers say that making updates to forecasted

amounts during the pipeline meetings is time consuming, and it is difficult to review all of the committed opportunities within the meeting time.

What should the consultant recommend to help make meetings more efficient while making real-time forecast updates?

A. Use in-line editing to update the forecast amount for records.

B. Modify multiple opportunities at one time in the Forecast page.

C. Tell reps to use the list view to move opportunities between stages.

ANSWER: B

Explanation:

Modify multiple opportunities at one time in the Forecast page. is the appropriate recommendation because the Forecasts page is designed to give sales teams a consolidated workspace for reviewing forecast information and the opportunities that contribute to it. During a pipeline meeting, a manager can focus on a forecast category, such as Commit, review the underlying opportunities, and make the needed updates from the forecast workspace rather than repeatedly opening separate opportunity records. This keeps the conversation centered on the team's current forecast and reduces navigation overhead while the meeting is in progress.

Forecasts also support manager visibility into a subordinate's forecast and its contributing opportunity details. That visibility is particularly useful when the meeting agenda requires reviewing committed deals quickly and making real-time adjustments based on the discussion. The consultant should first ensure that Collaborative Forecasts is enabled and that the forecast type, hierarchy, and user permissions reflect Cloud Kicks' sales process. Salesforce describes the forecasting workspace and forecast hierarchy in its [Collaborative Forecasts overview](). Guidance on reviewing forecast details and contributing opportunities is available in Salesforce's [View Forecasts]() documentation.

QUESTION NO: 47

Sales managers at Cloud Kicks need to show reports and dashboards with Opportunity Forecast by Product family with team Quotas.

Which solution should a consultant recommend?

A. Create a Joined report with dosed Opportunities, Forecasting Items, and Quotas.

B. Configure Quotas with a Product family report and add necessary fields.

C. Create a custom report type with Forecasting Quotas and Forecasting Items.

ANSWER: C

Explanation:

Create a custom report type with Forecasting Quotas and Forecasting Items. This solution provides the report-data structure needed to bring quota information together with forecast-item information in a single report. Forecasting Items represent the values used in collaborative forecasts, including dimensions relevant to forecast reporting such as the forecast period, owner or forecast hierarchy, and product-family forecasting data when product-family forecasts are enabled. Forecasting Quotas supplies the quota values associated with the applicable users and periods.

With a custom report type based on these related forecasting records, the consultant can expose the required fields to report builders and create a report grouped by product family and team. The report can then be added to a dashboard so managers can compare forecasted opportunity amounts against team quotas in a consistent view. This approach is especially appropriate when the required combination of forecasting data is not available from a single standard report type. Administrators should ensure Collaborative Forecasts, the relevant forecast type, product-family forecasting, and quotas are configured before building the report.

For Salesforce guidance on report types, see [Salesforce Trailhead: Report Types](). For forecasting setup and concepts, see [Salesforce Trailhead: Collaborative Forecasts]().

QUESTION NO: 48

To properly plan for company growth, Cloud Kicks needs to forecast monthly revenue projections from the sales of its annual subscription service.

What should the consultant configure to meet this requirement?

A. Opportunity products with monthly product Schedules

B. Opportunity products with formula fields for each month's value

C. Opportunity dashboard showing opportunities closed each month

D. Opportunity dashboard showing products sold each month

ANSWER: A

Explanation:

Opportunity products with monthly product Schedules is the appropriate configuration because Salesforce product schedules let a consultant allocate the revenue associated with an opportunity product across defined time periods. For an annual subscription, a monthly revenue schedule can divide the product's total revenue into monthly scheduled amounts, creating the period-by-period forecast data needed for growth planning. These schedule records are associated with the opportunity line item, so the projections remain tied to the specific subscription product and sales opportunity rather than being maintained separately. Salesforce supports revenue schedules for products and allows schedules to be established with a monthly frequency, enabling consistent recurring-revenue projections across the subscription term. After the schedules are created, the scheduled revenue can be surfaced in reporting to analyze expected revenue by month and support management forecasting. This approach also provides a scalable, standardized process: when sales users add the subscription product to an opportunity, the relevant schedule can be applied to represent its recognized or projected revenue over the year. Salesforce documents opportunity-product schedule records and their relationship to opportunity line items in the OpportunityLineItemSchedule object reference, and describes product schedules in Salesforce Help.

QUESTION NO: 49

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 seasonal release and change management is centered on planning changes with the people affected, preparing the organization for the release, and providing a predictable way to build and deploy enhancements. **Collect input from stakeholders.** ensures that release planning accounts for business priorities, process impacts, dependencies, and the needs of the teams that will use the solution. This input helps the release team identify the changes that deliver meaningful value and anticipate adoption risks.

Communicate updates to end user. is essential to adoption because users need timely, audience-specific information about what is changing, when it will be available, how it affects their work, and where they can get support. Clear release communications reduce surprise and help users prepare for new functionality.

Create an org development model. provides the controlled framework needed to develop, test, validate, and deploy changes across Salesforce environments. A defined development lifecycle supports quality, reduces production risk, and makes release activities repeatable. Salesforce recommends establishing change-management processes and involving stakeholders throughout implementation and adoption efforts. See Salesforce Trailhead: Change Management and Salesforce Help: Sandboxes and Development.

QUESTION NO: 50

The sales director at Universal Containers wants to ensure that a custom field on the Lead object is excluded from Einstein Lead Scoring.

How should the consultant meet the requirement?

A. Clear the custom field values on Lead records.

B. Omit the custom field from the Scoring Model.

C. Remove the custom field from Lead page layouts.

ANSWER: B

Explanation:

Omit the custom field from the Scoring Model. Einstein Lead Scoring uses the fields selected for its scoring model to identify the attributes and activities that correlate with lead conversion. A consultant can control the model's input by configuring the eligible Lead fields in Einstein Lead Scoring setup. Leaving the custom field out of that configuration prevents its values from being used as a predictor when Einstein generates or refreshes lead scores. This is the appropriate approach because the requirement concerns the data evaluated by the scoring model itself, rather than the field's data values or its visibility to users. After changing the field selection, the consultant should allow Salesforce to rebuild or update the scoring model as applicable, then validate that the scoring configuration contains only the intended fields. Salesforce also provides score explanations so sales users can understand the factors associated with a lead's score; excluding the field from the model ensures it is not part of those model-driven factors. For setup and model configuration guidance, see Salesforce Help's Einstein Lead Scoring documentation and the Learn About Einstein Lead Scoring Trailhead module.