

Salesforce

Exam Questions CRT-251

Salesforce Certified Sales Cloud Consultant (SU18)



NEW QUESTION 1

Universal Containers' current solution for managing its forecasts is cumbersome. The sales managers do NOT have visibility into their teams' forecasts and are NOT able to update the forecasts. As a result, the managers are continually asking their sales representatives to provide updated forecast data via email or phone. Which two solutions should a consultant recommend to help Universal Containers improve the management of their forecasts? Choose two answers.

- A. Enable override forecast permission in the Manager's profile.
- B. Configure weekly customized forecast reports and dashboards to be emailed to sales management.
- C. Create a forecast hierarchy and assign managers to the forecast manager role.
- D. Create forecast Chatter groups where sales representatives can post and share their forecasts.

Answer: AC

NEW QUESTION 2

Universal Containers has a customer base that includes both individual consumers and businesses. The company has implemented Person Accounts in Salesforce and has a custom object for "Policies" that needs to relate to both Person Accounts and business accounts. What is the minimum configuration on the policy custom object needed to meet this requirement?

- A. Create a contact lookup field and an account lookup field.
- B. Create a master-detail account relationship.
- C. Create a custom contact lookup field.
- D. Create a master-detail contact relationship.

Answer: B

NEW QUESTION 3

Universal Containers has automated the process of creating new account records in Salesforce. All accounts records created through this process are owned by a generic user. There are now two million account records that have been created in this manner. Universal Containers is now seeing performance issues when it makes any changes to account sharing rules.

What can Universal Containers do to address the issue without changing its integration?

- A. Set the organization-wide defaults for accounts to public read/write.
- B. Contact Salesforce support to add an index to the account object.
- C. Ensure that the generic user has the Modify All Data permission.
- D. Ensure that the generic user has NOT been assigned to a role.

Answer: D

NEW QUESTION 4

Universal Containers recently completed the implementation of a new Sales Cloud solution. The stakeholder committee believes that sales user adoption is best measured by the number of daily logins. Which two measures of sales user adoption should be considered? Choose two answers.

- A. Number of reports exported to Excel for analysis
- B. Number of neglected opportunities over time by role
- C. Completeness of records entered into the new system
- D. Overall effectiveness of mass email campaigns

Answer: BC

NEW QUESTION 5

Universal Containers wants to equip its sales team with mobile capabilities. The sales team needs to quickly look up contacts, accounts, and opportunities and easily log calls. Due to limited coverage in certain geographic areas, the sales team wants access to customer information even without an Internet connection. Which mobile solution is appropriate for the Universal Containers' sales team?

- A. Salesforce Mobile app
- B. SalesforceA App
- C. Custom hybrid App
- D. Salesforce Touch App

Answer: A

NEW QUESTION 6

Universal Containers has a public sharing model for accounts and uses the parent account field to create a multi-level account hierarchy. When viewing a parent account, the company wants to see the total value of open opportunities for all accounts in the hierarchy. Which solution should a consultant recommend to meet this requirement?

- A. Use Apex to update a custom field on the parent account with the total value of open opportunities from the child accounts.
- B. Create a roll-up summary field on the parent account showing the total value of open opportunities from the child accounts.
- C. Define a workflow rule to update the custom field on the parent account with the total value of open opportunities from the child accounts.
- D. Create a link on the account that opens a report showing the total value of open opportunities for all accounts in the hierarchy.

Answer: A

NEW QUESTION 7

Universal Containers has enabled Advanced Currency Management.

How is the converted amount data reported on a report that spans time periods when the exchange rate was different?

- A. Converted amounts are based on exchange rates that use the oldest entry.
- B. Converted amounts are based on the exchange rates entered in the opportunity.
- C. Converted amounts are based on exchange rates that use the current entry.
- D. Converted amounts are based on the historical exchange rate associated with the close date.

Answer: D

NEW QUESTION 8

Universal Containers wants to prevent sales users from modifying certain opportunity fields when the sales stage has reached Negotiation/Review. However, sales directors must be able to edit these opportunity fields in case last minute updates are required. Which solution should a consultant recommend?

- A. Modify the profile for sales directors to enable the "Modify All" object permission for opportunities.
- B. Change the field-level security for sales representatives to restrict field access based on the sales stage.
- C. Create a validation rule to enforce field access based on the sales stage and a custom permission.
- D. Create a workflow rule to enable field access for sales directors based on the sales stage.

Answer: C

NEW QUESTION 9

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: BC

NEW QUESTION 10

Universal Containers is devising a separate sales methodology to upsell service contracts to its existing customer base. The company wants to track and report on these deals separately from other deals.

What should a consultant recommend to meet this requirement?

- A. Create a custom field on opportunity to flag and report on these sales.
- B. Create an opportunity record type and sales process for reporting on these deals.
- C. Create a separate page layout and report to flag and report on these deals.
- D. Add "upsell" as a stage and create a summary by opportunity stage.

Answer: B

NEW QUESTION 10

The members of an opportunity team at Universal Containers are working together to close an opportunity. The sales engineer on the team is having trouble keeping up with the active quote. How can the sales engineer identify the opportunity's active quote?

- A. Reference the last modified date on the quotes.
- B. Reference the synced quote field on the opportunity record.
- C. Reference synced quote history on the opportunity.
- D. Follow the opportunities' quotes in Chatter.

Answer: B

NEW QUESTION 13

Universal Containers has a private sharing model and wants the ability to share documents related to an opportunity, such as contracts and proposals, with the field sales team.

How can the documents be shared efficiently and securely?

- A. The documents should be uploaded to Salesforce Files and shared with the field sales organization.
- B. The documents should be emailed to the sales team on the opportunity record.
- C. The documents should be uploaded to Salesforce Files from the opportunity record.
- D. The documents should be uploaded to a library that is shared with the field sales organization.

Answer: A

NEW QUESTION 18

Universal Containers has a customer base of over 15,000 Accounts and 60,000 Contacts. The marketing manager wants to use the customer data for an upcoming new product launch but is concerned contacts may have moved to different companies.

What should a consultant recommend to ensure customer data is accurate?

- A. Use a data cleansing tool and the Stay-in-Touch feature of Salesforce to email contacts.
- B. Create a workflow rule for an account and contact owner to confirm contact data.
- C. Create a workflow rule to mass email the contacts and capture any email bounces.
- D. Use a data enrichment tool to verify account and contact data is up-to-date.

Answer: A

NEW QUESTION 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: AD

NEW QUESTION 22

Universal Containers is moving from a legacy customer relationship management (CRM) system to Salesforce Sales Cloud. What should a consultant recommend to ensure a successful implementation?

- A. Review the current system with all levels of users to understand their requirements.
- B. Review the current system with executive management to understand their requirements.
- C. Review the current system with IT management to understand their requirements.
- D. Review the current system and configure Sales Cloud to work in the same way.

Answer: A

NEW QUESTION 24

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

NEW QUESTION 25

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