Question 1

The Director of Advising wants to understand what students say are the most common reasons for scheduling advising appointments.

What should the consultant include in a report to meet the requirement?

Options:

A- Case Reason

B- Appointment Topic

C- Alert Reason

Answer:

B

Explanation:

Understanding Student Advising Reasons:

The Appointment Topic field in advising appointments captures the reasons students schedule these appointments.

This field provides insights into the common topics and concerns addressed during advising sessions.

Reporting on Appointment Topics:

Create a Report: Go to the Reports tab in Salesforce and create a new report based on the advising appointment object.

Add Fields: Include the Appointment Topic field to capture the reasons for the appointments.

Filter Data: Apply filters to include relevant appointment records.

Analyze Results: Use the report to analyze and summarize the most common reasons for advising appointments.

Steps to Create the Report:

Navigate to Reports: Log in to Salesforce and go to the Reports tab.

Create New Report: Select the appropriate report type for advising appointments.

Add Fields: Include the Appointment Topic field.

Run and Save Report: Run the report to view the data and save it for future reference.

Salesforce Documentation: Creating Reports and Dashboards

Question 2

A consultant is working with a customer who already uses Salesforce and wants to enable Education Cloud. The consultant has confirmed that Education Cloud can work in the customer's existing environment.

Starting in a sandbox, which location should the consultant visit to enable Education Cloud in the existing environment?

Options:

A- App Launcher

B- Setting

C- My Account

Answer:

B

Explanation:

Enabling Education Cloud in Existing Environment:

To enable Education Cloud in an existing Salesforce environment, the consultant needs to start by configuring the necessary settings within the Salesforce setup.

Steps to Enable Education Cloud:

Access Setup: Log in to the Salesforce org and navigate to Setup.

Search for Education Cloud Settings: In the Quick Find box, type 'Education Cloud' and select the relevant settings to enable the features.

Configure Features: Enable and configure the desired Education Cloud features such as Student Success Hub, Admissions Connect, and more.

Testing in Sandbox: Initially, perform these steps in a sandbox environment to ensure everything works correctly before deploying to production.

Verification:

Ensure all necessary Education Cloud components are enabled and configured correctly.

Conduct thorough testing in the sandbox to validate functionality.

Salesforce Help: Enable Education Cloud

Question 3

Question Type: **MultipleChoice**

A university is planning an enterprise-wide implementation of Education Cloud. It has asked the consultant to do an analysis of Education Cloud functionality to identify additional apps it may need to purchase.

What is a standard feature of Education Cloud?

Options:

A- Student Advising

B- Event Management

C- Order Management

Answer:

A

Explanation:

Student Advising is a standard feature of Education Cloud. It provides tools and functionalities to manage student advising processes, track student progress, and facilitate communication between advisors and students.

Features of Student Advising:

Advising Notes: Keep track of discussions and recommendations.

Appointment Scheduling: Allows students to schedule appointments with advisors.

Case Management: Manage and track advising cases and interventions.

Implementation:

Configure Advising Settings: Set up advising schedules, roles, and permissions.

Training: Provide training for advisors on using the advising tools within Education Cloud.

Monitoring and Reporting: Use dashboards and reports to monitor advising activities and student progress.

Salesforce Education Cloud Documentation: Student Success Hub

Question 4

Question Type: **MultipleChoice**

The Alumni Association is interested in using Education Cloud to support its operations. The Association tracks what engages alumni and their hobbies.

Which Education Cloud feature should the consultant recommend?

Options:

A- Interest Tags

B- Relationships

C- Activity Timeline

Answer:

A

Explanation:

Tracking Engagement and Hobbies:

Interest Tags in Education Cloud allow the tracking of specific interests and hobbies of alumni.

This feature helps in understanding what engages alumni and can be used to tailor communications and activities.

Setting Up Interest Tags:

Define Interest Tags: Create tags that represent different interests and hobbies.

Assign Tags: Assign these tags to alumni based on their interests and engagement history.

Utilizing Interest Tags:

Segmentation: Use Interest Tags to segment alumni for targeted communications and events.

Personalized Outreach: Tailor outreach efforts based on the specific interests and hobbies tracked by the tags.

Implementation Steps:

Configure Tags: Set up and define the tags in the system.

Data Entry: Tag alumni with the appropriate interests.

Analyze Engagement: Use reports and analytics to understand the impact of interest-based engagement.

Salesforce Education Cloud Documentation: Interest Tags

Question 5

Question Type: **MultipleChoice**

A university Advancement office uses the Education data Architecture (EDA).

Which EDA functionality should the Advancement office use to track historical data for targeted outreach and donation opportunities?

Options:

A- Affiliation

B- Relationship

C- Attribute

Answer:

A

Explanation:

Tracking Historical Data with EDA:

The Affiliation object in EDA is used to track historical data related to relationships between individuals and organizations (such as alumni and the university).

Using Affiliations for Targeted Outreach:

Create Affiliations: Set up affiliations for alumni to capture historical data such as past donations, engagement activities, and more.

Targeted Outreach: Use the data from affiliations to segment alumni for targeted outreach and donation opportunities.

Implementation Steps:

Configure Affiliations: Ensure that the Affiliation object is configured correctly to capture the necessary historical data.

Data Entry: Enter historical data into the Affiliation records.

Reporting and Analysis: Create reports and dashboards to analyze affiliation data and identify potential outreach opportunities.

Salesforce EDA Documentation: Affiliations

Question 6

The Advancement office is evaluating the capabilities of Education Cloud. The office needs to ingest, harmonize, and analyze batch data from its Education Cloud org and other systems.

Which solution should the consultant recommend?

Options:

A- Flow with evocable action

B- Data Cloud

C- Data Processing Engine

Answer:

B

Explanation:

Data Integration and Analysis:

Data Cloud (formerly known as Salesforce Customer 360 Data Manager) is designed for ingesting, harmonizing, and analyzing data from multiple sources.

It provides a centralized platform to manage batch data from Education Cloud and other systems.

Capabilities of Data Cloud:

Data Ingestion: Ability to import data from various sources including Education Cloud, ERP systems, and other databases.

Data Harmonization: Standardizes and merges data to create a unified view.

Data Analysis: Offers tools to analyze and visualize the harmonized data for insights.

Implementation Steps:

Enable Data Cloud: Work with Salesforce support to enable Data Cloud for your org.

Configure Data Sources: Set up connections to the various data sources.

Define Data Models: Create data models to harmonize data from different systems.

Setup Data Integration: Configure data integration processes to regularly ingest and update data.

Analyze Data: Use Data Cloud's analytics tools to generate insights from the unified data.

Salesforce Documentation: Salesforce Data Cloud

Question 7

Question Type: **MultipleChoice**

An institution's office of Career service wants to solution that allows student to schedule appointments with nay available counselor directly from a portal.

On which object is the availability configured?

Options:

A- Goal Definition

B- Benefit schedule

C- Case

Answer:

B

Explanation:

Configuring Availability for Appointments:

The Benefit Schedule object is used in Education Cloud to manage availability for scheduling appointments.

This allows the institution to set up availability slots that students can book directly through a portal.

Setting Up Benefit Schedule:

Navigate to Setup: Go to the Salesforce Setup menu.

Create Benefit Schedules: Define the availability slots for counselors by creating Benefit Schedules.

Assign Benefit Schedules: Link these schedules to the respective counselors.

Integration with Portals:

Ensure that the portal used by students is configured to display available slots from the Benefit Schedule object.

Students can then book appointments directly based on the availability set in the Benefit Schedules.

Training and Adoption:

Provide training to counselors on managing their availability through Benefit Schedules.

Ensure students are aware of how to book appointments through the portal.

Question 8

Question Type: **MultipleChoice**

The director of graduate recruitment is interested in Education Cloud. Recruitment staff need to access Opportunity and Campaign Member information about students. The IT director is concerned about costs and suggests using other license types for full-time recruitment users.

What should the consultant discuss with the client?

Options:

A- The business use case requires a Salesforce Platform license.

B- The business use case requires a full Salesforce license.

C- Education Cloud requires a Customer Community license.

Answer:

B

Explanation:

Understanding Licensing Requirements:

Full-time recruitment staff need access to Opportunity and Campaign Member objects, which are part of core Salesforce functionalities.

Salesforce Platform licenses have limitations on access to certain standard objects such as Opportunities and Campaigns, which are essential for the recruitment use case.

Business Use Case for Full Salesforce License:

Opportunity Management: Recruitment staff need to manage opportunities related to student admissions and engagement.

Campaign Management: Access to Campaign Members allows recruitment staff to track and manage student participation in various recruitment campaigns.

Advanced CRM Functionalities: Full Salesforce licenses provide access to all Salesforce CRM capabilities, which are necessary for comprehensive recruitment operations.

Cost Considerations:

While full Salesforce licenses are more expensive than platform licenses, they provide the necessary functionality without limitations.

Discuss potential volume discounts or bundling options with Salesforce to mitigate costs.

Implementation Steps:

License Assignment: Ensure that full Salesforce licenses are assigned to recruitment staff.

Training: Provide training to recruitment staff on how to effectively use Opportunities and Campaign Members.

Customization: Customize Salesforce to meet specific recruitment needs, leveraging Opportunities and Campaign functionalities.

Salesforce Licensing Guide: Salesforce Licenses

Question 9

A Recruitment department wants to centralize its recruitment efforts and application operations, and engage with students through social channels like WhatsApp.

Which solution set should the consultant recommend?

Options:

A- Service Cloud and Digital Engagement

B- Education Cloud and Marketing Cloud

C- Education Cloud and Slack

Answer:
C

Explanation:
Centralizing Recruitment Efforts: Service Cloud provides a robust platform for managing and automating recruitment processes, including case management, communication tracking, and applicant management.

Digital Engagement: The Digital Engagement add-on for Service Cloud enables institutions to engage with students through various social channels, including WhatsApp, SMS, and more.

Solution Set Benefits:

Service Cloud: Offers tools for managing and automating recruitment processes, tracking applicant progress, and maintaining communication logs.

Digital Engagement: Facilitates multi-channel communication, allowing recruitment teams to interact with students on their preferred platforms like WhatsApp.

Implementation Steps:

Enable Service Cloud: Ensure Service Cloud is enabled in the org.

Set Up Digital Engagement:

Navigate to Setup and enable Digital Engagement.

Configure channels such as WhatsApp, SMS, etc., by following the setup wizards and integrating them with the existing Service Cloud setup.

Customize to Fit Recruitment Needs: Tailor the solution to meet specific recruitment workflows and requirements.

Training and Adoption: Provide training to the recruitment team on how to use the new tools and monitor adoption to ensure they leverage the system effectively.

Salesforce Documentation: Service Cloud

Salesforce Documentation: Digital Engagement

Question 10

Question Type: MultipleChoice

A university is migrating from its Education Data Architecture org to Education Cloud.

Which consideration should the consultant discuss with the university?

Options:

A- Education Cloud uses the Household Account model.

B- Education Cloud uses the Administrative Account model

C- Education Cloud uses Person Accounts.

Answer:

B

Explanation:

Understanding Account Models in Education Cloud: Education Cloud typically uses the Administrative Account model to manage relationships and hierarchies between contacts (students, parents, etc.) and accounts (departments, institutions, etc.).

Administrative Account Model: This model allows educational institutions to maintain a structured and organized view of their data, which is essential for managing various relationships and processes within the institution.

Migration Considerations:

Data Mapping: Map existing data fields from the previous Education Data Architecture (EDA) to the new Administrative Account model.

Customizations: Ensure that any custom objects or fields are compatible with the Administrative Account model.

Testing: Rigorously test the migrated data to ensure integrity and accuracy.

Steps to Implement:

Data Export: Export data from the EDA org.

Data Transformation: Transform the data to fit the Administrative Account model structure.

Data Import: Import the transformed data into the new Education Cloud instance.

Validation: Verify that the data aligns with the Administrative Account model and functions as expected.

Salesforce Education Cloud Documentation: Salesforce Help: Administrative Account Model

Question 11

Question Type: **MultipleChoice**

A university wants to use Education Cloud for student Advertising and support services.

After enabling Education Cloud and Student Success, what should the consultant do next to set up the org?

Options:

A- Turn on Care Plans

B- Enable Academia operations.

C- Check the permission set licenses.

Answer:

C

Explanation:

Enabling Education Cloud and Student Success Hub: Once Education Cloud and Student Success Hub are enabled, the next critical step is ensuring that the correct permission sets and licenses are in place.

Permission Set Licenses: Permission set licenses are crucial as they determine the specific features and functionalities that users can access within Salesforce. Ensuring the right permissions are granted helps in managing data access and user roles effectively.

Configuration Steps:

Navigate to Setup.

In the Quick Find box, type Permission Set Licenses.

Verify that the appropriate licenses are available and assign them to users as needed.

Assigning Permission Sets:

Go to Setup > Permission Sets.

Review and assign the necessary permission sets (e.g., Student Success Hub) to the relevant users.

Validation: Ensure that users have the correct access by logging in as a user and checking if they can see and interact with the necessary components of Education Cloud.

Salesforce Education Cloud Documentation: Salesforce Help: Permission Set Licenses

Question 12

Question Type: **MultipleChoice**

University department staff members want to track communication efforts and attendance for the annual commencement ceremony. They need to report on the engagement results of different types of communication methods (email, printed invitations, and so forth).

Which of these features should the consultant recommend?

Options:

A- Campaign Member Status

B- Salesforce Inbox

C- Campaign Influence

D- Experience Cloud Audience

Answer:

D

Explanation:

The consultant should recommend Campaign Member Status as a feature to track communication efforts and attendance for the annual commencement ceremony and report on the engagement results of different types of communication methods for the university department staff members. Campaign Member Status is a feature that allows users to define and track the status or response of a campaign member for a specific campaign, such as Sent, Opened, Clicked, or Attended. Campaign Member Status can help the university department staff members track communication efforts and attendance for the annual commencement ceremony and report on the engagement results of different types of communication methods by using features such as custom statuses, member status values, or campaign reports. Salesforce Inbox, Campaign Influence, or Marketing Cloud are not features that can track communication efforts and attendance for the annual commencement ceremony and report on the engagement results of different types of communication methods for the university department staff members. Reference:

https://help.salesforce.com/s/articleView?id=sf.campaigns_member_status.htm&type=5

https://trailhead.salesforce.com/en/content/learn/modules/campaign_basics/campaign_basics_member_status