Free Questions for Sales-Cloud-Consultant by certsdeals

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Question 1

Question Type: **MultipleChoice**

Cloud Kicks uses an external Enterprise Resource Planning (ERP) application to process its orders. The ERP application needs to receive data about opportunities when the opportunity closes.

Which solution should the consultant recommend?

Options:

A- Salesforce Connect

B- Outbound Message with record-triggered flow

C- External Relationship with custom object

Answer:

B

Explanation:

An Outbound Message combined with a record-triggered flow is an effective solution for sending data about opportunities to an external ERP application when an opportunity is closed. This approach allows Salesforce to send a message containing the opportunity data to a specified endpoint whenever an opportunity record meets the specified criteria (e.g., when it is marked as Closed Won). This method ensures real-time integration and data synchronization between Salesforce and the external ERP system.

Outbound Messaging

Record-Triggered Flows

Question 2

Question Type: **MultipleChoice**

Cloud Kicks wants to help its sales reps identify stalled opportunities in a single view.

Which solution should the consultant recommend to meet the requirement?

Options:

A- Use Deal Insets to Pipeline Inspection.

B- Create a screen flow.

C- Create a Lightning Web Component.

Answer:

A

Explanation:

Deal Insights within Pipeline Inspection in Salesforce provides sales reps with a single view to identify and manage stalled opportunities. This feature leverages AI to highlight deals that may require attention based on changes in engagement, activity, and other deal characteristics. It helps sales reps quickly identify which opportunities need follow-up and which are at risk of stalling, providing valuable insights for pipeline management.

Pipeline Inspection and Deal Insights

Deal Insights Overview

Question 3

Question Type: **MultipleChoice**

Cloud Kicks wants to enable Person Accounts.

What does the consultant need to do before enabling Person Accounts?

Options:

A- Set default sharing of Account to Public Read/write.

B- Disable access to Experience Cloud sites during the cutover.

C- Create at least one Account record type.

Answer:

C

Explanation:

Before enabling Person Accounts, it is mandatory to create at least one Account record type in Salesforce. Person Accounts use record types to differentiate between business accounts and individual consumer accounts. This step ensures that the Salesforce org is properly configured to handle Person Accounts, which combine the characteristics of both accounts and contacts.

Enabling Person Accounts

Person Accounts Overview

Question 4

Question Type: **MultipleChoice**

Cloud Kicks (CK) recently completed the first phase of its Sales Cloud implementation. In the next phase, one factor that consultants are considering is whether any of CK's 500 sales agents are using a mobile device or a browser to access Salesforce.

What should the consultants do to efficiently analyze how users are logging in to Salesforce?

Options:

A- Review the login history on the user record.

B- Create a custom report on the User object.

C- Create a User report and filter by login Subtype.

Answer:

C

Explanation:

Creating a User report and filtering by login Subtype is the most efficient way to analyze how users are logging into Salesforce, whether through a mobile device or a browser. The login subtype provides specific information about the method of access, making it easier to assess user behavior and preferences accurately. This approach allows consultants to generate insights without manually reviewing individual login histories.

Login History

Creating Reports on User Logins

Question 5

Question Type: **MultipleChoice**

Universal Containers (UC) does business with a contact associated with a specific account with the contact role of executive. The contact is also on the board of a nonprofit that has requested a charitable donation from UC. UC wants to track the contact on both accounts.

What is the most efficient solution that the consultant should implement to meet the requirement?

Options:

A- Create a new lookup field on the Contact record.

B- Create a new Contact record related to the nonprofit account.

C- Enable the Contact to Multiple Accounts feature.

Answer:

C

Explanation:

The 'Contact to Multiple Accounts' feature in Salesforce allows a single contact to be associated with multiple accounts without the need to duplicate the contact record. This is particularly useful for tracking relationships where a contact has roles in multiple organizations, such as in this scenario where the contact is associated with both a business account and a nonprofit. Enabling this feature provides an efficient solution to manage complex relationships.

Contacts to Multiple Accounts

Enable Contacts to Multiple Accounts

Question 6

Question Type: MultipleChoice

A consultant is addressing Cloud Kicks' performance measurement needs and overcoming challenges within Sales Cloud. Which approach should a consultant adopt?

Options:

A- Rely on general industry standards to determine performance measurement criteria and system architecture.

B- Collaborate closely with the customer to discern their specific performance measurement requirements.

C- Implement standardized performance measurement practices to ensure consistency across Sales Cloud.

Answer:

B

Explanation:

When addressing performance measurement needs, it is crucial for a consultant to collaborate closely with the customer to understand their specific requirements. Each organization has unique goals, challenges, and metrics that are important to them. By working closely with the customer, the consultant can tailor the performance measurement criteria and system architecture to meet their specific needs, ensuring the implementation is aligned with the customer's business objectives.

Understanding Customer Requirements

Question 7

Question Type: MultipleChoice

In a recent management meeting, the VP of sales voiced concern over the current economic environment. To better understand the effectiveness of its marketing efforts, the VP expressed a need to monitor and reduce churn going forward.

Which strategy should a consultant recommend to address the VP's concern?

Options:

A- Create a Historical Trending report.

B- Create an average stage duration by Opportunity report.

C- Create a year over year sales by Account report.

Answer:

A

Explanation:

To monitor and reduce churn effectively, creating a Historical Trending report is recommended. Historical Trending in Salesforce allows you to track changes over time, providing insights into how different factors are affecting churn rates. This type of report helps in understanding trends in customer behavior and the effectiveness of marketing efforts, enabling the VP of sales to make informed decisions to reduce churn.

Historical Trending Reports

Analyzing Data with Historical Trending

Question 8

Question Type: MultipleChoice

The Cloud Kicks global sales team has asked for a simpler way to view and manage its opportunity pipeline. The team is often responsible for hundreds of deals at a time across multiple countries and currencies. The sales reps have suggested using the Kanban view.

What is a consideration when using the Kanban view?

Options:

A- It can roll-up summary fields for Currency fields.

B- It can summarize records by Currency fields.

C- It can display up to 10 fields per card.

Answer:

B

Explanation:

The Kanban view in Salesforce is a visual summary of records in a list view. It allows sales teams to manage their opportunity pipeline by providing a column-based layout where each card represents a record. One important consideration when using the Kanban view is that it can summarize records by Currency fields, which is particularly useful for global sales teams dealing with multiple currencies. This feature helps in quickly understanding the distribution and totals of opportunities across different currencies.

Kanban View in Salesforce

Managing Opportunities with Kanban

Question 9

Question Type: **MultipleChoice**

It is challenging for the sales operations team to provide Universal Containers with accurate and insightful reports due to the poor quality and high volume of Account, Contact, and Lead dat

a. As the team performs data cleansing, productivity has been impacted, leading to Inefficiency and low adoption.

What should the consultant do first?

Options:

A- Create a data management plan and a data quality dashboard.

B- Install and configure a data cleansing app from AppExchange.

C- Use Duplicate Rules to identify and report data quality issues.

Answer:

A

Explanation:

The first step to addressing poor data quality and high volume issues is to create a data management plan and a data quality dashboard. A data management plan outlines the processes and responsibilities for maintaining data quality, including data cleansing and validation procedures. A data quality dashboard provides visibility into data quality issues, helping the team monitor and address them proactively. This approach helps improve data accuracy and enables the sales operations team to produce more reliable and insightful reports, enhancing overall efficiency and adoption.

Data Quality Management

Creating Data Quality Dashboards