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Shared by Preston on 09-08-2024

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Question 1

Question Type: MultipleChoice

Cloud Kicks (CK) is adding hundreds of new accounts to Sales Cloud daily. CK uses an automated process to assign Account owners. If no assignment can be made for an account, it will be routed to a specific user who will manually review and re-assign it at a later date. This user may have thousands of account records assigned.

Which solution should the consultant recommend when CK sets up the new account process?

Options:

A- Place the user in a separate role at the highest level of the role hierarchy.

B- Add the user to a separate role at the lowest level of the role hierarchy.

C- Assign the Modify All Data permission to the user.

Answer:

B

Explanation:

Adding the user to a separate role at the lowest level of the role hierarchy ensures that the manual reviewer does not inadvertently gain access to other users' accounts through role hierarchy-based sharing rules. This setup confines the user's access to only those records explicitly assigned to them, maintaining data security and ensuring proper access control.

Role Hierarchy Best Practices

Managing User Permissions

Question 2

Question Type: **MultipleChoice**

The Cloud Kicks sales team travels frequently and often needs to convert leads while away from the home office.

What should a consultant recommend?

Options:

A- Enable Conversions for the Salesforce mobile app in Lead Conversion settings.

B- Create a Global Action to convert leads vie the Salesforce mobile app.

C- Install an AppExchange package to convert leads via the Salesforce mobile app.

Answer:

B

Explanation:

Creating a Global Action to convert leads via the Salesforce mobile app allows sales reps to efficiently convert leads while on the go. This approach ensures that the functionality is easily accessible from the mobile interface, streamlining the lead conversion process for sales reps who are frequently traveling.

Global Actions Overview

Setting Up Global Actions

Question 3

Question Type: MultipleChoice

At a kickoff meeting for a new project, a consultant starts gathering information to be used in the project implementation plan. They ask the participants to define what project success will look like.

Which strategy is the consultant using?

Options:

A- Design Direction

B- Challenge Framing

C- Discovery

Answer:

C

Explanation:

During the discovery phase of a project, a consultant gathers information to understand the client's needs, objectives, and definitions of success. Asking participants to define what project success will look like is a key part of the discovery process, as it helps establish clear goals and expectations for the project implementation plan.

Discovery Phase in Salesforce Projects

Effective Discovery Techniques

Question 4

Question Type: **MultipleChoice**

Sales reps at Cloud Kicks (CK) often receive important customer emails they want to log as records related to Contacts in Salesforce. CK has Office 365, as well as a policy that prevents users from installing anything directly on their computers.

Which solution should a consultant recommend to meet this requirement?

Options:

A- Einstein Activity Capture

B- Salesforce Inbox

C- Lightning Console for Sales

Answer:

A

Explanation:

Einstein Activity Capture is a solution that automatically syncs emails and events between a user's email and Salesforce without requiring any software to be installed on the user's computer, making it compatible with CK's policy. It works with Office 365 and ensures that important customer emails are logged as records related to Contacts in Salesforce, providing an efficient and policy-compliant solution.

Einstein Activity Capture Overview

Set Up Einstein Activity Capture

Question 5

Question Type: **MultipleChoice**

The Cloud Kicks pipeline and forecasting reports are inaccurate because sales reps are creating opportunities after they are already closed won. Sales management wants visibility into how often the sales reps are creating these types of opportunities.

Which solution should the consultant recommend?

Options:

A- implement automation to update the opportunity to the first stage in the sales process.

B- Configure a report that displays opportunities that have an earlier dosed date than

C- Run the opportunity Pipeline line standard report to view the upcoming opportunities by stage.

Answer:

B

Explanation:

To provide visibility into how often sales reps are creating opportunities after they are already closed won, the best solution is to configure a report that displays opportunities with a closed date earlier than the created date. This report will highlight any discrepancies where opportunities are being backdated, allowing sales management to monitor and address this issue directly.

Reporting on Opportunity History

Creating Reports to Monitor Sales Activities

Question 6

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 7

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 8

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 9

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