



Free Questions for CRT-403 by dumpshq

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Question 1

Question Type: MultipleChoice

An app builder just added a lookup field to Account from the existing custom object, Box.

Which report type is automatically created?

Options:

A- Boxes with or without Accounts

B- Accounts with or without Boxes

C- Boxes with Accounts

D- Accounts with Boxes

D- Accounts with Boxes. Salesforce automatically creates a new report type that reflects the relationship from the perspective of the parent object, in this case, Accounts, showing related Box records.

This new report type enables users to create reports that list Accounts along with their associated Boxes, if any.

For further understanding of report types and relationships, Salesforce's guide on Report Types provides comprehensive information on how these are structured following modifications to object relationships.

Answer:

D, D

Explanation:

Upon adding a lookup field to Account from a custom object, Box:

Question 2

Question Type: MultipleChoice

A sales manager has noticed that reps continue to input contacts directly in their phone instead of adding them to Salesforce.

What should an app builder recommend to ensure the data makes it into Salesforce?

Options:

- A-** Enable in-app notifications every time a contact is created.
- B-** Allow Salesforce to import Contacts from mobile device Contact lists.

C- Enable offline create, edit, and delete in Salesforce for Android and iOS.

D- Allow users to relate a contact to multiple accounts.

Answer:

C

Explanation:

To ensure sales reps input contacts into Salesforce rather than their personal devices:

C . Enable offline create, edit, and delete in Salesforce for Android and iOS. This feature allows sales reps to enter contact information directly into the Salesforce Mobile App even when they are offline, which syncs back to Salesforce once connectivity is restored.

Steps to enable offline capabilities:

Navigate to Setup Mobile Administration Salesforce Mobile App Offline Settings.

Configure offline settings to allow for creating, editing, and deleting records.

Ensure that the Contact object is available for offline access.

This functionality encourages reps to use Salesforce directly by mitigating connectivity constraints.

[For implementation details, refer to Salesforce Mobile App Offline.](#)

Question 3

Question Type: MultipleChoice

What is one limitation of using schema builder when creating a field?

Options:

- A- Cannot create formula fields.
- B- Cannot see existing relationships between objects.
- C- Cannot add fields to page layouts.
- D- Cannot create lookup relationships.

Answer:

C

Explanation:

One of the limitations when using the Schema Builder for creating fields is:

C . Cannot add fields to page layouts. While Schema Builder allows for easy visualization and creation of fields and objects, it does not support placing these fields onto specific page layouts directly from the Schema Builder interface.

To place fields on page layouts, you need to:

Navigate to Setup Object Manager select your object.

Click on Page Layouts, choose the appropriate layout, and manually add the newly created fields.

This step is necessary to ensure fields are visible and properly arranged on user interfaces.

[For more details, Salesforce's Schema Builder documentation outlines its capabilities and limitations.](#)

Question 4

Question Type: MultipleChoice

A customer service representative at a call center wants to be able to collect information from customers using a series of question prompts.

What should an app builder use to accomplish this?

Options:

- A- Approval Process
- B- Flow
- C- Validation Rule
- D- Path

Answer:

B

Explanation:

For a customer service representative to collect information through a series of question prompts:

B . Flow. Salesforce Flows allow for the creation of guided interactions that can prompt users for information in a step-by-step manner.

Steps to create a flow for this purpose:

Navigate to Setup Flows.

Click on 'New Flow' and select a Screen Flow to interactively prompt users.

Design the flow with Screen elements for each question.

Add logic to process responses as necessary.

Save and activate the flow.

Embed or link the flow in a relevant location accessible to the service representative, such as on a record page or in the utility bar.

Flows provide a flexible and powerful way to interactively gather and process customer data in real time.

[For detailed guidance on creating Flows, see Salesforce's Flow Builder documentation.](#)

Question 5

Question Type: MultipleChoice

Universal Containers asked the app builder to ensure when an account type changes to 'Past-Customer' the contacts directly related to that account get an updated status of 'Re-Market'.

Which automation should the app builder use to accomplish this task?

Options:

- A- Screen flow
- B- Lightning component
- C- Validation rule
- D- Record triggered flow

Answer:

D

Explanation:

For automatically updating contact statuses when an account type changes:

D . Record triggered flow. This type of automation can monitor changes in account types and accordingly update related records, such as contacts.

Steps to implement:

Navigate to Setup Flows.

Create a new Flow and choose the record-triggered flow type.

Configure the flow to trigger when the Account record is updated to 'Past-Customer'.

Add an Update Records element to modify all related contacts, setting their status to 'Re-Market'.

Activate the flow.

This automation ensures that contact statuses are updated in real-time when their related account's type changes, maintaining data consistency and relevancy.

For more on record-triggered flows, check out [Salesforce's Record-Triggered Flows documentation](#).

Question 6

Question Type: MultipleChoice

The VP of sales at AW Computing would like a Roll-Up Summary field on the Account object to aggregate the amount of opportunities related to an Account. The app builder is unable to implement this change.

Why is the app builder unable to fulfill the request?

Options:

- A-** Currency fields are unable to be referenced in Roll-Up Summary fields.
- B-** The organization has Advanced Currency Management enabled

C- Roll-Up Summary fields are unavailable on the Account object.

D- The default currency is not an active currency in the organization,

Answer:

B

Explanation:

The inability to create a Roll-Up Summary field in this context can be attributed to:

B . The organization has Advanced Currency Management enabled. When Advanced Currency Management (ACM) is enabled, it affects how currency data is managed and aggregated, impacting the functionality of roll-up summary fields that involve currency amounts across different records.

To address this limitation, consider using custom reporting or a custom solution like a trigger or a scheduled batch class to manually calculate and update the total.

[For more information on limitations with ACM, consult Salesforce's help article on Advanced Currency Management.](#)

Question 7

Question Type: MultipleChoice

Universal Containers wants to give sales managers the ability to quickly provide sign off on an Opportunity via the Opportunity record page when a sales rep

has discounted a deal by 20% to 30%.

Which two features should be used for this requirement?

Choose 2 answers

Options:

A- Validation Rule

B- Dynamic Actions

C- Schema Builder

D- Approval Process

Answer:

B, D

Explanation:

To facilitate quick managerial sign-off on discounted opportunities:

B . Dynamic Actions: Allows the display of specific actions on the Opportunity record page based on certain conditions, like the discount percentage.

D . Approval Process: Configures a formal sign-off process for records meeting specific criteria, such as discount ranges between 20% to 30%.

Steps to set up:

Configure an approval process for opportunities where the discount is between 20% and 30%.

Use Dynamic Actions to conditionally show the approval action directly on the Opportunity record page based on the discount percentage.

This setup allows sales managers to efficiently review and approve discounted deals directly from the Opportunity record page.

[For guidance on setting up approval processes and dynamic actions, refer to Dynamic Actions in Salesforce.](#)

Question 8

Question Type: MultipleChoice

Universal Container's sales reps can modify fields on an opportunity until it is closed.

The sales operations team has access to modify the Post-Close Follow-up Date and Post-Close Follow-up Comments fields after the opportunity is closed. After the

opportunity is closed, the rest of the fields are read only.

How should these requirements be met?

Options:

- A-** Use record types with field sets and restrict editing fields using field-level security.
- B-** Use field-level security on page layouts to restrict editing fields.
- C-** Use field-level security on page layouts with record types to restrict editing fields,
- D-** Use field-level security to mark fields as read-only on the Sales profile.

Answer:

C

Explanation:

To manage field editability based on the opportunity status:

C . Use field-level security on page layouts with record types to restrict editing fields. This combination allows for different layouts and editable fields based on the status of the record (e.g., closed or open).

Steps to implement:

Create or adjust record types for open and closed opportunities.

For each record type, create a specific page layout.

On the page layout for closed opportunities, set the majority of fields to read-only using field-level security, except for the 'Post-Close Follow-up Date' and 'Post-Close Follow-up Comments' fields.

Assign the appropriate page layouts to the respective record types.

Update profiles or permission sets to use these record types and page layouts accordingly.

This setup ensures that sales reps can modify fields only when the opportunity is open, and the sales operations team can edit specific fields after closure.

[For more information on using record types and page layouts, check Salesforce's documentation on Record Types.](#)

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