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Question 1

Question Type: **MultipleChoice**

An invoice run with a target date of 6/1/20 has completed with no errors.an orderproductwith a next billing date of 6/1/20 did not generate an invoice line.which of the following ields might hold a value that would account for this?

Options:

A- Billing type

B- Next change date

C- billing account

D- Billing day of month

E- Invoice run processing status

Answer:

D

Explanation:

In Salesforce Revenue Cloud, the ''Billing Day of Month'' field can affect whether an invoice line is generated for an order product1.The system evaluates several fields to calculate an order product's next billing date1.If the order product is billed in advance, Salesforce evaluates the order's billing day of month to choose the nearest date on or before the order product's start date1.If the order product is billed in arrears, Salesforce evaluates the order's billing day of month to choose the nearest date after the order product's start date1.Therefore, if the ''Billing Day of Month'' does not match with the next billing date of the order product, it might prevent the generation of an invoice line1.Reference

Understanding Next Billing Date - Salesforce

Question 2

Question Type: MultipleChoice

A Salesforce CPQ implementation suffers from poor performance.The Revenue Cloud

Consultant has implemented 90 active price rules Supporting complex pricing

requirements.what tactics can a Revenue Cloud Consultant Consider to reduce the

number of price rules to improve performance in this area?(Choose 2 options)

Options:

A- Create a support case and request to increase the processing limits so that price rulesperform better.

B- Implement lookup price rules where applicable

C- Implement Quote Calculator Plugin where Possible to replace price rules.

D- Implement triggers and Apex that behave like price rules.

E- Replace recursive price rule logic with nested bundles.

Answer:

B, C

Explanation:

A Salesforce CPQ implementation can suffer from poor performance due to a large number of active price rules supporting complex pricing requirements. To improve performance in this area, a Revenue Cloud Consultant can consider the following tactics:

Implement lookup price rules where applicable (Option B): Lookup price rules in Salesforce CPQ allow for the mapping of data points on a quote line to data in a custom object, finding a matching record with the same values, and retrieving an associated field value from the matched record1.This can help reduce the number of price rules needed, thereby improving performance1.

Implement Quote Calculator Plugin where possible to replace price rules (Option C): The Quote Calculator Plugin in Salesforce CPQ allows for the addition of extra functionality to the quote line editor with custom JavaScript code2.This can change how calculations are performed and manage page-level security such as field visibility2.By replacing some price rules with functionalities in the Quote

Calculator Plugin, the number of price rules can be reduced, leading to improved performance2.

Salesforce CPQ Lookup Price Rules

Salesforce CPQ Quote Calculator Plugin

Question 3

Question Type: **MultipleChoice**

Universal Containers is Preparing to go live with salesforce CPQ however sales management has stated that they would recurring revenue captured on opportunity line item object to reference within existing pipeline reports.Annual revenue is currently captured in the field ARR c on the SBQQ QuoteLine c Object.Which is the most efficient solution.

Options:

A- Create ARR c on the opportunity Line item object,and create a price rule to copy thevalue from ARR c on SBQQ QuoteLine c on opportunity Product.

B- Create ARR c on the opportunity Line item object,and create a flow to copy the valuefrom ARR c on SBQQ QuoteLine C.

C- Create ARR c on the opportunity Line item object,Matching the field configurationof ARR c on SBQQ QuoteLine C.

D- Create a cross object formula field on the opportunity line item to reference ARR cdata SBQQ QuoteLine C.

Answer:

C

Question 4

Question Type: **MultipleChoice**

A Revenue Cloud user story for a Subscription-based Company Looking to replace their

legacy system states "As a pricing Manager, bulk discounts will include previously

purchased quantities for pricing calculations on the quote in order to reward loyal

customers"what should be included in the design of this solution?. (Choose 2 options)

Options:

A- Custom Action to retrieve Purchased quantities from an external source

B- Contracts,Subscriptions and Assets should be populated with historical data.

C- Use a summary variable targeting the subscription object with a Price Rule.

D- Legacy Orders and invoices should be migrated

E- Discount schedules with Cross Orders checked.

Answer:

B, E

Explanation:

To implement the user story of rewarding loyal customers with bulk discounts based on previously purchased quantities, the design of the solution should include the following components:

Contracts, Subscriptions and Assets should be populated with historical data. This is necessary to track the customer's purchase history and determine the appropriate discount tier for each product or service. Contracts, Subscriptions and Assets are the core objects of Revenue Cloud that store the information about the customer's agreements, recurring charges, and entitlements. By migrating the historical data from the legacy system to these objects, the customer can leverage the Revenue Cloud features such as renewal management, usage-based pricing, and revenue recognition.123

Discount schedules with Cross Orders checked. This is the feature that enables the bulk discounts based on previously purchased quantities. A discount schedule is a set of discount tiers that apply to a product or a product option based on the quantity or amount ordered. By checking the Cross Orders option, the discount schedule will consider the quantities from all the orders associated with the same account, contract, or subscription. This way, the customer can reward their loyal customers with lower prices for higher volumes.45

1: Revenue Management Platform & CPQ Solution - Salesforce.com US

2: Salesforce Introduces Revenue Cloud to Help Businesses Accelerate Revenue Growth Across Any Channel - Salesforce

3: Give Discounts for Long Subscriptions Unit | Salesforce Trailhead

4: Discount Schedules - Salesforce

5: Salesforce Revenue Cloud Trailmix - Trailhead

Question 5

Question Type: MultipleChoice

Which three documents help a revenue cloud consultant better understand the client's

Revenue Cloud Project requirements before speakingfor the first time in a scopingsession?

Options:

A- A sample proposal the client provides to their customers

B- Brochures that provided detail to the products and services the client offers

C- The latest release notes found at help salesforce.com>salesforce CPQ patch notes

D- An approval matrix documentation that describe the approvals needed before a quote issent to the customer

E- The clients income statements and balance sheet.

Answer:

A, B, D

Explanation:

These are three documents that can help a revenue cloud consultant gain a better understanding of the client's business model, value proposition, pricing strategy, and approval process before engaging in a scoping session.

A sample proposal the client provides to their customers: This document can help the consultant understand how the client presents their products and services to their customers, what kind of information they include, how they structure their pricing and discounts, and what terms and conditions they apply. This can help the consultant design a solution that meets the client's needs and expectations, as well as aligns with their branding and messaging.1

Brochures that provided detail to the products and services the client offers: This document can help the consultant understand the features and benefits of the client's products and services, how they differentiate themselves from their competitors, and what kind of value they deliver to their customers. This can help the consultant configure the product catalog, pricing rules, and quote templates that reflect the client's offerings and value proposition.2

An approval matrix documentation that describe the approvals needed before a quote is sent to the customer: This document can help the consultant understand the client's internal governance and compliance requirements, as well as the roles and responsibilities of the stakeholders involved in the quote-to-cash process. This can help the consultant set up the approval workflows, notifications, and permissions that ensure the accuracy and validity of the quotes and contracts.3

1: This article explains how to create a professional proposal for customers using Salesforce CPQ.

2: This article explains how to create and manage product catalogs and pricing in Salesforce Revenue Cloud.

3: This article explains how to create and manage approval processes in Salesforce Revenue Cloud.

Question 6

Question Type: **MultipleChoice**

Which three are key steps when documenting user stories?

Options:

A- Know which business process the requirement supports to categorize the user story

B- Identity the actor or personas in this user story

C- Design the solution while the business process is being defined

D- Document user acceptance test scripts for the user story.

E- Identify the acceptance criteria or result for satisfying the user story.

Answer:

A, B, E

Explanation:

User stories are short, simple descriptions of a feature or functionality from the perspective of the end user or customer. User stories are used to capture the requirements and value proposition of a product or service in an agile framework. User stories should follow some best practices to ensure clarity, consistency, and alignment with the business goals and user needs.12

Some of the key steps when documenting user stories are:

Know which business process the requirement supports to categorize the user story. This helps to prioritize and organize the user stories based on the business value and impact they deliver. It also helps to avoid duplication and inconsistency among user stories.3

Identify the actor or personas in this user story. This helps to define the user role, needs, goals, and motivations that drive the user story. It also helps to create empathy and understanding for the user and their context.4

Identify the acceptance criteria or result for satisfying the user story. This helps to specify the expected outcome, behavior, or functionality that the user story should deliver. It also helps to define the scope, quality, and testability of the user story.5

Designing the solution while the business process is being defined is not a key step when documenting user stories. This can lead to premature or biased decisions that may not address the real user problem or value proposition. User stories should focus on the what and why, not the how. The solution design should be done after the user stories are validated and prioritized, and in collaboration with the development team and other stakeholders.6

Documenting user acceptance test scripts for the user story is not a key step when documenting user stories. This can be done later, after the user stories are refined and detailed, and before the development and testing phases. User acceptance test scripts are used to verify that the user story meets the acceptance criteria and the user expectations. [7]

1: User Stories | Examples and Template | Atlassian

2: How to Write Perfect User Stories (With Templates): A Step-By-Step Guide | airfocus

3: 10 Tips for Writing Good User Stories - Roman Pichler

4: The Anatomy of a User Story | Scrum Alliance | Includes Template

5: Best Practices to Succeed with User Stories - DZone

6: UX documentation: Guide, best practices, template

Question 7

Question Type: **MultipleChoice**

Universal Containers wants to design a multi-leveled approval matrix to have more

control on sales reps applying discounts on quotes.Which three considerations should UC

Keep in mind when designing their Solution?

Options:

A- Identify backup approvers in case the primary approver is out of the office.

B- Print out the approval matrix into cards that the sales reps can carry around.

C- Give sales reps flexibility to apply any discount.

D- Define the discount threshold or limit allowed for the sales reps

E- Document the discount approval levels for each approver.

Answer:

A, D, E

Explanation:

To design a multi-leveled approval matrix for controlling discounts on quotes, Universal Containers should consider the following:

Identify backup approvers in case the primary approver is out of the office. This will ensure that the approval process is not delayed or stalled due to the unavailability of the primary approver. Backup approvers can be assigned using the Delegated Approver feature in Salesforce, which allows users to delegate their approval authority to another user for a specific period of time.1

Define the discount threshold or limit allowed for the sales reps. This will help to enforce the pricing policies and prevent excessive or unauthorized discounts. The discount threshold or limit can be defined using the Approval Thresholds feature in Salesforce CPQ, which allows setting up different approval rules based on the discount percentage, amount, or margin.2

Document the discount approval levels for each approver. This will help to clarify the roles and responsibilities of each approver and the criteria for approving or rejecting a quote. The discount approval levels can be documented using the Approval Processes feature in Salesforce, which allows creating a sequence of steps and actions that an approval request must go through.3

Approval Thresholds

Approval Processes

Delegated Approver

Question 8

Question Type: **MultipleChoice**

Universal Containers is reporting a platform governor limit issue while saving a quotewith a large number of quote line items.

What should the Revenue cloud consultantrecommend to address the issue?

Options:

A- Enable the CPQ package setting for ''quote batch size'' to a value which is less than thenumber based on the volume testing to avoid platform gov.limits

B- Enable the CPQ Package setting for ''Large Quote Experience''

C- Enable the CPQ package setting for ''Large Quote Threshold'' to a value which is lessthan the number based on the volume testing to avoid platform gov.limits

D- Enable the CPQ package setting for ''Large Quote Threshold'' to a value which is lessthan the number of lines which triggered the error during testing.

Answer:

D

Explanation:

The Large Quote Experience is a feature of Salesforce Revenue Cloud that allows businesses to handle quotes with a large number of quote line items more efficiently and avoid platform governor limit issues. The Large Quote Experience optimizes the performance of the Quote Line Editor and the Quote Calculator by using asynchronous processing, caching, and pagination. By enabling the Large Quote

Experience, businesses can improve the user experience and reduce the risk of hitting CPU time, heap size, or SOQL query limits when saving or calculating large quotes. The Large Quote Experience can be enabled by setting the CPQ Package setting for ''Large Quote Experience'' to True. The Large Quote Experience also requires the CPQ Package setting for ''Quote Batch Size'' to be set to a value between 50 and 200, which determines the number of quote line items processed in each batch. The optimal value for this setting depends on the complexity and configuration of the quote line items

https://developer.salesforce.com/docs/atlas.en-us.apexcode.meta/apexcode/apex_limits_intro.htm

Question 9

Question Type: **MultipleChoice**

What Planning Strategies Should be taken to Make User AcceptanceTesting(UAT) efficient?(Choose 3 options)

Options:

A- Execute all tests on behalf of the customer

B- Define and agree on acceptance criteria with customer

C- Issue change orders for all incidents that arise during testing

D- Train UAT testers on the new functionality

E- Finalize test plans before the build Phase completes

Answer:

B, D, E

Explanation:

User acceptance testing (UAT) is a process of verifying that a software solution meets the business requirements and expectations of the end users. UAT is usually performed in a test environment by a representative group of users before the software is deployed to production. UAT is essential for ensuring the quality, usability, and functionality of the software, as well as the satisfaction and adoption of the users. To make UAT efficient, some of the planning strategies that should be taken are:

Define and agree on acceptance criteria with customer: Acceptance criteria are the specific and measurable conditions that the software must meet to be accepted by the customer. They are derived from the business requirements and user stories, and they serve as the basis for designing and executing the UAT test cases. Defining and agreeing on the acceptance criteria with the customer before the UAT phase ensures that both parties have a clear and common understanding of what constitutes a successful outcome, and reduces the risk of ambiguity, confusion, or disagreement during the testing process.12

Train UAT testers on the new functionality: UAT testers are the end users who will evaluate the software and provide feedback on its performance, usability, and suitability for their needs. They should be familiar with the business processes and workflows that the software supports, as well as the new features and enhancements that are being tested. Training the UAT testers on the new functionality before the UAT phase helps them to prepare for the testing activities, understand the expected behavior and results of the software, and identify and report any issues or defects that they encounter. Training also increases the confidence and competence of the UAT testers, and improves the quality and efficiency of the testing process.34

Finalize test plans before the build phase completes: Test plans are the documents that outline the scope, objectives, approach, resources, schedule, and deliverables of the UAT phase. They specify the test cases, scenarios, data, tools, and methods that will be used to verify the acceptance criteria of the software. Finalizing the test plans before the build phase completes ensures that the UAT phase is well-planned, organized, and ready to start as soon as the software is delivered to the test environment. It also allows for early detection and resolution of any gaps, risks, or dependencies that may affect the testing process. [5] [6]

Learn About User Acceptance Testing

User Acceptance Testing Strategies for Large Data Volume Scenarios

5x Salesforce Professional Revenue Cloud Tests 2023

A Guide to Salesforce User Testing (UAT)

Question 10

Question Type: **MultipleChoice**

Which topic of discussion comes first in a salesforce CPQ Scoping Session?

Options:

A- Business Process Mapping

B- Quote Document and e-signature

C- Order Management

D- Products and Bundles

Answer:

A

Explanation:

In a Salesforce CPQ Scoping Session, the first topic of discussion is typically Business Process Mapping. This involves understanding the current business processes and identifying areas where Salesforce CPQ can provide improvements. It's an essential step in the scoping process as it helps to define the project's scope and identify potential challenges early on. The other topics like Quote Document and e-signature, Order Management, and Products and Bundles are also important but they usually come after the business processes have been mapped and understood.

Reference

Get Started with Salesforce CPQ Unit | Salesforce Trailhead

CPQ Scoping Questionaire? : r/salesforce - Reddit

How To: Salesforce CPQ: Build a Bundle

Question 11

Question Type: **MultipleChoice**

What are three fundamental principles when scoping a Revenue CloudProject?

Options:

A- Alignment with customer on cpq and billing Terminology

B- Add new technology to the existing Process

C- Lead with Business Requirements and Process

D- Think Transformation before Customization

E- Interview Customer first before Knowledge Sharing with the sales team.

Answer:

A, C, D

Explanation:

C . Lead with Business Requirements and Process123: This principle helps you understand the specific needs and objectives of the project, as well as the current and desired state of the business processes. It also helps you align the project scope with the business value and outcomes.

D . Think Transformation before Customization3: This principle helps you leverage the best practices and capabilities of Revenue Cloud, and avoid unnecessary or complex customizations that may increase costs, risks, and maintenance efforts. It also helps you embrace change and innovation, and optimize your revenue operations.

A . Alignment with customer on CPQ and Billing Terminology3: This principle helps you establish a common language and understanding of the key concepts and features of Revenue Cloud, such as CPQ (Configure-Price-Quote), Billing, Subscription Management, etc. It also helps you avoid