

Certified Sales Cloud Consultant

1. The sales management team at Northern Trail Outfitters (NTO) wants to analyze how the sales funnel is changing throughout the month. NTO wants to store the details of open opportunities weekly, and forecasts and closes business monthly.

What should be recommended?

A. Schedule a custom forecast report to run weekly and store the results in a custom report folder.

B. Create a reporting snapshot to run weekly and store the results in a custom object.

C. Create a reporting snapshot to run daily and store the results in a custom object.

D. Schedule a custom forecast report to run daily and store the results in a custom report folder.

Answer(s): B

2. Universal Containers wants to capture business sector information on a lead and display the information on the account and contact once the lead has been converted. How can these requirements be met?

A. Create a custom field on the Lead and Account objects and configure mapping of these two fields for conversion. Create a custom formula field on the Account object to pull the value from the Contact object.

B. Create a custom field on the Lead and Account objects. Create a custom formula field on the Contact object to pull the value from the Account object.

C. Create a custom field on the Lead, Account, and Contact objects and configure mapping of these two fields for conversion. Use a trigger to update the Contact field with the Account value.

D. Create a custom field on the Lead and Account objects and configure mapping of these two fields for conversion. Create a custom formula field on the Contact object to pull the value from the Account object.

Answer(s): D

3. Universal Containers is preparing for the launch of its new Sales Cloud implementation to a global user base. With previous sales automation applications, the company had slow adoption of the new solution.

Which three Sales Cloud deployment factors should be considered to help ensure adoption? (Choose three.)

A. Maintenance release schedule

B. Management communications

C. Sales rep quota targets

D. Type of training delivered

E. Training in local language

Answer(s): B D E

4. Sales management at Universal Containers wants product managers to become more involved with sales deals that are being delayed in the negotiation stage of the sales process. Product managers need to understand the details of specific sales deals, and address product capability and roadmap questions with customers.

Which two solutions should a consultant recommend to help product managers engage in sales deals? (Choose two.)

A. Use Process Builder to create a chatter post.

B. Use an assignment rule to notify product managers when opportunities are updated.

C. Add the opportunity team, product managers, and customers to libraries containing files relevant to sales deals.

D. Create a Chatter group to share product information with the sales team, product managers, and customers.

Answer(s): A D

5. Universal Containers wants to implement a website for a new product launch. The site should be publicly available, allow visitors to submit requests for information, and be managed by the non-technical marketing team.

Which solution should the consultant recommend?

A. Customer Community

B. Lightning Platform

C. Lightning Components

D. Salesforce Mobile Sites

Answer(s): A

6. The sales management team of Universal Containers has noticed that opportunities are taking longer to close.

Historically, it has taken 30 days for a new opportunity to be moved to closed/won. Recently, this time period has increased to 45 days.

Which two reporting tools can the sales management team leverage to help determine the cause? (Choose two.)

A. Dashboard of month-over-month trend of lead conversions

B. Report on campaign return on investment (ROI)

C. Report on the discount approval time for quotes

D. Dashboard of opportunity stage duration

Answer(s): C D

7. A consultant is recommending Salesforce Console for Sales to Northern Trail Outfitters to improve sales productivity in inside sales.

Which two use cases support this recommendation? (Choose two.)

A. Need to chat with customers in real time with Chatter

B. Need to prioritize search results for contacts and opportunities

C. Need to view the caller ID on screen and quickly make calls with one click

D. Need to add notes quickly while talking to the client

Answer(s): C D

8. Northern Trail Outfitters has Advanced Currency Management enabled and needs reports that span time periods when the exchange rate was different.

What is the converted amount based on in this scenario?

A. On exchange rates that use the oldest entry

B. On the exchange rates entered in the opportunity

C. On exchange rates that use the most current entry

D. On the historical exchange rate associated with the close date

Answer(s): D

9. Northern Trail Outfitters uses a third-party application for credit ratings. An external web-based credit application has to be launched from a customer's account record in Salesforce. The application uses a credit ID on the account object.

What should be created to meet this requirement?

A. A workflow rule to launch the product fulfillment application and pass the credit ID

B. A custom button that calls an Apex trigger to launch the credit application and pass the credit ID

C. A custom credit ID field as an external ID on the account to launch the credit application and pass the credit ID

D. A formula field that uses the hyperlink function to launch the credit application and pass the credit ID

Answer(s): D

10. Universal Containers is planning to implement Salesforce Sales Cloud to support its professional services division. The Universal Containers sales team wants to easily see customer purchasing activity on account, contact, and contract detail pages.
What should a consultant recommend to meet this requirement?

A. Enable Salesforce Console for Sales to see customer purchasing activity.

B. Create a custom object related to the account, contact, and contract objects.

C. Enable the Orders object in Salesforce to track customer purchases.

D. Create a global publisher action to view all customer purchasing activity.

Answer(s): C

11. Management at Northern Trail Outfitters wants to see forecast numbers by all sales representatives and by multiple product groups.
Which two actions should a consultant recommend to meet these requirements? (Choose two.)

A. Build a custom forecast report showing product groups.

B. Implement Collaborative Forecasting with quota attainment.

C. Build a forecast list view by product family group.

D. Implement Collaborative Forecasting with product family.

Answer(s): B D

12. A consultant needs to migrate data in Sales Cloud and is considering using Data Loader.
What are two capabilities of this migration tool? (Choose two.)

A. Extract organization and configuration data

B. Prevent importing duplicate records

C. Run one-time or scheduled data loads

D. Export field history data

Answer(s): C D

13. Northern Trail Outfitters gains sales leads at its annual trade show. Duplicate leads are generated when they are imported and already exist in the system.

What should be done to address the issue with duplicate leads?

A. Upload the leads to Data.com to remove the duplicates and select the option to have them automatically imported.

B. Upload the leads and click the "Find Duplicates" button for each of the leads to identify potential duplicate lead records.

C. Upload the leads using Data Loader and enable the "Find Duplicates" setting to prevent duplicate records.

D. Upload the leads using the Data Import Wizard and select the appropriate field to match duplicates against existing records.

Answer(s): D

14. Universal Containers wants to implement a sales methodology that focuses on identifying customer's challenges and addressing them with its offerings.

Which sales methodology is described above?

A. Direct selling

B. Solution selling

C. Target account selling

D. Relationship selling

Answer(s): B

15. What should a consultant recommend to show a dashboard with forecast by product family with quotas?

A. Build a joined report with closed opportunities, forecasting items, and quotas.

B. Create an analytic snapshot to capture the opportunity forecast.

C. Customize quotas with product report, and add necessary fields.

D. Build a custom report type with forecasting quotas and forecasting items.

Answer(s): B

16. Universal Containers supports two lines of business: shipping and freight. The sales cycle for freight deals is more complex and involves more stages than the shipping sales cycle. Which solution should a consultant recommend to meet these business requirements?

A. Create different record types and sales processes for each line of business, and use workflow field updates to assign stages.

B. Create different record types and sales processes for each line of business, and assign different stages to each page layout.

C. Create different record types and sales processes for each line of business, and assign different page layouts to each record type.

D. Create different record types and sales processes for each line of business, and assign different sales processes to each page layout.

Answer(s): C

17. Sales representatives at Northern Trail Outfitters are creating opportunities after they are closed/won. Sales management is concerned that pipeline and forecasting reports are inaccurate because of this.

Which two solutions should resolve this issue? (Choose two.)

A. Create a report that displays opportunities that have a closed date less than or equal to the created date.

- B. Create a workflow rule that automatically updates the opportunity to the first stage in the sales process.
- C. Use a workflow rule to email sales management when the opportunity is created in the closed/won stage.
- D. Run the opportunity pipeline standard report to view the upcoming opportunities by stage.

Answer(s): A C

18. Sales directors at Northern Trail Outfitters (NTO) cannot see or update their teams' forecasts. Sales representatives are constantly asked to provide the directors with their updated forecast information.

Which two methods should NTO use to correct how forecasts are managed? (Choose two.)

- A. Create forecast Chatter groups where sales representatives can post and share their forecasts.
- B. Configure weekly customized forecast reports and dashboards to be emailed to sales management.
- C. Enable override forecast permission in the Manager's profile.
- D. Create a forecast hierarchy and assign managers to the forecast manager role.

Answer(s): C D

19. Northern Trail Outfitters is migrating from its legacy campaign and email management system to Salesforce and wants to ensure that its email templates are retained.

What should be recommended for a successful migration?

A. Create an email template change set or use the Lightning Platform.

B. Manually recreate the email and mail merge templates in Salesforce.

C. Enable Email to Salesforce before sending email templates to Salesforce.

D. Enable Email-to-Case and use the Import Wizard.

Answer(s): B

20. Universal Containers has automated the process of creating new account records in Salesforce. All account records created through this process are owned by a generic user. There are now two million account records that have been created in this manner. Universal Containers is now seeing performance issues when it makes any changes to account sharing rules. What can Universal Containers do to address the issue without changing its integration?

A. Ensure that the generic user has NOT been assigned to a role.

B. Ensure that the generic user has the Modify All Data permission.

C. Contact Salesforce support to add an index to the account object

D. Set the organization-wide defaults for accounts to public read/write.

Answer(s): A
