Free Questions for CRT-251

Shared by Barry on 22-07-2024

For More Free Questions and Preparation Resources

Check the Links on Last Page

Question 1

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 automatically syncs emails and events between Salesforce and Office 365 without requiring any installation on users' devices, making it an ideal solution for Cloud Kicks, given their policy restrictions. By using Einstein Activity Capture, sales reps can have customer emails logged as records related to Contacts in Salesforce seamlessly. This tool works with cloud-based services like Office 365, syncing activities in real-time and storing them within Salesforce, thus keeping records updated without manual intervention.

Salesforce Inbox, while offering similar capabilities, requires an add-in installation that might not align with CK's IT policy. Therefore, Einstein Activity Capture is the recommended solution for this scenario as it meets CK's requirements for automatic logging without violating any software installation policies.

For more information on Einstein Activity Capture, you can refer to the Salesforce documentation: Einstein Activity Capture Overview.

Question 2

Question Type: MultipleChoice

The consultant at Cloud Kicks has successfully implemented Einstein Lead Scoring. The VP of sales wants to see the effectiveness of this new functionality.

What should the consultant do to fulfill this request?

Options:

A- Create a custom report type for Sales Cloud Einstein records.
B- Add the Einstein prediction column to the forecast list view.
C- Add a standard dashboard for Sales Cloud Einstein.

Answer:

C

Explanation:

To demonstrate the effectiveness of Einstein Lead Scoring, using the standard dashboard for Sales Cloud Einstein is ideal. Salesforce provides pre-configured Einstein dashboards that visualize the impact of AI-driven insights, including lead scoring metrics. These dashboards present data such as lead conversion likelihood and lead score distributions, allowing the VP of Sales to monitor how well the leads are being scored and prioritized by Einstein. This dashboard provides real-time insights without requiring custom report types, making it a straightforward solution for tracking the effectiveness of this functionality within Sales Cloud

Question 3

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 year over year sales by Account report.
B- Create an average stage duration by Opportunity report.

C- Create a Historical Trending report.

Answer:

C

Explanation:

Historical Trending reports in Salesforce allow users to analyze changes in key data points over time, making them an excellent tool for monitoring and understanding churn. By using a Historical Trending report, Cloud Kicks can track fluctuations in opportunity stages, account statuses, and other relevant metrics. This enables the VP of sales to gauge the effectiveness of marketing efforts, identify patterns, and take proactive measures to reduce churn.

A year-over-year sales report and an average stage duration report provide valuable insights, but they do not offer the same level of detailed, time-based analysis that a Historical Trending report can offer for tracking churn.

Salesforce Documentation Reference:

Analyze Historical Trends in Salesforce

Historical Trending Overview

Question 4

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

Answer:

B

Explanation:

Creating a Global Action specifically for lead conversion enables sales reps to convert leads directly from the Salesforce mobile app. This approach provides a seamless experience that leverages native Salesforce functionality, without the need for additional installations or configurations. By setting up a Global Action, the consultant ensures that lead conversion is accessible on the go, which is ideal for Cloud Kicks' traveling sales team.

While enabling conversions in Lead Conversion settings provides configuration options, it does not by itself create mobile access. AppExchange solutions are useful but often introduce additional overhead and are unnecessary when native Salesforce functionality meets the requirement.

Salesforce Documentation Reference:

Salesforce Mobile App Global Actions

Lead Conversion on Mobile

Question 5

Question Type: MultipleChoice

Cloud Kicks sales reps want to see all of the details on their current opportunities with a minimal amount of navigation or clicks to cycle through them.

Which functionality should the consultant recommend?

Options:

A- Develop a new Sales Console app including opportunities.
B- Select the Split View option from the My Opportunities list view.
C- Create a dashboard with reports on My Opportunities.

Answer:

B

Explanation:

To allow sales reps to view all details of their current opportunities with minimal navigation, the consultant should recommend using the Split View option in Salesforce.

Key Points:

Split View Feature: Split View enables users to see a list of records alongside the details of a selected record on the same screen. This allows for quick navigation between records without excessive clicking.

Efficiency in Navigation: Sales reps can click through the list of opportunities on the left pane, and the details of each selected opportunity will display on the right pane. This reduces the need to open each record in a new tab or window.

Minimal Clicks: With Split View, reps can cycle through their opportunities seamlessly, enhancing productivity and saving time.

Salesforce Sales Cloud Reference:

Using Split View: Salesforce Help - Work with List Views Using Split View

Benefits of Split View: Split View is designed to help users process lists of records more efficiently by reducing navigation steps and keeping context while reviewing multiple records.

By selecting the Split View option from the My Opportunities list view, sales reps at Cloud Kicks can efficiently access all the details of their current opportunities with minimal navigation or clicks.

Question 6

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 most efficient way to track a single contact across multiple accounts, such as an executive associated with both a business and a nonprofit, is by enabling the Contact to Multiple Accounts feature. This functionality allows a contact to have a primary relationship with one account while also maintaining indirect relationships with other accounts. For example, the contact could be directly related to their primary business account while also being connected to a nonprofit account as an indirect relationship. This avoids the need for duplicate records and ensures that interactions across all related accounts are tracked within a single contact record

Question 7

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- Create a custom report on the User object.
B- Review the login history on the user record.
C- Create a User report and filter by Login Subtype.

Answer:

C

Explanation:

To efficiently analyze login patterns of Cloud Kicks' sales agents, consultants can create a User report and filter by Login Subtype. This filter provides details on the specific method of login, such as mobile or browser, enabling a quick and precise understanding of how agents are accessing Salesforce. This approach allows for easy tracking and analysis without the need to review individual user records manually, streamlining the assessment of login behaviors across a large user base like CK's 500 sales agents.


20%
DISCOUNT