

Salesforce

CRT-251

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Question: 1

Cloud Kicks just deployed Sales Cloud globally and wants to make sure that all of its users are using Salesforce. How should the consultant determine if all regions are using Salesforce?

- A. Assign all users to a region, build a report using user login history, and filter on region.
- B. Create an Opportunity report per region, filtering by User.
- C. Ask each regional sales manager to run the standard User Adoption report.
- D. Install Salesforce Adoption Dashboards from the AppExchange and use the region chart.

Answer: D

Explanation:

The Salesforce Adoption Dashboards provide visibility into how users are adopting and interacting with Salesforce. The region chart shows the number of logins, page views, and other metrics by region. This can help the consultant determine if all regions are using Salesforce effectively.

Question: 2

The Cloud Kicks (CK) IT team wants to enable Person Accounts in its Salesforce org. Which three prerequisites must be met before the consultant can enable Person Accounts? Choose 3 answers

- A. User Profiles with Read access to Accounts must also have Read access to Contacts.
- B. At least one Record Type should be created for Accounts.
- C. The CK customer portal must be disabled to allow Person Account self-registration in the future.
- D. The organization-wide default sharing is set so either Contact is Controlled by Parent or both Account and Contact are Private.
- E. The organization-wide default for both Accounts and Contacts should be set to Public Read/Write.

Answer: A, B, D

Explanation:

These are the prerequisites for enabling Person Accounts in a Salesforce org, as stated in the documentation. Person Accounts are a special type of account that combines account and contact data into a single record. They are useful for B2C scenarios where individuals are customers rather than organizations.

Question: 3

Access to opportunities at Cloud Kicks should be restricted. Sales users should only have access to two categories of opportunities: opportunities they own, and opportunities that are tied to accounts they own.

What are two actions a consultant can take to meet the requirement?

Choose 2 answers

- A. Set Territory Management to grant Read access to opportunities owned by others.
- B. Set opportunity access on the role to view all opportunities associated with their accounts.
- C. Set organization-wide defaults for opportunities to Private.
- D. Set organization-wide defaults for opportunities to Public Read-Only.

Answer: B, C

Explanation:

These are the actions that can meet the requirement of restricting access to opportunities based on ownership and account association. Setting opportunity access on the role allows users to see opportunities owned by users below them in the role hierarchy, as well as opportunities associated with accounts they can access. Setting organization-wide defaults for opportunities to Private means that users can only access opportunities they own, unless they are granted access by other means, such as sharing rules or manual sharing.

Question: 4

Sales managers at Cloud Kicks have noticed that information in some opportunity reports is incomplete. A consultant has performed an analysis and determined that opportunity stage reports often lack key information that sales managers expect at each stage because sales reps have yet to enter the data. What should the consultant recommend so opportunity stage reports always contain the data managers expect?

- A. Create an Auto launched flow to determine if required fields are missing.
- B. Mark the fields as required on the Page layout.
- C. Customize Path and create validation rules dependent on stages.
- D. Configure Path by checking the Key Field Required checkbox.

Answer: D

Explanation:

Path is a feature that helps users visualize and update key fields for each stage of a process, such as an opportunity sales process. By checking the Key Field Required checkbox, the consultant can make sure that users enter the data that managers expect at each stage before moving to the next stage. This can improve data quality and reporting accuracy.

Question: 5

An executive at Cloud Kicks (CK) has asked its admin to create a diagram to show the high-level process areas within the business. CK plans to use the diagram to show the context of a new area of the business within the overall business. What should the admin create to meet this requirement?

- A. Suppliers, Imports, Processes, Outputs, Customers (SIPOC) Diagram
- B. Strengths, Weaknesses, Opportunities, Threats (SWOT) Diagram
- C. Value Stream Map
- D. Capability Model

Answer: A

Explanation:

A SIPOC diagram is a tool that can be used to show the high-level process areas within a business, as well as the inputs and outputs of each process, and the suppliers and customers involved. It can help provide an overview of how a business operates and how different processes relate to each other. A SWOT diagram is used to analyze the strengths, weaknesses, opportunities, and threats of a business or a project. A value stream map is used to show the flow of value from customer demand to product delivery, and identify waste and improvement opportunities along the way. A capability model is used to describe the capabilities of a business or an organization, and how they support its goals and objectives

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