Salesforce

SALES-CLOUD-CONSULTANT Exam

Salesforce Certified Sales Cloud Consultant

Questions & Answers
Demo

Version: 31.0

Question: 1

The admin at Cloud Kicks recently implemented Sales Cloud and needs to understand the adoption of Lightning Sales Console. What should a consultant recommend to analyze adoption?

A. Run the Salesforce Optimizer.
B. Open the Lightning Usage App.
C. Create a custom report.

Answer: B

Explanation:
The Lightning Usage App in Salesforce provides detailed insights into how users are engaging with the Lightning Experience, including specific apps like the Lightning Sales Console. It includes metrics on login frequency, page views, and device usage, which can help admins and consultants analyze user adoption and engagement effectively.
According to Salesforce documentation, the Lightning Usage App is the recommended tool for understanding how end users are interacting with Lightning Experience and other Salesforce apps. This app presents adoption data in a user-friendly interface, helping to identify trends, such as which users are frequently logging in, and which users may need additional support or training.
While tools like Salesforce Optimizer can provide insights into overall system health and recommendations for improvements, it is not specifically tailored for tracking usage metrics. Similarly, a custom report could be created, but it would require more effort and customization to replicate the comprehensive adoption data that the Lightning Usage App provides out of the box.
Salesforce Documentation Reference:
Lightning Usage App Overview
Salesforce Optimizer

Question: 2

Cloud Kicks recently purchased Salesforce, and the leadership team is excited about being able to forecast more accurately. Sales managers say that making updates to forecasted amounts during the pipeline meetings is time consuming, and it is difficult to review all of the committed opportunities within the meeting time.
What should the consultant recommend to help make meetings more efficient while making real-time forecast updates?

A. Use in-line editing to update the forecast amount for records.
B. Modify multiple opportunities at one time in the Forecast page.
C. Tell reps to use the list view to move opportunities between stages.

Answer: B

Explanation:
The Forecasts page in Salesforce allows sales managers and reps to view and manage forecast data in real-time. By using the "Forecasts" page, managers can efficiently modify multiple opportunities at once without needing to navigate between individual records. This capability is particularly useful during pipeline meetings as it enables real-time updates to forecasted amounts, streamlining the process and making meetings more efficient.

Salesforce's Forecasts functionality includes the ability to quickly adjust forecast amounts, manage opportunity splits, and commit forecast figures, all within the same interface. This is ideal for pipeline meetings where sales managers need to make quick adjustments based on real-time discussions.

While in-line editing can be helpful, it’s limited to updating individual records rather than making bulk changes. Using list views for moving opportunities between stages might help reps manage their pipeline, but it doesn’t offer the direct forecasting adjustments required to streamline forecast meetings.

Salesforce Documentation Reference:

Collaborative Forecasts Overview
Forecasts Page Features

Question: 3

Cloud Kicks wants to enable Person Accounts.
What does the consultant need to do before enabling Person Accounts?

A. Disable access to Experience Cloud sites during the cutover.
B. Set default sharing of Account to Public Read/Write.
C. Create at least one Account record type.

Answer: C

Explanation:
Before enabling Person Accounts, Salesforce requires that at least one Account Record Type is created. This is because Person Accounts function as a hybrid of both Account and Contact objects, with specific configurations required to distinguish between business and person accounts. Without setting up a

record type, Person Accounts cannot be enabled.
Salesforce documentation states that enabling Person Accounts will impact data models and certain configurations within the system. Therefore, it's crucial to review these prerequisites carefully. Disabling access to Experience Cloud sites and modifying account sharing settings are not prerequisites specifically tied to enabling Person Accounts.
Salesforce Documentation Reference:
[Enable Person Accounts]
[Person Accounts Overview]

Question: 4

A consultant is meeting with a new client to design a rollout strategy for its Sales Cloud implementation.
What should the consultant do during the planning stage to ensure a successful implementation?

A. Identify which Salesforce features and functions to use.
B. Design a prototype of the suggested solution.
C. Define goals, metrics, project schedule, and sales processes.

Answer: C

Explanation:
During the planning stage of a Sales Cloud implementation, defining goals, metrics, project schedules, and sales processes is critical for a successful rollout. This foundational step ensures that the implementation aligns with the client's business objectives and provides clear criteria for measuring success. Salesforce recommends that implementation planning includes establishing a timeline, setting achievable goals, and documenting existing and desired sales processes. These elements form the basis for effective project management and help in aligning the solution with the client's business needs.
Identifying Salesforce features and designing a prototype are valuable steps, but they typically occur after establishing clear goals and requirements. Proper planning sets the stage for these subsequent tasks.
Salesforce Documentation Reference:
[Salesforce Implementation Best Practices]
[Sales Cloud Planning Guide]

Question: 5

Each product engineer at Cloud Kicks supports a specific product line. There are five product lines. While sales reps sell all of the company's product lines, sales management wants the appropriate product engineer to be able to automatically view any new Opportunity for their particular product line with Read-Only rights.
What should the consultant do to meet the requirement?

A. Enable Default Account Teams for each product line.
B. Enable Default Opportunity Teams for the Opportunity.
C. Create criteria-based opportunity sharing rules for each product line.

Answer: C

Explanation:
Criteria-based sharing rules allow for automatic sharing of records based on specific criteria, such as product line in this case. By setting up opportunity sharing rules based on the product line, each product engineer can be granted Read-Only access to opportunities that match their assigned product line, ensuring they have visibility into relevant opportunities without manual updates or intervention.
Default Account Teams and Default Opportunity Teams are used to automatically assign predefined teams to records but do not inherently allow for automated sharing based on specific criteria like product lines. These options would also require manual updates to ensure that the correct engineers are assigned, which is less efficient than using criteria-based sharing.
Salesforce Documentation Reference:
Set Up Opportunity Sharing Rules
Opportunity Sharing and Criteria-Based Sharing Rules