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問題 #146

The consultant at Universal Containers recently enabled forecasts. A sales manager is concerned that all open Opportunities appear in the Pipeline forecast category. Opportunities in Perception Analysis and Proposal/Price Quote stages should appear in the Best Case category. Opportunities in the Negotiation/Review stage should appear in the Commit category. How should a consultant ensure Opportunities appear in the correct forecast categories?

- A. Map Opportunity stages to the appropriate forecast categories.
- B. Edit the probability percentage on Opportunity stage picklist values.
- C. Update the Opportunity stage picklist value labels to match the category to which they should be assigned.
- D. Create a field update with Process Builder to update the forecast category based on the Opportunity stage.

答案: A

問題 #147

The Cloud Kicks sales team can create leads for both business and individual customers. Person Accounts have been enabled in its Salesforce org.

How can the Consultant ensure that Leads are converted into either a business Account or a person Account where appropriate?

- A. Ensure the Person Account checkbox on the Lead is checked prior to conversion.
- B. Ensure the Company field is populated with "Person" to ensure it is converted into a person Account.
- C. Ensure that there are separate record types for business Account Leads and person Account Leads.
- D. Ensure the Company field is left blank to ensure it is converted into a person Account.

答案: D

問題 #148

After Cloud Kicks implemented Sales Cloud Einstein, a consultant realizes they are unable to activate all of the features. Which step should the consultant take to troubleshoot the issue?

- A. Confirm users have the feature license assigned.
- B. Check the Sales Insights Integration User profile configuration.
- C. Reconfigure the Einstein Lead Scoring app.

答案: A

問題 #149

Northern Trail Outfitters (NTO) wishes to track relationships between its customers. For example, some customers are suppliers for other customers. What should a consultant recommend to track multiple customer relations?

- A. Add the related company to the first company's custom supplier lookup field as a value.
- B. Add the related company to the first company's partner related list, with supplier as a value.
- C. Add the related company to the first company's account team, with supplier as the role.
- D. Add the related company to the first company's contact roles related list, with supplier as a value.

答案: B

問題 #150

Cloud Kicks is migrating from its current CRM application to Salesforce in phases across various regions. The current CRM application manages customer and pipeline information that resides in a legacy back-end application which needs to be migrated to Salesforce.

Which approach should the consultant use for the source data migration?

- A. Migrate all Accounts, then Contacts, and then Opportunities from the legacy back-end application.
- B. Migrate all Contacts, then Accounts, and then Opportunities from the current CRM application.
- C. Migrate all Opportunities, and then associate Accounts and Contacts from the current CRM application.
- D. Migrate all Contacts, then Opportunities, and then Accounts from the legacy back-end application.

答案：A

解題說明：

Explanation

This is the approach that the consultant should use for the source data migration. Accounts, Contacts, and Opportunities are related objects in Salesforce, and they have dependencies based on their lookup or master-detail relationships. Accounts are parent objects of Contacts and Opportunities, so they should be migrated first. Contacts are child objects of Accounts and parent objects of Opportunity Contact Roles, so they should be migrated second. Opportunities are child objects of Accounts and parent objects of Opportunity Products and Opportunity Splits, so they should be migrated last. Verified References: [Data Migration Best Practices]

問題 #151

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