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## Salesforce Consumer Goods Cloud: Trade Promotion Management Accredited Professional Sample Questions (Q21-Q26):

### NEW QUESTION # 21

The key account managers (KAMs) at Universal Containers use, in their promotion planning process, the promotion scenario planning to achieve the best setup for the promotion.

How should a consultant configure the Adjustment key performance indicators (KPIs) that the KAMs want to use? 3

- A. Add Adjustment KPI 1, Adjustment KPI 2, and Adjustment KPI 3 as Adjustment subset to the KPI set, which is assigned to the promotion template.
- B. Assign Adjustment KPI 1, Adjustment KPI 2, and Adjustment KPI 3 as Adjustment KPIs on the Details page of the promotion template.
- C. Add Adjustment KPI 1, Adjustment KPI 2, and Adjustment KPI 3 as PromotionScenarios subset to the KPI set, which is assigned to the promotion template. 4

**Answer: C**

Explanation:

Scenario Planning in TPM allows Key Account Managers to create "What-If" versions of a promotion (e.g., "What if I increase the discount to 15%?") without affecting the live plan. To facilitate this, the user interface needs to know specifically which KPIs are relevant for these experimental adjustments.

In the TPM configuration, KPI Subsets are used to group KPIs for specific UI contexts (e.g., the Volume Card, the Spend Card).

For Scenario Planning, there is a specialized subset purpose, often referenced as the PromotionScenarios subset (or similarly named configuration hook depending on the specific release version, but conceptually the "Scenario" subset).

By adding the "Adjustment KPIs" (the specific metrics where users input their simulation data, like Simulated Lift %) to this specific subset in the KPI Set, the consultant ensures that when a KAM enters "Scenario Mode," these specific fields appear and are editable. This segregates the scenario inputs from the standard operational data, allowing the calculation engine to compute the "Scenario Result" separately from the "Active Plan Result" for comparison.

### NEW QUESTION # 22

Which setting does a consultant need to activate to ensure that every time a claim is set to submitted for approval, an automated process checks if at least one fund is linked to the claim?

- A. The Requires Funds setting on the approval process
- B. The Enable Tactic Auto Fund Assignment on the sales org
- C. The Requires Funds setting on the claim template

**Answer: C**

Explanation:

Claims Management involves validating that a deduction or invoice is valid before paying it. A critical validation rule is ensuring that the money is coming from somewhere—i.e., a Fund.

This validation logic is controlled by the Claim Template. The Claim Template acts as the blueprint for the claim document. It contains a specific checkbox or setting called "Requires Funds" (Option C).

\* When this is enabled, the system enforces a hard validation: a user cannot change the status to "Submitted" (or advance the workflow) unless a Fund record is associated with the Claim.

\* Option A ("Auto Fund Assignment") is an automation feature to find a fund, not a validation rule to check for one.

\* Option B is incorrect because Approval Processes trigger after submission logic; the validation typically happens on the record state transition controlled by the template.

### NEW QUESTION # 23

Northern Trail Outfitters wants to send email to approvers, when the key account manager (KAM) is not able to approve

promotions due to a threshold limitation of plan spend being more than US\$50,000.  
How should a consultant configure this scenario, when promotion plan spend is more than \$50,000?

- A. Use Validation action to check threshold and email.
- **B. Set action as Email in workflow state transition.**
- C. Use business object application programming interface (API) to send email to approver.

**Answer: B**

Explanation:

This requirement describes a conditional approval workflow. In Consumer Goods Cloud TPM, the lifecycle of a promotion (Draft -> Submitted -> Approved) is governed by the Workflow engine (State Machine).

When a KAM attempts to approve a promotion that exceeds a spending limit (e.g., >\$50k), the system must prevent immediate approval and instead route it for review. This is handled by a State Transition.

\* Transition Logic: You define a transition from "Draft" to "Submitted for Approval" (or a specific review status) that triggers only when the condition Plan Spend > 50,000 is met.

\* Workflow Action: Attached to this specific transition is an Action. In this case, the action is to "Send Email." Therefore, Option B is the correct configuration. You configure the Workflow State Transition to detect the threshold and automatically trigger the Email Action to the approver. Option A (Validation Action) is typically used to block an action entirely (e.g., "Error: You cannot save this promotion"), which wouldn't facilitate the routing process to the approver. Option C (API) is a custom development approach that is unnecessary given the standard Workflow functionality.

#### NEW QUESTION # 24

A system administrator in Ursa Major Solar wants to load Sell through volume of a customer in data processing engine for read as a key performance indicator (KPI).

Which permission set license should a consultant recommend assigning so that the system administrator is able to load the data?

- **A. CGC Processing Services Register**
- B. Lightning Trade Promotion Management Psl
- C. CGC Retail and Trade Promotion Management Psl

**Answer: A**

Explanation:

In the Salesforce Consumer Goods Cloud (CGC) architecture, high-volume calculations and data processing for Trade Promotion Management (TPM) are handled by the Cloud Processing Service (CPS). This off-platform engine is necessary to manage the massive data grids involved in promotion planning.

When a System Administrator needs to interact directly with this engine—specifically to load, register, or sync external data sources (like "Sell through volume") so they can be read as KPIs—they require specific privileges that go beyond standard CRM access.

The CGC Processing Services Register permission set license is explicitly designed for this administrative purpose.

This license grants the user the necessary API rights and access controls to manage the Data Processing Engine (DPE) definitions and trigger the synchronization jobs that hydrate the CPS with data. Without this specific license, the administrator might be able to see the TPM application screens (if they have the TPM license, Option A), but they would lack the backend permissions required to configure the data ingestion pipelines that feed the calculation engine.

#### NEW QUESTION # 25

A client is requesting a real-time report on the promotion detail to show key performance indicator (KPI) values at the Promotion Total level. The client wants this implemented to help the user gauge and understand the impact of the Planned Promotion instantaneously.

How should the consultant design this? 5

- A. Create a new Real-Time Reporting (RTR), which uses a Flatlist UI Component, add the required KPIs, and then embed the report on the Promotion record page.
- B. Create a custom Lightning component that reads the value of the KPIs through the KPI Map functionality and embed the UI Component on the Promotion record page.
- **C. Create a custom Scorecard Real-Time Reporting (RTR) and enable the required KPIs as Report relevant and add them to RTR Config, then embed the report on the Promotion record page.**

**Answer: C**

#### Explanation:

To meet the requirement of showing "Promotion Total" values (aggregated scalars like Total ROI, Total Spend, or Total Uplift) rather than a time-series grid, the consultant should utilize the Scorecard component of the Real-Time Reporting (RTR) module.

\* Scorecard RTR: This UI component is specifically designed to display single, high-level summary metrics (KPIs) in a card format. It is ideal for "at a glance" impact analysis.

\* Configuration: The process involves:

\* Flagging the necessary KPIs (e.g., Total Volume, ROI) as "Report Relevant" in the KPI Set configuration so they are exposed to the reporting layer.

\* Adding these KPIs to the RTR Configuration JSON.

\* Embedding this specific Scorecard component on the Promotion Record Page in Lightning App Builder.

\* Why not Flatlist? A Flatlist (Option B) is typically used for tabular, time-phased data (e.g., a grid showing Volume Week 1, Week 2, Week 3). For a "Total Level" summary, a Flatlist is the wrong visualization tool.

#### NEW QUESTION # 26

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