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Salesforce Certified Sales Cloud Consultant

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1. Cloud Kicks is migrating from its current CRM application to Salesforce in phases across various

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問題 #145

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

What should the consultant do to convert a Lead into a Person Account?

- A. Leave the Company field blank.
- B. Enable Contact Roles.
- C. Create an Apex trigger on the Lead object.

答案: A

解題說明:

When Person Accounts are enabled in a Salesforce organization, they allow users to represent individual customers without the need for an associated company. To convert a lead into a Person Account, the key step is to leave the "Company" field blank on the lead record. This signals Salesforce to convert the lead into a Person Account rather than a Business Account.

Here's how it works:

Person Account Conversion Criteria: Salesforce uses the presence or absence of data in the Company field to determine whether to convert a lead into a Business Account (when Company is populated) or a Person Account (when Company is blank).

Streamlined Process: Leaving the Company field blank during lead entry ensures that the lead is treated as an individual, resulting in a Person Account upon conversion. No additional configurations or custom triggers are needed.

Person Account Use Cases: Person Accounts are especially useful for B2C scenarios where individual customers do not have a company affiliation, as they combine Account and Contact functionalities into a single record.

Option A (Enable Contact Roles) and Option C (Create an Apex Trigger) are not necessary for this task, as Person Account conversion can be handled directly by Salesforce's standard lead conversion logic. For more details on converting leads to Person Accounts, refer to Salesforce's Person Accounts documentation.

問題 #146

Northern Trail Outfitters (NTO) sells products that require frequent collaboration with the same team of individuals who play a key role in closing deals. The lead sales representative determines the level of access for each of the collaborating team members on the opportunity. What solution should the consultant recommend to facilitate the collaboration of the lead sales representative and team members?

- A. Create a public groups for extended team members and allow the sales representative to assign manual sharing on their opportunities.
- B. Define a sharing rule for each lead sales representative to assign appropriate access for all extended team members
- C. Configure default opportunity teams for all lead sales representatives with team selling enabled
- D. Enable chatter to have the lead sales representative facilitate collaboration through sales team sharing

答案: C

問題 #147

When emails sync by Einstein Activity Capture, how are the emails matched to Sales Cloud records?

- A. Matching is based on Full Name and standard Email field.
- B. Matching is based on any Email field.
- C. Matching is based on the standard Email field.

答案: C

解題說明:

When emails sync by Einstein Activity Capture, the matching to Sales Cloud records is based on the standard Email field. Einstein Activity Capture automatically associates emails and events with the correct Salesforce records by looking at the email addresses of the recipients. The standard Email field on Contact, Lead, and User objects is used to make these associations, ensuring that activities are accurately reflected in the related records.

問題 #148

The sales management team of Universal Containers has noticed that opportunities are taking longer to close. Historically, it has taken 30 days for a new opportunity to be moved to closed/won. Recently, this time period has increased to 45 days.

Which two reporting tools can the sales management team leverage to help determine the cause? (Choose two.)

- A. Dashboard of opportunity stage duration
- B. Report on campaign return on investment (ROI)
- C. Dashboard of month-over-month trend of lead conversions
- D. Report on the discount approval time for quotes

答案: A,D

問題 #149

Cloud Kicks has recently hired a new inside sales team. Management wants to ensure that steps in the sales process are clear and adhered to by the team. Each step must have clear guidelines, support materials, and coaching tips.

What should the consultant recommend to support the new sales team and management?

- A. Create a flow paired to each of the Opportunity stages.
- B. Create validation Rules on the Opportunity Stage field.
- C. Create a Path on the Opportunity object.

答案: C

問題 #150

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