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Topic Break Down

Topic	No. of Questions
Topic 1, Discovery	55
Topic 2, Solution Design	36
Topic 3, Product Catalog	30
Topic 4, Pricing	35
Topic 5, Transaction Management	55
Topic 6, Billing	37
Total	248

QUESTION NO: 1

What are three risks when using too many cross object formula fields in aRevenue Cloud Project?

A. Formula field data is not always availablеduring CPQ quote calculation

B. Formula fields have unlimited access to object manyrelationships away which makesit vulnerable to data changes.

C. They are computationally Expensive.

D. They can easily exceed limits if not carefully designed and tested

E. Formula Fields are editable, after the calculation completes the sales user or processautomation can overwrite its value

ANSWER: A C D

Explanation:

“Formula field data is not always availablеduring CPQ quote calculation,” “They are computationally Expensive.,” and “They can easily exceed limits if not carefully designed and tested” identify the principal risks. Revenue Cloud and Salesforce CPQ calculations run through managed calculation processes that depend on the fields and data made available in the calculation context. A cross-object formula is evaluated dynamically from related-record data rather than being a stored value, so it should not be relied on where quote calculation requires predictable, current, calculation-time inputs. Design important pricing inputs with fields and automation appropriate to the calculation process.

Cross-object formulas can also add evaluation work whenever records, list views, reports, or pages access them. Formula complexity, relationship traversal, and high record volumes can therefore contribute to slower performance. Finally, Salesforce applies formula compilation and relationship-reference limits. In particular, cross-object references consume unique relationship references, and an overly complex formula can exceed platform limits or become difficult to maintain. Reviewing formula architecture, reducing unnecessary relationship traversal, and testing realistic quote volumes help prevent these risks. Salesforce documents formula-field behavior and cross-object relationship considerations in its Formula Fields documentation and provides CPQ calculation guidance in the Salesforce CPQ Advanced Calculator overview.

QUESTION NO: 2

A Company that sells hardware and software has a project Requirement to migrate legacy Install base into salesforce CPQ along with the contract. Which objects will need to be populated for this effort?

A. Order

B. Assets

C. Quote

D. Subscriptions

E. Order Product.

F. Assets and Subscriptions

ANSWER: F

Explanation:

Assets and Subscriptions is correct because Salesforce CPQ represents an installed base differently based on the nature of what was sold. Hardware and other non-recurring products are represented by Asset records. Assets identify products the customer owns and provide the installed-product context needed for downstream sales and service processes. Recurring software products are represented by Salesforce CPQ Subscription records. A subscription retains the contractual term, quantity, pricing, and product information that CPQ needs when processing amendments, renewals, and related lifecycle transactions.

For a legacy migration, the corresponding Contract must also be established and related to the appropriate account so the migrated subscription data has the correct contractual context. Populating both Assets and Subscriptions preserves the

complete installed base for a company selling a mixture of hardware and recurring software: the hardware ownership is captured as assets, while the software entitlement and term-based commercial relationship are captured as subscriptions. This alignment enables CPQ to recognize the existing customer state rather than treating those products as entirely new purchases. Salesforce's standard Asset object documentation is available in the Salesforce Asset Object Reference, and Salesforce CPQ contracting and renewal concepts are covered in the Salesforce CPQ Contracts Trailhead module.

QUESTION NO: 3

What are three key characteristics of an implementation partner leading arevenuecloud scoping session?

A. Excellent Communication Skills both verbal and written

B. Being effective at planning,monitoring and reviewing

C. Having deep knowledge of competitor Products

D. Experience in a selling role with quota responsibilities

E. Understanding design pitfalls and Mitigation actions to course correct

ANSWER: A B E

Explanation:

Excellent Communication Skills both verbal and written, **Being effective at planning,monitoring and reviewing**, and **Understanding design pitfalls and Mitigation actions to course correct** are core characteristics for a partner facilitating a Revenue Cloud scoping session. Scoping is a collaborative discovery activity: the partner must elicit business objectives, clarify process and data requirements, document decisions, and ensure that business and technical stakeholders share the same expectations. Clear verbal facilitation and precise written outputs are therefore essential to turn discussions into an actionable scope.

Planning, monitoring, and reviewing are equally important because the partner needs to structure workshops, manage assumptions and dependencies, validate findings as they emerge, and keep the proposed implementation aligned to agreed outcomes. Revenue Cloud projects commonly involve interconnected product, pricing, quoting, contracting, ordering, and billing processes, so ongoing review helps identify gaps before they become costly design changes. Finally, practical awareness of design pitfalls and mitigation actions enables the partner to recognize risks early, explain trade-offs, and recommend a feasible path forward that supports a scalable solution. Salesforce emphasizes discovery, alignment, and a well-defined implementation approach in its Revenue Cloud resources: Salesforce Revenue Lifecycle Management and Salesforce Well-Architected.

QUESTION NO: 4

Which usage summary field can be used as an external ID to simplify usage uploads after amendments?

A. Legal entity

B. invoice run

C. auto number

D. source

E. matching ID

ANSWER: E

Explanation:

matching ID is the correct field because it provides a business-facing identifier that can be supplied with incoming usage data to locate the applicable Usage Summary. This is particularly valuable after an amendment, when subscription-related records and the identifiers used by an upstream usage source can otherwise become more difficult to reconcile. By storing

and sending the Matching ID as the external identifier in each usage upload, an integration can consistently associate usage with the intended summary record without depending solely on Salesforce-generated record IDs or on billing-run details.

In a Revenue Cloud usage-management implementation, the Matching ID should be established as part of the integration's mapping and retained by the external metering or event source. The upload process can then use that known identifier to identify the target Usage Summary as subscription changes are processed. This supports reliable, repeatable ingestion of usage events and reduces the operational effort of updating source-system mappings after contract amendments. Salesforce's Revenue Cloud documentation describes the platform's usage-based capabilities and the related configuration model: Salesforce Revenue Cloud. For broader implementation guidance and Revenue Cloud learning resources, see Salesforce Trailhead Revenue Cloud.

QUESTION NO: 5

Universal Containers is implementing Revenue Cloud for a business unit that already uses a legacy CPQ system, what consideration should be taken asthe implementation partner?

A. Map legacy CPQ system capabilities to ensure there is no loss of logic from the older system

B. Transform the customer's business processes, capture new requirements for the newRevenue cloud, technology

C. Keep the legacy CPQ system and build to the gaps in Revenue Cloud so the customer can use both systems to satisfy requirements

D. Customize Revenue Cloud's user interface so the customer experiences no major interruption to the new system

ANSWER: B

Explanation:

Transform the customer's business processes, capture new requirements for the newRevenue cloud, technology is the right implementation consideration because a Revenue Cloud project should be driven by the organization's desired future-state revenue processes, rather than by a one-for-one recreation of a legacy CPQ implementation. The implementation partner should facilitate discovery with business and technical stakeholders to understand current pricing, product configuration, quoting, contracting, ordering, and renewal processes; identify pain points and opportunities; and document requirements that align with Revenue Cloud's capabilities and the customer's business goals.

This approach helps the customer simplify processes, standardize policies where appropriate, and use platform capabilities intentionally. Existing legacy processes remain valuable input during discovery, especially where they represent critical business rules, but they should be evaluated and prioritized as requirements instead of being treated as logic that must automatically be preserved. A clear target-state design, supported by documented requirements and an adoption plan, gives the business a sustainable transition path and helps realize the benefits of an integrated revenue lifecycle platform. Salesforce describes Revenue Cloud as a platform for connecting the revenue lifecycle across sales and service channels; see Salesforce Revenue Cloud and Salesforce Revenue Cloud Basics on Trailhead.

QUESTION NO: 6

A user reports they are unable to see the Managed Asset Viewer on Account record pages A Revenue Cloud Consultant investigates and confirms that the Managed Asset Viewer component has not been added to the Account record page

How should the consultant ensure that users can view and edit asset data using the Managed Asset Viewer?

A. In Lightning App Builder, drag the Managed Asset Viewer to the Account record page. Select the checkbox to show the side panel when a user clicks a record link.

B. Assign the user a permission set that grants Read access to Account record pages and Read access to Assets. Next, drag it onto the Account page layout.

C. Verify that the user has the Revenue Lifecycle Management license. Then, enable the Assets-related list on the Account record page to show the Managed Asset Viewer

ANSWER: A

Explanation:

In Lightning App Builder, drag the Managed Asset Viewer to the Account record page. Select the checkbox to show the side panel when a user clicks a record link. This is the required configuration because the Managed Asset Viewer is a Lightning page component and is not displayed on an Account record merely through page-layout related lists or object permissions. Adding the component to the appropriate Lightning record page makes the managed-asset experience available in the Account context. Activating the updated page for the relevant app, record type, and user profiles ensures that the intended users receive that version of the Account page. Enabling the side-panel behavior allows users to select a linked asset record in the viewer and open its details in context, supporting review and edits without leaving the asset-viewing workflow. Access to the underlying Account and asset records must still be governed by the organization's normal object permissions, field-level security, sharing, and applicable Revenue Cloud entitlement, but those controls do not replace adding the component itself. Salesforce's Lightning App Builder documentation describes how administrators add and activate components on record pages: Salesforce Help: Lightning App Builder. Additional official Revenue Cloud learning resources are available at Salesforce Trailhead.

QUESTION NO: 7

What three key considerations for legacy data migration will expand the project scope of a Revenue Cloud implementation?

A. Fragmented and incomplete information will need to be aggregated and validated, otherwise the solution will yield unexpected results

B. Extracting from multiple sources takes additional resourcesand time to access and process

C. The creation of external objects will bypass the need for legacy data migration

D. The Amendments and Renewals process will be subject to customizations

E. Large volumes of data take a longer time to load.

ANSWER: A B E

Explanation:

"Fragmented and incomplete information will need to be aggregated and validated, otherwise the solution will yield unexpected results," "Extracting from multiple sources takes additional resourcesand time to access and process," and "Large volumes of data take a longer time to load." are key scope-expanding migration considerations. Revenue Cloud relies on reliable historical customer, product, price, quote, contract, asset, and subscription information to support downstream selling, amendments, renewals, and reporting. When source information is fragmented or incomplete, the implementation must include additional discovery, mapping, cleansing, deduplication, enrichment, and business validation before records can be trusted in the target org. Extracting records from several legacy applications similarly expands the effort because each source can require separate access arrangements, extraction methods, data profiling, transformations, reconciliation, and test cycles. Finally, high data volumes affect migration architecture and delivery planning: loads may need to be sequenced, batched, monitored, retried, and reconciled, while staying within platform and operational limits. These activities require additional time, technical resources, and stakeholder involvement, so they should be assessed early as explicit scope items rather than treated as a simple import. Salesforce's data-migration architecture guidance discusses planning, data quality, mapping, and validation considerations, while its large-data-volume learning material covers the operational impact of data scale. See Salesforce Data Migration Architecture and Salesforce Large Data Volumes.

QUESTION NO: 8

An invoice run with a target date of 6/1/20 has completed with no errors.an order product with a next billing date of 6/1/20 did not generate an invoice line. which of the following fields might hold a value that would account for this?

A. Billing type

B. Next change date

C. billing account

D. Billing day of month

E. Invoice run processing status

ANSWER: E

Explanation:

Invoice run processing status is the field that can account for an otherwise eligible order product not producing an invoice line. Salesforce Billing uses processing-status information to control and track whether a record is available for invoice-run processing or has already been handled, is currently being handled, or is otherwise not eligible for selection. Therefore, a completed invoice run with no run-level errors does not by itself establish that every order product whose Next Billing Date matches the target date was selected. An order product can be skipped when its invoice-run processing state indicates that it should not be processed by that run.

When troubleshooting this scenario, review the order product's invoice-run processing state together with its billing dates and related billing-account configuration. If the status reflects an unfinished, retained, or otherwise non-eligible processing condition, the invoice run can complete successfully while omitting that product's invoice line. This is especially relevant when invoice processing was previously interrupted or when records were prepared by an earlier process. Salesforce Billing invoice runs evaluate record eligibility and update processing information as part of their processing lifecycle. See Salesforce's Invoice Runs documentation and the Salesforce Billing Basics Trailhead module for billing and invoice-run concepts.

QUESTION NO: 9

Which corrective action should an admin take after noticingan error on a posted invoice?

A. Cancel and rebill, correct the order, create and post a new invoice.

B. Change the status from Posted to draft on the invoice, correct the invoicing error and repost it

C. Delete the invoice record, correct the order, create and Post a new invoice

D. credit the invoice, correct the order, create and post a new invoice

ANSWER: A

Explanation:

Cancel and rebill, correct the order, create and post a new invoice. is the appropriate corrective process for an error discovered on a posted invoice. Posted invoices are financial records and should be handled through the supported invoice-correction workflow rather than by directly changing their status or deleting them. The Cancel and Rebill action reverses the billing result associated with the invoice and returns the relevant order and billing data to a state where the underlying issue can be corrected. After the administrator corrects the order details, they can generate a replacement invoice and post it, preserving an accurate audit trail for the original billing event and its correction. This approach is particularly important where invoice lines, prices, quantities, account details, or billing terms require changes, because those corrections belong in the source order or related billing data before a new invoice is issued. Salesforce Revenue Cloud billing processes are designed to maintain traceability between orders, invoice lines, and invoice status changes, so using the formal cancellation and rebilling process helps ensure downstream financial reporting remains consistent. See Salesforce's Revenue Cloud documentation and the Revenue Cloud Billing documentation for billing workflow guidance.

QUESTION NO: 10

Which 3 Customer Teams Should be invited to participate in scoping revenue cloudproject?

A. Information Technology

B. Technology

C. Sales operations

D. Accounting and finance

E. Customer Service

F. Human Resource

ANSWER: A C D

Explanation:

Information Technology, **Sales operations**, and **Accounting and finance** should participate from the start of a Revenue Cloud scoping engagement because they collectively define the operational, technical, and financial requirements for the solution. Information Technology assesses the Salesforce architecture, integrations, identity and access design, data migration approach, security, and ongoing support model. Its involvement ensures that the proposed solution is feasible within the customer's broader technology landscape. Sales operations represents the teams that own and administer selling processes, including product and price management, approvals, quote-to-order workflows, sales-user experience, and reporting requirements. Accounting and finance is essential because Revenue Cloud processes ultimately affect billing, invoicing, payments, taxation, revenue-related controls, financial reporting, and downstream ERP or general-ledger integrations. Bringing these teams into discovery and scoping creates an end-to-end view of the revenue lifecycle, enables clear ownership of requirements and decisions, and helps identify dependencies before delivery planning begins. Salesforce describes Revenue Cloud as a connected platform for managing the revenue lifecycle, making cross-functional alignment particularly important. See the Salesforce Revenue Cloud overview and Salesforce CPQ Basics on Trailhead.

QUESTION NO: 11

Which three activities should be included in a Revenue Cloud data migration strategy? (Choose 3 options)

A. Define the system of record for each migrated data domain.

B. Cleanse and standardize source data before loading.

C. Reconcile migrated record counts and financial values.

D. Load all historical source-system records without validating data quality.

E. Allow each business team to decide which records to migrate after go-live.

ANSWER: A B C

Explanation:

Define the system of record for each migrated data domain, **Cleanse and standardize source data before loading**, and **Reconcile migrated record counts and financial values** are key migration activities. Revenue Cloud implementations commonly require data for accounts, products, prices, contracts, subscriptions, assets, orders, and billing records. The team must establish which system owns each data set so that conflicting data is not loaded or synchronized without governance.

Data cleansing identifies duplicate accounts, invalid product references, incomplete dates, and inconsistent values before those issues become part of the new solution. Reconciliation validates that the intended records, quantities, balances, and financial values were loaded successfully and can support downstream quote-to-cash processes. See Salesforce guidance on planning data migration in Data Management on Trailhead.

QUESTION NO: 12

A Revenue Cloud implementation includes a high-volume integration between Salesforce and an external order-management system. Which three design decisions support a scalable and supportable integration? (Choose 3 options)

A. Define idempotency and duplicate-message handling

B. Use asynchronous processing where immediate user feedback is not required

C. Implement monitoring and actionable error logging

D. Require users to refresh the quote page until the external system responds.

E. Store all external-system error details only in email messages to individual developers.

ANSWER: A B C

Explanation:

Define idempotency and duplicate-message handling, **use asynchronous processing where immediate user feedback is not required**, and **implement monitoring and actionable error logging** are key design decisions. Idempotency prevents a retry or duplicate message from creating duplicate orders, invoices, or fulfillment actions. Asynchronous processing separates long-running external work from the user's transaction and helps reduce timeout and governor-limit risk.

Monitoring and error logging give support teams sufficient information to identify failed records, determine the cause, and safely retry or correct the transaction. These controls should be defined with clear operational ownership before go-live. See Salesforce's Salesforce Well-Architected guidance for resilient and scalable solution design.

QUESTION NO: 13

What are the 3 reasons why you would need an app exchange solution to support generating a document is support of a revenue cloud project?

A. watermarks

B. Attachments

C. Electronic signature

D. Contract Redlining

E. Invoice Generation

ANSWER: A C D

Explanation:

watermarks, **Electronic signature**, and **Contract Redlining** are document-lifecycle capabilities that commonly require an AppExchange document-generation or contract-lifecycle-management integration in a Revenue Cloud implementation. A generated quote, proposal, order form, or contract often needs a visible watermark to communicate its status, such as draft, confidential, or void, before it is sent externally. This is a document-presentation and governance feature that specialized document tools can apply consistently across generated outputs.

Electronic signature is essential when the commercial document must move from generated content to a legally actionable agreement. AppExchange e-signature integrations can send the generated document to recipients, capture signature activity, and return completion status to Salesforce so the revenue process can continue with an auditable record. Contract redlining supports the negotiation stage: stakeholders can propose, review, and reconcile contract-language changes before execution. These capabilities extend the core generation of a document into controlled collaboration, negotiation, and signature workflows. Salesforce highlights AppExchange solutions for extending Salesforce with connected applications, while Salesforce’s e-signature guidance describes using integrations to prepare, send, and track signature requests. See Salesforce AppExchange and Salesforce e-signature overview.

QUESTION NO: 14

What are two benefits to having trained customer CPQ admins participate in the planning, design and build phases?(Q2R)

A. Facilitates a more efficient test phase

B. Eliminates the need for documentation

C. Increases the commercial value to the paid engagement

D. Presents more opportunity for customers to ask for new requirements

E. Customer is better equipped to scale and maintain functionality post-golive

ANSWER: A E

Explanation:

Facilitates a more efficient test phase is a benefit because trained customer CPQ administrators understand the organization's product catalog, pricing policies, approval processes, and intended business outcomes. Their participation during planning, design, and build gives them the context needed to develop meaningful test scenarios, validate configurations against real-world selling processes, recognize gaps earlier, and support faster user acceptance testing.

Customer is better equipped to scale and maintain functionality post-golive is also a core benefit. Involving customer administrators throughout implementation builds practical ownership and knowledge of the solution's architecture, configurations, dependencies, and operational processes. After deployment, those admins can more confidently manage routine changes, maintain the CPQ implementation, troubleshoot configuration issues, and extend functionality as products, pricing, and business requirements evolve. This supports a sustainable operating model and reduces avoidable dependence on implementation resources for ordinary administration.

Salesforce emphasizes building internal capability through enablement and a well-defined governance approach so that teams can administer and evolve their Salesforce solutions over time. See Salesforce CPQ Admin Essentials and Salesforce CPQ Administration documentation.

QUESTION NO: 15

A product designer is setting up a product bundle that consists of T-shirts and caps. They want to ensure customers can order a maximum of three T-shirts and three caps, but the total number of products should not exceed five.

How should the product designer set this up?

A. • Define the local cardinality for T shirts with a minimum quantity of one and a maximum quantity of three.• Define the local cardinality for caps with a minimum quantity of one and a maximum quantity of three.• Define two product groups: one that contains T-shirts and another that contains caps. Set the group cardinality for both groups with a minimum quantity of one and a maximum quantity of five.

B. • Define the local cardinality for T-shirts with a minimum quantity of one and a maximum quantity of three• Define the local cardinality for caps with a minimum quantity of one and a maximum quantity of three.• Define a product group that contains both of these products, and set the group cardinality with a minimum quantity of one and a maximum quantity of five.

C. • Define the local cardinality for T-shirts with a minimum quantity of three and a maximum quantity of three.

ANSWER: B

Explanation:

Define the local cardinality for T-shirts with a minimum quantity of one and a maximum quantity of three; define the local cardinality for caps with a minimum quantity of one and a maximum quantity of three; and define a product group that contains both of these products, with group cardinality set to a minimum quantity of one and a maximum quantity of five. Local cardinality controls the quantity allowed for each individual child product in the bundle. Therefore, each item can be selected no more than three times. Group cardinality applies across all products within the same group, so a maximum of five prevents the combined T-shirt and cap quantity from exceeding five. For example, a customer can select three T-shirts and two caps, or two T-shirts and three caps, while remaining within both the individual-product and total-group limits. Setting the minimum values to one also makes each child product eligible for selection while requiring at least one product from the group. This setup combines product-level quantity limits with the bundle-level aggregate limit needed for the stated purchasing rule. Salesforce describes bundle configuration and product-relationship concepts in its Revenue Cloud product catalog resources: Salesforce Help: Product Relationships and Trailhead: Product Catalog Management.

QUESTION NO: 16

Some of the users at universal containers have faced long processing times during quote document generation. What can be done to reduce the processing times for document generation?

A. Reducing the number of product rules and option constraints

B. increase the number of product of product rules and option constraints

C. using compressed image formats for image files included in the quote document

D. reducing the number of quote line fields displayed in the quote line editor

E. reducing the number of line columns that are included in the quote document

ANSWER: C E

Explanation:

Using compressed image formats for image files included in the quote document and reducing the number of line columns that are included in the quote document both reduce the amount of data and rendering work required when Salesforce generates the final document. Images can substantially increase a document's payload, particularly when logos, product images, or other graphics are repeated across pages or line items. Optimized, compressed images lower file-transfer and rendering overhead while retaining an appropriate visual quality for the generated output. Similarly, each line column in a quote template requires Salesforce to retrieve, format, and render data for every applicable quote line. Limiting the document to columns that recipients genuinely need reduces repeated processing across potentially large quotes and produces a smaller, faster document. This is especially useful for high-volume quotes with many line items, where the cumulative cost of each additional column becomes significant. Salesforce quote templates are designed to control which quote and line-item fields are presented in generated documents, so template design should prioritize concise, business-relevant output. See Salesforce's Quote Templates Trailhead module and Salesforce Help on quote templates.

QUESTION NO: 17

Which three documents help a revenue cloud consultant better understand the client's

Revenue Cloud Project requirements before speaking for the first time in a scoping session?

A. A sample proposal the client provides to their customers

B. Brochures that provided detail to the products and services the client offers

C. The latest release notes found at help salesforce.com>salesforce CPQ patch notes

D. An approval matrix documentation that describe the approvals needed before a quote is sent to the customer

E. The clients income statements and balance sheet.

ANSWER: A B D

Explanation:

A sample proposal the client provides to their customers, **Brochures that provided detail to the products and services the client offers**, and **An approval matrix documentation that describe the approvals needed before a quote is sent to the customer** are valuable discovery inputs because they expose the business processes that Revenue Cloud must support. A customer-facing proposal gives the consultant an early view of the expected quote or proposal output, including how products are presented, which commercial details appear, and what document-generation requirements may be needed. Product and service brochures establish the scope of the sellable catalog: offerings, bundles, service levels, terminology, and possible product-rule or pricing considerations. The approval matrix identifies the organization's quote-governance model, such as approval thresholds, responsible roles, and conditions that require review before a customer receives a quote. Together, these documents allow the consultant to prepare focused scoping questions about catalog design, pricing, proposal generation, and approval workflows rather than beginning discovery without business context. Salesforce emphasizes understanding product configuration, pricing, quoting processes, and approval needs when planning a Revenue Cloud or CPQ implementation. See Salesforce CPQ Basics and Salesforce CPQ approval documentation.

QUESTION NO: 18

A Revenue Cloud customer is preparing users for a new quoting and billing process. Which three change-management activities should the implementation team recommend? (Choose 3 options)

A. Identify business champions from affected teams.

B. Deliver role-based training using realistic business scenarios.

C. Establish a process for collecting and addressing user feedback after go-live.

D. Restrict all configuration decisions to the implementation team after training begins.

E. Provide the same technical administrator training to every sales user.

ANSWER: A B C

Explanation:

Identify business champions from affected teams, **Deliver role-based training using realistic business scenarios**, and **Establish a process for collecting and addressing user feedback after go-live** are effective change-management activities. Business champions help communicate the purpose of the new process, provide peer support, and identify adoption concerns within their teams.

Role-based training gives sales users, sales operations, finance users, and administrators practice with the activities they will actually perform, such as creating quotes, submitting approvals, reviewing invoices, or managing exceptions. A feedback process after go-live enables the project team to identify training gaps, adoption issues, and improvement opportunities while maintaining clear governance for changes. See Salesforce Trailhead for Change Management Basics.

QUESTION NO: 19

Which 3 Customer Teams Should be invited to participate in scoping revenue cloud project?

A. Information Technology

B. Sales operations

C. Accounting and finance

D. Customer Service

E. Human Resource

ANSWER: A B C

Explanation:

Information Technology, **Sales operations**, and **Accounting and finance** should participate from the outset because a Revenue Cloud scope spans the complete commercial process, not only the sales user experience. Information Technology provides the technical view of the current Salesforce landscape, integrations, identity and access requirements, data architecture, and downstream systems that must exchange product, pricing, order, and customer data. Sales operations defines how sellers use accounts, opportunities, products, approvals, price books, quoting policies, territories, and performance processes; this ensures the designed solution supports practical selling motions and governance. Accounting and finance is essential because Revenue Cloud processes can affect billing, invoicing, taxation, payments, revenue-related controls, financial-system integration, and audit requirements. Their participation identifies financial dependencies and compliance needs early enough to include them in the project design and estimate. Together, these teams provide the business-process, operational, technical, and financial perspectives needed to establish an implementable scope, prioritize requirements, define integration boundaries, and avoid discovering critical downstream impacts after configuration has begun. Salesforce positions Revenue Cloud as a connected solution for quoting, contracting, ordering, billing, and revenue operations, which requires collaboration across these functions. See Salesforce Revenue Cloud and Salesforce Trailhead: Revenue Cloud Foundations.

QUESTION NO: 20

Universal Containers sell boxes based on size, Price for a specific product is based on the selection of length and width and height, which cpq pricing functionality should be used here?

A. Percent of total

B. Multi Dimensional Quoting

C. Discount Schedule

D. Price Rule with lookup table

ANSWER: D

Explanation:

Price Rule with lookup table is the appropriate functionality because the price depends on a combination of independently selected product attributes: length, width, and height. A Salesforce CPQ price rule can evaluate the quote line's configured values and then use a lookup query against a custom lookup table containing the valid dimension combinations and their corresponding prices. The rule can write the returned price into a target pricing field, such as List Price or Special Price, so that the quote reflects the box price for the selected dimensions.

This approach is maintainable when a business has a defined pricing matrix. Administrators can add or revise rows in the lookup table as box sizes and prices change, without creating a separate product for every possible combination or embedding extensive conditional logic in formulas. The dimensions should be captured through configuration attributes or fields that are available to the price rule when it evaluates the quote line. Salesforce CPQ price rules support lookup queries specifically for retrieving values from lookup tables and applying them to quote or quote-line fields. See Salesforce's Price Rules in Salesforce CPQ Trailhead module and the Salesforce CPQ Price Rules documentation.

QUESTION NO: 21

After installing salesforce CPQ in your customer Sandbox org you notice unacceptable performance times as the primary quote syncs to the opportunity its determined the cause for sub optimal performance is attribute to 30 process builders referencing the quote and opportunity along with other heavy customization that was previously created. what strategy should the revenue cloud consultant recommend to the customer?

A. Architect the revenue cloud solution to follow suit by

B. extending customization using coding best practices to improve scalability

C. baseline current performance recommend to identify and address the technical debt first before designing the revenue cloud solution categorize the subpar customizations as 'out of scope'. processed with design and build, and address performance issues as the final task in UAT

D. upgrade the org to the latest CPQ and billing release, this will largely address the performance issues

ANSWER: B

Explanation:

"extending customization using coding best practices to improve scalability" is the appropriate recommendation because the documented cause is automation and customization that executes when CPQ synchronizes the primary quote with the opportunity. Quote synchronization can initiate substantial downstream processing on both records, so scalable, bulk-aware implementation patterns are essential. The consultant should assess the existing automation, consolidate or redesign redundant logic, and implement efficient declarative or programmatic automation that minimizes repeated record updates, avoids unnecessary queries and DML operations, and safely handles bulk transactions. This is particularly important when the organization already has numerous Process Builder processes on the same objects; Salesforce recommends moving Process Builder automation to Flow, since Process Builder is being retired. A well-designed automation architecture also establishes clear ownership of record updates and prevents recursive or overlapping execution during quote synchronization. These changes improve the solution's ability to perform consistently as quote volume, line counts, and customization grow, rather than relying on a package upgrade or postponing known performance work until late testing.

Salesforce's architecture guidance emphasizes designing for scale and operational reliability, while Salesforce's automation guidance provides the path for modernizing Process Builder logic. See Salesforce Help: Migrate Process Builder to Flow and Salesforce Well-Architected: Reliability.

QUESTION NO: 22

A sales rep adds a bundle product from the Browse Catalog and saves it to their quote. They are unable to configure the Bundle from the Transaction Line Table or Browse Catalog

Which permission is the sales rep missing?

A. Product Configuration Rules User

B. Advanced Configurator Designer

C. Product Configurator

ANSWER: C

Explanation:

Product Configurator is the required permission because it grants a sales rep access to configure bundle products after they have been added to a transaction or quote. In Revenue Cloud, adding a bundle to the cart or transaction line table and configuring its components are related but distinct actions. The user must have configurator access to open the bundle's configuration experience, select valid child products, update quantities or attributes, and save the resulting bundle structure back to the transaction. This permission supports configuration entry points from both Browse Catalog and the Transaction Line Table, which matches the reported issue: the representative can add and save the bundle but cannot configure it afterward. Assign the Product Configurator permission through the appropriate permission set or permission-set group for the sales role, then confirm that the user also has access to the relevant products, catalogs, and transaction records. Salesforce Revenue Cloud documentation and learning materials describe product configuration as a controlled capability used to create valid, sellable bundle selections. See Salesforce Revenue Cloud Developer Documentation and Salesforce Help: Revenue Cloud Product Configurator.

QUESTION NO: 23

A product designer is setting up a product bundle that consists of T-shirts and caps. They want to ensure customers can order a maximum of three T-shirts and three caps, but the total number of products should not exceed five.

How should the product designer set this up?

A. â€¢ Define the local cardinality for T shirts with a minimum quantity of one and a maximum quantity of three.â€¢ Define the local cardinality for caps with a minimum quantity of one and a maximum quantity of three.â€¢ Define two product groups: one that contains T-shirts and another that contains caps. Set the group cardinality for both groups with a minimum quantity of one and a maximum quantity of five.

B. â€¢ Define the local cardinality for T-shirts with a minimum quantity of one and a maximum quantity of threeâ€¢ Define the local cardinality for caps with a minimum quantity of one and a maximum quantity of three.â€¢ Define a product group that contains both of these products, and set the group cardinality with a minimum quantity of one and a maximum quantity of five.

C. â€¢ Define the local cardinality for T-shirts with a minimum quantity of three and a maximum quantity of three.

ANSWER: B

Explanation:

Define the local cardinality for T-shirts with a minimum quantity of one and a maximum quantity of three; define the local cardinality for caps with a minimum quantity of one and a maximum quantity of three; and define a product group containing both products with a minimum quantity of one and a maximum quantity of five. This configuration applies constraints at the two required levels. Local cardinality controls the allowable quantity for each individual child product in the bundle, so neither

T-shirts nor caps can be selected in a quantity greater than three. Group cardinality controls the aggregate quantity of all products assigned to that group. Placing both T-shirts and caps in the same group and setting its maximum to five ensures that their combined quantity cannot exceed five. For example, a customer can select three T-shirts and two caps, or two T-shirts and three caps, while remaining within both the individual-product limits and the bundle-wide combined limit. This use of product-child cardinality together with group cardinality lets a designer model both per-item and cross-item quantity rules without requiring custom logic. Salesforce Revenue Cloud supports configuring product relationships and bundle constraints as part of catalog and product configuration design. See Salesforce Help: Product Relationships and Trailhead: Revenue Cloud Product Catalog.

QUESTION NO: 24

A solution is being designed for migrating a customer's install base to Revenue Cloud. The customer states that it is extremely critical for the installed base to work fine in Revenue Cloud so that there is no business disruption, as a large part of their business is Amendments and Renewals.

Apart from the Product, Product Selling Model, and Pricebook, which other key objects should be included in the discovery to help design this migration?

A. Asset, Asset Action, Asset State Period, Asset Action Source

B. Quote, Quote Line, Order, Order Product

C. Asset, Subscription, Subscribed Asset, Order

ANSWER: A

Explanation:

Asset, Asset Action, Asset State Period, Asset Action Source is correct because an install-base migration must preserve not just the customer's currently installed products, but also the lifecycle history and effective-time context that Revenue Cloud uses to process downstream amendments and renewals. The Asset record represents what the customer owns or is entitled to. Asset Action records capture the commercial lifecycle events that created or changed that asset, such as an initial sale, amendment, renewal, cancellation, or quantity change. Asset State Period records retain the time-bounded states of the asset, allowing Revenue Cloud to determine what configuration, quantity, and commercial terms were effective at a particular point in time. Asset Action Source provides traceability to the source transaction or originating record behind an asset action. Discovering the data model, identifiers, relationships, effective dates, and historical action/state records for all four objects is therefore essential to mapping the legacy install base accurately and ensuring that future lifecycle transactions operate against the correct asset history. Salesforce object-reference documentation describes the asset lifecycle objects and their relationships: Asset Object Reference and Asset Action Object Reference.