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AP-213

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Question: 1

UC is implementing Advanced Account Forecasting for its national business. UC has three primary product materials it wants to forecast for each of its key distribution partners. Each of UC's individual products has one of these material attributes on its record, but UC doesn't need to see the product detail in its forecast.
What should the administrator do to meet these business requirements?

A. Add custom Material dimension to Forecast Fact and Forecast Set. Update the DPE definitions to aggregate the data at the distribution partner level.
B. Configure a custom Forecast Context. Create new DPE definitions from scratch.
C. Add custom Material dimension to Forecast Fact and Forecast Set. Clone and use the standard Data Processing Engine (DPE) definitions to populate the new custom metrics.

Answer: C

Explanation:
Advanced Account Forecasting is designed to support business-specific forecast dimensions without requiring the organization to expose unnecessary product-level detail. Salesforce defines a dimension as an attribute used to categorize forecast data. For a new Material dimension, the administrator extends the forecast fact structure with the appropriate field, defines that field as a dimension source, and includes the dimension in the applicable forecast set.
The preferred implementation pattern is to leverage Salesforce-provided Data Processing Engine templates rather than develop the complete processing model from the ground up. Salesforce specifically documents that the standard DPE templates can be cloned and customized to accommodate additional dimensions and measures. The cloned definitions can then aggregate source data into the Advanced Account Forecast Fact records according to the required dimensional structure.
A custom forecast context is unnecessary because the distribution partner remains the forecast context; Material is the additional grouping dimension.
This structure keeps the forecast concise for business users while preserving the material-level segmentation required for planning and reporting.
Study Guide references/topics: Configure and Build — Advanced Account Forecasting; Forecast Sets; Custom Dimensions; Data Processing Engine customization.

Question: 2

An organization is looking to support channel partners but has yet to onboard them digitally. The organization would like to work closely with its partners to plan their work and support them by providing functionality, insights, and dat
a. What should the organization do to fill this gap?

A. Leveraging Partner Visit Management functionality
B. Add a timeline to the Experience Cloud
C. Allow them to submit claims against warranty coverage

Answer: A

Explanation:
Partner Visit Management is specifically designed to improve structured engagement between manufacturers, distributors, and channel partners. It enables sales managers to schedule partner visits, assign field representatives, define repeatable activities, associate action plans, and capture performance metrics during those visits. This provides a formal operational framework for manufacturers to plan partner-facing work rather than simply exposing isolated information through a portal.
Salesforce also supports contextual visit tasks and Generic Visit Key Performance Indicators, allowing expected values to be compared with actual performance. Field representatives can perform assigned tasks, record observations, capture metrics, and access relevant partner information from the mobile Partner Visits experience. This directly addresses the requirement to collaborate more closely with partners while providing actionable functionality, insights, and data.
Adding a timeline to Experience Cloud provides visibility but does not establish a partner-work-planning framework. Warranty claim submission addresses a specific after-sales process rather than general channel-partner collaboration.
It also creates a repeatable engagement model that can be measured and improved over time across the partner network.
Study Guide references/topics: Configure and Build — Partner Engagement; Partner Visit Management; Action Plans; Generic Visit KPIs.

Question: 3

Universal Containers is interested in using Manufacturing Cloud. During discovery the business analyst identifies the following requirements:
UC needs the ability to set quantity and revenue Targets at the manager level, and the manager needs the ability to distribute that across each member of their team and their teams accounts
UC needs the ability to visualize the targets compared to the actual order amounts for the accounts with targets.
UC needs the ability to forecast its sales on a rolling 12-month basis using a combination of data from opportunities, long-term agreements, past orders, and market data that is uploaded periodically.
Which combination of Manufacturing Cloud features addresses the requirements above?

A. Account Manager Targets, Sales Agreements, Advanced Account Forecasting
B. Account Manager Targets, Advanced Account Forecasting, CRM Analytics for Manufacturing App
C. Account Manager Targets, Account Based Forecasting, CRM Analytics for Manufacturing App

Answer: A

Explanation:
The requirements map to three complementary Manufacturing capabilities. Account Manager Targets provides the hierarchical target-management framework. Managers can create revenue, quantity, or other targets, allocate portions to immediate team members, and subsequently distribute those assignments by account, product, and period.
Sales Agreements represent long-term or run-rate customer commitments and maintain planned and actual quantities and revenues across agreement schedules. Actual values can be derived from qualifying orders, providing the operational realization information needed when evaluating performance against planned business.
Advanced Account Forecasting addresses the multi-source rolling forecast requirement. Salesforce describes it as a comprehensive forecasting framework capable of using opportunities, orders, sales agreements, historical information, and additional business data, with configurable dimensions, measures, formulas, period groups, and DPE processing.
Together, these capabilities cover organizational target distribution, long-term agreement realization, and extensible multi-source forecasting.
Each feature addresses a different layer of the requirement, so substituting one for another would leave a gap in target management, agreement realization, or rolling forecast generation.
Study Guide references/topics: Design — Mapping Business Requirements; Account Manager Targets; Sales Agreements; Advanced Account Forecasting.

Question: 4

Universal Containers is using Account Based Forecasting and expects a 5% increase in the market but has a target growth of 10%.
Where should the Account owner add the additional 5%?

A. Update the Account Forecast to 10%.
B. Set 5% value in Account Growth.
C. Update the Market Growth to 10%.

Answer: B

Explanation:
Account Forecasting distinguishes between Market Growth Percentage and Account Growth Percentage because they represent different forecast drivers. Market growth represents the expected change in the broader market for the relevant products, whereas account growth represents the growth expectation attributable to the specific customer account. Salesforce

allows both percentages to be supplied when forecasts are generated and subsequently modified during permitted adjustment periods.
In this scenario, the market itself is expected to grow by 5%, so that value belongs in Market Growth. UC's total growth objective is 10%, meaning the remaining 5% represents account-specific incremental growth above the general market expectation. Therefore, the account owner should enter the additional 5% in Account Growth.
Changing Market Growth to 10% would incorrectly represent the external market expectation. Directly replacing the overall account forecast with 10% would also bypass the intended forecasting model in which the administrator's formulas can use the individual growth inputs when forecasts are recalculated.
Study Guide references/topics: Configure and Build — Account Forecasting; Growth Metrics; Forecast Formula Configuration; Forecast Recalculation.

Question: 5

A custom metric for display on Agreement Terms is needed based on the business requirements. Custom fields and mappings are required between the custom fields of the Sales Agreement Product and Sales Agreement Product Schedule objects.
What should an administrator consider while designing for this requirement?

A. Only number, percent, and currency field types are available for mapping.
B. Only number, formula, and value field types are available for mapping.
C. Only number, currency, and formula field types are available for mapping.

Answer: C

Explanation:
Sales Agreement custom metrics are implemented through corresponding fields on the Sales Agreement Product and Sales Agreement Product Schedule objects. Salesforce specifies that custom metric fields used in this mapping must use supported quantitative data types. For Sales Agreement Product Schedule, the supported custom field types available for mapping are Number, Currency, and Formula.
The administrator first creates the required field on both objects and then configures the field mapping from Sales Agreement Product to Sales Agreement Product Schedule in Manufacturing setup. If aggregation is required, a Roll-Up Summary field can also be used on Sales Agreement Product to summarize the corresponding Number or Currency values from schedule records. Once mapped, the metric can be added to a metric group so that account managers can work with it directly in the Agreement Terms table.
Percent and “value” are not the supported mapping types identified by Salesforce for this configuration. Formula fields are supported, which is important when the metric must be derived rather than directly entered.
Study Guide references/topics: Configure and Build — Sales Agreements; Custom Metrics; Agreement Terms; Sales Agreement Product and Product Schedule field mappings.

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