

Salesforce Arch-301

Salesforce Certified B2B Solution Architect

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Question: 1

Universal Containers uses the Salesforce Platform to track customer payments and any late payments. This is accomplished with an architecture that includes Marketing Cloud, Service Cloud, and an integration to the back-office billing system via MuleSoft. Invoices and payments are mastered in the billing system and exposed to Salesforce via MuleSoft. Notifications about customer payments are orchestrated out of Salesforce and emails are sent via Marketing Cloud. The late payment invoice data is required for service representatives to be able to reference within Salesforce.

What should the Solution Architect recommend when determining the role of each system for a use case of sending payment reminders?

- A. Integrate the billing system directly with Marketing Cloud via MuleSoft to trigger based on events from the billing system.
- B. Create cases within Salesforce from the billing system based on payment statuses with MuleSoft event orchestration and send payment notifications via Marketing Cloud.
- C. Recommend a trigger from the billing system into Marketing Cloud, which sends customer formatted emails.
- D. Load the payment and invoicing data within Salesforce from the billing system with MuleSoft, and drive payment notifications via Marketing Cloud.

Answer: B

Explanation:

Creating cases in Salesforce for late payments allows service representatives to have all the necessary information within their primary work environment. Orchestrating these events with MuleSoft and then using Marketing Cloud for communication ensures a seamless flow of information and allows for the leveraging of each system's strengths: Salesforce for case management and Marketing Cloud for customer communication. This strategy aligns with the recommended practices for system integration and event-driven architectures in Salesforce ecosystems.

Question: 2

Universal Containers (UC) currently has Sales Cloud for its direct Sales team and is about to implement Revenue Cloud for them as well. UC is also bringing in Experience Cloud for its indirect Sales team which will integrate with Sales Cloud and Revenue Cloud. The CIO would like to make sure they are working from a single operating model when it comes to defining their cross-departmental process and data utilization. The CIO wants to make sure there is no

duplication of any data or processes that will require data hygiene constantly because of duplicative efforts.

What are the two initial questions a Solution Architect should ask the business in order to select the right operating model for business process standardization?

Choose 2 answers

- A. Can the direct Sales team use the standard functionality?
- B. How critical are the business processes?
- C. Are the processes the same for the direct Sales team and indirect Sales team?
- D. Is the data shared between the direct Sales team and indirect Sales team?

Answer: C, D

Explanation:

According to SOGAF Operating Models¹, an operating model has two dimensions: business process standardization and business process integration. Business process standardization refers to how similar or different are the processes across different units of an organization, such as direct and indirect sales teams. Business process integration refers to how much data is shared across different units of an organization, such as direct and indirect sales teams.

By asking these two questions, a Solution Architect can determine which of the four types of operating models (coordination, diversification, replication, or unification) best suits Universal Containers' needs for cross-departmental process and data utilization¹.

To select the right operating model, the Solution Architect should ask:

C) Are the processes the same for the direct Sales team and indirect Sales team? Understanding if the sales processes differ significantly between teams will influence the design of the operating model.

D) Is the data shared between the direct Sales team and indirect Sales team? Knowing how data is shared helps to determine the extent to which systems need to be integrated and whether data duplication can be avoided.

Question: 3

Universal Containers (UC) sells automotive spare parts through a large network of partner retail outlets. UC's business model relies on partners (retail outlets) reaching out to UC to get access to its product catalog, selecting the product(s) they require, and then making bulk purchases. The partners occasionally reach out to UC sales representatives for advice or clarifications regarding particular SKUs on an opportunity on which they are co-sellers.

UC wants to offer discounts to partners who make large purchases. Further, UC wants to provide its partners with reports detailing their sales, including reports that summarize sales by partner, to help UC classify its partners accordingly.

Which solution should a Solution Architect recommend to meet UC's requirements?

- A. Sales Cloud, B2B Commerce, and Partner Relationship Management
- B. Sales Cloud, B2B Commerce, and Customer Community
- C. Sales Cloud, Service Cloud, and Partner Relationship Management

D. Sales Cloud, Partner Relationship Management, and Einstein

Answer: A

Explanation:

Sales Cloud provides the CRM capabilities needed to track opportunities and sales processes, B2B Commerce provides the platform for partners to make bulk purchases, and Partner Relationship Management (PRM) enables the management of partner relationships, including offering discounts for large purchases and providing reports to partners. This integrated solution meets all of UC's requirements for sales, bulk purchasing, and partner management. Salesforce documentation supports the use of PRM alongside Sales Cloud and B2B Commerce for managing complex partner relationships and sales processes.

Question: 4

A Solution Architect is delivering a multi-cloud implementation to a client. A diagram is required to communicate the vision and strategy of the solution to the business executives and stakeholders at a high level without going into too much detailed technical information. Which type of architecture diagram should the Solution Architect use?

- A. Master Data Management (MDM) Diagram
- B. Reference Architecture Diagram
- C. LightningPlatform Architecture Diagram
- D. Solution Architecture Diagram

Answer: D

Explanation:

A Solution Architecture Diagram shows the high-level view of the solution components and how they relate to each other. It also shows the key business capabilities and objectives that the solution supports. It does not go into too much detail about the technical implementation or configuration of each component.

A Solution Architecture Diagram can help you communicate the vision and strategy of your multi-cloud solution to the business executives and stakeholders at a high level without overwhelming them with too much technical information.

Question: 5

Northern Trail Health has clients that have more than 10,000 employees. The company's Customer Service team handles requests from its client's employees directly and tracks various rebate programs per employee. Private information should not be shared with the Sales team and they should only see contacts that are relevant to the sales process.

Assuming that Sales and Service teams share certain contacts, in which two ways should a Solution Architect ensure optimal performance?

Choose 2 answers

- A. Use profiles and/or permission sets to give View All access to Customer Service on the Contact object.
- B. Set the Contact object to PublicRead Only so that the sharing rules do not bog down performance for sharing.
- C. Assign all contacts to Sales team members to ensure sharing is streamlined and hide private fields from them.
- D. For each Account, assign Sales Contacts to the Sales team and all the rest to a Customer Service representative assigned to the Account.

Answer: A, D

Explanation:

For optimal performance and data access control, the Solution Architect should:

A) Use profiles and/or permission sets to give View All access to Customer Service on the Contact object. This allows Customer Service to access the necessary contact information while maintaining the principle of least privilege.

D) For each Account, assign Sales Contacts to the Sales team and all the rest to a Customer Service representative assigned to the Account. This approach ensures that each team has access to the relevant contacts while keeping private information secure and maintaining system performance by minimizing complex sharing rules.

Salesforce's documentation on sharing and visibility best practices recommends such strategies to manage access to records efficiently and securely.

<https://trailhead.salesforce.com/en/credentials/sharingandvisibilityarchitect>

Question: 6

A Solution Architect is working with a complex enterprise architecture that supports multiple business processes. Many previous transformation projects have struggled because of the interdependencies between the Salesforce production environment and other systems, as well as a lack of documentation.

In which two ways can a Solution Architect gain a better understanding of the current state of the Salesforce production environment?

Choose 2 answers

- A. Speak to the business stakeholders to gather their suggestions for improvement.
- B. Identify which system integrator did the previous implementation and ask them to document their work.
- C. Examine the details of the current configuration to see how it is set up.
- D. Work with the system administrator to identify who has the most knowledge of the current configuration.

Answer: C, D

Explanation:

Examine the details of the current configuration to see how it is set up². This way, you can get a clear picture of what features and functionalities are being used, how they are configured, and how they support the business processes. You can also identify any technical debt, customizations, or integrations that may impact performance or scalability.

Work with the system administrator to identify who has the most knowledge of the current configuration². This way, you can leverage their expertise and experience to understand how the system works and why it was designed that way. You can also get their feedback on any issues or challenges they face with maintaining or updating the system.

<https://trailhead.salesforce.com/credentials/b2bsolutionarchitect>

Question: 7

Universal Containers (UC) is currently utilizing Salesforce Revenue Cloud, Service Cloud, and Field Service for its internal Sales teams, call center, and field service teams. The field service team has asked for new data visibility around Sales and Service data because customers in the field will often ask about sales orders that typically exist within Revenue Cloud.

What is an immediate consideration a Solution Architect should provide regarding giving this kind of data access?

- A. Generate a new permission set that grants access to the Order object and assign it to the field service users.
- B. Generate a new profile that grants access to the Order object and assign it to the field service users.
- C. Provide the field service team with CPQ licenses to view Order data.
- D. Provide the field service team with a Sales Cloud license to view Order data.

Answer: A

Explanation:

Creating a permission set that grants field service users access to the Order object is a granular and secure way to provide the necessary data visibility. This allows for precise control over which users have access to order data without impacting other profiles or requiring additional licenses. Salesforce's permission set documentation provides guidelines on how to grant specific access rights to users, ensuring they have the information needed to perform their job functions effectively.

Question: 8

3D Scanners needs to apply a discount automatically on the Quote Line for Distributors while in the Quote Line Editor. The percentage discount applied depends on attributes of the Distributor Account and that of the specific Product. Sales users can add additional discounts; however, those will need to go through an approval process that allows for resubmitting to only those that previously rejected the additional discount.

Which two options should a Solution Architect recommend to meet the requirements while keeping the user experience in mind?

Choose 2 answers

- A. CPQ license
- B. Flow
- C. Price Rules
- D. CPQ Plus license

Answer: A, C

Explanation:

CPQ license². This way, you can use Salesforce CPQ (Configure Price Quote) to automate complex quoting processes and apply discounts based on product and account attributes. You can also use CPQ approval rules to trigger approval requests for additional discounts and resubmit them to previous approvers.

Price Rules². This way, you can use CPQ price rules to calculate discounts automatically on quote lines based on conditions and formulas. You can also use price actions to update quote line fields with discount values.

Question: 9

UniversalContainers (UC) needs to support its customers via email, phone, and chat. Service agents are only scheduled to support one communication channel for each shift. UC has implemented a service-focused community but only wants customers to inquire about service in the community through chat.

Which three options should a Solution Architect recommend to meet the requirements defined above?

Choose 3 answers

- A. CTI adaptor with Omni-Channel integration
- B. Customer Community with ability to create a new support Case
- C. Experience Cloud, web-to-case, and a CTI integration
- D. Omni-Channel with defined presence, routing configurations, and Service Channels
- E. Customer Community with Live Agent

Answer: C, D, E

Explanation:

Experience Cloud². This way, you can create a service-focused community for your customers using Experience Cloud Sites. You can also customize the look and feel of your community and integrate it with other Salesforce products and features.

Omni-Channel with defined presence, routing configurations, and Service Channels³. This way, you can manage your service agents' availability and workload across different communication channels such as email, phone, and chat. You can also use service channels to define which objects and records are routed to your agents using Omni-Channel.

Customer Community with Live Agent²³. This way, you can enable chat support for your customers in the community using Live Agent. You can also configure chat buttons, invitations, pre-chat forms, and other settings for Live Agent.

Question: 10

Universal Containers (UC) is about to complete an initial planning of a complex solution involving multiple customer personas. UC wants to ensure it has a comprehensive understanding of what kinds of business outcomes the customers want to achieve before presenting them a solution.

Which method of discovery should a Solution Architect suggest to UC?

- A. Third-party research from well-known organizations
- B. Jobs To Be Done Framework
- C. Comprehensive Surveys to End Customers
- D. User Stories Creation with End Customers

Answer: B

Explanation:

The "Jobs To Be Done Framework" is a method that focuses on understanding customer needs in specific contexts and situations. This approach is ideal for UC to gain comprehensive insights into what kinds of business outcomes the customers want to achieve. It goes beyond mere feature requests and digs into the underlying goals and challenges customers face, which can be more enlightening for solution design than surveys or user story creation alone. The framework is recognized for its effectiveness in uncovering the real jobs customers are hiring products and services to do.

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