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QUESTIONS & ANSWERS  
**DEMO VERSION**  
*(LIMITED CONTENT)*

# Question 1

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Question Type: MultipleChoice

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In the Account Plan P&L key performance indicators (KPIs) Requirement, the design of the Latest Estimate KPI is all past periods and should show actual values, while current and all future periods should show planned values.

How should a consultant recommend building this in the KPI formula to determine past, current, and future weeks?

## Options:

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- A- Use an available calcHelper function.
- B- Use the standard Salesforce formula function PREVGROUPVAL.
- C- Use the existing planned values if actual values are 0.

## Answer:

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A

## Explanation:

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This requirement describes a 'Time-Phased' calculation, commonly referred to as 'Actualization' or 'Estimate to Complete' (ETC). The logic requires the system to dynamically switch the data source based on the current date: IF(Week < Current\_Week, Actuals, Plan).

The Calculation Engine (Processing Service) in Consumer Goods Cloud does not use standard Salesforce Formula syntax like PREVGROUPVAL (Option B), because it runs off-platform on a high-performance grid. Instead, it utilizes a JSON-based configuration model. To handle complex time-logic like 'Past vs. Future,' the platform provides specific calcHelper functions (Option A). These are pre-built logic handlers available within the KPI definition syntax that allow the consultant to compare the column index (time period) against the current period index. This ensures that the 'Latest Estimate' KPI automatically updates every week as time progresses, replacing 'Plan' with 'Actuals' without manual intervention.

# Question 2

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Question Type: MultipleChoice

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A consumer goods manufacturer wants to track spending against trade promotion tactics, but does not want to manage the creation of fund records or the financial transactions between funds.

What should a consultant advise?

### Options:

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A- The Funds module is optional in TPM so does not need to be implemented. Create a single fund per sales org with an initial value representing the total amount in the fund at sales org level to act as a dummy fund record so that Spend Tracking can be used. The system can prevent overspending but only in relation to the initial loaded values as subsequent transactions will not be held within the system.

B- Tracking spend requires implementation of the Fund Management module. Initial fund values can be loaded as initial transactions by dataloading into the appropriate fund records. Subsequent transactions do not need to be managed in the system. The system can prevent overspending but only in relation to the initial loaded values as subsequent transactions will not be held within the system.

C- The Funds module is optional in TPM so does not need to be implemented. Actual spend can still be compared to that defined in the Spend Planning card (SPC), but not against the initial or subsequent transactions used to define the available value of funds. The system will not be able to prevent overspending.

### Answer:

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A

### Explanation:

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In Salesforce Consumer Goods Cloud, the Funds Management module is indeed technically optional, but it is deeply integrated into the Tactic Spend calculation logic. The system's calculation engine typically requires a 'Source' to attribute spend against, even if the user does not want to do complex checkbook management (deposits, withdrawals, transfers).

Option A describes the standard workaround for this 'Lightweight Funds' requirement.

**The Dummy Fund:** By creating a single, high-level fund for the Sales Org, you provide the necessary technical anchor for the system to record 'Spend.' This satisfies the data model requirement that every tactic spend must be associated with a funding source.

**Spend Tracking:** This setup allows the manufacturer to see 'Total Planned Spend' accumulating against this dummy bucket.

**Limitations:** Since the client refuses to manage transactions (adding money to the fund), the system can only check overspending against the initial loaded value. It cannot support dynamic accruals or complex validations, but it fulfills the core requirement of 'tracking spend' without the operational overhead of full fund management<sup>1</sup>.

# Question 3

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Question Type: MultipleChoice

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A key account manager (KAM) needs to plan promotions for a sports event at the beginning of the planning year. The customer fund does not hold enough money.

Which Consumer Goods Cloud settings allow the KAM to overspend the customer fund?

## Options:

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- A- Fixed Overdraw % and RBF Overdraw % setting on the transaction template
- B- Fixed Overdraw % and RBF Overdraw % setting on the fund template
- C- Fixed Overdraw % and RBF Overdraw % setting on the account extension

## Answer:

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B

## Explanation:

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In Consumer Goods Cloud TPM, funds are governed by Fund Templates. These templates define the rules of engagement for the budget, including strictness on spending limits.

The scenario describes a situation where a KAM needs to overspend (go into a negative balance) because the fund doesn't yet have enough money (common at the start of the year before rate-based accruals have built up)10.

To permit this, the administrator must configure the Overdraw settings on the Fund Template11:

Fixed Overdraw %: Defines how much a fixed fund can be overspent.

RBF Overdraw %: Defines how much a Rate-Based Fund (RBF) can be overspent.

If these are set to 0%, the system will block the promotion. By adjusting these percentages on the Fund Template (Option B), the system allows the KAM to approve the promotion even with insufficient current funds, assuming the deficit will be covered by future sales accruals. Option A is incorrect as transaction templates define the movement of money, not the balance limits. Option C is incorrect as Account Extensions hold customer attributes, not fund rules.

## Question 4

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Question Type: MultipleChoice

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Cloud Kicks wants to optimize the allocation of promotion spend for its key account managers (KAMs) on a customer account basis.

Which business stakeholders should a consultant prioritize speaking with when taking a top down approach to begin their discovery process to gather these requirements?

### Options:

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- A- KAMs and demand planners
- B- Sales managers and KAMs
- C- Sales managers and finance managers

### Answer:

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C

### Explanation:

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The key phrase in this requirement is 'top down approach'. This implies starting with the strategic decision-makers who determine the overall budget and its distribution, rather than the execution level.

Finance Managers: They are the custodians of the overall trade budget. They define the financial guardrails, profit targets, and total available funds for the fiscal year.

Sales Managers: They receive the budget from Finance and are responsible for allocating it to their respective territories and KAMs. They decide that 'Region A gets \$1M' and 'Region B gets \$2M.'

Speaking with KAMs (Option A/B) represents a bottom-up approach, as they are the recipients and users of the funds, not the allocators. Therefore, to understand the 'allocation optimization' from the top, the consultant must prioritize Sales Managers and Finance Managers.

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## Question 5

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Question Type: MultipleChoice

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Which technology should a consultant primarily leverage to enable the centralized repository of comprehensive stock keeping unit (SKU) information, including specifications, images, and attributes?

### Options:

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- A- Enterprise Resource Planning (ERP) systems
- B- Product Information Management (PIM) systems
- C- Data lakes

### Answer:

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B

### Explanation:

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The question specifies the need for a repository of comprehensive SKU information, explicitly mentioning specifications, images, and attributes<sup>6</sup>.

ERP (Option A): Primarily handles transactional data (Price, Cost, Inventory Count, SKU Code). It is generally poor at storing rich media like high-resolution images or marketing descriptions.

PIM (Option B): A Product Information Management system is purpose-built to centralize and enrich product data. It manages the marketing-facing attributes (images, long descriptions, nutritional info, dimensions) that are essential for catalogs and digital displays<sup>7</sup>.

Data Lake (Option C): While it can store raw data, it lacks the structured governance and syndication workflows of a PIM.

For a TPM implementation that requires rich product displays for the KAMs (e.g., seeing the product image on the promotion card), the consultant should look to integrate with the client's PIM system.

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## Question 6

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Question Type: MultipleChoice

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A large enterprise customer has decided to implement Consumer Goods Cloud TPM. The current landscape includes an Enterprise Resource Planning (ERP) solution that is responsible for Customer Master Data, Product Master Data, customer invoicing, and order fulfillment. The large enterprise customer needs its key account managers (KAMs) to use Consumer Goods Cloud TPM to view customers and products and manage assortments and promotions.

Which system should be the system of record going forward for customers and products?

### Options:

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- A- Salesforce Data Cloud
- B- Consumer Goods Cloud TPM
- C- Enterprise Resource Planning

**Answer:**

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C

**Explanation:**

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In a standard enterprise architecture for CPG companies, the Enterprise Resource Planning (ERP) system 3 remains the single source of truth (System of Record) for Master Data (Customers and Products).

Role of ERP:It handles the financial and logistical execution---invoicing, shipping, and fulfillment. If the product code or customer billing address is incorrect in the ERP, orders cannot be processed.

Role of TPM:Consumer Goods Cloud TPM is a consumption system for this master data. It imports Customers and Products from the ERP so that KAMs can plan promotions against them4.

A consultant must recommend maintaining the ERP as the system of record5. Trying to master this data in Salesforce (Option B) or Data Cloud (Option A) creates synchronization risks where the 'Plan' in Salesforce refers to a product that doesn't exist or is priced differently in the 'Execution' system (ERP), leading to failed orders and financial discrepancies.

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## Question 7

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**Question Type:** MultipleChoice

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Cloud Kicks wants to optimize the allocation of promotion spend for its key account managers (KAMs) on a customer account basis.

In which capability area should a consultant begin their discovery process to identify these requirements?

**Options:**

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- A- Promotion Planning
- B- Strategic Planning
- C- Funds Management

## Answer:

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C

## Explanation:

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The requirement specifically focuses on the allocation of promotion spend<sup>1</sup>. In the Trade Promotion Management (TPM) architecture, the mechanism for defining, accruing, and distributing budgets to specific customers is the domain of Funds Management<sup>2</sup>.

While Strategic Planning sets high-level targets (e.g., 'Grow revenue by 10%'), it is the Funds Management module that operationalizes the financial resources required to achieve those targets. It handles the logic for:

Fund Types: Are budgets Fixed (lump sum) or Rate-Based (accrual from sales)?

Allocation: How is money moved from a Headquarters fund to a specific Customer fund?

Governance: Rules on who can spend what.

Therefore, to 'optimize the allocation,' the consultant must first analyze the current Funds Management processes (Option C) to understand how budgets are currently constructed and assigned to KAMs.

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## Question 8

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Question Type: MultipleChoice

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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

## Options:

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A- 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.

B- 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.

C- 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.

## Answer:

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A

## Explanation:

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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.

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