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QUESTIONS & ANSWERS
DEMO VERSION
(LIMITED CONTENT)

Question 1

Question Type: MultipleChoice

What is the most Scalable way to set the legal Entity on the Order Product and Order Product Consumption Schedule?

Options:

- A- Use a Work Flow
- B- Use a Custom Setting
- C- Use a Quote Calculator Plugin (QCP)
- D- Use a Flow that is triggered when the record is created and run before the record is saved

Answer:

D

Explanation:

Requirement:

Set Legal Entity on Order Product and OP Consumption Schedule in a scalable way.

Runs before insert, so no second update transaction is needed.

Scalable (bulk-safe, low CPU, no recursion).

Modern Salesforce best practice for field population.

Works consistently across:

Order Products

Usage/Consumption Schedules

Why D. Before-Save Flow is correct
Why not the others? Option

Why Incorrect

A . Workflow Rule

Deprecated, not scalable, cannot run before-save.

B . Custom Setting

Storage mechanism, not automation logic.

C . QCP

Only affects Quote stage, not Order Products or Consumption Schedules AFTER order creation.

Thus **D is the correct, scalable, and recommended pattern.

Question 2

Question Type: MultipleChoice

An order has 5 order products that bill monthly.

One of the order products require 2 months of charges to appear on the next invoice without modifying invoicing for the other order products.

What field will need to be used to accomplish this task?

Options:

- A- Override Next Billing Date
- B- Hold Billing - C. Target Date
- C- Bill Through Date Override
- D- Bill Now

Answer:

A

Explanation:

The requirement:

One Order Product must invoice 2 months of charges on the next invoice, without affecting the other 4 Order Products.

To do this, you must tell Billing to:

Skip 1 billing cycle

Jump ahead to a future billing date

Without impacting other Order Products

Without modifying invoicing schedule globally

The correct way is to set:

Override Next Billing Date This forces the next invoice line to include charges up to the new date, resulting in multiple periods billed together.

Why others are wrong:Option

Explanation

B --- Hold Billing

Pauses billing entirely; does NOT create multi-month invoices.

C --- Target Date

Controls invoice run date, not multi-period billing.

D --- Bill Through Date Override

Controls end date of a prorated period, not the number of periods billed.

E --- Bill Now

Generates an immediate invoice but still only bills 1 period unless dates are overridden.

Thus A (Override Next Billing Date) is correct.

Question 3

Question Type: MultipleChoice

What are three reasons why you would need an AppExchange Solution to support generating a Document in support

of a Revenue Cloud Project?

Options:

A- Contract Redlining

B- Watermarks

C- Invoice Generation

D- Electronic Signature

E- Attachments

Answer:

A, B, D

Explanation:

A Revenue Cloud project often requires enhanced document capabilities beyond native Salesforce CPQ or Billing.

A --- Contract Redlining Requires document collaboration, versioning, and clause-level redline---not native in CPQ.

AppExchange apps like Conga, Nintex, DocuSign CLM support this.

B --- Watermarks Not supported natively by CPQ Quote Templates or Billing invoice templates.

Requires 3rd-party document generation.

D --- Electronic Signature Salesforce does not provide native eSignature.

Common tools: DocuSign, Adobe Sign.

Why the wrong answers are incorrect: Option

Why Incorrect

C --- Invoice Generation

Salesforce Billing does generate invoices natively.

E --- Attachments

Salesforce Files/Attachments are natively supported; no AppExchange needed.

Question 4

Question Type: MultipleChoice

An Invoice Scheduler is set up with Target Date = January 15 and Bill Usage Charges False.

Which setting will generate invoice lines?

Options:

A- Order Products with Next Billing Date equal to or earlier than January 15

B- Usage Summaries with Next Billing Date equal to or earlier than January 15

C- Order Products with Next Billing Date equal to or after January 15

D- Order Products with Next Charge Date equal to or earlier January 15

Answer:

A

Explanation:

Invoice Scheduler Settings:

Target Date = Jan 15

Bill Usage Charges = FALSE

This means:

The scheduler will generate invoice lines for Order Products only, not usage summaries. Thus the correct rule is:

A --- Order Products with Next Billing Date equal to or earlier than January 15

Why the other options are wrong: Option

Why Incorrect

B --- Usage Summaries

Ignored because Bill Usage Charges = False.

C --- Next Billing Date equal to or after

Billing only generates lines for dates \leq Target Date.

D --- Next Charge Date

Not used by Invoice Scheduler.

Thus A is correct.

Question 5

Question Type: MultipleChoice

which three are key steps when documenting user stories?

Options:

A- Know which business process the requirement supports to categorize the user story

B- Identity the actor or personas in this user story

- C- Design the solution while the business process is being defined
- D- Document user acceptance test scripts for the user story.
- E- Identify the acceptance criteria or result for satisfying the user story.

Answer:

A, B, E

Explanation:

Salesforce user story best practices include:

- A -- Know the business process the story supports
- B -- Identify the actor/persona (Sales Rep, Billing Ops, Pricing Manager, etc.)
- E -- Identify acceptance criteria (must-have conditions for the story to be complete)

Incorrect options:

C Designing the solution before the business process is finalized violates Salesforce implementation methodology.

D Writing test scripts is UAT preparation, not part of writing user stories.

Question 6

Question Type: MultipleChoice

A Revenue Cloud customer has posted an invoice and now wants to add on more items from another order associated to that account. Without using invoice batches, how can this be accomplished?

Options:

- A- Credit the invoice, add the new order and run an invoice scheduler to pick all the orders up.
- B- use bill now on the new order and reparent the new invoice lines to the existing invoice C . Cancel and Rebill the invoice, add the new Order and run an invoice scheduler to pick all the order up.
- C- Use bill now on the new Order and consolidate the invoices.

Answer:

C

Question 7

Question Type: MultipleChoice

A user story for a Revenue Cloud implementation states. As an Accounts Receivable Manager, I want to automatically generate invoices in draft status the same day of every month. What implementation option should a revenue cloud consultant pursue first?

Options:

- A- Set up an invoice scheduler
- B- Triggers and apex to check the bill now checkbox after the order status is changed to "Activated".
- C- Workflow rule to check the bill now checkbox after the order status is changed to "Activated".
- D- Set up a Payment Scheduler

Answer:

D

Question 8

Question Type: MultipleChoice

An escalation on a Revenue Cloud Project happens, which role is primarily responsible for project success?

Options:

- A- Technical Architect
- B- Project Manager
- C- Customer Success Manager
- D- Developer
- E- Solution Architect

Answer:

B

Explanation:

When an escalation occurs on a Revenue Cloud implementation, the question is:

Who is ultimately responsible for the success of the project?

While many roles contribute, the Project Manager (PM) is the one accountable for:

Scope

Budget

Timeline

Risk & issue management

Cross-team coordination

Customer communication

Driving escalations and resolutions

Salesforce project methodology is clear:

The Project Manager owns overall project success.

Why the other roles are not the primary accountable party:Role

Why Not Responsible for Overall Success

Technical Architect

Owns technical integrity, not project success.

Solution Architect

Owns functional solution design, not delivery metrics.

Developer

Executes tasks, not responsible for project outcome.

Customer Success Manager

Supports customer relationship but not delivery execution.

Thus, the correct answer is:

B --- Project Manager

Question 9

Question Type: MultipleChoice

CPQ admin wants to improve the performance of Salesforce CPQ so that sales reps can quickly generate and send quotes. Which three steps can an admin take to improve the performance of CPQ?

Options:

- A- Product Rule evaluation event should be set to 'Always' to ensure product rule works in all scenarios
- B- Rules that have a narrower evaluation scope will lead to better performance
- C- Reuse referenced fields across the UI and rules
- D- Ensure users who want to create large quotes have the CPQ Plus license
- E- Ensure Salesforce CPQ is upgraded to the latest release

Answer:

B, C, E

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