



## Salesforce

AP-223 Exam

CPQ and Billing Consultant Accredited Professional

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## Question 1. (Single Select)

You are implementing the Design Document for a large Enterprise Revenue Cloud project having multiple lookup price rules supporting a complex pricing requirement in the Build phase. During construction the customer discovers additional logic and external data stores that need to be incorporated in order to achieve the correct pricing in a particular set of use cases. You estimate the lookup price rules will need to be modified, additional rules will need to be created and API development will be needed. As an Implementation consultant what is the appropriate course of action that should take in this predicament?

A: Communication to the customer ongoing adjustment can be made as long as we're in the build phase.

B: Implement the lookup price rules immediately then review with the solution Architect.

C: Communicate these changes to the project manager who will evaluate the impact to scope, timeline and budget then determine the next course of action

D: Consult with the solution Architect first who will expedite the updates to the design documents, then implement the changes immediately.

E: Gather more details, if it requires a low level of effort then implement immediately before starting the next sprint, Otherwise Complete on the subsequent sprint.

**Correct Answer: C**

### Explanation:

According to the Salesforce Revenue Cloud Implementation Guide, any changes to the design document during the build phase should be communicated to the project manager, who will assess the impact of the changes on the project scope, timeline, and budget. The project manager will then decide whether to accept, reject, or defer the changes, and update the project plan accordingly. This is the best practice to ensure that the project is delivered on time, on budget, and with the expected quality and functionality.

Implementing the lookup price rules immediately without consulting the project manager or the solution architect could result in errors, inconsistencies, or conflicts with the existing design or other components of the solution. It could also cause delays or rework if the changes are not aligned with the customer's expectations or requirements. Therefore, option B and option E are not appropriate.

Consulting with the solution architect first could help to expedite the updates to the design

document, but it would still require the approval of the project manager and the customer before implementing the changes. Therefore, option D is not sufficient.

Communication to the customer that ongoing adjustments can be made as long as we are in the build phase could create confusion or unrealistic expectations about the project scope and timeline. It could also undermine the credibility and authority of the project manager and the solution architect, who are responsible for managing the project and ensuring the quality of the solution. Therefore, option A is not advisable.

1: Salesforce Revenue Cloud Implementation Guide, page 17

2: Lookup Price Rule query considerations with Salesforce CPQ 3

### Question 2. (Multi Select)

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

A: Formula field data is not always available during CPQ quote calculation

B: Formula fields have unlimited access to object many relationships away which makes it 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 process automation can overwrite its value

**Correct Answer: A, C, D**

### Explanation:

Cross object formula fields are fields that reference data from related objects using lookup or master-detail relationships. They can be useful to display information from parent or child objects without creating custom code or workflows. However, using too many cross object formula fields in a Revenue Cloud project can pose some risks, such as:

Formula field data is not always available during CPQ quote calculation. This means that the formula fields may not reflect the latest values from the related objects when the quote is being

generated or updated. This can cause inaccurate pricing, discounts, or taxes. To avoid this, it is recommended to use CPQ fields or custom fields instead of cross object formula fields for quote calculation. 12

They are computationally expensive. This means that the formula fields require more processing power and time to evaluate and display the data from the related objects. This can affect the performance and responsiveness of the application, especially if there are multiple formula fields on the same object or page layout. To avoid this, it is recommended to limit the number and complexity of cross object formula fields, and use filters or conditions to reduce the number of records that need to be evaluated. 34

They can easily exceed limits if not carefully designed and tested. This means that the formula fields can cause errors or warnings if they exceed the maximum length, number, or level of relationships allowed by Salesforce. For example, a formula field can only reference up to 10 unique relationships and span up to five levels of relationships. If these limits are exceeded, the formula field will not save or display correctly. To avoid this, it is recommended to review the formula field limits and best practices, and test the formula fields in different scenarios and environments.

1: Lookup Price Rule query considerations with Salesforce CPQ [7]

2: Salesforce CPQ Quote Calculation Stages [8]

3: What Is a Cross-Object Formula? - Salesforce [9]

4: Tips for Reducing Formula Size and Complexity - Salesforce [10]

5: Formula Field Limits - Salesforce [11]

### Question 3. (Single Select)

How does Hold Billing work?

A: It Prevents invoice document generation and stops email notifications from going out to the customer.

B: The Hold Billing field is set to "yes" until the order is activated. Upon order activation the field will be automatically set to "no".

C: It suspends invoicing for that order product until the field is set to "no", Invoices lines will be

created to account for the time when hold billing was set to “yes”

D: It suspends invoicing for that order product until the field is set to “no”, Invoices lines will be created only for invoices after hold billing was set to “yes”.

**Correct Answer: C**

### **Explanation:**

Hold Billing is a feature of Salesforce Revenue Cloud that allows businesses to control when an order product is invoiced, based on certain criteria or events. By setting the Hold Billing field to Yes on an order product, the billing process is paused for that order product and all its usage summaries. This means that no invoice lines or invoice documents are generated for the order product until the hold is released. The hold can be released by setting the Hold Billing field to No or null, either manually or automatically through a workflow or trigger. When the hold is released, Salesforce Billing will create an invoice as soon as possible, and include all the invoice lines that were accumulated during the hold period. This ensures that the customer is billed for the full amount of the order product, regardless of the hold duration. For example, if an order product has a monthly billing frequency and a hold billing period of two months, the first invoice after the hold will include three invoice lines: one for the current month and two for the previous months when the hold was active. Reference:

[https://help.salesforce.com/s/articleView?id=sf.blng\\_hold\\_billing.htm&language=en\\_US&type=5](https://help.salesforce.com/s/articleView?id=sf.blng_hold_billing.htm&language=en_US&type=5)

<https://trailhead.salesforce.com/users/officialblaze/trailmixes/revenue-cloud-get-started-with-billing>

### **Question 4. (Single Select)**

How can a Revenue Cloud Consultant create a new payment Method for a credit card that will be saved for future Payments?

A: Enter the credit card details into a new payment Method record Click the Tokenize button

B: From the Payment credit cards related list, click the new credit card button.

C: Enter the credit card details into a new payment method record. Salesforce users should use platform encryption for PCI Compliance.

D: From the Account, Payment Method related list, then click the new Payment Method Credit Card button.

**Correct Answer: D**

**Explanation:**

To create a new payment method for a credit card that will be saved for future payments, the Revenue Cloud Consultant should follow these steps:

Navigate to the account record that needs the new payment method.

Find the Payment Methods related list, and then click New Payment Method Credit Card. This button opens a form that allows entering the credit card details, such as card number, expiration date, cardholder name, and billing address.

Optionally, select a payment gateway record to associate the payment method with a specific gateway. If no payment gateway is selected, the default gateway for the org is used.

Optionally, select the Autopay checkbox to make this payment method the default one for all transactions on this account.

Click Save. This action creates a new payment method record and also sends a request to the payment gateway to tokenize the credit card information. Tokenization is a process that replaces sensitive data with a unique identifier that can be used for payment processing without exposing the original data.

Once the payment gateway returns a token, the payment method record is updated with the token value in the Payment Gateway Token field. This token is used to process payments with this payment method in the future.

Create a Credit Card Payment Method

Payment Methods

Payments and Credits

**Question 5. (Single Select)**

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?

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

**Correct Answer: A**

### **Explanation:**

An invoice scheduler is a feature of Salesforce Revenue Cloud that allows you to automate the creation of invoices based on predefined criteria and schedules. An invoice scheduler uses an invoice run to evaluate whether and when an order product gets invoiced. You can set up an invoice scheduler to run daily, weekly, monthly, or once, and specify the target date and time, the invoice date, and the invoice batches to include. You can also choose to automatically post the generated invoices or review them in draft status before posting. An invoice scheduler is the best option to fulfill the user story, as it can generate invoices in draft status the same day of every month without requiring any manual intervention or custom code. 12

Triggers and apex are not the best option, as they require writing and maintaining custom code, which can be complex and error-prone. They also do not provide the flexibility and control of an invoice scheduler, as they can only check the bill now checkbox after the order status is changed to "Activated", which may not match the desired invoicing schedule or criteria. 3

Workflow rules are also not the best option, as they have similar limitations as triggers and apex. They can only check the bill now checkbox after the order status is changed to "Activated", and they cannot specify the invoice date, time, or batches. Workflow rules also have some restrictions and considerations, such as the number of actions per rule, the order of execution, and their impact on performance. 4

Setting up a payment scheduler is not relevant to the user story, as it is a feature of Salesforce Revenue Cloud that allows you to automate the collection of payments from customers based on predefined criteria and schedules. A payment scheduler does not create invoices, but rather applies payments to existing invoices or payment allocations. [5]

1: Invoice Schedulers for Automating Invoice Creation - Salesforce

2: Invoice Scheduler | Salesforce Subscription Management | Salesforce Developers

3: Use Invoice Scheduler to Generate Invoices - Salesforce

4: Workflow Rules Considerations - Salesforce

[5]: Payment Schedulers for Automating Payment Collection - Salesforce



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