



Oracle

Exam 1z0-527

Oracle CRM On Demand Essentials

Version: 6.3

[Total Questions: 148]

Question No : 1

You have a requirement to set up an Expenses object. This object will be used often by marketing and sales users and you need to create a set of lists to appear on their Expenses home pages. The marketing users will want lists that search on an Expense Category pick list field and the sales users will want lists that search on an Expense Date field. You decided you will use a Custom Object for the Expenses object. What recommended best practice should you keep in mind when setting up the fields for the new Expenses object?

- A. Create a new Expense Date field with a Field Type of Date/Time so that your lists can query correctly for different locales.
- B. Select the Required check boxes at the field level for both the Expense Date and Expense Category fields so all users have to fill in these values.
- C. Rename indexed fields to use for the Expense Date and Expense Category fields so your lists run faster.
- D. Deselect the copy enabled check box for the expense date and expense category fields so your lists run faster.

Answer: C

Explanation: Two indexes, one for the Expense Data field and one for the Expense Category field, will make both type of searches faster.

Question No : 2

Once a forecast is set up, it typically does not need to be updated unless certain events take place which two events may require an update of the forecast definition?

- A. Creating a new forecast report In Analytics
- B. Creating a new access profile for a role including in the forecast
- C. Deactivating employees with the roles Included In the forecast
- D. Changing the expiration date of the forecast alert message
- E. Changing the reporting structure

Answer: C,E

Explanation: You must update your forecast definition settings after you make the following changes to user records:

Changing the name in the Reports To field in a participant's user details.

* Deactivating users who are participants in the forecast hierarchy. (C)

* Adding or removing employees from the roles included in the forecast. (implies E)

Reference: Oracle CRM On Demand Online Help, Setting Up Forecast Definition

Question No : 3

A company wants to implement a policy that employees should only use the CRM on Demand application when they are in the company office. What is the best way to implement this policy in the application?

- A. Navigate to the Company Profile page and change the company Authentication Type to Single-Sign on Only.
- B. Monitor the Sign-In Audit to identify users that do not conform to the policy and Inactivate their user credentials.
- C. Use the Company Administration > Security Settings page to enter the specific IP address ranges for the company network.
- D. Change the sign-in page for user authentications to a page behind the company firewall.

Answer: C

Explanation: The Restricting Use to IP Addresses feature allows your company to restrict access to the system to specific IP address ranges. You can use this feature to ensure that your users only access the system from specific network locations, such as your office. If this feature is enabled, your users can only sign in to the application from machines that have IP addresses within the range you specified.

Question No : 4

You created an Account Assignment Rule and added users to the Team Assignment section on the Rule Detail page. When the rule is triggered and an Account record is assigned, which two actions occur?

- A. All users on the team are given the same access level as the assigned record owner to the Account, and Its related Contact and Opportunity records.
- B. All users on the team are also assigned to the territory specified in the Assign To Territory field for the rule.

- C. Unless you selected the Include Team Assignment check box for the rule, no users are assigned to the team.
- D. Only the users that meet the rule criteria are assigned to the team.
- E. Each user on the team is given the specified access level to the Account, and its related Contact and Opportunity records.

Answer: C,E

Explanation: C: Field "Include Team Assignment"

Description: "If the rule criteria are met, the team members are assigned to the account."

Reference: Oracle CRM On Demand Online Help, To set up assignment rules

Question No : 5

One of the Service Coordinators in your department is not receiving emails when new service requests are assigned to her. The system administrator that built the service request assignment rules is on vacation so you are helping troubleshoot this issue. What is the most likely cause of this issue?

- A. The Email Notification workflow action is inactive.
- B. The Service Request record in question is missing Information in key fields.
- C. The workflow responsible for the assignment is inactive.
- D. The email notifications are sent to the user's manager.
- E. The Send Email Notification check box is not selected for the assignment rule.

Answer: E

Explanation: When a lead or service request is assigned an owner, an email is sent to the new owner. You can turn off email notification for Service Requests on a per-rule basis by clearing the Send Email Notification check box (flag) on the Service Request Assignment Rule Edit page.

Reference: Oracle CRM On Demand Online Help

Question No : 6

Your company's Sales department is contemplating the use of a custom object to track

information related to a new record type called "Orders". As the system administrator, you're responsible for making sure that the Sales department is aware of the limitations associated with the use of custom objects.

Select two application areas not compatible with custom objects.

- A. Analytics
- B. Forecasting
- C. Books of Business
- D. Assignment Manager
- E. Web Services

Answer: B,D

Explanation: Note 1: New custom objects in Oracle CRM On Demand Release 16 leverage the same powerful capabilities as pre-built objects, including real-time reporting for accurate analysis (not A) of data and related information, fields customization, external data integration, page and related item layouts management, role security settings, list management, as well as the ability to load objects from other systems or files via web services (not E) or import/export utilities.

Reference: Oracle CRM On Demand Online Help

Question No : 7

What is the first step in customizing a layout for the Account Lookup Window?

- A. Navigate to the Account Search Layout1
- B. Click the My Setup link
- C. Navigate to the Layout Wizard for Related Lists
- D. Navigate to the Page Layout Wizard

Answer: D

Explanation: See step 1-5 below.

To create a page layout

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the Page Layout section, click the required Page Layout link.

5 In the Page Layout list, do one of the following:

- *Click the Edit link for an existing layout to modify it.
- * Click the New Layout button to create a new layout.
- * Click the Copy link to copy an existing layout.

The Page Layout Wizard appears to guide you through the process.

Reference: Oracle CRM On Demand Online Help, To create a page layout

Question No : 8

Your company uses a custom list of Industries to classify your accounts, but the CRM Industry field type is set to pick list (read only) on the Account Field Setup page. You need to have the custom Industry names appear in the Industry field pick list on the Account detail page. As the Administrator, how do you resolve this issue?

- A. Add a new Industry field and assign it the Pick list type; then edit the pick list
- B. Change the field type of the default Industry field to an editable pick list.
- C. Change the display name of an unused field with an editable pick list
- D. Go to Data Rules & Assignment and modify the Industry Definitions.

Answer: D

Explanation: To customize your company's industry list

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click the Data Rules & Assignment link.
- 3 In the Industry Definition section, click the Industry Definition link.
- 4 From the Translation Language drop-down list, select your company's primary language.
5. On the Industry Edit page, fill in the information.
- 6 To manually enter the translated equivalent of the new industry:
 - a From the Translation Language drop-down list, select the language.
 - b Enter the translated equivalent in the Display Name field and click Save.
- 7 Save the record.

Reference: Oracle CRM On Demand Online Help, To customize your company's industry list

Question No : 9

As a CRM administrator, you're evaluating different data sharing strategies to implement in your organization. Your main driver is to allow record owners to select which users to give access to their data. What piece of functionality best meets your requirement?

- A. Group Sharing
- B. Books of business
- C. Workflows
- D. Team Sharing

Answer: D

Explanation: For some record types, you can share a record so that a team of users can view it. The following record types can be shared by teams:

- * Account
- * Application
- * Business Plan
- * Contact
- * Custom Object 01, 02, and 03
- * Deal Registration
- * Household
- * MDF Request
- * Objective
- * Opportunity
- * Partner
- * Portfolio
- * Special Pricing Request

With account records, you can also share the contact and opportunity records that are linked to that account record.

To share a record, you first add the person to the Team for the selected record. Then you specify the access level the person has to the record.

Question No : 10

Select the true statement regarding book structure.

- A. Your book structure should closely reflect how your company organizes its data.
- B. Your book structure should always reflect your company's corporate hierarchy.
- C. Your book structure should reflect your company's geographical distribution.
- D. Your book structure should reflect Financial Cost Centers for financial reporting.

Answer: A

Explanation: To set up an efficient book structure, you must plan your book hierarchies carefully. Consider the following guidelines when you design and refine the book hierarchies for your company:

- * Do not create custom books that replicate user books.
- * Determine the organization and access policies for your business data. (related to A)
- * Determine whether the corporate structure is relevant to data management. (related to A)
- * Determine the data affiliations in your company. (related to A)
- * Design your books based on user needs, and consider the tasks where users most commonly use books.
- * Design your books so that the functionality provided by the Manager Visibility Enabled check box on the company profile is used as little as possible.
- * Keep the number of levels in your book hierarchies to a minimum.
- * As far as possible, reduce the amount of cross-listing in the book structure. Cross-listing is the practice of duplicating records across multiple books.
- * Use workflow rules to automate book management.

Reference: Oracle CRM On Demand Online Help, About Designing Book Structures

Question No : 11

By default, how is progress toward sales quota targets tracked in CRM on Demand?

- A. On the Pipeline Dashboard
- B. On the User Profile page
- C. On the Forecast Detail page
- D. On the Opportunity Detail page

Answer: B

Explanation:

This section describes the procedure for the administrator to set up a user's quotas.

To set up a user's quota

1 In the upper right corner of any page, click the Admin global link.

2 In the User Management and Access Controls section, click the User Management and Access Controls link.

3 On the User Management and Access Controls page, click the User Management link.

4 On the User List page, click the Last Name link for the user whose quota you want to set up.

5 On the User Detail page, scroll down to the Quotas section and do one of the following:
Click the New Quota button.

Click the Edit link for the quota you want to edit.

6 On the Edit Quota page, complete the fields.

Reference: Oracle CRM On Demand Online Help, Setting Up Users' Sales Quotas

Question No : 12

You have been asked to set up the sales quota information for the Individual sales reps in your region where is this information entered?

- A. The Forecast Definition page
- B. The Role Management wizard
- C. The Territory Details page
- D. The User Detail page
- E. The Opportunity Page Layout page

Answer: D

Explanation: Note: See step 5 below.

If sales representatives use Oracle CRM On Demand to manage their forecasts, their quotas must be set up. Sales representatives can set up their own quotas or, as an administrator, you can create quotas for them.

This section describes the procedure for the administrator to set up a user's quotas.

To set up a user's quota

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and

Access Controls link.

3. On the User Management and Access Controls page, click the User Management link.
4. On the User List page, click the Last Name link for the user whose quota you want to set up.
5. On the User Detail page, scroll down to the Quotas section and do one of the following:
 - * Click the New Quota button.
 - * Click the Edit link for the quota you want to edit.
6. On the Edit Quota page, complete the fields.
 - * To spread a yearly quota evenly over the fiscal year, enter the amount in the Total Quota field and click Spread.
 - * To add the monthly quotas together, enter an amount for each month and click Sum.
7. Save the record.

Reference: Oracle CRM On Demand Online Help, Setting Up Users' Sales Quotas

Question No : 13

Bill Williams is a manager of a sales team His role has the Can Read All Records setting enabled for Accounts. His role also gives him read only default access and Read/Edit owner access to accounts.

Jane Jones is a sales representative who reports to Bill Williams. Her role gives her Read only default access and Read/Edit/Delete owner access to accounts. Jane owns the ACE Industries account record in CRM on Demand. Manager Visibility is enabled.

Jane changes the owner on the ACE Industries account to Frank Ford, a sales representative who does not report to Bill Williams, but to a sales manager on another team. What kind of access does Bill Williams have to the ACE Industries Record?

- A. Read-Only
- B. Read/Edit/Delete
- C. Read/Edit
- D. Read/Create
- E. No access

Answer: C

Explanation: Delegated users gain the primary user's owner access to the records that the

primary user owns or has access to through teams or groups. Delegated users do not gain the primary user's default access to records.

In this scenario Jane has Read/Edit/Delete owner access. The delegated user (Frank) will get this access. However, Bill Williams will not get any permissions through Manager Visibility. He has only the Read/Edit owner access. Bill Williams will not get further permissions through Manager Visibility either. He is not the manager of Frank Ford.

Reference: Oracle CRM On Demand Online Help, About User Delegation

Question No : 14

Sales management wants sales representatives to only have access to a few of the prebuilt reports available in the application. You have been asked to make this subset of reports available to the users with the Sales Rep role. What is the best way to accomplish this?

- A.** Create a custom Reports Homepage layout and deselect the prebuilt reports that you do not want to appear on the page. Then, edit the role to associate the new layout.
- B.** Create a custom Web applet for the Reports Homepage to provide links to only those prebuilt reports that you want to expose for the role- Then, edit the role to give access to the Web applet,
- C.** Deselect the View Prebuilt Analyses privilege for the role. Open the prebuilt reports In Answers and save them In a Company Wide Shared folder. Then, give folder access to the role.
- D.** Rename a Custom Object to Reports and add the appropriate prebuilt reports as child objects. Then, remove access to the standard Reports tab for the role.

Answer: C

Explanation:

To hide specific shared prebuilt reports and display others, clear the Access Analytics Reports - View Prebuilt Analyses privilege. This hides all shared prebuilt reports. Then to share specific prebuilt reports, go to Oracle CRM On Demand Answers, open the report that you want to share, and save it in a shared folder within Company Wide Shared Folder. Configure the shared folder visibility as needed.

Reference: Oracle CRM On Demand Online Help, About Sharing and Hiding Prebuilt Reports

Question No : 15

You're helping your VP Sales decide how often Sales Reps should submit their forecast. What are the forecast frequency options in CRM on Demand?

- A. Weekly
- B. Bi-weekly
- C. Monthly
- D. Bi-monthly
- E. Quarterly

Answer: A,C

Explanation: In the Create Forecast Snapshot Each field, specify how frequently the forecast snapshot is to be created.

You can select weekly or monthly forecasts.

Reference: Oracle CRM On Demand Online Help, To set up or update forecast definition

Question No : 16

As a Regional Sales Manager, you would like to create a list of all Accounts you access on a daily basis. In the "Search In" drop-down list of the "New Account List" page, you select "All Records I own."

What records will be returned every time you run this list? Select the three correct answers.

- A. All records you own
- B. All records shared with you by the owner through the team feature
- C. All records you or your subordinates own
- D. All records where you or your subordinates are on the team
- E. All records shared with you through the group assignment feature

Answer: A,B,E

Explanation: For single record type searches. In the Search In section, select one of the following from the drop-down list.

*All records I can see. Includes records that you have at least View access to, as defined by your reporting hierarchy, the access level for your role, and the access level for shared records.

* All records I own.

Includes only records in the filtered list that:

/You own (A)

/Are shared with you by the owner through the Team feature (B)

/Are shared with you through the group assignment feature (for tasks, accounts, contacts, and opportunities) (E)

* All records where I am on the team.

* All records I or my subordinates own.

* All records where I or my subordinates are on the team

* My Default Book. Your default setting for the Book selector, as defined by your company administrator.

Reference: Oracle CRM On Demand Online Help, Using Advanced Search

Question No : 17

An account manager needs to be able to have Read only access to the Opportunity records created by the sales team, which are associated to his accounts. However, he reported that while he can see an Opportunity related Information section on his Account Detail page, he sees an Access Denied error instead of a list of Opportunity records. What is the likely problem?

- A. The Has Access role setting is not selected for Opportunity records.
- B. The default Access Profile does not have at least Read/Edit access for Opportunity related information.
- C. The Can Read All Records role setting is not selected for Opportunity records.
- D. The default Access Profile does not have Inherit Primary access for Opportunity related Information,
- E. The Can Read All Records role setting is not selected for Account records.

Answer: A

Explanation: To ensure that a user does not have access to opportunities linked to an account, you must ensure that the user is not given access through one or more of the following methods:

* The user does not have access to the opportunity records from the role settings. (applies

here. related to A).

- * The user is not on the opportunity team.
- * The user does not have a subordinate who is on the opportunity team.
- * The user has not been delegated by another user who has access to opportunities.
- * The opportunity is not in a book where the user is a member, or in any of its subbooks.
- * The access level of the record type for the account related opportunity is set to any option except the following: No Access or Inherit Primary.

Reference: Oracle CRM On Demand Online Help, About Opportunity Teams

Question No : 18

You have a requirement to set up an Expenses object. This object will be used often by marketing and sales users and you need to create a set of lists to appear on their Expenses home pages. The marketing users will want lists that search on an Expense Category pick list field and the sales users will want lists that search on an Expense Date field. You decided you will use a Custom Object for the Expenses object. What recommended best practice should you keep in mind when setting up the fields for the new Expenses object?

- A.** Create a new Expense Date field with a Field Type of Date/Time so that your lists can query correctly for different locales.
- B.** Select the Required check boxes at the field level for both the Expense Date and Expense Category fields so all users have to fill in these values.
- C.** Rename Indexed fields to use for the Expense Date and Expense Category fields so your lists run faster.
- D.** Deselect the Copy Enabled check box for the Expense Date and Expense Category fields so your lists run faster.

Answer: C

Explanation: Two indexes, one for the Expense Data field and one for the Expense Category field, will make both type of searches faster.

Question No : 19

Which two statements are true about Workflow rules?

- A. You can select only one record type, with up to three trigger events, for each Workflow rule.
- B. You can select only one record type and one trigger event for each Workflow rule.
- C. A Workflow rule must have a Condition so the appropriate records can be identified on which to execute the actions.
- D. Once you save a Workflow rule, you cannot change its record type, trigger event or condition.
- E. Once you save a Workflow rule, you cannot change its record type or trigger event, but you can change its condition.

Answer: B,E

Explanation: B: Each workflow rule relates to one record type only. The rule is evaluated for that type of record and the actions are performed on that type of record.

E: *After a rule is created, you cannot change the record type on the rule.

*The event that triggers the rule. When this event occurs on a record of the specified type, the rule is evaluated. After a rule is created, you cannot change the trigger event on the rule.

* If you want to define conditions on the workflow rule, click the fx icon in the Workflow Rule Condition section of the Workflow Rule Detail page and use the Siebel Query Language Expression Builder to define the workflow rule condition.

Reference: Oracle CRM On Demand Online Help, To create a workflow rule

Question No : 20

Sales managers want you to build a report that allows them to view revenue totals by product category and industry for each sales representative and select different years to filter the data. Which of the report views described below would best meet their needs?

- A. pie chart view with Owner selected for the chart and fiscal year selected for the legend.
- B. A pivot table view with Owner in the Sections section and Fiscal Year In the Pages

section.

C. A table views with Fiscal Year In the first column position and a filter on the owner column

D. Pivot table view with Fiscal Year in the Sections section and Owner in the Pages section.

E. A vertical bar chart view with Owner on the vertical axis and Fiscal Year on the horizontal axis.

Answer: B

Explanation: We should use a pivot table to be able to show aggregate data.

We should use Fiscal year in the Section section to be able to select different years to filter the data.

Note: The Pivot Table view is an interactive view that allows you to rotate the rows, columns, and section headings to obtain different perspectives of the data. Pivot tables are navigable and drillable, and are especially useful for trend reports.

Note on Pivot Sections: Provides initial filter criteria. For each value in the Section column, a unique pivot table appears, composed of the Columns, Rows, and Measures defined in the pivot table.

Reference: Oracle CRM On Demand Online Help, Showing Results in Pivot Tables

Question No : 21

Which two statements are true about audit trails?

A. The Record Type Auditable Fields setting in the Company Profile determines the total number of fields that can be audited across all record types.

B. The Record Type Auditable Fields setting in the Company Profile determines the number of fields that can be audited for each record type.

C. Audit trails are not available for any Custom Objects, only standard objects,

D. No custom fields can be audited, only standard fields.

E. Audit trails track these changes to a record: when the change was made, who made the change, the old and new values.

F. Audit trail data is automatically purged from the system every six months.

Answer: B,E

Explanation: B (not A): The total maximum number of audited fields allowed for your company across all record types is 30.

If you want to increase the maximum number of audited fields, edit the Max # of Auditable Fields in your company profile. The total number of audited fields available and the number of different record types available are displayed on the Audited Fields page.

E: * To view the audit trail for a service request

1 Select the service request.

2 On the Service Request Detail page, scroll down to the Audit Trail related information.

Each row shows the date the record was updated, who made the update, and the new and old values in the field.

* To view the audit trail for a fund

1 Select the fund.

2 On the Fund Detail page, scroll down to the Audit Trail section.

Each row shows the date the record is updated, who made the update, and the new and old values in the field.

* To view the audit trail for an opportunity

1 Select the opportunity.

2 On the Opportunity Detail page, scroll down to the Audit Trail related information.

Each row shows the date the record is updated, who made the update, and the new and old values in the field.

Reference: Oracle CRM On Demand Online Help

Question No : 22

Service managers want to see the number of open and closed service requests by product, owner, account, and industry. You determine that a dashboard would be the best option to represent this content. How would you begin creating a custom dashboard?

A. Click the Reports tab, and then click the Design Analyses link and the New Dashboard button.

B. Click the Reports tab, and then click the Manage Dashboards link and the New Dashboard button.

- C. Click the Dashboard tab, and then click the Manage Dashboards link and the New Dashboard button.
- D. Click the Dashboard tab, and then select a prebuilt dashboard and click the Edit link.
- E. Click the Reports tab, and then click the New Dashboard button.

Answer: C

Explanation:

If you want to create a new dashboard, see Creating Interactive Dashboards below:

To create an interactive dashboard

1. Click the Dashboard tab.
2. On the Dashboard page, click the Manage Dashboards link.
3. On the Manage Dashboards page, click New Dashboard.
- 4 On the Dashboards Edit page, enter the name and description for the dashboard, and then click Save.

The Manage Dashboards page is displayed again.

- 5 On the Manage Dashboards page, click the Design link for the dashboard that you created.

Reference: Oracle CRM On Demand Online Help, Creating Interactive Dashboards

Question No : 23

One of the Sales Representatives in your organization has just been re-assigned to a new territory under a different Regional Manager. What update should you make to her user profile to make sure that her new manager has access to her data?

- A. Update Business Unit Level 1-4 fields
- B. Update Status field
- C. Update Region field
- D. Update Reports To field
- E. Update Role field.

Answer: D

Explanation: A user's manager is determined by the Reports To field on the User Detail page.

Reference: Oracle CRM On Demand Online Help, Company Data Visibility Settings

Question No : 24

You need to figure out which method to use to load a large number of Account records Into CRM On demand. Which three of these conditions can be met by using the Data Loader to load your data?

- A. You want to schedule the data to load automatically during off hours.
- B. You need to load the records sequentially, so that Account 1 Is loaded before Account 2, and so on.
- C. You do not have a map file and want to create one.
- D. You have more than 100,000 Account records to load.
- E. You want to use On Demand Predefined Fields to check for duplicates when loading the data.
- F. You want to add new records, as well as update some existing records.

Answer: A,D,F

Explanation: A: the Data Loader command can be scheduled to run during off hours.

D: You can use the Data Loader to load huge amount of data

F: The Data Loader can add and update records. See note below.

Note:

The Oracle Data Loader On Demand client is a command-line utility that provides a means of importing data into Oracle CRM On Demand from external data sources. It has two functions:

* Insert function. This function takes records from a file and adds them to Oracle CRM On Demand. (related to F)

* Update function. This function modifies existing records in Oracle CRM On Demand, using records from an external data source. (related to F)

Reference: Oracle CRM On Demand Online Help, Downloading the Oracle Data Loader On Demand Client Utility

Question No : 25

Since Managers want to see a list of activities for each account as well as a list of accounts with expected revenue greater than \$50,000. When there are no accounts with expected revenue greater \$50,000, then links to sales tools should appear. How would you accomplish this requirement?

- A. Create a dashboard with a section containing a Text object that contains links to the sales tools.
- B. Create a dashboard with a section containing a conditional Link or Image object that contains links to the sales tools.
- C. Create a dashboard with a section containing a static Link or Image object that contains links to the sales tools.
- D. Create a dashboard with a section containing a conditional Guided Navigation Link object that contains links to the sales tools.
- E. Create a dashboard with a section containing a static Guided Navigation Link object that contains links to the sales tools.

Answer: D

Explanation: Guided navigation links in interactive dashboard pages can be static or conditional. Static links always appear.

Conditional links appear only if the results meet certain criteria.

Reference: Oracle CRM On Demand Online Help, Adding Guided Navigation Links to Interactive Dashboard Pages

Question No : 26

To enhance user experience at your company, you are thinking about using Web applets to embed external HTML Web content in several areas of CRM on Demand. However, it is important to know that web applets cannot be used in all application areas. Which area does NOT support Web applets?

- A. Record type Detail pages
- B. A record type Homepage
- C. My Homepage
- D. The Action bar
- E. Reports Homepage

Answer: E

Explanation: RSS feed applets are a type of custom Web applet, created by the company

administrator, in which the URL for an RSS feed is specified. RSS feed applets can therefore appear in the following places:

- Record type Detail pages (not A)
- Record type homepages (not B)
- My HomePage (not C)
- The Action bar (not D)

W Reference: Oracle CRM On Demand Online Help, orking with RSS Feed Applets

Question No : 27

To increase user adoption and ease of use, your Service department requested access to their Web based Service portal from CRM on Demand. Their goal is to allow users to have access to both systems the same browser window.

The best design option to meet this requirement.

- A. Use a Custom Object and only give service users access to that tab.
- B. Create a custom Web tab that points to the service portal.
- C. Use a web link that opens the service portal in a new window.
- D. Leverage dashboard functionality to display the service portal.
- E. Use a combination of dashboard functionality and custom objects to display the service portal.

Answer: B

Explanation: A Web link is a custom field that allows you to place a hyperlink to an external Web site or Web-based application in a record in Oracle CRM On Demand. You can use a Web link custom field to provide a convenient way for users to navigate to another Web page, including another page in Oracle CRM On Demand. You can configure a Web link to simply open another Web site. You can also configure the Web link to pass specific information from the Oracle CRM On Demand record as a parameter in the URL.

Reference: Oracle CRM On Demand Online Help, Setting Up Web Links

Question No : 28

Which two record types can have an asset as a child object?

- A. Account
- B. Opportunity
- C. Contact
- D. Lead
- E. Product

Answer: A,C

Explanation: A: When you want to track a product you've sold to a customer or company, link the product record to the account as an asset.

To link a product record to an account as an asset

1 Select the account.

2 On the Account Detail page, scroll to the Assets section, and do one of the following:

* To create an asset, click New.

By default, the creator of the asset is the owner of the asset.

* To update asset information, click the Edit link next to the existing asset.

3 On the Asset Edit page, enter the required information.

C: Track the contact assets, see Tracking Assets (on page 162).

Note: This step is specific to Oracle CRM On Demand Financial Services Edition.

Reference: Oracle CRM On Demand Online Help, Tracking Assets

Question No : 29

Big industries, Inc has the reporting structure depicted below. Is this an acceptable reporting structure for forecasting in CRM on Demand?



- A. Not enough information
- B. Yes, because all reporting structure combinations are allowed
- C. No, because there is more than 1 participant at the top of the structure.
- D. Yes, because every participant at the lower level has a manager.
- E. Yes, because all participants at the top of the structure have subordinates.

Answer: C

Explanation: The reporting structure determines whose records the managers can access. It also determines whose data is included in calculations for forecasting as well as reports for managers and executives.

Participants in forecasts are chosen by role. Your company's reporting structure, and the roles you choose for the forecast participants must be set up so that the participants roll up to one top-level user. Typically this top-level user is a company vice-president or chief executive officer (CEO).

Reference: Oracle CRM On Demand Online Help, Setting Up Forecast Definition

Question No : 30

When selecting a column to filter or sort report, which should you choose to have the LEAST impact on performance?

- A. Custom fields
- B. Custom pick lists
- C. Indexed fields
- D. Fields containing CASE statements
- E. Standard pick lists

Answer: C

Explanation: Index fields improves filter and sorting performance.

Question No : 31

Floyd, an Inside Sales Representative in your organization, has complained about his inability to prepare and submit forecast. After some Investigation on the Issue, you find out that he's not receiving the weekly alerts sent to all other forecast participants. What is the possible root cause of this issue?

- A. Floyd hasn't been added to the Forecast book of business
- B. Floyd's role is not included in the forecast.
- C. Floyd must add his name to the forecast participants list.
- D. Floyd does not have any direct reports.
- E. Floyd's profile does not have a quota value to forecast against.

Answer: B

Explanation: Participants in forecast generation are chosen by role. Your company's reporting structure, and the roles you choose for the forecast participants must be set up so that the participants roll up to one top-level user. Typically this top-level user is a company vice-president or chief executive officer (CEO).

Add the roles for those users who are to participate in the forecast to the Forecasting Roles area.

Reference: Oracle CRM On Demand Online Help, Setting Up Forecast Generation

Question No : 32

Which data access control mechanism determines whether users can see a record type in the drop down list in the Search box?

- A. The record type access setting in the role is Can Create for the record type.

- B. The record type access setting in the role is Can Read All Records for the record type.
- C. The record type access setting in the role is Has Access for the record type,
- D. The default Access Profile is at least Read/Create for the record type.
- E. The owner Access Profile is at least Read/Create for the record type.

Answer: C

Explanation: Has Access. When the Has Access check box of the Role Management Wizard is selected for a

primary record type on a role, users who have the role can access records of that record type. If the Has Access check box is not selected for a record type on a role, users who have the role are denied all forms of access to the record type. For example, if the Has Access check box is not selected for the Account record type on a role, all forms of access to the Account record type, including related applets, search capabilities, and other access to the Account record type, are denied to users who have the role. Then the following can occur:

- * If a user who does not have access to the Account record type attempts to associate an opportunity with an account record, the operation fails.
- * If a user who does not have access to the Account record type sees an opportunity that is already linked to an account, the user is not able to view any details of the linked account record.

Reference: Oracle CRM On Demand Online Help, About Record Type Access in Roles

Question No : 33

You should enable the book selector for the company if you want users to be able to:

- A. Limit search queries to the records in particular book of business
- B. Be added to a book of business as a book user
- C. Create their own book of business hierarchies
- D. Delegate their record access to another user

Answer: A

Explanation: If the Book selector is enabled for the company, the Book selector field appears in targeted searches and advanced searches, in the title bar of list pages, and in the Reports Homepage. The Book selector is used to limit a targeted search to a custom book or a user book that can contain the record that the user wants to find.

Reference: Oracle CRM On Demand Online Help, Books in the Book Selector

Question No : 34

You have already used your limit of 35 custom fields with the field type of Check box For Accounts. How can you add more?

- A. You can delete fields from other record types, such as Contacts.
- B. You cannot add any more.
- C. You can move some fields off your page layout.
- D. You can request more space for data storage.

Answer: B

Explanation:

Note: the list showing the maximum number of custom fields which can be created for each record type.

Record Type Check Box Currency Date Date/Time Integer Multiselect Picklist

Account 35 80 25 25 35 10

Contact 35 25 25 25 35 10

Etc.

Question No : 35

Update Values action is only available when using which workflow rule trigger event?

- A. Before Modified Record Saved
- B. Record Deleted
- C. Modified Record Saved
- D. New Record Saved

Answer: A

Explanation: The trigger Event 'Before modified record saved' has the (only) action Update Values.

Reference: Oracle CRM On Demand Online Help, Trigger Events and Actions on Workflow Rules

Question No : 36

One of your users does not see the Campaigns tab when accessing CRM on Demand. You have confirmed that Campaigns is one of the available tabs for the user's role and that the role does give access to that record type.

Why can he not see the Campaigns tab?

- A. The user has read-only default access to campaign records.
- B. The user has no active campaigns.
- C. The user has read/create owner access to campaign records.
- D. The user needs to move the tab to the selected tabs box in his personal tab layout.

Answer: D

Explanation: See step 4 below.

To change your tab order (or adding tabs)

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In the Layout Personalization section, click the Personal Layout link.
- 3 In the Personal Tab Layout section, click the Tab Layout link.
- 4 In the Available Tabs box, select the tab you want to add, and then click the right arrow button to move it from the Available Tabs box to the Selected Tabs box.
- 5 In the Selected Tabs area, select one tab at a time and use the up arrow button or down arrow button to move the tab until it appears in the order you want.
- 6 Save the record.

NOTE: The tabs across the top of your pages provide the starting point for managing your data. The role your administrator assigns to you determines what tabs are available to you and the order in which they initially appear.

You can personalize your tabs only if the Personalize Tabs privilege is enabled for your role.

Reference: Oracle CRM On Demand Online Help, Displaying Your Tabs

Question No : 37

Which option does the Default Access Profile associated with a role apply?

- A. A record owned by a user with the role IP
- B. Team members added by a user with the role
- C. A record not owned by a user with the role
- D. Group members of a user with the role

Answer: C

Explanation: The default access profile on a role controls the access rights of a user to records that are not owned by that user, but are visible to the user because the Can Read All Records option is selected for the relevant record type in the record-type access settings on the user's role.

Reference: Oracle CRM On Demand Online Help, Default Access Profile

Question No : 38

If a user does NOT have the All Fields In Search and Lists privilege enabled for her role, what will she see when she creates a new list of Accounts?

- A. Only the fields available on her Account Detail page layout
- B. All fields available for Accounts, but no fields for other record types
- C. Only those fields that she specified in her Personal Layout page
- D. Only the Account fields that have values entered in them on the accounts that she owns
- E. Only the Account fields that have values entered in them on any of the accounts in the system

Answer: A

Question No : 39

You have set up Product records for your company and selected the Orderable check box for all of them. On which two pages can the Product List be made available so that users can select a product?

- A. Lead Details page
- B. Forecast Details page
- C. Asset Detail page
- D. Opportunity Product Revenue Detail page
- E. Product Category administration page

Answer: C,D

Question No : 40

As the request of sales management, you have created a custom Web tab for Sales Representatives in your organization.

What area of the application will you use to grant all Sales Representatives access to the new tab?

- A. "Custom Web Tabs" under "Application Customization"
- B. "Global Web Applets" under "Application Customization"
- C. "Personal Layout" under "My Setup"
- D. "Access Profiles" under "User Management & Access Controls"
- E. "Role Management" under "User Management & Access Controls"

Answer: E

Explanation:

After you add a custom Web page to Oracle CRM On Demand, you must make it available to the user role before users can see it.

Note:

You can add a role to Oracle CRM On Demand by doing the following:

- * Creating a new role
- * Copying an existing role, renaming the copy, and then editing the privileges and access rights of the copy

To add a role

1 In the upper right corner of any page, click the Admin global link.

2 In the User Management and Access Controls section, click User Management and Access Controls.

3 In the Role Management section, click Role Management.

4 In the Role List page, in the Translation Language field, choose your company's primary language.

5 Do one of the following:

* To create a new role by copying an existing role, click Copy on the role that you want to copy.

* To create a new role that is not based on an existing role, click New Role in the title bar of the page.

Reference: Oracle CRM On Demand Online Help, To display an external Web page in a tab

Question No : 41

A group of users stated that they can see the Lead Analysis Dashboard you set up, but cannot see reports on the page. What is the problem and how will you fix it?

A. The users do not have access to the reports. So you will add these reports to the user's profile.

B. The users do not have access to the dashboard. So, you will go to the Content Management page to add the user's role to the dashboard.

C. The reports are not connected to the dashboard properly. So, you will go to the Manage Dashboards page to delete the reports from the dashboard and add them again.

D. The users do not have access to the reports. So, you will add the user's role to the Shared Custom Analyses folder in which the reports are saved.

E. The users do not have the privilege to view dashboards. So, you will go to the Role Management page to add the Manage Dashboards privilege to the user's role.

Answer: D

Explanation: When a folder is created, it becomes visible on the Reports Homepage. All users with access to the Shared Custom Analyses folder will see newly created Company Wide Shared folders. If needed, visibility to the shared folder may be restricted by linking user roles to it. If no user roles are linked to the folder, visibility remains public.

Note on the exact procedure:

To set up user visibility to a shared report folder

1 In the upper-right corner of any page in Oracle CRM On Demand (not Oracle CRM On Demand Answers), click the Admin global link.

2 On the Admin Homepage, in the Content Management section, click the Content Management link.

3 On the Content Management page, in the Report Folders section, click the Shared Custom Analyses link.

The Folders List page displays all subfolders for the Shared Custom Analyses parent folder.

NOTE: All users have visibility to the Shared Custom Analyses root folder.

4 Then you can:

* Click the Folder Name to set visibility to the top-level folder.

* To restrict visibility to a subfolder, click the Subfolders link until you reach the appropriate folder. Then

click its name in the Folder Name column.

5 On the Folder Details page, click Add Roles.

6 Click the Lookup icon next to each field to link user roles.

7 To remove a user role from having visibility to a report folder, click Remove.

8 Click Save.

9 If you set visibility for a subfolder, you can click the folder name next to Parent Folder to go back to the listing of its subfolders.

Reference: Oracle CRM On Demand Online Help, Setting Up User Visibility to Shared Report Folders

Question No : 42

You have a business requirement to make product inventory information available to sales reps on read only basis. The inventory information is maintained in a Web based application outside of CRM On Demand, but sales reps need to be able to look up inventory information about a prospect's product Interest when actively working with Opportunity records in CRM On Demand. What is the best way to meet this business requirement?

A. Configure a custom object in CRM on Demand to hold the product inventory information Associate the custom objects to the Opportunity record layout for sales reps. then use Web

Services to load the inventory data into the custom object each night.

B. Configure a custom object in CRM on Demand to hold the product inventory information. Associate the custom object to the Opportunity record layout for sales reps. then use Data Loader to load the inventory data into the custom object each night.

C. Configure a Web link for the Opportunity record. Set it up to pass the Product Interest field value into the URL and launch the external product Inventory application in a separate window. Add the Web link field to the Opportunity record layout for sales reps.

D. Configure a Web tab In CRM on Demand to launch the external product Inventory application to allow sales reps to search for the product Inventory Information that they need without leaving CRM on Demand.

Answer: C

Explanation: A Web link is a custom field that allows you to place a hyperlink to an external Web site or Web-based application in a record in Oracle CRM On Demand. You can use a Web link custom field to provide a convenient way for users to navigate to another Web page, including another page in Oracle CRM On Demand. You can create Web link custom fields for any record type. For example, you might define a Web link field for the account record type that updates the account details with values from another application. As with other custom fields, you must add Web Link fields to your record page layouts to make them visible to your users.

Reference: Oracle CRM On Demand Online Help, Setting Up Web Links

Question No : 43

You are the administrator for CRM on Demand at a company that is based in the United States but has offices in several other countries. You received an email from a sales manager in France that his want to change the language for the application to French, but the only option they see for language on their Personal Detail pages is English-American. What do you need to do to correct this problem?

A. Remove the Default Language on the Company Profile page so that users can select the language at the Personal Detail level.

B. Set up valid exchange rates to convert the company default currency Into the Euro.

C. Reassign the users to a role that has the French language privilege selected.

D. Activate the French language for the company by selecting the French check box on the Company Languages Control page.

E. Set the Language access level to at least Read/Edit in the Default Access Profiles for the roles.

Answer: D

Explanation: Oracle CRM On Demand is available in many languages. All default text fields supplied with the product, such as fields and picklist values, along with online help and tutorials are shown in the available languages.

Initially, the only active language is the one that was selected as the company default language when your company signed up for Oracle CRM On Demand.

To make the language choices available to your users, you must activate them.

To activate languages

1 In the upper right corner of any page, click the Admin global link.

2 Click the Company Administration link.

3 In the Company Profile section, click the Languages link.

4 In the Active column, select the languages you want to make available to your employees.

5 Save the record.

Reference: Oracle CRM On Demand Online Help, To activate languages

Question No : 44

You are importing Account records into CRM on Demand using the data import tool in the application. If you mistakenly map the Location field from your source data to the Billing Address 1 field in CRM On demand what happens during the Field Mappings Validation step of the import tool?

- A. You receive an alert and can correct the mistake before submitting the import request
- B. You do not receive an alert and you can submit the import request. The data is imported as mapped.
- C. You receive an alert and the mapping is automatically repaired for you before you submit the import request.
- D. You do not receive an alert and you can submit the import request. All records are rejected during the import.

Answer: B

Explanation: If the data types of the two fields match the importation will work fine without any alerts.

Note: Map the fields in your file to Oracle CRM On Demand fields. At a minimum, you need

to map all required fields to column headers in the CSV file.

The Import Assistant lists the column headers from your import CSV file next to a drop-down list showing all the fields in that area in Oracle CRM On Demand, including custom fields you added.

Reference: Oracle CRM On Demand Online Help, Importing Your Data

Question No : 45

Susan Keene is the VP of Marketing. Susan wants her administrative assistant, Robert, to have access to the same records that she does, so he has all of the information he needs to support her. She wants to make sure that Robert's access includes those records that she has access to because of her manager visibility. What is the best way to set up this access?

- A. Give Robert the same user role as the one assigned to Susan.
- B. Give Robert the same default Access Profile as the one assigned to Susan
- C. Select the Manager Visibility setting for Robert.
- D. Add Robert to Susan's Delegated Users list on her User Details page and grant him access to any records that Susan can access.
- E. Set up a book of business for all of the records that the VP can access and grant Robert access to the book.

Answer: D

Explanation: When the delegated users feature is enabled, users can delegate owner access of their records to other users. In addition, users who have the appropriate privileges (typically the company administrator) can appoint delegates for other users.

To add delegated users (see step 5 and 6 below).

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click User Management and Access Controls.
- 3 On the User Management and Access Controls page, click User Management.
- 4 On the User List page, click Last Name for the user for whom you want to add delegates.
- 5 On the User Detail page, scroll down to the Delegated Users section, and click Add in the title bar of that section.
- 6 On the Delegated Users Edit page, click the Lookup icon.