Oracle

1Z0-527 Exam

Oracle CRM On Demand Essentials

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Question: 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: A

Explanation:
A Date Field is required.

Question: 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: B, C

Explanation:
After you set up your forecast definition, certain changes that you make to user records will require you to update your forecast definition settings.
You must update your forecast definition settings after you make the following changes to user
* Adding or removing employees from the roles included in the forecast (B). If you add or remove employees from employees from the roles that are included in the forecast, you must update the forecast definition settings.
* Deactivating users who are participants in the forecast hierarchy (C). When an employee leaves your company, you must change the status for that user to Inactive. If the inactive employee was a

forecast participant, the Reports To field for any forecast users reporting to that employee must also be updated, unless you select the option to allow forecasts for inactive users. If you assign users to a new manager when you make a former manager inactive, make sure that the new manager's role is also included as part of the forecast definition.

* Changing the name in the Reports To field in a participant's user details. When you change the name in a participant's Reports To field, make sure that the new manager's role is also included in the forecast definition. The forecast participant hierarchy must include managers for everyone except the person at the top level. If the role assigned to the new manager is not one that is currently included in the forecast definition, add it in Step 3 of the setup wizard.

Question: 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: 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: A

Explanation:
Account records are central to how you manage and view your data. As a result, you should enter as much information about accounts as you can.
The Reassign Account field indicates that the account should be reassigned. If your company administrator has set up account assignment rules, selecting this field triggers assignment
manager to process the account again and assign it according to the rules.
NOTE: The processing time for reassigning records can vary depending on the
complexity of your company's assignment rules, the number of records to be
reassigned, and the current system load. In the case of accounts, the processing
time is also affected by the number of team members and the number of contacts
and opportunities associated with the record. The owner name changes when the
record is reassigned.
Include Team Assignment: If the rule criteria are met, the team members are assigned to the account.
Assign To Territory: If the rule criteria are met, the record is assigned to this territory.
Incorrect answers:

Question: 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: B

Question: 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: A, C

Explanation:
Custom object reporting is currently supported only in real-time subject areas. It
is not available in historical subject areas.
Incorrect answers:
B
E

Question: 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

Question: 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: A

Question: 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.
Incorrect answers:
C: Workflows is for organizing processes

Question: 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: B

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.
    * Determine whether the corporate structure is relevant to data management.
    * Determine the data affiliations in your company.
    * 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.

Question: 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: C

Explanation:
After a quota is created, the monthly quota values are automatically reflected in the forecast after the forecast is generated. All active quotas are added together for the month and the totals are displayed in the forecast. If you do not want a quota to be included in your forecast, set the Status field to Inactive until you are ready to track the quota. The Forecast Detail page displays forecast information for the selected forecast participant. This page shows the forecast summary, which lists projected revenue amounts by fiscal month, the corresponding user quota and percent attainment, as well as a list of the individual's forecasted opportunities, revenues or products.

Question: 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.

Question: 13

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.
E. Answer Pending

Answer: E

Question: 14

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: 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.

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