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**Vendor:** Oracle

**Exam Code:** 1Z0-527

**Exam Name:** Oracle CRM On Demand Essentials

**Version:** Demo

### 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.

**Correct Answer:** C

#### Explanation

#### Explanation/Reference:

Explanation:

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

### 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

**Correct Answer:** CE

#### Explanation

#### Explanation/Reference:

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)

References:

### 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.

**Correct Answer: C**  
**Explanation**

**Explanation/Reference:**

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.

**Correct Answer: CE**

**Explanation**

**Explanation/Reference:**

Explanation:

C: Field "Include Team Assignment"

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

References:

**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.

**Correct Answer: E**

**Explanation**

**Explanation/Reference:**

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.

References:

**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

**Correct Answer:** BD

**Explanation**

**Explanation/Reference:**

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.

References:

#### **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

**Correct Answer:** D

**Explanation**

**Explanation/Reference:**

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.

References:

#### **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.

**Correct Answer:** D

## Explanation

### Explanation/Reference:

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.

References:

### 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

**Correct Answer:** D

### Explanation

### Explanation/Reference:

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 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.

**Correct Answer: A**  
**Explanation**

**Explanation/Reference:**

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.

References:

**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

**Correct Answer: B**  
**Explanation**

**Explanation/Reference:**

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.

References:

**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

**Correct Answer: D**

## Explanation

### Explanation/Reference:

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.

References:

### QUESTION 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

**Correct Answer: C**

### Explanation

### Explanation/Reference:

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.

References:

**QUESTION 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.

**Correct Answer: C**

**Explanation****Explanation/Reference:**

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.

References:

**QUESTION 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

**Correct Answer: AC**

**Explanation****Explanation/Reference:**

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.

References:

**QUESTION 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

**Correct Answer:** ABE

**Explanation**

**Explanation/Reference:**

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.

References:

**QUESTION 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.

**Correct Answer:** A

**Explanation**

**Explanation/Reference:**

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.

References:

**QUESTION 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.

**Correct Answer: C**

**Explanation**

**Explanation/Reference:**

Explanation:

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

#### **QUESTION 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.

**Correct Answer: BE**

**Explanation**

**Explanation/Reference:**

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.

References:

#### **QUESTION 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.

**Correct Answer: B**

**Explanation**

**Explanation/Reference:**

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.

References:

### QUESTION 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.

**Correct Answer:** BE

#### Explanation

#### Explanation/Reference:

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.

References:

### QUESTION 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.

**Correct Answer: C**  
**Explanation**

**Explanation/Reference:**  
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.

References:

### **QUESTION 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.

**Correct Answer: D**  
**Explanation**

**Explanation/Reference:**  
Explanation:

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

References:

### **QUESTION 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.

**Correct Answer: ADF**  
**Explanation**

**Explanation/Reference:**  
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)

References:

### QUESTION 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.

**Correct Answer:** D

#### Explanation

#### Explanation/Reference:

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.

References:

### QUESTION 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

**Correct Answer:** E

#### Explanation

#### Explanation/Reference:

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 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.

**Correct Answer:** B

**Explanation**

**Explanation/Reference:**

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.

References:

#### **QUESTION 28**

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

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

**Correct Answer:** AC

**Explanation**

**Explanation/Reference:**

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.

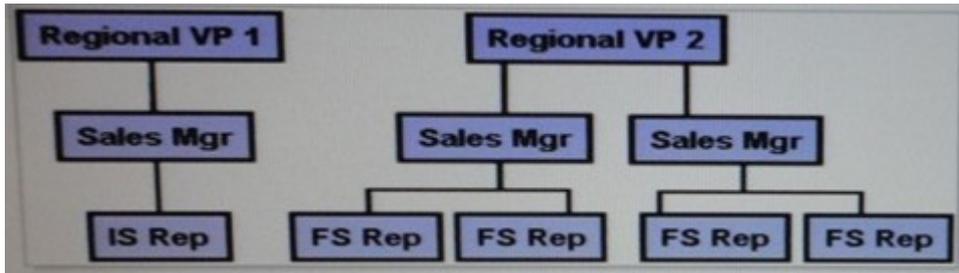
\* To update asset information, click the Edit link next to the existing asset. 3 On the Asset Edit page, enter the required information.

C: Track the contact assets, see Tracking Assets (on page 162). Note: This step is specific to Oracle CRM On Demand Financial Services Edition.

References:

#### **QUESTION 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.

**Correct Answer:** C

**Explanation**

**Explanation/Reference:**

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).

References:

**QUESTION 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

**Correct Answer:** C

**Explanation**

**Explanation/Reference:**

Explanation:

Index fields improves filter and sorting performance.

**QUESTION 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.

**Correct Answer:** B

## Explanation

### Explanation/Reference:

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.

References:

### QUESTION 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.

**Correct Answer: C**

### Explanation

### Explanation/Reference:

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.

References:

### QUESTION 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

**Correct Answer: A**

### Explanation

### Explanation/Reference:

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.

References:

**QUESTION 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.

**Correct Answer:** B

**Explanation****Explanation/Reference:**

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 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

**Correct Answer:** A

**Explanation****Explanation/Reference:**

Explanation:

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

References:

**QUESTION 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.

**Correct Answer:** D

**Explanation****Explanation/Reference:**

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.

References:

#### **QUESTION 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

**Correct Answer: C**

#### **Explanation**

#### **Explanation/Reference:**

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.

References:

#### **QUESTION 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

**Correct Answer: A**

#### **Explanation**

#### **Explanation/Reference:**

Explanation:

#### **QUESTION 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

**Correct Answer: CD**

#### **Explanation**

#### **Explanation/Reference:**

Explanation:

#### **QUESTION 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"

**Correct Answer:** E

#### **Explanation**

#### **Explanation/Reference:**

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.

References:

#### **QUESTION 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.

**Correct Answer:** D

#### **Explanation**

#### **Explanation/Reference:**

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.

References:

#### **QUESTION 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.

**Correct Answer: C**

**Explanation**

**Explanation/Reference:**

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.

References:

#### **QUESTION 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.

**Correct Answer:** D

**Explanation**

**Explanation/Reference:**

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.

References:

#### **QUESTION 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.

**Correct Answer:** B

**Explanation**

**Explanation/Reference:**

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.

References:

#### **QUESTION 45**

Susan Keene is the VP of Marketing. Susan wants her administrative assistant, Robert, to have 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 books 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.

**Correct Answer:** D

**Explanation**

**Explanation/Reference:**

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. 7 In the Search for a User window, select the user whom you want to be a delegate. 8 If Delegated User Roles are defined, select the role from the list. 9 Save the record.

References:

#### **QUESTION 46**

Select three reasons for which Products are typically linked to Opportunities.

- A. To track which products belong to the opportunity
- B. To base company forecasts on assets
- C. To calculate opportunity revenue based on product revenue
- D. To base company forecasts on product quantities
- E. To calculate product price discounts based on the opportunity category
- F. To track with products the account on the opportunity has already purchased

**Correct Answer:** ACD

**Explanation**

**Explanation/Reference:**

Explanation:

You can link products to opportunities to:

- \* Track which products belong to the opportunity
- \* Calculate opportunity revenue based on product revenue
- \* Base your company's forecasts on product revenue or product quantities

References:

#### **QUESTION 47**

You have a business requirement to customize the Account Details page for account managers. They need a basic set of fields on the page for all accounts. However, if the account is a Tier 1 customer, they want to see an additional set of fields. If the account is a competitor, they want to have the base set of fields plus some additional fields to record competitor details. What is the best way to meet this requirement without having a large number of fields on every account page?

- A. Set up three different roles for the account managers, each with a different Account page layout assigned to the role.
- B. Use custom objects to set up separate Account pages for Tier 1 and competitor accounts.
- C. Use workflow rules to trigger the appropriate Account page layout, based on the type of account.
- D. Set up Dynamic Page Layouts for Accounts for the account manager role.

**Correct Answer: D**

**Explanation**

**Explanation/Reference:**

Explanation:

The right look and feel of an application is important for user adoption, and one way to achieve the right look and feel is by customizing page layouts. As part of the customizing process, you can:

\* Add custom fields to the Edit, Detail, and Create forms.

\* Make fields required on the Edit and Create forms.

\* Add or hide sections on the Detail pages.

You can make sections unavailable (hidden) to your employees or you can make them available but hide them initially.

There are two methods of customizing page layouts. You can define static page layouts defining specific fields by role, or dynamic page layouts that change based on the type of record being created.

Dynamic page layouts can also be assigned by role.

You can create new layouts for each record type and then assign a page layout for each record type to a user role. When a user with that role signs in, the user then sees any customized layout specific to each record type.

References:

**QUESTION 48**

You have activated several currencies so that users in different countries can view revenue data in reports in their local currency. However, you received a complaint from a sales manager that she sees incorrect revenue numbers in her team reports now that she has switched to a different currency. What is the likely problem?

- A. you did not set up exchange rates for the newly activated currencies.
- B. Reports can only display data in the company default currency.
- C. All of the manager's team members must use the same currency for her reports to roll-up correctly.
- D. The manager does not have the role-based can read all records check box selected in her user profile.

**Correct Answer: A**

**Explanation**

**Explanation/Reference:**

Explanation:

The Currency setting provides the default currency amount linked with all new records the user creates.

When a user views revenue reports, they display in the user's default currency. If a manager sees cumulative revenue from users with different currencies, she sees the amount in her default currency (company administrators must set up exchange rates for this to occur).

References:

**QUESTION 49**

Your company needs to forecast total opportunity revenue, regardless of how much revenue deal products. Which forecast type should you choose when setting up your forecasts?

- A. Account Revenue
- B. Contact Revenue
- C. Opportunity Product Revenue
- D. Opportunity Revenue
- E. Opportunity Total

**Correct Answer:** D  
**Explanation**

**Explanation/Reference:**

Explanation:

Opportunity revenue forecasts report on the revenue noted in the opportunity records. The forecast numbers are calculated from the Revenue and Expected Revenue fields on all opportunity records. Opportunity revenue forecasts require sales representatives to fill in the opportunity Revenue and Close Date fields to indicate which opportunities they want to include in their forecasts. Any linked products are ignored in the forecast.

Note: Your company can base its forecasts on any of the following: opportunities, products, accounts, or contacts.

There are four types of forecasts:

- \* Opportunity product
- \* Opportunity revenue
- \* Account revenue
- \* Contact revenue

References:

**QUESTION 50**

Based on a request from your division's Sales Management team, you set Thursday as your Forecast Snapshot Day. What is the earliest day and time a Sales Representative can review her forecast?

- A. Wednesday at 12:00 AM
- B. Thursday at 12:01 AM
- C. Wednesday at 12:01 PM
- D. Thursday at 12:01 PM
- E. Thursday at 12:00 AM

**Correct Answer:** B  
**Explanation**

**Explanation/Reference:**

Explanation:

While setting up a forecast definition, in the Forecast Snapshot Day field, select the day of the month or the week that the forecast snapshot is to be created.

Forecasts are generated at the start of the selected day (that is, at one minute past midnight) in the time zone of the hosting facility.

References:

**QUESTION 51**

Identify two business use cases for Forecasts.

- A. Regulates a process that is often manual and inaccurate
- B. Helps companies to develop sales strategies
- C. Creates business opportunities to generate revenue
- D. Reports accurate and up-to-date information about expected sales
- E. Reports underachieving sales representatives

**Correct Answer:** BD  
**Explanation**

**Explanation/Reference:**

Explanation:

Forecasts in Oracle CRM On Demand automate a process that is often manual and sometimes inaccurate. Forecasts help companies to develop sales strategies. They also help companies to identify future

business needs by giving managers accurate and up-to-date information about expected sales and quarterly progress toward sales targets. Individual sales representatives do not have to compile statistics. Instead, they decide when to include a record in their forecasts. The remainder of the process is automatic.

References:

#### **QUESTION 52**

You have a requirement from the Customer Service organization. They want to have two pick list fields on the Service Request record, one for problem area and one for problem cause. They would also like to restrict which fields are shown in the Cause drop-down list based on which value is selected for the Area field. How can you meet this requirement?

- A. Create a field validation rule on the Cause field to restrict the fields that can be selected.
- B. Set up cascading pick lists with the Cause field as the parent pick lists.
- C. Set up cascading pick lists with the Area field as the parent pick list.
- D. Create a workflow rule to restrict the values in the Cause field.

**Correct Answer: C**

**Explanation**

**Explanation/Reference:**

Explanation:

Cascading picklists restrict the values of one picklist, the related picklist, based on the value selected in another picklist, the parent picklist. For example, a parent picklist might present a list of service request Categories and drive the value of a related picklist called Sub-Categories. When the user selects, for example, the value Installation for Category, the Sub-Categories picklist is dynamically constrained to show only the picklist values that are associated with the Installation Category.

References:

#### **QUESTION 53**

Currently users can convert leads to accounts, contacts, and opportunities at your company. However, the management team has decided that they no longer want users to be able to convert leads to Accounts, though they should be able to associate the lead to an existing Account record when they convert. Which administration page would you use to make this change?

- A. the lead assignment rules page
- B. the lead conversions mapping page
- C. the lead conversion layout page
- D. the lead page layout page
- E. the account page layout page

**Correct Answer: C**

**Explanation**

**Explanation/Reference:**

Explanation:

You can determine which options are available to users on the Convert Lead page by creating lead conversion layouts for the page, and assigning these layouts to user roles.

References:

#### **QUESTION 54**

You have been asked to grant a few users access to a new book of business you've set up. You have also been asked to ensure that each one of these users has the ability to access the list of other users associated to this same book.

- A. Make sure that access to the book user list is set at the company profile level.
- B. Make sure that access to the book user list is set at the user role level.

- C. Make sure that access to the book user list is set at the owner access profile level.
- D. Make sure that access to the book user list is set at the user profile level
- E. Make sure that access to the book user list is set at the default access profile level.

**Correct Answer: D**

**Explanation**

**Explanation/Reference:**

Explanation:

For each of these specific users we set their user profile so that they get the proper access.

**QUESTION 55**

You work for a Service Call Center as a CRM on Demand system administrator. The Service Manager would like to start tracking how the certain attributes change throughout the life of the service request. She would also like to track the user name and modification dates associated to these. What CRN on Demand functionality should you use to meet this requirement?

- A. Audit trail
- B. Analytics
- C. Workflow
- D. Dynamic layouts
- E. Custom lists

**Correct Answer: A**

**Explanation**

**Explanation/Reference:**

Explanation:

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

References:

**QUESTION 56**

Your company categorizes its accounts as Premium, First Tier or Second Tier based on various criteria. You created an Account Category pick list field with those values and added it to the Account page layout for all users. The company allows account managers to assign the categories based on their own assessments of their accounts. However, an account should never be designated a Second Tier account if it has \$1,000,000 or more in annual revenue.

Some account managers have been incorrectly assigning the Second Tier category to accounts with annual revenues greater than \$1,000,000 and you are looking at ways to prevent this. What is the best way to accomplish this using the functionality in CRM on Demand?

- A. Set up a dynamic page layout for Accounts using your custom Account Category field as the driving pick list. Then set a default field value of less than 1,000,000 for the Annual Revenue field for the Second Tier layout.
- B. Set a default field value of less than 1,000,000 for the Annual Revenue field to trigger if the Account Category is Second Tier and select the Post Default check box.
- C. Create a field validation rule on the Account Category field that checks the Annual Revenue field value, and if it is 1,000,000 or greater, then the Account Category field cannot be Second Tier.
- D. Create a workflow rule with a Before Modified Record is saved trigger for the Account Category field. Use an Update Values action and write an expression that updates the category to Premium or First Tier if the annual revenue is 1,000,000 or more.

**Correct Answer: C**

**Explanation**

**Explanation/Reference:**

Explanation:

You can use Oracle On Demand Expression Builder (Expression Builder) to create expressions for custom field validation rules.

The following are situations in which you might define custom field validation rules:

\* Enforcing business policy

Applies to this question. Here we can use an expression  $\leq 1000000$ .

\* Enforcing data format.

References:

### QUESTION 57

A sales representative has reported a problem with her data access. She can see the Opportunity related information section on her Account Detail page, where she sees a list of Opportunity records. She should be able to drill into any of those Opportunity records, but the only ones she can open are the ones that she owns. Her default Access Profile gives her Read-Only access to Opportunity related information for Accounts and her owner Access Profile gives her View access. What is the likely problem?

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

**Correct Answer: B**

**Explanation**

#### Explanation/Reference:

Explanation:

See \*\* below.

Oracle CRM On Demand then evaluates all the related access levels to determine if the Inherit Primary access level is present in the set of access levels and determines what records to display, as follows:

\* If the Inherit Primary access level is not found:

/ If the most permissive access level is No Access, then the related records are not shown. / If the most permissive access level is anything other than No Access, then all related records are shown, including records the current user is not authorized to see. \*\* If the Inherit Primary access level is found, and the Can Read All Records check box is selected for the related record type in the current user's role, then all related records are displayed.

References:

### QUESTION 58

Select the true statement regarding Page layouts.

- A. Page layouts and End Users Detail Pages are synonymous.
- B. Page layouts are specific to the role but can be applied across different record types
- C. Page layouts can be created by End Users, and then shared with other Users.
- D. Page layouts cannot be applied across different record types.

**Correct Answer: D**

**Explanation**

#### Explanation/Reference:

Explanation:

There are two methods of customizing page layouts. You can define static page layouts defining specific fields by role, or dynamic page layouts that change based on the type of record being created.

Dynamic page layouts can also be assigned by role.

You can create new layouts for each record type and then assign a page layout for each record type to a user role. When a user with that role signs in, the user then sees any customized layout specific to each record type.

Note: You can customize page layouts to improve the look-and-feel of Oracle CRM On Demand. The layout functionality for related items allows you to customize a related-list layout for most record types, excluding teams, to show the specified fields. You can select fields from related lists and some parent fields. You can select which fields that you want to appear, and you can specify the order of the fields that meets your business needs. However, you cannot select the number of rows that are displayed, and you cannot specify the sort fields.

References:

#### **QUESTION 59**

Select the true statement regarding a user's access to records.

- A. Adding a user to a book of business negates the role settings for that user.
- B. Books of business and user role settings work together to define a user's access to records.
- C. Adding a user to a book of business can interfere with other assignments of that user to other books.
- D. Assigning a user to a book of business automatically changes a user's role settings.

**Correct Answer: B**

#### **Explanation**

#### **Explanation/Reference:**

Explanation:

The methods for data access include assigning user role privileges, assigning report folders to roles, using analytics visibility settings, using the Book of Business feature, and granting access through user delegation.

We like to think of the Book of Business feature as an additional filter for users of Oracle CRM On Demand. With the Book of Business feature activated for a company and the Look In selector displayed, a user assigned to one or more books can limit the data returned in a report to a specific book and any subbooks of the selected book.

Users may have a defaulted book in the Look In selector. The administrator can set this default by updating the Default Analytics Look In Setting field on each user's profile in Oracle CRM On Demand.

#### **QUESTION 60**

You selected the Held Sales Rep, Regional Manager, and Executive roles when you defined your company forecast.

Jane is assigned the Field Sales Rep role. She reports to Molly, who is assigned the Sales and Marketing role. What will happen when the company forecast runs?

- A. The forecast will run with Jane and Molly's forecasted numbers included.
- B. The forecast will fail.
- C. The forecast will run without Jane's forecasted numbers included.
- D. The forecast will run without Molly's forecasted numbers included.
- E. The forecast will run automatically and the Primary Contact will receive an email saying that there is a potential issue.

**Correct Answer: B**

#### **Explanation**

#### **Explanation/Reference:**

Explanation:

In the Reporting Structure Jane (Field Sales Rep) must roll up to the Executive. Here Jane reports to Molly (Sales and Marketing role), but Molly does not report to you (the Executive). The Forecast will therefore fail.

References:

#### **QUESTION 61**

You are importing Account records. You are basing your duplicate checking on External Unique IDs. Which two statements about your import CSV file are true?

- A. Each record must have data for all of the required fields.
- B. If there is no External Unique ID for a record, but the Account Name and Location data are present, an External Unique ID is created for the record on import.
- C. The required fields do not have to have data as long as the External Unique ID is populated for each record.
- D. the Account Name and Location fields can be the same in numerous records, as long as the External Unique ID field is unique in each record.
- E. the External Unique ID and the combination of the Account Name and Location must be unique for each record.

**Correct Answer:** AE

**Explanation**

**Explanation/Reference:**

Explanation:

Note 1: External Unique ID. Refers to the external ID of the current record to be imported. The External Unique ID is directly involved in duplicate checking.

If no External IDs exist or you don't map External IDs in your file to the External ID fields in the application, the application determines duplicates by comparing certain fields

Note 2: Your CSV file might have External IDs, which are generated by many software systems. Using External IDs makes importing from external systems easier, where a primary key/foreign key relationship is represented by storing IDs in the related file. If you have External ID codes for each of your records, you can use the Import Assistant to update fields in those records (except the External ID field). If you do not have External ID codes, you can only update those fields that are not used for duplicate checking.

**QUESTION 62**

Select the true statement regarding search layouts for each role.

- A. Administrators can configure a different search layout for each role.
- B. Administrators create only one search layout for every role.
- C. End Users create multiple search layouts for their role.
- D. End Users can create multiple search layouts for roles within their organization.

**Correct Answer:** A

**Explanation**

**Explanation/Reference:**

Explanation:

If you search on a single record type, the search results are displayed in a List page, and you can then work with the list of records. The number of fields (columns) displayed in the list is determined by the search layout that your company administrator has defined for your role and the record type.

References:

**QUESTION 63**

Select two possible ways of creating new asset records.

- A. Click the Asset link In the Create box in the Action bar.
- B. Click the New button on the Assets tab
- C. Click the New button on the Assets related Information section on Account Detail page.
- D. Through the Data Import tools.
- E. Click the New button on the Assets related information section on Opportunity Detail page.

**Correct Answer:** CD

**Explanation**

**Explanation/Reference:**

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