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Oracle

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: C

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: C, E

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

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: C, E

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: E

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: B, D

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: D

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?



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