

Oracle

Exam 1z0-527

Oracle CRM On Demand Essentials

Version: Demo

[Total Questions: 10]

Question No : 1

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

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

Answer: C,E

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

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

- * Deactivating users who are participants in the forecast hierarchy. (C)
- * Adding or removing employees from the roles included in the forecast. (implies E)

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

Question No : 2

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

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

Answer: B

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

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

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

Question No : 3

For which records will the workflow actions be performed if this expression is added as a workflow rule condition?

PKE (• <PrimaryBillToState>•) < > [<PrimaryBillToState>]

- A. Records that are modified to change the value in the primary billing state field
- B. Records that do not have a value in the primary billing state field
- C. Records that have a value in the primary billing state field
- D. Records that have more than one primary billing state

Answer: A

Question No : 4

You created an Opportunity Assignment rule and you included an Assign to Territory for the rule. What happens when the rule is triggered and a record is assigned?

- A. The assigned owner of the record is also assigned to the specified territory
- B. All of the users assigned to the specified territory are added to the Opportunity team for the record
- C. All of the users assigned to the specified territory are added as owners of the record
- D. The Territory field value on the record is automatically updated to the specified territory.
- E. The record is assigned to the book of business for the specified territory.

Answer: D

Explanation: If the rule criteria are met, the record is assigned to this territory.

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

Question No : 5

Which two statements are true about manager visibility?

- A. It is best for one-time or short-term access needs.
- B. It is best for companies with 100 or fewer users.
- C. It can be enabled for selected user groups.
- D. It can only be enabled for the entire company.

Answer: A,D

Explanation: A: There is an overhead involved in having manager visibility enabled. When you are designing your book hierarchies, base your designs on the following principles:

- * The functionality provided by the Manager Visibility Enabled check box on the company profile is used as little as possible.

The Manager Visibility Enabled option allows managers to access the records of the users who report to them, and allows users to include data in subbooks in their searches.

D (not C): The Manager Visibility Enabled option on the Company Profile page.

Note: Manager Visibility - Allows you to see your own data, plus data directly owned by your subordinates. (This is the default setting.)

Manager Visibility Enabled: Select this option to allow managers to see the records of the users who report to them directly or indirectly. A user's manager is determined by the Reports To field on the User Detail page.

Reference: Oracle CRM On Demand Online Help, To update your personal details

Question No : 6

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

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

Answer: D

Explanation: See step 1-5 below.

To create a page layout

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the Page Layout section, click the required Page Layout link.
- 5 In the Page Layout list, do one of the following:
 - *Click the Edit link for an existing layout to modify it.
 - * Click the New Layout button to create a new layout.
 - * Click the Copy link to copy an existing layout.

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

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

Question No : 7

You are an administrator for CRM on Demand. You were asked to set up four new users in the system as soon as possible, so you decide to use the Quick Add button to get the user information in the system quickly Which important information will you have to open for each user profile to add, if you use the Quick Add option?

- A. The Reports To information
- B. The Role assignment
- C. The User ID
- D. The User email address
- E. The User status

Answer: A

Explanation: To add several users quickly, click Quick Add.

This opens the Quick Add page for you to enter required, limited information for each user.

For

example, it does not allow you to specify the reporting hierarchy.

Reference: Oracle CRM On Demand Online Help, To set up a user

Question No : 8

You are reviewing the business requirements for an implementation of CRM on Demand so that you can prepare a data import plan. There is a requirement to enable several processes that will require heavy use of custom Opportunity lists. You review the specific requirements for those lists and find that several custom fields will need to be used as filters and for sorting.

What should you do to optimize the performance of those lists after all of the data is imported into the system?

- A.** Create new custom Opportunity fields to use for the list filters and sorting. Map the data into those fields during data Import. Then, select the Case Insensitive check box when creating the custom lists.
- B.** Create new custom Opportunity fields to use for the list filters and sorting. Map the data into those fields during data Import. Then, set the sort order on those custom fields when creating the custom lists.
- C.** Select the Indexed field type when creating new custom Opportunity fields to use for the list filters and sorting. Then, map the data into those fields during data import.
- D.** Relabel the Indexed fields provided for the Opportunity object to use for the list filters and sorting. Then, map the data into those fields during data Import.

Answer: D

Explanation: We should use index on the custom fields that will be used for filtering and sorting.

This will improve performance.

Use Indexed Fields

Do the following:

- * Use indexed field to filter data in real-time reports.

Indexed fields are optimized so your report results appear more quickly.

- * Plan ahead when you set up your data to make sure that the correct data is stored in the indexed fields.

Following this practice allows you to build reports that use the indexed fields, incorporating them at the best possible places. Oracle CRM On Demand also has a limited number of indexed custom fields. The number varies according to the field type and record type.

Question No : 9

Which option describes a report that should not contain the record type ID column?

- A. A report that shows all opportunities with their associated expected and closed revenue.
- B. A report that shows total expected and closed revenue summarized by region.
- C. A report that lists all accounts for the west region with their associated opportunities,
- D. A report that shows all contacts in the east region with their associated major accounts.
- E. A report that lists all open service requests for the top 10 accounts

Answer: B

Explanation: No ID column is required for aggregated data being displayed by region.

Question No : 10

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

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

Answer: A

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

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

here. related to A).

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

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

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