Oracle 1z0-527

Oracle CRM On Demand Essentials
Version: 4.3

QUESTION NO: 1

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

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

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

QUESTION NO: 2

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

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

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

Changing the name in the Reports To field in a participant's user details.
* Deactivating users who are participants in the forecast hierarchy. (C)
* Adding or removing employees from the roles included in the forecast. (implies E)

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

QUESTION NO: 3

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

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

Answer: C

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

QUESTION NO: 4

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

A. All users on the team are given the same access level as the assigned record owner to the Account, and Its related Contact and Opportunity records.
B. All users on the team are also assigned to the territory specified in the Assign To Territory field for the rule.
C. Unless you selected the Include Team Assignment check box for the rule, no users are assigned to the team.
D. Only the users that meet the rule criteria are assigned to the team.
E. Each user on the team is given the specified access level to the Account, and its related Contact and Opportunity records.

Answer: C,E

Explanation: C: Field "Include Team Assignment"

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

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

QUESTION NO: 5

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

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

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

Reference: Oracle CRM On Demand Online Help

QUESTION NO: 6

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

Select two application areas not compatible with custom objects.

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

Answer: B,D

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

QUESTION NO: 7

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

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

Answer: D

Explanation: See step 1-5 below.

To create a page layout

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

2 Click the Application Customization link.

3 In the Record Type Setup section, click the link for the required record type.

4 In the Page Layout section, click the required Page Layout link.

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

*Click the Edit link for an existing layout to modify it.

* Click the New Layout button to create a new layout.

* Click the Copy link to copy an existing layout.

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

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

QUESTION NO: 8

Your company uses a custom list of Industries to classify your accounts, but the CRM Industry field type is set to pick list (read only) on the Account Field Setup page. You need to have the

custom Industry names appear in the Industry field pick list on the Account detail page. As the Administrator, how do you resolve this issue?

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

Answer: D

Explanation: To customize your company's industry list

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

2 In the Business Process Management section, click the Data Rules & Assignment link.

3 In the Industry Definition section, click the Industry Definition link.

4 From the Translation Language drop-down list, select your company's primary language.

5. On the Industry Edit page, fill in the information.

6 To manually enter the translated equivalent of the new industry:

a From the Translation Language drop-down list, select the language.

b Enter the translated equivalent in the Display Name field and click Save.

7 Save the record.

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

QUESTION NO: 9

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

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

Answer: D

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

* Account

* Application

* Business Plan

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

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

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

QUESTION NO: 10

Select the true statement regarding book structure.

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

Answer: A
Explanation: To set up an efficient book structure, you must plan your book hierarchies carefully. Consider the following guidelines when you design and refine the book hierarchies for your company:
* Do not create custom books that replicate user books.
* Determine the organization and access policies for your business data. (related to A)
* Determine whether the corporate structure is relevant to data management. (related to A)
* Determine the data affiliations in your company. (related to A)
* Design your books based on user needs, and consider the tasks where users most commonly use books.
* Design your books so that the functionality provided by the Manager Visibility Enabled check box on the company profile is used as little as possible.
* Keep the number of levels in your book hierarchies to a minimum.
* As far as possible, reduce the amount of cross-listing in the book structure. Cross-listing is the

practice of duplicating records across multiple books.

* Use workflow rules to automate book management.

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

QUESTION NO: 11

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

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

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

To set up a user's quota

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

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

link.

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

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

5 On the User Detail page, scroll down to the Quotas section and do one of the following:

Click the New Quota button.

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

6 On the Edit Quota page, complete the fields.

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

QUESTION NO: 12

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

A. The Forecast Definition page

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

Answer: D
Explanation: Note: See step 5 below.

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

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

To set up a user's quota

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

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

QUESTION NO: 13

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

Jane Jones is a sales representative who reports to Bill Williams. Her role gives her Read only default access and Read/Edit/Delete owner access to accounts. Jane owns the ACE Industries

account record in CRM on Demand. Manager Visibility is enabled.

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

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

Answer: C
Explanation: Delegated users gain the primary user's owner access to the records that the primary user owns or has access to through teams or groups. Delegated users do not gain the primary user's default access to records.
In this scenario Jane has Read/Edit/Delete owner access. The delegated user (Frank) will get this access. However, Bill Williams will not get any permissions through Manager Visibility.He has only the Read/Edit owner access. Bill Williams will not get further permissions through Manager Visibility either. He is not the manager of Frank Ford.

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

QUESTION NO: 14

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

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

Answer: C
Explanation:
To hide specific shared prebuilt reports and display others, clear the Access Analytics Reports -