



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.

Answer: A

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: BC

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

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: AC

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: C

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: AC

QUESTION 7

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

- A. Navigate to the Account Search Layout1
- B. Click the My Setup link

- C. Navigate to the Layout Wizard for Related Lists
- D. Navigate to the Page Layout Wizard

Answer: D

QUESTION 8

Your company uses a custom list of Industries to classify your accounts, but the CRM Industry field type is set to pick list (read only) on the Account Field Setup page. You need to have the custom Industry names appear in the Industry field pick list on the Account detail page. As the Administrator, how do you resolve this issue?

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

Answer: A

QUESTION 9

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

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

Answer: D

QUESTION 10

Select the true statement regarding book structure.

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

Answer: B

QUESTION 11

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

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

Answer: C

QUESTION 12

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

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

Answer: D

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

Answer: A

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.

Answer: B

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

Answer: C

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