**Instructions**

This OnTrack Administrator Evaluation for Sage CRM consists of 35 questions. Click in the box next to your chosen answer. Choose only the one answer you think is correct. Save your completed test. Forward your answers to your Success Coach as requested.

**Evaluation**

1. True or False: All CRM Administrators have the right to perform data uploads.

True

False

1. Inline Customization allows a user to make on the fly changes while being in

the \_\_\_\_\_\_\_\_\_\_\_\_ of CRM.

Front End

Middle Side

SQL Database

Remote Server

1. The Top Content in CRM tells you where you are located and is \_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Italicized

Hyperlinked

User Specific

Administrative

1. Which of the following is not needed in order to setup a new CRM user:

Username

Last Name

Password

Security Profile

1. True or False: A user marked as a resource uses a license key.

True

False

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ are stored in the SQL database and are \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Attached Documents / GIF’s

Users / Accessible via Google

Passwords / Encrypted

Searches / Searchable

1. True or False: Passwords cannot be recovered.

True

False

8. There is a \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ maximum number of Teams that can exist in CRM.

15

20

42

Virtually Unlimited

9. An administrator grants rights to My CRM and Team CRM to a user via:

The Security Profile

Team CRM

The System Menu

Their User Profile Details

10. My CRM is an area where a user can \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Manage Their Work

Build Reports

Build a Search Screen

All of the above

11. True or False: A System Administrator does not have the right to set another user’s security profile.

True

False

12. If a user leaves your organization, their user profile should be \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Deleted

Renamed

Disabled

Ordained

13. The following can be re-assigned from one user record to another:

Assigned Companies

Pending Tasks

Completed Tasks

Opportunities in Progress

All of the above

None of the above

14. Which of these statements about user templates is false:

An unlimited number of templates can be made by a system administrator.

Time zones can be set within a user template.

A different security profile can be assigned to each template.

Usernames are auto created based on first and last name within a template.

15. The user activity section is most often used for \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Seeing who is currently logged into CRM

Assigning tasks to users

Running sales reports

Linking external websites to CRM

16. By default, a user is locked out of CRM \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Indefinitely

Until they are unlocked by a System Administrator

For 15 minutes

For 5 minutes

17. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ are structured in tiers and assigned to users in order to drive security.

Territories

Profiles

Users

Teams

18. A security profile dictates whether a user can \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ information.

Delete

Insert/Edit/View/Delete

Edit/Delete

View/Edit/Delete

19. True or False: Fields can be deleted permanently from screens via screen customization.

True

False

20. Drop-Downs can be manipulated from:

The Main Menu

Administration | Customization | Associated Entity | Fields (tab)

Administration | Customization | Translations

The Logged In User

21. Translation changes allow an administrator to:

Change the names of certain buttons in CRM

Change field names

Change the name of a primary entity

Change tab names

All of the above

A and B only

22. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ is where a system administrator can indicate whether a field is required or not.

Field Level Security

A Security Profile

A User Record

New Lookup

23. True or False: A field can be set to read-only for all users except two specific users by a system administrator with rights to Customization.

True

False

24. The following are valid data types for new fields added to CRM:

Person

Company

Opportunity

Communication

All of the above

None of the above

25. The Top \_\_\_\_\_\_\_\_\_\_\_\_\_\_ of CRM tells a user where they are located and what they are focusing on in the system.

Area

Parameter

Content

Container

26. Lead uploads require a \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ file and \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ by the user uploading the list.

PDF / 50 min’s

Spreadsheet / Statistics

PST / Mapping

Spreadsheet / Mapping

27. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ is the process by which CRM helps prevent users and the system from entering in the same data twice.

Deduplications

Cross-Referencing

Double Entendre

Territory Handling

28. Duplicates in CRM can be matched based on the following values:

Exact Company Name

Begins With Company Name

Company Name and City Combination

Person Last Name Phonetic Match

All of the above

None of the above

29. True or False: An email alias cannot be a person’s real email address – rather it must be a generic catch all address like [sales@yourcompany.com](mailto:sales@yourcompany.com).

True

False

30. An email template must have the following:

A Subject Line

A Name

An Attachment

A Specified Entity

All of the above

None of the above

31. All but the following is true about email templates:

Any file type except a .zip file can be attached to a template.

Email templates can be associated with Quotes.

Email templates can merge in user information.

Aliases can be associated with templates.

All are true.

32. One reason an email template may not appear as an option when creating an email is:

The template is not activated.

The user does not have the right to use templates.

The template was not created for the entity from which the email was launched.

The CRM server is not on a network with Exchange Integration.

33. True or False: Keyword Search can be toggled on or off by the logged in user.

True

False

34. Locking CRM is performed by an administrator from the \_\_\_\_\_\_\_\_\_\_\_\_\_ portion of the Administrative menu.

Customization

User

Advanced Customization

System

None of the above

35. CRM named licensing uses a CRM license for \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Each named user

Only users who are currently logged in

Any users setup with email addresses

A single user at a time