**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.

[ ]  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