**Sales Evaluation **

1. True or False: Users can change their password on the MyCRM dashboard?

[ ]  True

[ ]  False

1. Each user has a limit of \_\_\_\_\_\_\_\_\_\_\_\_\_ personally created dashboards.

[ ]  20

[ ]  10

[ ]  Unlimited

[ ]  None

1. The Sage CRM calendar is comprised of \_\_\_\_\_\_\_\_\_\_\_\_ and \_\_\_\_\_\_\_\_\_\_\_\_\_\_.

[ ]  Communications and Activities

[ ]  Dashboards and Appointments

[ ]  Tasks and Appointments

[ ]  Territories and Tasks

1. By default, the Sage CRM calendar synchronizes \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ with supported versions of Outlook.

[ ]  Every minute

[ ]  Uni-directionally

[ ]  Bi-directionally

[ ]  Only when told

1. True or False: The Contacts tab in My CRM is a means by which users can indicate whether they are the account manager for a contact or not.

[ ]  True

[ ]  False

1. True or False: The Shared Documents tab in CRM is a central repository for your organizations documentation like brochures, product information, credit applications, etc. and not a place to store customer specific documentation.

[ ]  True

[ ]  False

1. Users can set all of the following values within the My CRM Preferences tab, except:

[ ]  Time zone

[ ]  Default search screen

[ ]  Default template

[ ]  Change their username

[ ]  Set their password

[ ]  None of the above are exemptions – they’re all true

1. True or False: Users can search for information in CRM using any combination of search criteria.

[ ]  True

[ ]  False

1. The \_\_\_\_\_\_\_\_\_\_\_\_\_ symbol in CRM is used as a wildcard when searching and changes the search logic from a ‘begins with’ to ‘contains’.

[ ]  &

[ ]  %

[ ]  #

[ ]  \*

[ ]  @

1. Users can \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and reuse searches from the \_\_\_\_\_\_\_\_\_\_\_\_ screen.

[ ]  Save, Find

[ ]  Delete, Company Summary

[ ]  Enable, Advanced Lookup

[ ]  Prompt, Dashboard

1. The following are actions that one can perform on search screen results, except:

[ ]  Mail merge

[ ]  Territory update

[ ]  Create a task

[ ]  Export to Excel

[ ]  None are exemptions – all are true

1. True or False: Tasks have low/normal/high priorities associated with them.

[ ]  True

[ ]  False

1. The \_\_\_\_\_\_\_\_\_\_\_\_ field on a company designates whether a company is a Prospect or a Customer.

[ ]  Alias

[ ]  Style

[ ]  Type

[ ]  Segment

[ ]  Value

1. When a user creates a task, it then appears on the associated company’s \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_.

[ ]  Communications Tab, their My CRM calendar

[ ]  Notes Record, their My CRM calendar

[ ]  Communications, their My CRM Opportunity Pipeline

[ ]  Dashboard, their user Activity Report

1. True or False: Sales Opportunities can only be created for existing customers. Prospects need to be converted to a customer status before you can start an opportunity.

[ ]  True

[ ]  False

1. A quote can be associated with an Opportunity on the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ tab of the Opportunity record.

[ ]  Documents

[ ]  Library

[ ]  Files

[ ]  Notes

[ ]  Associations

1. True or False: Quotes can only be associated with Customers. Prospects must be converted to customers before they are quoted.

[ ]  True

[ ]  False

1. A Sales \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ describes the process and visual by which a sales person progresses a sales opportunity from inception to completion

[ ]  Pipeline

[ ]  Pyramid

[ ]  Linear Schema

[ ]  Order

1. Outlook integration happens after a supported version of Outlook has been integrated with Sage CRM via the installation of the plugin from the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ portion of CRM.

[ ]  My CRM Preferences Tab

[ ]  Administrative Customization

[ ]  Server Level

[ ]  Information Services

1. True or False: When sending an email from CRM the email is filed automatically in CRM.

[ ]  True

[ ]  False

1. All of the following are true about Sage CRM and Outlook Integration, except:

[ ]  When filing an email the attachments on the email are included if they are above 12KB in size

[ ]  Contacts can be pushed from the address book to CRM

[ ]  Emails are not automatically filed from Outlook to CRM

[ ]  CRM keeps a total and complete copy of the email after it is filed and not a link.