**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.

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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’.

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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.