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**Customer Service Evaluation ANSWER KEY**

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

True

False

1. The top content of the CRM display indicates what the user is focused on and is hyperlinked to the other entities.

True

False

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

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Unlimited

None – Only administrators can create dashboards.

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

Alias

Style

Type

Segment

Value

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

True

False

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: A user can create a case outside of the Company Entity in CRM.

True

False

1. You can get a case by:

Going to your Cases tab in My CRM

Using your recent list.

Going to the Case Search Screen.

Going to the Cases tab on the Company entity.

All of the above

None of the above

1. Cases are a form of:

Trouble ticket

Issue

RMA

Customer problem

All of the above

None of the above

1. True or False: Cases can have a team associated with them.

True

False

1. Cases can be shared amongst CRM users by using:

Cases tab in My CRM

Team CRM

Reports view

Complaint view

Customer Service Homepage

1. True or False: Cases have stages associated with them AND they must have a status.

True

False

1. True or False: Cases remain in the My CRM pipeline (by default) until the stage is marked as Solved.

True

False