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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.

[ ]  20

[ ]  10

[ ]  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’.

[ ]  &

[ ]  %

[ ]  #

[ ]  \*

[ ]  @

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