

QUESTIONS & ANSWERS

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*Oracle Fusion Customer Relationship Management 11g
Sales Essentials*

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QUESTION: 119

A customer has deployed Oracle Fusion Lead Management for their lead management activities. The customer wants to use assessment templates to follow up on qualified leads to gather additional information from customer/prospects, and to provide consistent guidance to sales resources to move the leads further along the sales cycle. What are the three points to be considered while creating the Assessment templates?

- A. Ratings
- B. responses and interactions
- C. questions, question groups and weightages
- D. sales methodology
- E. Task templates

Answer: A, C, E

Explanation:

Assessment templates let you analyze the health of a business object, such as a lead or an opportunity, and suggest appropriate next steps based on its diagnosis. To best plan and create assessment templates, you should consider the following points:

- * Ratings
- * Questions, Question Groups, and Question Weights
- * Responses and Scores
- * Associated Task Templates

Reference:

Oracle Fusion Applications Sales Implementation Guide, Assessment Templates: Points to Consider

QUESTION: 120

Your company currently uses a legacy system, and has a 1:M relationship between opportunity and contacts. Now that your company has purchased Oracle Fusion CRM, you have been asked to import the legacy data. How should the flat file be arranged in order to successfully import all of the legacy data into Oracle Fusion CRM?

- A. Create a data set for each contact and include them all on the same opportunity line.
- B. Create a data set for each contact and include them on different lines; the opportunity data should be included at the beginning of each line.
- C. Create a data set for each contact and include them on different lines; the opportunity data should be included only for the primary contact.
- D. Each set of contact data should be imported from a separate flat file

E. 1:M relationships cannot be directly imported into Oracle Fusion CRM.

Answer: B

QUESTION: 121

Identify three lookup types that are required to manage Oracle Fusion Sales Lead Management?

- A. Manage Lead Status
- B. Manage Time frames
- C. Manage Resource Groups
- D. Manage Ranks
- E. Manage Resources

Answer: A, B, D

Explanation:

Lookups enable quick selection from drop-down menus. Oracle Lead Management lookups are incorporated into its application to speed the process of entering data into forms. Examples of Management lookup name and its associated values and description by lookup type. A: Lead status values based on specific actions performed on a lead. Used to mark the milestones in the lead life cycle. B: Lead Time Frame Lead status values based on specific actions performed on a lead. Used to mark the milestones in the lead life cycle. D: Lead Rank Lead rank values used as a measure of lead quality and prioritization.

Reference:

Oracle Fusion Applications Sales Implementation Guide, Sales Lead Lookups: Explained

QUESTION: 122

While reviewing the legacy data that was exported into a flat file, you realize that there is a certain field that contains irrelevant data. Which method describes how the field is handled during the import process?

- A. Create the custom field in Fusion and map the data to the field, but do not display the field in the GUI.
- B. Select the ignore check box next to the field when you create the mapping.
- C. Click the Delete icon for the field when you create the mapping.
- D. Open the flat file in a text editor, and manually delete the data in each row for the appropriate field.

E. Enter a constant value for the field during the import process.

Answer: B

Explanation:

Source File Options

Map each column that the source file is expected to contain with a specific attribute.

The following table describes the details pertaining to columns provided in the source file: Source Column, Description

* Sequence

The sequence number in which the columns are expected to be provided in the source file. Two rows cannot have the same sequence number.

* Column Name

The column name expected in the source file if a header row is included, or more generic values such as Column A, Column B, and so on, if the header row is not included for Text file types. The tagging structure is represented for XML file types.

Column Width Use when the delimiter value is fixed width for Text file types only.

* Ignore

Ignore the source file column to exclude the data from being imported.

* Required

If selected, a value must exist in the source file or the row will not be imported.

Reference:

Oracle Fusion Applications Sales Implementation Guide, Source File Options

QUESTION: 123

As a sales administrator, you are asked to complete the quota plan for a year. Which batch process should you run to complete the quota plan?

- A. CloseSalesQuotaPlan
- B. DisableSalesQuotaPlan
- C. CompleteSalesQuotaJob
- D. RetireSalesQuotaJob
- E. RetireSalesQuotaPlan

Answer: A

QUESTION: 124

A company wants to use the Assessment template as part of their lead processing. Select the correct sequence of activities of activities for creating the Assessment template in Oracle Fusion Sales.

- A. Enter Assessment Template Details --> Configure Ratings --> Enter Questions and Responses --> Associate Task Templates --> Configure Score Rating attributes--> Edit Questions/ Weights
- B. Edit Questions/ Weights --> Enter Assessment Template Details --> Configure Score Ration attributes --> Enter Questions & Responses --> Associate Task Templates --> Configure Ratings
- C. Enter Assessment Template Details --> Configure Ratings --> Enter Questions & Responses --> Edit Questions/Weights --> Configure Score Rating attributes --> Associate Task Templates
- D. Edit Questions/Weights --> Enter Assessment Template Details --> Enter Questions & Responses --> Configure Score Rating attributes --> Associate Task Templates --> Configure Ratings
- E. Enter Assessment Template Details --> Enter Questions & responses--> Configure Ratings --> Edit Questions / Weights --> Configure Score Rating attribute --> Associate Task Templates

Answer: C

Explanation:

Ratings A rating is a textual qualification such as Excellent. There are three delivered ratings in the assessment template: Excellent, Average, and Poor. Ratings provide a metric other than a numerical score for qualifying the outcome of an assessment. Ratings are created at the beginning of the assessment template creation process (not B, not D, not E). They are later applied to possible responses to questions in the template, which associates each rating with a score. An appropriate feedback will be displayed to you based on the completed assessment score once you submit an assessment. When setting up ratings and applying them to possible responses, it is important to remember that they and their associated feedback text will eventually display as part of the overall assessed health of a business object. Associated Task Templates A task template is an instruction to generate a group of related activities. You can associate task templates with an assessment template in order to recommend tasks that should be performed after an assessment has been done for a business object. When you associate task templates with an assessment template, you can indicate a score range for each task template, and based on the total score of any assessment that uses your template, one or more task templates will be recommended as follow-up activities. In order for a task template to be available to associate with an assessment template, it must be assigned to the same business object type as that assigned to the assessment template, and it must have a subtype of Assessment. Ensure that you have set up task templates correctly before attempting to associate them to assessment templates (not A).

Reference:

Oracle Fusion Applications Sales Implementation Guide, Assessment Templates: Points to Consider

QUESTION: 125

For a sales quota plan, a sales administrator selects a territory quota formula and, seasonality factor group to apply to all territories. However, for one specific territory, the sales administrator selects a different territory quota formula and a seasonality factor group. Which statement is correct?

- A. Territory quota formula and seasonality factor group of a sales quota plan override territory quota plan options.
- B. Only seasonality group of a sales quota plan overrides seasonality factor group of a territory quota plan.
- C. Territory quota formula and seasonality factor group of a territory quota plan override sales quota plan options.
- D. Only territory quota formula of a sales quota plan overrides territory quota formula of a territory quota plan.

Answer: C

Explanation:

Sales Quota Plan A sales quota plan covers a period of one year. The administrator selects territories to include in the quota setting process, and can optionally add territory proposals to allow the setting of quotas for proposed territories. For the sales quota plan options, the administrator selects an adjustment threshold, a territory quota formula, and a seasonality factor group to apply to all territories. Territory options override sales quota plan options. For example, the territory quota formulas and seasonality factor groups selected for individual territories override the formulas selected for all territories.

Reference:

Oracle Fusion Applications Sales Implementation Guide, Sales Quota Plan

QUESTION: 126

You are working as a consultant for a company that is upgrading to Oracle Fusion CRM. Currently, you are configuring the Fusion Assignment Objects. After meeting with the customer, they have decided that they would like the leads assignment object to send leads based on customer size to specific territories. Select the true statement.

- A. This can't be done because assignment objects contain work objects, but not candidate objects.
- B. This can't be done because assignment objects contain candidate objects, but not work objects.

- C. This can't be done because assignment objects can contain candidate objects or work objects, but not both.
- D. This can't be done because assignment objects can contain both candidate objects and work objects, but can't limit by customer size.
- E. This scenario can be successfully created in Oracle Fusion CUM.

Answer: E

Explanation:

Attributes are elements in the view object defined for an assignment object. For each assignment object, you can select one or more attributes that you want to use when configuring assignment rules or mappings. For example, for a work object like sales account, you might choose the attributes of Named Account Flag, Customer Size, and Organization Type.

Note: The work object, candidate object, and attributes are components that fit together to create assignment objects that are used in rule-based and territory-based assignment. Work objects are business objects that require assignment such as leads and opportunities. Candidate objects are business objects such as resources and territories that are assigned to work objects. When you create candidate objects, you can select attributes for them that are later used in rules or mappings. These candidate objects also become candidates that are available for association when you create work objects. When you create work objects, you can select attributes for them also, as well as associating one or more candidates.

Reference:

Oracle Fusion Applications Sales Implementation Guide, How Assignment Object Components Work Together

QUESTION: 127

A Template administrator is creating a new assessment template for capturing assessment data of the sales lead. Identify the three out of the box template types available in Oracle Fusion CRM.

- A. Lead
- B. Opportunity
- C. Opportunity Revenue Line
- D. Customer
- E. Product

Answer: A, B, E

Explanation:

A: Lead assessment templates enable a uniform assessment implementation across leads and provide guidance to sales resources to move the leads further along the sales cycle. Assessment templates enable the analysis and scoring of an opportunity object, such as a product(E), a competitor, or an opportunity(B)overall. After selecting an assessment type, you enter a series of responses to achieve a weighted score. This score then helps determine the success rate of the opportunity

Note: Assessment templates enable you to evaluate the health of a particular business object, such as an opportunity product, an opportunity competitor, or an opportunity overall. An assessment template consists of a set of weighted questions and possible responses that are scored. After selecting the appropriate assessment type, you enter responses for all the questions in an assessment template, and achieve a score once the assessment is submitted. This score is used to evaluate the health of the business object. For example, the score could help determine the success rate of the parent opportunity.

Reference:

Oracle Fusion Applications Sales Implementation Guide, Assessment Templates: Points to Consider

QUESTION: 128

Developer1 and Developer2 work for a large manufacturing company that has recently purchased Fusion. Both developers have been asked to import data from the company's legacy system. Developer1 configures the Opportunity import job while Developer2 configures the Customers import job. During the mapping configuration, Developer 1 selects the Lock check box. Identify the two true statements based on this scenario.

- A. Developer 1 can use and edit the mapping.
- B. Developer1 can use the mapping for import, but cannot edit the mapping.
- C. Developer1 can edit the mapping, but cannot use the mapping for import.
- D. Developer1 cannot use the mapping for import or edit the mapping.
- E. Developer2 can use and edit the mapping.
- F. Developer2 can use the mapping for import, but cannot edit the mapping.
- G. Developer2 can edit the mapping, but cannot use the mapping for import.
- H. Developer2 cannot use the mapping for import or edit the mapping.

Answer: A, F

Explanation:

Lock: If selected, prevents any user, other than the creator of the mapping, from editing the mapping.

Reference:

Oracle Fusion Applications Sales Implementation Guide, Import Options

QUESTION: 129

Identify two activities that the Refresh Forecast process performs during a sales forecast.

- A. updates the latest changes to the territory hierarchy
- B. ensures that the forecasting schedule is generated and has the correct due date
- C. keeps future unfrozen forecast synchronized with the current opportunity data
- D. verifies that the opportunities are present with revenue line Items, and notifies the user if the revenue line items are missing
- E. keeps the forecast items that no longer meet forecast criteria

Answer: B, C

Explanation:

The periodic process Refresh Forecast updates the forecast hierarchy from the territory hierarchy for unfrozen forecasts nightly or as scheduled. When a salesperson's forecast is past due, the periodic synchronization fully updates the next forecast that is now due.

Reference:

OracleFusion Applications Sales Implementation Guide, Run Refresh Forecast Process

QUESTION: 130

You are the CRM administrator of a new project to revitalize the lead Assignment manager rules to ensure the proper sales salesperson is getting assigned based on new geographies and current workloads. Select the three Fusion Assignment Manager components that should be part of your planning process to plan the configuration of Assignment Manager.

- A. Assignment Criteria
- B. Business Objects
- C. Resources
- D. Schedules
- E. Attributes
- F. Dynamic Assignment

Answer: A, C, E

Explanation:

A: Leads can be automatically assigned through Assignment Manager by associating assignment criteria to assignment rules. An assignment rule can have one or more assignment criteria. For example, all leads lower than a certain deal size, and for a specific product are all assigned to a specific Partner resource. Another example of creating an assignment rule might be if you want all leads that are generated based on a specific campaign, such as a CEO round table discussion event, assigned to a specific salesperson. C, E: You can specify assignment rules and rule sets for assignment of resource candidate objects to the lead work object. Assignment Manager uses rules to evaluate and recommend candidate assignments for your specified lead work objects. Assignment rules are created using work objects, candidate objects, attributes, and conditions. You can use multiple types of assignment rules and rule sets for assignment of candidate objects, such as rank, qualification status, and resources, to the lead work object. For example, you can specify the assignment rule that assigns resources to sales leads by assigning individual sales resources that meet the rule criteria.

Reference:

Oracle Fusion Applications Marketing Implementation Guide. Lead Assignment Rules: Explained

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- B. ensures that the forecasting schedule is generated and has the correct due date
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Oracle Fusion Applications Sales Implementation Guide, Run Refresh Forecast Process

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Reference:

Oracle Fusion Applications Marketing Implementation Guide. Lead Assignment Rules: Explained

QUESTION: 133

After successfully performing a test import of customer data, you realize that you have forgotten a key field. Which two steps can be performed to edit the import mapping information?

- A. Navigate to the task: Manage File Import Mappings. Search for the correct mapping and add the new field.
- B. Navigate to the Manage Import Activities dashboard and drill down on the hyperlink in the import activity's Name column. Add the new field.
- C. Navigate to the task: Edit customer Mappings. Search for the correct mapping and add the new Field.
- D. Navigate to the manager import Activities dashboard and drill down on the hyperlink in import mapping column. Add the new field.
- E. Navigate the manage Import Activities dashboard and drill down the hyperlink in the status column. Download the attachment in the mapping column. Edit the attachment by using a text editor. Upload the new mapping.

Answer: B, D

Explanation:

An import mapping, which details the mapping between source file columns and contract attributes, is provided in the Edit Import Activity: Map Fields page for your use, but you can define additional import mappings if required.

Reference:

Oracle Fusion Applications Enterprise Contracts Implementation Guide, Importing Contracts From a Source File

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