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Sales and Marketing**

MB6-285

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QUESTION: 1

When a contact person leaves one of your customers:

- A. Delete the contact person from the system
- B. Create a note in the memo field on the contact person
- C. Replace the former contact person with the new contact person
- D. Mark the contact person as inactive

Answer: D

QUESTION: 2

All mailings sent to a specific business relation can be viewed from:

- A. The Business relations form by clicking the Mailings button
- B. The Mailings form by clicking the Business relation button
- C. The Mailings form selecting the business relation in the filter option
- D. The outbox in Outlook

Answer: A

QUESTION: 3

Where can you get an overview of all activities on a single business relation?

- A. Select Status all in the Workbook form, Open activities tab
- B. View the specific customer in the Management statistics form, Activities category
- C. Open the Business relations form, select a business relation, and click the Activities button
- D. Open the Activities form, right-click on the Business account field of the desired business relation, and choose Filter

Answer: C, D

QUESTION: 4

Which of the following fields require an entry in order to create a business relation?

- A. Name of the business relation
- B. Business Account
- C. Vendor group
- D. Organization number

Answer: B

QUESTION: 5

To view all quotations for a specific prospect, you:

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- A. Open the Quotations form, select a quotation for the prospect, and click the Business relations button
- B. Open the Business relations form, select the prospect, and click the Quotations button
- C. Open the Workbook tab Quotations and filter for the specific prospect
- D. Enter the Management statistics form, select category Business relation and view the quotation

Answer: B

QUESTION: 6

How do you invite a colleague to help you in an activity of type Task?

- A. Create several individual tasks with different responsible persons
- B. Select the task in your Workbook and create a new task and enter the attendees on the Attendee list tab
- C. Use the Attendees field in the Activities form, General tab
- D. Create the activity in your colleague's calendar using the Synchronization function

Answer: A

QUESTION: 7

After having created a customer in the Customer form, who will be assigned as a main contact in the Business relations table?

- A. You need to assign the main contact manually
- B. It depends on who you have selected as a default in the CRM parameters form
- C. It depends on who is selected in the Employee field of the filer in the Business relations form
- D. The current user is assigned

Answer: D

QUESTION: 8

Where do you enter business sectors for a business relation?

- A. In the CRM parameters tab
- B. In the customer group tab
- C. In the Business relation form
- D. In the Customer form

Answer: C

QUESTION: 9

You are planning your schedule for next week.

How do you view all of your appointments for next week at one time?

- A. Step through the days in the Workbook form, Day plan tab
- B. In the Activities form, filter on the date interval in the From/to date fields
- C. View the Activity List tab in the Activities form and select the date of the first day of next week
- D. View the appointments in the Workbook form, Week plan tab

Answer: D

QUESTION: 10

You are a consultant implementing the Sales and Marketing system on an existing Axapta installation. How would you make the existing customers available in the CRM module?

- A. It will be done automatically when entering the Business relation table
- B. By using the Data Export/Import feature on the Administration tab of the Main Menu
- C. By executing the Synchronize CustTable function in the Business relations form
- D. By using the Import function under Periodic, Import

Answer: C

QUESTION: 11

Quotations can be created for:

- A. Customers
- B. Competitors in order to record excluding quotations
- C. Vendors
- D. Customers and prospects

Answer: D

QUESTION: 12

How do you attach a new quotation to a project?

- A. Enter Project, click CRM quotation, and create a new quotation
- B. Create a quotation in the Quotation form and select Functions, Convert to project
- C. Create a quotation in the Quotation form, click the Projects button, and select the project
- D. In the Campaigns form, click Quotations on a campaign that is attached to a project

Answer: A, B

QUESTION: 13

Your customer wants a quotation and asks you to reserve the items. What must be done?

- A. When the item line is created, the items will automatically be reserved
- B. Select Reservation from the Inventory button on the quotation
- C. The Reservation check box in the CRM parameters must be enabled
- D. Convert to a sales order in order to reserve the items

Answer: D

QUESTION: 14

How can you view total invoiced amount on a customer for a specific time interval?

- A. On the Business relations form, click Update financial on the Financials tab, and view the field Total invoiced
- B. Run the report CRM/Reports/Sales Management/Internal account statement
- C. Open Management statistics, Business relation category, select the Specific Customer radio button, and select the respective customer
- D. Select CRM, Inquiries, Statistics

Answer: C

QUESTION: 15

I create a series of quotations for a single customer and I know that only one quotation will be accepted.

How do I make sure that only one of the quotations is used in my statistical tools?

- A. I cancel the excess quotations using the Functions, Set status cancelled button in the Quotations form
- B. I exclude the remaining quotations using a filter on the quotation field type
- C. I enter the remaining quotations on the Competition tab in the Quotation form
- D. I mark the remaining quotations as inactive

Answer: C

QUESTION: 16

To include quotations in Master planning the following information must be entered:

- A. Quotation ID
- B. Probability percentage
- C. Sales order ID
- D. Delivery date

Answer: B

QUESTION: 17

If you wish to create a sales order through the CRM module, you:

- A. Create a new sales order from the Open sales order tab in the Business relations form
- B. Use the function Convert to sales order on an existing quotation
- C. Establish a link from the quotation by clicking on the Sales order button
- D. Change the quotation status to Sales order

Answer: B

QUESTION: 18

Where can you view a sales unit's quarterly key financial indicators?

- A. In the Sales target form
- B. On the Financials tab in the Business relations form
- C. In the Employee form
- D. Under Setup, Sales Management, Sales unit/team

Answer: A

QUESTION: 19

A sales order created in the Sales order form should have been attached to a campaign. How do you correct this?

- A. You click the Functions, Connect to campaign button in the Sales order form
- B. You select the campaign on the General tab in the Sales order form
- C. You delete the first sales order and create a new one through the campaign form
- D. You find the sales order in the Quotations form and select the Campaign ID on the General tab

Answer: B

QUESTION: 20

How do you enter the reason why you either won or lost a given quotation?

- A. Enter the information on the SWOT analysis tab of the Quotations form
- B. Use the Functions, Set reason won/lost button
- C. Enter the information in the field Reason won/lost on the Details tab of the Quotations form
- D. Use the Notes field on the Reason won/lost tab

Answer: C