

Salesforce.com Quiz – April 2013



Welcome to the Cox Sales University Salesforce.com Test.
The entire test should take about 30 Minutes from beginning to end.

The test is **open resource** (book, notes, intranet, etc.) so please refer to any material that you have at your disposal to ensure you answer each question correctly.

You must achieve an **80%** in order to pass this test and achieve **Certification**

- . What is a collection of fields related to a specific item in Salesforce called?
 - A. Related List
 - B. View
 - C. Record
 - D. Detail Page

- . Identify the statement that is true about Salesforce views.
 - Views are only for managers to use.
 - Views are for forecasts.
 - You cannot change views for leads in Salesforce.com.
 - Views are lists of records matching specific criteria.

- . Please name 2 reasons you would want to convert a Lead to an Account?

- . What kinds of activities can be logged in Salesforce?
 - A. Only Phone Calls
 - B. Tasks, Events, Phone Calls, and Emails
 - C. Emails and Phone Calls

- . What is an Opportunity in Salesforce.com?
 - A. The best estimate of how much revenue you can generate in a quarter
 - B. A Potential Revenue generated event
 - C. A person or an organization that may be interested in your services
 - D. Any individual or influencer associated with an account

- . What is the first step to take before entering a lead into Salesforce.com?

- . What happens in Salesforce when you need to convert a Lead into an Account by pushing the Convert Button?
 - A. Salesforce will do all the work, creating a new Account, an Opportunity, and Contact record and transferring all the information from the Lead into the correct fields.

- B. Salesforce creates an Account, Contact, and Opportunity record, but you still need to copy and paste all the information from the Lead record into these new records.
- C. You need to re-type in all the information again, creating an Account, Contact, and Opportunity record from scratch.