

Topic- CRM EDGE

1. What is the full form of CRV in CRM EDGE?

- a) Customer report view
- b) Customer relationship value
- c) Current report version
- d) Current relationship verification
- e) None of the options

Answer **Customer relationship value**

2. Which of the following detail is not available in the home page of customer 360 search in CRM EDGE?

- a) Services Availed
- b) Cross Sell/Up Sell
- c) Deposits
- d) Advances
- e) None of the options

Answer **None of the options**

3. Which of the following statement is false in customer 360 search of CRM EDGE?

- a) Data in CRM EDGE is shown in Transaction + 1 day
- b) Details of Government schemes is available
- c) Details of Non-fund based advances is not available
- d) Whatsapp message in predefined template can be sent to the customer
- e) Lead can be created for an existing customer

Answer **Details of Non-fund based advances is not available**

4. Under customer 360 search in CRM EDGE, which field is not available for searching the customer

- a) Mobile
- b) Name

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- c) E-Mail
- d) customer ID
- e) None of the options

Answer **None of the options**

5. Which project or initiative is not integrated with CRM EDGE?

- a) Union LEAP
- b) Union Connect
- c) Union Phoenix
- d) Union Advith
- e) All the options

Answer **Union Advith**

6. Which are the key criteria in generating the CRV value in CRM EDGE?

- a) Total number of Services availed
- b) Total Deposit
- c) Stress Category
- d) Loan Account
- e) All the options

Answer **All the options**

7. How many fields are Mandatory for creating a Lead in CRM EDGE?

- a) 5
- b) 6
- c) 4
- d) 7
- e) 8

Answer **5**

8. Lead verification can be done using which option in CRM EDGE

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- a) Voter ID
- b) Driving License
- c) CIBIL report
- d) GSTIN
- e) None of the options

Answer **CIBIL report**

9. Which of the following can be fetched on a real time basis in CRM EDGE?

- a) Mini statement
- b) NPA history
- c) Locker rent due
- d) Overdue amount
- e) Accounts linked

Answer **Mini statement**

10. Which of the following is not a mandatory field for creation of LEAD in CRM EDGE?

- a) Last Name/Firm Name
- b) PIN code
- c) Aadhaar
- d) Expected Business
- e) Product

Answer **Aadhaar**

11. CIBIL report generated using CRM EDGE can be accessed under which section?

- a) Notes
- b) Activities
- c) Lead Verification
- d) Attachments
- e) Task

Answer **Attachments**

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12. Who has the final authority to permit rejection of customer complaint in CRM EDGE?

- a) Chief Grievance Officer
- b) Internal Ombudsman
- c) Zonal Grievance Redressal Officer
- d) Regional Grievance Redressal Officer
- e) Branch

Answer **Internal Ombudsman**

13. Which of the following is not a ticket type in CRM EDGE?

- a) Complaint
- b) Query
- c) Service Request
- d) Change request
- e) None of the options

Answer **Change request**

14. What are the options available to Ticket owners during complaint resolution in CRM EDGE?

- a) Close Ticket
- b) Recommended for Rejection
- c) Resolved/Recommended for Closure
- d) Mark as Pending
- e) All the options

Answer **All the options**

15. Which of the following can be a source of complaint in CRM EDGE?

- a) Hard Copies
- b) Social Media
- c) CPGRAMS
- d) Online Grievance Portal
- e) All the options

Answer **All the options**

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16. Who has the ownership for resolution of the complaints in CRM EDGE?

- a) Customer Care Unit
- b) Branches
- c) Digitization
- d) Primary Sharer
- e) Chief Grievance Officer

Answer **Customer Care Unit**

17. Tickers resolved by branch are to be closed by ___ in CRM EDGE

- a) CCU
- b) CGO
- c) ZGRO
- d) RGRO
- e) Branches can close the ticket

Answer **RGRO**

18. Any ticket that is rejected in CRM EDGE should be escalated to Internal Ombudsman within

- a) 10 days
- b) 15 days
- c) 20 days
- d) 25 days
- e) 30 days

Answer **20 days**

19. First level escalation for complaints pertaining to Vertical in CRM EDGE is

- a) CM
- b) AGM
- c) Verticals
- d) GM
- e) None of the options

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Answer **AGM**

20. Who has the responsibility to resolve the complaint within TAT in CRM EDGE

- a) Customer Care Unit
- b) Branches
- c) Verticals
- d) Primary Sharer
- e) Regional office

Answer **Primary Sharer**

21. Which of the following is not a Lead source in CRM EDGE?

- a) ACOE
- b) BC POS
- c) Social Media
- d) STP
- e) None of the options

Answer **None of the options**

22. Lead status in CRM EDGE cannot be one of the following.

- a) Customer Contacted
- b) Call re-schedule
- c) Fraud
- d) Account opened
- e) Awaiting Documents

Answer **Call re-schedule**

23. Which of the following is not an activity in CRM EDGE?

- a) Task
- b) Verification
- c) Meeting
- d) Call

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- e) None of the options

Answer Verification

24. Primary module cannot be _____ during report creation in CRM EDGE

- a) Leads
- b) Customers
- c) Government schemes
- d) Deposits
- e) Tasks

Answer Government schemes

25. Which of the following activity is created in CRM EDGE for implementation of Union Phoenix under Project LEAP?

- a) Tasks
- b) Verification
- c) Meeting
- d) E-MAIL
- e) None of the options

Answer Tasks

26. What are the transition or states available in CRM EDGE for customer relationship officer under Wave 1/ Wave 2 of Union Phoenix?

- a) Contacted - Request Reschedule
- b) Contacted - Not Interested
- c) Balance Increase committed
- d) Not Contacted
- e) All the options

Answer All the options

27. Which menu in Finacle is used for opening accounts using Lead ID?

- a) OLACOPN

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- b) HOAACSB
- c) DMSACOPN
- d) FOAAC
- e) None of the options

Answer **DMSACOPN**

28. Which of the following field has to be mandatorily fed during closure of ticket in CRM EDGE

- a) Closed by PF No.
- b) Name of Official
- c) Mobile Number of Official
- d) Branch/Vertical Name
- e) All the options

Answer **Closed by PF No.**

29. Reminder alert for Tasks in CRM EDGE can be through

- a) Email
- b) Pop-up
- c) SMS
- d) A&B
- e) A&C

Answer **A&B**

30. A prospect is created from source 'Social Media - GBM'. What is the full form of GBM in this context?

- a) Government Business Module
- b) Global Business Management
- c) Global Banking and Markets
- d) Google Business Messages
- e) None of the options

Answer **Google Business Messages**