

Oracle CRM On Demand Administration Essentials NEW

Duration: 4 Days

What you will learn

The course examines the fundamental concepts of Oracle CRM On Demand administrative functionality. It defines the role of the company administrator and includes instruction on administrator tasks and duties. Through a series of hands-on lab exercises, participants learn how to set up, customize, and administer Oracle CRM On Demand for a company.

Practical application of the skills taught in the class is reinforced by hands-on exercises built on real-life implementation scenarios. Starting with a new, default CRM On Demand environment, participants determine business requirements and complete all the customization steps required to get the application up and running for end users. Examples follow recommended implementation practices, allowing students to test new skills in a safe environment with instructor support.

Before the start of the class, students will have to complete the following prework:

Using Oracle CRM On Demand

To access the prework, please follow the steps below:

Go to www.oracle.com and log in

If you don't have an account, click the Register for a free Oracle Web account link on top of the page to create one

After you log in, click the Education link on the right

Click the Knowledge Center link on the left

From the Knowledge Center page, click the Free Trial link on the right

Read the Free Trial Subscription terms and accept

Type the pre-requisite name in the Search box and click Go

Learn To:

Customize the application to meet company-specific business requirements

Define appropriate default settings and password policies for the company

Embed sales methodology into the application to enforce best practices

Set up users in the application and provide them with the appropriate visibility and access to information

Extend the application functionality and perform critical maintenance tasks
Identify the tools and resources available to help administrators be successful

Audience

Business Analysts
Functional Implementer
Project Manager
Technical Consultant

Prerequisites

Suggested Prerequisites

Using Oracle CRM On Demand Webinar (course prework)
Basic Microsoft Windows navigation skills
Basic file-management skills
Familiarity with Web-based applications

Course Objectives

Describe the role of the administrator
Control access to records
Customize fields and page layouts
Configure automatic record assignment rules
Embed your sales methodology in CRM On Demand
Automate actions with workflow rule
Manage users and roles
Manage analytic reports
Use CRM On Demand with other applications
Maintain the application and perform critical maintenance

Course Topics

The Role of the Administrator

Administrator tasks
Administration application pages
Resources and setup templates

Setting Up the Company Defaults and Password Controls

Settings in the company profile
Security settings
Sign in and password controls

Managing Visibility and Access Control

Features that control data visibility and access
Access profiles
Role management
Manager visibility
Setting up users
Flexible data sharing with books of business

Customizing Fields and Page Layouts

- New or modified fields
- Cascading picklists
- Default field values
- Web links
- Detail page and related information section layouts
- Dynamic page layouts
- Homepage layouts
- Search layouts

Extending the Application

- New record types
- Custom Web tabs
- Web applets

Setting Up a Product Catalog and Forecast Schedule

- Products and product categories
- Forecast types
- Forecast schedule setup
- Product revenue forecasts

Assigning Records Automatically

- Automatically assign records
- Assignment rule groups
- Assignment rule criteria
- Assign territories and teams

Embedding Your Sales Methodology

- Sales stages and pipeline reports
- New or modified sales processes
- Sales process coach

Using Workflow Rules to Automate Actions

- Workflow actions and trigger events
- Workflow rules

Managing Access to Reports and Analyses

- Prebuilt and custom analytics
- Visibility to data in reports
- Access controls for reports
- Homepage analyses