Objectifs

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

Participants

Responsables d'applications Analystes Consultant Technique

Prérequis

Cours pré-requis obligatoire(s): Familiarity with Web-based applications Basic Microsoft Windows navigation skills Basic file-management skills

Pédagogie

La pédagogie est basée sur le principe de la dynamique de groupe avec alternance d'apports théoriques, de phases de réflexion collectives et individuelles, d'exercices, d'études de cas et de mises en situations observées. Formation / Action participative et interactive : les participants sont acteurs de leur formation notamment lors des mises en situation car ils s'appuient sur leurs connaissances, les expériences et mettront en oeuvre les nouveaux outils présentés au cours de la session.

Profil de l'intervenant

Consultant-formateur expert sur cette thématique. Suivi des compétences techniques et pédagogiques assurée par nos services.

Moyens techniques

Encadrement complet des stagiaires durant la formation. Espace d'accueil, configuration technique des salles et matériel pédagogique dédié pour les formations en centre. Remise d'une documentation pédagogique papier ou numérique à échéance de la formation.

Méthodes d'évaluation des acquis

Exercices individuels et collectifs durant la formation. Evaluation des acquis et attestation de fin de stage adressés avec la facture.

Programme

Oracle CRM On Demand Administration Essentials

4 jours - 28 heures

Objectifs

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

Participants

Responsables d'applications Analystes Consultant Technique

Prérequis

Cours pré-requis obligatoire(s): Familiarity with Web-based applications Basic Microsoft Windows navigation skills Basic file-management skills

Pédagogie

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 tab Click on Self-Study Online in the left nav Now are you in the Oracle University Knowledge Center Go to the right nav and click the Free Trial link in The Quick Links box Read the Free Trial Subscription terms and accept Type the prework 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

Profil de l'intervenant

Consultant-formateur expert sur cette thématique. Suivi des compétences techniques et pédagogiques assurée par nos services.

Moyens techniques

Encadrement complet des stagiaires durant la formation. Espace d'accueil, configuration technique des salles et matériel pédagogique dédié pour les formations en centre. Remise d'une documentation pédagogique papier ou numérique à échéance de la formation.

Méthodes d'évaluation des acquis

Exercices individuels et collectifs durant la formation. Evaluation des acquis et attestation de fin de stage adressés avec la facture.

Programme

The Role of the Administrator

Administrator tasks

Administration application pages

Resources and setup templates

Managing Access to Reports and Analyses

Prebuilt and custom analytics

Visibility to data in reports

Access controls for reports

Homepage analyses

Performing critical maintenance tasks

Managing users

Updating forecast definitions

Managing records and data quality

Monitoring alerts

Testing new features

Understanding environments

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 pick lists

Default field values

Web links

Detail page and related information section layouts

Dynamic page layouts

Homepage, Search, Action Bar, and Convert Lead 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

Opportunity 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

Workflow monitoring

1218