

ORACLE CRM ON DEMAND ADMINISTRATION ESSENTIALS



THE WORLDS MOST
COMPREHENSIVE CRM ON
DEMAND SOLUTION

- Easy to use
- Fast to deploy
- Powerful analytics
- Built-in contact center
- Prebuilt industry solutions
- Embedded marketing, sales, and service best practices

Oracle's Oracle CRM On Demand is designed to drive sales, marketing, and service success, delivering material value to organizations of all types and sizes. However, while many of your company's employees will use and benefit from the service, it may be managed and maintained by a few critical administrators. The Oracle CRM On Demand Administration Essentials course provides hands-on practice with real-life implementation scenarios, arming your administrative staff with the knowledge to customize and manage the application, giving your end users better tools to do their jobs, and enabling your company to evolve and grow.

Streamline deployment

Getting deployments off on the right foot is critical to create momentum, encourage end-user adoption, and rapidly benefit from Oracle CRM On Demand. To do that, your system must be properly configured to accurately reflect your organization's business processes.

Administrators learn exactly the steps needed to do just that in the Oracle CRM On Demand Administration Essentials course. With the fundamental knowledge in hand, they gain critical insight into how to configure the application so that employees at your organization gain fast access to the CRM functionality necessary for them to perform their responsibilities.

Embed your organization's sales methodology

Driving productivity is on the top of every sales manager's mind. Leveraging effective sales tools and processes can yield higher revenue per salesperson.

The Administration Essentials course provides instruction on using the CRM On Demand Sales Process Coach to set up your company's proven sales methodologies to replicate winning sales approaches across your entire sales organization.

Increase productivity through automation

Although Oracle CRM On Demand generates value on many fronts, automating sales and service processes is a foundational feature that can generate significant benefits to your organization.

In this course, your administrators will learn how to create record assignment rules to define responsibility for customer data and how to establish workflow rules to automatically set up tasks, generate email notifications, and update records. Web-

KEY FEATURES

KEY TOPICS:

- The role of the administrator
- Managing users and roles
- Controlling data access and visibility
- Configuring automatic record assignment rules
- Customizing fields and page layouts
- Embedding sales methodologies
- Automating through workflows
- Managing analytic reports
- Integrating with other applications
- Critical maintenance

FREE RESOURCES WITH EVERY SUBSCRIPTION

- On-line tour for new users
- Webinars
- Rollout guides
- Knowledge library

PUBLIC TRAINING

- Data import workshop
- Advanced analytics workshop

CUSTOM TRAINING

- Web training
- On-site training
- Train-the-Trainer

sourced leads can be automatically assigned to sales representatives, follow-up tasks generated, and alert notifications sent, greatly increasing user productivity.

Design in usability—customize and extend Oracle CRM On Demand

User adoption is critical for all successful CRM deployments. And while end-user education is an important component of system usage, training your system administration staff to configure a user-friendly and more efficient system interface and process flow is equally important.

In this course, administrators will learn how to customize field, page, and search layouts, making users comfortable navigating through Oracle CRM On Demand, encouraging usage and increasing their productivity. Administrators will also learn to extend the application by setting up custom record types, creating custom Web tabs, and Web sections. By customizing and extending the application, administrators can ensure the service captures your critical data elements and reflects your business processes.

Secure your data

Keeping confidential customer data and competitive intelligence secure is critical to business success. The Administration Essentials course focuses heavily on securing your organization's data. Administrators will learn to configure the system to control visibility and access to processes, features, and sensitive data, not only at the individual user level, but also at the team and organizational level. And administrators will know how to maintain these controls in the face of more complex processes and organizational structures that your company might require in the future.

Fine tune for continual benefits

As companies grow, systems must adapt to meet changing business requirements. Administrator education is crucial to enabling these transformations. This course will provide best practices on how to modify and maintain company and user information, leverage application utilities, and keep your service aligned with your organization's business requirements and processes as they evolve over time.

For more information

To sign up for technical classes, click the Training & Support link from within Oracle CRM On Demand, visit Oracle University at education.oracle.com, or call +1.866.906.7878.

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