

# Oracle - Oracle CRM On Demand Administration Essentials (Training On Demand)

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**Code:** D78258GC40  
**URL:** [View Online](#)

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No lab environment for the On Demand format.

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](http://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

## Skills Gained

- 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
- Control access to records
- Describe the role of the administrator

## **Prerequisites**

- Basic Microsoft Windows navigation skills
- Familiarity with Web-based applications
- Basic file-management skills

## **Course Details**

### **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 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

## **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
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