Oracle Fusion CRM 11g Sales Essentials
Exam Study Guide

Jenny Law
Senior Manager
WWA&C Partner Enablement
Objective & Audience

Objective
This guide is designed to help you prepare for the Oracle Fusion Customer Relationship Management 11g Sales Essentials (1Z1-456) exam by providing links to study resources.

Targeted Audience

- Implementation Consultants
- Strongly recommended the individual be Certified or Specialized in a Fusion or non-Fusion CRM area
- New to Fusion product family but deep experience in at least one other Oracle product family in the CRM area
- Deep knowledge of general Sales practices and regulations (multiple geographies)
- Up-to-date training and field experience are recommended
Exam Topics & Objectives

Exam Topics
The Oracle Fusion CRM 11g Sales Essentials exam consists of eight topics:

1. Common CRM Configuration
2. Lead Management
3. Opportunity Management
4. Forecasting
5. Territory Management
6. Quota Management
7. Data Import/Export
8. Define Extensions for Sales

Exam Objectives
The exam objectives are defined by learner or practitioner level of knowledge:

Learner-level: Learner items test foundational grasp and require comprehension (not recognition or memorization)

Practitioner-level: Practitioner items present on-the-job scenarios and require the ability to integrate and apply knowledge in new contexts, analyze, troubleshoot, and solve problems.
Training Options

On the following slides, course options for each exam topic have been defined. Please note that not all training options are available for all exam topics. Additional choices may be developed over time.

• **Instructor-Led or Live Virtual Training (delivered by Oracle University)**
  Partners can take any publicly-scheduled Oracle University courses at a discount. Benefit from hands on experience to gain working skill sand work towards OPN Specialization.

• **Online Training**
  Oracle Partners are entitled free access to the Oracle Knowledge Center (OUKC), a vast library of recorded product courses. New courses are regularly added to the library, providing partners with the latest information and training to master new products or to increase proficiency on the new releases.

• **On Demand Training**
  Oracle Training on Demand is classroom content delivered via high definition video classes over the internet. These classes feature full length lecture, white board and demonstration. Classes follow the recommended flow of the classroom material, or participants can play, and replay, segments in any order. Classes are closed caption and allow for word search of the scripted material. All courses include downloadable course manual (eKit) and bonus material.
**Topic 1: Common CRM Configuration**

**Objectives**
- Define Organization and Accounts  
  **Level:** Practitioner
- Define Products and Sales Catalogs  
  **Level:** Practitioner
- Configure Assignment Manager  
  **Level:** Practitioner
- Define Roles and Visibility  
  **Level:** Practitioner

**Training Options**
- **Instructor-Led Training (delivered by Oracle University)**
  - Fusion Applications: CRM Implementation
- **Online Training**
  **Please Note:** View [this slide](#) prior to viewing the online courses
  - Fusion 11gR1 (11.1.1.5.0) TOI: Common CRM - Applications Common Components
  - Fusion 11gR1 (11.1.1.5.0) TOI: Common CRM - Assignment Manager
  - Fusion 11gR1 (11.1.1.5.0) TOI: Set Up Sales - Define Sales Catalogs
  - Fusion Applications Deep Dive: Implementation and Configuration Considerations - Customer Relationship Management: Common Components
  - Fusion Applications Deep Dive: Implementation and Configuration Considerations - Customer Relationship Management: Sales Catalog
  - Fusion Applications Deep Dive: Implementation and Configuration Considerations - Customer Relationship Management: Assignment Manager

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Topic 2: Lead Management

Objectives
- Describe Assignment Manager for Lead Processing
- Configure Assessment Reference Data for Sales Leads
- Configure Sales Leads

Level
- Learner
- Practitioner

Training Options
- Instructor-Led Training (delivered by Oracle University)
  - Fusion Applications: CRM Implementation
- Online Training
  - Please Note: View this slide prior to viewing the online courses
  - Fusion 11gR1 (11.1.1.5.0) TOI: Manage Leads
  - Fusion 11gR1 (11.1.1.5.0) TOI: Manage Leads - Follow Up Leads
  - Fusion 11gR1 (11.1.1.5.0) TOI: Manage Leads - Process Leads
  - Fusion 11gR1 (11.1.1.5.0) TOI: Manage Leads - Register and Approve Leads
  - Fusion Applications Deep Dive: Implementation and Configuration Considerations - Customer Relationship Management: Assignment Manager
  - Fusion Applications Deep Dive: Implementation and Configuration Considerations - Customer Relationship Management: Lead Management
Topic 3: Opportunity Management

Objectives

- Describe Sales Methods
- Configure Opportunity Management
- Define References and Competitors

Level

- Learner
- Practitioner

Training Options

- Instructor-Led Training (delivered by Oracle University)
  - Fusion Applications: CRM Implementation

Online Training

**Please Note:** View this slide prior to viewing the online courses

- Fusion 11gR1 (11.1.1.5.0) TOI: Pursue Leads and Opportunities - Assess Opportunity
- Fusion 11gR1 (11.1.1.5.0) TOI: Pursue Leads and Opportunities - Leverage Sales References
- Fusion 11gR1 (11.1.1.5.0) TOI: Pursue Leads and Opportunities - Manage Opportunities
- Fusion 11gR1 (11.1.1.5.0) TOI: Pursue Leads and Opportunities - Manage Sales Activities
- Fusion 11gR1 (11.1.1.5.0) TOI: Pursue Leads and Opportunities - Manage Sales Competitive Information
- Fusion 11gR1 (11.1.1.5.0) TOI: Pursue Leads and Opportunities - Manage Sales Revenue - Browse Sales Catalog
- Fusion 11gR1 (11.1.1.5.0) TOI: Pursue Leads and Opportunities - Manage Sales Revenue
- Fusion Applications Deep Dive: Implementation and Configuration Considerations - Customer Relationship Management: Opportunity Management
**Topic 4: Forecasting**

**Objectives**
- Describe Forecasting Options
- Define Lookups, Profile Options, and Configuration Activity
- Run Forecast Processes

**Level**
- Learner
- Practitioner

**Training Options**
- Instructor-Led Training (delivered by Oracle University)
  - Fusion Applications: CRM Implementation
- Online Training
  - Please Note: View this slide prior to viewing the on line courses
  - Fusion 11gR1 (11.1.1.5.0) TOI: Manage Sales Planning and Forecasting
  - Fusion Applications Deep Dive: Implementation and Configuration Considerations - Customer Relationship Management: Sales Forecasting

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Topic 5: Territory Management

Objectives
• Describe Lookups, Profile Options, and Dimensions
• Manage Synchronization and Schedulable Processes
• Define Configuration Activity
• Define Sales Territories

Level
Learner
Practitioner
Practitioner
Practitioner

Training Options
• Instructor-Led Training (delivered by Oracle University)
  – Fusion Applications: CRM Implementation

• Online Training
  Please Note: View this slide prior to viewing the online courses
  – Fusion 11gR1 (11.1.1.5.0) TOI: Manage Sales Territories - Maintain Sales Territories
  – Fusion Applications Deep Dive: Implementation and Configuration Considerations - Customer Relationship Management: Territory Management
# Topic 6: Quota Management

## Objectives
- Describe Lookups  
  - Learner
- Manage Formulas and Plans  
  - Practitioner
- Run Batch Processes  
  - Practitioner

## Training Options
- Instructor-Led Training (delivered by Oracle University)
  - Fusion Applications: CRM Implementation
- Online Training
  - **Please Note:** View this slide prior to viewing the on line courses
  - Fusion Applications Deep Dive: Implementation and Configuration Considerations - Customer Relationship Management: Quota Management
Topic 7: Data Import/Export

Objectives

- Map Import/Export
- Run Import/Export

Training Options

- Instructor-Led Training (delivered by Oracle University)
  - Fusion Applications: CRM Implementation
Topic 8: Define Extensions for Sales

Objectives

• Describe Customization using Oracle Composer
• Define and Extend Custom Fields and Pages

Training Options

• Instructor-Led Training (delivered by Oracle University)
  – Fusion Applications: CRM Implementation
  – Fusion Applications: Extend Oracle Fusion CRM with Composers
Exam Registration

• **How to register for the exam?**
  You can register for all Oracle certification exams with Pearson VUE. Before a registration can be submitted, a Pearson VUE profile must be created using your Company ID. Your Company ID can be obtained by contacting your local Oracle Partner Business Center or by signing in to your OPN account. Your Company ID is located in the section on the right under "Company information".

  Please follow [these instructions](#) in order to properly set-up your Pearson VUE account for the first time.

• **Have you completed an Oracle Certification Exam in the past?**
  Due to systems enhancements, each partner who has completed an Oracle Certification Exam will need to update their Pearson VUE profile in order to receive credit and for those records to appear in the [OPN Competency Center](#).

• **How to get full recognition as Certified Implementation Specialist?**
  To get full recognition as a Certified Implementation Specialist you need to:
  A. Update your Pearson VUE profile with your Company ID
  B. Activate your Certview Account

  Please follow [these instructions](#) and your records will be properly recorded.
On Line Courses in iLearning

Some on line Oracle Fusion courses have long names and therefore, the Enroll button may be to the far right.

To view the course, please scroll to the right and click the enroll button.

Specializations Exams

- Specializations exams are meant to be challenging and test participants on all facets of the product.
- Some of the knowledge required to pass the exam may be learned in a classroom setting, while some knowledge must be learned through hands on experience.
- The courses presented in this document may or may not cover every objective to the level of depth that is presented in the Specialization exam.