Oracle CRM On Demand Essentials – Exam Study Guide

The Oracle CRM On Demand Essentials Exam Study Guide is designed to highlight the training options mapped to each exam topic to guide students in their preparation to pass the Oracle CRM On Demand Essentials Exam (1Z0-527).

The exam objectives are defined by learner or practitioner level of knowledge.

Learner-level: questions require the candidate to recall information to derive the correct answer
Practitioner-level: questions require the candidate to derive the correct answer from an application of their knowledge

For each exam topic there have been identified alternative training options that are available at Oracle. Please note that some of the training recommended can cover multiple exam topics.

The exam covers 18 topics:

Topic 1: Introduction to the Company Administrator Role

Objectives
- Define the role of the Oracle CRM On Demand Administrator
- Locate the resources available for Administrators
- Navigate to the administration pages in the application

Level
- Learner

Training Options
- Instructor Led Training (delivered by Oracle University)
  - Oracle CRM On Demand Administration Essentials LWC
- Online Training
  - Oracle CRM On Demand Administrator Rollout Guide

Topic 2: Company Administration

Objectives
- Update the company profile and explain the effects of company default settings
- Identify the default settings that can be changed in a user’s personal profile
- Define Password and Security Controls
- Set up additional languages and currencies
- Post a My Homepage alert
- Monitor user sign-in and other user activity

Level
- Learner
- Learner
- Learner
- Practitioner
- Practitioner
Training Options

- Instructor Led Training (delivered by Oracle University)
  - Oracle CRM On Demand Administration Essentials LWC
- Online Training
  - Oracle CRM On Demand Webinar: Using Oracle CRM On Demand Ed 1 RWS

**Topic 3: Visibility and Access Control**

**Objectives**
Identify the features that control visibility and data access

**Level**
Learner

**Training Options**

- Instructor Led Training (delivered by Oracle University)
  - Oracle CRM On Demand Administration Essentials LWC
- Online Training
  - Oracle CRM On Demand Webinar: Consulting Best Practices for Access and Visibility

**Topic 4: Manager Visibility**

**Objectives**
Define what is meant by a manager visibility structure and explain how it affects data access

**Level**
Learner

**Training Options**

- Instructor Led Training (delivered by Oracle University)
  - Oracle CRM On Demand Administration Essentials LWC
- Online Training
  - Oracle CRM On Demand Webinar: Understanding Data Access and Visibility Control

**Topic 5: Role Setup**

**Objectives**
Modify access profiles to control specific access rights to records
Copy, edit, and create roles to satisfy business requirements
Define Access for Related Information

**Level**
Practitioner
Practitioner
Learner

**Training Options**

- Instructor Led Training (delivered by Oracle University)
  - Oracle CRM On Demand Administration Essentials LWC
- Online Training
  - Oracle CRM On Demand Administrator Rollout Guide
### Topic 6: User Setup

**Objectives**
- Create users with the correct roles and reporting assignments
- Set up a sales quota for a user
- Define Sales Quotas for Users

**Level**
- Practitioner

**Training Options**
- Instructor Led Training (delivered by Oracle University)
  - [Oracle CRM On Demand Administration Essentials LWC](#)

### Topic 7: Books of Business

**Objectives**
- Describe the Book of Business feature and why you use it
- Set up a book of business hierarchy
- Give users access to books, and update roles and access profiles
- Display and use the Book Selector
- Add records to books

**Level**
- Learner
- Practitioner

**Training Options**
- Instructor Led Training (delivered by Oracle University)
  - [Oracle CRM On Demand Administration Essentials LWC](#)
- Online Training
  - [Oracle CRM On Demand Webinar: Flexible Data Sharing Using Book of Business](#)

### Topic 8: Customizing Fields

**Objectives**
- Document required customizations to fields
- Create custom fields and re-label existing fields
- Add or change picklist values
- Set up cascading picklists
- Configure field validation rules
- Map lead conversion fields

**Level**
- Learner
- Practitioner

**Training Options**
- Instructor Led Training (delivered by Oracle University)
  - [Oracle CRM On Demand Administration Essentials LWC](#)
- Online Training
  - [Oracle CRM On Demand Webinar: Customizing Fields](#)
Topic 9: Customizing Page Layouts

Objectives

- Describe how user roles affect page layouts
- Create a static page layout
- Create a related information layout
- Create a dynamic page layout
- Create Search, Homepage, and Lead Conversion layouts
- Organize homepage lists
- Customize audit trails
- Update roles to use the new layouts

Level

- Learner
- Learner
- Learner
- Practitioner
- Practitioner
- Practitioner
- Practitioner

Training Options

- Instructor Led Training (delivered by Oracle University)
  - Oracle CRM On Demand Administration Essentials LWC
- Online Training
  - Oracle CRM On Demand Webinar: Customizing Pages

Topic 10: Extending the Application

Objectives

- Create a custom Web applet
- Create a custom Web tab
- Set up a Custom object

Level

- Practitioner
- Practitioner
- Practitioner

Training Options

- Instructor Led Training (delivered by Oracle University)
  - Oracle CRM On Demand Administration Essentials LWC

Topic 11: Product Administration

Objectives

- Create product categories and product lists
- Customize product, asset, revenue, and opportunity product record types
- Control which products can be associated with opportunities
- Describe the relationship between products and assets
- Set up products to enable product revenue forecasting

Level

- Learner
- Practitioner
- Learner
- Practitioner
- Practitioner

Training Options

- Instructor Led Training (delivered by Oracle University)
  - Oracle CRM On Demand Administration Essentials LWC
 Topic 12: Forecast Administration

Objectives
- Differentiate among the different forecasting options
- Set up a forecast schedule
- Add participants to a forecast
- Describe the effect of user roles and reporting structure on forecasts
- Update and maintain forecasts

Level
- Learner
- Learner
- Practitioner
- Practitioner

Training Options
- Instructor Led Training (delivered by Oracle University)
  - Oracle CRM On Demand Administration Essentials LWC
- Online Training
  - CRM On Demand Release 17 TOI: Forecasting Functional Overview

Topic 13: Creating Assignment Rules

Objectives
- Use templates to document assignment requirements
- Describe how CRM On Demand evaluates assignment rules in an assignment rule group
- Create assignment rule groups, rules, and rule criteria
- Create territories and assign records to territories
- Create account and opportunity teams automatically

Level
- Learner
- Learner
- Practitioner
- Practitioner

Training Options
- Instructor Led Training (delivered by Oracle University)
  - Oracle CRM On Demand Administration Essentials LWC
- Online Training
  - CRM On Demand Webinar: Effectively Defining and Implementing Assignment Rules

Topic 14: Team Sharing

Objectives
- Describe how team record-sharing is used
- Define delegated users

Level
- Learner
- Learner

Training Options
- Instructor Led Training (delivered by Oracle University)
  - Oracle CRM On Demand Administration Essentials LWC
- Online Training
  - Oracle CRM On Demand Webinar: Understanding Data Access and Visibility Control
**Topic 15: Creating Workflow**

**Objectives**
- Understand how to use workflow actions
- Understand basic workflow features and limitations
- Workflow conditions and syntax

**Level**
- Practitioner
- Learner

**Training Options**
- Instructor Led Training (delivered by Oracle University)
  - Oracle CRM On Demand Administration Essentials LWC
- Online Training
  - Oracle CRM On Demand Webinar: Creating Workflows

**Topic 16: Reports and Analytics**

**Objectives**
- Manage access to reports
- Set up visibility to data in reports
- Create reports with table, chart, and pivot table views
- Use appropriate filters when creating reports
- Use the appropriate subject area type to create a report
- Apply best practices when creating custom reports

**Level**
- Learner
- Practitioner

**Training Options**
- Instructor Led Training (delivered by Oracle University)
  - Oracle CRM On Demand Administration Essentials LWC
  - Oracle CRM On Demand Advanced Analytics Workshop LWC
- Online Training
  - Oracle CRM On Demand Webinar: Build Reports: 1. Control Visibility
  - Oracle CRM On Demand Webinar: Build Your Own Reports: 2 Create List Reports
  - Oracle CRM On Demand Webinar: Build Your Own Reports: 3 Format Custom Reports Ed 1
  - Oracle CRM On Demand Webinar: Build Your Own Reports: 4 Create Charts for Reports
  - Oracle CRM On Demand Webinar: Build Your Own Reports: 5 Create Pivot Tables for Reports
  - Oracle CRM On Demand Webinar: Build Your Own Reports: 6 Control Access to Reports

**Topic 17: Dashboards**

**Objectives**
- Identify the components of a dashboard
- Identify appropriate business requirements for creating a custom dashboard

**Level**
- Learner
- Practitioner
Create a custom dashboard
Create a dashboard prompt
Apply best practices when creating a dashboard

Training Options

- Instructor Led Training (delivered by Oracle University)
  - Oracle CRM On Demand Administration Essentials LWC
  - Oracle CRM On Demand Advanced Analytics Workshop LWC
- Online Training
  - Oracle CRM On Demand Webinar: Creating Custom Dashboards

Topic 18: Data Import

Objectives

| Use the appropriate method of importing data to meet business requirements | Learner |
| Consider import size and data storage limits when importing data | Learner |
| Use the correct methods and fields to check for duplicate records during import | Learner |
| Create record relationships between imported records | Learner |
| Apply best practices when importing data | Practitioner |
| Perform an import using the Import Assistant | Learner |
| Verify and troubleshoot imported data | Practitioner |
| Explain how import activities fit into the implementation timeline | Practitioner |

Training Options

- Instructor Led Training (delivered by Oracle University)
  - Oracle CRM On Demand Administration Essentials LWC
  - Oracle CRM On Demand Data Import Workshop - LWC
- Online Training
  - Oracle CRM On Demand Webinar: Consulting Best Practices for Data Import
  - Oracle CRM On Demand Webinar: Importing Your Data - Part 1
  - Oracle CRM On Demand Webinar: Importing Your Data - Part 2