ORACLE DATA SHEET

ORACLE CRM ON DEMAND ADMINISTRATION ESSENTIALS

ORACLE
CRM ON DEMAND

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.

THE WORLD'S MOST COMPREHENSIVE CRM ON DEMAND SOLUTION

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

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 configured properly 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 set up

KEY FEATURES

ORACLE

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

- Online 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

tasks automatically, generate email notifications, and update records. Web-sourced leads can be assigned automatically 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 fields and page 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. Moreover, 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.

ORACLE

CONNECT WITH US

blogs.oracle.com/oracle
facebook.com/oracle
twitter.com/oracle
oracle.com

CONTACT US

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 +1.800.ORACLE1 to speak to an Oracle representative.

Integrated Cloud Applications & Platform Services

Copyright © 2021, Oracle and/or its affiliates. All rights reserved. This document is provided for information purposes only, and the contents hereof are subject to change without notice. This document is not warranted to be error-free, nor subject to any other warranties or conditions, whether expressed orally or implied in law, including implied warranties and conditions of merchantability or fitness for a particular purpose. We specifically disclaim any liability with respect to this document, and no contractual obligations are formed either directly or indirectly by this document. This document may not be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without our prior written permission.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

Oracle is committed to developing practices and products that help protect the environment