ORACLE CRM Online training Contents

ORACLE APPS CRM ONLINE TRAINING

ORACLE APPS CRM COURSE CONTENT

INTRODUCTION TO ORACLE CRM SERVICE FUNDAMENTALS

Understand iStore's shopping cart and ordering functionality and other key features

Understand features of Oracle's sales applications

Create leads and convert them into opportunities

Create opportunities and convert them into quotes

Describe Campaign Flows, schedules and target groups

Under geographic territories and named territories, set up in Territory Manager

Explain the Basic Sales Flow

Set up common components, such as Notes, Tasks and Calendars

Describe the Lead to Order Process

Create Customers and Contacts using Oracle trading Community Architecture model

Create Employees and Users, Import Resources, and assign roles and responsibilities to users

Understand implementation steps required to set up sales products

Describe integration points between Oracle Sales and Oracle Marketing applications

Understand Global Address formatting

Understand Oracle Sales related personalization features available in OA Framework

Create proposals for leads, opportunities or quotes

OVERVIEW OF LEAD TO ORDER PROCESS

Describe E-Business suite

Associate job roles with the basic sales flow

Describe customer types

Describe the lead to order processv

OVERVIEW OF SALES PRODUCTS

Describe Oracle sales products like Sales, Telesales, Quoting, Proposals, Territory Manager, iStore, Incentive Compensation, and Sales Offline

Describe setups to make Oracle Telesales and Oracle Sales interoperable

Explain the differences between Oracle Telesales and Oracle Sales

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DEPENDENCIES

List mandatory dependencies for a sales implementation

List some optional dependencies

List Accounting sales-related setups

Define the Advanced Product Catalog

Describe integration between Oracle Sales applications and Oracle Marketing

ORACLE COMMON APPLICATION COMPONENTS: NOTES, TASKS AND CALENDAR

Describe Oracle Notes

Set up Oracle HTML Notes

Describe Oracle Task Manager

Set up Oracle HTML Task Manager

Describe Oracle Calendar

Set up Oracle HTML Calendar

RESOURCE MANAGER

Identify the setups for Resource Manager

Describe implementation consideration for Resource Manager

Describe how to implement Resource Manager in Forms

Explain how implement Resource Manager in HTML

CUSTOMERS

Explain the Oracle Trading Community Architecture (TCA) model

Define the features that enable you to enter and maintain customer and contact information

Set up party classification

Understand global address formatting and validation

Merge parties or customer accounts

CRM APPLICATION FOUNDATION: TERRITORY MANAGER

Describe Territory Manager

Create geographic territories

Create named account territories

Set up Territory Assignment Program

SALES CAMPAIGNS

Define campaign terminology

Describe the sales campaign flow

Create a sales campaign schedule

Create a target group

LEAD MANAGEMENT

Define Lead Management

Explain lead related setups

Create a lead

Discuss how leads are qualified, ranked, and assigned

Convert a lead to an opportunity

Identify how to accept, decline, or reassign a lead

OPPORTUNITY MANAGEMENT IN ORACLE SALES

Define opportunity management and its functions

Explain opportunity related setups

Create an opportunity from a sales lead

Create an opportunity without a sales lead

OA FRAMEWORK PERSONALIZATION IN ORACLE SALES

Personalize the Oracle Sales user interface, search region, sales funnel, and home page

Publish saved searches

Manage saved searches and reports

Describe report personalization features

FORECASTING IN ORACLE SALES

Describe the forecasting process

Define forecasting terminology

Explain forecast related setups

Create Product Category worksheet

Generate forecasts

Review forecast history

Set forecasting profile options

ORACLE PROPOSALS

Describe Oracle Proposal application

Describe some key features

Define key elements of a proposal

Identify applications that integrate with Oracle Proposals

List high-level implementation steps

Create a proposal from a lead, an opportunity, a customer, a quote, or as a standalone document

Describe how to generate a proposal version

SALES CONTRACTS IN QUOTING

Describe the benefits of Sales Contracts in Oracle Quoting

Print a quote with contract terms

Enable Oracle Sales Contracts functionality for Oracle Quoting

Negotiate contract terms for a quote

QUOTING

Describe the Oracle Quoting application

Describe some key features

List Oracle Quoting user interfaces (UIs)

Describe mandatory dependencies

List common Oracle Quoting integrations with other Oracle applications

List high-level implementation steps

Create a quote

ORACLE ISTORE

Describe the Oracle iStore application and list some key features and benefits

List common iStore integrations with other Oracle applications

List high-level setup steps

Explain basic shopping cart and ordering functionality

Describe how to register iStore users

Define DBI for iStore

SALES OFFLINE

Discuss key benefits of Oracle Sales Offline

Set Sales Offline profile options

Customize menus and descriptive flex fields

Understand the Sales Offline architecture

Explain synchronization types and preferences

Discuss versioning and template identification

Describe product dependencies and major integration points

DAILY BUSINESS INTELLIGENCE: ORACLE SALES AND ORACLE QUOTING

List Oracle Daily Business Intelligence (DBI) key features

Describe DBI for Sales and DBI for Quoting

Explain DBI for Sales and DBI for Quoting key performance indicators

List setup steps for Sales and Quoting DBI applications