

Oracle CRM On Demand Administration Essentials

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