

## G410 - 11i CRM Functional Foundation

### Course Objectives

Oracle CRM Systems is the family name for an integrated group of applications that support the management of customers and people.

This training programme has been designed to introduce users of the application to the full functionality of the module and to provide hands-on experience and tutoring of its application and use.

Who Should Attend	Prerequisites	Duration
CRM Consultants	None	5 Days
CRM Users		
CRM Super Users		

### Course Contents

#### Topics include:

#### CRM Functional Setup

Oracle Service and Support – Overview  
 Defining a CRM Strategy  
 CRM – the entire organisation  
 CRM Models of Control  
 Support Systems  
 Service Systems  
 Management and Control  
 CRM Service Processes  
 Change Management  
 Strategies

The Customer Organisation  
 Customer Information  
 People Information  
 Contact Management  
 Data Loaders  
 Contact Centre  
 Contact Control  
 Contact Histories  
 Notes and Information Storage  
 Retrieval Methods and Access

Interaction Centre  
 Customer Design and Configuration Methods  
 Interaction Histories

Sales Management  
 Handling the Sales Control Flow  
 Salespeople and Territories

Sales Management and Lead Integration  
 Funnel Management  
 Funnel Reporting  
 Marketing Campaigns  
 Managing Events  
 Controlling Leads  
 Territories and Management  
 Online Facilities for Sale and Marketing  
 Web Marketing and Portals

Service Requests  
 Service Request Management  
 Request Types and Processes  
 Service Level Agreements  
 Complete CRM Data Sets  
 Using the Interaction Centre  
 Request Management  
 Request Control  
 Service Managers  
 Service Users  
 Service Differentiation

Request Monitoring  
 Request Maintenance  
 Planning  
 CRM Control Structures

#### CRM Technical Setup

System Administration  
 Customise the CRM Application  
 Imposing limits on what users can access through menus,

security profiles, and responsibilities  
 Assign Responsibilities to Users or Groups  
 Defining Audit Requirements  
 Setting Up User Profiles  
 Defining the formats for displaying customer information  
 Setting Up and Maintaining Quick Code types and values  
 Installing printers and Managing concurrent processing

CRM Reports and Inquiries  
 Customising Windows and Menus

Quick Codes and User Tables  
 Adding Quick Code Values  
 Removing Quick Code Values  
 Defining Quick Code Types  
 User and Extensible Quick Codes

Integrating With Other Systems  
 Security  
 Audit Trail  
 Default Menus  
 CRM Key and Descriptive Flexfields