

G420 - 11i Sales Functional Configuration

Course Objectives

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

This practical hands-on course is designed to introduce the configuration controls associated with the set-up and implementation of Oracle 11i Sales.

The course provides detailed exposure to the set-up elements of the system together with practical analysis of the implications and requirements of differing configuration models than can be implemented using Oracle 11i.

Who Should Attend	Prerequisites	Duration
CRM Consultants	Business Knowledge of the Customer Relationship Management and the Sales Process Cycle	2 Days
CRM Users		
CRM Super Users	Should have attended an Oracle Navigation Course	

Course Contents

Introduction

Oracle 11i Methodologies
 Hardware
 Software
 Data
 Customers
 Procedures
 Project Implementation
 Methodology

Concepts

Overview of CRM Cycle
 Oracle E-Business Suite 11i
 Integration
 Oracle Glossary

Sales Overview

The Sales Lifecycle
 Managing Customers
 Sales Interaction
 Pipelines and Funnels
 Sales Functionality
 Sales Process Overview
 Sales Technical Overview
 Sales Online Functionality

Sales Setup Steps

Complete run through of the steps involved in Oracle Sales setup & analysis of requirements

Sales & Sales Online Profiles

Complete run through of Sales profile options, their implications and use

Sales Data Config

Lead Controls
 Locations
 Organisations
 Customers
 Currencies & Calenders
 Setup Internal Resources
 Managing Sales Information
 Managing Sales Tasks
 Managing Territories
 Managing Opportunities
 Pipeline Setup and Control
 Forecast Setup

Sales Online Integration Config

Setup Customers
 Setup Salespeople
 Universal Work Queue
 Integration
 Telesales Integration
 Online Integration