

Oracle Sales Cloud: Implementation

Duration: 5 Days

What you will learn

The course covers mandatory tasks that need to be performed once the system has been installed and provisioned for your use (with a focus on cloud deployments). It also explores some common administration and configuration tasks.

Learn To:

Set up territory management.

Navigate the application and manipulate data.

Perform a basic file-based import.

Set up opportunity management.

Set up customers.

Benefits to You:Ensure a smooth, rapid implementation of Fusion CRM. Better understand the foundation and configuration options of Fusion CRM so that you can make improved decisions during your implementation. Optimize the set up of territories and assure proper assignments for your organization so that sales agents can pursue the right leads and opportunities.

Foundational Topics

The course covers foundational topics to help you develop a base level understanding of Oracle Fusion CRM. Expert Oracle instructors will help you explore how to set up various areas of the product.

This class is not focused on end-user tasks, features or functions.

This course was formerly known as Fusion Applications: CRM Implementation

Audience

Business Analysts
Configuration Implementer
Implementation Consultant
Technical Administrator

Course Objectives

Navigate the application and manipulate data

Manage users and CRM resources

Perform a basic file-based import

Configure common components

Configure territory management

Configure assignments

Configure lead management

Configure opportunity management

Configure forecasting

Course Topics

Fundamentals

Oracle Fusion CRM overview
User interface overview
Functional Setup Manager (FSM) overview
Profile options and lookups
Geographies
Security, resources, and visibility overview
File-Based import overview

Customer Center

CRM Parties: customers, consumers, sales accounts, and prospects Common Components: appointments, interactions, notes, tasks, and task templates

Territory Management

Territory dimensions
Territory jobs and synchronization
Territory proposals

Assignment Manager

Territory-based assignment (TBA) Rule-based assignment (RBA)

Lead Management

Scoring, ranking, qualifying, assigning, and converting Qualification and assessments

Opportunity Management

Opportunity sales methods and stages
Sales coach
Opportunity revenue items, sales credits, and close behavior

Forecasting

Criteria, periods, and history Adjustments and overrides

Additional Topics

Assessments and assessment templates Sales Catalog

Appendixes

Oracle Composers overview
Extensibility overview
Personalization overview
Analytics and reporting overview
Oracle Fusion CRM for Microsoft Outlook overview
Oracle Fusion Mobile Sales overview