

ORACLE – PEOPLESOFT CRM COURSE CONTENT

- 1. Business Process Overview
 - Describing PeopleSoft Enterprise CRM Common Foundation
 - Describing Customer Management
 - Describing Workforce Management
 - Describing Product Management
 - Describing Common Features
- 2. Getting Started With CRM
 - Describing Sign-in Security Access
 - Signing In to PeopleSoft Applications
 - Explaining the Features of PeopleSoft Pure Internet Architecture
 - Using Navigational Aids to Maximize Efficiency
 - Describing Elements of Components
 - Describing Search Pages
 - Describing Methods for Efficient Searching
- 3. Viewing and Modifying Data
 - Describing Effective Dating
 - Describing Action Types
- 4. Describing Data in Tables
 - Describing Types of Tables
 - Describing Processing and Default Tables
 - Describing Translate Tables
 - Describing Transaction and Control Tables
- 5. Defining Business Units, SetIDs, and Tableset Controls
 - Describing the Association of Tables With Business Units and SetIDs
 - Setting Up Values in a Control Table
 - Developing Tableset Sharing Architecture
- 6. Working With the Customer Data Model
 - Describing the Customer Data Model

- 7. Managing Customers
 - Setting Up Control Values for Customers
 - Setting Up Companies
 - Setting Up Contact Information
 - Setting Up Persons
 - Setting Up Sites
 - Using Quick Create
- 8. Working with the 360-Degree View and the Relationship Viewer
 - Using the 360-Degree View
 - Viewing and Maintaining Relationships
- 9. Managing Contacts and Tasks
 - Describing Contact Management
 - Managing Contacts and Tasks
 - Setting Up Task Management
- 10. Managing Workers in Customer-Facing Applications
 - Describing Workers
 - Setting Up Foundational Data for Workers
 - Creating Workers
 - Defining Worker Information
- 11. Managing Workers in Worker-Facing Applications
 - Describing Considerations for Worker-Facing Applications
- 12. Managing Product Definitions
 - Describing Products
 - Setting Up Control Tables for Products
 - Setting Up Product Definitions
 - Setting Up Product Packages
- 13. Managing Installed Products
 - Describing Installed Products
 - Setting Up Installed Product Tracking
 - Tracking Installed Products
- 14. Managing Worklists and Notifications
 - Managing PeopleSoft Enterprise CRM Worklists
 - Setting Up and Using Manual Notifications

- 15. Evaluating Integration, Automation, and Configuration Options
 - Describing PeopleSoft Enterprise CRM Integrations
 - Describing PeopleSoft Enterprise CRM Configuration Tools