

SIEBEL CRM ADMIN ONLINE TRAINING COURSE CONTENT

Course Content:

Introduction to Siebel CRM

- Navigating Siebel CRM Applications
- Working with Data in Siebel CRM Applications
- Exploring the Siebel Architecture
- Understanding Object Definitions

Access Control of Records and Views

- Security and Access Control
- Responsibilities and Views
- Users, Positions, and Organizations
- Controlling Access to Customer Data
- Catalogs and Master Data

Administering Literature

Customizing the User Experience

- Modifying Tab Layouts
- Administering View Links
- Customizing Home Pages
- Resetting a User's Preferences

Administering Lists of Values

- Administering Lists of Values
- Administering Phone Formats
- Administering Hierarchical Lists of Values

Administering Initial Data

- Countries, Currencies, Languages, and Locales
- Periods
- Time Zones
- Households
- Expense Types and Payment Terms
- ZIP Codes
- Industries
- “Contact Us” Information

Quick Fill Templates and Predefined Queries

- Administering Quick Fill Templates
- Administering Predefined Queries
- Understanding the Default Predefined Query

Administering Message Broadcasts

- Administering Alerts

Administering Activity Plans and Templates

- Defining Activities, Activity Plans, and Activity Templates
- Administering Activity Templates
- Administering Sales Methods
- Administering Assessment Templates
- Administering Siebel iHelp
- Comparing Siebel iHelp, Task UI, and SmartScripts
- Creating iHelp Items

Administering Business Automation

- Defining Business Services, Business Service Methods, and Arguments
- Activating Workflows
- Administering Inbound Web Services
- Administering Approvals
- Administering the Universal Inbox
- Administering Siebel Reports

Submitting Jobs

- Submitting Jobs
- Creating Job Templates
- Creating State Models
- Administering Audit Trail

Setting System Preferences

- Default MVG Exists Query
- Auto Mgr Calendar Access
- Forecast: Auto-Forecast
- Default Time Zone
- Universal Time Coordinated
- Strict Date Format
- Quick Print Application and Quick Print Output Format
- Administering Assignment Manager