

Oracle CX Sales: Sales Implementation

Code:	D106041GC30
Length:	2 days
URL:	View Online

This Oracle Sales Cloud Implementation course covers mandatory tasks that must be performed once the system has been installed and provisioned for your use and once core setup has been completed. In this hands-on course, you'll learn the common tasks to set up your initial sales implementation. When possible, it identifies common mistakes so that you are positioned for future success.

Learn To:

- Configure opportunity management
- Configure territory management and assignments
- Manage users and resources
- Perform required and optional implementation tasks, including configuring leads, opportunities, and classification categories

Benefits to You:

Understanding and practicing key set ups will ensure your deployment is as smooth as possible.

Skills Gained

- Configure opportunity management
- Configure territory management and assignments
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Who Can Benefit

- Administrator
- Implementer

Prerequisites

Suggested Prerequisite

- Oracle Sales and Service: Core Team Training

Course Details

Topics

Sales Users

Accounts and Contacts

Leads, Opportunities, and Assessments

- Assign, qualify, and convert leads
- Sales methods and sales stages
- Assessment templates, questions, responses, and scores

Territories and Territory Assignment

- Classification categories
- Dimensions, geography zones, and coverage
- Assignment objects, attributes, and mappings

Rule-based Assignment

- Rule-based assignment, rule, rule set, and rule category

Forecasting

- Forecast period, submission window, win probability, and override

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Schedule (as of 4)

Date

Location

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