ERP CRM

CURRICULUM

CRM OVERVIEW AND ARCHITECTURE
» Introduction and CRM Definition
» CRM Architecture Overview

CRM FUNDAMENTALS
» Business Partners
- B.P Type & Roles, Grouping
- B.P Relationships
- Partner Functions
- Consistent B.P Distribution
- Configuring Field Attributes
- Screen Configuration using VCT
- Additional Customization

» Organizational Management
- CRM Organizational Model and its advantages
- Elements of the Organizational Model
- Organizational data determination
- Testing Org data

» Product Master
- Product Types & Grouping
- Enhancing the Product Master
- Hierarchies, categories, set types and attributes
- Number assignments
- Basic Settings

» Opportunity Management
- Overview of lead management
- Opportunity management
- Sales methodology in CRM Online
- Sales Assistant
- Sales life cycle and Phases
- Additional customization

» Activity Management
- Types of Activities
- basic Settings
  Monitoring Activities

» Partner Determination
- Partner determination in business transactions
- Terms and concepts of partner determination
- Customizing for partner processing
- Define New Partner Functions

» Sales Transactions
- Structure of sales transactions
- nquiry and qutation
- Creating New Sales Transactions
- Creating Follow-Up Sales Transactions
- Sales order scenario CRM-R/3
- Basic Settings

» CRM Billing

CRM FUNDAMENTALS - II
» Marketing Planning & Campaign Management
- Marketing Plans, Campaigns and Promotions
- Creating and editing Marketing Projects
- Promotion Planning and Allocation Scenarios
- Content Management
- Authority Checks
- Advanced Customization
- Creating Attributes for Business Partner Segmentation
- Maintaining Data Sources for Segment Builder
- Creating Samples for large target groups
- Segment Builder

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- Creating Attributes For business Partner Segmentation
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» **Personalized Forms**
- Explaining the editing options for mail templates
- Creating personalized e-mails
- Creating personalized subject lines
- Creating personalized attachments
- Advanced Customization

» **Campaign Execution**
- Execute campaigns across multiple interaction channels

» **Lead Management**
- Inbound/Outbound lead generation
- Lead qualification
- Advanced Customizataions

» **CIC**
- Creation of Interaction Centre
- Configuration of Compounds
- Action Box
- Reminder Scripting
- Interactive Scripting

» **ASAP**

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