

Pivotal 5.9 Foundations and Customization Boot Camp

Overview

After taking this 5-day course your staff should be able to customize the Pivotal CRM using a Toolkit. This intensive, condensed course combines topics from three courses. This boot camp is available in two versions, emphasizing either Active Access or Windows Access Customization advanced customization features:

1. 115-et: Pivotal 5.9 Technology Foundations for Customizers and Administrators
2. 200-C: Pivotal 5.9 Toolkit Customization
3. Either 204-eT: Pivotal 5.9 Toolkit Customization - Active Access Interface or 203-eT: Pivotal 5.9 Toolkit Customization –Windows Access Interface

Audience

Customizers, 7 participants maximum

Prerequisites

Relational database experience and knowledge of SQL is recommended.

Topics Covered

Product Overview

- Define Pivotal CRM.
- Describe Pivotal Platform and Applications.

eRelationship Architecture

- Explain Business Module and Enterprise Data Databases.
- Explain the roles of the three components of an eRelationship system.
- Describe the different eRelationship systems.
- Outline the advantages of the eRelationship Architecture.
- Define eRelationship systems.

Managing the Customization Process

- Describe the phases of the customization process.
- Use the functions of the eRelationship Enterprise Manager that are pertinent to Customizers.
- Connect and disconnect from a system.
- Backup and restore an eRelationship system.
- Set up an Offline system.
- Apply customization changes to Offline System.

- Upgrade a Master (Production) system from Offline.

Security Permission

- Assign permissions to eRelationship objects.
- Create new eRelationship security group.
- Create new connection types.
- Add users to eRelationship security group.
- Delegate security rights.

Database Design and eRelationship

- Describe the underlying structure of relationship databases and the implications of that structure for eRelationship systems.
- Use relational database terminology.

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Topics Covered, Cont'd.

CMS (Customer Management System) Interface

- Identify Core, Sales and Service out-of-the box CMS Business Objects.
- Navigate Pivotal Smart Portal.
- Search for data with different types of search.
- Create and edit records.
- Explain Pivotal Links.
- Explain CMS Workflow on given examples.
- Use Contacts, Companies, Leads, Opportunities and other CMS Business Objects.

Target Action Objects

- Identify the difference between End User and System Action Objects.
- Create Reports and LetterExpress Templates in the Customization system.
- Test newly created Action Objects in the Offline System.

Advanced Query Writing

- Use the eRelationship Query Interface.
- Create target and user queries.
- Use parenthetical expressions .
- Decide where to use subqueries.
- Decide where custom SQL may be used.
- Use queries in security and secondary grid filters.

Data Dictionary

- Classify the different types of data that are stored in an eRelationship system.
- Define the term 'data type'.
- Create a new data type.
- Edit an existing data type.

Tables

- Identify the structure and features of database tables in eRelationship system.
- Create a new table.
- Identify the six default fields.
- Determine when to create Regular, Choice and Combo field.
- Create foreign key fields.
- Create and edit table-level formulas.

- Create indexes.

eTab Functionality

- Create a Table menu item.
- Create a URL menu item.

Active Forms (Active Access Only)

- Determine how active forms are structured.
- Use the Active Forms editor to create and modify active forms.
- Convert windows forms to active forms.
- Add fields, separators and static text to forms.
- Create field formulas.
- Explain caching with active forms.
- Add client scripts to active forms.

Forms (Windows Access Only)

- Create and modify complex windows forms.
- Create, organize and position primary and secondary layouts.
- Work with buttons and bar buttons.
- Set the Tab order for fields.
- Add field formulas.
- Add filters to fields.

Active Searches (Active Access Only)

- Search "Desktop Findable" fields.
- Search selected fields in one table.
- View results of search displayed using a search result list.
- Set search display and quick search permissions.
- Define active search using a predefined query.
- Enable full-text searching.

Dynamic Lists (Windows Access Only)

- Create and modify the definition of the lists.
- Create a complex list.

iTab Functionality

- Create in-Context Query menu items.
- Create in-Context URL menu items.
- Create in-Context Plug-ins.



Topics Covered, Cont'd.

Smart Portal

- Customize the Home Page.
- Add Smart Portal Categories.
- Add SmartPortal Content URLs, Plug-ins, Queries.
- Add Graphs.
- Customize the logo on login screen and Home Page.
- Modify the Portal Banner.

Pivotal Transporter

- Transport objects safely from one eRelationship system to another.
- Interpret the information that the Transporter returns during and after an import.
- Use the Business Module maintenance features of the Transporter.

Pivotal Cache (Windows Access Only)

- Explore effect of Pivotal Cache on the eRelationship performance.
- Describe the use of the Pivotal Cache by the different data structures in Pivotal system.
- Discuss the implications of the Pivotal Cache on multiple users.
- Analyze the effect of Pivotal Cache on the Secondary Grids on forms.

Language Dictionary (Active Access Only)

- Change out-of-the box labels.
- Create a new language.
- Import string translations.
- Change user's language.

Color Schemes (Active Access Only)

- Explain which aspects of the Active Access UI can be customized.
- Identify which cascading style sheets are used to modify various classes of the UI.
- Export and import color schemes.

Help

- Indicate how help is accessed.
- Specify which types of help are available.
- Specify which types of help can be customized.
- Identify the steps required to create help files.
- Place help files.

Microsoft Office Integration

- Describe Pivotal eMail Connector.
- Describe Pivotal Research Services for MS Office.

Resources

- Review the resources available for you.