Certified Unanet CRM Administrator Assessment Guide

The Unanet Certification Program is an industry standard that will help validate your level of skill and knowledge using Unanet products. Certification will help to set you apart in the competitive world of enterprise applications.

The Unanet CRM Administrator Certification demonstrates users' knowledge required to perform administrative processes using Unanet CRM by Cosential.

This exam guide is intended to provide you with an overview of the format and content of the certification exam. In this guide, you will find a list of categories and topics with their weight distribution, as well as suggested resources to prepare for the exam.

EXAM BLUEPRINT

- The exam consists of 45 multiple choice questions.

- This is a timed 75 minutes exam.

- The minimum passing score for the exam is 80%.

- You will be given one attempt to pass the exam; if you do not pass, you will need to complete the recommended training listed below before attempting the exam again.

- The exam questions will include the categories and topics listed below and are weighted as shown:

Where Information Means Insight

Unanet

unanet.com

CATEGORY			WEIGHT
Field Customization and Custom Fields	• Add/remove fields • Re-labeling	• Making viewable and required • Administrate Opportunity fields menu	**18%**
Value Lists	• Preferences • Shared value lists	• Re-labeling	**13%**
User Manager	• Creating users/groups • Adding users to groups	• Default user groups • Enabling permissions	**18%**
Dashboards	• Creating/Managing dashboards • Adding widgets to dashboards	• Sharing dashboards	**16%**
Reporting	• Viewing/Managing reports • Saving reports • Exporting reports	• Using filters and grouping for reports • Building Opportunity Hit Rate report	**16%**
WorkFlows	• Understanding Actions and Events	• Building workflows	**13%**
Firm Setup	• Adding/deleting firm orgs	• Re-labeling firm orgs	**6%**

EXAM PREPARATION

The exam is based on the training content listed below. While it is optional, we recommend you complete the following courses before attempting the exam.

Self-Paced Learning	
Unanet CRM	• Growing Contacts (ELN) • Understanding Contacts (ELN) • Growing Contacts (ELN) • Managing Leads & Opportunities (ELN) • Using Dashboards & Widgets (ELN) • Using Reporting (ELN)

Instructor-Led Training or Self-directed Learning	
Unanet CRM	• Administering the System (SDL)

Please direct questions or comments regarding this and other Unanet University content to **VirtualUU@unanet.com.**