Certified Unanet CRM Implementer 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 Implementer Certification demonstrates users' knowledge required to perform system implementation of Unanet CRM by Cosential.

This exam guide is intended to provide you with an overview of the format and content of the accreditation 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 50 multiple choice questions.
- This is a timed 75-minute 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:

CATEGORY	WEIGHT
Implementation Process • Phases of implementation • Stakeholders, Roles, Tools	**6%**
Business Process Discovery • Five pillars o Meeting agendas • Data Discovery • Connect Discovery	**23%**

Configuration of functional system areas
• Meeting agendas
   o Firm Org, Company, and Contact configurations
   o Leads and Opportunities configurations
   o Personnel configurations
   o Projects configurations
• Unanet CRM Mobile
• Unanet CRM for Outlook
• Business process consulting
	23%

Data Migration
• Data packages
• Order of imports
• Meeting agendas
    o Personnel data
    o Companies and Contacts data
    o Leads and Opportunities data
    o Projects data
	29%

Testing and Validation • Testing environments • Test Plan agenda	**14%**
Launch Process and Go-Live Support • End User training • Customer Support and Success	**5%**

Exam Preparation

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

Instructor-Led Training OR Self-Directed Learning
Unanet CRM: Administering the System

As an alternative to our training content, you may also review the exam topics in our Help documentation and Support Portal.

Resource Documents
Support Portal: CRM | FAQ | What Are The Five Pillars Of CRM?
Support Portal: CRM | Sys Doc | CRM For Mobile
Support Portal: CRM | FAQ | How Do I Get Started with CRM Mobile?
Support Portal: CRM | Sys Doc | Unanet CRM For Outlook Add-In
Support Portal: CRM | How To | Get Started With Unanet CRM for Outlook
Support Portal: CRM | Sys Doc | CRM For Outlook System Requirements
Support Portal: How To | Enable, Install, And Configure CRM For Outlook
Support Portal: CRM | Sys Doc | Sandbox Environment

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