Instructor Led Technical Training Courses:

Live or via Webinar.

For Users and Administrators

U101 – Initial User Training – 2 hours (syllabus depends on Role Access)

This training will introduce the user to navigation techniques within the database, locating data and entering and editing new information. Intended for users who will not be responsible for setting system design or data rules. Users will login to a pre-defined role and have well-defined responsibility. User interface and access will be pre-established by the system administrator and training will reflect the role profile.

- Database record keeping and data flow between records
- The Main Screen information and how to navigate
- The Hot Button, Bookmarks, Recent Items, Jump-to
- Setting appointments and tasks
- Managing tasks: creating, closing and follow-up tasks
- (If Process Builder is used) Advancing an Opportunity in a Process
- Data views for Organizations, Contacts, and Opportunities – requesting additional data views from the administrator
- Creating personal data views
- Viewing Opportunities by Sales Stage, Process Step and Period
- Sending e-mails with existing templates (Admin creates the templates)
- Output for printing or mail merge to MS Word
- Other functionality depending on Role Access
- Adding new Contacts, Organizations and Opportunities
- Setting up e-mail and e-mail templates
- Viewing data by View Profile
- Creating Views vs. Reports
- Using Reports for external purposes
- Calendar views, setting appointments and linking
- Create calendar entries - sharing your calendar with other users
- Task Management

- Compound searches
- Synchronize with MS Outlook
- Access & edit Contact, Organization and Opportunity records
- Manually adding new records
- Importing and exporting records
- Changing a field value in multiple records

A101 - User and Administrator Training for Process Builder – 2 hours
(delivered in two sessions w/ homework)

For users who intend to use the database as a transaction process management tool, this training introduces the user and administrator to the concept of "Opportunity Management" and Process Management.

Users and Administrators will learn

- Expanded Concept of the Opportunity and Opportunity Process
- Opportunity snapshot
- Setting the Primary Contact of the Opportunity
- Built-in Opportunity Reports
- Building customized reports
- Manage sales with opportunities or by account
- Building a Sales Processes: considerations, advantages, techniques
- Building a basic process
- Building note, task, and e-mail templates for the process step
- Updating a field or sending an e-mail in the Process Step
- Assigning users in the Sales Process
- Due dates and auto advance
- Tracking due dates with views and process step monitoring applet
- Viewing opportunities by Stage, Process Step, or other criteria
- Reporting on opportunity process step progress (steps reached, etc)
- Process step alerts for team members
- E-mail for alerting off-line users