Sage CRM – Advanced Agenda

What our customers had to say:

"I have learnt a great deal today. I look forward to going back to the office tomorrow to use the Software " **Haynes Publishing**

"Excellent course (content and trainer). Addressed all the points I was told it would in more detail and more clearly than I thought would be possible. All in all, well worth the time." **The Jelf Group**

"This was a very good course and met my objectives" **Renishaw Plc**

"Very informative and well run" **Lloyds TSB Autolease**

- **On line training**
- **Classroom training**
- **On site training**
- **Real time training**

Aim

To ensure that users have an adequate understanding of some of the more advanced functions of Sage CRM as a Contact Manager – i.e. Querying, Creating Word Processing Templates, Target lists and Customisations etc...

Pre-requisites

Students should already have a working knowledge of Windows and should have a good working knowledge of Sage.

Duration

Course is normally one full day - start time is 10.00am and we aim to finish around 4.30pm. Refreshments, provided throughout the day, and buffet lunch is included (If the course is held at the Wizard Systems Training Centre).

Why choose Wizard Systems?

- Training providers since 1993
- Courses are friendly, informal and run in small groups
- Plenty of hands on experience and exercises
- In training surveys 100% of attendees said they would recommend our training to others

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Agenda

Introduction
  Administration
  CRM Structure

User Administration
  Adding and Changing Users
  User Templates
  Disable Users
  Deleting Users
  Teams
  Creating Teams
  Assigning users to a Team
  User access to team CRM
  Security Management, Profiles and Territories
  User Configuration

Customisation
  Adding a New Field
  Placing New Fields on Screens
  Modifying Screen Layout
  Advanced Customisation Scripts
  List Customisation
  Adding a New Column to a List
  Modifying the Layout of an Existing List

Document Management
  Merging a Document
  Creating a Merge Document
  Placing a Template on the Server

Target Lists & groups
  Creating a Target List
  Merging a Target List to a Document

Email
  Creating an E-Mail Template
  Sending Email using an Email Template
  Creating an email to send to Lists

Reports
  Creating a New Report (List)
  Running a Report
  Creating a New Report (Cross Tab)
  Creating a New Report (History)

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