# Introduction to Sage CRM

## 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 the day to day basic functions of using Sage CRM as a sales and client management tool to improve their productivity. The course is very much 'hands on' with plenty of real life exercises.

### Pre-requisites
Attendees should already have a working knowledge of Windows and Windows applications like Word or any Database system.

### 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

## Agenda

**Navigation**
Finding your way around
Menus, toolbars, navbars, right-click
Examining each main view
Looking at preferences
Finding records

**Working with Company Records**
The company view in detail
Company tabs
Adding new companies and contacts and editing
Alternate addresses

**Working with People Records**
The people view in detail
Adding additional people, editing, associating and deleting
People tabs
Alternate addresses

**Opportunity Management**
The opportunity view in detail
Enter an opportunity
Adding quotes
Closing opportunities
Converting a quote to an order
View opportunities

**Tracking Case (if you have this option)**
Overview of cases
Calendar and Activities
The calendar and activities tabs in detail
Scheduling phone calls, meetings etc and completing them
Invite attendees, make recurring activities
Viewing team calendars and activities

**Communication**
Accepting invitations
Declining activities
Create a new template
Perform a basic mail merge
Send an email
Additional Functionality
Look at sales library, reports and campaigns

**Basic Lookups**
Find a person, company or opportunity
Add to your contacts group
Build a target list

**Team CRM**
Overview of team CRM
Look at team information
Compare teams

**Reports**
Overview of reports
Modify a report

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