Workbooks Systems Admin Course

Aim

This course is designed for users who have the responsibility for setting up, configuring and maintaining your Workbooks system, as well as anyone with responsibility for importing data into the system or for writing reports to show the key metrics for your business.

Pre requisites

You do not require any complex IT knowledge to take the 'Workbooks System Administrator' training course. Experience of working with databases and/or a reasonable understanding of an application like MS Excel would be helpful, along with a good overview of your organisation and what you intend to use Workbooks for.

Duration

Course is normally two full days, but can be shorter with prior arrangement.

Why choose Wizard Systems?

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

Agenda

On completion of the course you will be able to:

- Set up your Users, giving them the correct access to the records and functionality relevant to their job role
- Customise the environment to make using Workbooks easy and ensure that all data important to you is captured
- Configure the system with the right financial framework to reflect your business
- Manage how emails are handled
- Format templates so that routine data is displayed consistently, including creating professional documentation that can be sent to your customers and prospects
- Import records to populate your database
- Prepare the system so it can accept leads and support cases directly from your website
- Understand how to integrate Workbooks with Google Apps
- Build reports to display your key business data

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

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