

Course Information

Duration: Courses commence at 10.00am and aim to finish by 16.00. An hour has been set aside for lunch with further time allowed for refreshment breaks.

Target Audience: This course is designed for delegates who need a good general understanding of how to use Sage CRM for their daily office tasks. The following prerequisite knowledge is essential so that students attending this training course may gain full benefit from the course topics; general keyboard skills and competence in using a computer; experience of using the Internet and browsing web sites.

Course Objectives: When delegates return to the workplace they will be able to use Sage CRM and apply it to their daily work tasks, for example, scheduling and completing communications, sending emails, adding new contacts, managing sales opportunities, etc.

Course Details

- Introduction to Sage CRM – browser based, data relationships
- Navigation around Sage CRM
- Finding, Sorting and Filtering Records
- Creating Contact Records
- Managing Communications
- Using Calendars
- Sending E-mails
- Working with MS Outlook
- Managing Documents
- Managing Leads
- Opportunities Management
- Reporting
- Setting User Preferences
- Using My Dashboard

This is the standard content covered on a Scheduled Course at our Worcester Offices. You can also have bespoke training delivered on your premises. This means you can choose your own bespoke agenda and decide the schedule for the day.

MAS offer a variety of flexible training options. To discuss your company's training requirements and get advice on the most cost effective training for you, please call the MAS Team who will do their best to help 0844 7454588.