

## 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 to be able to make changes and administer the Sage CRM as part of their role. 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 and attending the Sage CRM Basic Course.

**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

### User Administration

- Add a new user - copy templates
- Access privileges
- Changing user details
- Disabling a user
- Deleting a user

### The Teams View

- What is a team?
- Teams in your organisation
- Creating a new team
- Assigning Users to Teams
- Setting User Access to the Team CRM button
- Deleting a team

### Security Management

- Adding profiles
- Assigning profiles
- Deleting a profile
- Territories and their Rules
- Assigning a territory to a user

### Sales Library

- Overview
- Adding/deleting documents
- Librarian administrative role

### De-Duplication

- Enabling de-duplication
- Using de-duplication

### Target Lists

- Introduction
- Creating a new target list
- Refreshing a target list
- Sending mass emails

### Document Templates

- Creating a new document template
- Changing an existing document template
- Merging a document
- Pre-defined mail merge templates

### Reports

- Creating basic reports
- Seeing reports

### Pick Lists

- Overview of picklists
- Locate a picklist
- Edit a picklist

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.