

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

Security Management

- Advanced Territory Management
- Created By, Assigned To, Team Special Territories
- Absolute Territories
- Parent/Sibling Territories

Customisation

- Translations
- Field Customisation
- Screen Customisation
- List Customisation
- Tab Customisation
- View Customisation

Notifications

- Quick Notifications

Advanced Customisation

- Key Attribute Profiling

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.