



# Sage CRM Software Training

**To help all users gain the maximum benefits from Sage CRM and achieve a rapid return on investment, Preact CRM offer a selection of practical, cost effective training solutions.**

Our team of highly skilled trainers are always ready to advise on the best methods for achieving results with Sage CRM. Continuous interaction between the trainer and delegates using practical skill building exercises ensure the topics we cover are relevant to your training needs and consistent with the way your organisation will use Sage CRM.

Due to the wide versatility and the sheer scope of customisation possible with Sage CRM the user courses we deliver often follow a bespoke content structure in line with individual team requirements. However, to offer a suggested outline of the training areas we are able to cover we've copied below some sample course structures.

## INTRODUCTION TRAINING - 1 Day Course

**Provides a solid foundation in the principles of using Sage CRM and focusing on the core features and functionality for end users. The course is designed for new Sage CRM MME users.**

Key topics include:

- **Introduction to Sage CRM**
- **Navigating Sage CRM** - logging on, navigating the database, Sage CRM menu's, working in the 'My Dashboard' view, explaining the main view summary, using the recent menu and Sage CRM preferences.
- **Searching for information** - running basic searches for people, companies and opportunities.
- **Companies** - working in the company view, adding / amending company records, explaining company tabs, using alternative company addresses.
- **People** - adding people, editing / associating people with companies, using people tabs, applying alternative addresses.
- **Opportunities** - Using the opportunity module, logging new opportunities, creating quotes, converting quotes to orders, viewing opportunities and sales forecasting.
- **Marketing** - building / editing lists and sending mass email
- **Calendar & Activities** - calendar & activity tabs, scheduling activities, assigning activities, activity notifications, recurring activities, team scheduling and viewing the team calendar.
- **Communication** - working with Microsoft Word / Email templates, performing mail merges, using document drop and synchronising information with Outlook.
- **Team CRM** - overview of Team CRM, reviewing team information and comparing teams.
- **Sage CRM Reports** - overview of reports.





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## SYSTEMS ADMINISTRATOR TRAINING - 2 Day Course

Providing Sage CRM Administrators with the key skills and knowledge they need to effectively manage, maintain and customise their CRM database. Delegates attending this course will have attended the Introduction training and will already be competent users of Sage CRM.

Key topics include:

- **Administrator Overview** - explaining the Sage CRM database architecture.
- **Admin Workspace** - overview of the administration workspace and using the different admin views.
- **General CRM Administration** - adding new users, defining access privileges, amending user details, disabling / deleting users and de-duplication settings.
- **Controlling CRM Teams** - Defining CRM teams, adding new teams to CRM, changing team membership, controlling user access permissions and removing teams.
- **Database security** - adding / assigning / deleting user security profiles, defining territories and applying rules, allocating users to territories.
- **Reports** - creating basic Sage CRM reports.
- **Sales Library** - library overview and managing file storage.
- **Screen & field customisation** - adding / changing database fields, using field drop-down lists, changing search field options.

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## BESPOKE SAGE CRM TRAINING

As mentioned overleaf we also offer bespoke Sage CRM courses including in depth training focused on the Sage CRM marketing module, sales automation, customer service case management and report designing.

To discuss your training requirements call us on 0800 381 1000.

