



Course Aim

The aim of the system set-up Training Course is to provide the attendee with the ability to set up the main framework for the CRM system.

Pre-requisites

No specific training is required prior to this training course. However, it would be advantageous if you have a basic understanding of the Internet and web browser technologies and any type of portal.

Suggested Attendees

This course is intended for management level users and those who will need to have an understanding of the integration of the Microsoft CRM system.

Course Content

Core CRM

- Appearance & Presentation
- System Customisation
- Establishing the Organisational Structure
- Announcements
- Template Manager
- Subjects
- Product Catalog

Distinction CRM

- Security
- Application Configuration
- Home Page Views
- Mail Merge Templates
- Default Views
- Duplicate Checking
- Picklist Maintenance
- Account Types
- Web Importing

Course Objectives

The attendee will obtain the skills to successfully setup the Microsoft CRM application by understanding the terminology and appearance; managing customisation; establishing the organisation and managing products.

Methodology

An overview of the system setup functionality of Microsoft CRM, which is followed up by hands on training provided by the course leader to reinforce all aspects of the training.

Duration

1 day
From 10.00 a.m. - 16.30 p.m.

Location

Distinction's Swansea Training
Centre or customer site

Cost

POA - dependant on location.