CRM TRAINING PACKAGE

CONSUMER & INVENTORY DATA MANAGEMENT ESSENTIALS

If your responsibilities include collecting and fulfilling inquiries from visitors to your destination, taking this class will boost your skills to the next level.

**TOPICS**

- Importing and merging contacts in your Consumer user group
  - Building forms for your website
  - Developing reports from contact and inquiry data
- Other essential details of the Visitor Experience job roles

**DURATION**

Trainings will be a total of 2 days

**LOCATION**

On-site at client’s office or Simpleview’s Tucson or Pittsburgh offices

**BEFORE THE TRAINING**

We highly recommend that students participate in our CRM Overview online course in the Brainery and take the associated exam before the on-site training session, as it will provide a solid understanding of basic Simpleview CRM concepts and functionality. This course and exam will be provided to all on-site students at no additional charge. Going through the material will provide the smoothest training experience possible.
Any sections of the training that are not listed as ‘Optional’ and/or ‘Optional by Trainer’s Discretion’ cannot be removed from a training engagement.

**CONTACT DEVELOPMENT**
- Navigating Contacts
- Using Contacts Filters
- Modifying the Grid Settings
- Adding a New Contact
- Creating/Editing/Deleting Contact Tags
- Creating/Editing/Deleting Contact Types in Admin

**IMPORTING AND MERGING CONTACTS; OTHER BATCH ACTIONS***
- Importing Contacts
- Merging Contacts
- Batch Merging
- Batch Referrals

**USING TRACES FOR CONTACTS AND INQUIRIES***
- Navigating Traces on the Contact and Inquiry Detail
- Adding a New Trace
- Editing, Cloning and Deleting Existing Traces
- Labeling Traces as Completed
- Printing Trace History for a Contact or Inquiry
- Creating/Editing Deleting Trace Priorities and Types
- Using MyCalendar to Visualize Traces

**ADDING NOTES TO CONTACTS AND INQUIRIES**
- Navigating Notes on the Contact and Inquiry Detail
- Adding a New Note
- Adding/Updating Note Categories
- Searching for Notes
- Printing Notes

**ADDING COMMUNICATIONS TO CONTACTS***
- Reviewing Communications for a Contact on the Contact Detail
- Using Communications Filters
- Sending a Communication
- Developing Templates for Communications
- Using the Email Bounce Log
- Sending Contacts to Distribion for Communications
- Viewing Communication Activity in Distribion via Simpleview CRM

**MODULES & TOPICS CONTINUED**
PULLING CONSUMER DATA INTO REPORTS - FUNDAMENTALS

- Viewing Reports
- Using Reports Filters
- Modifying the Grid Settings
- Using Standard Reports to Get Information
- Creating Simple Reports

PULLING CONSUMER DATA INTO REPORTS - ADVANCED TECHNIQUES*

- Creating Summary Reports
- Creating Summary Detail Reports
- Creating Cross-Tab Reports
- Scheduling Reports
- Sharing and Installing Reports

USING SEARCH TO FIND CONSUMER DATA

- Navigating Saved Searches
- Using Searches Filters
- Developing a New Search
- Conducting a Global Search

USING ADMIN FEATURES TO ENHANCE CONSUMER DATA AND WORKFLOWS

- Working with Custom Fields
- Reviewing and Developing Security Roles
- Developing Triggers
- Restoring Content in the Recycle Bin
- Managing Dropdowns

MANAGING BROCHURES

- Navigating Brochures
- Using Brochures Filters
- Creating/Editing/Deleting Brochures
- Associating Brochures with an Inquiry
- Fulfilling Brochure Requests

MANAGING CONSUMER INTERESTS

- Navigating Consumer Interests
- Using Consumer Interests Filters
- Creating/Editing/Deleting Consumer Interests
- Associating Consumer Interests with an Inquiry

DEVELOPING FORMS FOR CONSUMER DATA

- Navigating the Form Builder
- Adding a New Form
- Reviewing the Form Detail
- Creating/Editing/Deleting Form Defaults
- Creating/Editing/Deleting Form Sections
- Creating/Editing/Deleting Form Questions
- Reviewing Form Submissions

ADDING CONSUMER FORMS TO YOUR WEBSITE VIA THE SIMPLEVIEW CMS**

- Using the Simpleview CMS Page Builder
- Adding Form Builder Widgets to a Page
- Reviewing the Proper Nav Item Settings for Response URLs/Thank You Pages
* Optional by Trainer’s Discretion - This cannot be removed from a training engagement unless the trainer chooses to do so because the client does not use this CRM feature/section.

** Optional - This can be removed if a client does not have our Simpleview CMS and is not interested in purchasing it.

Questions?
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