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.

MODULES & TOPICS

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

INQUIRY DEVELOPMENT

- Navigating Inquiries
- Using Inquiries Filters
- Modifying the Grid Settings
- Adding a New Inquiry
- Creating/Editing/Deleting Inquiry Types in Admin

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

USING THE INVENTORY USER GROUP

- Navigating the Inventory User Group
- Adding a New Product
- Creating and Fulfilling Orders
- Running Simple Reports and Searches

* 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?

Contact **accountmanagers@simpleviewinc.com**

or **520.575.1151**

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