



CRM TRAINING PACKAGE

DEVELOPING SIMPLEVIEW CRM REPORTS AND ADVANCED SEARCHES

This course is a must for anyone responsible for using analytics to drive results in a destination marketing organization. Developing Simpleview CRM Reports and Advanced Searches provides you with the skills and knowledge you need to gather analytics requirements, design and build custom reports, and deploy them to your users. Using real-world scenarios, this fast-paced course gives you the tools to analyze and share your key metrics across multiple Simpleview CRM user groups, such as Member/Partner, Meeting Sales and Consumer.

TOPICS

- Gathering data for analytics requirements
 - Analyzing and sharing key metrics
- Designing and building custom reports
 - Deploying reports

DURATION

Trainings will be a total of 1 day

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. Going through the material will provide the smoothest training experience possible.

MODULES & TOPICS

PULLING SIMPLEVIEW CRM DATA INTO REPORTS - FUNDAMENTALS

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

USING SEARCH TO FIND SIMPLEVIEW CRM DATA

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

PULLING SIMPLEVIEW CRM DATA INTO REPORTS - ADVANCED TECHNIQUES

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

Questions?

Contact accountmanagers@simpleviewinc.com

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