CRM TRAINING PACKAGE

EVENT DEVELOPMENT AND ATTENDEE MANAGEMENT ESSENTIALS CLIENT TRAINING

Event Development and Attendee Management Essentials is the comprehensive training that ensures your success with the Simpleview CRM Events/RSVP user group. It's a must for those who handle event details for your organization, such as member/partner mixers and other get-togethers.

TOPICS

- Managing attendees visiting from out of town
- Creating itineraries
- Reviewing incomplete registrations and export rosters
- Other essential tasks for your job responsibilities

DURATION

Trainings will be
a total of 1.5 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. 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.

EVENT DEVELOPMENT

- Navigating Events
- Using Events Filters
- Modifying the Grid Settings
- Adding a New Event
- Creating and Using Event Tags

ATTENDEE MANAGEMENT

- Navigating Attendees on the Event Detail
- Using Attendees Filters
- Adding a New Attendee to an Event
- Adding Mass Attendees to an Event
- Printing and Exporting Attendee Rosters
- Marking Attendees with Attendance Information
- Emailing Invites and Sending Reminders
- Reviewing Incomplete Registrations

MANAGING ATTENDEES VISITING FROM OUT OF TOWN*

- Adding Flight Info
- Adding Hotel Info
- Bulk Updating Flight Info
- Bulk Updating Hotel

CREATING ITINERARIES FOR EVENTS*

- Creating Itinerary Activities
- Connecting to Member/Partners
- Adding Service Providers
- Importing Activities
- Updating Imported Activity Dates and Times
- Generating Itinerary Templates
- Viewing in the Member/Partner Benefits Summary

REVIEWING AND MANAGING INVOICES*

- Navigating Invoices
- Using Invoice Filters
- Modifying the Grid Settings
- Editing/Updating an Invoice
- Printing and Emailing Invoices

ADDING COMMUNICATIONS TO AN EVENT

- Reviewing Communications for an Event on the Event Detail
- Using Communications Filters
- Sending a Communication
- Developing Templates for Communications
- Using the Email Bounce Log

MODULES & TOPICS CONTINUED

USING TRACES FOR EVENTS*

- Navigating Traces on the Event Detail
- Adding a New Trace
- Editing, Cloning and Deleting Existing Traces
- Labeling Traces as Completed
- Printing Trace History for an Event
- Creating/Editing Deleting Trace Priorities and Types
- Using MyCalendar to Visualize Trace Data

ADDING INKIND/EXPENSES TO YOUR EVENTS

- Navigating Inkind/Expense on the Event Detail
- Adding a New Inkind/Expense to an Event
- Using Inkind/Expense Filters on the Event Detail

ADDING SERVICE REQUESTS TO YOUR EVENTS

- Navigating Service Requests
- Using Service Requests Filters
- Modifying the Grid Settings
- Adding a New Service Request to an Event
- Sending Communications to Partners Receiving Service Requests
- Reviewing Extranet Settings around Service Request Contact Permissions

ADDING NOTES TO YOUR EVENTS

- Navigating Notes on the Lead Detail
- Adding a New Note
- Adding/Updating Note Categories
- Searching for Notes
- Printing Notes

PULLING EVENTS RSVP DATA INTO REPORTS - FUNDAMENTALS

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

PULLING EVENTS RSVP 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 EVENTS RSVP DATA

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

USING ADMIN FEATURES TO ENHANCE EVENTS RSVP DATA AND WORKFLOWS

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

USING MOBILE CRM TO REVIEW MEDIA/PR DATA

- Reviewing Traces
- Reviewing Details on an Event
- Using the Mobile Navigation
- Bookmarking Content
- Account Management
- Sending Emails

* 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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