CRM TRAINING PACKAGE

GROUP TRAVEL MANAGEMENT AND SALES ESSENTIALS

This comprehensive and hands-on core training ensures your success with the Simpleview CRM Tour/Travel user group. It's a must for those who handle group travel and management and sales roles at your organization.

TOPICS

- Learning how to manage recurring tour groups
- Handling lead responses
- Developing reports from your available data
- Using your Mobile CRM to review details on-the-go

DURATION

Trainings will be a total of 2.5 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.

ACCOUNT DEVELOPMENT

- Navigating Accounts
- Using Account Filters
- Modifying the Grid Settings
- Adding a New Account
- Merging Accounts
- Creating and Using Account Tags
- Using Account Recaps
- Creating/Editing/Deleting Account Statuses
- Working with Affiliated Accounts
- Importing Accounts*

CONTACT DEVELOPMENT FOR ACCOUNTS

- Navigating Contacts
- Using Contact Filters
- Modifying the Grid Settings
- Adding a New Contact
- Merging Contacts
- Creating and Using Contact Tags
- Creating/Editing/Deleting Contact Types
- Linking Tour/Travel Contacts to Related Records in Other User Groups
- Navigating Traces on the Account, Contact, Lead and Service Request Detail
- Adding a New Trace
- Editing, Cloning and Deleting Existing Traces
- Labeling Traces as Completed
- Printing Trace History
- Creating/Editing Deleting Trace Priorities and Types
- Using MyCalendar to Visualize Traces

ADDING COMMUNICATIONS TO AN ACCOUNT AND LEAD

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

CREATING LEADS FOR ACCOUNTS

- Navigating Leads
- Using Leads Filters
- Modifying the Grid Settings
- Adding a New Lead
- Creating and Using Lead Tags
- Creating/Editing/Deleting Lead Statuses and Types
- Providing Details for Lost Leads
- Sending the Lead
- Closing the Lead

REVIEWING THE LEAD DETAIL AND HANDLING RESPONSES

- Navigating Leads
- Using Leads Filters
- Modifying the Grid Settings
- Adding a New Lead
- Creating and Using Lead Tags
- Creating/Editing/Deleting Lead Statuses and Types
- Providing Details for Lost Leads
- Sending the Lead
- Closing the Lead

MODULES & TOPICS CONTINUED

MANAGING RECURRING TOUR GROUPS*

- Account Client Production
- Lead Series
- Reports

ADDING PARTNER REFERRALS TO YOUR ACCOUNTS AND LEADS

- Navigating Partner Referrals on the Account and/or Lead Detail
- Adding a New Partner Referral to an Account and/or Lead
- Using Partner Referral Filters on the Account and/or Lead Detail

ADDING INKIND/EXPENSES TO YOUR ACCOUNTS AND LEADS

- Navigating Inkind/Expense on the Account and/or Lead Detail
- Adding a New Inkind/Expense to an Account and/or Lead
- Using Inkind/Expense Filters on the Account and/or Lead Detail

ADDING SERVICE REQUESTS TO YOUR ACCOUNTS AND LEADS

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

ADDING NOTES TO YOUR ACCOUNTS AND LEADS

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

PULLING TOUR/TRAVEL DATA INTO REPORTS – FUNDAMENTALS

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

PULLING TOUR/TRAVEL 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 TOUR/TRAVEL DATA

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

USING ADMIN FEATURES TO ENHANCE TOUR/TRAVEL 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 TOUR/TRAVEL DATA

- Reviewing Traces
- Reviewing Details on an Account, Contact, Lead and/or Service Request
- Using the Mobile Navigation
- Bookmarking Content
- Account Management
- Sending Email

* 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**

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