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*

### 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 for Communications
- Using the Email Bounce Log

### 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

### 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
**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 or 520.575.1151