



**This course is designed for:**

- New Sage SalesLogix end users
- Version upgrades where significant improvements have been made between versions

**Some of our Participant Comments:**

*"I felt I understood and utilized all of the basics already. I am looking forward to the advanced training."*

*"I learned so much from this class. Not just Sage SalesLogix, but also proper procedures."*

*"Thank you for allowing us to ask our own individual questions."*

**Summary**

The purpose of this half day seminar is to make your new Sage SalesLogix users productive right from the start. This course will teach the basics of Sage SalesLogix daily use and test the participant's ability to perform the new tasks right in class. The course agenda follows a standard checklist of skills to be mastered and the skill exercises are all customized to match your business needs, which gives the participants real life examples of how they will be using Sage SalesLogix.

**Course Content**

- **Getting Started**
  - Navigating the Workspace
  - Customizing Views
- **Working with Accounts, Contacts & Opportunities**
  - Understanding Account Relationships
  - Understanding Account Relationships
  - Navigating the Account Detail View
  - Navigating the Contact Detail View
  - Overview of the Opportunity Manager
- **Working with Activities & Events**
  - Describing Activities
  - Navigating the Activities View
  - Scheduling an Activity
  - Completing Activities
  - Managing Activities and Events
- **Performing Lookups and Creating Groups**
  - Performing a simple lookup
  - Understanding Groups
  - Saving & Editing Groups
- **Productivity Features & Best Practices**

**Note:** The trainer for this course will work with your Sage SalesLogix internal business owner to customize exercises that will teach the proper use of Sage SalesLogix at your company; getting your users off on common ground.



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