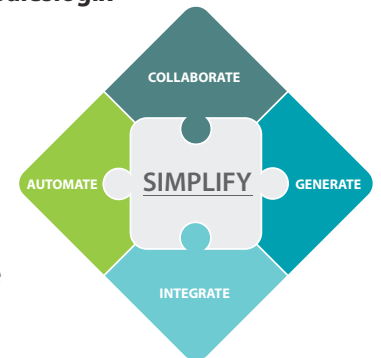




My Life in Saleslogix

Technical Skills Training: Getting Started with Saleslogix

The purpose of this half day seminar is to make your new Saleslogix users productive right from the start. This course will teach the basics of 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 Saleslogix.



Course Intention:

Who is this designed for?

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

Comments:

What participants have said...

"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 Saleslogix, but also proper procedures."

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

Course Content

- **Getting Started**
 - Navigating the Workspace
 - Customizing Views
- **Working with Accounts, and Contacts**
 - Adding New Accounts/Contacts
 - Navigating the Account Detail View
 - Navigating the Contact Detail View
- **Working with Activities & Events**
 - Scheduling an Activity
 - Completing Activities
 - Managing Activities and Events
 - Completing Unscheduled Activities
- **Performing Lookups and Creating Groups**
 - Performing a simple lookup
 - Using Dynamic Filters
 - Saving & Editing Groups
- **Productivity Features & Best Practices**
 - Using basic Outlook integration
 - Inserting Attachments

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



Dayton/Cincinnati, OH:
 550 N. Main St. Suite A
 Springboro, OH 45066
 (937) 885-1204

Charleston, WV:
 710 Random Rd.
 Ripley, WV 25271
 (304) 521-2387

Charlotte, NC:
 3635 Eastover Ridge Dr.
 Charlotte, NC 28211
 (704) 910-3872