



### This course is designed for:

- Sage SalesLogix end users with 90 days of on-the job experience with Sage SalesLogix

### Participant Comments:

*"Great Job! The trainer was extremely professional, outgoing, and knowledgeable!"*

## Summary

This half day seminar is a follow up to our Basics course and should be conducted @ 90 days from the initial Basics training of Sage SalesLogix. Once Sage SalesLogix users have been putting into practice all of the skills taught in the first course it is time to build on top of those skills with Basics Plus. This course will focus on making your users even more productive by teaching them lookup/query capability, template/mail merge knowledge, opportunity manager, and overall productivity tips.

## Course Content

- **Performing Lookups and Creating Groups**
  - Create a multiple value lookup
  - Save and name a lookup group
  - Perform a custom query
  - Create custom query with multiple and/or conditional values
- **Templates & Mail Merges**
  - Create a simple e-mail template
  - Perform a simple e-mail mail merge
- **Working with Opportunities**
  - Adding & Editing Opportunities
- **Productivity Tips**
  - Developing associations between accounts & contacts
  - Attaching documents to your Sage SalesLogix record
  - Using the Sales Library

**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; keeping your users on common ground.



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