



Cleary
Training
Associates



Customised IT Training & Development

Course Outline | SalesLogix End User

Duration: 2 Day

Objectives: Students will learn the basic skills necessary to begin using SalesLogix End User Client. They will add New Accounts, Contacts and Opportunities, Create Groups and Mail Merges.

Prerequisites: A basic understanding of using PC's, a keyboard and a mouse, plus knowledge of Microsoft Windows is required, gained either by previous experience or by attendance on a "Microsoft Windows User Introduction" course.

Components of SalesLogix

- SalesLogix Client
- Workgroup Administrator
- Architect

Navigation

- Navigating the SalesLogix Workspace
- Using Shortcut Menus
- Examining the SalesLogix Components

Searching for Information

- Black Bar Search
- Bevel Search
- Keyword Search
- Advanced Search
- Query Builder

Groups

- Creating Dynamic Groups
- Creating Ad Hoc Groups
- Editing Groups
- Group Layout

Advanced Outlook Integration

- Understanding Advanced Outlook Integration
- Integrating SalesLogix and Outlook Contacts
- Automatic Synchronisation of Calendar and Contacts
- Outlook Calendar Integration

Notes, Letters, Literature and Reports

- Inserting a Note
- Editing an Attachment
- Performing a Mail Merge
- Creating a Template
- Scheduling Literature Requests
- Using the Sales Library
- Generating Reports

Contacts and Accounts

- Understanding the Account and Contact
- Creating New Contacts and Accounts
- Adding Additional Contacts to Existing Accounts
- Alternative Address
- Developing Associations

Marketing

- Understand the Marketing Features
- Designing and Planning a Campaign
- Managing Campaign Response Information

Opportunities and Forecasting

- Understanding the Opportunity View
- Using Sales Processes and Pipeline Management
- Creating a New Sales Process
- Managing Sales Process Status
- Forecasting in SalesLogix
- Creating New Opportunities

Activities and Calendars

- Viewing the Activities and Calendar Windows
- Viewing Other Users Activities
- Scheduling Activities
- Scheduling Activities for Other Users
- Completing Activities
- Confirming/Declining Activities

Processes

- Understanding Processes
- Scheduling Processes
- Scanning and Triggering Processes
- Utilising the Process Manager
- Purging Processes

Remote Client Features

- Understanding Synchronisation
- Viewing What's New
- Understanding Subscription
- Viewing the Sales Library