

Amending Sage 200 CRM

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In just two days learn the basic skills required to customise Sage CRM to meet your company's specific requirements.

Preparation :

You should be familiar with the operation of Sage 200 CRM (or Sage CRM) but you do not require a detailed knowledge. It would be useful to have a clear idea of your business requirements and how these differ from the 'standard' database supplied with the product.

Booking



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Amending Sage 200 CRM Course Content

Basic Concept

Gain an overview of how Sage 200 CRM can be customised, mastering the most commonly used tools, amending reports, adding and removing fields, dos and don'ts and setting up security and users.

Security

Learn how to setup, reassign, disable and delete users, setup passwords, password encryption and expiry, preferences, field and server security.

Field Customisation

Learn how to add new fields, modify existing fields and delete fields.

Screen and list Customisation

Discover how to add fields to screens, add custom content to lists and modify tabs

Data Management

Learn how to customise de-duplication screens, and upload data,

E-mail

Learn how to configure the e-mail settings, setup e-mail templates, aliases, set up e-mail management, attachments, Outlook integration.

Document Templates

Learn about document merging, creating templates and adding merge fields.

Reporting

Discover how to amend existing reports and create new ones.

Details

Duration: 2 Days
Times: 10AM to 4PM
Cost: £550+VAT
Lunch: Included



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