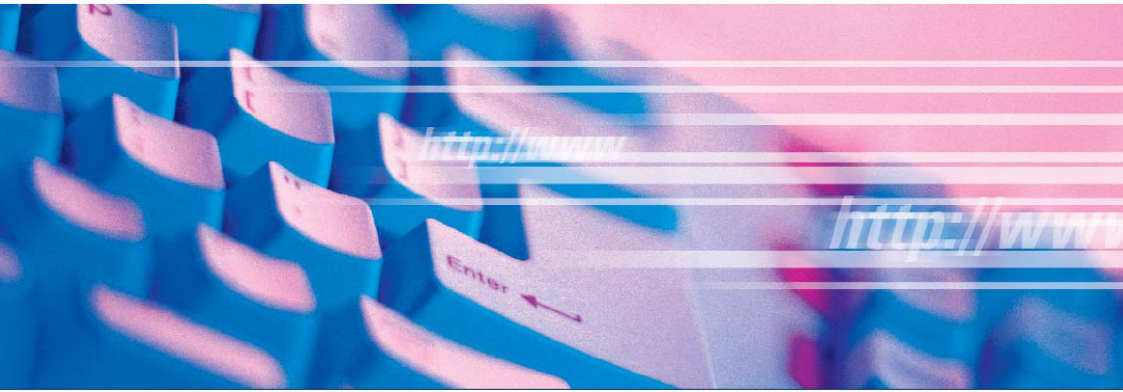


# CRM L4 Advanced Users - Rev 8 (CR48)



CREATING YOUR BUSINESS ADVANTAGE



## Training Course Overview

### Course Objectives:

The course will give existing CRM users the opportunity to expand on their knowledge of the CRM module. Concentrating on the advanced facilities, attendees will be encouraged to discuss realistic queries

### Who should attend?

Personnel who are responsible for marketing duties within a dealership, and/or who use, manage and maintain the CRM database.

### Prerequisites

This course is a Workshop and attendees are advised to bring questions and real to life examples with them. Attendees must have previously attended the CRM and Campaigns courses

### Programme

- System maintenance - altering sales executives, updating CRM record defaults, deleting letter batches and looking at file usage statistics
- Setting mandatory/advisable fields
- Setting up location security
- Miscellaneous options - department codes and other vehicle links
- Explanation of system parameters
- Setting up user access control
- Setting up statistics views
- Setting up team management
- Building spend analysis

### Duration

1 Day

Please visit our website or call the ADP Training department on 01635 214460 for further information or to book you place on the next available course.

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