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Welcome to Virtual Classroom!

We are glad you are here! Virtual Classroom is not a place; it's an experience. Talk with your trainer through Web chat or teleconference, watch recorded videos to see a demo and learn processes, and use the Hands-On Labs to practice each exercise on your own. Watch the orientation video to see how this works: www.tinyurl.com/slxhol.

Checklist:

On the morning of class, you should have the following resources:

- An invitation to the WebEx session sent to your e-mail address from messenger@webex.com. This invitation contains a link to join the WebEx session and teleconference information.
- A registration confirmation for the Anytime Learning course sent to your e-mail address from training.crm@sage.com.
- Your course workbook. We ship this book to you before class. Each exercise in your book has a 1:1 correspondence to a recorded video in your Anytime Learning course window.

What time does class start?

Find the schedule for your course in your confirmation e-mail or from the Course Details link in your My University profile. Start time on Day 1 is listed in Pacific Standard Time (PST) in your e-mail confirmation.

I'm up, I'm up! Now what do I do first?

On the morning of class, grab your coffee ("sip, ahhh"), and get comfortable at your computer. Log on to your Sage University profile to launch the Anytime Learning course window. Also launch a separate browser window for your WebEx Hands-On Lab session. Open your book, and connect to the orientation conference call.

How do I connect to the call?

Find the number to dial into the conference call in your WebEx e-mail. Alternatively, you can request a call-back from your trainer after you join the WebEx session. Your trainer's contact info is also included in the WebEx e-mail. If all else fails, contact our training coordinators at training.crm@sage.com or 888-765-6662.

What are we going to talk about on the call?

We want to introduce ourselves to you! Although most of the instruction is pre-recorded, our trainers stand-by to work you through the material for the duration of the course. If you have questions about the video/exercise format, this first morning call is a good chance to get acquainted. We can also address house-keeping items and technical difficulties.

Who else is on the call?

It depends. We run all of our Virtual Classroom courses simultaneously. Your workbook is adjusted for the class for which you registered, and it may differ from someone else on the call who registered for a different class. We meet for wrap-ups with each group at different times, so the discussion and curriculum will still be relevant to you.

Agenda

Because the format of this class is self-paced, note the recommended agenda for best use of your time.

Day 1 – Lessons 1-4

- Introduction to SalesLogix
- Accounts and Contacts
- Leads
- Opportunities

Day 2 – Lessons 5-9

- Campaigns
- Tickets
- Contracts
- Returns
- Defects

Day 3 – Lessons 10-15

- Lookups and Groups
- Calendar and Activities
- Notes, History, and Attachments
- Templates and Mail Merge
- Contact Processes
- Reports

Consider the Following:

In a technical training class, it's easy to get lost in the details. Our goal is to make sure you not only understand the details of how something works, but also WHY you need to know them. The "Consider the Following" questions are a good way to keep your mind focused on the bigger picture as you work.

Take a look at these questions now, and refer back to them as you work. When we reconvene as a group, we will tackle some of these questions in our discussion.

1: What is the difference between List view and Detail view? Are there any other viewing options available for a Main view?

2: Why might you see more accounts when you log on to SalesLogix than another SalesLogix user at your company might see?

3: How might you use SalesLogix to help you manage a large list of leads? What about a single lead?

4: What are some ways you could report on your opportunities—sales potential, average days open, and so on?

5: Does SalesLogix include any tools to actually help you create a marketing campaign? How do campaigns relate to CRM (contact relationship management)?

6 Do you have to track your time when working on a ticket? How does SalesLogix use this tracking data?

7: A customer wants to set up a service agreement with you that allows them to call you 15 times per year, regardless of the duration of the call. What kind of contract type in SalesLogix would be best in this case?

8: Returns work with assets—what is an asset? How can you add new assets in SalesLogix?

9: What is the difference between a defect and a ticket? How does SalesLogix differentiate between them?

Continued...

10: Other than managing your views of data, why else might you use groups in SalesLogix?

11: SalesLogix provides a number of ways to manage your upcoming activities. Why does SalesLogix also allow you to track an activity that already happened (a completed activity)?

12: What types of entries might you find on a contact's Notes/History tab?

13: What kinds of templates can you create in SalesLogix?

14: How could a contact process help a new sales person who is tasked with making a series of cold calls?

15: Getting data out of SalesLogix is sometimes just as important as getting data into the system. What options do you have for how you can deliver a SalesLogix report?

Answers to the "Consider the Following" questions are at the back of the course workbook.