Bpm’online CRM bundle functionality for end users

Target audience: This training program is intended for new users of bpm'online.

Training summary: Participants will receive key knowledge on the capabilities of the bpm'online platform, and product features and functionality.

The training takes place over 4 days with a total of 3-4 hours each session

Training program

Time	Subject
Day 1 (base features)	
11:00 AM – 11:15 AM	**Introduction to bpm'online products**
11:15 AM – 11:45 AM	**System interface and terminology** The bpm'online Academy - How to find answers
11:45 AM – 12:20 PM	**360 degree customer view** • Managing information about customers/partners/competitors in the [Accounts] section • Managing information about contacts and employees in the [Contacts] section
12:20 PM – 1:00 PM	**Database management** • Finding and merging duplicates • Populating contact and account data with Facebook data • Searching addresses using OpenStreetMap. • Setting up and synchronizing contacts with Google contacts • Synchronizing with Exchange contacts • Exporting data from the system and building Excel pivot tables for in-depth analysis **List customization**
1:00 PM – 2:00 PM	**Organizing and searching for data in the system** • Filter types: Quick, standard, advanced. • Creating folders and tags to segment the customer base • Adding aggregated columns t • Navigating the system via the command line • Customizing general and personal dashboards • Drill-down in charts and saving data to a file
2:00 PM – 3:00 PM	**Communication and daily task management** • Working with the calendar (visits, tasks) • Synchronizing tasks and meetings with Google Calendar and MS Exchange • Working with emails • Integration with telephony • Working with the notification center **Enterprise Social Network (ESN)** • Setting up the feed

Time	Subject
Day 2 (Marketing features)	
11:00 AM – 11:40 AM	**Managing leads** • Populating the base with leads • Registering and entering lead data • Entering need information • Managing channels, and sources • Managing lead stages and working by the built-in "Lead management" business process **Analytics**
11:40 AM – 12:20 PM	**Landing pages** • How to set up a landing page: overview and recommendations • How to automatically register leads from your landing page Examples of landing pages on the bpm'online website

12:20 PM – 1:00 PM	**Managing bulk email** • Integration with the bulk email service and licensing bpm'online marketing • Conducting one-time mass mailings • Adding a new bulk email and preparing a template in the new visual content designer • Populating the bulk email audience manually • Managing the bulk email parameters and adding UTM tags to track clicks • Bulk email results analysistrigger emails **Split-tests** **Pre-configured bulk email analytics**
1:00 PM – 1:20 PM	**Managing events** • Planning events, building a team and budget • Selecting a target audience • Organizing employees to prepare and conduct an event. Task log **Analytics**
1:20 PM – 2:00 PM	**Managing marketing campaigns** • Modeling communication with the campaign audience in the campaing designer • Modeling outbound and inbound campaigns • Launching and tracking campaign progress **Analytics**
2:00 PM – 2:20 PM	**Recommendations on preparing the system and data to improve the efficiency and quality of your bulk email** • Mandrill account reputation and the customer base relevance • Configuring emails to be sent on behalf of your company • How to avoid spam filters • Setting up an unsubscription macro • Managing subscriptions for various bulk email types • Setting up a limit for the number of emails sent to recipients Setting up integration with Mandrill for users on-site

Time	Subject
Day 3 (Sales features)	
11:00 AM – 11:15 AM	**Managing leads**
11:15 AM – 11:50 AM	**Managing a product catalog** • Categorizing products and using different measure units • Maintaining multiple price lists • Recording residues and reserving products in the warehouses • Single products selection window in orders and invoices Configuring multilevel product catalog and faceted search for products by catalog
11:50 AM – 12:50 PM	**Sales management** • Setting up opportunity stages • Building a sales team and a list of customer contacts • Recording and tracking the history of changes of sales manager tactics, competitors and their products • Opportunity history (stages, activities, invoices, orders, documents) • Conducting an opportunity through the "Corporate sale" business process • Sales manager efficiency analysis • Planning and analysis
12:50 PM – 1:50 PM	**Managing orders and invoices** • Orders in companies with both long and short cycles • Building the supply and payment chart, using a collection of themes and customizing new graphics templates • Approving and signing order conditions via internal signing
1:50 PM – 2:10 PM	**Managing contracts and documents** • A single list of contracts, additional agreements and specifications • Registering contracts in the system • Managing subordinate contracts: additional agreements and specifications Documents
2:10 PM – 2:40 PM	**Managing field sales** • Planning visits • Setting up field sales rules • Working with bpm'online sales mobile application
2:40 PM - 3:00 PM	**Managing projects** • Section purpose • Structure and usage specifics • Timing, project resource management, monitoring execution

Time	Subject
Day 4 (Customer Center features)	
11:00 AM – 11:20 AM	**Managing the service catalog** • The catalog of services and their characteristics • Consolidated financial statements for services rendered
11:20 AM – 12:20 PM	**Managing cases** • The organizational structure of the service center **Detecting and registering cases** • Recording key case information • Automatic registration of requests via incoming email • Registering of cases by incoming calls **Investigating and solving cases** • Case processing • Working with knowledge base **Analytics**
12:20 PM – 1:20 PM	**Agent desktop** • Overview • Queue management - organization of cases work flow
1:20 PM – 2:00 PM	**The self-service portal** • Setting up the self-service portal main page • Creating self-service portal users • Self-service portal user access rights • How to register a case