

CREATIO SALES FUNCTIONALITY FOR END-USERS CORPORATE TRAINING

Who should take this course: This training is designed for new end-users of the Sales Creatio product.

What to expect: Participants will obtain basic knowledge of the functionality, processes and tools in Sales Creatio.

Course duration & format: The training takes place over 1 day with a total of 8 hour. In-person or online.

Time	Topic
10 min	Introduction to Sales Creatio. Complete sales process management from lead to account.
20 min	Introduction to the Creatio interface and terminology <ul style="list-style-type: none"> • Creatio Academy. How to search the Academy.
30 min	360° Customer view. Single Contact and Account database. <ul style="list-style-type: none"> • Managing client/partner/competitor data in the "Account" section • Managing contacts and employee data in the "Contact" section
40 min	Database management <ul style="list-style-type: none"> • Duplicate search and merging • Setup and synchronization with Google Contacts (overview) • Exchange contact synchronization (overview) • Export into Excel
1 hour	Section Page list setup <p>Organizing and searching for data in the system</p> <ul style="list-style-type: none"> • Filtration types: quick, standard, advanced • Creating custom folders and tags • Adding aggregate columns onto the Section page • Command line use and setup • Building public and private dashboards • Drill-down in dashboards <p>Communication options and task management</p> <ul style="list-style-type: none"> • Calendar management (tasks, visits) • Synchronization with Google Calendar and MS Exchange • Email Synchronization • Telephony Integration • Notification Center • Corporate Social Feed (ESN) • Feed channel setup
40 min	<ul style="list-style-type: none"> • Feed channel setup
30 min	Product Catalog Management <ul style="list-style-type: none"> • Product categorization • Maintaining multiple price lists • Stock management • Product catalog in Orders and Invoices • Multilevel product catalog and faceted product search
10 min	Knowledge Base
1 hour	Lunch
40 min	Lead Management <ul style="list-style-type: none"> • Creatio lead management philosophy • Lead registration. Different methods of filling a lead database. • The lead management business process

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1 hour	<p>Opportunity Management</p> <ul style="list-style-type: none"> • Opportunity stage definitions • Creating sales teams and contact lists • Entering and tracking sales tactics. Competitors. • Opportunity History • “Corporate sales” out-of-the-box business process • Analyzing sales representative effectiveness
1 hour	<p>Forecasting and Planning</p> <p>Orders and Invoices</p> <ul style="list-style-type: none"> • Creating and using Orders for long and short sales processes’ • Installment plans and templates
20 min	<p>Approval Process</p> <p>Contracts and Documents</p> <ul style="list-style-type: none"> • Contract section: additional agreements and specifications • Creating Contracts • Parent and sub contracts • Document control
30 min	<p>Field Sales</p> <ul style="list-style-type: none"> • Site visit planning – field force in Creatio sales • Field Sales rules • Sales Creatio mobile application
10 min	<p>Project Management</p> <ul style="list-style-type: none"> • Section overview • Structure and specifics • Managing project resources, completion rates
50 min	<p>System Designer</p> <ul style="list-style-type: none"> • Changing colour schemes and logos • Universal Excel import • Adding new sections, fields, and details • Mobile application setup • User management • Using business processes • Printable forms in MS Word