

# 118-eT: Pivotal 5.9 Technology Foundations for End Users

## Overview

This online course, taught over 5 days in daily three-hour sessions, is recommended for customers who want to or are currently:

- Using Pivotal CRM.
- Training end users to work with Pivotal CRM.
- Supervising or supporting end users.
- Working as an end user.

## Audience

Beginner End Users

## Prerequisites

None

*If you have completed the 115-eT: Pivotal 5.9 Technology Foundations course prior to May 2007, you are not required to attend this class. This course was developed specifically for those students following the End User Tracks.*

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## Topics Covered

### Navigating within the SmartPortal

- Explain how relational database basics apply to the eRelationship system.
- Windows Access vs. Active Access.
- Determine when to click and right-click.
- Identify the elements of the SmartPortal Home Page.
- Search using eTab and iTab.
- Define forms and their fields and buttons.
- Manipulate lists and forms.
- Create shortcuts.
- Personalize the SmartPortal Home Page.
- Use eRelationship Help.

### Companies and Contacts

- View, enter and modify company and contact information.
- Link contacts to companies.
- Set Alerts.

### Scheduling Activities

- Use eRelationship to create and track Activities.
- View your Calendar and other's Calendars.
- Assign activities to other people on your sales team.
- Notify contacts and employees of important activities.
- Set Alarms and Links.

### Marketing Campaigns and Projects

- Create Marketing Campaigns and Projects.
- Link Marketing Projects to Campaigns.
- Understand and Track Estimated Total Revenue.
- Create an Action Plan.
- Link Activities to Marketing Projects.

### Leads

- Link a Lead to a Marketing Project.
- Explain Lead processing in eRelationship.
- Process a Lead into an Opportunity.

### Topics Covered, Cont'd.

#### Opportunities

- Create an Opportunity
- Assign a Sales Plan to an Opportunity
- Complete Milestones for the Sales Pipeline
- Create a Quote and Proposal for the Opportunity
- Create an Opportunity Influencer diagram

#### Queries and Static Lists

- Find and view queries
- Run a Query
- Copy and Rename Queries
- Create Static Lists
- Find and view static lists

#### LetterExpress

- Find, generate and modify LetterExpress documents
- Create your own LetterExpress templates
- Print, fax and email through LetterExpress

#### Reports

- Run and view reports
- Create basic eRelationship reports
- Format reports
- Print reports
- Export report information

#### Email Connector

- Send and export an email from Pivotal to Outlook
- Send and export and email from Outlook to Pivotal
- Viewing exported emails in Pivotal

#### Research Services

- Search for Pivotal data from within MS Office applications
- Insert/Copy Pivotal data into MS Office documents

#### Pivotal Resources

- Review the resources available to you