

Pivotal CRM 6.0 Technology Foundations for Customizers and Administrators Course (60115)

Audience: This course is essential for Pivotal CRM Administrators, Customizers and Power users. It may also be of interest to Business Analysts and Project Managers.

Duration: 4 sessions, 3 hours each

Location: Online

Price: \$1,250 per person

Prerequisites: No Pivotal CRM courses required.
This course is a prerequisite for the following courses:

- Pivotal CRM 6.0 Administration
- Pivotal CRM 6.0 Toolkit Customization

Course Overview

This course is the first within both the Administrator and the Customizer training tracks. During this class, students will learn about the key Platform and Application components of Pivotal CRM 6.0. They will briefly review the fundamental concepts behind the Pivotal CRM 3-tier architecture, and explore the Pivotal Client interface by working with functions available to end users. Typical examples of the Pivotal Sales, Marketing and Service Workflows will be demonstrated using the Pivotal CMS application. Students will listen to instructor presentations, watch the demonstrations and work through hands-on exercises designed to step them through the end-user work operations. Throughout the course, students will be able to demonstrate their knowledge of Pivotal Client by responding to short questions.

Course Agenda

Part 1 (day 1) – Pivotal Foundations

- Key Platform components of Pivotal CRM
- Pivotal CRM Applications
- Add-on Pivotal CRM products
- Pivotal CRM Integration options
- Introduction to the Pivotal CRM 3-tier architecture

Part 2 (days 2, 3) – Pivotal Client

- Pivotal Client Navigate components; Subjects, Topics and Portal Pages
- Pivotal Client Searching capabilities
- Static Lists
- Running Reports
- Exporting, Modifying and Importing Reports
- Generating documents using LetterExpress
- Creating LetterExpress Templates
- Pivotal CRM Integration for Microsoft Outlook: Send e-mail and schedule meetings
- Using Pivotal Contacts address book in Microsoft Outlook
- Using Client Forms
- Accessing Pivotal CRM Help

Part 3 (day 4) – Pivotal Workflow

- Examples of application business logic
- Creating Marketing Campaigns and Marketing Projects
- Creating, qualifying and processing Leads
- Creating and managing Opportunities
- Adding Milestones

- Generating Quotes and Proposals
- Processing Quote into an Order
- Working with Regions and Territories
- Creating Support Incidents and Support Steps