

# Maximizer CRM 10 User Training Course T101

## Who is this course designed for?

- New Maximizer CRM 10 users (All Editions: Entrepreneur, Group, Professional and Enterprise).
- Existing Maximizer Enterprise user (All Versions: Maximizer Enterprise 9.5, 8, 7.5, 6.0, 5.5) planning an upgrade to the current version or seeking training on an unsupported version.
- New Maximizer CRM administrators who want to know the fundamentals of the software before learning about administration.

## What is the course objective?

The objective of this course is to provide the user with a full understanding of the main contact management features of Maximizer CRM 10. Using demonstration data you will learn how to achieve all the common procedures through hands on exercises and instructions from one of our skilled Maximizer CRM trainers. Emphasis is placed entirely on the practical aspects to ensure you minimise your workload and stay in control of your own relationships with your clients' and in turn those of your company.

## What will you learn?

This course contains the following lessons and modules.

- Maximizer Core Concepts & Windows: An Introduction to the Address Book.
- Client & Contact Records: Create new accounts, companies, contacts & individuals.
- Using User Defined Fields: Profiling and segmenting your customers.
- Searching and sorting the address book: Basic Searching techniques.
- List management: building, updating and saving lists (favourite lists) of contacts in the address book, altering the fields displayed in a list.
- List usage: Mailing shot merges, cold call planning and operation, printing letters and labels.
- Notes and documents: Tracking interactions using notes and documents, searching and printing.
- Using the calendar and hot list window: Create personal to-do reminders, create associated tasks with address book entries, scheduling personal and multi-contact appointments.
- Create and apply an action plan template for effective time management.
- Email: using the email integration, constructing your signature and configuring email preferences.
- Searching and sorting the address book: Advanced search techniques and saved searches.
- List management: Enhancing view design and producing column reports from Maximizer.
- Creating relationships: Creating and using related entries.
- Combining, merging and moving address book records.

This is a standard course using a sample data set. All course delegates are provided with a set of instructional reference notes with sufficient space for note taking and a binder to store them in. Delegate understanding is reviewed throughout and tested by a short examination at the end of the course.

## Where is this course delivered?

- This course is delivered at the Head Offices of C.A.B.C. Limited in Newbury, West Berkshire (joining instructions and a map to our location will be sent to all delegates). We can accommodate up to six delegates per course.

## How long is this course?

- This course lasts 6 hours and runs from 0930hrs to 1630 hrs including lunch and breaks.

## When does this course run?

- We run this course 6 times a year (on average once every two months). You can check the date of the next course by reviewing the CABC events calendar and looking for course T101.

For more information, pricing or to make a booking, please contact CABC Sales on (01635) 570970 or visit the, [CABC CRM Shop](#) to buy online.