

# Maximizer CRM 10 Administration Training Course T104

## Who is this course designed for?

- New Maximizer CRM 10 administrators, power users or individuals who are responsible for setting up, configuring and maintaining one or more Maximizer CRM address books.
- **Recommended Pre-requisites: Maximizer CRM User Training (Course T101).**

## What is the course objective?

The objective of this course is to provide new Maximizer CRM address book administrators with the knowledge required to successfully create, run and maintain a new or existing Maximizer CRM 10 system.

Emphasis is placed on both the practical day-to-day tasks and on the correct planning of your CRM strategy to help administrators run successful trouble free systems.

## What will you learn?

This course contains the following lessons and modules.

- Maximizer Core Concepts & Windows: An Introduction to the Address Book.
- Introduction to Administrator: use of and access to the program.
- Creating new address books, changing the MASTER password, overview of address book preferences.
- Preparing a backup strategy – what options are available.
- User administration – creating new users, defining user access settings, security groups and teams. Overview of user preferences. Deleting users and disabling accounts.
- Address book design: creating and populating user defined fields, creating key field lists, defining system fields and making fields mandatory.
- Configuring Opportunities.
- Configuring Campaigns.
- Configuring Customer Service Cases.
- Installing a client.
- Configuring Outlook Synchronisation.
- Configuring Maximizer Email Services.
- Duplicate Checking.
- Global editing the database.
- Importing and exporting data.
- Maximizer System Defined Reports.

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 3 times a year (on average once every four months). You can check the date, of the next course by reviewing the CABC events calendar and looking for course T104.

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.