Level:	Undergraduate / Graduate	Duration:	4 x 3 hours
Technical requirements:	Internet connexion with standard compliant webbrowser	Contributors:	Jean-Paul Smets, Jacques Honoré

Description:

- The first goal is to **teach what is a CRM system** and to explain **what is a ticket and what is an event**.
- The second goal is to **teach universal workflows** associated to the tickets and events in a CRM system.
- The third goal is to **teach how to categorise your prospects**.
- The last goal is to teach **how to produce useful reports** in order to manage your sales efforts in an efficient way.

Session 1: Managing your contacts

- [Presentation of Careers and Assignments](#)
- [Tutorial 1: How to create persons](#)
- [Tutorial 2: How to create Organisations](#)
- [Tutorial 3: Linking persons and organisations](#)

Session 2: Tracking customer interactions - CRM Events

- [Presentation of incoming and outgoing events](#)
- [Tutorial 1: How to create Events in campaigns](#)
- [Tutorial 2: How to post outgoing events](#)
- [Tutorial 3: How to request someone to post](#)

Session 3: Organising the events - CRM Tickets

- [Presentation of Tickets and Campaigns](#)
- [Tutorial 1: How to create campaigns](#)
- [Tutorial 2: How to process incoming events](#)

Session 4: Create CRM reports

- [Tutorial 1: Create Reports](#)
- [Tutorial 2: Create Gadgets](#)

Evaluation: Categories customisation

- [Evaluation Document](#)
- [Evaluation Spreadsheet Sample](#)
- [Evaluation Spreadsheet Template](#)