

Course Curriculum 2022/2023

Sage CRM Training Catalogue

Sage is committed to your success. Whether you are a professional, have experience with Sage products, or are just starting, our training options will help you contribute to your company's overall success. Training can be found on Sage University: **www.sageu.com/SageCRM**

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Available training methods:

Anytime learning packages

Instructor-narrated step-by-step videos bundled together into one package.

These packages are either:

- single-user
- or company-wide subscriptions and are valid for 12-months.

eBook learning packages

eBook based self-study training.

These training packages solely consist of an eBook or Hardcopy option.

Sage Business Care Plan training discounts:

Platinum plan

100% discount on Anytime learning packages

Gold plan

100% discount on Anytime learning packages

Silver plan

10% discount on Anytime learning packages

New to Sage CRM?

Start here:

Sage CRM - Fundamentals

Get the essential knowledge and skills necessary to work with the Sage CRM. Learn how to work with the My CRM Dashboard, navigate the program, and use the calendar and email.

Learning package:
Duration: +3hrs
Price: **FREE**

Become a Pro in Sage CRM

We have a wide selection to help you with your journey.

Sales specialist

Learn about the Sage CRM sales process, such as leads, quotes, opportunities, and forecasting. In addition, you will learn how to gather and use consent from leads to help provide data protection for your customers.

Course Outline:

- understanding the sales process
- how to create leads
- gathering consent
- using consent
- how to convert a lead to an opportunity
- how to work with opportunities
- how to create quotes and orders
- how to generate a quote document
- How to close an opportunity
- How to forecast
- How to forecast - for the sales manager

Learning package:
Duration: +1hr
Price: $59
(FREE to platinum and gold business care customers)

Customer service specialist

This learning package provides topics that teach you about the key tasks in Sage CRM associated with customer service. The training includes understanding the support process in Sage CRM and how to create and work with cases.

Course Outline:

- understanding the support process
- how to create cases
- how to progress and close a case
- how to create and link solutions

Learning package:
Duration: +30mins
Price: $19
(FREE to platinum and gold business care customers)

System administrator: Understanding security and system management

Learn the essential system administrator functions like setting up users, teams, security, mobile access, and creating dashboards

Course Outline:

- how to set up users
- understanding security
- work with teams
- understanding mobile access
- how to create and assign dashboards

Learning package:
Duration: +2hrs
Price: $199
(FREE to platinum and gold business care customers)

System administrator: Understanding document and product management

Learn the system administrator functions like creating and monitoring documents, creating email templates, product management, library management, and performing data uploads.

Course Outline:

- how to create and monitor documents
- how to create email templates
- understanding product management
- understanding library management
- how to perform data uploads

Learning package:
Duration: +3hrs
Price: $199
(FREE to platinum and gold business care customers)

Advanced:
Customizations, workflows and escalations

This self-study eBook course will teach you how to create custom data fields and modify and create data screens and custom entities. Workflow and escalation functionality will also be covered.

Course Outline:

- learn how Sage CRM screens and fields functions work
- understanding the methods to personalize a Sage CRM installation
- how to create and use workflows and escalations
- demonstrate the creation of new entities in both on-premise and cloud Sage CRM

Learning package:
Duration: 9hrs
Price: $75.00

Advanced:
Reports, views and dashboards

This course will teach you how to create Sage CRM reports and views, including discussing the CRM SQL database structure. You will also learn about dashboard functionality.

Course Outline:

- how to create Sage CRM views and join application tables
- how to use custom views to draw and filter data
- how to create custom reports
- understanding the classic and interactive dashboards
- how to design the classic and interactive dashboard

Learning package:
Duration: 3hrs
Price: $75.00

Advanced:
Marketing, self-service and email management

In this course, you will learn how to use advanced features of CRM to set up marketing automation and campaign management. Learn how to set up outbound call handling and how users work through outbound call tasks. In addition, we will discuss self-service functions, including web leads and the capabilities of the self-service API.

Learning package:
Duration: 4hrs
Price: $75.00

Already a Pro in Sage CRM?

Learn about the latest features

New product releases and updates

Did you know? With each version release, we create a what's new video so that you can learn more about the new feature(s).

Price: FREE

Integration Courses

Learn about how to integrate Sage CRM to Sage 100 or 300

Integrating Sage 100 with Sage CRM

This course provides instruction on how to integrate Sage CRM with Sage 100. You will learn what software is required, how to install Sage CRM and perform the essential integration steps.

Course Outline:

- understanding Sage CRM installation requirements
- how to install Sage CRM – 1
- how to create the required role and user for Sage CRM
- how to configure the Sage 100 company
- how to configure the Sage CRM service options
- how to set up the Sage CRM company options
- how to perform salesperson mapping
- how to verify the Sage CRM integration

Learning package:
Duration: +1hr
Price: $89
(FREE to platinum and gold business care customers)

Integrating Sage 300 with Sage CRM v7.3

This course provides instruction on how to integrate Sage CRM with Sage 300. You will learn what software is required, how to install Sage CRM and perform the integration steps required.

Course Outline:

- overview of integration with Sage CRM
- understand the prerequisites
- how to install Sage CRM
- how to install the integration software
- how to configure Sage 300
- ow to confirugre Sage CRM
- how to verify the Sage CRM integration

Learning package:
Duration: +1hr
Price: $89.00

Integrating Sage 300 with Sage CRM 2018 R3 and higher

This course provides instruction on integrating Sage CRM with Sage 300 2020. You will learn what software is required, how to install the Sage 300 and Sage CRM integration components, set up the communication between Sage 300 and Sage CRM, and use the new functionality in Sage CRM.

Course Outline:

- understand the setup prerequisites
- installing the integration
- Sage 300 web API security
- Sage CRM setup
- workstation setup
- integration component
- synchronizing currencies
- importing data
- synchronizing data
- Sage 300 user and database-level security
- quotes to orders
- promoting to Sage 300
- inquiry screens with Sage CRM

Learning package:
Duration: +2hrs
Price: $89
(FREE to platinum and gold business care customers)

Integrating Sage 300 with Sage CRM 2019 R2 – 2020 R1

This course provides instruction on integrating Sage CRM with Sage 300 2020.1. You will learn what software is required, how to install the Sage 300 and Sage CRM integration components, set up the communication between Sage 300 and Sage CRM, and learn how to use the new functionality in Sage CRM.

Course Outline:

- understand the setup prerequisites
- installing the integration
- Sage 300 web API security
- Sage CRM setup
- workstation setup
- integration component
- synchronizing currencies
- importing data
- synchronizing data
- Sage 300 user and database-level security
- quotes to orders
- promoting to Sage 300
- inquiry screens with Sage CRM
- multiple contacts with Sage CRM

Learning package:
Duration: +1hr
Price: $89
(FREE to platinum and gold business care customers)

Best value for money training packages:

Sales specialist: complete package

This learning package consists of the following learning packages at a discounted rate:

- Sage CRM - Fundamentals
- Sage CRM - Sales Specialist

Topics/Videos: +36
Duration: +3hrs
Price: $149
(FREE to platinum and gold business care customers)

Customer service specialist: complete package

This learning consists of the following learning packages at a discounted rate:

- Sage CRM - Fundamentals
- Sage CRM - Customer Service Specialist

Topics/Videos: +29
Duration: +3hrs
Price: $129
(FREE to platinum and gold business care customers)

System administrator: complete package

This training consists of the following learning packages at a discounted rate:

- Sage CRM – System Administrator: Understanding Security and System Management
- Sage CRM - System Administrator: Understanding Document and Product Management

Topics/Videos: +2
Duration: +5hrs
Price: $199
(FREE to platinum and gold business care customers)

Advanced user: complete package

This training consists of the following learning packages at a discounted rate:

- Sage CRM – Advanced user: customization, workflows, and escalations
- Sage CRM - Advanced user: reports, views, and dashboards
- Sage CRM - Advanced user: marketing, self-service, and email management

Duration: 19hrs
Price: $1 359
(FREE to platinum and gold business care customers)

Sage University instructions:

Follow these step-by-step instructions to sign up online:

1. Visit **www.Sageu.com/SageCRM**

2. New to Sage University? Select your product and then **Create a profile**.

3. To create a Sage University profile, you will need to log on to your **Sage account**.

4. If you don't already have a Sage account, you can create one using the "**Create account**" link found at the bottom of the login page.

5. You will need access to your email to retrieve a validation code to create your Sage account.

6. **View FAQs** about your Sage account login to learn more.

7. Once you've logged on to your Sage account, complete the Sage University profile creation form and **get started**!

   NOTE: Creating a Sage University profile is a one-time task. Once complete, you will log on to access Sage University

For help navigating Sage University, email **SageUniversity@Sage.com**.

Sage account versus Sage University profile

Your Sage account allows you to access different Sage products and services through a single log-on.

Fewer passwords to remember are a win for everyone!

Your Sage University profile is your personal record of training, badges, and certifications completed on Sage University.

Price disclaimer:

Prices and availability are subject to change without notice. While we strive for accuracy, mistakes happen. In the event of an incorrect price on a quote or order, you will be notified by email or phone and given the option to accept the corrected price or cancel the order.


Savings


Favourite with our customers

sageu.com
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