ADILAS TRAINING COURSES – EXPLORING BUSINESS FUNCTIONS

CLASS 5 – CRM & FLEX GRID

WELCOME:

* REVIEW POS:
  + Follow up questions
  + Creating a button:
* CRM – CUSTOMER RELATIONSHIP MANAGEMENT:
  + People you service
    - Customers, clients, patients, students, contacts, etc.
  + What do you need to keep track of with your people?
  + CUSTOMER LOG:
    - Look for the links
    - MORE OPTIONS button
  + Some CRM Tools:
    - Log Notes
      * Track all needed happenings with your people
    - Follow-up
      * Need to follow-up on things with people
    - All Receivables
      * Invoices, items purchased, etc.
    - All Time
      * Any associations tied to time
    - Etc.
* CRM EXAMPLES & SCENARIOS:
  + Class ideas & examples
  + Walk through scenarios
* FLEX GRID:
  + Flex Grid Map
    - Useable on the 12 Main Players in Adilas
  + Needs a HOST object to hold the flex grid
  + 3 Main Uses:
    - Additional notes on any object
    - Tying objects together – buddy system
    - Customized data fields
* FLEX GRID CUSTOM FIELDS:
  + Come up with a class example
  + Plan it out!
  + Accomplish it in adilas
* ASSIGNMENTS:
  + Practice, Practice, Practice!
  + Come up with your own scenarios and play with customer & flex grid features!