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!