



User

Course Duration:

1 day of classroom based hands on instructor-led training.

Course Summary:

This course is an introduction to ProEngage and covers the main aspects of the system, from recording activities and scheduling actions through to converting enquiries into opportunities and producing quotations.

Who should attend:

This course is aimed at anyone within the organisation who wants to use ProEngage.

Level:

This course can be tailored to cater for all levels of user, from invoice to advanced. No previous experience of ProEngage is necessary, however even experienced users will benefit from the training.

Pre-requisites:

Delegates should:

- Have a basic knowledge of using computers

Course Content:

The course focuses on:

- Organisations
- Contacts
- Activities
- To Do Lists
- Enquires
- Opportunities
- Bulk Mailing

Specific topics covered within the course:

- Editing Organisation Data
- Creating New Organisations
- Familiarisation with sorting & filtering data
- Editing Contact Data
- Creating New Contacts
- Creating Activities & Follow Up Activities
- To Do Lists
- My Activities
- Entering Enquiries via the Web App
- Adding Activities to Enquiries
- Creating Opportunities from Enquiries
- Adding Activities to Opportunities
- Quotes
- Bulk Letters
- Bulk Emails

Call **01928 725522** today or visit: www.compasscc.com/training

Administrator

Course Duration:

1 day of classroom based hands on instructor-led training.

Course Summary:

This course shows system administrators how to set up and configure ProEngage for use within their college.

Who should attend:

Users who are responsible for the management and administration of ProEngage.

Level:

This course is aimed at more experienced ProEngage users. A prior knowledge of the user side of the system is required.

Pre-requisites:

Delegates should:

- Have a good understanding of the user side of ProEngage
- Ideally already have attended the ProEngage: User training course

Course Content:

The course focuses on:

- Reporting
- Building Reports
- Emails
- Security

Specific topics covered within the course:

- Viewing reports using the Windows user interface
- Format and Layout of Standard Reports
- Data & Grouping on Standard Reports
- Exports
- Graphs
- Letters
- Creating Email Templates
- Creating HTML Emails
- Email History
- Creating new Users
- Maintaining users access permissions to the system
- Customising Validation Rules & Defaults