

## STANDARD EFFICACY BASICS TRAINING

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### Scope

This hands-on training on a standard Efficacy training database presents the basic modules of Efficacy. It **teaches** the participants to use the main features of the basic modules (**Companies, Contacts, Projects, Agenda, Task List, Documents, E-mails**) in order to get them started with the day-to-day work in Efficacy.

The **other modules** (Templates, Queries, Products, Opportunities, Profiles, Marketing, Helpdesk, Timesheet) can be **briefly shown** but will not be taught.

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### Target

End users with no or little experience with Efficacy.

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### Required knowledge and aptitudes

Basic knowledge of Internet usage is required.

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### Number of participants

Minimum 2, maximum 6.

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### Duration

4,5 to 6 hours according to the level of the users and whether the last parts must be seen (see Contents).

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### Contents

- Introduction
  - About CRM
  - Efficacy's data model
  - My Day in Efficacy
- Getting Started
  - Login
  - My Day in Efficacy
  - Searching for a card
- Companies
  - The structure of the cards
  - Viewing the items linked to a card
  - List-related features
  - Categories and custom fields
  - Adding a Company card
  - Marking a card as Favorite
  - Editing a card
  - Linking a Contact to a Company

- Contacts
    - The structure of the cards
    - Editing the link between Companies and Contacts
    - Marking a Company as a Contact's former employer
    - Creating a Task from a Contact card
    - Creating a Call-Back Task
    - Creating a Document from a Contact card: launching a Template
  - Projects
    - List of current Projects
    - The structure of the project cards
    - Adding a Project in a tree of Projects
    - Adding an Appointment starting from a Project
  - Agenda
    - Navigating in time; Agenda Views
    - Creating an Appointment
    - Viewing the Agenda of a co-worker
    - Creating an Internal Meeting
    - Creating a Recurring action
    - The Invitation scheme
  - Task List
    - Past undone Actions
    - Delegating a Task
  - Intermezzo: Notifications
  - Documents
    - Searching for a Document
    - Working with Attachments: revisions / transforming in PDF
    - Inserting an attachment
    - Sharing a record: features (linking, notifying, securing, send by email, follow-up)
  - Emails
    - Sending from Efficacy
    - Sending from Outlook
    - Uploading into Efficacy
    - Meeting invitations and Notifications
    - What is a Discussion Thread?
  - Where can I change my Options?
  - *[Optionally: Overview of all other modules]*
    - *Products*
    - *Opportunities*
    - *Profiles*
    - *Marketing Manager*
    - *Helpdesk*
    - *Timesheet*
    - *Queries*
    - *Templates]*
  - *[Optionally: Enhancing your user experience]*
    - *Configuring your workstation*
    - *Installing the Sidebar and the Office integration]*
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### **Training support**

On-screen PowerPoint presentation and live use of a standard Efficacy training database.

The trainees use online handouts of the presentation during the training. These online handouts are available through the Efficacy Helpdesk.

Upon request, printed versions of these handouts can be provided for use during the training. For environmental reasons, this service will be charged.

On-line manuals are available on <http://help.efficacy.com>.

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### **Available languages**

The training can be given in English, French, Dutch or German.

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### **Certificate**

This training and about a month of practice suffice to attend the Efficacy Basics Exam in order to obtain the Efficacy Basics Certificate.

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