

## EFFICACY TEMPLATES TRAINING

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### Scope

This hands-on training on a standard Efficacy training database presents the Templates Wizard. It teaches the participants to create Document Templates and E-mail Templates in MS-Office and to use them and share them in order to ensure homogenous and automated company communications.

It does **not** cover the use of runscripts in templates.

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### Target

End users who master the basic Efficacy features – ideally, with a month's experience using Efficacy in order to make this training more effective.

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### Required knowledge and aptitudes

Knowledge of the Efficacy database fields and data model is necessary. Basic knowledge of MS-Word, MS-Excel and MS-Outlook is also required.

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### Number of participants

Minimum 2, maximum 6.

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### Duration

4 hours (can be reduced to 3 if the participants have a good level and if the grid of products should not be seen – see Contents)

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### Contents

- Introduction
  - Efficacy Data Model
    - Standard fields vs. Custom fields
    - Main tables, secondary tables and relation tables
  - What is an Efficacy Template?
    - Available tables
- Creating a Template in Word
  - Inserting fields
    - Formatting Dates
  - Inserting functions
    - Conditional Values
  - Saving in Efficacy
- Launching a Template
- Creating a Template in Excel
  - Inserting the invoicing address
  - Inserting a database value
- Sharing a Template
  - Configuring for Instant Documents

- Creating a Template in Outlook
    - Use as Instant Email
    - Use for e-mailing
  - *[optionally: Inserting a grid of Products in a Word template]*
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### **Training support**

On-screen PowerPoint presentation and live use of a standard Efficacy 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 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**

Not available yet.

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