



# CRM Phase 1

## Database Management (CRM01)

### Course Objectives

Attendees will gain an understanding of the CRM module and how it integrates with the Autoline System. Providing attendees with the initial knowledge and skills to effectively use, manage and maintain the CRM database.

### Who should attend?

Personnel who are responsible for marketing duties within a dealership, and/or who use, manage and maintain the CRM database.

### Prerequisites

Attendees must have keyboard/mouse skills.  
This course is in conjunction with other courses in the series.

### Programme

- Managing your CRM desktop tasks
- Searching for CRM records
- Creation of customer, company and vehicle records and understanding their relationships
- Recording of extra customer information
- Using audit control to manage amendments to CRM records
- Reviewing CRM customers within the CRM desktop
- Running database cleansing reports
- How to delete CRM records
- Assistance with minimum standards in CRM record creation
  - Attaching customers to company records
  - Detaching customer from company records
  - Adding CRM notes
  - Attaching vehicles to customer records
  - Detaching vehicles from customer records

### Duration

1 Day

### Starting time

9 am

### Cost per course

R1 147.98 per person