



SalesOutlook

Information the way you want it when you need it.

SalesOutlook User Training *eWorkshop Course Syllabus*

General Overview

- Introduction
- Navigation
- Using the Toolbar
- Using Find options

SalesOutlook Toolbar

- Creating records
- Performing actions – Switch to folder
- Search

Working with the Account Record

- Create a new account
- Find/Edit an existing account
- Assigning accounts
- Power User Interface

Working with the Contact Record

- Create a new Contact
- Find/Edit an existing Contact
- Open Contact from email

Working with Opportunities

- Review Sales Process Stages & Checklists
- Adding an Opportunity
- Editing

Working with Tasks and Appointments

- Create new Tasks
- Assign Tasks
- Create a new appointment

Reporting Options In SalesOutlook

- Printing a SalesOutlook report
- Exporting report data