



Pick and Mix Training
InterAction® Training to suit you

NEW COURSES

Lexis InterAction® Pick and Mix Training

There is recognition that technology can facilitate smooth business operation and efficiency. A number of firms have a fully operational Client Relationship Management (CRM) system in place to underpin business development initiatives. ROI can increase as the skill levels of those who use the system improve therefore its vital users are trained appropriately.

There are many challenges in obtaining approval for standard off-the-shelf training courses, especially where budgets and expenditure are constantly under review. This is why **Lexis InterAction** has created multiple bite-sized courses where you can pick and mix sessions to suit your requirements and ensure maximum value is achieved.

The Pick and Mix approach

The pick and mix approach ensures you get the training you need, when you need it and in small digestible sessions with a consultant from the Lexis InterAction Professional Services team.

Delivery

Each training session lasts 90 to 180 minutes with a day's training compiled of 4 units (1 unit for a 90 minute course, 2 units for a 180 minute course). Training can be delivered remotely or in a classroom environment by one of our certified trainers using the client's own InterAction system. Sessions can be in groups or on a one-to-one basis. Each session can cater for a distinct set of users allowing for flexibility throughout the training day; CRM Manager's and super-users might attend sessions in the morning and then data stewards and secretaries might attend sessions in the afternoon. It does not have to be the same individuals who attend the full day.

Certification

By the end of the training, certificates will be awarded to attendees who demonstrate that they have met the learning objectives of the chosen course.

Courses

New courses can be developed according to a client's specific needs, popular pick and mix sessions include:

- **Activities and Appointments Configuration** – Delve into the functionality and configuration options of Activities and Appointments
- **Application Collaboration*** – This course demonstrates how to use Application Collaboration to pull external data into InterAction. It shows how to use CSV files to harvest data and explores the use of SQL Server Studio
- **Data Change Management Configuration*** – See how the elements of Data Change Management (DCM) fit together and learn how to configure DCM for your business processes
- **Dealing with Data Change Management Tickets** – Explore best practice guidelines and tips for dealing with DCM tickets
- **Exporting Data** – Showing the steps required to use InterAction exporting features
- **Find and Replace** – A practical overview of Find & Replace and replace unknown Countries features, including examples and useful tips
- **Folder Dependency Analyser** – Discover how the Folder Dependency Analyser tool provides the means to move people and companies around InterAction folders based on business process rules
- **Import Features** – A review of the basic importing feature within the InterAction Windows Client including all the various options available
- **InterAction Administrator Client Overview*** – A tour of the main features and options in Administrator Client
- **InterAction Architecture Training*** – An introduction to the architecture of the InterAction application from an IT perspective
- **InterAction for Microsoft Outlook (IMO)** – An under the covers look at the functionality included in InterAction for Microsoft Outlook (IMO)

- **InterAction Fundamentals** – An introduction to CRM and InterAction fundamental concepts
- **NEW International Correspondence Features** – An introduction
- **Merging Contacts and Contact Information** – Providing insight into merging duplicate contacts and associated information plus highlighting the pitfalls to watch out for
- **New Features and Functions in v6.0 and v6.1** – An overview of the latest features and functions of InterAction version 6.0 and 6.1
- **NEW Profiles Configuration** - Learn how to configure the InterAction Profiles and receive guidance on best practice when configuring and using the Profiles
- **NEW Reminders** - Learn how the InterAction reminders functionality can be used to benefit your firm, also learn how to configure the feature and set it up for users to start using it
- **Reporting: Advanced** – Working with more advanced functions and calculations in the Report Designer
- **Reporting: Intermediate** – Discover how to work with overview reports, report sections and learn how to manipulate report data into the correct layout
- **Reporting: The Basics** – An introduction to InterAction reporting, the underlying principles and basic features
- **Scheduled and Continuous Processes** – This course demonstrates what each scheduled and continuous process does, how the process manager processes work and how they can be scheduled as well as providing best practice guidelines
- **Smart Connect and Synchronisation Options** – Learn how Smart Connect works and how to apply your configurations
- **Support Site Overview** – Discovering how to make best use of the InterAction support website
- **Web Client and Outlook Toolbar (non-IMO) Overview** – Demonstrating the Outlook InterAction toolbar as well as main features and functions of the InterAction Web Client
- **NEW Web Client Search Form Configuration** - Learn how to configure the InterAction Web Client Search Forms and receive guidance on best practice when configuring and using the forms
- **Windows Client Searching** – Discover how to perform effective searches for contact and company data in InterAction Windows Client

*Courses marked with an asterisk are 2 units/180 minutes.
All other courses are 1 unit/90 minutes.

More courses will be made available soon, for more information contact salesinfo@lexisnexis.co.uk, call **+44 (0) 1132 262 065** or contact your Client Advisor for further information. LexisNexis can also offer bespoke training. If there is specific training you wish to cover and it does not appear in the list please get in touch, we'll be happy to assist.

For more information

To find out more about [Lexis InterAction® Pick and Mix Training](#) and to discuss your company's specific business requirements, please visit www.lexisnexis.co.uk/enterprisesolutions, email salesinfo@lexisnexis.co.uk or call [+44 \(0\) 1132 262 065](tel:+44201132262065) to speak to a LexisNexis Enterprise Solutions consultant.



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