Staff Training and Training Videos

Sales 02 Training for Sales & Events = ERM Customer Detail Page

The ERM is ICONIC uniquely designed software program that all Sales and Events Staff will use in their work.

There are many features and functions of the ERM. One in particular that will be associated with most of your daily work tasks is the **Customer Detail Page**. This part contains all the customers details, account, order, history and documentation.

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SALES / EVENT TRAINING VIDEO about the ERM Customer Detail Page.

Training Video = ERM - Customer Detail Page

As part of this part of the training we also recommend you read the FAQ and KB about the ERM. You may have already view the manuals of the ERM from a previous training session. If this is the case, you do not need to view them again here to unless you are re-training or refreshing your understanding. To view the manuals for the ERM, please click here.

We recommend the following additional FAQs for you to read and become familiar with as part of your job and work.

- Customer Status. What is Active and Inactive do on the Status of a customer or company?
- Do we have to create a new account even if the customer asks to talk to someone else or do we need to create it after at least having single communication with the new person?

After viewing and understanding this training session remember to acknowledge receipt of completion of the training by following the company procedure of How to acknowledge you have completed part of your training or state you have viewed or read a FAQ

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Attached files:

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