Staff Training and Training Videos

Sales 04 Training for Sales & Events = Add a New Customer or New Company

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.

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SALES / EVENT TRAINING VIDEO about the ERM Adding a New Customer.

Training Video = ERM - How to Add a new Customer or Company

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 on **Adding a new Customer**, please click here.

We also recommend that you read as part of your training the following FAQs:

- Add a New Customer to an Existing Company
- Add a New Customer with a New 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?
- How do I search for a customer on the Search / Lookup a customer?

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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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