

Interactive CRM Software Learning Path

1

Introduction to CRM

Learn the basics of CRM software and its impact on business processes.

☐

Mark as complete

2

Setting Up Your Account

Explore how to create and configure your CRM account.

Choose setup guide

3

Contact Management

Practice adding, editing, and organizing contacts within the CRM.

Add a contact name

4

Tracking Interactions

Learn to log calls, emails, and notes with contacts.

Log interaction notes

5

Sales Pipeline Overview

Understand the stages of a sales pipeline and how to move deals forward.

Pipeline Stage

6

Reporting & Analytics

Discover how to create and interpret CRM reports.

☐ Basic Reports

☐ Advanced Reports