

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.

3 Contact Management

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

4 Tracking Interactions

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

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