



Relate DRIVE CRM & Practice Management – Training Course Brochure

Our training course for all users is designed as a “hands on” tutorial led experience, which once completed will allow you to carry out all of your work with added confidence.

To get the best return from your software investment and to improve staff efficiency we would recommend that you attend our training course.

Benefits

- Extensive tutorial based manual with case studies
- Trainers selected from our support team, experts in our software
- Lunch & Training material included
- Modern classroom facilities
- Small groups (Maximum of 9 people)

Dates, Location & Fee:

This course is run the middle Monday of the month from 9.30 to 16.00 in our head office in Dublin 24.

The training course fee is €245 (VAT Exempt). To book visit www.relate-software.com or email training@relate-software.com

Terms & Conditions

Rescheduling:

There is a minimum of 5 confirmed attendees on the course in order for it to go ahead. If cancelled, you will receive an email at least 72 hours prior to the date of the course notifying you of the cancellation. You will then receive a phone call from one of our team re-scheduling the training course with you.

If you need to cancel we will endeavour to reschedule your training initially, however if it is not possible to reschedule and you need to cancel, these are the related charges:

Less than 7 days notice there will be no refund of fees

Greater than 7 days notice but less than 14 days notice then you will receive a 30% refund (€73.50)

Greater than 14 days notice you will receive a full refund (less an administration fee of €50)



Course Content

TUTORIAL 1 – System Navigation

Menus, Toolbars, Column Selection, Filters, Sorts and Grouping

TUTORIAL 2 – Staff Setup & Access Groups

Setting up staff, accountable units, charge-out rates, timesheet monitoring & access groups

TUTORIAL 3 – Client & Contact Setup

Setting up clients & creating Other Information tabs/fields

TUTORIAL 4 – Diary, Tasks & Communication & Holiday Leave Planner

Setting up meetings, tasks, follow up, alerts and staff leave planner

TUTORIAL 5 – Books In and Deadline Management

Books in and setting up deadlines, assigning to clients and managing through Diary or Client/Staff Deadline's

TUTORIAL 6 – Timesheets & Expenses

Posting timesheets and staff (direct) or 3rd party (indirect) expenses

TUTORIAL 7 – Bill Templates, Billing & Accrued WIP

Creating a bill template, creating bills, allocating bills to time & expenses

TUTORIAL 8 – Receipts, Credit Control, GDPR & Budgets

Recording receipts, GDPR and creating fees and cash budgets

TUTORIAL 9 – Reports

How to run reports; edit reports, export to excel or pdf

TUTORIAL 10 – Email Setup, Office Send To Drive/Outlook Email AddIn

Email account settings, installing the office send to DRIVE addin and the email addin and how/why to use one over the other



Course Schedule

From	To	Mins	Module/Function
09:30	09:35	5	Introduction to Trainer and DRIVE CRM (incl. course objectives)
09:35	10:05	30	System Navigation, Menu's, Filters/Sorts and Grouping
10:05	10:30	25	Staff Setup & Access Groups
10:30	11:30	30	Client & Contact Database (incl. Other Information)
11:00	11:15	15	Break
11:15	11:55	40	Diary, Tasks & Communication & Holiday Leave Planner
11:55	12:05	10	Books In
12:05	12:45	40	Deadline Management
12:45	13:15	30	Lunch
13:15	13:45	30	Timesheets & Expenses
13:45	14:30	45	Bill Templates, Billing & Accrued WIP
14:30	14:45	15	Email Setup
14:45	15:00	15	Receipts
15:00	15:30	30	Credit Control, GDPR & Budgets
15:30	15:45	15	Reports
15:45	16:00	15	Office Send To Drive/Outlook Email AddIn



Frequently Asked Questions

1. How long is the course?

The Course is a 1 day course and it starts at 9:30am and finishes at approximately 16:00pm

2. What is the course fee?

The full training course fee is €245 per person. This Training is VAT Exempt. Fees may be paid by Visa Debit, Credit Card, Cheque or Bank Transfer.

3. When does the course run?

The course is run the middle Monday of the month (minimum quota of 5 people).

4. Do I need to purchase any materials or books for this course?

No, all required course materials are included in the course fee

5. How many people are there in each class?

The course is run in small groups, with a maximum of 9 people

6. What do I need to do if I cannot make it to the course?

It is best to reschedule your training as soon as possible, you can do this by contacting us by phone on +353 1 459 7800 or by sending us an email to training@relate-software.com

However if it is not possible to reschedule and you need to cancel, these are the related charges:

- Less than 7 days notice there will be no refund of fees
- Greater than 7 days notice but less than 14 days notice then you will receive a 30% refund (€73.50)
- Greater than 14 days notice you will receive a full refund (less an administration fee of €50)

7. Where is the course held?

The course is held at the Relate Software office at Unit D6 South City Business Park, Whitestown Way, Tallaght, Dublin 24, D24 P940.

Parking: There is ample free parking.

Public Transport: If you are coming by public transport the location is serviced by bus routes 77a & 65b and Luas – Red Line, Tallaght stop, 20 min walk.

**Attendees requiring accommodation can avail of our corporate rate with the Maldron Hotel, 15 minutes walk from Relate training centre.

