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

- Online training facilities
- Extensive tutorial based manual to download
- Trainers selected from our support team – experts in Relate DRIVE

Courses are ran every second Monday & Friday of the month from 09:30 to 16:00. All courses are now being ran online using Go-To Training. This site gives our customers easy access to our training courses, just click on the link you receive, register your details and your ready to join the training.

The training course fee is €245 VAT Exempt. To book visit https://www.relate-software.com/drive-online-booking/ or email training@relate-software.com.

Terms & Conditions

There are **NO** refunds offered on training.

Rescheduling:

If you need to Reschedule the course you can email training@relate-software.com and they will advise you of the next available dates for the Relate DRIVE course.

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 then we can offer you Credit for the amount paid for training.

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	11:00	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	15:54	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 it starts at 09:30am and finishes at approximately 16:00pm

2. What is the course fee?

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

3. When does the course run?

The course is ran online on every second Monday & Friday of the month.

4. How do I book the course?

To book the course you can go to https://www.relate-software.com/drive-online-booking/ and use the booking calendar to select your dates and book and pay for the course or you can call us on   01 -4597800 or else email training@relate-software.com.

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

No, all required course materials are included in the course fee, you receive a PDF copy of the training manual to download before the course starts.

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 01 4597800 or by sending us an email to training@relate-software.com.

7. Where is the course held?

All courses are now being ran online using Go-To Training. This site gives our customers easy access to our training courses. Once you are booked onto the training you will receive an email from training@relate-software.com the night before the course with a registration link to access the training, just click on the link you receive, register your details and you're ready to join the training.