



Premier Services Xpert Training Library

Xpert Trainings

Xpert Trainings are offered virtually to your team as part of your PremierX engagement. Trainings can be conducted for CRM Administrators, Power Users, or End Users. Your institution is allowed up to 1 training per month, with at least two weeks' notice for each training session. Trainings are typically 1 - 1.5 hours, and a recording of the session will be available.

Training agendas can range from specific products or discussions around best practices and optimizing the use of your CRM. As part of the training prep, your Premier Specialist will collaborate with you to determine specific use cases that you may have or specific topics you'd like covered.

Below a list of training topics to choose from.

TargetX Foundations

- Communication Planner
- Legacy Email Tools
- Advanced Legacy Email Review: Drip Campaigns, EBM Data, and Reporting
- Events
- Advanced Events Review: Invite Only Events, Sub Events, Locations, and Travel Planner
- Engage
- Portal
- Prospect Scoring
- Retention
- Surveys
- Telemarketing
- TX Forms
- TX Print
- TX SMS

Salesforce Foundations

- Salesforce Basics and CRM Overview
- Reports and Dashboards
- Advanced Reporting: Cross Filters, Joined Reports, and Buckets
- Duplicate Management Using Salesforce Native Tools
- Salesforce DataLoader
- Salesforce Security and Access Overview

System Maintenance

- Application Requirements Manager: Checklist Generation
- Application Review Tool
- Appointment Scheduler
- Decision Letters
- Faculty Early Alerts
- Group Assignments
- Online Application Maintenance
- Payment Connector
- Reviewing and Troubleshooting Errors
- Source to Master/Profile Builder
- UChat