

## Insightly for End Users

### Course Specifications

**Course Number:** ELK91–610\_rev2.1

**Course Length:** 1.0 day(s)

### Course Description

Strong relationships with customers are one of the keys to a successful business. More and more companies are using software tools that help them initiate, track, and improve customer relationships. A number of vendors offer web-based applications specifically designed for this purpose. However, these services tend to be geared for larger businesses—making them too expensive or too complicated for smaller companies to adopt. Insightly is designed to meet the needs of small business owners and their employees—offering a powerful, scalable solution that is affordable and easy to use.

**Target Student:** The target students for this course are end users of the Insightly platform. Some examples of end users include employees of small businesses and staff of nonprofit organizations, in job roles such as product sales and donation solicitation, who use Insightly to perform tasks such as maintaining customer information, developing opportunities, and managing projects. Students may have a range of computer skills from novice to expert.

**Prerequisites:** To ensure your success in this course, you should have basic end-user skills with computers and the Internet, and some experience using cloud-based applications.

You can obtain this level of skills and knowledge by taking the following Logical Operations courses:

- Using Microsoft® Windows® 8 or Microsoft® Windows® 8 Transition from Windows® 7
- Microsoft® Office 365™: Web Apps for End Users or Microsoft® Office 365™: Web Apps and Collaboration for Office 2013

### Hardware Requirements

For this course, you will need one computer for each student and one for the instructor. Each computer will need the following minimum hardware configurations:

- 1 GHz or faster 32-bit (x86) or 64-bit (x64)
- 1 gigabyte (GB) RAM (32-bit) or 2 GB RAM (64-bit)
- 16 GB available hard disk space (32-bit) or 20 GB (64-bit)
- CD-ROM drive
- Keyboard and mouse (or other pointing device)
- 1,024 × 768 resolution monitor recommended
- Network cards and cabling for local network access
- Internet access (contact your local network administrator)
- Projection system to display the instructor's computer screen

## Software Requirements

The following software must be installed on each instructor and student computer:

- Microsoft® Windows® 7, 8, or 8.1
- The latest version of Google Chrome™
- The latest version of Adobe® Reader®

Insightly is "software as a service" that runs on all major web browsers. However, because Insightly is designed to integrate with a number of Google services, the majority of Insightly customers use Chrome as their browser of choice.

## Course Content

### Lesson 1: Signing Up and Logging In to Insightly

- Topic A: Create an Insightly Account
- Topic B: Access Insightly on Different Platforms
- Topic C: Navigate the Insightly Web Interface
- Topic D: Change Your User Settings

### Lesson 2: Creating and Managing Organizations

- Topic A: Add Organizations
- Topic B: Act on Organizations

### Lesson 3: Creating and Managing Contacts

- Topic A: Add Contacts
- Topic B: Act on Contacts

### Lesson 4: Creating and Managing Opportunities

- Topic A: Add Opportunities
- Topic B: Act on Opportunities

### Lesson 5: Working with Tasks and Projects

- Topic A: Manage Tasks
- Topic B: Manage Projects

### Lesson 6: Managing Emails and Generating Reports

- Topic A: Manage Emails
- Topic B: Generate Reports

### Lesson 7: Managing Events and Notifications

- Topic A: Manage Events
- Topic B: View and Change Notifications

### Appendix A: Changing System Settings