

CONTENT MANAGER EMAIL CAPTURE AND MANAGEMENT MASTERCLASS



Platform

Content Manager Desktop or Context Client

Course Duration

1 ½ hours

Delivery Mode

Remote training session via Microsoft Teams

Training is delivered within your environment to contextualise the training to your setup and build version

The training session will be recorded and provided upon conclusion of training for your reference

Pre-requisites

Good understanding of Microsoft Office applications

Audience

Suitable for all staff with a Content Manager license

This training course allows you to have up to a maximum of 10 trainees to attend

Overview

This training course provides attendees with advanced skills for email capture and management using Content Manager's native integration with Outlook.

Attendees will consolidate their skills for capturing and managing emails, working with attachments and creating and working with Check In Styles and Outlook linked folders.

Topics

This training course will cover the following:

- ▶ Saving Emails
- ▶ Saving Attachments
- ▶ Saving and Sending Emails
- ▶ Replying to Emails
- ▶ Sending Records from Content Manager
- ▶ Creating Check In Styles
- ▶ Removing Check In Styles
- ▶ Creating Outlook linked folders
- ▶ Removing Outlook linked folders

Please note that the provision of training materials or digital handouts are not included within training due to the development of generic training materials can not be achieved for a system that can be configured and used in multiple ways. Quotes for custom training materials can be provided upon request.

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