Many users want to learn the basics, then ramp it up as they become more comfortable with their tools. We've found that this order is the most frequently followed by users moving from Redtail rookies to experts!

1 **Getting Started Playlist:** Get started learning about the newest evolution of Redtail CRM with the resources listed in our Live in 5 Playlist.

2 **Recorded Webinars:** The backbone of our training, every webinar we run is recorded and posted for quick viewing at your own convenience.

Beginner: You're just getting started with Redtail; here are some of the most important areas to focus on as you're adjusting to your new (or even first!) CRM tool.

1. Users & Teams: Redtail can have up to 15 users per database! Learn all about creating and managing them.
   a. Various Database Roles
   b. Users & Teams on HelpDesk

2. **Preferences:** Each user has their own Redtail preferences to make the CRM their own.
   a. Preferences on HelpDesk

3. Manage Your Account: The place where you set up your CRM customizations, Integrations and more.
   a. Manage Your Account on HelpDesk

4. Contacts: The names in your database. Get acclimated to the Contact Record and some best practices.
   a. Contact Management on HelpDesk

5. Notes: The cornerstone of your business, Notes help you track all your client touches throughout history.
   a. Notes on HelpDesk

6. Calendar: CRM does more than just track contacts—it helps you manage your entire schedule!
   a. Calendar on HelpDesk

Intermediate: Now that you're humming along with the basics of your CRM, it's time to take it to the next level. A really great rolodex is nice, but the point of a CRM is to help you mine your data and use it for lists and marketing.

1. Searching & Lists: Looking for your contacts and grouping them together.
   a. Searching & Lists on HelpDesk

2. Reporting: Mining contacts based on useful data points.
   a. Breakdown of Reports
   b. Reporting on HelpDesk

3. Mail Merge: Draft Word documents to pull Redtail data for bulk customization to your clients.
   a. Mail Merge on HelpDesk

Advanced: You've plateaued in your CRM usages, and you want to know the intricate tools built to help not only with marketing, but to fully automate your office processes so that nothing falls through the cracks.

1. Workflows: Automated task management process built by users to make sure nothing falls through the cracks.
   a. Running Workflows on HelpDesk
   b. The Wonderful World of Workflows

2. Automations: Automations are triggers built in Redtail to fulfill multiple "if this, then that" scenarios for your office.
   a. Automations on HelpDesk

3. Seminars: Track your events! Be it workshops or client appreciation events, manage them here and track attendees!
   a. Seminars on HelpDesk

4. Opportunities: A big picture overview of your sales pipeline. Track your wins, losses and revenue!
   a. Opportunities on HelpDesk

③ **Support Resources:**

Training Info

1. Recorded Webinars: The backbone of our training, every Continuing Education webinar we run is recorded and posted for quick viewing at your own convenience.

2. Training@redtailtechnology.com

Support Info

1. Resources Video: You're never alone! Reach out to Redtail in a variety of ways to get your questions answered!

2. Support@redtailtechnology.com

3. Submit a Help Ticket: Quickly and easily get a question to our Support team and get a fast response!

4. 800.206.5030 option 3

④ **Live Webinar Schedule Link:** Redtail always offers live webinars to keep you updated on the new tools and teach you about some old ones you might not be aware of!

If you have any questions, please don't hesitate to call us at 800.206.5030 option 2 for Sales 800.206.5030 option 3 for Support.

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