Many users look for concentrated training based on what their goals are. Below are some frequently requested Topics and the applicable tools and training that will help you out!

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.

Marketing: Searching for and grouping your clients, reporting on their activities, notes or other fields, and utilizing Marketing tools in Redtail for reaching out.

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

4. Broadcast Email: Quickly, easily draft and send a personalized, customized email to multiple clients.
   a. Broadcast Email Overview on HelpDesk

Process Management: Building and understanding your activities, action items, and processes within your Redtail CRM.

1. Calendar: Understanding your calendar, activities and how to use them is one of the most important parts of making your CRM work for you.
   a. Helpdesk Documentation

2. Wonderful World of Workflows: Workflows in Redtail are a Process Management tool designed to help you step by step through your process without anything falling through the cracks.

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

Reporting & Custom Exporting: Mining data is paramount to owning and utilizing a CRM. Understand what reports and data you can pull, as well as the customization available to you. See what you want, when you want, how you want.

1. Reporting Breakdown

2. Reporting Video: Mining contacts based on useful data points.

3. Custom Exporting Documentation: Custom Exporting allows you to build and run custom spreadsheets with that data you want to see.

(continued on reverse…)

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.