

## LassoU - Lasso Administration Outline

The objective of this course is to familiarize participants with Lasso Set-up procedures and to introduce new Lasso users to the Lasso Administration Center.

Upon completion of this course, participants will be able to:

- Import Realtors, Registrants and Inventory into Lasso
- Personalize dropdown menus and ratings
- Manage the Question Center and assign Questions to specific projects
- Create Sales Processes, Report Groups, Manage Duplicates
- Manage Users and assign Permissions

Pre-requisite: None required

Audience: Top-level Users  
 Those responsible for managing Users and Questions  
 Those responsible for adding new projects & importing data  
 Those responsible for customizing Lasso features across all projects

Course Length: Up to 2 1/2 hours (as required)

Section	Duration	Topic
1	5 minutes	Lasso Administration Center Overview
2	5 minutes	Lasso Administration Center Home Page
3	5 minutes	Update Corporate Branch/Sales Center contact information
4	20 minutes	Customize client preferences across all projects, e.g. Ratings Edit projects
5	10 minutes	Create and Assign Terminology Maps
6	20 minutes	Create Sales Processes, Manage Registrant Duplicates
7	20 minutes	Manage Questions and Answers
8	20 minutes	Add & Delete users Assign Permissions, create custom Permission Pre-sets
9	30 minutes	Import Outside Realtors, Registrants and Inventory
10	10 minutes	Create Report Groups View consolidated reporting