

LassoU – Marketing Sales Center Outline

The objective of this course is to introduce new Lasso users to the Lasso Marketing Sales Center. Upon completion of this course, participants will have an understanding of the Sales Center Home Page elements, be able to create new Registrant profiles, manage daily Registrant communication via email, log Registrant activities such as phone calls and visits, create and manage Custom Lists and Groups, and access various standard reports.

Participants will also receive an overview of the Communication Center which includes: Email, Calendar, and Contacts.

Pre-requisite: None required

Audience: Sales team from sales center and/or head office
Those responsible for day-to-day Registrant contact & management
Those responsible for email campaigns
Lasso Administrators and Project Administrators

Course Length: Up to 3 hours (as required)

Section	Duration	Topic
1	5 minutes	Lasso Introduction & login Accessing a project
2	5 minutes	Sales Center Home Page (overview)
3	45 minutes	Registrant Search Function Add and Manage Registrant functions Manage registrant contact & communications
4	20 minutes	Create and use Custom Lists & Groups
5	30 minutes	Manage Duplicates > Sales Rep level Inventory > Graphical & Textual Availability Board Email Templates > Basic Editor Manage assigned activities
6	10 minutes	Reporting
	10 minutes	BREAK
7	10 minutes	Appointments & tasks
8	20 minutes	Communication Center <ul style="list-style-type: none"> • Create email, manage folders, signatures, filters • Manage calendar events • Manage contacts
9	20 minutes	Sales Manager screen & related functionality Questions and answers