

# Beyond University for Sales

Last Modified on 12/22/2021 2:53 pm CST

## Welcome Sales Reps & AMs!

We've curated the most important information for sales reps and account managers and packed that information into the following short courses. This way you can learn bit by bit. We recommend taking the following courses in order. Each course will have a short summary of what information is included.

If you sign up for a free account (which can be done on any course below), you can track your progress through each course.

### Introduction to Beyond

This course includes information on how to log in, navigate, and understand some Beyond basics.

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### Customer & Contact Record Basics

In this course we will explore how to create and manage customer and contact records to track important sales information and processes.

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### Additional Customer Options

Now that you've learned how to create records, let's take some time to focus on the details. In this course, we'll walk through creating departments, saving documents, deactivating records, and sales specific searching.

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### **Order Basics** *(Optional)*

When a customer contact calls needing employees, do you take down their order information? If so, this course will help you learn more about how to optimize your customer records for order creation and how to create an order record in Beyond.

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