CRM Training Agenda

NASC Getting to know ReadyMembership
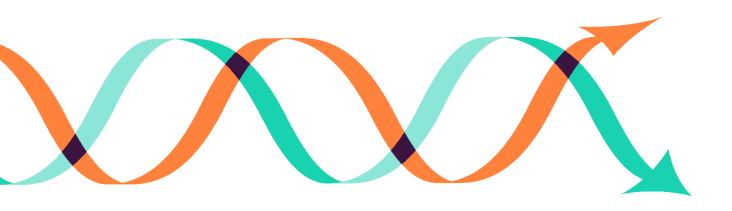
National Access & Scaffolding Confederation (NASC)
Membership Software
Version 1.0
30 September 2025 / 1 October 2025

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Training agenda

Area	Covered
Contacts	What a Contact is Search Filter Contact table view Impersonation
Add contact	Basic contact Organisation Extended personal info Contact Preferences Address Social
View contact	Contact details Latest activity Planned activity Notes Impersonation Send email Edit details Dashboard Personal info Subscriptions? Relationships Orders Event bookings
Subscriptions	Plans and prices (How to set up, edit, enable) Edit dates Certificates Switch plan Switch grades Cancel subscription
Export	Exporting contact Scheduling
Edit details	Merge Set password Senda welcome email
Basic filtering	Filter library Indentation Filter folders

Area	Covered
Lookups & more	Tags Activity Notes Topics Relationship types
Tools and settings	Multifactor login Merging duplicates

Action items

Think of reports and filters you will need & use regularly– What data would you need to see, how often

Send the list to CSM to add to the Readiness Session agendas

Related Videos & User Guides

Access to Videos & User Guides on the Knowledge Hub will require you to be logged in on your ReadyMembership platform first.

Walkthrough videos

1. Introduction to CRM
2. CRM Additional features
3. Introduction to the Rules Engine
4. Advanced features of the Rules Engine

User Guides

Membership & Subscriptions

Contacts & Organisations

Notes

[insert]