After completing the **Companies & Contacts** course, we recommend that you complete this hands-on practice to solidify your learning.

Hands-On Practice

- Add a new Company and Do the Following:
 - Choose a Home Office
 - Add 3 Company Categories
 - Add a Company Tag
 - Add Workers Comp Codes
- Add a new Contact and Do the Following:
 - o Add a Title
 - Add a Division
 - Select Contact Source
 - Add a Headline
- Add an Opportunity and Do the Following:
 - o Add an Owner
 - Add Opportunity Details
 - Create a Job off of an Opportunity

Next Steps

- Use the Avi Guides in Platform
- Access the Avionté Support Center
 - o <u>support.avionte.com</u>
- Standard Reporting: How-To and a List of Standard Reports
- Opportunities
- Set up the Echo Chrome Extension
- Continue to Practice in the Platform

Future Trainings

- If you would like to take another course, see our Avionté Client Training Calendar to register for another course
 - o Avionté Client Training Calendar

