

# Kantata Training

Hours	Topic To Be Covered
<b>Understanding Kantata - 4 hours - 5 hours</b>	Overview of Kantata: What it is and its features. Benefits of using Kantata for clients. Introduction to the Kantata interface.
<b>Account Setup and Navigation - 4 hours</b>	Creating a new account on Kantata. Setting up user profiles and permissions. Navigating through different sections and modules.
<b>Basic Data Entry - 4 hours</b>	Learning how to enter and edit client information. Adding contacts and organizations.
<b>Client Profiles - 4 hours</b>	Understanding client profiles in Kantata. Adding and editing client details. Managing client documents and attachments.
<b>Case Management - 4 hours</b>	Creating and managing cases for clients. Tracking case progress and updates. Assigning tasks and deadlines.
<b>Communication Tools - 2 hours</b>	Utilizing communication tools within Kantata (messaging, notifications, etc.). Managing client communication effectively.
<b>Report Generation - 8 hours</b>	Understanding the reporting capabilities of Kantata. Generating standard reports for clients. Customizing reports based on client needs.
<b>Data Analysis - 4 hours</b>	Analyzing client data using Kantata's analytics tools. Identifying trends and patterns in client information. Utilizing data insights for decision-making.
<b>Troubleshooting and Support - 1 hour</b>	Addressing common issues.
<b>Integrations and Extensions - 4 hours</b>	Exploring integrations with other tools and software. Understanding how to extend Kantata's functionality.
<b>Workflow Optimization - 2 hours</b>	Streamlining workflows and processes within Kantata. Implementing best practices for efficient client management.
<b>Advanced Training Modules - Optional - 4 hours</b>	Optional advanced training sessions based on specific client needs or industry requirements. Q&A sessions for clarifications and deep dives into advanced features.
<b>Review and Assessment -2 hours</b>	Reviewing key concepts and features covered throughout the training. Assessing trainees' understanding through quizzes or practical exercises. Providing feedback and suggestions for improvement.