

How a TMS Can Benefit Every Team in Your Business

Use Administrate to Help Every Team in Your Business!

If you're looking for a way to make sure your training operation runs smoother, a TMS (Training Management System) could be the answer to your problems. Training Management Systems, like Administrate, are designed to manage your entire training operation for you, so your staff don't have to deal with as much administration, repetitive tasks, and duplicate data entry.

If you're considering a TMS for your business, you may think that only a few people in your people will actually get any use out of the system, but we're here to show you that your entire business can use a TMS in a useful way!

In this eBook we've picked the most common teams of staff we think will be present in a training company, and highlighted all the different ways they can use Administrate to improve their output as a department, and help your entire business run more effectively!

Training Administration Team

First up let's tackle the team that are probably going to get the most benefit from a Training Management System – your Training Administration team.

Quickly Schedule Your Courses



If you run a lot of courses, chances are a lot of your Training Administration team's time is spent [scheduling those courses](#) so you can sell them online, and so you can keep track of when and where a course is happening, as well as which tutors and resources will be attached to the class.

If you're running several instances of the same course, that's going to mean a lot of copying and pasting to schedule each course individually. Details such as the date and the tutor may change, but things like the course description, the length of classes, the amount of classes in a course, and the assessment method are going to remain the same, and that is going to get very boring very quickly!

Administrate allows you to schedule courses in just a few clicks, saving your team lots of time and effort, so they can get on with more important tasks. With Administrate, you can create course templates, meaning you template most of the details of a course you are scheduling, and you can then copy and use this template across all the instances of that course you need to schedule. Now the only

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information you need to go in and edit is the changeable points – everything else will stay the same and be pre-populated for you. Not only will this make this job far less dull, it also cuts down the chance of human error, and the wrong details being copied and pasted into the wrong box then published on your website!

Assign the Right Tutors



Aside from doing the repetitive side of course set-up, there's also the scheduling side, where you need to make sure you're assigning the right [tutors](#) for the job.

Administrate helps you do this in a number of ways:

- You can set the relevant qualifications that each members of staff holds when you enter them into the system. That way if a certain class can only be taught by people who hold that qualification, you can make sure you filter your tutors correctly, and only assign the best people for the job.
- You can track when tutors are on holiday, so you'll never assign a member of staff to something and then have them not turn up because they are actually out of the office.
- When tutors are on holiday, or already assigned to a conflicting course, Administrate will make it impossible for you to select them for another class by removing them from the available tutors list when you are scheduling your courses. This means you will never be able to double book your staff!

Manage Your Resources



As with your tutors, it's important to make sure the correct [resources](#) are assigned to each of your courses. This can cover things like classrooms, teaching materials, specialist equipment such as vehicles, projectors, computers, etc. Basically, anything you need to make sure your course runs successfully.

First of all, you can record all your resources within Administrate, to make sure you have a complete record of every resource you have as a business. Administrate allows you to sort your resources exactly how you want them, with the use of custom fields meaning you can get as detailed as you want to. This can be handy if you want to do things like record the serial numbers of all your laptops, or the registration numbers of your vehicles, so you always know exactly which one you are booking for a course.

You can also set the location of each of your classrooms and resources to make sure they are always assigned to the correct location, and are never accidentally assigned to somewhere they cannot actually be used.

Additionally, you can include information like whether something is out of service, or how many copies of a certain book you own, so the person scheduling the courses always has the full picture, even if they are based in a different location to the resources themselves.

Then, when you schedule your courses, you can pick the exact

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resources you need, and be confident that everything assigned to
that course will be present, and be in working order!

Gather Feedback Easily



One hugely invaluable task whenever you run a training course is to get feedback from your students. However, we do appreciate that this can be a hugely time intensive activity.

Administrate is designed to make sure you can gather all the vital feedback that you need in order to [measure your training effectively](#), without you having to spend hours on both collecting and analysing the data!

First of all, our fantastic [SurveyMonkey integration](#) means you can send your SurveyMonkey surveys directly from Administrate. Not only does this allow you to use the contact data you already have for particular classes, but it also means all the responses can be pulled back into Administrate.

This means less work for you when collecting the data, as Administrate does it all for you, and all the information can be pulled directly into our reporting system so you can analyse it however you want to.

Automate Your Communications



Your Training Administration team probably spends a huge amount of time just sending emails to your students. Most of the emails will contain the same sorts of basic information, such as sales confirmation, class instructions, or survey requests, but obviously specific details such as contact details and class details will need to be changed every time.

This means a lot of copying and pasting, gathering all the details you need to input into the emails, and double checking the details are correct for each email, which means the time you spend on each email can really start to add up!

Administrate allows you to set up templates for all the emails that you need to send, and then it will pull through all the specific details from the system, such as student's name, email address, the course they have purchased, and the specific dates of the course. This means you can be confident all your emails will always go out with all the correct details in them, without you having to spend time double checking them.

You can then set the trigger events which will tell the email it's time to send. These can be things like a certain date or a customer completing a sale, and will cause the [email to send automatically](#). This essentially means that once all your templates and triggers are set up once, you really don't have to worry about the email side of

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things again unless you need to add a new email template into the mix.

Assign Tasks to the Right People



If you work in a large team, split over different offices or different locations, it can be hard to split up the work that needs to be done to people other than yourself. You can spend a lot of time just dishing the work out, and emailing people what they need to do, which can really eat into your productivity.

Using Administrate to assign tasks to people is a much quicker way of working, ensuring everyone knows exactly what they are doing without you wasting too much time on the process.

When you create an event you can assign tasks to that event (which you can also template using [task workflows](#), so the same tasks can be copied across multiple events with just a few clicks) and then assign a person to be responsible for that task. You can also make sure that people are emailed whenever they are assigned to a task, so they know exactly what work they have to do.

All the tasks for each event will be displayed on the event screen, on everyone's homepage so they can see their own personalised list of tasks, and will be emailed to them every morning as part of their task list, so it's really easy to keep track of what still needs done and who is responsible for it!

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Creating Learning Tracks



Sometimes it can be hard to clearly plan out the different training that you offer and how it all connects to one another. This can be all the different pieces of work a student has to do to gain a qualification, or all the different courses a student has to complete to add up to a larger qualification. It's important your students have full visibility on what is expected of them, and that you have visibility to how your students are progressing, and what work still needs to be done.

That's where [learning tracks](#) come in! Learning tracks allow you to create personalised learning plans for your students depending on what learning outcomes they want to achieve. You can plan out exactly what training they need to complete, and in what order, to make sure they get the training result they want.

Sales Team

Sell Your Courses Online



One huge benefit of Administrate is how easy it makes [selling your courses online](#)! Making the move to online sales can seem like a lot of work, or quite a scary move to make, but we're here to show you that it's really easy and will do wonders for your course sales!

If you want to sell your courses online, once you've integrated Administrate with your website, all the information you've already entered into Administrate will simply be pulled through automatically and displayed on your website. This means that you don't have to worry about re-entering all the same data again on your website, as the information will be pulled through in an instant. This also means that any changes you make will be automatically updated, so you don't need to worry about updating the same information in multiple places, or displaying incorrect data.

So why is this good for your Sales team? Well first off, making the move will not only mean that they don't need to do any additional work with duplicate data entry, it will actually save them time as well. If you are selling your courses online, it will mean that you don't need to process all your sales either over the phone or via email, which can be quite time consuming for your Sales team. They will now have a lot more free time, and you're actually leaving yourself

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open to a lot more sales, as customers won't be put off with busy telephone lines or having to wait till someone is in the office to get a reply from an email.

Secondly, your Sales team will no longer have to worry about keeping track of all your customer details, or tracking when a sale is made, as Administrate will do that all for you. When a customer buys from you, all the information they enter will be pulled into Administrate and stored as a contact. This makes it so easy to see things like which students are attending which class, as well as check any contact details of any of your students in just a few seconds.

Having all this free time means your Sales team will have time for other tasks, but will also be able to be available to any customers who prefer to buy over the phone, or who are simply calling up with an enquiry, as there will be less chance of the phone lines being jammed if there are other routes for customers to make a purchase with you.

Use Our Message Centre

As we've just mentioned above, customers or potential customers may choose to get in contact with you simply to ask a question rather than actually buy something from you, and it's important that your Sales team are able to deal with this effectively.

What system are you using just now? Chances are it's a shared inbox, probably to an info@ or enquiries@ email address, which the whole team will have access to. But this can get confusing quickly! Unless you remember to reply all, it can be hard to keep track of which emails have been replied to and which haven't, which can lead to customers getting multiple replies, or not getting an answer at all, which is hardly ideal.

One answer to make the whole process run smoother is to use a [message centre](#), which is part of Administrate's software. This can make the whole experience much easier for a number of reasons:

Messages can be assigned to staff members, so it's always really clear which messages are being dealt with and which still need some attention.

You can convert the people who contact you into active sales opportunities if you need to, meaning your sales system is automatically updated, and you don't need to worry about losing any details or forgetting to pass on the details to the relevant person – it's all done for you.

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Easier for other team members to cover if someone is off ill or on holiday, as they can simply log in to Administrate, rather than having to worry about getting access to the email account.

Keep Important Contacts up to Date



Making sure all your leads and customer contacts are up-to-date is an essential task for your Sales team, as you need to make sure you can get in touch with someone when you need to, and those contact details need to be correct!

You also need a centralised system to keep everything in one place, otherwise staff members could be working from their own lists, which could be out of date or incorrect. It's important that if an update is made, such as a contact changing email address or switching company, that it is updated somewhere where everyone can see it instantly, rather than having to spend lots of time making sure everyone has the new details.

This is where [Administrate's CRM](#) comes in. You can simply upload all your contacts' details into the system and it will be accessible by everyone in the team – though you can set up permissions if not everyone in your company needs to see your contacts' personal details.

Using Administrate's CRM to hold all your contact details will not only mean all your details are secure and easy to access, but it also means they can be pulled into any other part of the Administrate

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system you need them to be, which cuts down on duplicate data entry and saves you lots of time.

Finally, you can set up custom fields in Administrate, to make sure you're capturing exactly the data about your contacts that you need to be, not just the pre-filled data that another training management system may think you need!

Manage Those Deals

If you're running a busy Sales team, then chances are you have lots of deals on the go, which are all at different stages, and are all managed by different people. While all the individual salespeople should have a clear idea of which deals are at what stage, it can be hard to get an overview of the entire department in a glance. This means management maybe don't get the overview they need, but it also makes things hard if people need cover when they are off on holiday or off sick.

Administrate's [sales system](#) allows you to customise your sales workflow, so you can set it up to have all the steps you need, as well as being able to decide how much data you require at each step, so your pipeline can be completely customised to suit the way your business, and your Sales team, works!

It also means it's really quick and easy to get an overview of how a deal is progressing, as you can simply click on the deal and see how far along the sales pipeline they are, and what the next actions need to be in order to hopefully move them closer to that sale.

Our sales system also displays all the key data you need to see for a quick overview of how the Sales department is performing, so you don't have to spend time scrolling and trying to find the right data. You can see all your open opportunities, closed opportunities, the projected value, projected wins, how long your sales cycle is, and what your conversion rate is. As with all the information in Administrate, this will all be updated in real-time, so you can always get an exact picture of how your company is performing right now.

Sell Training Tokens



Locking in repeat business and bulk deals can be a great boost for your Sales team and your business, and Administrate's [training tokens](#) are a brilliant way to tackle this problem. Training tokens are pre-defined vouchers which you can sell to customers in blocks, which they can redeem for training at a later date – just like a gift voucher!

These are really handy if you're selling training to a company who knows they want a certain amount of places on your training, but don't want to book on to the training right now. This could be because they know they need their entire workforce to attend a certain kind of training over the course of a year but that is going to be challenging to schedule, and ideally they don't want everyone to be out of the office at the same time. Training tokens allow them to know they have the training purchased, and for you to lock in a huge amount of business, and then they can worry about the specifics later.

This is great for your Sales team, because it means they can close those deals faster without having to do all the scheduling and organising in order to close the sale, and then the rest of the booking process can be dealt with by your Training Administration team instead, leaving the Sales team more time to make even more sales.

Selling training in this way should also ensure that customers will

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return to you time and time again, as the process is a lot easier for them, and you can even offer customers a discount if they chose to buy in this way to encourage them to place those larger orders, and keep coming back.

Marketing Team

Collect Those Leads

Having customers email you directly is not the only way collect leads – you can also use [landing forms on your website](#), where people can either get in touch with more questions, or fill them out in order to receive a specific piece of marketing content.

This can be a great way to provide a little something extra to your potential customers, such as eBooks, whitepapers, PDFs, or videos, which you can then give them access to or email to them, while at the same time allow you to build a marketing list of people who are interested in your business and having opted in to receiving further marketing materials from you. This means you will then be able to send them things like email newsletters, announcements, and information specific to the types of courses they are interested in.

All the information pulled in from landing forms will be displayed in the message centre, so you can always deal with the enquiry as accurately as possible.

Market with MailChimp



Administrate integrates with lots of other great products, but one which will definitely interest the Marketing team is our [MailChimp integration](#). As we mentioned above, sending marketing emails

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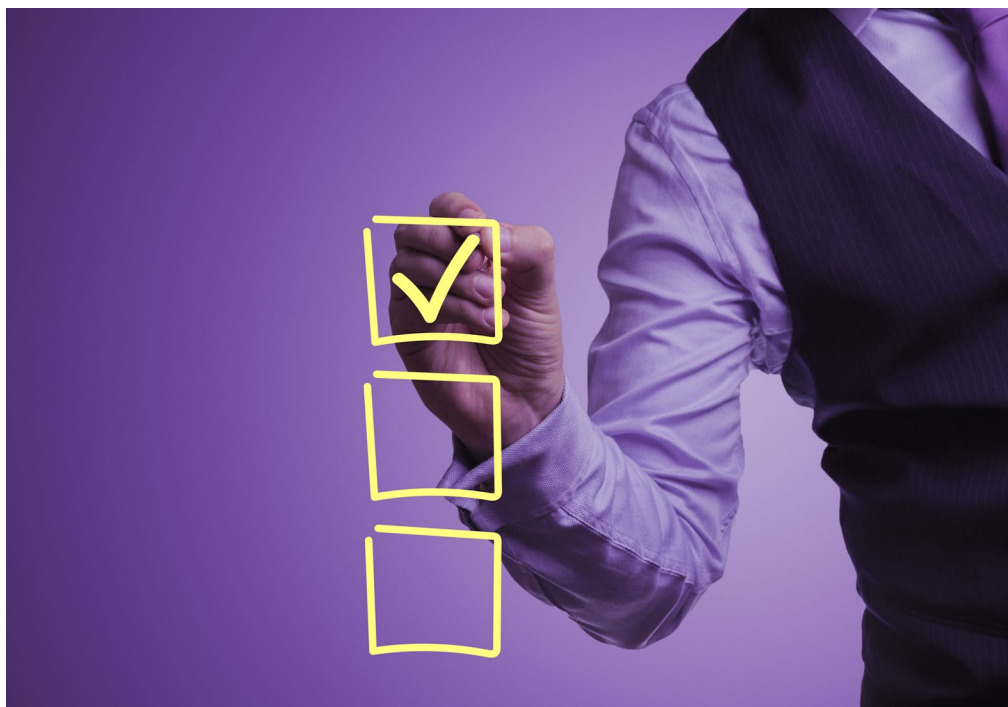
and newsletters to customers and potential customers is a great marketing tool, but those emails have to look good to get results, and that's where MailChimp comes in.

Using the MailChimp integration you can send emails to the marketing lists you have built in Administrate using MailChimp's amazing email builder, themes, and all their other tools which enable you to create the coolest email content out there. Simply export your contacts from Administrate to MailChimp in just a few clicks, rather than having to worry about maintaining multiple contact lists in different systems.

Not only that, but you can also track all the vital data, such as bounces, opens, and clicks, which are pulled directly back into Administrate so you can analyse them along with all the other data you have in Administrate's reporting system.

Tutors

Track Student Attendance



One really important administrative tasks that only your tutor can complete is [tracking class attendance](#). This is really important so you can track how many students are attending your classes, and whether people are dropping off as the term goes on, or whether people are attending the minimum amount of classes they need to in order to successfully pass a class.

However, it can be a task that is easily forgotten if your tutors have lots of other things to get on with it. It can mean printing off class lists, filling them out, keeping them safe, and then passing the information on to a team like your Training Administration team after class, who can then record the information in a central place. So not only is this duplicate data entry, as two people are having to mark the attendance in separate ways, it also relies on your tutors remembering to collect attendance lists at the end of class (which could include multiple list throughout the day, depending on how many classes they teach), and then sending the information over to your Training Administration team.

Using Administrate to track student attendance makes the whole process much easier. Tutors simply need to enter the information on the event page for the event they are teaching, and the attendance

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can be input directly in just a few clicks. They don't even have to worry about printing off a student list, as all the information about the students who are currently signed up to each class will automatically be pulled through to the attendance section.

Storing all the information centrally like this also means that anyone who needs to access it can do in an instant, instead of it having to send it to multiple people. Information can also be edited really easily, and it will be updated in real-time for anyone viewing the information, so you can be confident you're always looking at the most current version of the data.

Administrate will also automatically calculate the attendance percentage for each student, so it's really easy to see who is under-attending, meaning you can address the problem before a student ends up missing too many classes to complete their training properly.

Communicate with Your Class



As well as all the administration emails your students receive, they will most likely receive a lot of communications directly from your tutors as well. This could be sending out notes or reading materials after a class, asking them to bring a specific book to the next class, or telling them which groups they are assigned to for a group project.

It's important that this is as easy for your tutors to do as possible, as you don't want them to spend too much time on administration tasks as opposed to teaching.

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The main thing is to make sure your tutors are always emailing the correct list of students. This means not only making sure that no students are missed out, but also that any students that have perhaps left the course are not longer emailed either. That's where Administrate comes in!

On each event page there is a handy option to [email](#) all the students for that class. This list will always be the most up-to-date list, so you can be confident that all the relevant people will receive the email. You can also choose to email all inactive students or all cancelled students instead if you need to though, as you may have an important communication for them as well that current students don't need to see. You can even choose to see all the students on the current list you are emailing, and simply uncheck those that you don't need to include, if you only need to email select people in the class.

When it comes to sending the actual email, you can choose an email from the list of templates you already have in Administrate, or simply write your own email in the box, and you even have the option to add attachments.

This means your tutors can quickly and easily send emails from directly within Administrate, without having to worry about getting the recipient list correct, or lots of copying and pasting if they are sending lots of emails.

Plan Your Time



Trying to keep yourself organised when you have lots of different classes to run can be challenging! Not only do you have to attend all the different classes you are teaching, but you also need to prep for those classes, create assessments, mark those assessments, make time for those administration tasks that need done, etc. It can all quickly add up! So what's the best way to keep track of everything you need to do? Well Administrate can help you stay organised in a couple of different ways:

- Use the calendar view to see all the classes you have upcoming. That way you can see when you have a bit of free time, or even free whole days to get other work done in.
- In each event screen you can add tasks which are specific to that event. You can add dates which these need to be done by, so it's really easy to spread all the tasks you need to do so you're not overloading yourself, but you still ensure that everything gets done.
- You can also use [task workflows](#), if you tend to complete the same set of standard tasks for each class you teach. That means your task list will be copied to an event in seconds, and you won't have to enter the same data multiple times.
- Once you've assigned tasks to yourself you can view them on the task list on the event screen for each class, or you can see them on your homepage in the My Tasks section, so you're always aware of what is coming up. Clicking on the Full Task List button also allows you to see every single task that you currently have

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assigned to you.

- Administrate sends you a daily task list email every morning, so you are always aware of what needs done that day. It's a ready-made to-do list straight to your inbox!

Issue Certificates Directly



Just because a class is over, doesn't mean your work is done! Once students have completed their training with you, it can mean lots of certificates which need to be sent out. And obviously, it's so important that all the information included in these certificates is correct, and sent to the right person. It's a lot of work, but it's essential so your students have proof of their final grade.

In each event screen, on the Students page you can simply click on Tools and then Certificates to get your certificates set up for all the students. The next page will automatically populate an entire list of all the students from the class, and you can deselect any which you don't wish to generate a certificate for at this time.

You can then set the certificate to be emailed out to either the students and the instructors registered for that event, or just send them to yourself if you perhaps need a copy of them, or wish to print them out and distribute them in class.

Certificates will then be generated with the correct student information, and the correct course information pulled through automatically, without lots of manual work from you!

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Manage Course Documents Online



If you're running lots of different classes, keeping track of all the different course documents you need can be a pain. Especially when you need to be able to print these off whenever you need them, or send them to students from certain classes.

Administrate's DMS ([Document Management System](#)) can help make this a little bit easier. To begin with, you can upload all of your documents into the DMS, so they are easy to access from Administrate whenever you need them. It also means if anyone else needs to access your documents for any reason, such as another teacher covering for you when you are sick, then they will all be right there, rather than them having to search for them.

Documents can be split into different folders, so you can make sure everything is really organised, and split into different classes, and you can set different levels of permissions if you need some things to only be visible to certain people.

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You can also attach documents from the DMS directly into emails, so when you are communicating with your students, and want to send them something like an essay plan for an upcoming assessment, you can be confident it will be accessible and you can attach it in a couple of clicks. This means you don't always have to be working from your own computer, with all your own files, whenever you are doing course administration, as everything will be centrally stored in Administrate!

Management Team

Get the Reports You Need



One huge benefit of Administrate that your Management team will notice straight away is the ability to pull exactly the [reports](#) they need very quickly and easily!

Your Management team are typically going to need reports on various different parts of the business at any given time, and having to find the right person to contact, and then wait on them to produce the report themselves can mean a lot of wasted time. Ideally, you want your Management team to decide on the reports they need, and then be able to create them themselves, as bringing other people into the process will inevitably just slow it down.

This may not always be possible, as different information from different departments may be stored on a number of different systems, and if you're not directly familiar with the way that department works, then it could mean a lot of wasted time just trying to find what you need, never mind turning it into a usable report!

There's also the fact that your Management team are obviously going to be very busy! Aside from hunting down the information they need, spending lots of time actually creating the reports is also hardly ideal. Add in the fact that those reports may need to be replicated every month, or every quarter, and that's lots of time spent creating

How a TMS Can Benefit Every Team in Your Business reports.

But not to worry, because Administrate can solve all these problems for you! First of all, the main point of Administrate is to have a centralised place to store all your company data, so that it's really easy to access and use across the entire system. This means anything your Management team needs to report on, they will be able to access in an instant, no matter which team the information is from.

This is great for not only giving them an overview of the entire business, but also allowing them to see exactly what they need when they need to see it, without having to go through lots of 'gatekeepers' and spend far more time on the task than they need to.

It also makes it easy to pull data from lots of different departments at once, without having to email several different people, and use up lots of precious time.

When it comes to creating the reports, Administrate can make that a breeze as well! To create the exact report you want, all you need to do is decide on the data you want displayed, and it will pull in any of the information you already had stored in Administrate, and then you just choose how you want to display it. This means you are always creating really customised reports, that show exactly what you want them to, and aren't full of any of any additional data that you don't need to see. We don't believe in making you try and fit your data into any pre-set fields, so everything is fully customisable!

Best of all, once you have created a report, it will stay stored in Administrate, meaning any time you open it or re-send it to people, it will always be updated in real-time, so will always include the most up-to-date information possible. This means that you don't have to recreate the report every time you need it, as Administrate does all the hard work for you.

Finally, reports can be sent to the desired people automatically using our automated communications feature, so you don't even need to worry about sending the reports to other members of the management team manually, as it will all be done for you.

Internal Training Team

Run Staff Training with our LMS



As a training company, your main focus is obviously selling training to your customers, but you also need to focus on the [training you provide to your internal team](#) as well, and you can do that with Administrate!

Our Learning Management System (LMS) allows you to run internal training for your team, and you can set up any courses you create in exactly the same way as you would when creating an external course for your customers.

This allows you to keep track of all the staff who are taking part in each training session by signing them up to classes as if they were customers, so you can see exactly who completed what training and when.

Our LMS also gives you the ability to use content you have made yourself for your eLearning courses, so you can create the exact, personalised learning experience you want for your students, which is great if you need to deliver very specific training related to your business.

Create Personalised Onboarding Plans for New Staff

Bringing new staff into your business can be a stressful time for your internal training team, as they need to make sure everyone is brought up-to-speed with all the training they need to do their role effectively. It can be easy to bombard new members of staff with lots of information and it can be confusing for them to know exactly what training they need to complete and when.

That's where [learning tracks](#) come in, which are basically just personalised learning plans which you can create within Administrate, and can be personalised for every member of staff you have. This can make things very simple, as you can have a default list of all the training new members of staff need to complete as the basis for your learning track, and then can simply add all the training which is specific to their role in afterwards.

This means that both your internal training team and each member of staff can see exactly what training they need to complete, when they need to complete it, and in what order the training needs to be done. It's also a really easy way for both you and the staff members to keep track of what training has actually been completed, and which still needs to be done.

Use Administrate University to Get Staff up to Speed Quickly!

Whether you have a new members of staff starting, or someone who is already in the company who suddenly needs to learn how to use Administrate, we appreciate it can be hard for someone in your business to find the time to talk them through every aspects of the Administrate system. Chances are every user is going to use Administrate slightly differently, and so might require slightly different training anyway. Also, the best way to learn how to use Administrate is really to see someone working through the system, and then being able to have a go yourself, which may not be possible if you're trying to organise large classroom-based sessions.

[Administrate University](#) is Administrate's own training tool, which gives customers an entire overview of every aspect of the system, and through the use of eLearning, shows you exactly how to do everything you need to. We're always updating Administrate University as well, so every time we add a new feature, we aim to have it covered in Administrate University as well.

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This means you can simply give staff members access to Administrate University so they can get up-to-speed on how to use it in their own time as they work through Administrate on their own computer to really get a handle on how to use it.

It also provides a great resource which any member of staff can dip into at any time if they need a refresher on how to do something.

Finance Team

Integrate with Different Accounting Packages



If you're making the move to Administrate, you may worry that it's going to change all your current processes, but it doesn't have to! Administrate integrates with a number of different accounting packages, such as [Xero](#) and [Financial Data Export](#). So if you already have an existing account with any of the accounting packages we integrate with, you can continue to use them after the move to Administrate, and you won't have to worry about learning to use a new system, or moving all your current details over to another system!

The integrations also mean that all the data will be pulled from your accounting package back into Administrate, so you can still use it for all your reporting needs, and everything is still in one place if you need an overview of any aspect of your business!

Offer Lots of Payment Options

As well as integrating with accounting packages, we also offer the choice of lots of different [payment providers](#) for use with Administrate. This means you can offer a number of different payment options to your customers, depending on what you think will work best for them!

Right now our customers can offer payment through Authorize.Net,

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SagePay, WPM Education, Stripe, and PayPal.

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