Account Manager Training Outline

1. **CRM** – Recorded Webinar
   - Overview of building Lists and Dashboards, Home Screen, User Settings, Tasks, Appointments, Issues, and adding Properties and Contacts
2. **Scheduling** – Recorded Webinar
   - Schedule board intro for Contracts and Work Orders.
3. **Time Entry** / Accepting Time – Recorded Webinar
   - Review time entered and inventory allocations from mobile app and how to edit, entering time and material allocations manually, and Accepting time
4. **Crew Mobile** – Recorded Webinar
   - Clocking in/out, adding materials, navigating Crew Mobile
5. **Contract Estimating** - Overview
   - Invoice Types
   - Fixed Payment Schedule Screen
   - As Needed Services
   - T&M Recorded Webinar
6. **Work Order Estimating** - Overview
   - Invoice Types
   - Fixed Price on a Payment Schedule
   - Fixed Price Open Billing
7. **Change Orders/Contract Changes**
   - Changing a Contract
   - Changing a Work Order
8. **Purchasing**
   - Creating new Purchase Receipts, Receiving and Approving Purchase Receipts, how receipts affect work tickets and best practices, Purchasing Assistant, List & Dashboards, Purchasing Assistant clean up.
   - Purchasing 101 - Recorded Webinar
   - Purchasing 201 - Recorded Webinar
9. **Invoicing**
   - Invoice Types and Invoicing Assistant
   - Invoicing 101 - Recorded Webinar

10. **Work Ticket Management** - Recorded Webinar
    - Open tickets through last week, Scheduled tickets through last week, Pending Approval, Completed tickets last week.

11. **Purchase Receipt Management** - Recorded Webinar

- Purchase Receipts in New and Received status

12. **Quick Tickets** - Recorded Webinar
- How to setup and utilize quick tickets for additional work

13. **Sales Best Practices** - Article
- How to create and manage sales goals, pipeline, additional best practices

14. **Sales Scorecards** - Recorded Webinar
- How to create and utilize Sales Scorecards to set and track sales goals.
- Additional Reading - Sales Scorecard Article

15. **Site Audits** - Recorded Webinar
- Overview of how-to setup and use Site Audits

16. **Contract Renewals** - Article
- Overview of the Contract Renewal Report

17. **Electronic Signatures** - Article
- Overview of setup and use of Electronic Signatures