

## Branch Admin Training Outline

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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
  - Additional Reading - [Crew Mobile Getting Started](#)
5. **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](#)
6. **Invoicing**
  - Invoice Types and Invoicing Assistant
  - Invoicing 101 - [Recorded Webinar](#)
  - Invoicing 201 - [Recorded Webinar](#)
7. **Work Ticket Management** - [Recorded Webinar](#)
  - Open tickets through last week, Scheduled tickets through last week, Pending Approval, Completed tickets last week.
8. **Purchase Receipt Management** - [Recorded Webinar](#)
  - Purchase Receipts in New and Received status
9. **Quick Tickets** - [Recorded Webinar](#)
  - How to setup and utilize quick tickets for additional work
10. **Sales Best Practices** - [Article](#)
  - How to create and manage sales goals, pipeline, additional best practices
11. **Sales Scorecards** - [Recorded Webinar](#)
  - How to create and utilize Sales Scorecards to set and track sales goals.
  - Additional Reading - [Sales Scorecard Article](#)

12. **Site Audits** - [Recorded Webinar](#)

- Overview of how-to setup and use Site Audits

13. **Electronic Signatures** - [Article](#)

- Overview of setup and use of Electronic Signatures

14. **Electronic Payments** - [Recorded Webinar](#)

- Overview of setup and use of Electronic Payments

15. **Accounting**

- Accounting 101 - [Session 1 Recorded Webinar](#)
- Accounting 101 - [Session 2 Recorded Webinar](#)