Controller 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. **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
3. **Crew Mobile** – Recorded Webinar
   - Clocking in/out, adding materials, navigating Crew Mobile
4. **Payroll**
   - Overview of Payroll Setup in Aspire
   - Payroll 101 - Recorded Webinar
   - Payroll 201 - Recorded Webinar
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. **Accounting**
   - Accounting 101 - Session 1 Recorded Webinar
   - Accounting 101 - Session 2 Recorded Webinar
   - Accounting 201 - Session 1 Recorded Webinar
   - Accounting 201 - Session 2 Recorded Webinar
   - Accounting 301 - Live Classroom Calendar