Sales 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. **Contract Estimating** - Overview
   - Invoice Types
   - Fixed Payment Schedule Screen
   - As Needed Services
   - T&M Recorded Webinar
3. **Work Order Estimating** - Overview
   - Invoice Types
   - Fixed Price on a Payment Schedule
   - Fixed Price Open Billing
4. **Change Orders/Contract Changes**
   - Changing a Contract
   - Changing a Work Order
5. **Invoicing**
   - Invoice Types and Invoicing Assistant
   - Invoicing 101 - Recorded Webinar
6. **Sales Best Practices** - Article
   - How to create and manage sales goals, pipeline, additional best practices
7. **Sales Scorecards** - Recorded Webinar
   - How to create and utilize Sales Scorecards to set and track sales goals.
   - Additional Reading - Sales Scorecard Article
8. **Site Audits** - Recorded Webinar
   - Overview of how-to setup and use Site Audits
9. **Contract Renewals** - Article
   - Overview of the Contract Renewal Report
10. **Electronic Signatures** - Article
    - Overview of setup and use of Electronic Signatures