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BOSS University

Course Agenda

Version 8.4.4

Created By
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Table of Contents

1. NEW USER TRAINING (16 HOURS)	3
ALL USER GROUPS (1.0 HOUR)	3
SALES AND ACCOUNT MANAGEMENT (4.5 HOURS).....	3
PRODUCTION AND OPERATIONS (5.0 HOURS)	3
PURCHASING (2.0 HOURS).....	4
BILLING (1.0 HOUR)	4
2. SALES TRAINING (8 HOURS)	5
SALES AND ACCOUNT MANAGEMENT.....	5
3. PRODUCTION TRAINING (8 HOURS)	6
PRODUCTION AND OPERATIONS	6
4. ADVANCED TRAINING (16 HOURS)	7
AGENDA	7
OPTIONS	7

1. New User Training (16 Hours)

All User Groups (1.0 hour)

- Concepts (PowerPoint)
 - Organization Structure - Hierarchy
 - Employees
 - Customers
 - Contacts
 - Properties
 - Branches/Territories
- Workflows
- System Overview / Controls
- User Preferences
- Home Tab

Sales and Account Management (4.5 Hours)

- CRM – Properties, Customers, Contacts
- Properties Module
- Creating a New Property
- Contracts
- Opportunities / Creating Contracts
- Work Orders
- Construction Work Orders (Self Study)
- *Section Exercise*
- *Homework Exercise*

Production and Operations (5.0 Hours)

- Forecasting
- Creating Tickets
- Scheduling: Production Dashboard
- Time Reporting
- Enter Job Ticket Time (Job Ticket Clock Timesheet)
- Enter Job Time (Mobile)
- Time Approval
- Allocate Material

- Issues
- *Section Exercise*
- *Homework Exercise*

Purchasing (2.0 Hours)

- Creating PO's
- Material Management Module
- PO Receipts
- Approving for Payment
- Material Allocation
- *Section Exercise*

Billing (1.0 Hour)

- Job Ticket Approval
- Generate Invoices
- Progress Billing
- Invoice Batches
- Manage Invoices
- *Section Exercise*

2. Sales Training (8 Hours)

Sales and Account Management

- CRM – Properties, Customers, Contacts
- Properties Module
- Creating a New Property
- Contracts
- Opportunities / Creating Contracts
- Work Orders
- *Section Exercise*
- Construction Work Orders
- Job Templates
- Sales Dashboard
- Work Order Automation
- Customer Portal
- Flower Module
- Address Maintenance Module
- Reporting

3. Production Training (8 Hours)

Production and Operations

- Forecasting
- Creating Tickets
- Scheduling: Production Dashboard
- Time Reporting
- Enter Job Ticket Time (Job Ticket Clock Timesheet)
- Enter Job Time (Mobile)
- Time Approval
- Allocate Material
- Issues
- *Section Exercise*
- Mobile application/FSE
- Snow
- Service Notification
- Chemical Mixtures
- Chemical Reporting
- Reforecast
- Address Maintenance Module
- Reporting

4. Advanced Training (16 Hours)

Agenda

- BOSS Overview
 - CRM, Contracts
 - Production Dashboard
 - Default Scheduling
 - Time and Material entry
 - Purchase Orders
 - Invoicing
- Administration
- Month End Checklist
- Mobile application/FSE
- Construction Work Order
- Service Catalog
- Email Templates
- Job Templates

Options

- Snow
- Sales Dashboard
- Service Notification
- Work Order Automation
- Chemical Mixtures
- Chemical Reporting
- Price Lists
- Reforecast
- Customer Portal
- Reporting
- Flower Module
- User Defined Fields
- Address Maintenance Module