

The Integra Group, Inc.
714 Spirit 40 Park Dr., Suite 150
Chesterfield, MO 63005
www.TheIntegraGroup.com
636.449.3300



BOSS University Courses

Version 9.0.0



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1. BOSS Certification

BOSS Certification exams are available to help ensure that your employees are properly trained to make the most out of BOSS. Please reach out to support@bossim.com if you are interested in pursuing any of the following certifications.

Basic Certification

- Sales Certification (2.0 hours)
 - Objectives include: Managing leads and properties, creating various types of work orders and contracts, and reporting.
- Operations Certification (1.0 hour)
 - Objectives include: Forecasting work, the production dashboard (scheduling tickets/visits, default schedules, time entry), creating issues, using BOSS mobile, and reporting.
- Purchasing Certification (1.0 hour)
 - Objectives include: Managing purchase orders and purchase order receipts, using material management, and reporting.
- System Certification (1.0 hour)
 - Objectives include: Modifying tabs and roles, action securities, report access by role, general system and branch settings, and managing available lists.

Advanced Certification

- Accounting Certification (2.0 hours)
 - Objectives include: Managing invoices and advanced purchase order/receipt options, employee setup and payroll, and reporting.
- Operations Certification – Advanced (1.0 hours)
 - Objectives include: Service notifications, chemical applications, reforecasting jobs, managing tickets and ticket approval, issue creation, account management, and advanced reporting.

2. 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*

3. 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

4. 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

5. Advanced Training (16 Hours)

Agenda

- BOSS Overview
 - CRM, Contracts
 - Production Dashboard
 - Default Scheduling
 - Time and Material entry
 - Purchase Orders
 - Invoicing
- Administration
- Month End Checklist
- Account Management Mobile
- Construction Work Order
- Service Catalog
- Email Templates
- Job Templates
- Mass Edit Tickets

Options

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

6. Snow Training (10 Hours)

Overview (1.0 Hour)

Class and Presenter Introductions

General Concepts & Overview Demonstration

- Service Categories
- Snow Events
- Snow Seasons
- Snow Zones
- Snow Crews
- Snow Dashboard
- Snow Plans
- Snow Portal

Catalog Specifics (1.0 Hour)

Services (Generalized)

- For T&M Work Orders
- For Seasonal Contracts

Services (Specific)

- For Per Occurrence Contracts

Service Items

- For Normal Jobs
- For Equipment Only Jobs

Snow Bidding and Sales (1.0 Hour)

Time and Material Work Orders

Seasonal Contracts

Per Occurrence Contracts

- Invoice Per Event (or Series of Events)
- Invoice Per Push (or Per Application)
- Invoice Per Inch (or Per Accumulation)

Snow Bidding Exercise (1.0 Hour)

Time and Material Work Orders

Seasonal Contracts

Per Occurrence Contracts

Snow Configurations (1.0 Hour)

Service Categories

- Linking Services to Service Categories
- Modifying the Default Service Categories
- Adding Additional Custom Service Categories

Snow Season

- Adding a Snow Season
- Adjusting a Snow Season
- Deleting a Snow Season
- Using the Snow Season page

Snow Zones

- Adding a Snow Zone
- Adding Properties to a Snow Zone
 - Individually
 - In Mass
- Removing Properties from a Snow Zone
 - Individually
 - In Mass
- Moving Properties between Snow Zones
- Deleting a Snow Zone

Snow Crews

Configuring Snow Crews

- Adding Snow Crews
- Deactivating Snow Crews

Using Snow Crews

- Available for Work

“Snow Configurations” Exercise

Snow Plans (1.0 Hour)

Benefits of Snow Plans

Examples of Snow Plans

Using Snow Plans

- Creating Snow Plans
 - From Scratch
 - Save a Snow Plan as Another Plan
 - Save a Snow Event as a Plan
- Editing Snow Plans
- Publishing Snow Plans

“Snow Plans” Exercise

Production – Part 1 (1.5 Hour)

Snow Events

- Creating a New Snow Event
- Updating a Snow Event
- Generating Work for a Snow Event
 - Without a Snow Plan
 - With a Snow Plan

Snow Dashboard

- Viewing Events and Zones
- Assigning Work
- Reassigning Work
- Creating Additional Service Category Work
- Manual Options
 - Status Updates
 - Time Entries
- Snow Properties Module

BOSS Mobile

- Viewing
- Working
- Materials

“Managing a Snow Event” Exercise

Production – Part 2 (1.5 Hour)

Snow Dashboard

- Collecting
- Ticketing
- Reviewing

Snow Events

- Completing
- Invoicing

“Managing a Snow Event” Exercise (Continued)

Additional Topics - Optional Features (1.0 Hour)

Additional Property Information

- Hours of Operation
- Holidays
- Approval Requirements
- Service Notifications

Snow Notes

- Property Snow Notes
- Event Notes
- Mobile Crew Notes

Weather Data

- Configuring Weather Data
 - Measurement Sources
 - Measurement Unit Types
 - Weather Conditions
- Capturing Weather Data
 - BOSS Mobile
 - BOSS Main (Property, City, and Zone Level)
- Finalizing Weather Data
- Presenting Weather Data (Snow Report)