Employee Training Planner

Company: _____

Training location   **State:** _____   **City:** _____

#	Employee Name	Employee Position	Enterprise knowledge level -1-10	Implementation & Set-up including Workflow Consultation, System Set-up, Form Set-up, Accounting Link install, Database Import, Supplier Price File Import	1. Basic Navigation / Alerts / Help	2. Customers	3. Sites	4. Suppliers	5. Employees and Contractors	6. Catalogues Management / Pre-builds / Take-off Templates	7. Leads	8. Service Quotes	9. Service Jobs	10. Scheduling	11. Jobcards / Contractor W/O's / Time Sheets, Run Sheets	12. Purchase Orders	13. Mobility – simPRO Connect	14. Service Invoices	15. Project Quotes / Estimating	16. Project Jobs / Management	17. Project Invoices	18. Subcontractor Management	19. Customer Assets	20. Materials Management / Stock	21. Maintenance Planner	22. Recurring Jobs	23. Recurring Invoices	24. Tasks	25. Accounting Link	26. Plant	27. Reports	28. Add-ons – Customer, Employee & Contractor Portals	29. Add-ons - Barcodes, eForms, simTRAC, POS, Call Centre
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15																																	
	Total Employees to be trained in modules																																

Please note: *Complete a form for each location and notify your trainer if the same training material need to be repeated multiple groups of team members for planning purposes*