* **YC Process General Overview Screenshots**- sent to client before or after my welcome call post contract signature. Sometimes clients would ask for this during the Sales process.
* **Phases**– The would be send to clients during sales and/or once they signed the contract. Normally would only send this if they asked for it otherwise phases would be explained on our kick off call and presented on my Client Success Road Map.
* **Sample Screenshot of my Client Success Road Map**– This is what I would use from week to week live on any client calls to show the progress of their onboard. This is a clients sample so I blurred out their information.
* **Request Type Selection-**We would discuss the first set of configurations on a call and then sent this document that reviews what a request type is and some examples.
* **Property Cat\_Type instructions –** Explains what we are looking for regarding these two fields on a property record.
* **YC Standard PropTypeCat and Prop Type Lists –** Workbook with default selections sent to the client to complete their selections for the Property Cat/Type dropdown values in their YouConnect site.
* **Property Record –** Screenshots and explanations of fields within the Property record.
* **Request Record –**Screenshots and explanations of fields within the Request info panel.
* **Review Record** – Screenshots and explanations of fields within the Review panel.
* **Samples of Vendor Grade Weighted Average**– Provides an example of Vendor Grading with weighted average criteria.
* **Document Type Name**– Description of field and list of sample options.
* **Reject Reasons**– Current list of default options.
* **Workflow Timers**– Description of each configuration workflow timer.