

CASE MANAGER TRAINING PROGRAM

MODULE	LESSON	COMPLETED	NOTES
<i>Before you begin</i>	Before you begin	<input type="checkbox"/>	
	Create user account (optional)	<input type="checkbox"/>	
<i>Case management</i>	Intro	<input type="checkbox"/>	
	The Case List	<input type="checkbox"/>	
	Case information	<input type="checkbox"/>	
	Contacts and cases	<input type="checkbox"/>	
	Lab - Working with a case	<input type="checkbox"/>	
	Understanding the grid	<input type="checkbox"/>	
	Lab - Working with the grid	<input type="checkbox"/>	
	Lab - Print and export	<input type="checkbox"/>	
	Quiz	<input type="checkbox"/>	
	<i>Documents</i>	Intro	<input type="checkbox"/>
Documentation grid		<input type="checkbox"/>	
Types of document		<input type="checkbox"/>	
Lab - Documents		<input type="checkbox"/>	
Lab - Word documents		<input type="checkbox"/>	
Quiz		<input type="checkbox"/>	
<i>Costs and estimates</i>	Intro	<input type="checkbox"/>	
	Estimates	<input type="checkbox"/>	
	Lab - Estimates	<input type="checkbox"/>	
	Costs	<input type="checkbox"/>	
	Adding costs	<input type="checkbox"/>	
	Lab - Adding costs	<input type="checkbox"/>	
	Quiz	<input type="checkbox"/>	
<i>Tasks and calendars</i>	Intro	<input type="checkbox"/>	
	Tasks and reminders	<input type="checkbox"/>	
	Lab - Tasks & reminders	<input type="checkbox"/>	
	Reminders window	<input type="checkbox"/>	
	Lab - Reminders	<input type="checkbox"/>	
	Task management	<input type="checkbox"/>	
	Lab - Task management	<input type="checkbox"/>	
	Appointments and calendars	<input type="checkbox"/>	
	Lab - Appointments and calendars	<input type="checkbox"/>	

	Quiz	<input type="checkbox"/>	
<i>Accounting</i>	Intro	<input type="checkbox"/>	
	Account grid	<input type="checkbox"/>	
	Invoices	<input type="checkbox"/>	
	Payments	<input type="checkbox"/>	
	Lab - Invoices	<input type="checkbox"/>	
	Designing and printing invoices	<input type="checkbox"/>	
	Integrating with accounting software	<input type="checkbox"/>	
	Quiz	<input type="checkbox"/>	
<i>Workflows</i>	Intro	<input type="checkbox"/>	
	Create a workflow	<input type="checkbox"/>	
	Lab - Workflows	<input type="checkbox"/>	
	Quiz	<input type="checkbox"/>	
<i>Reports</i>	Intro	<input type="checkbox"/>	
	Ad hoc reports	<input type="checkbox"/>	
	Standard reports	<input type="checkbox"/>	
	Lab - Reports	<input type="checkbox"/>	
	Quiz	<input type="checkbox"/>	
<i>Administration</i>	Intro	<input type="checkbox"/>	
	Costs administration	<input type="checkbox"/>	
	Case administration	<input type="checkbox"/>	
	Employee administration	<input type="checkbox"/>	
	Lab - Administration	<input type="checkbox"/>	
	Templates & Case Manager	<input type="checkbox"/>	
	Lab - Templates	<input type="checkbox"/>	
	Lab - Estimate templates	<input type="checkbox"/>	
	Custom fields	<input type="checkbox"/>	
	Lab - Custom fields	<input type="checkbox"/>	
	Quality management	<input type="checkbox"/>	
	Lab - Quality management	<input type="checkbox"/>	
	Backup plan	<input type="checkbox"/>	
	Quiz	<input type="checkbox"/>	
<i>Graduation</i>	Congratulations	<input type="checkbox"/>	
	Next steps	<input type="checkbox"/>	