



TEAM TRAINING OUTLINE

Team Name:

This document is to help prepare your Customer Success representative for the Team Training Call. Take a moment to think about the process you want your team to follow in inMotion. For example, will your Staff Users need to know how to approve incoming Job Launch requests? If yes, check the boxes for "Job Launch"; otherwise, leave them unchecked. The idea is to train Staff Users only on the functions they require to get the job done.

Please be prepared to talk about your specific process as it relates to each section of the training.

Project Workspace

- Project Dashboard
 - Overview
 - Add/Edit Schedule
 - Edit Team Members
 - Update Priority/Status

Proof Workspace

- Post Proof for Review
 - Choose Reviewers
 - Workflows
 - Review Teams
 - Post Proof on Hold
- Review Content
- Reviewing Edits
- Posting a New Version of a Proof
- Proof Info Page

Job Launch Workspace

- Approve Incoming Requests

My Job Launch

- Submit Job Launch Requests
- Edit Job Launch Requests
- Duplicate Job Launch Requests

Deadline Calendar

Timesheets

Contacts

- Add/Edit Contacts
- Add/Edit Review Teams/Workflows

Tasks

- My Tasks

Reports

Account

- Project Archive
- Proof Archive
- Project Templates
- Proof Templates