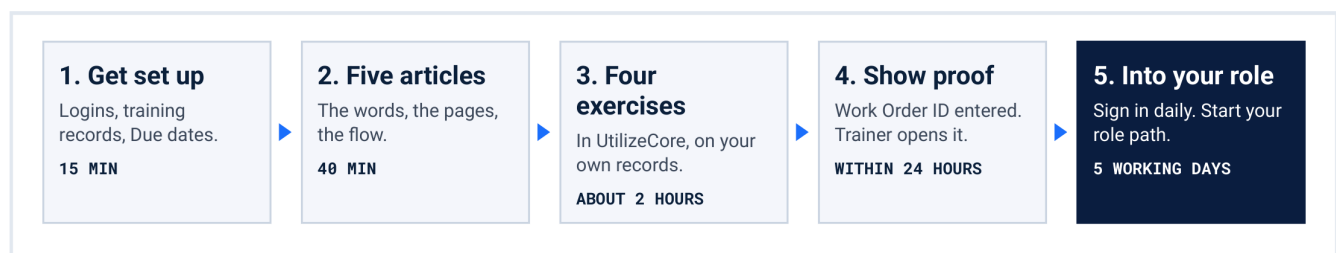


New Hire *Training Path*.

Your first week in UtilizeCore: the words, the pages, and one Work Order run end to end. Next comes your role path: Dispatcher, Operations Lead, Admin, AP, AR, Vendor Manager or Field.

Applies to: Everyone new to UtilizeCore at your company, before their role path



Three people get you *ready*.

WHO	HAS IT READY	CHECK
You	Platform invite accepted (Log In for the First Time) and the UtilizeCore Mobile App installed. The same login works on both.	You can sign in on the web and in the app.
Internal UC Admin	Assigns your user role and permissions, and invites you to the TRAINING Client and TRAINING Vendor.	You can switch between all three companies (if applicable) and log in on both web and mobile.
UtilizeCore Technical Account Lead	Training program shared, training documentation provided, Due dates assigned.	You can see your assigned work in your training plan.

Five articles, *in this order*.

#	ARTICLE	WHAT YOU TAKE FROM IT
1	UtilizeCore Basics	Work Order, Trip, Visit. Client, Site, Vendor.
2	The Main Pages at a Glance	Where everything lives.
3	How a Work Order Moves	The seven phases and who owns each one.
4	Action Filters	How the work finds the right person.
5	Trip Status and Pin Legend	What every pin color means.

Four exercises. *Your hands on the keyboard.*

EXERCISE	YOU DO	DONE WHEN	TIME
1 · Get your bearings The Main Pages at a Glance	Open each module. Search for a Work Order by number or Trade. Edit your columns. Save a filter template.	A saved template with your name.	30 min
2 · Run a full cycle How a Work Order Moves	One Work Order end to end: dispatch, accept as the Vendor, check in and out, verify, invoice.	A verified Trip and a Draft Receivable.	45 min
3 · Assess a Work Order Trip Status and Pin Legend	On that Work Order: the pin, Activity, check-in icon, photos, Rate Type on the invoice.	A note saying what happened, in your words.	20 min
4 · Find your work in the Action Filters Action Filters	Find it in its Action Filter. Name the Action Filters your role owns.	A note naming them and your handoffs.	25 min

Show proof. Name each record exactly as your board row says, your name at the end (**TRAINING Exercise 2 - Sam Rivera**). Enter the ID in Proof and answer the three questions. Your trainer opens it within 24 hours. **No proof, no next exercise.**

What you can do *on your own.*

YOU CAN NOW	PROVEN IN
Find any record and save your own view	Exercise 1
Explain a Work Order, a Trip and a Visit	Exercise 2
Read who did what, when, with what proof	Exercise 3
Name your Action Filters and handoffs	Exercise 4
Get help: help center, support request	Read

Into your role, *five days.*

EVERY WORKING DAY	TRAINER CHECKS
Sign in to UtilizeCore	Last sign-in date, each day
One live action in your role	Your name in a live Work Order's Activity
Your role path started	First exercise done, day 5
Done	Four proofs opened, five days signed in

Questions? Contact your Customer Success team or email support@utilizecore.com.