

steps to success

Before beginning your Steps to Success, make sure you can easily access all of the following:

Included in your CD shipment



Want to learn more about ServiceCEO?



Within ServiceCEO
 Press F1 from any ServiceCEO screen.



Online
 Simply point your browser to <http://support.insightdirect.com/help/onlinecd.htm>. Since we are constantly making improvements to the help system, we recommend that you use the latest version whenever possible. To find a specific topic, browse the Table of Contents, or quickly search for items using the index or Search box.

Accessible via Member Center

LIVE Training Classes
 Pre-Recorded **VIDEOS**
TRAINING Databases

step 1



train

Jump into ServiceCEO quickly and easily by getting started with our introductory training classes.

a Attend the **Starting RIGHT** class

For all ServiceCEO users

The class provides:

- Introduction to the Member Center
- Introduction to technical support
- Training Guide

b Attend **Basic Training** class

For all ServiceCEO users

The class provides a survey of all the basic ServiceCEO functionality.

step 2



install

Now that you've learned the basics, it's time to install ServiceCEO on your computer(s).

a Install your software

Please read the "Installing ServiceCEO" section of the Installation Guide.

b Install a Demo Database for practice in Step 3

Please read the Installing a New Database section of the Installation Guide or online ServiceCEO Help System.

Use the demo database that was shipped with your product CD or download a database configured for your industry from the Database Library section of the Member Center.

c Connect other computers to the ServiceCEO database if necessary

Please read the "Network Configuration Overview" section of the Installation Guide.

step 3



practice

With ServiceCEO installed, you can now start practicing using a demo database!

a Follow **Implementation Training**

For anyone responsible for setting up and configuring the ServiceCEO database

Click on "Implementation Training" and follow the steps – IN ORDER – to configure your database to fit your business.

b Practice using ServiceCEO with a demo database

For all ServiceCEO users

NOTE: At this stage, only enter enough information to practice using the application. Don't enter all your customer information.

Practice each of the following basic ServiceCEO tasks:

- Add a new customer
- Create a team
- Schedule a job
- Create a work order
- Complete a job
- Create and send an invoice
- Configure and calculate payroll

step 4



go live!

You've trained, installed, practiced. It's time to start using ServiceCEO to run your business!

a Clean practice data from the demo database

"Cleaning" the practice data means that you will be deleting all the customer and job information you entered into the demo database, but retaining your setup configuration.

To clean the data, follow the instructions available in the Database Library section of the Member Center or search for "database purge" in the Knowledge Base.

b Activate your ServiceCEO database

Please read the Activation Code topic of the Installation Guide or online ServiceCEO Help System or watch the "How to Get Your Activation/License Codes" pre-recorded video.

c Start using ServiceCEO to run your business!