

commonsku New Hire Training Roadmap

This roadmap is designed to take a new team member from "Login" to "Launch" in their first week. By following this structured path, the new hire gains hands-on experience while ensuring company workflows remain consistent.

Phase 1: The Foundation (Days 1–2)

Goal: Understand the "Why" and "How" of the platform through live interaction and expert-led overviews.

- **Attend Live Onboarding Webinars:**
 - [Onboarding 1 \(Sales Basics\)](#)
 - [Onboarding 2 \(Production/Finance\)](#)
- **Guided In-App Tours:** Open the **Learning Center** (skubot on the right-hand side) in commonsku and complete the "Basics" tours. This is the best way to get a "feel" for the interface while the webinar info is fresh.
- **Review Company Recordings:** Watch your team's previous onboarding sessions in **Google Drive** to understand your company's specific "house rules."

Phase 2: Role-Specific Mastery (Days 3–4)

Goal: Deep dive into the tools you will use every day.

- **commonsku University:** Watch the **Beginner Module** videos for your specific role (Sales, Production, or Finance). These are short, focused tutorials on specific features.

- **Help Articles:** Use the **Help Articles** to review step-by-step written guides for the tasks covered in your videos.
- **Knowledge Check:** Complete the **Skill-Testing Quiz** in the Learning Center.

Phase 3: The "Sandbox" Assignment (Day 5)

Goal: Practical application. *Note: When testing, always use your own email address as the "Client" or "Supplier" to avoid sending test data to real partners!*

Sales Role	Production Role	Finance Role
<p>1. Create 3 Test Projects: Include a presentation with 4–5 items.</p>	<p>1. Order Setup: Create a Sales Order with 3 items and custom decoration.</p> <p><i>* Work with your sales team to get this set up</i></p>	<p>1. Bill Entry: Enter 2–3 Supplier Bills (Vouchers) into a test project.</p> <p><i>* Work with your sales and production team to get the sales order and POs set up</i></p>
<p>2. Customization: Set custom pricing, images, and decoration details.</p>	<p>2. Complex Shipping: Set one item "Direct to Client" and one to a "Decorator."</p>	<p>2. Client Invoicing: Create and "send" an invoice to your own email.</p>
<p>3. Conversion: Convert to a Sales Order; update sizes, colors, and quantities.</p>	<p>3. Purchase Orders: Generate and "submit" POs (<i>note: email them to yourself</i>).</p>	<p>3. Payment: Record a manual payment to move the invoice to "Paid."</p>

<p>4. Communication: Email forms to yourself to see status changes.</p>	<p>4. Verification: Ensure the project status moves to "Submitted."</p>	<p>4. Completion: Mark the project "Completed" and view it in the Export tab.</p>
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Phase 4: Verification & Graduation

Goal: Confirming knowledge retention.

- **Skill Testing:** Complete the Quiz Skill Tests in the Learning Center for your module.
- **Manager Review:** Touch base with your manager to go through any best practices.



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Employee Name: _____

Start Date: _____

Phase 1: The Foundation (Days 1-2)

Task	Resource	Date	Initials
Onboarding 1 Webinar	Live (Mon/Tue @ 1 PM ET)		
Onboarding 2 Webinar	Live (Tue/Wed @ 2 PM ET)		
Basics Guided Tours	Learning Center (In-App)		
Company Recordings	Internal Google Drive Folder		

Phase 2: Role-Specific Mastery (Days 3-4)

Task	Resource	Date	Initials
Beginner Module Videos	commonsku University		
Help Article Review	Help Center (Knowledge Base)		
Knowledge Check Quiz	Learning Center (Skill Test)		

Phase 3: The "Sandbox" Homework (Day 5)

Complete the track relevant to your specific role.

Sales Track

- Create 3 Test Projects:** Include a presentation with 4–5 items.
- Customization:** Set custom pricing, images, and decoration details.
- Conversion:** Convert to a Sales Order; update sizes, colors, and quantities.
- Communication:** Email forms to yourself to see status changes.

Production Track

- Order Setup:** Create a Sales Order with 3 items and custom decoration.
- Logistics:** Set one item "Direct to Client" and one to a "Decorator."
- Purchase Orders:** Generate and "submit" POs (Email to yourself).
- Verification:** Ensure the project status moves to "**Ordered.**"

Finance Track

- Bill Entry:** Enter 2–3 **Supplier Bills (Vouchers)** into a test project.
- Invoicing:** Generate and "send" a Client Invoice to your own email.
- Payment:** Record a manual payment to move the invoice to "**Paid.**"
- Completion:** Mark the project "**Completed**" and view it in the **Export** tab.

Phase 4: Graduation & Review

Final Milestone	Date Completed	Manager Sign-off
Project Walkthrough		
Workflow Alignment		

Manager Note: Review naming conventions and internal tags with your new hire to match your company's specific standards before the new hire begins live client work.