

# Quick Start Guide

## *to Berkshire's Customer Community Portal*

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# Welcome to Berkshire's Customer Community

## Join in Shared Community Activities

We at Berkshire invite you to join our shared Community, where you can interact with fellow Human Resource professionals and your Berkshire contacts to:

- Access Berkshire **Resources** that will help you as a professional
- Ask a question and get solutions from peers in **Ask Community**
- Join groups and connect with other members in the **Community Group**
- Upload and share communication, information, and documents

## Manage your Private Berkshire Account Information

The portal is also the gateway for overseeing your Berkshire account.

## What this Guide Covers

This *Quick Start Guide* is a brief introduction to commonly used features and does not cover every activity or function available in the portal. In many instances, the described activity can be performed using more than one method.

## Feedback on this Guide

We would value your feedback on this *Quick Start Guide*. If you have any suggestions for improving the guide, please open a support [Case](#), and let us know.

## Privacy

Berkshire and the Website host of the Berkshire Community Portal are committed to protecting your privacy. Therefore, the portal is separated into **shared** and **private** sections, as outlined above.

**Information you choose to share on the Berkshire Community site is visible to authorized Berkshire employees and Community members only.** While you are engaged with the Berkshire Community, options will appear to give you control over what others see about you.

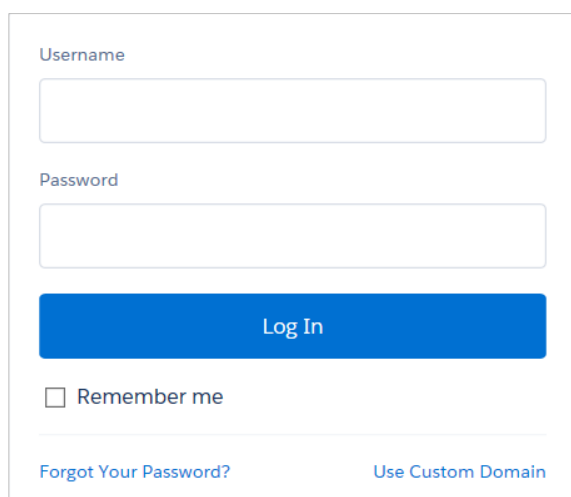
Specific details related to your product and services account with Berkshire can only be seen by authorized users at your organization. For the full privacy statement, login to the portal's **Community Home** page, and proceed to a link at the bottom of the page: **[Privacy Statement](#)**.

## Log into the Customer Community

### First-time Users

The portal administrator will send an email with instructions to log in and set up your Password. After log in, a security question should be added. For more information, see this guide's section on: [Change your Password](#).

1. Using Chrome, Internet Explorer, Mozilla Firefox, or Safari, go to:  
**<https://berkshirecustomercommunity.force.com/Customers/login>**
2. Enter Username (your email address) and Password.
3. (Optional) Check the box to: Remember me.
4. Click the **Log In** bar.

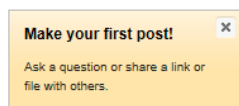
A screenshot of the login page for the Berkshire Customer Community. It features a white background with a light gray border. At the top, the word 'Username' is in a small blue font above a white text input field. Below that, the word 'Password' is in a small blue font above another white text input field. A prominent blue rectangular button with the text 'Log In' in white is centered below the password field. Underneath the button is a checkbox followed by the text 'Remember me'. At the bottom left, there is a blue link that says 'Forgot Your Password?'. At the bottom right, there is a blue link that says 'Use Custom Domain'.


### Forgot your Password

Click the link below the log-in *fields* for: **[Forgot Your Password?](#)** Enter Username, and click **Continue**. Follow the prompts to reset your Password. You will receive a message at the email account associated with your Username.

## Help

### Hint Captions



To assist you with new features and functions, take advantage of pop-up hints, which appear in yellow captions. To close the hint, click the  **Close** button in the upper right corner.

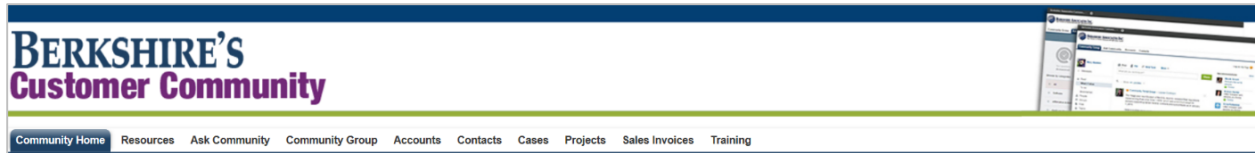
### Technical Support

For issues related to using the Berkshire Community portal, please contact your Berkshire Account Executive or contact: [product.support@berkshireassociates.com](mailto:product.support@berkshireassociates.com).

## Getting Started with Community Home

The **Community Home** is the launching pad for the Berkshire Community portal, and the first tab in the portal's *tab header*.

### Tab Header



Along with the **Community Home** tab, a series of other tabs provide access to shared (Community) and private (Account) content.

Community content includes:

- [Resources](#)
- [Ask Community](#)
- [Community Group](#)

Depending on your system credentials, you may have access to one or more of the client-specific tabs:







- **Accounts**
- **Contacts**
- **Cases**
- **Projects / Products and Services**
- **Sales Invoices**
- **Training**

Please refer to corresponding chapters in this guide for an introduction to portal activities.


## Use the Quick Access Icons



Under the **What Would You Like to Do?** banner across the bottom of the **Community Home** page, icons will direct you to key tabs, or areas of interest, within the portal, as outlined below:

Icon Label	Tab
<b>Ask</b>	 <b>Ask Community</b>
<b>Chat</b>	 <b>Community Group</b>
<b>Learn</b>	 <b>Resources</b>
<b>View</b>	 <b>Accounts</b>
<b>Get Help</b>	 <b>Cases</b>
<b>Contact Us</b>	 <b>Berkshire contact form</b>

## Contact Berkshire

If you ever need more information from Berkshire, simply go to **Community Home**, and click the  **Contact Us** icon. After filling out the form, click the **Submit** button. Berkshire's address, telephone number, and email are also stored here.

Contact Us

Request more information

Select...

Submit

Choose the software you wish to see

Select...

When would you like to schedule the demo?

Select...

Submit

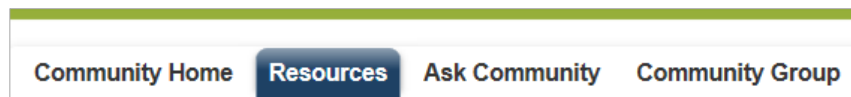
Headquarters

Berkshire Associates Inc.  
8924 McGraw Court  
Columbia, MD 21045

Phone

410.995.1195

## Learn (with) Resources



Berkshire has collected a library of HR resources in the portal so you can learn about Affirmative Action planning, compliance topics, OFCCP audits, applicant management and recruitment, and more. Simply click **Resources**, the second tab from the left in the *tab header*.

In the *center pane*, a table of articles will appear. Articles may be sorted up or down by Article (title), Type, and Published Date by clicking on the appropriate *column header*.

Article ▲	Type	Published Date
<b><u>FAQ: Complying with Nondiscrimination Provisions: Criminal Record Restrictions</u></b> On January 29, 2013, OFCCP issued Directive 306, "Complying with Nondiscrimination Provisions: Criminal Record Restrictions and Discrimination Based on Race and National Origin."	FAQ	October 6, 2015
<b><u>Guide to Individuals With Disabilities Recruitment Employment Resources</u></b> The unemployment rate for Individuals with Disabilities (IWDs) is generally twice the population, and federal contractors are required to conduct outreach as part of their affirmative action plans. Berkshire has compiled a list of online resources to get you started.	Guide	October 1, 2015
<b><u>Guide to Veterans Recruitment Employment Resources</u></b> This document provides an alphabetical list of resources that federal contractors may find useful when engaging in outreach towards qualified protected Veterans. This document contains information and links to information created and maintained by public and private organizations other than Berkshire. Berkshire cannot guarantee the accuracy, relevance, timeliness, or completeness of this information, nor does it endorse any products or services offered by the listed organizations.	Guide	October 1, 2015

To read through additional pages, click the  **Next** button at the bottom of the page. Articles may be searched or filtered to reduce how many are displayed, as described next.

### Search Bar

**Search Knowledge**

At the top of the page, enter one or more key words for a specific topic into the Search Knowledge *field*. Then hit ENTER on your keyboard.

**Search Knowledge**

✕

Click the **✕ Delete** icon in the search *field* to clear the search entry. To restore the full table of articles, click the **Reset** button.

## Side Navigation Menu Filters

To assist with navigating **Resources**, the *side navigation menu* on the left-hand side of the page displays a “table of contents” for filters. By clicking on a filter description, the knowledge base will be reduced to show only the chosen category of interest. Two filter options are offered: Topics and Article Types.

### Search Filters

Search Filters	
Topics	
All	
Annual Plan Preparation	
Data Requirements	
General Guidance	
Implementation Documents	
Implementation Guidance	
Applicant Tracking and Recruitment	
Audit Resources	
Conciliation Agreements	
Submission Materials	
OFCCP Follow-Up Reports	
Onsite Visits	
What to Expect During an Audit	
Compensation	
Coverage	
Diversity and Inclusion	
Government Reporting	
Software	
BALANCEaap	
BALANCEtrak	



Topics
<i>The top-level filters, as listed below, are shown with gray shading.</i>
All
Annual Plan Preparation
Audit Resources
Software

#### Quick Tip:

As shown on the left, the topic will be shown in blue when a filter is in place.

### Article Types

Article Types
Article
Checklist
FAQ
Guide
Template
Webinar
Whitepaper

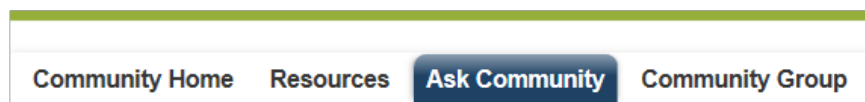


Article Types
Article
Checklist
FAQ
Guide
Template
Webinar
Whitepaper

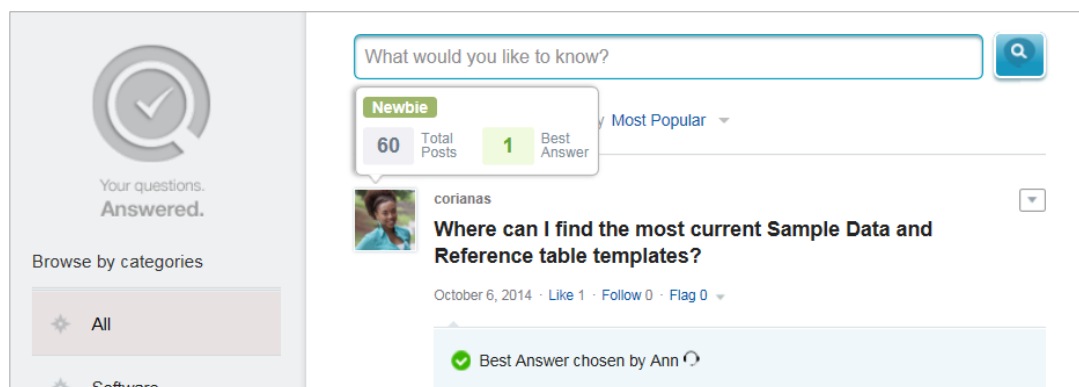
### Recently Published

The newest additions to **Resources** will be highlighted in a box, located on the right-side of the page.

## Ask (the) Community

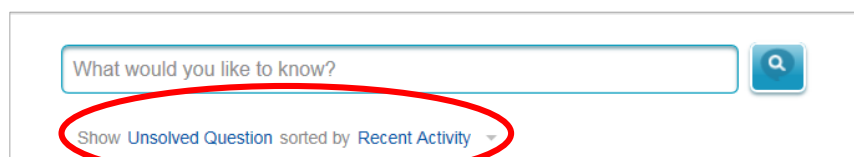


If you have a question about how to use software, want to understand a regulatory aspect of preparing an Affirmative Action plan, or want to know some time-saving tips for applicant flow, navigate to: **Ask Community**. In the community, Berkshire's staff and other members stand ready to answer your questions. Once answers are posted, one of our Berkshire experts will even highlight the "Best Answer" that solves your question.



### "Show" and Sort Content

To organize the view of questions and answers, use the **Show** menu links, located under the Search bar. Once the defaults are changed, the updated settings are retained on reentry.



The options for **Show** are:

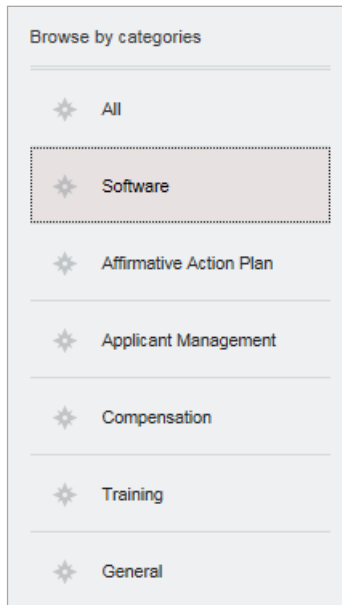
- All Question
- Unanswered Question
- Unsolved Question
- Solved Question
- My Question

**Sorted by** options are:

- Date Posted
- Recent Activity
- Most Popular



Categories are organized by category in the left-hand *column* for quick browsing:

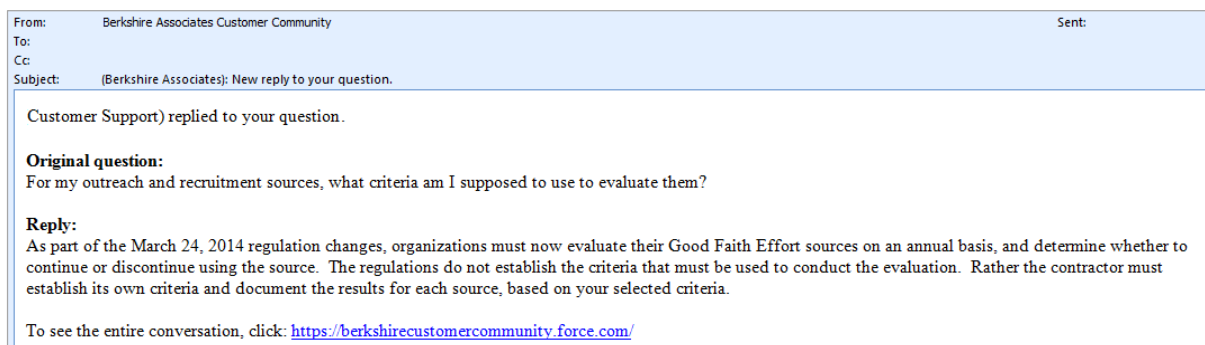


## Post a Question

1. Choose the **Ask Community** category in the *side navigation menu* that best matches the topic of your question to review existing questions and answers.
2. Enter your question in the upper Search bar, and hit **ENTER** on your keyboard.

3. Use the drop-down in the lower left of the menu to select the topic category. Then select **Post**.

4. When an Answer has been posted, the system will send a notification to your email address, containing a link to view the discussion.



**Quick Tip:** To opt out of receiving notifications, see: [Opt In or Out of Receiving Emails](#).

A summary, regarding your questions and their resolution, can be accessed from your **User Profile > Overview tab**, under the **Activity** header.

Activity	
Question Asked	2
Question Answered	1
Solved Question	1

## Reply to or Comment on an Answer

 Best Answer chosen by Carla Pittman

 corianas

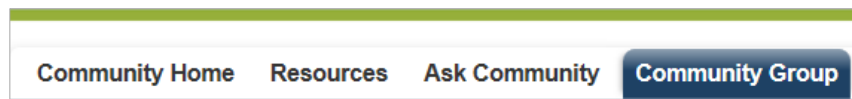
OFCCP requires all openings (excluding positions lasting for three days or less, those being filled internally, or high level executive positions) to be posted with the ESDS.

September 22, 2014 ·  2 ·  0 · Flag 0 ▾

Write an answer or comment...

1. Click the link below the answer post to: Write an answer or comment ...
2. Using the message palette, enter and format the reply.
3. Click the **Answer** button to post the reply.

## Chat (with the) Community Group



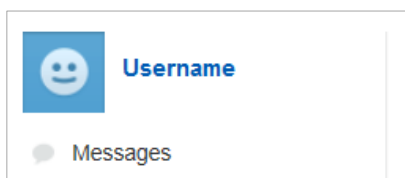
The **Community Group** tab, fourth tab from the left, focuses attention on posts and activities for the specific **Group(s)** you join and People you **Follow**. The central pane acts as the **Community Group** communication channel. Begin by reviewing and setting up your User Profile.

### Set up your Berkshire Community Profile and Edit Settings

Make sure you have landed on, or navigate to, the **Community Group** tab.

#### Add a Profile Photo

1. In the upper left-hand corner, click on the default Profile Photo icon (or your [Username](#) link) to open the User Profile page.



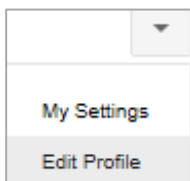
2. A larger image of the default icon will display. Hover the mouse over the image to display the [Add Photo](#) link.
  - a. Click [Add Photo](#) to open the Upload Profile Photo menu.
  - b. Click the **Browse** button, and locate the image file on your computer.

**Note:** The image must be in JPG, GIF, or PNG format, with a maximum file size of 8 MB.


- c. (Optional) Check the box to: Show my photo on publicly [Community] accessible pages.
- d. Click the **Save** button.
- e. Review the cropping of the photo, and drag or resize the outline as necessary.
- f. Click **Save** again.

## Edit Profile


1. From your User Profile page, click the  **Down Arrow**, located beneath the *tab header* at the upper right, to open a drop-down.
2. Select Edit Profile.



3. Use the **About** and **Contact** tabs to add or edit information.

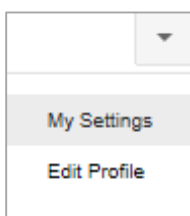
**Note:** For each *field*, hover your mouse over the  **Learn More** button to read about who will see the provided information.

4. Click the **Save All** button.

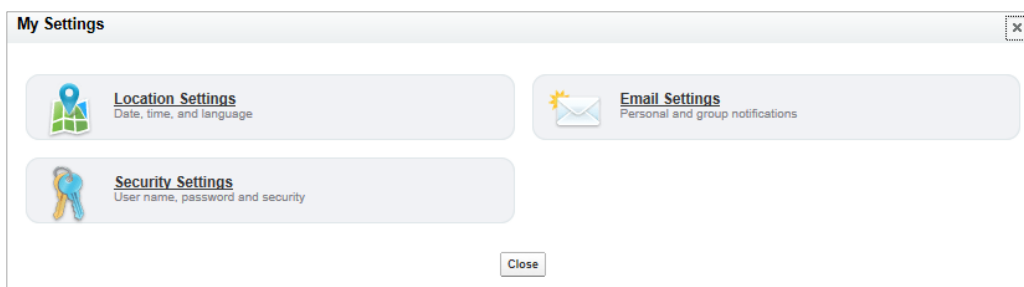
**Quick Tip:** From your User Profile page, click the  **Edit** icon adjacent to the **About Me** header to enter the Edit Profile menu.

## Edit “My Settings”

1. From your User Profile page, click the  **Down Arrow** button in the upper right corner to open a drop-down.
2. Select My Settings.



3. Choose one of three menu options:



- **Location Settings** — Language, Locale, and Time Zone
- **Security Settings** — Update Password and security Question and Answer, as described in the next section below.
- **Email Settings** — Choose whether to receive emails from Berkshire, and whether to receive emails as a result of various system activities by other community members, as described next.

### (Highly Recommended) Opt In or Out of Receiving Emails

1. From the **Community Group** > [User Profile] > **My Settings** > **Email Settings** menu, continue with the steps below.
2. Review the default settings carefully.
  - a. The top setting — Choose to receive Berkshire Associates Customer Community emails... — is the global setting, which initiates or turns off **all** receipt of email notifications.
  - b. Once the global setting above has been turned on, the main portion of the menu becomes active, controlling specific options to receive emails related to:
    - Follows
    - Posts or Likes
    - Mentions, Messages, or Endorsements
    - Comments
    - Flags

**Email Settings**

Choose to receive Berkshire Associates Customer Community emails so you don't miss important updates.

☒ Receive emails

<b>Follows</b> <input checked="" type="checkbox"/> Follows me	<b>Comments</b> <input checked="" type="checkbox"/> Comments on my status or a change I made <input checked="" type="checkbox"/> Comments on a post on my profile <input checked="" type="checkbox"/> Comments after me <input checked="" type="checkbox"/> Comments on an item I bookmarked <input checked="" type="checkbox"/> Comments on an item I like
<b>Posts or Likes</b> <input checked="" type="checkbox"/> Posts on my profile <input checked="" type="checkbox"/> Shares a post I made <input type="checkbox"/> Likes a post or a comment I made	<b>Flags</b> <input checked="" type="checkbox"/> Flags an item as inappropriate ⓘ
<b>Mentions, Messages, or Endorsements</b> <input checked="" type="checkbox"/> Mentions me in a post <input checked="" type="checkbox"/> Mentions me in a comment <input checked="" type="checkbox"/> Sends me a message	

Save Cancel

3. When the updated settings are satisfactory, click the **Save** button to apply them.

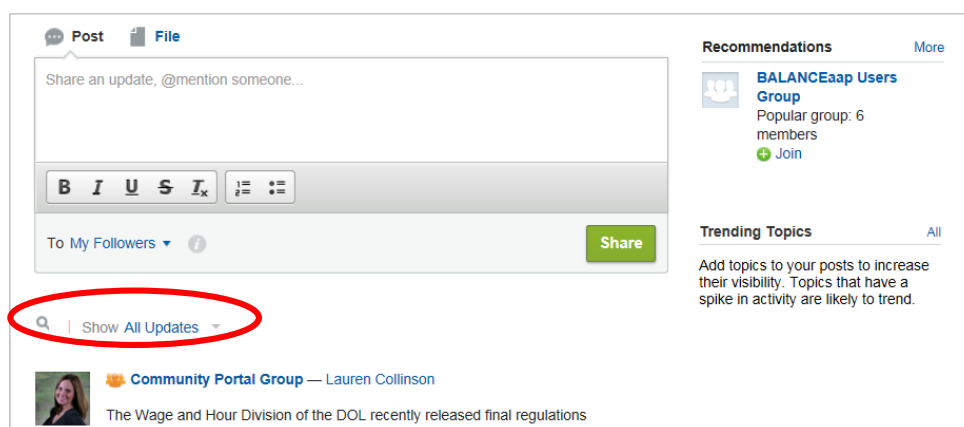
## Change your Password and Add/Edit the Security Question

After following the instructions above to open the **My Settings > Security Settings** menu, continue with the steps below:

1. Enter the Current Password.
2. Enter a New Password, and verify it by entering it a second time.
3. Select a Question from the provided drop-down to be used to verify your identity if you forget your password. Then enter an Answer for the selected Question.
4. Click **Save**.

**Note:** The Password must contain at least eight characters and a combination of letters and numbers.

## Search and “Show” Feed Content



Below the Post message palette are:

- A **Search** icon, for entering key words
- Access to a **Show** drop-down menu, with options to reduce how much and what Feed content is displayed.

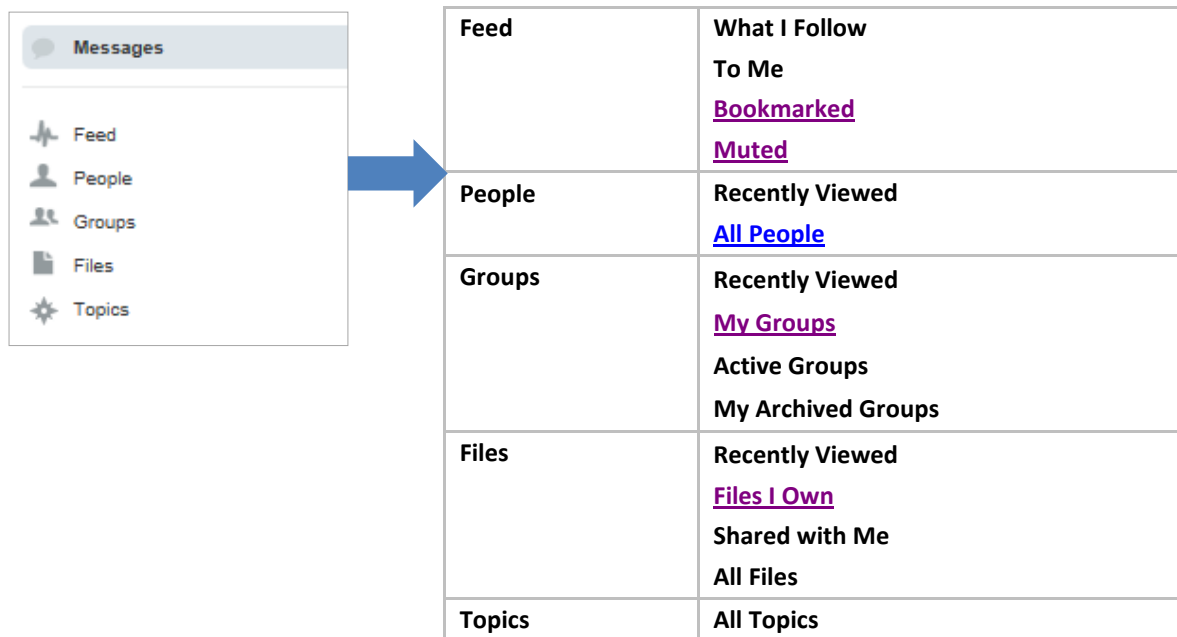
## Navigating Community Group Content

### Recommendations

In the right-hand *column* of **Community Group**, the portal will make **Recommendations** on Groups to Join and People to Follow, offering quick link buttons to do so. Alternative instructions for joining groups or following other members are included later in this section.

## Side Navigation Menu

The **Community Group** *side navigation menu*, on the left side, helps you view Messages by category. **Feed > What I Follow** is the default landing page.



## About Groups

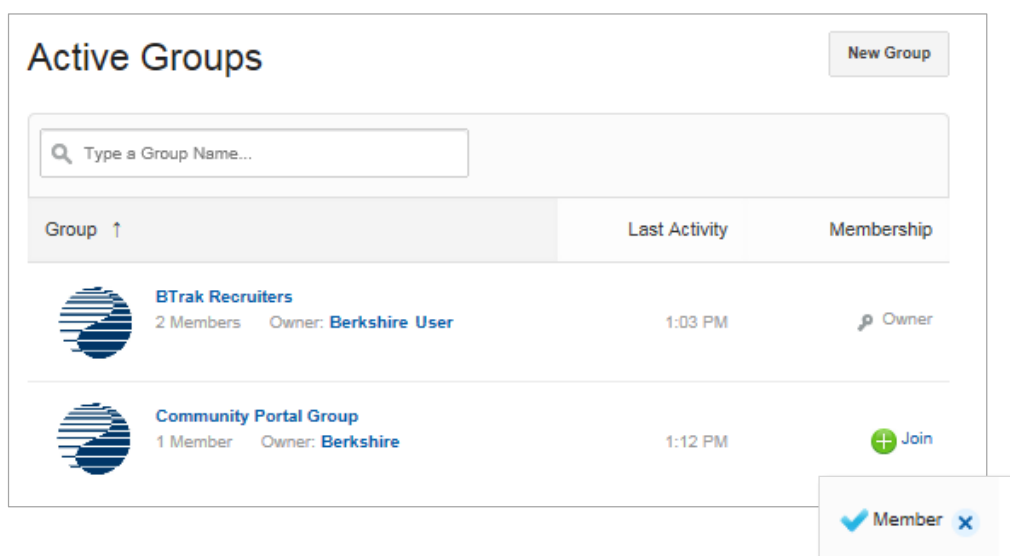
There are two types of Community Groups, as determined by the group Owner:



- Private**  
 Members are approved by the group Owner, and only members see updates on the **Community Group** tab.  
 OR
- Public**  
 Any Community member may join, and all Community members see updates on the **Community Group** tab.

## Join a Group

- From the *side navigation menu* on the **Community Group** tab, choose **Groups** > **Active Groups**.

2. A list of Active Groups will display.
  - a. For a group you wish to join, select the  **Join** button in the Membership *column*.



- b. The **Join** button will convert to the  **Member** icon.
3. To discontinue Membership in the Group, click the  **Leave this group** button.

**Quick Tip:** Active Groups can also be accessed from your User Profile page. Select the **Overview** tab, and locate the **Groups** list.




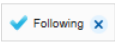
4. Once you join a Group, it will appear in the *side navigation menu* under: **Groups / My Groups**.

## Follow other Community Members

Follow other members to receive updates involving those members on the **Community Group** tab, by clicking: **Feed > What I Follow**. To **Follow** another member:

1. From the *side navigation menu*, choose **People > All People**.
2. A list of all current members, or All People, will display.

To the right of All People, the system will display Recommendations about People you may want to follow. Recommendations are based on their Community activity, which is summarized for each recommended person, as applicable.

3. Search for, or locate a member; then select the  **Follow** button for that person.
4. The  **Follow** button converts to  **Following**: 




## Chat and Share Files with other Members

The **Community Group > Feed** allows members to push out content for targeted audiences. There are two principal types of chats available — Post and File — which are described below. Select one from the *upper toolbar*:



### Share a Post

1. With **Feed** selected from the *side navigation menu*, click the  **Post** icon. A message palette will open:

The image shows a message palette. At the top is a text input field with the placeholder text 'Share an update, @mention someone...'. Below the input field is a toolbar with icons for text formatting: Bold (B), Italic (I), Underline (U), Strikethrough (ABC), and a list icon. Below the toolbar is a dropdown menu showing 'To My Followers' with a downward arrow and an information icon. To the right of the dropdown is a green button labeled 'Share'.

2. Enter the chat message.
3. Format the message, using the text editor icons in the *lower toolbar* (Bold, Italic, Underline, Strikethrough). Paragraph options can be applied for: Numbered List or Bulleted List.


**Quick Tip:** To clear the applied formatting, click the  **Remove Format** icon.

4. Select the audience:
  - My FollowersOR
  - A Group (and Search for one)

**Quick Tip:** Before composing the message, access **Groups / Active Groups** in the *side navigation menu* to consider the larger audiences.

5. When the message is satisfactory, click the **Share** button, located in the lower right.
6. For the audience you selected or followers, the chat will be shared on the **Community Group Feed**.

## Share a File

1. With the **Feed** active, select the  **File** icon.
2. Choose whether to:
  - **Select a file from Community Group** — Choose a file from: Recently Viewed Files, My Files, or Files in My Group. Then click the **Attach** link, associated with the file.
  - **Upload a File from your Computer** — Click the **Choose File** button; locate the file, and enter a message. Then choose an audience.
3. Click the **Share** button.
4. The file will be added to the Feed as a thumbnail for the audience or followers you selected. The file will be available for **Download**.

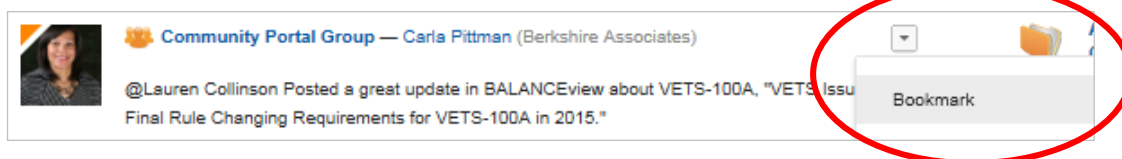
## Comment or “Like” a Post in the Feed

Labels are available under Feed Updates to add a **Comment** or **Like** a post.



## Bookmark a Feed Post

1. Click the  **Down Arrow** to the right of a post; then select **Bookmark**:




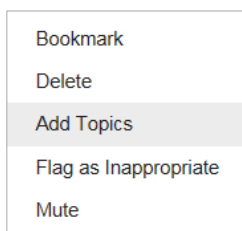
2. The item will be added to the *side navigation menu*, under: **Feed / Bookmarks**.

## Add a Feed Post to Topics

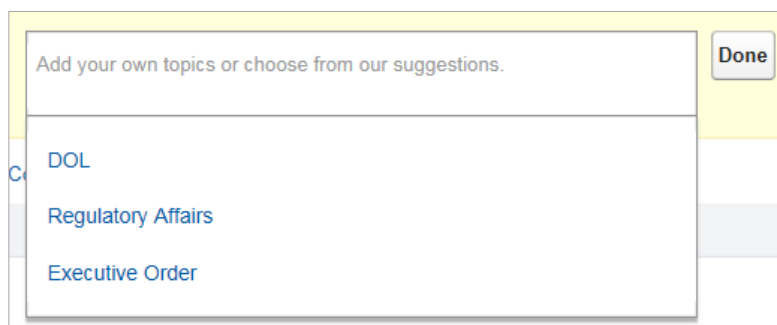
1. As shown above, certain types of recent Feed posts can be added to **Topics**, by using the tagline below the item: Click to add to Topics.

OR

Click the  **Down Arrow** to the right of the post to open the menu show below; and select **Add Topics**:



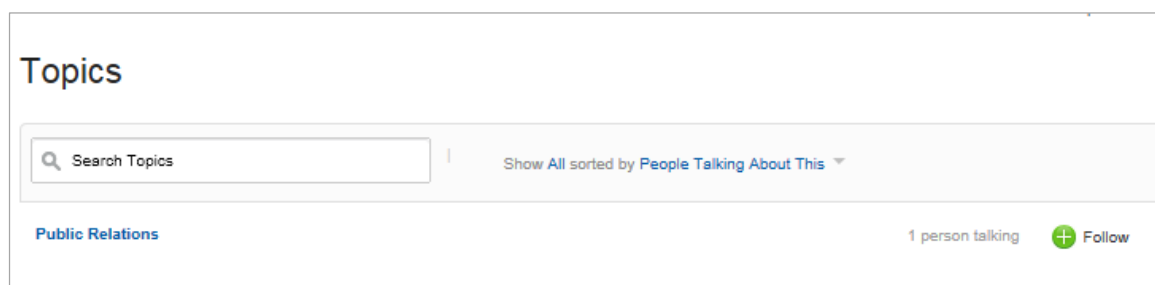
2. Enter a topic in the *upper field*, or select a suggestion from those provided in the *lower field*:



3. Click the **Done** button. To view a topic, follow the instructions below.

### View Posts by Topic

1. From the **Community Group** tab, select **Topics** from the *side navigation menu*.
2. A list of topics you created will appear under the Search bar.



### Change the View for Topics

1. Change the view between All, My Favorites, or Topics I Use, by clicking the entry after: Show.
2. Click the entry after: sorted by; and arrange **Topics** by People Talking About This or Name.

### Search for a Topic

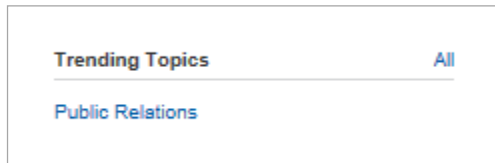
If the list of **Topics** is extensive, enter a few letters of a topic in the Search bar, and hit ENTER on the keyboard.

### Follow a Topic

Use the  **Follow** button to the right of the post.

## View Topics on the Feed


If a particular topic has become recently popular, it will appear on the **Feed**, under: **Trending Topics**:

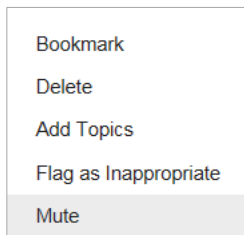


OR

Click **All** to show all **Topics**.

## Mute a Post

1. Click the  **Down Arrow** to the right of a post; then select Mute:



2. When the confirmation message displays, click the **OK** button.
3. The item will be moved to the **Feed / Muted** folder.

## Advanced Tools to Upload and Share Files

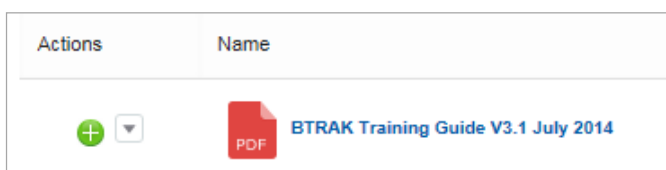
### Upload a File to Own (and Share)

1. From the **Overview** tab of your User Profile page, locate **Files Owned**. Then click **Show All**.
2. The Files Owned list will display, labeled with your Username.
3. Click **Upload File**, and locate the file on your computer.
4. A process bar will appear, indicating when the upload is complete.
5. Click **Close** to add the file to the Files Owned list.

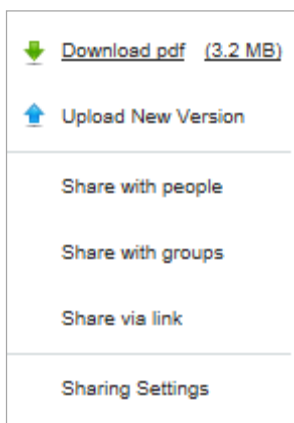
**Note:** The maximum file size is 2 GB.


## Turn on Full Community Sharing for an Owned File

1. Click the  **Down Arrow** in the Actions *column* for the particular document.




2. From the provided drop-down, select Sharing Settings.



3. A table will display, with *columns* for Shared With and Permissions.
  - a. Review options for Permissions by clicking  **Learn More**, either: No Access, Collaborator, or Viewer.
  - b. Locate the line for: Any user in your community. Change No Access to either Collaborator or Viewer.
4. Click **Save**.

## Share an Owned File with Particular Recipients

1. To share the file from the Owned Files list, click the  **Down Arrow** in the Actions *column* for the particular document, presentation, or image.
2. From the provided drop-down, select one of the three available options:
  - **Share with people** — Search/enter a name, and check off as Collaborator or Viewer. Enter an optional message.

The recipient will receive an email message, with a link. The recipient can also navigate to the **Community Group** tab, and locate the item, using the **Files > Shared with Me** link in the left-hand *column*.

- **Share with groups** — Search/enter a group, and check off the appropriate permission. Enter an optional message.
  - **Share via link** — A link is provided that you can copy and share via your email application.
3. Select the **Share** button.

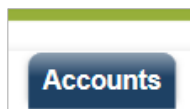
### Review an Uploaded Document and its Sharing Settings

1. From Owned File on your User Profile page, click the name of a file.
2. A page will display that allows you to view the file and associated settings.

**Quick Tip:** For easy access to each file's detail page from the **Community Group** tab, choose **Files** from the *side navigation menu*.

The “restricted” portions of the Berkshire portal — **Accounts**, **Projects**, **Cases**, and **Training**— are for the use of your organization and authorized Berkshire employees only.

## View (your Berkshire) Accounts



**Note:** The primary contact or other user with appropriate permission for the Berkshire client will have access to an additional tab for **Sales Invoices**. Contact your Berkshire Account Executive for more information.

### View Accounts

1. Select **Accounts** from the *tab header*.
2. If your organization maintains one or more accounts with Berkshire, the list of these **Accounts** will be displayed.

**Quick Tip:** Most clients will have one Account.

3. Click the [**Account Name entry**] to display the Account Detail, containing information, such as the name and contact details for your Account Rep, along with lists for **Contacts**, [Cases](#), and **Training**.

### View Projects

1. Choose **Projects** from the *tab header* to view a summary list of the services and/or products we are providing to your organization.
2. A list of Projects displays by Project Name, Project ID, Project Status, Project Type, and Parent project.
3. Use the filter drop-down in the upper right to show Projects by:
  - Recently Viewed (default)
  - Recently Created
  - Recently Modified
4. View the Project Detail by clicking on the Project Name.

## Get Help (through) Cases



The Berkshire Community Portal offers a convenient way to obtain assistance from Berkshire representatives, regarding services we are providing or software products you have purchased.

 A screenshot of the "Cases Home" page. At the top, it says "Cases Home" with a small icon. Below that, it says "Select the cases you want to view from the dropdown." There is a "View:" dropdown menu set to "All Cases" and a "Go!" button. Below this is a section titled "Recent Cases" with a "Create New Case" button and a "Recently Viewed" dropdown. A table lists recent cases with columns: Case Number, Subject, Date/Time Opened, and Priority. One case is listed with Case Number 00009379, Subject Manage Documents, Date/Time Opened 9/28/2014 3:38 PM, and Priority 3 - Medium.
 

Case Number	Subject	Date/Time Opened	Priority
00009379	Manage Documents	9/28/2014 3:38 PM	3 - Medium

## Open a Case

1. A support case may be initiated in one of two ways:
  - From **Community Home**, click the **Get Help** icon.
 OR
  - Choose the **Cases** tab from the *tab header*.
2. Click the **Create New Case** button.
3. The New Case menu will already be labeled with your Owner/Contact Name.

**Note:** Entries are required in all *fields*.

- a. Under Contact Information, navigate to the line: I Need Assistance With. Choose one of the following categories:
  - BALANCE*aap*
  - BALANCE*pay*
  - BALANCE*trak*
  - Consulting Services
  - Accounting
  - General Question
- b. Enter Additional Information, using the provided drop-downs. All “new” Cases are assigned that status.



- c. Enter Description Information, including Subject and Description. (The more information you provide in these *fields*, the better we can assist you.)

- d. (Optional) Click the **Check Spelling** button, located in the lower right.
4. Click the **Save & Close** button if you are not ready to send us the Case; or click **Submit**.
  5. The Case will appear under Recent Cases, by Case Number, Subject, Date/Time Opened, and Priority.

**Quick Tip:** Sort Recent Cases by the View menu in the *page header*. (Click Go! when a View has been chosen.) Or use the drop-down on the right side of the list to filter by My Open or Recently Viewed.

## Projects and Training



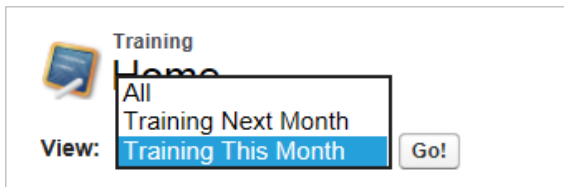
Two tabs, **Projects** and **Training**, hold information about the work we are doing for you in those categories.

For **Projects**, key information on Recent Projects includes Project Name, Project Status, and Type. By clicking on the [\[Project Name\]](#) link, the Project Detail will display, showing the project's Begin and End Dates, among other information.

Recent Projects	
Project Name	
<a href="#">8/1/15 Btrak Tech Support</a>	
<a href="#">03/01/15 BALANCEtrak Training</a>	
<a href="#">09/01/14 AAP</a>	
<a href="#">08/01/14 HR Services</a>	
<a href="#">09/01/13 AAP</a>	
<a href="#">04/01/13 HR Services</a>	

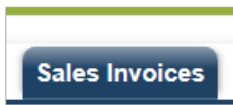
If you have ordered Training from Berkshire, visit the **Training** tab to view all courses that were ordered or just upcoming events. At the top of the page, open the View drop-down, to see Training activities by the following parameters:

- All
- Training Next Month
- Training This Month



Then click the **Go!** button.

## Sales Invoices



Authorized users will have access to view **Sales Invoices** for the Berkshire products and services we have provided. Here, information is organized by Sales Invoice No., while showing key data, such as Date, Ship Date, Terms, and State (e.g., Open, Closed). By clicking on the Sales Invoice No., a detail will display.

