**ClickUp Full Training Workbook**

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| **This workbook belongs to:** |  |
| **Email address:** |  |

This workbook is designed to help you reflect on and understand how to work professionally with ClickUp. Please answer each question thoughtfully. If you are unsure, bring your questions to the live training session.

**Part 1: Getting Started with ClickUp**

**Question 1:**  
Why is it important to always use "List View" instead of "Board View" when working in ClickUp?

**My Answer:**

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**Question 2:**  
What are the three main task statuses in ClickUp, and when should you use each?

**My Answer:**

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**Question 3:**  
How can filters help you manage your tasks more effectively?

**My Answer:**

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**Question 4:**  
Why should you always copy-paste order numbers from Shopify instead of typing them manually?

**My Answer:**

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**Question 5:**  
What information should always be included when creating a new task?

**My Answer:**

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**Question 6:**  
Why is it important to assign tasks to the correct team and not to individuals?

**My Answer:**

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**Question 7:**  
How do you use tags in ClickUp, and why is it important to keep them updated?

**My Answer:**

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**Question 8:**  
What is the correct way to write dates in ClickUp, and why do we use this format?

**My Answer:**

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**Question 9:**  
Why is it important to upload proof, like pictures, when dealing with broken items or returns?

**My Answer:**

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**Part 2: ClickUp Rules and Task Assignments**

**Question 10:**  
Why must you always search for an order number before creating a new task?

**My Answer:**

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**Question 11:**  
Why should you never delete tasks in ClickUp, and what should you do instead?

**My Answer:**

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**Question 12:**  
Who should you assign a task to when dealing with partial refunds, and why?

**My Answer:**

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**Question 13:**  
What steps should you follow when a customer receives a broken or incorrect item and wants a refund?

**My Answer:**

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**Question 14:**  
How do you handle address errors, and what should you update in ClickUp?

**My Answer:**

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**Question 15:**  
What should you do when a customer reports no movement on their tracking number for several days?

**My Answer:**

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**Question 16:**  
Why should disputes (like PayPal, Klarna, or Airwallex) never be closed, and who should they be assigned to?

**My Answer:**

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**Question 17:**  
What is the process for handling a lost document, and who is responsible for following up?

**My Answer:**

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**Task Status and Communication**

**Question 18:**  
What is an "Open" task, and when should you use this status?

**My Answer:**

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**Question 19:**  
What is an "In Progress" task, and when should this status be used?

**My Answer:**

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**Question 20:**  
What does it mean when a task is "Closed," and when should you close a task?

**My Answer:**

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**Question 21:**  
What should you do if you are waiting for a response from a sales agent or owner and they do not reply within 2-3 days?

**My Answer:**

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**Question 22:**  
Why is it important to check Open and In Progress tasks daily?

**My Answer:**

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**Question 23:**  
Why should you always keep a polite and professional tone when writing messages in ClickUp?

**My Answer:**

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**End of Workbook**  
Please save this workbook and email it to: **jobs@xplodemedia.nl**