

DESCRIPTION:

This hands-on training course is targeted at those who maintain the Integra application - from adding customers to location setup, configuration of the overall Integra Program. This class will cover the following application topics in detail.

NOTES:

This course is for Integra users who maintain the Integra system. This class is not designed for those running dispatch. However, dispatchers would gain insight into the steps required prior to order entry and may improve cross-functional understanding between departments.

TOPICS:

Company Maintenance

- Default settings
- Options
- Discount
- Charges (setup)

Customer Maintenance

- Options settings
- Email setup
- Charges
- Notes

Job Maintenance

- Quotes
- Options 1&2
- Credit
- Email setup
- Rename option

Support Maintenance

- Tax Maintenance
- GL Setup
- City Maintenance

Pricing

- Options
- Price group
- Subtopic

Product maintenance

- Settings
- Category Control
- Price group
- Cost tab

