

DESCRIPTION:

This hands-on training class takes an in-depth look at the MOBILEsales application functionality and integration with Apex.

NOTES:

This workshop is intended for those interested in, or already using, MOBILEsales for Apex for Bulk Materials operations. For Ready Mix Operations please see specific MOBILEsales for Ready Mix session.

TOPICS:

Integration

- Apex
- Data sync for MOBILEsales and Apex

Home Screen

- Navigation
- Tiles and Links

Companies

- Company and Contact search
- Prospect vs Company
- Company Tabs: Bid History, Contacts
...
- Contact Tabs

Bids

- Bid Search
- New Bid
- Tax Integration
- User Defined Fields
- Products
 - Add Products
 - Product Templates
 - Edit Products
 - Forecast Products
 - Multiple Freight Types / Rates
- Bidders
 - New Bidders
 - Quoting Bidders
 - Creating Sale Orders
- Schedule
- Cost Analysis
- Competitors
- Lost Reasons

Sale Orders

- Today and Tomorrow Orders
- Search Orders
- Order Drill Down

Reports

- Overview of New Reporting Platform

Admin

- User Profiles
- Standard Clauses
- Project Statuses
- Product Templates
- Plants
- Competitors
- General Admin Tabs

