

DESCRIPTION:

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

NOTES:

This workshop is intended for those interested in, or already using, MOBILEsales for COMMANDseries or Integra. For Bulk Operations please see specific MOBILEsales for Bulk Materials session.

TOPICS:

Integration

- Integra
- COMMANDseries

Home Screen

- Navigation
- Tiles and Links

Bids

- Bid Search
- New Bid
- Tax Integration
- Products
 - Add Products
 - Product Templates
 - Edit Products
 - Forecast Products
 - Price Lists
- Bidders
 - New Bidders
 - Quoting Bidders
 - Creating and Exporting Projects for Specific Bidders
 - Surcharges / Sundry charges
- Schedule
- Cost Analysis
- Competitors
- Lost Reasons

Orders

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

Companies

- Company and Contact search
- Prospect vs Company
- Company Tabs: Bid History, Actual Sales / Volumes
- Contact Tabs

Reports

- Overview of New Reporting Platform

Admin

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

