

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

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, Actual Sales / Volumes
- Contact Tabs

Bids

- Bid Search
- New Bid
- Products
 - Add Products
 - Product Templates
 - Edit Products
 - Forecast Products
- Bidders
 - New Bidders
 - Quoting Bidders
 - Creating Sales Orders
- Schedule
- Cost Analysis
- Competitors
- Lost Reasons

Sales Orders Orders

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

Reports

- Call Report
- Project Map
- General Reports

Admin

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