

Course Description:

This class will introduce new users to the configuration and use of COMMANDquote. An overview of the flow of data, the pricing hierarchy, the quoting process and the setup of items in COMMANDseries will be described. The student will learn the differences between Pricing Plants and Shipping Plants and Jobs, Quotes and Projects. Demonstrations, hands-on practice, and group discussions will be used to provide students with the knowledge and skills required to enter new contacts, jobs, quotes and projects into COMMANDseries to ensure a smooth execution of standard business processes.

Who should attend and when:

Anyone in your organization who is new to COMMANDseries and will be entering Contacts, Jobs, Quotes and/or Projects, such as Sales Representative, Sales Assistants Dispatch Personnel, or Billing Personnel should attend. If your company is new to COMMANDseries, this class should be taken prior to Go-Live.

Prerequisites:

Prior to attending this class the student should:

- Possess basic Windows Operating System skills
- Be comfortable with the use of a keyboard and mouse
- Understand how quotes, jobs and projects and pricing are currently structured at your company
- Understand their specific job responsibilities within your organization

Course Objectives:

After completing this class students will know how to:

- Describe the purpose of COMMANDquote
- Describe the flow of information in COMMANDseries
- Describe the COMMANDseries Pricing Hierarchy
- Describe the setup of items in the system
- Define the difference between Pricing Plant and Scheduled Plant
- Define the difference between Jobs, Quotes and Projects
- Describe the Quoting Process
- Enter new Contact Types, Job Source Codes, Job Types & Reason Codes
- Enter new Contacts
- Enter new Job
- Enter new Quotes
- Create a Quote from a Job
- Enter new Projects
- Create a Project from a Quote
- Determine an appropriate quoted price using the Bid Price Calculator
- Generate a report
- Select appropriate Quote reports
- Use COMMANDseries Online Help and Workplace Features