Session Details

Introduction

The purpose of this session is to use Online Enquires to create send outs using ITT letters, bill creation, tailored packaged documents, and manage the responses using reporting and tracking tools.

Prerequisites

This session has the following prerequisites:

ConQuest software has been installed and configured

Relevant User accounts have been setup on ConQuest

Delegates are set up to receive remote training

Attendance

This following people should be present during this session:

Software Trainer Consultant plus up to 6 Delegates (min 2)

Timings

This session duration is 1/2 Day 09:30 to 12:30 AM or: 13:30 to 16:30 PM

Expected Learning Outcomes of Session

The expected **outcomes** of this session are:

Checking Resourcing for Send-Outs

Creating New Send Out

Importing Files for use in Send Out

Assigning Files to Trades

Creating Q Files

Assigning Contacts

Creating the E-Mail

Using the Tracking System on On-Line Enquires

Useful Reports

Topics Covered

The Training Consultant will lead the session, which will cover how to:

On Line Enquiries Overview

Package Creation

Database Requirements

Configuring the Contacts Database

Projects Register Options

On Line Enquiries Options

Resourcing the Project

Creating a Send Out

Uploading Trade Documents

Amending before uploading

Assembling Trade Packages

Creating Q Documents

The Excel Bill Format

Inserting Trade Details and Creating Letters

Adding & Using Contacts

Selecting Enquiry Recipients

Adding & Deleting Contact Emails

Using Temporary Contacts

Copying Contacts to other Trades

Using Usual Suspects

Using Email with the Sendout

Enquiry As Sent To Recipients

Understanding how subcontractors view and download documents

Tracking Responses

Monitoring Responses

Using Filtering

Using TAGS

Creating follow up emails

Producing Reports