Session Details

Introduction

The Admin course aims to help anyone involved in administrative tasks in support of estimating and surveying teams focusing on Importing bill information into ConQuest and creating and managing Online Enquires processing.

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 and have access to the training documents

Attendance

This following people should be present during this session:

The nominated ConQuest users up to 6 Delegates (min 2)

Access Group: Software Trainer Consultant

Timings

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

Learning Outcomes of Session

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

Be able to navigate effectively around ConQuest Estimating Module

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



Topics Covered

The Trainer 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

Templates

Creating Templates

Inserting field names manually

Inserting field names with drag and drop

Send Outs

Resourcing the Project

Creating a Send Out

The effect of changes

Uploading Trade Documents

Amending before uploading

Assembling Trade Packages

Creating Bill Abstracts

Zero or Negative quantity Items

The Excel Bill Format

Downloading Trade Extracts

Inserting Trade Details and Creating Letters

Managing the Contacts Database

Selecting Enquiry Recipients

Adding Contacts

Deleting Contact Emails

Removing Contact Companies

Temporary Contacts

Copying Contacts to other Trades

Usual Suspects

Storing a Usual Suspects list

Using Usual Suspects

Updating Usual Suspects

Email

Enquiry As Sent To Recipients

All Documents Download

Individual Documents

Tracking Records

Amendments to a Send Out

Moving a send out

Moving when copying

Moving within On Line Enquiries

