## TITAN 3000 PRECAST MANAGEMENT SYSTEM
# CRM and Project Management Agenda

## TITAN ONLINE

**10:00 a.m. - 2:30 p.m. (each day) – November 19-21, 2024**
**All times are Eastern Time**

*In this instructor-led seminar, attendees will log in to the instructor's laptop and work alongside the instructor and other class participants using dummy data to perform tasks.*

In this virtual seminar we will be reviewing the customer relationship manager areas in Titan 3000 as well as the Contractor Hub module and how you can establish an open line of communication with your contractors. Project management areas by engineering status, quote manager, task manager, and built-in/custom reports will also be areas of focus. We will be diving deep into the job screen and how to manage open orders with regards to production, dispatch, QC and invoicing. Successful completion of the seminar includes **three credits** toward Gladiator Certification.

### CRM and Project Management Day 1

**10:00 – 10:30 a.m.:** Introduction to the seminar in Titan via the instructor's data.

**10:30 – Noon:** Review of the CRM portions built into customer maintenance which include different note options, contacts, customer dash- board, notes/task manager, calendar, and appointments.

**Noon – 12:30 p.m.:** Lunch break.

**12:30 – 2:30 p.m.:** Analyzing of open orders relative to tracking production, deliveries, QC, and invoicing.

### CRM and Project Management Day 2

**10:00 a.m. – Noon:** Continuation of looking at open orders and how to run specific reports in anticipation schedule, open job orders, open pur- chase orders, production, inventory, aged invoices, and sales reporting screens.

**Noon – 12:30 p.m.:** Lunch break.

**12:30 – 2:30 p.m.:** This period of time will be dedicated to project engineering manager, quote manager, and other applicable screens related to open orders.

### CRM and Project Management Day 3

**10:00 a.m. – Noon:** Review of set-up involved in using the Contractor Hub module.

**Noon – 12:30 p.m.:** Lunch break.

**12:30 – 2:30 p.m.:** Utilizing the Contractor Hub and syncing back requests for production, drawings, deliveries, and invoices back to Titan. The user will be able to see the flow of how contractors and the precasters communicate with one another in the Hub and how it translates back to the project in Titan.



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