

## TITAN 3000 PRECAST MANAGEMENT SYSTEM

# Quote/Job Order Processing Agenda

## TITAN ONLINE

**10:00 a.m. - 2:30 p.m. (Each Day)**

**April 2-4, 2024**

All times are Eastern Time

In this interactive online seminar we will train users on the Quote/Job Order Processing area of the system. This area of Titan is critical to the estimating portion of the system and serves as the hub for other processes. The necessary setup, navigation and capabilities of this screen will be the focal points in this seminar. Successful completion of the seminar includes three credits toward Gladiator Certification.

*In this instructor-led seminar, attendees will log in to the instructor's laptop to view the training.*

### Seminar – Day 1

**10:00 – 10:30 a.m.**

Introduction to the navigation and capabilities within the Quote/Job Order Processing screen from instructor's data. Review of customer maintenance setup and applicable areas in list maintenance.

**10:30 a.m. – Noon**

Setting up product codes and the importance of type, part types, dimensions, product lines, costing, and pricing in the Job Order Processing screen. We will explain the various ways to quote a job through Titan, including quoting through visual takeoff, assembly structure, manual entry, or as AR products.

**Noon – 12:30 p.m.**

Lunch break

**12:30 p.m. – 1:00 p.m.**

Review of structure maintenance on how to set up structure codes to either be used in visual takeoff or with the assembly structure feature.

**1:00 – 2:30 p.m.**

We will then dive into the process of entering a quote from scratch and the impact that the fields in the General tab have on the system. Quote Manager, printing/emailing quotes, and archiving quotes will also be covered in this timeslot.

### Seminar – Day 2

**10:00 – 10:30 a.m.**

Q&A of anything that was reviewed during Day 1.

**10:30 a.m. – Noon**

Continuation of the exercises from Day 1. In this session, the Structures and Detail tabs will be thoroughly reviewed. Attendees will complete exercises on quoting through visual takeoff, assembly structure and manual entry, as well as AR products.

**Noon – 12:30 p.m.**

Lunch break

**12:30 – 2:30 p.m.**

Continuation of the quoting exercises. This will then lead us into pricing and the methods available to price within Titan. The price levels screen will be a major point of emphasis as well.

### Seminar – Day 3

**10:00 a.m. – Noon**

This timeslot will be dedicated to useful fields in the Miscellaneous tab and in the set up and application of the Notes/Tasks tab. We will also review the External Notes tab.

**Noon – 12:30 p.m.**

Lunch break

**12:30 – 2:30 p.m.**

We will cover how to quote through the Additional Prospects/Bidders tab, followed by focusing in on the Show All Tools section of the job screen and those features and utilities. The training will close with an demonstration of the impact of toggling through the wide array of Detail Selections and Column Displays.

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